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Providing competitive advantages to exporters of mineral raw materials and finished products of the Ural and Siberian regions through the use of the Trans-Caspian route of the international North–South transport corridor

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Abstract

Relevance. International transport corridors play a leading role in the formation of an integrated global market for raw materials, consumer goods and transport services. The development of the Trans-Caspian and Altai routes of the International North–South Transport Corridor gives the Ural and Siberian producers of mineral raw materials and finished products of export-oriented industries direct access to the growing markets of Iran, Pakistan, and India.

Purpose – substantiation of the need for exporters of raw materials and finished products of the Ural and Siberian regions to use the Trans-Caspian route of the International Transport Corridor North–South to gain competitive advantages over suppliers from the South of Russia and the Far East.

Methodology – analysis of the economic and logistical advantages of the Trans-Caspian and Altai routes of the international transport corridor North–South in comparison with other routes.

Results. The Sverdlovsk Region occupies a unique transport and geographical position at the junction of regional and global Eurasian continental transport links, and the Ekaterinburg railway junction is one of the largest transport and logistics hubs in Russia, located on the main course of the Trans-Siberian. But with the supply of mineral raw materials and finished products to the Asia-Pacific region for all border crossings to China east of Krasnoyarsk or the seaports of Primorye, the transport leg of the delivery of goods from enterprises of the Ural region will be at least 1–2 thousand km more than for Siberian exporters, and their transport costs will be higher. The development of new directions for the export of raw materials, finished products and modern logistics technologies will allow exporters of the Ural and Siberian regions to significantly increase the volume and profitability of exports. Especially convenient for the Ural and West Siberian exporters of mineral raw materials and finished products will be the Trans-Caspian route Kazakhstan–Turkmenistan–Iran with the possibility of further transportation of products to Pakistan and India through the under-construction port of Chabahar or the existing ports of Bandar Abbas or Gwadar. For the export of coal from Kuzbass to India, a new route has been proposed without passing through the Trans-Siberian Railway and Baikal-Amur Mainline (where the carrying capacity of the railway will be occupied by coal from Yakutia and Eastern Siberia) – along the railways of Kazakhstan, Uzbekistan, Turkmenistan and Iran (direction from Kuzbass through Semipalatinsk–Aktogay–Tashkent–Mary–Seraks–Bandar Abbas and by sea to Mumbai), which reduces the distance of the sea part of transportation up to 5 times.

Conclusions. The development of a new route for the export of coal and other mineral raw materials to the countries of South Asia will allow the coal enterprises of Kuzbass and Ekibastuz to increase supplies to 10–12 million tons/year, regardless of the expansion timing of the throughput capacity of the BAM and Trans-Siberian Railway and will reduce the deficit problem severity in the carrying capacity of the railroad to the ports of Primorye for the export of coal from the deposits of Yakutia and the Far East. An increase in the mutual and transit cargo turnover of the EAEU countries, India and Iran will give an additional impetus to the economies of all member countries of the association, create new jobs, reduce transport costs, and increase the volume and profit of mutual trade.

Keywords: mineral raw materials supply, coal enterprises, efficiency, cost price, Iran, India, transportation methods, export routes.

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Introduction

The products of the mining and metallurgical complex make up a significant share in the total volume of industrial products in Russia. In 2019, this figure was 19.3%, and in the Sverdlovsk region – 59.9%. These are enterprises that export coke, iron ore, minerals, oil and oil products, metals and metal products, etc. The goods are exported to the CIS, Germany, China, Iran, Iraq and other countries. The International Transport Corridor (ITC) North–South (fig. 1) is a multimodal route for the transportation of passengers and goods with a total length of 7200 km from St. Petersburg to the port of Mumbai (Bombay) [1]. This ITC was created to attract transit traffic from India, Iran and other countries of the Persian Gulf to the Russian territory (including the Caspian Sea) and further to Northern and Western Europe. The development of the ITC in accordance with the Transport Strategy of the Russian Federation until 2030, the Strategy for the Development of Railway Transport of the Russian Federation until 2030 and the General Scheme for the Development of the Railway Network of OAO RZHD for the period up to 2020 and for the future until 2025 is one of the priority directions of the transport policy of our country. The legal basis for this project is the intergovernmental agreement on the North-South international transport corridor, signed by Russia, India and Iran in St. Petersburg on September 12, 2000 during the II International Eurasian Transport Conference. Iran is the depositary of the Agreement. By May 2002, the Agreement was ratified by all its participants and went into force.

