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## **THE SCOPE OF CHANGES IN THE ECONOMIC SECTORAL POLICIES OF THE RUSSIAN FEDERATION, AND THEIR IMPACT ON THE RUSSIAN BALTIC ACTIVITY, THE CASE OF TRANSPORT POLICY**

### **ABSTRACT**

The following paper covers the policy of the Russian Federation (RF) on maritime transport in the broader context of the strategic regulations on transport. On the one hand, the strategic regulations of the Russian Federation on the development of transport were brought closer. While on the other hand, the focus was on the maritime transport issues of the RF in the Baltic Basin, and the implementation of the transport strategy between 2008-2019 in the context of the Russian maritime policy activities, with a particular focus on the Baltic Sea.

Key words:

maritime transport, strategy, Russian Federation, Baltic Sea

### **INTRODUCTION**

The sectoral economic policies of the Russian Federation in the field of transport policy are based on the primary documents adopted within the last twenty years, i.e. the *Transport strategy of the Russian Federation for the period up to year 2020*, introduced by regulation No 45 of the Russian Federation Ministry of Transport from May 12 2005. But also the *Transport strategy of the Russian Federation for the period up to the year 2030*, introduced by the regulation No 1734 of the Council of Ministers of the Russian Federation from November 22 2008. Slightly earlier, but about parallel to the latter document with the regulation No 877 of the Council of Ministers of the Russian Federation from July 17 2008, introduced the *strategy for the development of the Russian Federation Rail Transport up to the year 2030*. The implementation of

the reform of transport in the Russian Federation was followed in advance by the guidelines contained in the document entitled “Modernising the transport system of Russia in the years 2000-2010”, or the one adopted on October 05 October 05 2001 under the RF government regulation No 848, “The Transport system development Programme of Russia (Years 2010-2020)”.

The analysis of the available literature indicates that in the context of the transport strategy of the Russian Federation so far it has been dealt with the development of transport after the dissolution of the Soviet Union, for example in a study titled (German) *Probleme der Strukturellen Transformation des Postsovietischen Raumes – Problems of structural transformation in the post-Soviet area* (Vardomski et al. 1997). It was also considered the impact of the Russian Federation’s membership on the Eurasian Economy Union (EAEU) on the functioning of the economy, including its transport policy (Lüzinger, 2016). There are more publications on this topic: (German) *Analyse: Eurasische Union – Alte Integrationsidee mit neuem Namen* (Hoffmann, 2012). The prescription of activity of the Russian Federation in EAEU can also be found in (German) *Eurasische Wirtschaftsunion vom gemeinsamen Markt für Transportdienstleistungen bis 2025* (Wolf, 2017). The most attention is paid to the railway transport of the Russian Federation (for example, *The development of international transport corridors in the transport policy of the Russian Federation*, (Demjaniuk, 2011: p. 1019-1027). However, more studies relate to the importance of seaports (especially in the Baltic Sea and in the Arctic Region), and maritime transport to the economic interests of the Russian Federation (for example, *The Baltic Sea is of increasing importance for Russia*, (Alekklett, 2014). An analysis of available literature reveals many studies on the development of the Russian Federation’s maritime transport strategy. The texts range from euphoric publications extolling transport growth to those indicating concern over the increased activity of the Russian Federation in the Arctic, which may lead to an escalation of threats to international security. Russia’s achievements in the field of transport are presented in such texts as *Throughput of Russian seaports in 3M 2019 grew by 4.7 to 201.8 million tons of cargo* (“Port News”, 14.04.2019); *Boom times for Russia’s Arctic ports* (Staalesen, 25. 01. 2019), *Warming revives dream of sea route in Russian Arctic* (Krameroc, 2011); *China and Russia collaborating on arctic port* (Buxbaum, 10.01.2018). There are also scientific studies, such as *Formation of the cargo base of Ust-Luga port with allowance of the principles of integrated logistics* (Panova et al. 2016); *Benchmarking of Russian ports* (Kharchenko, 2013), or *Policy environment analysis for Arctic seaport development: the case of Sabetta* (Gritsenko, 2017). More and more analyses focus on the importance of the Baltic Sea, and maritime transport in this area for the economic interests of the Russian Federation. Not only because of the 51% (2018) of container throughput in Russia using the Baltic seaports (*Key Russian gateways WWW*). At the same time, the threats posed by RF’s maritime policy

are indicated among others like in the text *Russia Is Dominating the Great Arctic Game, Is a Real Cold War Heating Up in the Arctic?* (Hunter, 2018). Although this could be a topic of another research.

The purpose of this study is to present the results of the analysis of the development of maritime transport of the Russian Federation, with particular emphasis on the Baltic Sea, taking into consideration the broader background of the strategic rules on transport. The methodology of the carried out studies is relatively straightforward, and is based on the analysis of documents and activities of the instances of decision-makers, as well as current data on transshipments in seaports. For the purpose of the research, the following thesis was adopted: a centrally controlled economy enables the Russian Federation to develop maritime transport on an unprecedented scale.

## **1. The strategic regulations of the Russian Federation on transport development**

The mentioned above strategic document from 2005 was preceded by preparatory work. On October 10 2004, the Russian Federation started the project to develop strategy of the *Russian Federation transport for the period up to the year 2010*. It was finally released on January 31 January 31 2005. The strategy itself was included on 42 pages of text. In Appendix 4 to the above-mentioned project (*Characterisation of priority projects of the transport segment development*) in step 7. (*Construction of seaports*) indicates the complex development of four ports, including three Baltic Sea ones (Project of Transport development strategy... 2005, p. 63-64). The above mentioned construction applies to, among others, the commercial seaport of Ust-Luga<sup>1</sup>. The port was to be developed in terms of the possibility of transshipment of bulk cargo, such as coal and other minerals, wood and general cargo, perishable loads, cargo in containers, loads expedited on ferries, and liquid cargo (in quantities up to 34 500 thousand tonnes per year). The budget of the project was to be 29.9 billion roubles, and it aimed to launch efficient and high-throughput port terminals for the handling of bulk goods (mainly coal and minerals) on high-capacity vessels (above 30 tons). This was intended to reorient the handling of Russian cargo from foreign ports to Russian ports. In the above-mentioned document, it was also pointed to the construction of a specialised maritime commercial port in Primorsk<sup>2</sup>. It would serve the transshipment of crude oil and refining products, with target transshipments of 106 000 thousand tonnes per year. The value of the project was evaluated at 14.54 billion roubles. The aim of the project was to redirect crude oil streams, and its products from the ports of the Baltic States to

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<sup>1</sup> Ust-Luga – seaport located in Kaliningrad Oblast 110 km from St. Petersburg.

