

High-level consultation meeting on Eurasian Economic Integration

IIASA project

“Challenges and Opportunities of Economic Integration
within a Wider European and Eurasian Space”

Workshop Report

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This document summarizes the deliberations of the High-level workshop at IIASA on 27-28 June 2017. Views or opinions expressed herein do not necessarily represent those of the institute, its National Member Organizations, or other organizations supporting the work.

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About IIASA

Founded in 1972, the International Institute for Applied Systems Analysis (IIASA) conducts policy-oriented research into problems of a global nature that are too large or too complex to be solved by a single country or academic discipline. IIASA's research areas are energy & climate change; food & water; and poverty & equity.

IIASA is at the center of a global research network of around 2,500 scholars and nearly 600 partner institutions in over 65 countries. It is funded and supported by its National Member Organizations which represent the scholarly communities in the following countries:

Australia, Austria, Brazil, China, Egypt, Finland, Germany, India, Indonesia, Iran, Japan, Malaysia, Mexico, Netherlands, Norway, Pakistan (Observer), Republic of Korea, Russia, South Africa, Sweden, Ukraine, United Kingdom, United States of America, Vietnam.

Background

On 26-27 June 2017, IIASA hosted a high-level consultation meeting to further discuss the second phase of the IIASA Futures Initiative “Challenges and Opportunities of Economic Integration within a wider European and Eurasian Space”.

The event concentrated around one full day on the high-level stakeholder segment and one day of an expert meeting. Stakeholders and organizations interested in participating and supporting the second phase of the project were presented a brief overview of the first phase (2014-2016), plans for the second phase (2018-2022), as well as the research on-going in 2017 as fast track studies. All the discussions are based on the “Lisbon to Vladivostok” and “Greater Eurasia” common economic space concepts. The aim of the meeting was to help IIASA in shaping the future content and direction of research, as well as to have the opportunity to pledge support.

Phase I (2014-2016): The story so far

Overview

During the first part of the high-level meeting, a detailed overview of the results of Phase I of the research project was presented.

Launched in June 2013 and carried out in 2014-2016, the first (pilot) phase of an international research project (IIASA Futures Initiative) “Challenges and Opportunities of Economic integration within a wider European and Eurasian Space” **aimed at discussing and critically evaluating the potential and conditions for the creation of a common economic space** between the European Union (EU) and the emerging Eurasian Economic Union (EAEU)¹..

This project is highly relevant to the IIASA’s overall mission. Firstly, it utilized and further enhanced IIASA’s historical status as a science-diplomacy bridge between East and West. The project created a successful platform that lives up to the commitment of bringing together high-level policy makers and recognized scientists into a constructive dialogue despite unfavorable political odds, thus working towards peace and cooperation based on **science diplomacy**.

Secondly, the project delivered to the attention of experts and policy makers in the EU and EAEU a research agenda supporting the creation of a common economic space ‘from Lisbon to Vladivostok’, thus reflecting the IIASA’s **science-to-policy efforts**.

High-level dialogue

This project has been very timely. Due to the escalating the EU-Russia political turmoil and hence deteriorating economic relations related to the Ukrainian crisis, the interactions of the officials from the EU and Russia and even experts have been seriously affected since mid-2014. **IIASA has been one of the few rare platforms** where high-level officials and experts from Russia, the European Commission, the Eurasian Economic Commission and European and CIS countries could meet and discuss the challenges and opportunities of (re-) establishing closer economic relationships and an eventual creation of a common economic space between the EU and the EAEU.