International transport corridors no. 9 (Finland–St. Petersburg–Moscow with branches to Astrakhan and Novorossiysk) and no. 2 (Berlin–Warsaw–Minsk–Moscow–Nizhniy Novgorod–Yekaterinburg), the Volga and Don transport infrastructures, including the Volga-Baltic and Volga-Don canals, have become integral parts of the North-South ITC. The formation of the North–South ITC is viewed by Russia as an important transit route between the countries of North-Western Europe, the Caspian Basin, the Persian Gulf, Central, South and Southeast Asia, as well as an opportunity for the further development of Eurasian transportation over more short and economical route.

The main advantages of the MTC North–South over other routes and, in particular, over the sea route through the Suez Canal consist in reducing the transportation distance by two or more times. At the same time, the cost of transporting containers from Germany or Finland to India will be significantly less than the cost of transportation by sea. A significant part of the North-South corridor runs along Russian railways, which, depending on the route, account for 33–53% of the total length of the overland part of the corridor. The core direction for the Russian side within the ITC is: Buslovskaya–St. Petersburg–Moscow–Ryazan–Kochetovka–Rtishchevo–Saratov–Volgograd–Astrakhan with a length of 2513 km [1]. When in September 2000 Iran, Russia and India reached an agreement to start work on the organization of the North-South International Transport Corridor (ITC NS), it seemed that the regional geopolitical picture in Eurasia would no longer undergo significant changes, and the parameters of trade-economic dynamics will move up. But subsequent events made significant adjustments: the US invasion of Afghanistan and Iraq, the increase in China's influence over Central Asia and world trade,

the emergence of the “One Belt and One Road” Initiative, several small waves of economic recession, the resumption of economic sanctions against Iran, and a large-scale US trade war against Russia, and then against China. All this led to a reduction in commodity flows and a decrease in the value of ITC NS in the region. Nevertheless, publications of many authors, writing about international trade and logistics, are still devoted to the ITC NS [2–8].

One of the landmark events in this direction, which can dramatically change the implementation pace of integration projects, was the recent statement by the Speaker of the Iranian Parliament Mohammad Bakery Kalibaf about the beginning of the procedure for Iran's joining the Eurasian Economic Union following the exchange of messages between Russian President Vladimir Putin and the Supreme Leader of Iran Ayatollah Ali Khamenei.

Russia has reasons to support Iran's entry into the integration bloc. The Eurasian Economic Union is an integrated market with a total population of about 180 million people and a combined GDP exceeding \$ 5 trillion. It promotes the free movement of goods and services, as well as pursues a unified policy in such key areas as energy, agriculture, transport, foreign trade and investment. Iran has already had a free trade agreement with the Eurasian Economic Union since 2018. In 2020, the total trade between Iran and the EAEU increased by 2% and exceeded \$ 2 billion, despite the negative impact of the Covid-19 pandemic and US sanctions. Most of this trade in both directions was in food products and agricultural raw materials – 80% of the goods that Iran imported from the EAEU countries and 68% of the goods it exported. Joining the EAEU would improve the economic and political position of Iran in the world and would help compensate, at least in part, for the damage caused by the American sanctions.

Iran appears to be one of the most promising partners in the region for Russia. It is a large state of Eurasia, the Middle East, Western and Western Asia with a population of 80 million, a rich history and a strong army. And so far it is the only key for Russia to India, without which Eurasian integration would mean economic absorption by China for the Russian Federation. India is reliably cut off by Pakistan (the countries have a long-standing conflict and disputed territories) and Afghanistan – the hottest point of the continent, which has the highest mountain range, the Pamir. The most convenient route for cargo is through Iran, which is reflected in the idea of the North-South transport corridor project. And in this context, Iran's accession to the EAEU will simplify the movement of Russian cargo (primarily coal and other types of raw materials) to the ports of Bandar Abbas and Chabahar, a direct sea route to Mumbai. Trade routes, besides India, can be laid to Iraq, Kuwait, Qatar, UAE, Saudi Arabia, Oman, Yemen, Sri Lanka. The countries of East Africa and Indochina will be in relative proximity. The Iranian government plans to increase the throughput of the Chabahar port from the current 2.5 million tons to 8.5 million tons, and the completion of the construction of the eastern railway corridor Chabahar-Zahedan is carried out within the framework of the national infrastructure development plan (fig. 1) [9, 10].

