Building a Common Eurasian Infrastructure: Agenda for the Eurasian Economic Union[1]

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Abstract

The paper focuses on the development trends of the transport infrastructure of Eurasia in the context of the economic and political integration of the countries on the continent. Leading states of the Asia-Pacific region (APR) made proposals on large-scale infrastructure projects in the Eurasian space after financial crisis 2008–2009. Russia is extremely interested in integrating into these initiatives, but faces a number of difficulties. Some of them are connected with the peculiarities of regulation of transport issues within the framework of the Eurasian Economic Union.

The article analyzes Russia's current infrastructure development dialogue with the APR states, including the initiative of coordination of the Eurasian Economic Union and the Silk Road Economic Belt. The authors examine main Eurasian infrastructure projects interesting for complex EEU infrastructure development as well as the main challenges and opportunities for Russia arising in the framework of the interaction of the EEU and the APR countries in the field of infrastructure.

The authors conclude that integration of Russia into Eurasian transport and logistics initiatives requires the coordination of the transport agenda with trade and investment regulation. This coordination suggests close cooperation with the Eurasian Economic Commission, and in the long term – even the transfer of competencies related to the development of the EAEU infrastructure agenda to the supranational level.

Key words: Russia; Eurasia; infrastructure; conjugation; EEU; transport

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Introduction

After the global financial crisis of 2008–2009, all major Asian countries initiated or supported large-scale infrastructure projects in Eurasia. For example, the Association of

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Southeast Asian Nations (ASEAN) made great efforts to promote a concept of "building up mutual ties" within the Association and as part of a Regional Comprehensive Economic Partnership (RCEP) project [Kimura, 2010; Lewis, 2013]. In October 2013, Korea officially presented its Eurasia initiative [KIEP, 2013]. India began to position itself as a continental power and promote the idea of a trans-Eurasian North-South International Transport Corridor [KIEP, 2013]. Finally, in 2013, China inaugurated its ambitious initiatives – the Silk Road Economic Belt and the Maritime Silk Road, which were later united into one mega-initiative – the Belt and Road [Wang, 2016].

Russia is also interested in participating in the Eurasian international transport agenda through various institutions and agencies. First, several initiatives are now discussed at the bilateral level, primarily projects for the development of cross-border transport corridors between Russia and China [Zuyenko, 2017], between Kazakhstan and China [Abdullayev et al., 2016] and at the trilateral level between Russia, North Korea and Korea [Lee, 2017]. Second, the transport agenda is partly the responsibility of the Eurasian Economic Commission (EEC), since it is the body that is responsible for implementing the EAEU-SREB integration [Skriba, 2016; Makarov, Sokolova, 2016]. Third, the Eurasian Development Bank (EDB), which is both an investor and coordinator of investments from other development institutions for infrastructure projects in the EAEU, is very proactive [TASS, 2016]. Finally, some projects are implemented within the framework of direct cooperation between EAEU countries and international development institutions such as the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development, and others.

Today, the transport agenda in relations between the EAEU and Asia-Pacific countries is present only in negotiations with China. In the future, it will develop the framework of negotiations for free trade agreements (FTAs) with Singapore regarding the regulation of transport services. From a strategic point of view, it is the interaction between the EAEU and countries of the region that is a key track for implementing the Eurasian transport agenda. The main reason is that the EEC is the only player that can in the future represent a consolidated position of the EAEU countries on three principal issues – trade, investment and infrastructure.

The key obstacle to the development of such a dialogue is the EAEU's lack of the necessary level of authority to form an all-Union transport agenda with third countries. Moreover, even the implementation of elements of the common transport policy within the Union sometimes leads to strong disagreement between its members, primarily Russia and Kazakhstan. To date, the EAEU transport agenda is not linked to the trade and investment agendas, and they are not even discussed as interrelated. The EAEU has still not discussed how the liberalization of trade can help ensure the profitability of infrastructure projects, although this issue has a direct bearing on ensuring stable regional integration.