<sup>2</sup> Primorsk – seaport located in Kaliningrad Oblast, 10 km in North of Baltiysk.

Russian ports. The construction of the passenger terminal on the Wasiliewska Island (St. Petersburg) was also planned. Ultimately, the terminal was supposed to provide support for 1200 thousand passengers annually. The project was evaluated at 37.3 billion roubles. Its purpose was to enable the handling of large cruise ships, and passenger, as well as car ferries, including the dedicated before mentioned service, and hotel facilities. In addition to the mentioned infrastructure, the project indicated the construction of a total of 72 logistic terminals (with a total transshipment potential of 100 800 thousand tonnes of goods per year) located in each RF administrative unit, including three in the St. Petersburg Region. The annual transshipment clearance of each terminal was to be from 400 to 2500 thousand tonnes. The value of the project was assessed at 53.9 billion roubles (Project of Transport development strategy... 2005: p. 65).

The mentioned strategy (in the project) also included a plan of projects for its implementation (Project of Transport development strategy... 2005: Annex 5, p. 66-78), including, in addition to projects for increasing transport capacity, projects targeted at the development of the transport system. The above-mentioned project was changed in Regulation No 45 of the Ministry of Transport of the Russian Federation from May 12 2005, concerning the *Transport Strategy of the Russian Federation for the period up to the year 2020* (Transport strategy... 2005). The First Amendment has already occurred on January 01 2006. The original form on 78 pages identified the mission, and strategic goals of the development of the transport system, the main orientations of the state's transport policy, the main orientations of the structural transformations of each transport branches, the main directions of the shaping of the transport network structure, and infrastructure development of individual transport branches, as well as the stages and mechanisms of transport strategy implementation. Interestingly, (albeit due to the lack of availability due to confidentiality of the document) it would certainly be included in the above mentioned Strategy – *Security priorities in the RF transport strategy*.

Extensive, posted on 31 pages of the document (containing 78 pages altogether), and published in the second chapter of the main directions of the strategy for explaining the main policy directions of the state's transport policy concerns: the major rules of the national regulations of the transport services activity, the development of the transport services market, the development of transport infrastructure, Russia's position in the global transportation services market, the development of transport technique, and transport technologies (including the development of equipment production), and harmonisation of the transport system, and the increase of its reliability. Chapter three of the document provides the main structural directions of the individual transport branches. In the context of maritime transport, there are indications (chapter: *Development and reformation of maritime transport*) to the fact, that maritime transport has a major impact on the development of the internal market and

thus on the economic development of the RF entities, and the achievement of geopolitical, economic, and social goals. The state policy on maritime transport is intended to focus on the implementation of the *Maritime doctrinal concept of RF politics in terms of the fleet*, as well as the maintenance of the merchant fleet, and port infrastructure guaranteeing economic independence, and state security. It is associated with the shorting of transport links, increasing the volume of internal trade, and thus cabotage (inland shipping) operations, but also cargo transit. It is also to ensure social security, and favourable working conditions for floating crews (complying with international standards). It also draws attention to the fact that maritime transport is carried out mainly in the field of intercontinental services (hub), which is linked to competition on the market for such services. This transport competes with internal water transport (small and large cabotage), but also with import-export shipping. In this context, the increase in numbers, and tonnage of the commercial fleet under the RF flag would be possible with ensuring the competitiveness of Russian ship-owners on the global freight market. This was achieved by intensifying of the activity<sup>3</sup> of the Russian Maritime Register of Shipping. The competitiveness of national shipping infrastructure depends both on the competition of stevedores in the area of one port, and on the competition of such companies in one sea basin. This competitiveness is to be achieved by the reform of the management system for sea trade ports in the early nineties. An example is the creation of an *Administration of maritime commercial ports of the Baltic Sea (Administration WWW)*. It aims, among others, to decouple administrative, and ownership spheres from economic ones, to increase investments directed towards the infrastructure development, and to safeguard the balance between the interests of the state, consumers of services, and their representative organisations and to ensure the continuity of the transport process. The mentioned document also indicates the development of yacht ports. For the achievement of the objectives mentioned above, it is required, among others:

- to implement the operation of the seaport administration in the interest of ensuring safe shipping, and order in ports, as well as in the Russian zone of responsibility (territorial waters, internal waters, exclusive economic zone);
- to launch regional vessel traffic monitoring systems;
- to increase the efficiency of the functioning of the State property (without the possibility of privatisation) of seaports, and the completion of a functioning database of legislation;

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<sup>3</sup> Since 1973 the Russian Maritime Register of Shipping has for three times been the Chairing Society of IACS (The International Association of Classification Societies).

- to ensure favourable conditions for the functioning of ports, and increasing their competitiveness both on the Russian, and international markets, including tariffs not exceeding those established by world monopolists.

The importance of transport for the economic policy of the Russian Federation is testified by the statement of the Undersecretary of Transport<sup>4</sup> Igor Lewitin in the context of regional planning aspects for the realities of transport strategy in Russia. He spoke in June 2006 in Kazan, at a joint meeting of the College of the Ministry of Transport of the Russian Federation, and the Government of the Republic of Tatarstan (Shared meeting WWW). He referred to tasks under the implementation of regional transport strategies of the Russian Federation for the period up to 2020. I. Lewitin referred to the speech of the Federal Assembly of the President of the Russian Federation Vladimir Putin. The President identified the development of transport infrastructure among the most important challenges for the Federation, the state of which cannot be considered optimal, and the level of its development differs from the level of development of transport infrastructure on an international scale. Therefore, it is necessary to adapt it further while ensuring decent working conditions within market relations. At the same time Minister Lewitin pointed (referring to the strategic document created in 2005, under which work was completed) to the development of the transport strategy of the Russian Federation for the short term period until 2010 (first stage), and until 2020 for the long term. Noteworthy is the summary of the then Minister, who indicated that these regulations were made concerning the system as a whole, and for individual transport branches, where a complex system of priorities was adopted, and directions of their implementation within individual transport branches were determined, taking into account their specificities. Mister Lewitin emphasised, that although the findings of the above-mentioned strategies relate to the development of every single branch of transport, this occurs in the context of the development of industry, and the national economy as a whole. From the above mentioned emerges a common, and uniform vision of the role of modern transport from the perspective of the development of its management, taken at various levels of legislative activities, as well as the interests of users of business transport services, and all sectors of the social sphere. The implementation of the strategy had to ensure the achievement of uniformity in the level of development of the transport infrastructure, for the evolution of a balanced development (in the Russian nomenclature – unity) of economic space. This implementation had to result in an accelerated turnover of goods, lower unit costs of transport in the economy, as well as completion of works, to ensure consistent support for the transport network. At the same time, in the absence of breaks in the exchange