As a result of the Russian-Indian negotiations within the framework of the latest business mission, information was published on the agreements between Russia and India on the



Figure 1. Transport infrastructure of Iran and the International North-South Transport Corridor
Рисунок 1. Транспортная инфраструктура Ирана и международный транспортный коридор «Север–Юг»

supply of anthracite and coking coal. Delhi and Moscow are discussing the supply of up to 40 million tons of raw materials per year worth about \$ 4.5 billion at current prices. Now Russia exports to India less than 1 million tons of metallurgical coals out of a total export of 46 million tons. The Minister of Natural Gas and Steel of India, Dharmendra Pradhan, estimated the country's need for coking coal at 70 million tons, of which 55 million tons are consumed only by the steel industry. And the shortest route from Kuzbass to India will be transit along the railways of Kazakhstan, Turkmenistan and Iran (direction from Kuzbass through Barnaul to Astana–Beineu–Bereket–Inche Burun or through Semipalatinsk–Aktogay–Tashkent–Mary–Seraks with a large number of border crossings). That is, the Trans-Caspian (or Altai-Uzbek) route of the ITC North-South can receive a stable cargo base of the railroad transportation main product – coal. To reduce costs when switching from 1520 mm to 1435 mm gauge and reloading to sea transport, a new technology for transporting coal in containers may be relevant, which, of course, requires more detailed calculations for specific routes and cargo. Compared to the traditional route through the port in Taman, passing through the Bosphorus and the Suetskiy Canal, the time and cost savings on the new route will reach 30–40%. According to experts, the delivery time of goods from Moscow (or Kuzbass) to Mumbai (India) will be reduced by about 20 days. It is assumed that the annual turnover of the North-South corridor will reach 20–30 million tons.

The potential cargo base of the North-South transport corridor is not limited to coal only (fig. 2) [11]. Already to-

day, on the “long” sea routes (around the whole of Europe and through the Suez Canal) supplies of mineral fertilizers (India in 2018 – 1494 thousand tons), as well as vegetable oils to Iran (2019 – 539.1 thousand tons) and India (200.5 thousand tons) are provided. Products of heavy and transport engineering, defense industry are also actively shipped. The range of products exported by Iran is widely represented by those types of food that Russia is forced to import due to climatic conditions – nuts, citrus fruits, tropical fruits, as well as products of light and textile industries. Fruit and vegetable products traditionally occupy the main share in the structure of Russian food imports. Import to Russia of goods from the group “Products of vegetable origin” for the season 2019–2020 amounted to 10.9 billion dollars with a total weight of 11 560 thousand tons. It was fruit and nuts (46%) and vegetables (16%) in the winter season that were mainly imported.

In the structure of food imports to Russia by country (goods from the group “Products of vegetable origin”), Ecuador is in first place (11%), in second – Turkey (10%), in third – in China (8.6%). Thus, Iranian supplies can be an alternative to Turkish and Chinese imports of consumer goods and exotic fruits. In other words, a counter cargo base is being formed, which can form the basis for the formation of a new, shorter and more profitable for the Ural and Siberian exporters and importers of the Trans-Caspian route of the ITC North-South. Taking into account the American sanctions against Iran and Russia and the existing positive trade balance of export-import of Iran and Russia with third countries, it is