This article analyzes existing Eurasian infrastructure projects and suggests mechanisms that can help the EAEU increase its participation in these projects. The following paragraphs discuss the main transport initiatives implemented in Central and East Asia which are of potential interest for forming an integrated infrastructure agenda for

the EAEU. This is followed by an analysis of prospects for the development of air transport in Eurasia. The article concludes with the discussion of the main challenges in the transport and logistics sphere that Russia faces in the framework of dialogue between the Eurasian Economic Commission and its partners, as well as recommendations on how to improve the work of Eurasian institutions in this field.

Transport Initiatives in Central Eurasia

The Silk Road Economic Belt is the main component of the development of infrastructure in Central Eurasia. The SREB is a common name for several infrastructure, energy and other projects planned or already implemented in the central part of the Eurasian continent with the participation of China. Since Xi Jinping first mentioned the Silk Road Economic Belt initiative in his speech in Astana in 2013, China's views on a common Eurasian infrastructure have been revised several times. At first, the SREB and the 21st Century Maritime Silk Route were united into the One Belt One Road initiative, and later it was changed to the Belt and Road initiative. However, the SREB still does not have any practical content. Many commentators, following a natural analogy with the ancient Silk Road, interpret the SREB's goal as creating new routes for the supply of Asian goods to Europe. In 2014 when Xi Jinping announced China's readiness to invest $40 billion in the Silk Road Fund for the SREB, he also proclaimed the goal of building and modernizing transport infrastructure to increase trade with Europe [Hong, 2017].

Not surprisingly, most of the discussions about the SREB compare various routes from Asia to Europe. Most experts say that the most realistic option is the supply of goods from Western China via Kazakhstan and then across Russia and via Moscow to the border with the European Union. This route has been already functionings: since 2011, container trains have been regularly delivering Hewlett-Packard monitors and laptops from Chongqing (China) to Duisburg (Germany). Beginning in 2012, trains go about once a week between Chengdu (China) and Lodz (Poland) along the Trans-Siberian Railway. In 2013, the Jinghe-Khorgos-Zhetygen railway was finally opened, which reduced the time of cargo delivery from Chongqing to Duisburg to 15 days. However, using this route on a broader scale will require significant investment in infrastructure modernization [Makarov, Sokolova, 2016].

One of the options for the development of this route is the construction of a high-speed line along it. In October 2014, Chinese investors said they were ready to invest in the construction of a Moscow-Kazan high-speed railway under the condition it was extended to Beijing. Russian Railways has been actively promoting this corridor under the brand "Eurasia High-Speed Railway," which is planned to link Berlin, Moscow and Beijing. However, many experts doubt the profitability of transporting cargo and passengers such large distances along a high-speed railway. Even conventional rail freight services are more expensive than delivery by sea, and passenger rail services are hardly competitive in comparison with air services [Karaganov et al., 2015].

The construction of the Moscow-Kazan leg of the railway is still at the approval stage. In June 2016, China reiterated its readiness to invest at least $8 billion in it, and shortly thereafter, a consortium of German companies expressed the desire to participate in the financing. The Russian authorities, too, view the Moscow-Kazan high-speed railway as a priority project. In 2015 Vladimir Putin said that it would "become a benchmark project for Russian-Chinese cooperation in the transport and infrastructure" [JSC "High-Speed Rail Lines", 2015]. However, the construction of the railway has not begun: it is impeded by numerous factors, ranging from funding procedures and the track gauge to who will do the contract work.

Another option which features extensively in discussions about the SREB is a route bypassing Russia. The cheapest variant is a route via Kazakhstan and Iran, where freight delivery to Europe will cost about $1,700 per TEU. This route will require about 2 billion dollars in investment. Another route is via the Kazakhstani port of Aktau, from which cargo will be shipped across the Caspian Sea to Baku, then to Poti and across the Black Sea to Constanta. This route will be the most expensive for carriers: up to $5,000 per TEU. Only if large-scale investment ($8 billion) is made in the expansion of seaports, reconstruction of roads and construction of tunnels and container-logistics centers will the cost of transportation decrease to $1,500 per TEU [Karaganov et al., 2015]. From Baku, the route can go to Kars (via Nakhichevan or Tbilisi), and then by rail via Istanbul to Europe. Turkey is already developing its transport infrastructure, using Chinese investments, among others.