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<sup>4</sup> Currently (2020) acting Minister of Transport of RF is Ewgenij Ditrich.

of loads and goods, as well as eliminating disparities in the development of the transport system within individual regions of the country. The Minister stressed that it would not be possible to develop further rules, take action, and therefore to implement a strategic transport strategy without ensuring harmonisation (in the interests of the strategy) of regional policy. In this context, the development of transport as the driving force of the region's economy not only meets the needs of the economy, and population in transport, but also serves as the main basic material for the socio-economic development of the region. This means that the economy, and society generate needs for the transport system, while the latter (proper transport) provides the opportunity to build more efficient economic space. However, due to the cost-intensive nature of transport, network integration in the form of a reliable system as a whole is becoming an increasingly important aspect of the task of creating regional foundations for transport and communication. It will provide consumers with transport services in the shape of the minimum guaranteed standard of convenience, and cost-effectiveness in realising (all possible) connections.

The implementation of the transport strategy is accompanied in the Russian Federation by supplementing its provisions with details, and reporting on its development and related implementations (including regional ones). An example of this is the statement of the deputy minister of transport of the Russian Federation Alexander Misharin entitled "Regional tasks of implementing the transport strategy of the Russian Federation for the period up to the year 2020". He stated, that taking into account the results of 2004-2005, on the basis of the socio-economic development program of the Russian Federation in the medium term, as part of implementing the main provisions of the strategy, the ministry responsible for transport developed a system of priority actions for medium-term periods, and the number of resources that should be consumed to achieve the planned results (Shared meeting WWW). According to the deputy minister, the introduction of modern logistical technologies should ensure, that the proportion of transport costs in the final cost of Russian production, which amounted to 15-20%, should decrease to 9-12% (in developed countries this factor amounts 8%). That is why the funds for the implementation of strategic goals in 2006-2008 came in 97% from the federal budget. For example, as part of the purposeful federal program Modernisation of the Russian transport system (2002-2010)" the total amount of funds included 163 trillion roubles. However, it was simultaneously assumed that, as a next step, for 1 roubles from the federal budget, 0.8 roubles from the budgets of the constituent units of the Russian Federation, and 2.2 roubles from non-budgetary funds/sources will be used. The new venture was a subprogram Development of export of transport services. In the early 2000s, it was implemented by preparing and conducting research. According to the assumptions, they were financed from the federal

investment fund. 1 billion roubles were allocated to projects of this sub-program (Shared meeting WWW).

Another strategic interpretation in the field of transport in the realities of the Russian Federation is the *Transport strategy of the Russian Federation for the period up to the year 2030* introduced by Regulation No 1734 of the Council of Ministers of the Russian Federation of November 22, 2008. Developing its final shape was preceded (as in the case of the previous one) by the development of a transport strategy project of the *Russian Federation for the period up to the year 2030* (Regulation 2008/1734), which was included on 183 pages. The sheer volume of the document compared to the previous strategy adopted in 2005 (which was only 78 pages) is an evidence of the appreciation on the importance of the problems raised in it. This is also evidenced by the date of introduction of the new strategy (it was introduced three years after the introduction of the previous, without waiting for the achievement of the previously adopted time horizon, i.e. the year 2020. The said project was published in September 2008. The project itself has an introduction, eight substantive chapters, and six annexes. Traditionally, the most comprehensive parts of the latest strategy are chapters regarding the development tasks of the Russian Federation transport system for the period up to the year 2030 (63 pages), and the stages of development of the transport system (42 pages). It is also significant that in the new strategy (from 2008) the individual transport branches are not dealt with separately, but the transport system is treated as a whole.

Summing up the years 2000-2007, the transshipment of goods in the seaports of the Russian Federation took over during the above mentioned period over 451 million tonnes, which meant an increase of 2.6 times. Comparing to the results achieved in the Soviet Union in 1989 (refers to transshipments in all seaports of the USSR) this meant an increase in maritime transport by 12%. Meaning that, with the participation of seaports, approximately 60% of the internal cargo turnover of the RF is supported. The finances invested in the years 2000-2007 in the development of the RF transport system covered 1.93 trillion roubles. The federal budget covered 27.7% of the value. The majority of inputs was invested in rail transport (27.1%), and in road transport (57.4%), which gives a total of 84.5% of inputs. This means, that the clear priorities chosen did not relate to maritime transport. Taking into account the early start of the reforming the transportation system; it should also be noted that the non-state transport sector in the field of transport companies began to dominate. This was the case at that time in road transport 94.9% of cargo, and 18.5% of passengers' carriage. In maritime transport, 88.4% and 97.3% respectively. In inland waterway transport 97.7% and 90.4%, as well as in air transport respectively 87.1% and 77.8%, while in cargo transport by rail 85.6% (Shared meeting WWW). Since 2008, the implementation of 13 major infrastructure projects, which are implemented under public-private partnerships with the



main participants of the state (chapter of the strategy from 2008 – *RF Investment Fund*), has begun. This also applies to the renewal of the transport park. The authors of the strategy dwell mainly on road infrastructure, and air navigation, mentioning inland waterways. In the context of maritime transport in the illusory (only 8 lines of text) summary of the state of maritime transport at the time, it is hard to look for a deeper analysis. The authors of the strategy point only to the uneven development of Russian seaports, particularly in terms of accumulations of significant differences in technological level, and capitalisation of port nodes, resulting in inequality and instability of the port base. It is valid respect to communication connections of ports with other branches of transport (rail, road, pipeline), as well as shortcomings in terms of capacity for the storage of goods and on-port logistic terminals. The port capacity deficit was primarily related to the possibility of transshipment of imported goods (containers and cargo handled in a horizontal transshipment system<sup>5</sup>), while the port capacities for export cargo were previously developed. However, for this analysis, the findings in chapter IV of the Strategy are most valuable *Strategy goals and priorities for the development of transport in the long term*, and those contained in chapter V, i.e. *Development tasks of the Russian Federation transport system for the period up to year 2030* (Regulation 2008/1734: p. 27 – 42).