Among the participants of the workshops were recognized policy-makers and experts, incl.: **Andrey Slepnev**, Member of the Board – Minister in charge of Trade, Eurasian Economic Commission; **Stephan Nolte**, Senior Economist, DG Trade, European Commission; **Rahim Oshakbaev**, First Deputy Chairman of the Board, National Chamber of Entrepreneurs of Kazakhstan, **Stefan Meister**, Senior Policy Fellow, European Council of Foreign Relations; **Paul de Lusignan**, Leading Expert, Tariff and Non-Tariff Negotiations, Rules of Origin, DG Trade, European Commission, **Stefanie Harter**, Head, Liaison Office to the German Ministries of Foreign Affairs, Defense, Interior and Justice, German Agency for International Cooperation, **Evgeny Hotulev**, Director, Department of Macroeconomic Policy, Eurasian Economic Commission; **Alessandro Nicita**, Officer-in-Charge, Trade Policy Research Section, Trade Analysis Branch, Division on International Trade, United Nations Conference on Trade and Development; **Tair Mansurov**, Member of the Board – Minister in charge of Energy and Infrastructure, Eurasian Economic Commission; **Jean-Arnold Vinois**, Directorate General for Energy, European Commission; **Stefan Füle**, EU Commissioner for Enlargement and European Neighbourhood Policy (2010-2014); **Tatiana Valovaya**, Member of the board (Minister) on integration and macroeconomics, Eurasian Economic Commission; **Thomas Kuchtik**, Policy coordinator for Russia, CIS, Ukraine and The European Free Trade Association, European Commission; **Jeffrey D. Sachs**, special adviser to the United Nations Secretary-General Ban Ki-Moon (2007-2016) and Kofi Annan (1997-2006), Professor, Columbia University, Director, The Earth Institute, United States; **Vaclav Klaus**, President of the Czech Republic (2003-2013).

¹ Prior to EAEU: Belarus, Kazakhstan and Russia Customs Union (2010-2012) and Single Economic Space (2013-2014)

More than 200 recognized experts, stakeholders and policy-makers from numerous countries and organizations, notably, from the EU and EAEU member-states, but also from the USA, China, Turkey, South Korea, Japan, Ukraine and other states participated in the workshops in the first phase.

Approach and outcomes

The project was organized around **a series of roundtables/workshops** each addressing a specific dimension of the economic relations between the EU, EAEU and neighboring countries:

1. Methodology for Assessing Effects of Regional Economic Integration: 06 Mar 2014 – 07 Mar 2014;
2. Trade Policy Regimes: 08 July 2014 - 09 July 2014;
3. Non-Tariff Barriers and Technical Regulations: 20 November 2014 - 21 November 2014;
4. Futures of Energy in Eurasia in a Global Context: 12 May 2015 - 13 May 2015;
5. Development of Transport and Infrastructure in Eurasia: 15 September 2015 - 16 September 2015;
6. Labor Market and Migration across the Eurasian Continent: 13 April 2016 - 14 April 2016;
7. EU-EAEU in Greater Eurasia: Long-Term Agenda for Economic Cooperation: 22 November 2016 - 23 November 2016.

Each workshop resulted in a report synthesizing inputs from the participants and outcomes of the discussions. In addition, a synthesis report in Russian language has been published.

Other publications include **over 250 individual smaller reports and presentations** prepared by the participants over the course of the seven workshops.

Dissemination

The outcomes of the workshops were promoted to the policy and expert communities in the EU and EAEU, as well as to the general public, through:

- **Individual meetings of the project core group members with the highest level policy makers.**
- **Participation of the core group members at international high-level conferences**, including: Alpbach Forum, Saint-Petersburg International Economic Forum, Moscow Economic Forum, Gaidar Economic Forum (Moscow), Valdai Forum (Sochi).
- **The project web-site.**

EU – EAEU: economic background for a deepened cooperation

During the first part of the high-level meeting, the participants discussed main pre-conditions and obstacles for an increased cooperation between the European Union and the Eurasian Economic Union and the potential for the creation of a common economic space from Lisbon to Vladivostok. The following are the major arguments.

The EU is the largest trading partner of the EAEU: in 2016 it accounted for about 50% of the total exports from, and for about 41% of the total imports to the Eurasian Economic Union.