In addition to railways, highways need to be developed, too. In August 2004, the first trans-Chinese highway was opened. It runs from the port of Lianyungan to the Khorgos checkpoint on the border with Kazakhstan [Karaganov et al., 2015]. In 2016, China acceded to the Convention on International Transport of Goods, which has relieved it of the need to transfer the goods from Chinese trucks to Kazakh or Kyrgyz ones on the border and which has thus reduced the cost of logistics. The only major obstacle to the development of international road transportation in the region is the insufficient development of road infrastructure.

Major international projects in the field of road construction include the Western Europe-Western China transport corridor, intended to strengthen economic ties between Europe and Asia. The corridor will run from Russia's St. Petersburg to Lianyungang in China. In June 2016, Russia announced plans to build the Meridian highway. The $8 billion project will be a southern relief route for the corridor. It will be a straight 2,000-kilometer road stretching from the border of Kazakhstan to the border of Belarus and passing 350 km south of Moscow.

The idea of railway and road transit is actively promoted by Russian transport companies and leaders of Central Asian and some trans-Caucasian countries (some of these countries have even expressed readiness to change their track gauge, which is a very difficult process from both technical and foreign policy points of view) [Luzyanin et al., 2015]. At the same time, prospects for a significant increase in the transit of goods from China to Europe seem to be ambiguous. Trade in this direction has been growing more slowly than a decade ago. Chinese exports have been on a decline since 2014. Given the

still weak prospects for growth in the EU and the gradual transformation of the Chinese economy, these trends can be long term. At the same time, the last decade has seen the implementation of large-scale plans to build up sea transport capacities: the Suez Canal has been expanded, and the merchant fleet has significantly increased. In these conditions, the cost of sea shipping is likely to continue to fall, putting land transportation at a great disadvantage. The importance of non-economic factors (including military-political risks) will grow. These factors cause China to diversify its export routes, yet this is not a sufficient reason to redraw the entire logistics map of the continent.

Probably, transit as such is not the only goal of the SREB. Much more important are other reasons: the transfer of excess construction facilities, which emerged in China during the period of an infrastructure boom, to other countries; access to natural resources of Central Eurasia; a potential transfer of polluting and labour-intensive industries to this region, as these industries become less attractive in China with the growth of incomes and exacerbation of environmental problems; access to new sales markets (including the markets of countries such as Iran and Pakistan) which are not very large yet but will certainly expand over time; and relative stability in Central Asia and the Xinjiang Uygur Autonomous Region [Bordachev, Likhacheva, Xin, 2015; Makarov, Sokolova, 2016; Hong, 2017].

The China-Pakistan Economic Corridor is the fastest-developing part of the Eurasian infrastructure network. In 2015, China signed an agreement with Pakistan on a 40-year lease of the deep-sea port of Gwadar (near the border with Iran). A railway is already being built to link Kashgar (Xinjiang-Uygur Autonomous Region, Western China) and Gwadar. The railway will reduce cargo transit time from China to Pakistan from 12 days to 36 hours ["Silk Road Economic Belt" Project. Prospects for the CIS, 2016]. For the sake of the project, China was even ready for a conflict with India, as the railway passes through the disputed region of Kashmir. In April 2015, China sent the first investments ($1.65 billion) from the Silk Road Fund to Pakistan which, contrary to Xi Jinping's initial assurances about the fund's focus on transport projects, were allocated for the construction of a hydroelectric power station. The investments in Pakistan have nothing to do with the transit of goods to Europe; yet they are in tune with the main goals of the SREB: receiving access to new sources of natural resources and markets, increasing influence in Central Eurasia and diversifying export routes as a safeguard against the risk that the Strait of Malacca may be blocked and the rise military and political tensions in the Indian Ocean.