## **2. Russian activity in the field of maritime transport policy, with particular emphasis on the Baltic Sea**

In terms of tasks (the strategy indicated 8 of them) for the development of the transport system of the Russian Federation for the period up to the year 2030 first appears the formation of a single transport area, on the basis of balanced development of transport infrastructure. In this regard, in the case of maritime transport, it has already been pointed out, that (Regulation 2008/1734: p. 56) it is indispensable to develop the capacities of seaports, including the development of provisions for increased transshipment of goods. The year 2015 was the first time horizon outlined in the 2008 strategy. Regarding the development of maritime transport, tasks have been set for implementation in all the seas and oceans surrounding the Russian Federation, i.e., in the North Basin, in the Baltic Basin, in the Azov-Black Sea Basin, as well as in the Caspian, and in the Far-Eastern Basins. In the Baltic Sea, this meant the development of infrastructure of facilities located on the waters, and in areas that are subject to federal liability, i.e. in the seaports: St. Petersburg, Wysotsk<sup>6</sup>, Ust-Luga, and the ports of Wyborg<sup>7</sup> and Kaliningrad. It also included the construc-

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<sup>5</sup> To roll on – to roll of (Ro-Ro).

<sup>6</sup> Wysotsk is a town in the Leningrad Oblast, Russia. 159 km northwest of St. Petersburg.

<sup>7</sup> Wyborg is a town in western of Russia, in the Leningrad Oblast, lying on the Karelski Isthmus, on the Gulf of Wyborska, at the entrance to the Canal Saimianskij.

tion of new transshipment complexes in the ports of the above-mentioned pool, including for securing the operation of the pipeline system in this area, and for opening up the passenger terminal in St. Petersburg, which was meeting the modern requirements. The second time horizon of the strategy covers the years 2016-2030. The centre of gravity, in this case, is the development of ports located in the Northern, and Far Eastern basins, with particular emphasis on the so-called North Eastern Passage. It is related to the exploration, and exploitation of hydrocarbon deposits discovered there.

In terms of the second task outlined, i.e. securing the availability, scope, and competitiveness of transport services for the outsourcing of such services adequate to the needs of innovation-based federation development is demonstrated the necessity (in the context of competitive transport, and maritime services market) to increase the capacity of both ports, and the merchant fleet (Strategy... (2008): p. 64). This is to be achieved in terms of quantitative and qualitative indicators. In the latter case (qualities), the planned increase is expected to concern the handling of Russian export, import goods, and transit goods, but also the increase in the potential of the internal commercial market, and a significant increase in the scope of export of transport services. This is to be done under the conditions of tariff regulations, which in the long term, should allow compensating for losses associated with existing monopolistic phenomena. At the same time, the second stage is to depart from the tariff regulations for loading and unloading of goods carried by sea. It is noteworthy to indicate in the implementation of these tasks, the phenomenon of multimodal transport, in the context of interoperability of all transport branches (Strategy... (2008): p. 65).

The third task outlined in this strategy is to ensure the availability, and quality of transport services in the context of the increase in social standards of citizens. The creators of the strategy dwell on several pages of the text about these issues in connection with road and rail transport, while only few lines of the text were devoted to the maritime transport (as indicated earlier). There is a need to increase the scale of cargo, and passenger transport on routes that are important from the social point of view. The Far North is mentioned in this regard (the North-East Passage has to play an important role here), and the Far East, but also supply ties of the Kaliningrad Oblast, and its passenger communication (Strategy... (2008): p. 72).

Integration in the scope of the global transport area, and the use of the national transit potential is the fourth task described in the strategy (Strategy... (2008): p. 73-82). The way to the aforementioned integration is to be, first of all, cooperation within the Eurasian Union, the European Union, and bilateral agreements including representing the interests of the Russian Federation in the above-mentioned organisation activities, and the development of international transport corridors. The intention of strategy originators is, that

in this regard the development of export transport services is to be treated equally with the export of goods. As part of the above tasks in the field of international maritime transport, it is expected in a very short period of time (Strategy... (2008): p. 80-81) only to conclude new bilateral agreements, and renegotiate international agreements concluded in the times of the USSR, as well as to modernise the standards developed at the same time. The process of extending and updating bilateral agreements should follow the regulations developed by the World Trade Organisation (WTO<sup>8</sup>).

The fifth task concerns ensuring transport safety. This means, according to the creators of the strategy, primarily to ensure the safety of land vehicle traffic, aircraft and sea, as well as river vessels. It means at the same time also ensuring the operation of specialised search and rescue services working together with several ministries (especially: national defence and emergency situations). And also by: ensuring the safety of transport facilities against unauthorised external interference, ensuring the safety of the transport of dangerous goods, licensing of personnel (aimed at the admission of qualified persons to work in the sphere of transport), the development of transport supervision measures and systems, and ensuring smooth management of professional preparation. In this context, it is important to emphasise the distinctive qualifications of the executive officers of the ministry of transport itself. The strategy (as part of the task mentioned above) devotes a lot of space to the safety and security of maritime transport (Strategy... (2008): p. 92-94). The way to do this is:

- entering the necessary number of security vessels (rescue, hydrographic and others) into service;
- organisation and maintenance of vessel monitoring systems (within the existing international system);
- increasing requirements for ships safety already at the stage of their construction, as well as during their operation;
- improvement of technical equipment for performing of state surveillance of sea shipping;
- increasing the level of safety of facilities, and means included in the maritime transport system;
- securing the maritime transport infrastructure against acts of unauthorised access through the preparation, and use of specialised equipment.

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<sup>8</sup> Russia joined the WTO on December 16, 2011.

Accordingly, it is foreseen:

- the construction and reconstruction of ship traffic management systems, global communication system facilities, and the international satellite search and rescue/alert system to ensure safety at sea, including port approaches to the seaports of the Russian Federation, and on the routes in the Arctic (i.e. previously mentioned North-East Passage);
- construction of safety fleet vessels (icebreakers, hydrographic ships, and those conducting nature protection tasks), as well as homing facilities for search and rescue service managers, organised in individual sea basins, and preparation of mobile equipment for deep-water rescue.

Therefore, until 2015, the construction of 90 above-mentioned vessels was completed. On the other hand, in the years 2016-2030, it is planned to continue the construction of similar units and modernise older ones (atomic and conventional icebreakers, rescue vessels, hydrographic ones, etc.). The needs in this regard are set at 340 vessels. They were further specified in the strategy.

The strategy also includes guidelines on counter-terrorism protection, which provide for:

- forming a maritime safety system in the Russian Federation corresponding to the guidelines of the International Maritime Organisation, and integrated into the global and European system;
- full use of technical conservation measures in seaports;
- the introduction of technology, and projects envisaged and developed under the IMO<sup>9</sup> convention on ships;
- development of an information system for use in the context of maritime<sup>10</sup> safety;
- increasing the level of interoperability in maritime safety between subjects in maritime activities, and the enforcement authorities/bodies of the Federation;
- preparation of professional personnel associated with the assurance of maritime safety.

