ESTONIA AS A TRANSPORT CORRIDOR BETWEEN RUSSIA AND THE EUROPEAN UNION. THE CURRENT SITUATION IN THE FIELD OF TRANSPORTATION

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Transportation plays an important role in the national economy of Estonia. No less than 12% of the GDP of the country comes from the transport industry. Here, over 2800 enterprises, both of the private sector and those with the participation of the state, are working in this field. About 10 % of the manpower of Estonia is engaged in this sector. The transportation system of Estonia includes rail, road, maritime, river and air transportation, urban electric transportation and pipeline transportation.

Air transportation.

There are 12 certified airfields in Estonia. The airports in Tallinn, Tartu, Kuressare, Kärdla, and Pärnu, as well as the City Hall Helicopter Field, are open for international traffic. The Lennart Meri Tallinn Airport is situated 4 km from the city centre of Tallinn and is the largest airport in terms of facilities and traffic. In 2012, the number of passengers was more than 2,2 million, 98 % out of those were on international flights. The growth of passenger traffic in 2012 as compared to 2011 was over 16%. New lines have been opened and there are more regular lines per week compared to the previous year. More than 24,000 tons of cargo were transported. Cargo turnover has risen by more than for 31 % compared to the year 2011. The airports of Estonia are servicing the regular flights of such companies as Estonian Air, Air Baltic, Avies, Blue 1, City Airline, Czech Airlines, Easyjet, Ryanair, Finnair, LOT Polish Airlines, Lufthansa, Norwegian, Utair, Aeroflot and others.

Road Transportation.

As of January 1st, 2012, Estonia had 58,412 highways, the state owned highways amounted more than 28 % with the length of 16,500 km. The length of the highways of E category (E roads are the part of the European International Highway within the UN Economy Commission for Europe) is 995 km. In 2012, 31.7 mln t of goods were shipped by road transport, out of which ca 18% was international transportation.

The main cargoes in 2012 were the following: metallic ores and other products of mines and open pits — 31 %; agricultural products, forestry and fishery products — 15 %; foodstuffs, beverages and tobacco — 8 %; woodwork and timber products — 7 %; non-metallic mineral products — 5 %; other cargoes — 34 %. Cargo turnover in 2012 amounted to 7,098 mln t per km, more than 75 % of it was achieved on the account of international shipping. The majority of cargoes is transported by road from Estonia to the neighboring countries: Russia, Latvia and Finland. The majority of the cargo destined to Estonia is delivered from Finland, Latvia and Russia. Most trucking companies are the members of the Association of International Trucking of Estonia (ERAA).

Maritime Transportation.

Estonia has 45 ports, which are registered in the State Register. The major Estonian ports and their maximum depth at quays are listed as followed: Port of Muuga — 18 m; Paldiski Northern Port — 17 m; Sillamae Port LTD — 16 m; Paldiski South Port — 13 m; Tallinn Old Port — 11 m; Paljassare Port — 9 m; Kunda Port Ltd — 9 m. All the main ports in Estonia are servicing vessels all year round. There are free customs zones in the territories off the Sillamae Port and the Port of Tallinn. The activities of the railway transport are within the jurisdiction of the Ministry of Economy and Communications, more precisely within the framework of administration of Estonian Maritime Administration. The most important port in Estonia is the Port of Tallinn. In addition to the Old City harbor and Paljassare harbor, Port of Tallinn is the owner of the Port of Muuga and the Paldiski South harbor. With

the exception of Parnu harbor all other major cargo ports are located in Northern Estonia not far from the St. Petersburg—Tallinn—Paldiski railway. The transportation of goods through Estonian ports was strongly growing during the last decade of the millennium (1990—2000). The first decade of new century has shown milder growth with temporary setbacks caused by global economic crises and by some political decisions made by the Estonian government. Several cargo ports and companies operating in those ports have been actively involved in finding diversified cargoes and developing value adding services, like processing, re-packaging, logistics etc. In fact, the main transit cargoes from Russia to Estonia were oil products.

After 3 years of growth in the loading and unloading volumes in Estonian ports, the cargo volume decreased in 2012. In 2011, Estonian ports handled 48.5 mln t of cargo (representing a 5 % growth compared to 2010), whereas in 2012 a total of 43.3 mln t of goods were loaded and unloaded in Estonian ports, which is 10 % less than the year before. The most frequently handled group of goods in Estonian ports was still oil products (about 25.3 million tons), although the transportation of these products decreased by 15 %. Among the largest groups of goods carried, the transportation of nitrogen compounds and fertilizers rose by a quarter. Sea container transportation through ports in TEUs increased by 15 %, but transit container delivery decreased. The amount of goods delivered in containers (in tons) increased by 8 % compared to 2011.