Transport Initiatives in East Asia

From the point of view of the development of transport infrastructure, East Asia is highly heterogeneous. Its largest economies – China, Korea and Japan – have dense internal transport networks which are isolated from each other. The Russian Far East, and especially Primorsky Krai which is located in the middle of the China-Korea-Japan triangle, can help link them into a regional infrastructure network. Factors that can facilitate this development include, first, the gradual regionalization of international trade

and the transition of Asian countries from the "Asia for the world" model to the "Asia for Asia" model [Bordachev, Likhacheva, Xin, 2015] and second, the gradual shift of the economic growth center in China from east coast provinces to the periphery [Makarov, 2017] which includes north-east provinces – Jilin, Heilongjiang and Inner Mongolia.

These provinces can be integrated into the world economy through international transport corridors (ITCs) Primorye-1 and Primorye-2, which run from Harbin to Vladivostok and from Hunchun to Zarubino. During Xi's visit to Russia in July 2017, the two countries signed an intergovernmental agreement to develop the corridors. According to optimistic estimates, freight turnover in the two corridors may reach 45 million tons by 2030, of which half will be grain (for example, soybeans supplied to northeast China) and half container cargo. According to estimates of the Ministry for the Development of the Russian Far East, the corridors may bring Russia an additional annual increase the gross domestic product of 29 billion roubles. The Primorsky Krai economy may grow by four to five percent and create about 3,000 new jobs. The corridors may help Chinese companies save $700 million [Dmitrikova, Drobysheva, 2017].

According to reports from regional administrations, cargoes are already supplied via the corridors, but these are trial deliveries as their volume does not exceed several hundred containers. Reaching the planned freight turnover target requires markedly increasing the carrying capacity of all types of transport infrastructure. Major highways are already being built or modernized. However, there are problems with the construction of the port of Zarubino, the key element of the Primorye-2 corridor. The project, proposed by Summa Group, provides for the construction of container, grain, alumina and universal terminals with a total capacity of 60 million tons. Initially, the company expected the government to participate in the funding, but the money was not allocated and the construction was actually frozen. Chinese partners, namely China Merchants Group with which an agreement of intent was signed, have not also hurried to finance the project [Zuyenko, 2017].

The wait-and-see strategy of all potential parties to the project is understandable. At present, there are too many uncertainties about the development of the Primorye-1 and Primorye-2 corridors.

First, although the distance of cargo transportation from Heilongjiang via Vladivostok is three times shorter than the route going via Dalian, it costs five to 15 percent more, according to McKinsey's estimates and, most importantly, it takes 220 hours instead of 85 due to long cross-border procedures [Zuyenko, 2017]. To reduce the transit time for certain categories of goods shipped via the ITCs, the Ministry for the Development of the Russian Far East has proposed that customs clearance for cargo delivered to ITC ports be carried out on the land border. This will help reduce the time of cargo delivery from 24 to 13 hours in the Primorye-1 corridor and to four to five hours in the Primorye-2 corridor [Vasilyeva, Nazipova, 2017].

Second, any potential investor wants to be sure that the corridors will really be used for cargo transportation after the modernization of the port and infrastructure. The Chinese cannot guarantee this, as the bulk of the cargo will be shipped by private companies, many of which are medium-sized and small [Zuyenko, 2017]. Their deci-

sions on transportation routes depend on a benefit-cost ratio. Unless shipment formalities in the Primorye corridors are eased essentially, they will hardly be competitive.

The Free Port of Vladivostok is one of the main instruments for facilitating the movement of goods. The porto franco regime, already extended to two dozen municipalities in the Russian Far East, is intended to attract investments in new production facilities, thereby expanding the export base, and to simultaneously simplify the servicing of potential freight flows. Too little time has passed to fulfill these goals. Yet there are still no signs that the free port status stimulates in any way the export of finished products. Russian Far Eastern ports show positive dynamics in terms of shipment of raw materials, but in container transshipment the Pacific basin in 2016 was the only one in Russia with negative growth rates. At the same time, the shipment of containers by rail is gradually growing, albeit from a very low starting position [Avelana, 2017].