The sixth task concerns the reduction of the negative environmental impact of transport. In the case of maritime transport, this means putting into operation the necessary number of vessels (among others: for the elimination of pollution/spills), and indicating to the shipping companies the necessity of

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<sup>9</sup> It's about the so-called SOLAS (Safety of life at sea) Convention.

<sup>10</sup> It's about the system. SafeSeaNet and peripheral systems.

exploiting vessels for the transport of crude oil, or its products with a double plating, and no longer than 15 years.

As part of the seventh task (development of transport technology, technology and IT security), the construction of 144 ships with a total capacity of 6.2 million DWT<sup>11</sup> was foreseen (until 2015). In turn, the years 2016-2030 are intended to bring the construction of another 397 ships (19.5 million DWT). In 2030, the total tonnage controlled by the Russian Federation of Transport fleet is to count 38.9 million tonnes. 70% of this tonnage is to be registered under the flag of the Federation, and include units of different destinations such as gas, tankers, and tankers for petroleum transportation products, bulk carriers, wood carriers, container ships, as well as ro-ro, and combined ones (Strategy... (2008)). In order to safeguard the growth of cargo and passenger transport (in order to better connect, among others the Kaliningrad Oblast with the country), construction of cargo-passenger ships is planned.

The regional aspect of the development of Russia's transport system (task eight) includes in the Baltic Sea region (part of the North Western Federal District) the construction of a road connection from the M-11 "Narva" road to the commercial port of Ust-Luga, as well as its communication by road with Novgorod. This task also encompasses the reconstruction of objects under state management in the seaport of St. Petersburg. This applies in particular to: the main port channel and the port aquatory along with the quays. There was also a maritime passenger terminal to be built in this port (Vasilevska Island) including reconstruction of the part of the approach farwater, along with safety and navigational security systems. It also planned reconstruction of the quays, and dredging work in the port area, and approaches to it for the development of the a coal terminal in the port of Wysotsk. The plans also included the reconstruction of infrastructure facilities in the port of Wyborg and the development of Ust-Luga port (formation of the area of its southern and northern parts, including the container terminal, and the construction of specialised quays). The task also concerns the deep-water port of Baltiysk, and the construction, or reconstruction of the port terminals in Kaliningrad transport node/transport junction, as well as reconstruction, or construction of terminals securing the work of the Baltic pipeline system (including parking spaces, or sea terminals). This also applies to the infrastructure related to fishing operations (including in the seaports of Kaliningrad and St. Petersburg), but also to the preparation of port logistics infrastructure, including container terminals, storage areas for goods, and logistic centres. The scope of the reported construction and modernisation projects indicated, that in the field of maritime transport, the Baltic seaports became in 2008 a priority in the expansion of the Russian transport

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<sup>11</sup> The so called deadweight tonnage (the English tonne corresponds to 1016 kilogram).

system. Between 2026-2030 further development and reconstruction of the Baltic ports of Primorsk, Wyborg, Wysotsk, Ust-Luga, Kaliningrad, and Baltiysk is planned in the North Western Federal District.

### **3. Implementation of the transport strategy of the Russian Federation**

The implementation mechanisms described in chapter six of the strategy (Strategy... 2008: p. 138-207) include, on 69 pages: preparation of the database in the form of legal acts and standards; organising an effective system for directing the implementation of the strategy; the development of the scientific, technical, and technological base of the transport complex; as well as provision of labour force, also federal, and regional implementation programmes. In the context of the latter, the first stage of implementation of the strategy meaning till 2015 (Strategy... 2008: p. 194), the federal programme "Development of the transport system of Russia (in the years 2010-2015)" was envisaged. It included five sub-programmes for each transport branch, i.e. rail transport, roads (draws attention to road orientation – no definition of car transport is used), sea transport, internal water transport, and civil aviation. Moreover, there is one more sub-program (functional), regarding the development of export of transport services. It should be noted that above-mentioned strategic planning did not emerge in a kind of vacuum, but it was a continuation of earlier intentions. For example, the above-mentioned programme Development of the Russian transport system (within the years 2010-2015) was a detailed description of the earlier programs, i.e. Program from the 16 of February 2001 – of Modernisation of the transportation system of Russia in the period 2002-2010 (Regulation 2001/232), and further Program from 2001 approved by the then head of government Mikhail Kasyanov (Regulation 2001/848). Moreover, it was continued in the following years (2015-2030)<sup>12</sup>, i.e. in the second stage (the years 2015-2030) it was envisaged, that the basic mechanism of implementation of Russia's transport strategy would be to implement targeted transport system development programs over five-year periods. At the same time, their subprograms were limited to two functional ones, and one branch one. Firstly, the achievement of the main strategic indicators (general-economic, general-social and transport-wide), and secondly, the sub-programmes related to taking action of the main implementation mechanisms of the strategy. Thirdly, there

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<sup>12</sup> In years: 2006 (Regulation No 338 of 31 May), 2007 (Regulation No 437 of 09 July), 2008 (Regulations No 258 and 377 respectively of 10 April and 20 May), 2009 (Regulation No 236 of 17 March), 2010 (Regulations No 828 and 1076 respectively of 12 October and 21 December), 2011 (Regulation No 293 of 18 April), 2012 (Regulations No 1224, 1273 and 1426 respectively of 26 November and 10 and 27 December), 2013 (Regulation No 401 of 05 May), etc.

were the sub-programmes aimed at achieving the main target indicators for transport strategy carried out in the transportation sectors, i.e. transport by car, rail, sea, inland waterway, and air (Strategy... 2008: p. 194). As part of these sub-programs, it was pointed out: to form a single national transport area, improving and building a new transport infrastructure (integrated transport and warehousing and freight-transport complexes), to ensure the development of technical and technological parameters of international transport corridors, to develop minimum transport social standards, and to develop models that are common to all branches of transport, technologies and standards, as well as a normative legal base, and methods of state regulation.

As part of the above implementation mechanisms, the risks involved are also being considered. For example, for maritime transport, established strategic implementation risks resulted from the deficit of potential of seaports, and storage terminals. In this context, the most unfavourable scenario for the development of the situation would be to remain in areas in terms of infrastructure, which would mean breaking the strategic development i.e. implementation of the outlined strategy. This may occur (in the case of sea transport) as a result of unfavourable geopolitical development, which could reduce shipping, and keep the underdevelopment of the capacity of seaports (Strategy... 2008: p. 197). It was also concluded that the efforts undertaken, to integrate the Russian Federation with the international transport system, largely depend on the stable political situation in the neighbouring regions. However, operational risks arise, according to the creators of the strategy, from deficiencies in management, and its procedures. Low wages in transport also contribute to this.