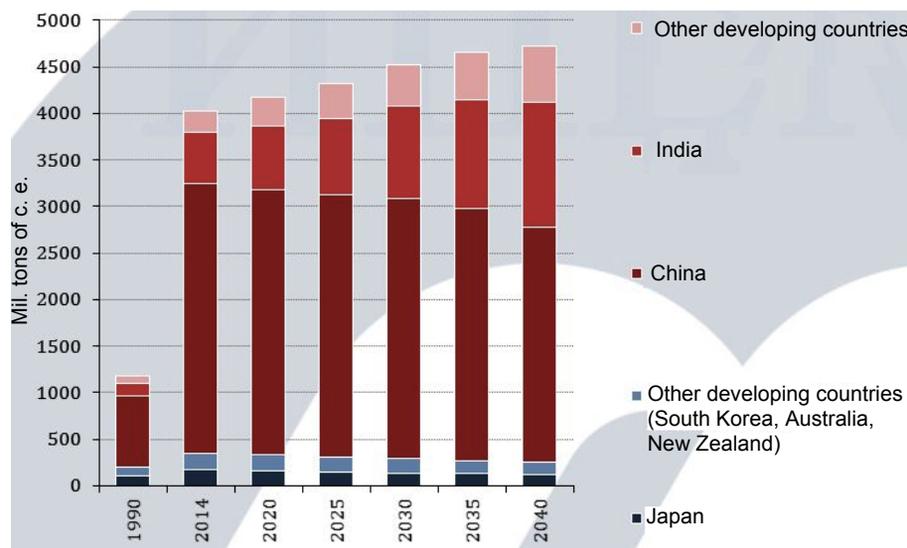


Figure 2. Forecast of coal consumption in the Asia-Pacific region. Source: IEA, China Energy Portal

Рисунок 2. Прогноз потребления угля в странах Азиатско-Тихоокеанского региона. Источник: МЭА, China Energy Portal

possible to organize mutual settlements in Chinese yuan or Indian rupees.

According to the Agroexport center subordinate to the Ministry of Agriculture, in 2020 Russia exported agricultural products worth \$ 30.3 billion, and export supplies exceeded food imports for the first time. In kind, in 2020, 785 million tons of agricultural products and food were supplied abroad. It was grain that was exported the most – 48.6 million tons for \$ 10.1 billion. The export of fat and oil products reached 8 million tons for \$ 4.8 billion, meat products – 524.9 thousand tons for \$ 885.3 million, dairy – 206.7 thousand tons for \$ 317.9 million, fish and seafood – 2.2 million tons for \$ 5.3 billion, food and processing industry products – 9.4 million tons for \$ 4.4 billion [12]. Egypt, Saudi Arabia and Turkey were among the main buyers of Russian grain. Fat and oil products were exported mainly to India, China and Turkey, meat products to Vietnam, China and Ukraine. In other words, among the main buyers of Russian export products of non-oil-and-gas assortment, those countries are widely represented that will be more accessible with the full launch of the North–South ITC, and the freight base of carriers will be supplemented with an agro-industrial nomenclature.

Results

In 2019, the main export product of the Sverdlovsk region, according to the Statimex portal, was ferrous metal, while in 2020, from the second quarter, goods exported under the secret code rose to the first place (fig. 3). Also, the Sverdlovsk region ships abroad copper and copper products, metal-ceramics, aluminum and aluminum products, timber industry products, as well as reactors, electrical machines and equipment, plastics, fats. The industry of the region exports chemical products, locomotives, products of the military-industrial complex. The most exported goods in 2020 were metals and metal products (60%), machinery, equipment and vehicles (16%), chemical products and rubber (13.8%), mineral products (4.8%), wood and pulp and paper products (2.5%). The main recipients of the export products of the Sverdlovsk region are China, the United States, Kazakhstan, Germany, Turkey, Uzbekistan. The

region cooperates both with neighboring countries and with European consumers. Also, among the partners there are many countries from the Asian region, and their share is growing at an outstripping pace [13]. Traditionally, it is believed that the Sverdlovsk region occupies a unique transport-geographical position at the junction of regional and global Eurasian continental transport links. One of the largest railway junctions in Russia, the Ekaterinburg railway junction, located on the main course of the Trans-Siberian Railway, operates within the region. But when we consider the main cargo flows from Russia for export, it turns out that for the Azov-Black Sea and Baltic seaports, the shippers-exporters of the Ural region are farther than most other suppliers of products (for example, the agro-industrial complex) from the Central, Southern and Volga federal districts, and their transport costs will be higher. A possible exception is shipments on the Ekaterinburg – Helsinki container train (according to a fixed schedule through the border crossing at Buslovskaya station) or to the Baltic port of Ust-Luga (Leningrad region), if the final consignee is in an EEC country.