The land transport infrastructure is no less important in trade with China. For example, a road bridge across the Amur river between Blagoveshchensk and Heihe will enable year-round and all-weather transport communication with this country. The two countries signed a concession agreement on the construction of the bridge in June 2016. The first stage of the construction is planned for completion in 2019. At the second stage, a railway bridge will be added to it. Within the framework of the development of Bolshoy Ussuriyskiy Island, Russia and China continue negotiations on the construction of a permanent two-way road checkpoint for passengers and cargo – Khabarovsk (Bolshoy Ussuriyskiy Island)-Fuyuan (China). In the Jewish Autonomous Region, the Birobidzhan-Ungun-Leninskoye road is now being reconstructed. It will open a new cargo transportation corridor from this region and the west of the Khabarovsk Territory to the Heilongjiang province [EAOMedia, 2017].

The construction of a Zabaikalsk-Manchuria grain railway terminal is to play an important role in the development of Russian grain exports to China. The terminal is expected to be put into operation in 2018. Later, it is planned to have a capacity of eight million tons of grain per year [Makarov, 2017].

East Russia can also be integrated into China's transport initiatives through a Sino-Mongolian-Russian economic corridor. In the spring of 2014, Foreign Minister Wang Yi said that this initiative would mean the integration of China's One Belt One Road project, Mongolia's Steppe Road initiative and Russia's Trans-Eurasian Corridor proposal. The development of a transport corridor to China via Mongolia would be of great importance for Eastern Siberia, as it would be able to supply products to China, bypassing bottlenecks in the eastern part of the Trans-Siberian Railway. In addition, a meridional transport corridor may enable the outsourcing of water and energy-intensive products from China to Eastern Siberia, which was previously held back by transport barriers [Makarov, Sokolova, 2016].

However, the China-Mongolia-Russia economic corridor project has not yet been started. The main reason is a lack of funding sources. Russia does not have available sources for such large-scale projects. Mongolia has never expressed interest in this initiative, as it does not see benefits for itself from it. For example, Russian coal that could be supplied via this corridor would be a competitor to Mongolian coal. As for China,

its demand for coal is uncertain as the country is switching to natural gas, while moving Chinese energy and water-intensive industries to Eastern Siberia does not seem an attractive idea to Chinese partners due to the low investment climate in Russia and high mistrust toward the Russian economy, rather than a lack of infrastructure.

Also, except for individual projects to ease cross-border formalities and build bridges, the agenda for integrating regional transport networks does not include the Amur, although there are good prospects for developing river transport in the region. A program for comprehensive development of the Amur as a transport/logistics waterway can solve several tasks at once: relieve the traffic on the Trans-Siberian Railway, facilitate access to foreign markets for Russian exports, establish elements of effective Russian-Chinese river management and consolidate the status of a dam-free river for the Amur, which would be advantageous to Russia and which is constantly disputed by China. According to preliminary estimates, the project for comprehensive development of the Amur as a transport waterway can be equated to the Baikal-Amur Mainline in terms of transportation capacity.

Given the unique biodiversity of the Amur, the river's importance for maintaining all ecosystems in the region, its status of the longest river border in the world and the significant imbalance in river management between Russia and China, the development of such a project requires a full-scale intergovernmental and interdepartmental dialogue, involvement of international development institutions and application of the principles of strategic environmental assessment, approved by the UN [Ministry of Natural Resources and Environment of the Russian Federation, 2015].

The experience of China's neighbors in the Mekong basin (Laos, Cambodia, Thailand, Vietnam and Myanmar), of India with regard to the Brahmaputra, and of Kazakhstan with regard to the Irtysh shows that progress in regulating the Amur basin is impossible without China's involvement in broader negotiation formats. Taking into account similar problems faced by China, Kazakhstan and Russia regarding the Irtysh, elevating the Amur issue to the Eurasian level seems promising, although it will face resistance from China which prefers discussing such issues at the level of bilateral basin commissions.

New Airline Hubs in Eurasia

Despite the relatively small share of air transport in the total volume of cargo transportation, its role is hard to overestimate for building up ties between countries and developing recreational and business tourism. Currently, the world's largest airline hubs are located on routes between three major economic centers: North America, Europe and East Asia.