When implementing the strategic guidelines established in 2008, a periodical assessment of the degree of implementation has been made, is being carried out, or will be made. According to the indicated stages, i.e. until 2015, and in the years 2016-2030. The first stage of implementation was based on the results of the target program "Modernising the transport system of Russia in the years 2002-2010" based on the targeted program, entitled "The development of the Russian transport system in the years 2010-2015", as well as other existing/ongoing programs. The tasks indicated in this connection were directed at accelerating trade in goods and reducing congestions and increasing the availability of transport services. A special role in those mentioned above should play the development of road transport, and passing capacity at the borders of the Federation. The main course of action during this stage was (in the case of sea transport) not only to increase the transshipment capacity of Russian seaports, and the transport capacity of the merchant fleet, but also its renewal, and increase in the transport of cargo, and passengers on routes important from the social point of view (Strategy... 2008: p. 201). The next stage was to bring the competitive transport market to launch, which should be the basis for economic development. It was also intended to ensure reaching an

international level in the field of technical, and technological development of transport. It was also foreseen, that the appropriate reserves should be created, and the transport network has to be expanded. This was to be done in cooperation with the Eurasian Union, and other countries. In addition, the diversification of hydrocarbon exports, and the increasing of the role of logistics and transport infrastructure were also pointed out. This was to bring together with the creation of a single national transport system, which had to achieve a level enabling the elimination of the infrastructural restrictions of the socio-economic prospects of the country's development. In the field of sea transport, this has to mean increasing the capacity of Russian seaports, and the efficiency of their work, while coordinating this with the creation of a logistic system including import seaport terminals (for various purposes), as well as terminals in the main national transport hubs (including the so-called "dry ports"). This also means an increase in the capacity of the trade fleet registered in the Federation.

Relevant reporting documents can be found on the website of the Ministry of Transport of the Russian Federation. They were prepared on the basis of the data collected by the federated executive units like: The Federal Transport Service<sup>13</sup>, The Air Transport Agency<sup>14</sup>, The Federal Road Agency<sup>15</sup>, The Federal Rail Transport Agency<sup>16</sup>, The Federal Road Transport Agency<sup>17</sup>, and The Federal Sea and River Transport Agency<sup>18</sup>. For example, from the year 2016 concerning the implementation of tasks established in the 2008, Transport Strategy in the period 2015 (Report 2016, pages 1-231), or the ones of 2017 concerning the fulfilment of the tasks cited above, of the transport strategy in the year 2016 (Report 2017, pages 1-339). Relatively, from the year 2018 concerning the completion of tasks in the year 2017 (Report 2018, pages 1-250), and from the year 2019 concerning 2018 (Report 2019, pages 1-264). For example, the document from 2018 analyses the indicators achieved in the year 2017 compared to their value in the previous year. This has been done in relation to the six strategic objectives set, i.e.:

- creating a uniform transport area of Russia on the basis of the preparation of modern and efficient infrastructure (Objective No. 1),
- securing the availability, and adequate quantity of transport and logistics services, in the context of the level of demand in the sphere of economic development of the country (Objective No. 2),

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<sup>13</sup> Rostransnadzor – (Russian) РОСТРАНСНАДЗОР.

<sup>14</sup> Rosawiacija – (Russian) РОСАВИАМИЯ.

<sup>15</sup> Rosawtodor – (Russian) РОСАВТОДОР.

<sup>16</sup> Roszeldor – (Russian) РОСЖЕЛДОР.

<sup>17</sup> Rosawtotrans – (Russian) РОСАВТОТРАНС.

<sup>18</sup> Rosmorreczflot – (Russian) РОСМОРРЕЧФЛОТ.



- increasing the availability, and adequate number of transport services in the context of social standards (objective No. 3),
- increasing the competitiveness of the federation transport system, and the enhancement of the transit potential of the state (Objective No. 4),
- improving the security of the integrated, and sustainable transport system (Objective No. 5),
- reducing the negative impact of transport on the environment (Objective No. 6).

The Analysis included in the above-mentioned document indicates the degree (percentage) of the achieving of the above objectives in each case compared to the previous year. This has been done at different levels. The highest rate was recorded for the achievement of Objective 5 (150.84%). The objectives number 1, 2, 5, and 6 were achieved in 101.42%, 102.1%, 150.84%, and 112.3% respectively. Objective number 3 was almost fully achieved (97.64%) – (Report 2018, page 5). However, in the case of objective No 4 (increasing the competitiveness of the federation transport system, and realising the state's transit potential), the benchmark from the previous year could not be repeated (implementation at the level of 78.93%). The main cause of the aforementioned lower level of the indicator is seen in limitation the import, and transit of cargo from European countries and Ukraine. In addition, in 2017 still took place the process of increasing competition from foreign seaports located among others in the Baltic Sea basin (Report 2018, page 3). The rate of passenger transport by sea has also decreased (90%). Determination of the above indicators follows by specifying more complex first, second, or third order intermediate indicators. For the first objective, the indicators were: 1.2; 1.3.1 1.3.1.1 1.3.1.2 1.3.2 1.3.2.1 1.3.2.2 1.4.1 1.5; 1.6; 1.8.1 1.9.1 1.11.1 1.11.2 1.12.1, and 1.12.2 (Report 2018, page 8 onward). From the averaging of all these indicators (the lowest has reached a value of 51.88%, and the highest 352.94%, the above-mentioned value of the achievement of the first objective was 101.42%. For example, from the maritime transport point of view, the ports reloading capacity in 2017 (indicator 1.5) was set at 97.39%, while the transshipments achieved were determined to be 109.53% (1.12.1 indicator). With the established figures, the authors of the analysis have developed a series of conclusions. A deeper analysis is to be used for the dynamics of transformation of the above-mentioned indicators (Port Cargo WWW), wherein the case of indicator 1.5 it was set at the level of -3.88%, and the dynamics of indicator 1.12.1 was 2.4%. It is also interesting to analyse the achievement of the second goal, i.e. securing the availability, and adequate quantity of transport, and logistics services in the context of the level of demand in the sphere of economic development of the country. For example, the dynamics of the 2.8.4 indicator, i.e. the average growth in cargo ships, was set at -29.45%. The

reasons should certainly be seen on the one hand in the ageing of the Russian commercial fleet (also in the context of shortening the length of ship operation), and on the other, underestimation of the costs of ship construction, and their operation (as well as registration) under the native flag. A similar dynamics of change, i.e. -28.45% shows the indicator number 3.10.6 (determines the average increase in the tonnage of sea passenger ships).