The importance of the European Union for the EAEU is also evidenced by the sheer volume of the European market, whose GDP in 2016 amounted to USD 16.4 trillion at current prices and USD 20 trillion on the PPP basis (EAEU: USD 1.5 trillion and USD 4.5 trillion, respectively), while the EU population exceeded the EAEU population by a factor of 2.8 in 2016.

European capital has made sizeable investments in the economies of Russia and its Eurasian Economic Union partners. Thus, according to the Eurasian Development Bank, Austria's investments stocks in the EAEU in 2016 stood at USD 8.9 billion, including investments in Russia of USD 5.2 billion, while Dutch FDI in the EAEU has reached USD 21.2 billion, including FDI in Russia of \$12.2 billion. However, in the recent years, there was a strong downward trend in EU investment flows to the EAEU countries, especially to Russia, and even the stock of total investment has fallen showing an outflow of European capital.

Even though the priority is still given to the European capital, the EAEU countries are more and more often look for alternative sources of foreign investment. It is important for European investors to understand that they are exposed to an increasing risk of losing EAEU markets due to the inflow of capital from the leading Asian economies. On the other hand, no breakthrough in the downward trend of European investment can be expected unless there is an improvement in the EU-Russia political relations, and even more importantly, in Russia's investment climate, protectionist trade policies and the conditions offered to foreign investors in general.

However, a protectionist trade policy per se may be conducive to FDI, for example, in the food processing industry in Russia (Havlik).

According to the FDI database of the Eurasian Development Bank, capital investments in the EU accounted for 62% of the total Russian FDI and for 90% of the total Kazakh FDI. Therefore, despite a growing importance of Asian (especially China), trade and investment links with the EU remain critical for the EAEU.

From an EU perspective, the share and even the absolute value of trade and investment flows with the EAEU countries has been declining in the recent years, while no similar trend could be observed in case of other major regions. This shows that, apart from vulnerability to oil prices, political tensions, sanctions and the actual economic policies in the EAEU countries are acting as deterrents to the development of trade and investment relations. (Balas)

Larger part of trade decline in 2014-2016 can be attributed to oil price collapse and related devaluations. (Havlik)

It is clear that the present trends do not benefit either side, after all the geographical proximity, the long traditions of East-West relations should lead to stronger inter-regional economic ties. Thus, there would be common interest in reversing these downward trends – which would require a change in the negative factors mentioned above.

Russia's "Turn to the East" is slowly gaining momentum. The APEC countries are beginning to overtake the EU as a source of imports: in 2016, the Eurasian Economic Union imported relatively more goods from APEC countries (42% of total imports - mostly from China, Korea, and ASEAN countries) than from the EU (41%). However, the EU still remains by far the most important export market. (Vinokurov)

In order to properly discuss the prospects and challenges for a deepened economic cooperation between the EU and the EAEU, one also has to keep in mind the economic dimensions and economic asymmetries of each player, both in an inter-regional and intra-regional context.

After the Brexit, Germany and France will account together for about 35% of the EU-27 economy. The "new" Eastern European member states (that joined the EU in 2004 and 2007, respectively) will account for 14% of the EU-27 GDP. In contrast, the EAEU economy is dominated by Russia (87% of EAEU GDP in 2016). (Havlik)

The results of 2016 survey within the "EDB Integration Barometer" show, that up to **82% of EAEU states' citizens support the potential conclusion of an EAEU – EU agreement on free trade and investments**. The EAEU, in turn, is EU's third largest trade partner after the US and China (Russia, if taken separately from its EAEU partners, is currently holding the fourth position). (Vinokurov)

Proposal of Phase II (2018-2022): where do we go from here and how

IIASA is planning to launch **Phase II** of its international research project (IIASA Futures Initiative) “Challenges and Opportunities of Economic Integration within a wider European and Eurasian Space” and begin its implementation in 2018. The working title of Phase II is “**EU – EAEU (– China) in Greater Eurasia: Long-Term Agenda for Economic Cooperation**”.

During the second part of the high-level meeting, the participants shared their views on the potential focus of Phase II.