A new direction for the export of Russian products – the North–South International Transport Corridor (ITC) – is still at the stage of formation. Although most articles about the North–South ITC, as a rule, talk about the Volga–Caspian Sea–Iran water route (with problems with winter navigation), today this corridor is represented by two more railway routes: “western (or Caucasian)” through Astrakhan–Makhachkala–Baku to st. Astara (Azerbaijan Railways) with transshipment to motor vehicles in Iran [14] and “eastern (or Trans-Caspian)” through Kartaly–Orsk–Makat–Aktau (Kazakhstan)–Beyneubereket (Turkmenistan) to Inche Burun and Amirabad (Iran) with the transition to the Iranian railway track (1435 mm) and the possibility of further transportation of products to Pakistan and India through the under-construction port of Chabahar or the existing ports of Bandar Abbas or Gwadar (Pakistan) (fig. 4) [15]. In addition to these directions, the authors of the article suggest that industry experts discuss another route within the broadly defined North–South ITC: from Kuzbass to

India through the railways of Kazakhstan, Turkmenistan and Iran – the direction from Novokuznetsk through Barnaul to Astana-Beineu-Bereket-Inche Burun or through Semipalatsinsk-Aktogay-Tashkent-Mary-Seraks (with a large number of border crossings). The development of the Trans-Caspian and Altai routes of the ITC North-South gives the Ural and West Siberian producers direct access to huge consumer markets: Iran – a population of 80 million people, Pakistan – 215 million people, finally, India – 1.5 billion people. In addition to these countries, through the ports of Bandar Abbas, Chabahar and Gwadar, sea deliveries are also possible along the shortest route to the United Arab Emirates, Qatar, Saudi Arabia, and the countries of East Africa.

Let us now consider the situation in another popular direction – China, South Korea, Vietnam, the countries of Southeast Asia. Unfortunately, the situation is similar in many respects, for all border crossings to China east of Krasnoyarsk or the seaports of Primorye, the transport leg of delivery for goods in the Ural region will be 1–2 thousand km longer than for Siberian exporters (Altai Territory, Omsk, Novosibirsk, Kemerovo regions), let alone the suppliers of our Far East. In addition, it should be borne in mind that almost all volumes of the increase in the throughput capacity of the BAM and the Trans-Siberian Railway announced by RZHD are ready to be used by coal exporters from Eastern Siberia (Elginskoye deposits, Yakutsk deposits) and the Far East.

Perhaps, the only exception in the eastern direction is border crossings between China and Kazakhstan at Dostyk stations (these are directions through Kostanay, Petropavlovsk and Astana) and Khorgos (through Astana, Almaty), where modern transport and logistics centers have been created, and China subsidizes railway tariffs on its territory for the delivery of products to the central provinces [16]. But exporters from Southern Siberia will still gain almost 1,000 km in distance compared to the Urals. Consequently, in the traditional directions of export, the Ural producers of products can only work with highly profitable products, where the share of transportation costs in the price of the product will not be critical for the end buyer, or using the advantages of accelerated container

trains (including refrigerated containers), which are formed by RZHD-logistika, TransContainer and other federal companies in large logistics centers (including Ekaterinburg). The delivery time is reduced by about three times, the cost – up to four times thanks to the technology of container trains following a fixed schedule.

Conclusions

The development of new export routes for Russian products along the North-South ITC gives a logistic advantage to the suppliers of the Ural macro-region. It should be remembered here that since the Earth is an ellipsoid, a straight line on a conventional map will not be the shortest path on the ground. The farther north the route goes on Earth, the shorter it is (therefore, now the flight from Asia to America goes through the North Pole, and not across the Pacific Ocean). Therefore, the tariff distance for transportation from St. Petersburg through Astrakhan to Aktau will be quite comparable with transportation from St. Petersburg through Ekaterinburg-Kartaly-Orsk-Aktau. It should also be borne in mind that over the 30 years after the collapse of the USSR, Kazakhstan and Turkmenistan have developed their railways with the intentions of integrating them into international transport corridors, including creating new border crossings on the borders with China and Iran (fig. 5). The creation and successful operation of the United Transport and Logistics Company (UTLC) within the borders of the Eurasian Economic Union (EAEU) and in a single legal framework now allows Russian exporters to use these new routes. Publications about them are rarely found in publications and scientific collections of AO RZHD universities, since they were originally created as competing alternative routes and are served by national carriers.