However, it is difficult to look for indicators that directly indicate the assumed growth, the scale of which was to be much larger than the previously noted development. The initial text of the strategy (Annex 1) shows the results of earlier shipments, which are presented in table 1. It follows, that with a constant slight increase on the overall scale, the RF's sea transport decreased, and this was done with a large fluctuation in transport in other modes of transport, and at the same time with a constant increase in rail and road transport. Within seven years (2000-2007), the transport of the Russian Federation (carried out on ships registered in RF) from 35.4 million tonnes in 2000 fell to 26.7 million tonnes in 2007. In comparison, adequate rail transport has grown from 4186.8 to 5026.6, and road transport from 5878.0 to 6861.4 million tonnes. The above direct comparison of the mass of loads transported in the economy of the Russian Federation by sea (on ships registered in the RF), and by land (rail and road) indicates the small (0.346%) percentage of the first in the overall settlement of transport carried out in the RF. Where in 2007 the value of this indicator decreased to 0.221, 0%.

Table 1. Scope of transport in the Russian Federation between 2000-2007  
in millions of tonnes

Indicator [million tonnes]	Year							
	2000	2001	2002	2003	2004	2005	2006	2007
Sea transport	35,4	33,8	37,3	35,7	29,1	26,0	25,4	26,7
Rail freight	4 186,8	4 213,1	4 216,7	4 332,9	4 566,2	4 760,3	4 902,8	5 026,6
Road transport	5 878,0	6 125,0	6 348,0	6 469,0	6 568,0	6 685,0	6 753,3	6 861,4
Total Cargo Transport	<b>10 217,6</b>	<b>10 502,4</b>	<b>10 721,3</b>	<b>10 964,0</b>	<b>11 299,0</b>	<b>11 606,1</b>	<b>11 821,3</b>	<b>12 068,8</b>

*Source: own study on the basis of data from annex 1 to the Transport strategy of the Russian Federation for the period up to the year 2030 (Strategy... 2008).*

In turn, the forecast contained in annex 2 of the *Transport Strategy of the Russian Federation for the period up to the year 2030* assumes a significant increase in the aforementioned indicators, and reversal of adverse trends (see

table 2). Analysis of the aforementioned indicators; however, goes beyond the framework of this study.

Table 2. Scope of transport in the Russian Federation between 2000-2030 in millions of tonnes

Indicator [million tonnes]	Year							
	2000	2005	2006	2007	2010	2015	2020	2030
Sea transport	35,4	26,0	25,4	26,7	35,8	60,0	110,0	170,0
Rail freight	4 186,8	4 760,3	4 902,8	5 026,6	5 392,3	6 220,0	6 850,0	7 470,0
Road transport	5 878,0	6 685,0	6 753,3	6 861,4	6 955,0	7 500,0	8 800,0	10 000,0
<b>Total Cargo Transport</b>	<b>10 217,6</b>	<b>11 606,1</b>	<b>11 821,3</b>	<b>12 068,8</b>	<b>12 544,3</b>	<b>13 960,6</b>	<b>15 951,8</b>	<b>17 858,0</b>

Source: own study on the basis of data from annex 2 to the *Transport strategy of the Russian Federation for the period up to the year 2030 (Strategy... 2008)*.

However, in the context of the Baltic region, and the Russian seaports located there, implementation of the strategy progresses (see table 3). This is indicated by the data from the *Russian Maritime Administration of the Baltic Sea Ports*. The following table shows that the Russian Federation has two large ports in the Baltic Basin (St. Petersburg and Ust-Luga) showing an annual cargo turnover of more than 8 million tonnes each, one port with a load capacity of more than 3.7 million tonnes (Primorsk), two ports with a load capacity of more than one million tonnes (Kaliningrad – 1.2 and Wysock – 1.7), and a small port (Wyborg – 0.1 million tonnes of transshipment) – (Port Cargo WWW). Noteworthy is the increase in indicators for transhipped containers and rolling loads, coal, and liquefied gas, while (usually) maintaining the indicators, or the upward trend of other types of cargo. Based on the data in the table, one can read the loading priorities of each port. In St. Petersburg, these are containers. Liquid cargo (petroleum and derivatives) in Primorsk. In seaport Ust-Luga large loads of liquid loads (including gas), and also dry bulk cargo are transhipped. Meanwhile in Wyborg, these are small amounts of bulk and general cargo. In Wysotsk liquid and bulk cargo predominates. The seaport of Kaliningrad is the most balanced in terms of supported cargo diversity.

Table 3. Range of transhipments in 2016-2018 in Russian ports of the Russian Federation located in the Baltic Sea in thousands of tonnes

Port	Description of loads	Cargo handling in years [in thousands of tons/containers]			Percentage (trend) in year 2019 compared to year 2017 (compared with the trend between 2018 and 2016)
		2017	2018	2019*)	
<b>Sankt Petersburg</b>	<b>Total reloading from which:</b>	<b>4 596,4</b>	<b>5 010,3</b>	<b>5 006,7</b>	<b>108,92% (106%)</b>
	Bulk cargo	675,3	711,6	847,3	125,47% (110%)
	Wood	16,6	30,5	27,6	166,27% (84,96%)
	General cargo	1 130,0	1 181,9	925,7	81,86% (126%)
	Containers	1 961,5 (159309 TEU)	2 112,5 (170674 TEU)	2 287,5 (177723 TEU)	116,62% (107%)
	Loads on ferries	0,1	0,2	2,7	2700% (0,23%)
	Ro-Ro loads	49,9	87,9	88,5	180,61% (176%)
<b>Primorsk</b>	<b>Total reloading from which:</b>	<b>3 717,2</b>	<b>3 935,9</b>	<b>4 413,9</b>	<b>118,74% (66%)</b>
	Crude oil	2 801,7	2 896,6	3 200,3	113,82% (65%)
	Refining products	905,4	1 039,3	1 213,6	134,04% (68%)
<b>Ust-Luga</b>	<b>Total reloading from which:</b>	<b>8 924,4</b>	<b>8 774,4</b>	<b>7 820,7</b>	<b>87,63% (106%)</b>
	Bulk cargo	3 321,2	3 277,9	3 185,9	(95,93%) (138%)
	Wood	13,7	55,0	63,7	464,96% (70,69%)
	General cargo	95,6	26,1	34,8	36,40% (100%)
	Containers	47,0 (6460 TEU)	50,8 (5066 TEU)	34,6 (5518 TEU)	73,62% (107%)
	Loads on ferries	120,0	97,0	55,1	45,92% (28,69%)
	Liquid loads	5 326,9	5 267,6	4 446,6	83,47% (93%)
	Liquefied gas	215,7	199,3	104,1	48,26% (153%)