EU – EAEU: audit of mutual interests

Already during the first part of the research project, an **audit of interests of the European Union and the Eurasian Economic Union** in creating a potential common economic space from Lisbon to Vladivostok was conducted. During the high-level meeting, the participants elaborated a more in-depth understanding of these interests of both sides, on which any future negotiations for deepened cooperation should be based.

It should be noted, that the interests of the EU and the EAEU partially coincide and partially diverge. Yet, in any case, as mentioned above, there would be an objective mutual interest in stronger economic cooperation. The table below summarizes the understanding of EU’s and EAEU’s interests as emerged from the discussions.

Interests of the European Union	Interests of Eurasian Economic Union
<ol style="list-style-type: none">1. Trade liberalization (i.e., creation of an comprehensive FTA with the EAEU);2. Elimination of the measures hindering competition on equal terms between domestic and foreign companies in the EAEU member states;3. Guarantees of energy security (supply security).	<ol style="list-style-type: none">1. A comprehensive FTA with the EU only in the long term and with substantial transition periods;2. Growth of European investments;3. Transfer of technologies from the EU;4. Stability of demand for energy in the EU (demand security).

Within the structure of a possible EU-EAEU agreement, there are likely to be asymmetric mutual concessions and a broad range of issues might be covered (in addition to above mentioned economic asymmetries).

The EAEU member states are more interested in a comprehensive agreement with the European Union that would cover a much broader range of issues than those covered by a standard free trade area agreement. This is supported by the conclusions of research done by the Munich based Ifo-Institute², which states for example that should the markets be opened, the EAEU agriculture and automotive industry may suffer losses. (Felbermayr, Vinokurov)

The EU approach in the last decade has been to negotiate and sign only comprehensive FTAs with other countries which ensure extensive liberalization of trade in both goods and services, the

² Freihandel von Lissabon bis Wladiwostok. Wem nutzt, wem schadet ein eurasisches Freihandelsabkommen? Bertelsmann Stiftung; Ifo-Institut. 216 S. 2016.

substantial liberalization of the movement of capital as well as of people linked to economic activities. These agreements also provide for either a comprehensive harmonization or mutual recognition of regulations affecting trade and economic relations. (Balas, Havlik)

Harmonizing trade regulation of the two unions, both in the tariff and non-tariff sphere, will likely to occur by the EAEU adopting the EU standards, or international standards, coinciding with those of the EU (Valovaya).

Most of the member states of the EAEU, except for Belarus, are WTO members. However, the fact that Belarus is not yet a WTO member is one of the main technical obstacles to deepening the EU - EAEU cooperation. In strict legal terms, this is of course not an obstacle for potential EU - EAEU FTA negotiations. However, the lack of Belarus' membership would complicate these negotiations since one of the participants would not be bound by WTO rules. The best strategy would be to assist Belarus in a speedier accession to the WTO, what would be beneficial both for Minsk and the Eurasian Economic Union in general (Vinokurov).

According to Tatyana Valovaya, Minister in charge of the Development of Integration and Macroeconomics, Eurasian Economic Commission (EAEC), the EAEC is generally interested in having a **dialogue with the European Commission at the official level**. Secondly, the EAEU would prefer a **non-preferential trade and investment agreement with the EU**, but with more in-depth regulation of non-tariff barriers, mutual recognition of technical barriers to trade and sanitary – phytosanitary measures, facilitation of the customs procedures, cooperation in science, research and the digital economy. (Valovaya)

Asymmetric solutions need to be found, where the EAEU countries would gain additional advantages in exchange for the partial opening of markets. They are primarily interested in two things – access to European capital, and access to European technologies.

Such ideas are, however, not realistic from the EU's point of view either in economic or legal terms. The EU is interested in agreements providing a comprehensive liberalization (even if this does not happen promptly but within a limited transition period), furthermore any FTA foreseeing only a “partial” opening of markets would be illegal under the WTO rules. (Balas, Havlik)

When thinking about the content of a potential agreement between Brussels and Moscow one should take into account the EU 2020 strategy and the EAEU 2025 program documents. (Ricceri)

Winners and losers

According to the general economic theory, the creation of an EU-EAEU FTA should produce an **overall positive impact** stemming from the mutual opening of the two unions' markets.