The main types of goods handled in Estonian ports are: oil products — 58 %, nitrogen compounds and fertilizers — 7 %, stone, sand, gravel, clay etc. — 6 %, goods in containers — 4 %, products of forestry and logging — 4 %. The main commodity categories of imports are agricultural and fishery products — 23 %, timber and wood processing products — 17 %, metal ores — 15 %. The main commodity category of exports is metal ores — 26 %. The main commodity categories of transit are coke and oil products — 84 %.

The main factors impacting the competitiveness of a port are: the geographical location, politics, governance, technical specifications and services. The main factors in their turn will definitely affect the cost of port operation and, finally, the total transportation cost. That's why for any company, who is planning to start shipping their cargoes through Estonia, every factor is important. Compared to the other ports, the Port of Tallinn has the following good qualities: transparency, access to information, cooperation with the port authorities, certainty of decisions, the bureaucracy level, and cooperation with railway infrastructure operators. Compared to other ports, the governance in the port of Tallinn is more transparent, as highlighted by industry experts. The price level is the key determinant for holders of bulk cargo, like coal and oil products. However, the presence of additional services does matter for more value added cargo.

Railway transportation.

The total length of railway tracks in Estonia is 1,320 km. There are state-owned and private railway enterprises. The main one is the Estonian Railways LTD with its affiliates — EVR Infra, dealing with servicing railway infrastructure, and EVR Cargo, which is in charge of cargo transportation. In 2012, the railway companies in Estonia carried 44.7 mln t of commodities, which was over 8 % less than in 2011. The amount of freight carried on public railways was 26.2 mln t. Refined oil products comprised up to 15 million tons of this amount, but their transport fell by nearly a fifth in 2012. Among the major groups of cargoes, the transportation of chemical products increased the most (about 48 %), amounting to 4.9 mln t. The transportation of chemical products also grew in export.

Import and transit.

Estonian Railways has many years of experience in operating regular block trains with various cargoes, including containers. Baltic Transit is a regular container train line to Central Asia. It is running since 2003. It is a joint project of the railway companies of Russia, Estonia,

Latvia, Lithuania, Kazakhstan, and Uzbekistan. FESCO Integrated Transport (FIT) operates this train line. Moscow Express is a regular container train line running since 2007. It was set up for the efficient container delivery from Tallinn to Moscow. ZUBR is a container train line, with the route Tallinn—Riga—Minsk—Ilyichevsk/Odessa since 2009.

Conclusions.

Maritime transportation plays the key role in the transportation field. The competition for transit goods is quite strong between the Russian ports such as Ust-Luga, Saint-Petersburg, and the ports in neighboring countries such as Latvia and Lithuania. One of the advantages of Estonian ports is that they do not freeze for most of the winter. It helps increase the cargo volumes and make the situation in the winter more attractive economically.

ТЕНДЕНЦИИ РАЗВИТИЯ МИРОВЫХ ЦЕНТРОВ РЕЭКСПОРТА

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Мировая экономика на современном этапе характеризуется опережающими темпами роста в сравнении с национальными экономиками. С учетом доли реэкспорта в международной торговле интерес представляет изучение тенденций развития современных центров реэкспорта (табл. 1).

Таблица 1

Динамика развития лидирующих по реэкспорту стран в мировой экономике за 2008—2012 гг., млрд дол. США

Страна	Реэкспорт, млрд дол. США				
	2008	2009	2010	2011	2012
Гонконг (Китай)	353,3	312,6	385,9	438,7	470,5
Нидерланды	266,6	221,1	255,0	290,9	—
ОАЭ	44,3	40,2	50,6	57,4	—
Сингапур	162,5	131,8	169,1	185,6	180,2
США	131,1	120,3	155,8	181,4	193,2

И с т о ч н и к: собственная разработка на основании баз данных стастистических органов стран и ООН.

В последние годы наблюдается устойчивый прирост объемов реэкспорта в данных странах, за исключением его падения в 2009 г. в связи с глобальным экономическим кризисом. Необходимо отметить, что реэкспорт сократился меньшими темпами в сравнении с экспортом аналогичного периода. Доля реэкспорта в экспорте развитых стран колеблется незначительно, лишь в экспорте Сингапура и ОАЭ отмечено падение доли реэкспорта, что может быть связано с реализацией экспортного потенциала в этих странах. Реэкспорт Гонконга составляет до 96 % экспорта в силу исторических особенностей и административного положения, поэтому его динамика обладает наименьшей информативностью.

Благодаря высокой концентрации капитала развитые страны лидируют в мировом реэкспорте. Германия, используя устойчивые внешнеэкономические связи и высокотехнологичное производство, также относится к современным центрам реэкспорта, с объемом реэкспорта 193,3 млрд. Евро (2008 г.) [Federal Statistical Office Germany, 2013]. Так, она является мировым лидером реэкспорта кофе, поставляя его в различные страны мира, включая США, ЕС и Россию [International Coffee Organization. Re-export of coffee by Germany, 2013].