<b>Wyborg</b>	<b>Total reloading</b> from which:	<b>145</b>	<b>197,3</b>	<b>127,6</b>	<b>87,59%</b> <b>(136%)</b>
	Bulk cargo	134,5	191,2	118,2	87,88% (142%)
	General cargo	10,6	5,9	9,4	88,68% (89%)
<b>Wysock</b>	<b>Total reloading</b> from which:	<b>1 515,9</b>	<b>1 521,5</b>	<b>1 754,0</b>	<b>115,97%</b> <b>107%</b>
	Bulk Cargo	625,4	700,9	505,7	80,86% (109%)
	Liquid loads	890,6	820,7	1 248,3	140,16% (106%)
	Liquefied gas	0,0	0,0	41,2	141,2% (-)
<b>Kaliningrad</b>	<b>Total reloading</b> from which:	<b>1 249,9</b>	<b>1 143,2</b>	<b>866,8</b>	<b>69,35%</b> <b>(111%)</b>
	Bulk cargo	279,6	168,1	78,9	28,22% (109%)
	General cargo	111,0	160,0	101,0	90,99% (111%)
	Containers	73,3 (17810 TEU)	110,8 (29204 TEU)	95,9 (22634 TEU)	130,83% (102%)
	Loads on ferries	131,7	101,9	45,3	34,17% (156%)
	Liquid loads	269,6	160,9	243,2	90,21% (137%)
<b>In all the Baltic ports RF</b>	<b>Total reloading</b>	<b>20 148,8</b>	<b>20 582,5</b>	<b>19 989,7</b>	<b>99%</b> <b>(96%)</b>

*Source: own study based on the Russian Port Loads, Maritime Administration of the Baltic Sea ports (Port Cargo WWW)*

*\*) data for 11 months of the year 2019*

It must also be pointed out that another (annex 3) to the above-mentioned strategy includes indications as to the importance (weight) of the individual indicators used previously, and the indications for the necessary resources (annex 4), which were to ensure the implementation of the above-mentioned strategy.

Previously presented analyses of the extent of implementation of the current transport strategy of the Russian Federation are the basis for its updating, as for example in the year 2014, where Regulation No 1032 of the Government of the Russian Federation (signed by Prime Minister Dmitri Medvedev) of June 11 2014 *of the changes in the transport strategy of the Russian Federation* for the period up to the year 2030, on 328 pages of the text appropriate im-

provements were made (Regulation 2014/1032). In the context of maritime transport, for example, attention is drawn to a reduction to 17.1 (Regulation 2014/1032: p. 5), and compared to the previous years of maritime freight traffic with the seaports of Ukraine, Finland, Lithuania, Latvia, and Estonia.

## **SUMMARY**

The President of the Russian Federation among the most important challenges for the Federation distinguished the development of transport infrastructure. At the same time, they are stressing that the implementation of the strategic transport strategy would not be possible without ensuring harmonisation (in the interests of the strategy) regional policy. The authors of the RF transport strategy point in this context the uneven development of Russian seaports. The port capacity deficit relates primarily to the possibility of transshipment of imported goods (containers, and cargo handled in a horizontal-rolling system), while the port capacities for the handling of exported cargo were previously developed. Therefore, in the context of the changes in maritime transport based on the Baltic Sea in the Russian Federation, the comprehensive development of the ports functioning here is indicated. This is to be used for reorienting the handling of Russian cargo from foreign ports to Russian ports. This is to be accompanied by the reform of maritime transport through the maintenance, and substantial development of the merchant fleet (including the opening of the Russian Maritime Register), and port infrastructure at a level that guarantees economic independence, and security of the state (including increasing the efficiency of the state property, i.e. without the possibility of privatisation of seaports). The level of tariffs is not to exceed that determined by the world monopolists. It is taken into account that the economy, and society generate transport system needs, while the latter provides the opportunity to build a more efficient economic space. A new, effective mechanism could be in this context (which was practised in RF in 2005) attracting private investments, and measures of beneficiaries of transport infrastructure development. Territorial capitalisation aims to significantly increase the impact of transport on economic growth through the multiplicative impact of investment, and domestic consumption. Concessions in the area of main roads and urban transport, ports and airports, railway facilities and icebreakers should become a priority for public-private partnerships. The favourable geographical position allows RF to obtain significant revenues generated by the transport services sector. It is therefore indispensable to develop the capacities of seaports, including the development of provisions for increased transshipment of goods. In the strategy a lot of space was also devoted to the safety of maritime transport and, as well as reducing the environmental impact of transport. In the case of

sea transport, this means putting into operation the necessary number of vessels (among others to eliminate pollution/spills). In 2030, the total tonnage of transport fleet controlled by the Russian Federation is to be 38.9 million tonnes. 70% of this tonnage is to be registered under the federation flag. In order to safeguard the growth of cargo, and passenger transport (in order to better connect, among others, the Kaliningrad Oblast region to the country), it is planned to build cargo, and cargo-passenger ships. The scope of the reported construction, and modernisation projects shows that, in the field of maritime transport, the Baltic Sea ports became a priority in 2008 to the expansion of the Russian transport system. Between 2026-2030, the North-West Federal District is planning to further develop, and reconstruct such ports as: Primorsk, Wyborg, Wysock, Ust-Luga, Kaliningrad, and Baltiysk. Last time (2016-2019) the total reloading of seaports located in the Baltic stayed almost constant (96-99%), but the load structure changed. For example in this time, the reloading of Ro-Ro cargo in the seaport of St Petersburg became bigger in amount more than 80%. The reloading of liquid loads, and gas in Wysock increased by more than 40%. The same growth happened in Primorsk – more than 34% of refining products of crude oil. At the same time, big amounts of wood in Ust-Luga (also in St. Petersburg), and Ro-Ro cargo in Kaliningrad started to be reloaded. In the same time, reloaded containers, and gas in Ust-Luga became less.

The research efforts undertaken in this work should be continued, and the phenomena described above should be related to the overall development of logistics processes in the Russian Federation<sup>19</sup>.

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<sup>19</sup> Compare with: *Transport & Logistics In Russia: returning to Growth, A Market Insights report from TransRussia/TransLogistica*, [www.transrussia.ru](http://www.transrussia.ru).

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