In the near future, the world may see the rise of second-level production and consumer sites, which are now served on a peripheral basis by cargo aircraft from international megahubs. One such site will be in Central Eurasia. In the meantime, the region does not have full-fledged hubs for air carriers, and its air infrastructure is inadequate.

On the map of air routes, there is a large blank space between Frankfurt, the eastern coast of China and the south of the Arabian Peninsula, where there are no large air terminals and where flying rates are low (Fig. 1).

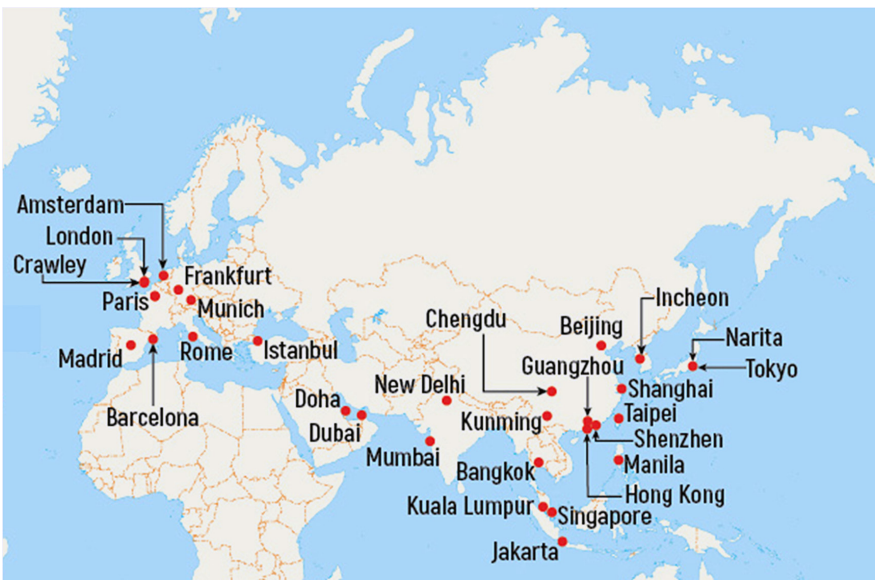

Fig. 1. Map of Megahubs in Eurasia

Source: [Maps of World].

Therefore, it is highly important to develop second-level continental hubs in Central Eurasia. It is unlikely that a new Dubai or a new Hong Kong will appear in the steppes of Kazakhstan or the deserts of Xinjiang in the next decade, but within the next five to seven years new second-level hubs must emerge in the region to serve the interests of industries and new private consumers. Airports in Russia, Kazakhstan, Western China, Turkey and Iran already compete to host such hubs.

Chengdu Airport is already among the 50 largest airports in the world in terms of cargo turnover [The Port Authority of NY & NJ, 2016]. The coming years may see growth in cargo traffic going through Xi'an, Lanzhou and Urumqi. The rate of construction of new infrastructure facilities in China is still unattainable for other Eurasian countries [KPMG, 2009]. Russia's partners in the Eurasian Economic Union have also announced their ambitious projects. For example, Kazakhstan's Alma-Ata plans to create a Eurasian airline hub from scratch [Nee, 2015]. Whereas previously such projects did not go further than political rhetoric, the implementation of SREB projects increases Alma-Ata's chances to attract large investors. Karaganda and Astana, too, have similar plans, although they have not been given as high a profile.

The intensification of economic and political processes in Central Eurasia opens wide opportunities for Russian airports. Yekaterinburg, Novosibirsk and Krasnoyarsk have the required competitive advantages to become full-fledged second-level hubs:

advantageous geographical locations, skilled personnel, technological production facilities of their own and relatively favorable natural conditions (low seismicity and non-proneness to typhoons and strong winds).