The export of natural resources and industries such as steel, chemicals, the production of certain intermediate products, as well as agricultural sectors producing cereals, certain meat and dairy products from EAEU countries could gain from an FTA with the EU. (Felbermayr)

According to these estimates, a possible emergence of an EU-EAEU free trade agreement³ is expected to have a positive effect on trade between the EU and the EAEU, and a 30% increase of Russian exports (primarily of natural resources) to the EU. The EU exports to the EAEU are projected to grow even by 60% (particularly as regards machine engineering and agricultural products), bringing real income in Central and Eastern European countries (Baltic states, Poland,

³ [Ibid.](#)

Czech Republic, Slovakia) up by 1.2 - 1.8%. The inclusion of Ukraine in this FTA would increase the estimated benefits even more. (Felbermayr, Movchan)

In the long run, real income in Russia is expected to increase in this case by 3.1%. Belarus income may post an even more significant increase by 4.9%, with growth indicators in the other EAEU member states also winding up in the positive domain. Economic gains from EU-EAEU FTA would even bigger if Ukraine would be covered as well.

In Russia, most benefits will be reaped by metallurgy (the national net worth would go up by 23%), mining industry (growth by 17%), and the petroleum industry (growth by 15%). The agriculture and automotive industry, conversely, may suffer (-16% and -37%, respectively). In the EU, industry trends will be the reverse of those described above, with agriculture and automotive industry being the chief beneficiaries. (Felbermayer)

The European Union's metallurgic companies are less competitive than the Russian and Eurasian ones. Thus, the EU is likely to eliminate its imports tariffs only over a longer period. However, a harmonization of non-tariff barriers, i.e. a facilitation of customs procedures in this sector is possible. (Klepach)

According to other estimates by the Moscow-based CEFIR and the Russian Presidential Academy), the hypothetical EU-EAEU FTA would benefit Kazakhstan (an increase of GDP by 2.6%), the EU and Russia, while Armenia (-3.4% of GDP), Georgia, Azerbaijan, Belarus, and Moldova may find themselves on the losing side. In particular, export of Armenian food and beverages (liquors, tomatoes, grapes, cheeses and curds, fish) to EAEU member states may decrease. It should be noted, however, that these are only preliminary calculations. (Knobel)

However, one should be cautious when predicting which countries and sectors are likely to win and lose from a potential Lisbon to Vladivostok common economic space. One should not base future projections on trade statistics of the past. Most advanced analytical approaches should be used to produce more reliable estimates. (Klepach)

When studying the potential losers and winners from the Lisbon to Vladivostok concept, it is important to use econometric models, based on micro regional statistics, i.e. that of federal states, not whole countries, as well as on gravity models. (Felbermayr) These issues were investigated and discussed in greater detail at several workshops during Phase I.

As part of a FTA, the EU would require to include important cross-cutting commitments related to such areas as the enhanced protection of intellectual property, government procurement, trade-related investment measures, the intervention of the state and government decisions in the economy, disciplines on state-owned and state-controlled enterprises. (Balas)

Business interests

The Eurasian Economic Commission pays crucial attention to the interests of the **business community**, both domestic and foreign. (Valovaya)

The German industry, both large and medium size enterprises, is highly interested in the establishment of an EU – EAEU common economic space. In particular, the SCHNEIDER GROUP organized the “Lisbon to Vladivostok” Working Group that combines leading German companies doing business in the Eastern Europe and former Soviet Union.⁴ The working group

⁴ <http://schneider-group.com/en/news/5th-meeting-working-group-lisbon-vladivostok/>

appeals to the Eurasian Economic Commission and the European Commission to start official cooperation negotiations. (Schneider).