In today’s world, the “eastern (or Trans-Caspian)” route will be especially convenient for the Ural and West Siberian exporters: through Kartaly-Orsk-Makat (Kazakhstan)-Beyneu-Bereket (Turkmenistan) to Inche Burun and Amirabad (Iran) with a transition to the railway gauge of Iran (1435 mm) and the possibility of further transportation of products to Pakistan and India through the under-construction port of Chabahar or the existing ports of Bandar Abbas or Gwadar [17].

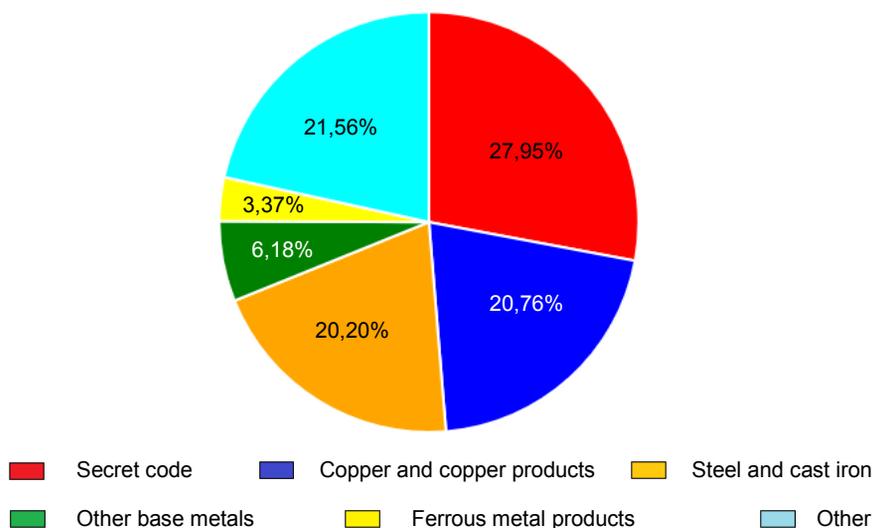


Figure 3. Commodity structure of exports of the Sverdlovsk region
Рисунок 3. Товарная структура экспорта Свердловской области