The myth of snow as a barrier to creating a successful hub has for years been effectively debunked by Anchorage in the United States, the fifth largest cargo hub in the world with a freight turnover of 2.5 million tons. This is almost twice as much as the freight turnover of all Russian airports. Normal rainfall from November to February in Anchorage (95 mm) is comparable with that in Yekaterinburg (107) and Novosibirsk (113) [Weather and Climate, 2017]. Megahubs were even created in a desert with a small population (Dubai), and in multimillion megacities prone to typhoons (Hong Kong and Shanghai).

Strong regional elites also increase the chance for effective cooperation with anchor investors and the attraction of efficient operator companies. The result is already there: both Yekaterinburg and Novosibirsk have in recent years begun to modernize their airports, Koltsovo and Tolmachevo.

The Russian Far East also has certain opportunities for developing airline hubs. This region is the closest to Asian markets: Vladivostok is within a two- to three-hour flight from key production sites in Asia. At the same time, Vladivostok's Knevichi Airport cannot compete with successful megahubs – Incheon, Shanghai, Hong Kong, Tokyo and Shenzhen – in serving the most popular routes, including routes to the United States. It would be much more promising for it to attract anchor companies from among the world's top 11 to 20 cargo carriers on most favorable terms and to serve as an auxiliary regional rather than transcontinental hub. It can follow the example of Liège Airport which opted not to compete with Frankfurt but rather supplement it as much as possible. As a result, it has become a successful example of a second-level hub over the last ten years [Orban, 2017]. Probably, the new owner of the airport, the Russian Direct Investment Fund, Changi Airports International of Singapore and the Basic Element group of companies will follow precisely this strategy.

Challenges to Russia and Recommendations for Integrating the Transport Agenda into the EAEU's Cooperation with Asian Countries

Even if we disregard the issue of infrastructure development funding, in the long term, Russia will come across several transport-related barriers that will prevent it from increasing exports to APR countries:

- excess load on the Trans-Siberian Railway, which holds back exports from the Russian Far East and especially Siberia in the absence of meridional routes;
- potentially high competition with Kazakhstan in exports, which can have a negative impact on the export potential of Siberia and the Russian Far East amid a fast build-up of Kazakh-Chinese infrastructure; and
- Problems with Russian-Chinese management in the Amur basin and Russian-Kazakh-Chinese management in the Irtysh basin.

These challenges make it difficult to find effective solutions within the framework of regional negotiations: in the first case, the problem should be addressed at the fed-

eral level and dialogue should be held with Kazakhstan in light of the increase in transit flows via the Trans-Siberian Railway and the development of new export routes. In the second case, the issue is competition within the EAEU and harmonization of nontariff barriers with respect to EAEU members by China. The third case is an example of China's approach to managing international water basins.

External factors that may have a decisive influence on the quality of the EAEU's dialogue with Asia-Pacific countries on transport and logistics issues and, accordingly, on Russia's participation in such projects include the rate and geography of China's economic growth, prospects for China's trade and economic cooperation with Asian countries, the EAEU and the United States, and finally, the degree of trade liberalization in Asia and between Asian countries and foreign partners, including Russia. The key internal factor is the level of authority for the EAEU to develop a common transport agenda.

Currently, the EAEU is holding or planning to hold trade liberalization negotiations with Korea, Singapore and India. Regarding China, Moscow and Beijing are finalizing the text of a non-preferential trade and economic agreement. There is a basis for dialogue in the field of infrastructure with all these countries.

Regarding Korea, the situation is the most promising and, at the same time, the least stable due to a crisis in relations between Seoul and Pyongyang. Korea, which launched its own Eurasian initiative in 2013, is not involved in the EAEU transport agenda in any way and the transport agenda was not discussed at the level of preliminary studies on the feasibility of a free trade area.

The existing political conflicts between the two Koreas do not yet allow optimistic forecasts about prospects of a trans-Korean railway (the main project within the framework of the Korean Eurasian initiative), but in the future this project may have a positive impact on the region's development – through sea ports and transit by rail. Moreover, the visit to Moscow of a special envoy of the new president of Korea, Moon Jae-in, in August 2017 was devoted to a return to the Korean "solar heat" policy which provides for the development of trans-Korean projects.