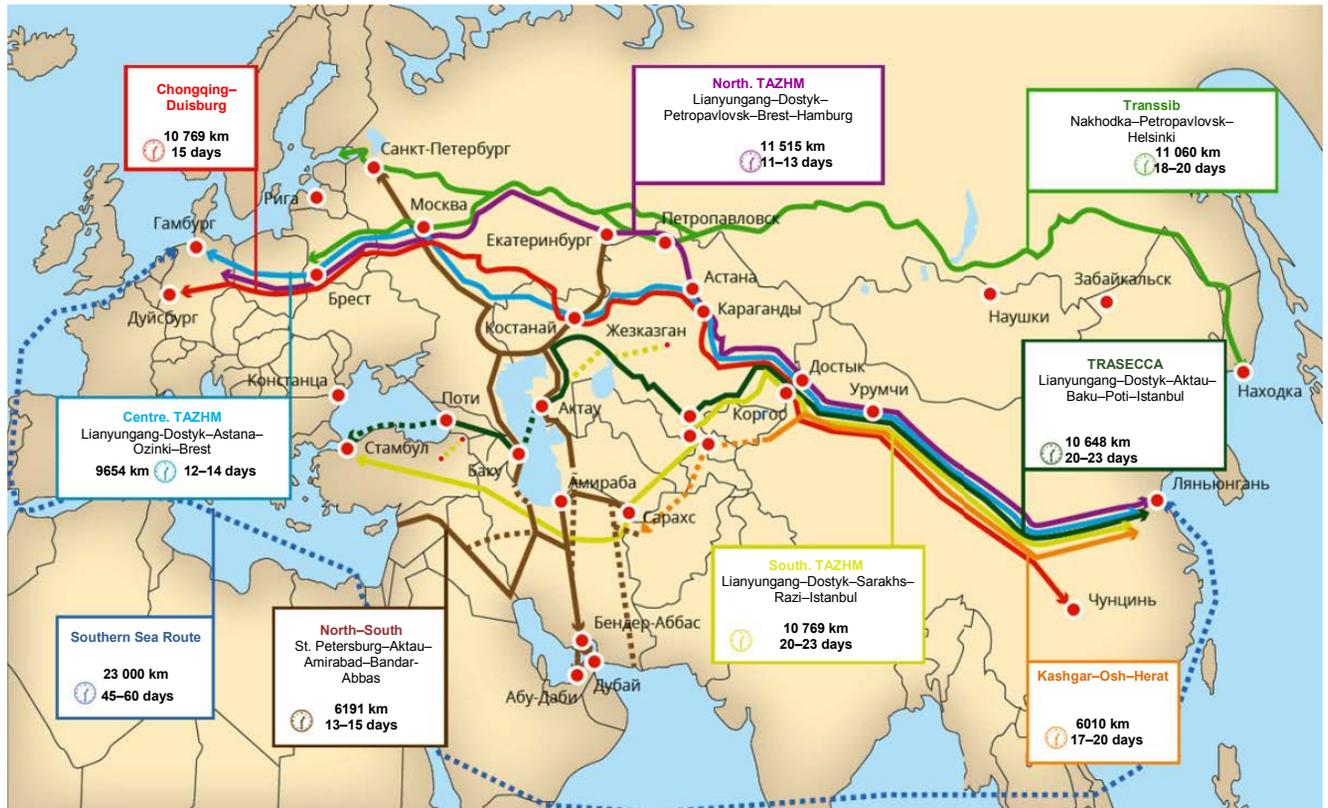


Figure 4. Eurasia major international corridors
Рисунок 4. Основные международные коридоры в Евразии



Figure 5. Development of railways in Central Asia and Kazakhstan over 30 years
Рисунок 5. Развитие железных дорог Средней Азии и Казахстана за 30 лет

In turn, the redirection of export supplies of coal from Kuzbass to India along the railways of Kazakhstan, Turkmenistan and Iran (direction from Novokuznetsk through Barnaul to Astana–Beineu–Bereket–Inche Burun or through Semipalatsk–Aktogay–Tashkent–Mary–Seraks with a large number of border crossings) will allow to transfer up to 10 million tons of coal to new routes in the next year or two, thereby freeing up the carrying capacity on the Trans-Siberian Railway and BAM (without waiting for their complete reconstruction) for coal from Yakutia and the Far East.

An alternative to the expensive electrification of these routes to reduce the cost of transportation can be the organization of the second “gas carrier” landfill of RZHD on them, using cheap and environmentally friendly gas motor fuel instead of expensive diesel fuel. All the countries along the route are gas producers and will be able to provide the gas filling infrastructure with raw materials. Subsidiaries of AO Gazprom have already announced their readiness to invest in the development of the retail network to expand the use of NGV fuel. For railway workers, it will also be relevant that the proposed route does not pass along the Trans-Siberian Railway and makes it possible to

bypass its “bottlenecks” in Ekaterinburg, Tyumen, Omsk and Novosibirsk. Although it may be necessary to strengthen the track infrastructure and increase the network capacity in the South Urals and Altai, border crossings with Iran when processing “coal routes”. If necessary, the routes of the ITC North-South can be extended to the north with a railway access to the ports of the Northern Sea Route: Sabetta, Arkhangelsk and, in the future, 2035 – to the ports of Indiga, Igarka, Dudinka, if by then the issue of exporting coal from the new Taimyr deposits arises. Active cooperation of the EAEU countries in the logistics sphere, the creation and successful operation of the United Transport and Logistics Company (UTLC), the experience of introducing uniform consignment notes and shipping documents in digital format allow us to expect that the integration of the Iranian transport network into the overall logistics of the EAEU will be held in a short time and new directions of the North-South ITC will quickly gain momentum. An increase in the mutual and transit cargo turnover of the EAEU countries and Iran will give an additional impetus to the economies of all member countries of the association, will create new jobs, and increase the well-being of their peoples.

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