Singapore may in the long term become a key investor in Russia's transport infrastructure. Singapore's Changi Airports International already participates in the development of Knevichi Airport. There are good prospects for attracting Singaporean partners to participate in the extension of Russian sea ports in Primorsky Krai and, especially, the development of the Northern Sea Route infrastructure. Russia is interested in linking these issues to the trade liberalization issue in the framework of an EAEU-Singapore dialogue.

Regarding India, we can expect that free trade area negotiations with it, announced in June 2017, will discuss a North-South international transport corridor among other transport/logistics issues. This proposed corridor would pass across Russia's European part, the Caucasus or Kazakhstan, Iran and the Arabian Sea to reach Mumbai. It is important that this project, to which Russia, India, Armenia and Kazakhstan pay priority attention, does not disorient Indian businesses regarding prospects for Siberian and Russian Far Eastern exports. There is a risk that the corridor project will reduce partnership between Russia and its regions in the European part. This is why it is important

that the FTA negotiations discuss the corridor agenda in conjunction with trade and investment cooperation between India and Russia's trans-Ural regions, primarily the Russian Far East which can conduct sea trade with India.

In the short term, it seems expedient, within the framework of the Commission's existing powers, to closely link the transport agenda in the dialogue with China to other negotiation issues, primarily nontariff barriers and information exchanges. In starting negotiations with India and Korea, this is also a required condition for integrating the Russian transport system into the transport/logistics network of the Eurasian region. Otherwise, there is a high risk that transport projects will be discussed without assessing direct trade effects of their implementation.

The example of a grain terminal project in the port of Zarubino – given the existing ban in China on the import of Russian Far Eastern wheat, unstable phytosanitary standards in India and protective duties and quarantine for imported wheat in Korea – confirms the high dependence of transport cooperation between the EAEU and APR countries on broader frameworks for trade regulation.

In the medium term, the Eurasian Economic Commission will likely seek to increase its authority and transfer the transport agenda to the level of supranational regulation: this is the only way to fully tap the transit and export potential of the EAEU countries. However, this process may take three to five years.

The EAEU does not participate, either, in attracting funds from international development institutions, including the Asian Infrastructure Investment Bank, the BRICS New Development Bank, and the Silk Road Fund. The Eurasian Economic Commission is not represented in these institutions, although the implementation of some infrastructure projects in the region will a priori require supranational regulation and, possibly, management. A closer dialogue between the Commission and regional development institutions is another condition required for effective implementation of the EAEU's infrastructure agenda.

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Создание общей инфраструктуры Евразии: повестка для Евразийского экономического союза[1]

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Статья посвящена анализу тенденций развития транспортной инфраструктуры Евразии в контексте экономической и политической интеграции стран континента. После глобального финансового кризиса 2008–2009 гг. ведущие государства Азиатско-Тихоокеанского региона (АТР) выступили с предложениями о крупномасштабных инфраструктурных проектах на евразийском пространстве. Россия крайне заинтересована в интеграции в эти инициативы, однако сталкивается с рядом сложностей. Некоторые из них связаны с особенностями регулирования транспортных вопросов в рамках Евразийского экономического союза.

В статье анализируется текущий диалог в области развития инфраструктуры с государствами АТР, в том числе в рамках инициативы сопряжения Евразийского экономического союза и Экономического пояса Шелкового пути. Рассмотрены основные инфраструктурные инициативы на евразийском пространстве, представляющие потенциальный интерес для формирования комплексной инфраструктурной повестки ЕАЭС, а также определены основные вызовы и возможности для России, возникающие в рамках взаимодействия ЕАЭС и стран АТР в области инфраструктуры.

Авторы приходят к выводу, что для интеграции России в евразийские транспортно-логистические инициативы необходима увязка транспортной повестки с вопросами регулирования торговли и инвестиций. Для этого требуется тесное взаимодействие с Евразийской экономической комиссией, а в перспективе – и вовсе передача компетенций, связанных с развитием инфраструктурной повестки ЕАЭС, на наднациональный уровень.

Ключевые слова: Россия; Евразия; инфраструктура; сопряжение; ЕАЭС; транспорт

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