However, according to the European Commission, such a step would require a broader positive change in the political area, in particular the easing of the tensions around Ukraine. (Balas)

When discussing matters of a potential agreement, one should heavily consult the private sector not only of Europe and the CIS, but also from other regions of Greater Eurasia and from Northern America as well. (Thompson)

Greater Eurasia

The participants of the high-level meeting agreed that the Lisbon to Vladivostok common economic space ought to be thought about within a wider Eurasian context, and that this should be kept in mind when conducting further research as part of Phase II. This is necessary both due to Russia's geo-economic **“Turn to the East”**, and even more so, due to the growing influence of Asia in the global economy, especially **the Chinese “One Belt One Road” (OBOR) and “Silk Road Economic Belt” (SREB) initiatives.**

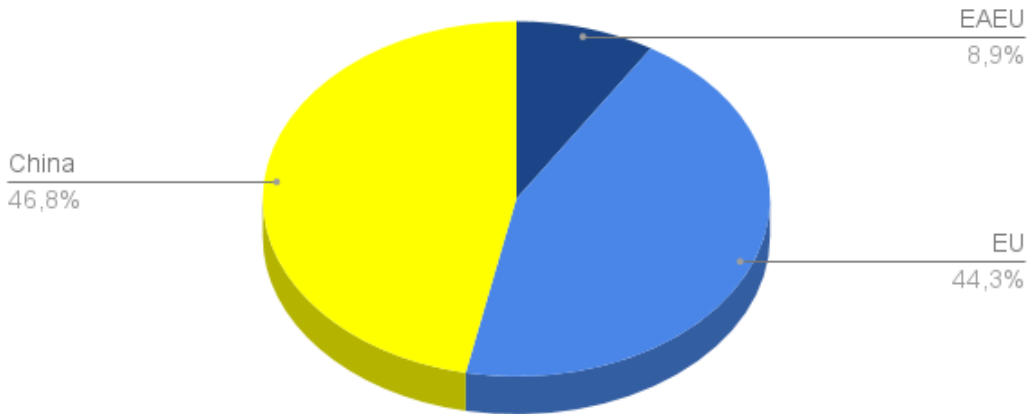
“Greater Eurasia” is both a geographic concept covering the whole Eurasian continent as defined by German geographer Alexander von Humboldt, as well as a way of describing the emerging nexus of continental “integration of integrations” and the network of FTAs within the EU – EAEU - China “triangle”, as well as with other regional players. (Kofner)

The Greater Eurasian agenda thus concerns not only the EU and the EAEU, but also the future relations between the main players in Asia, in particular with China, as a direct neighbor of the EAEU. There are some major developments: China's “One Belt One Road” as a framework idea, the development of railway and road connectivity, large investments projects, including projects related to energy supplies, as an example of possible content.

The concept of the **EU – EAEU - China “triangle”** entails enhanced economic cooperation and eventually economic-trade liberalization in the bilateral relations between each pair of the three major economies, however – at least in the foreseeable future - not an overall trilateral agreement among all three of them. Still, there are a number of challenging opportunities for economic cooperation, including such areas as trade, cross-border transport infrastructure and transit, telecommunications.

Table 1. GDP shares in Greater Eurasia (EAEU, EU, China), in % of total (at PPP, 2016)

GDP share in Greater Eurasia (EAEU, EU, China)
PPP, 2016



Source: World Bank.

The **economic imbalances**, to a far lesser extent in the European Union than in the Eurasian Economic Union, and even more within the EU-EAEU-China triangle in Greater Eurasia (see Table 1), raise the following questions: How these structural differences may affect future negotiations between the EC, the EEC and the Chinese government? To what extent will the imbalances shift in China's favor if it enters the Greater Eurasia integration process?

The takeaways from these imbalances are the following: The EU is less dependent on EAEU/Russian markets than vice versa, especially regarding exports, yet for the EAEU/Russia, the EU market will remain crucial. In addition, there are major structural asymmetries in the composition of EU-EAEU trade (Havlik)

Hence, even without geopolitics and sanctions, the economic, technical and institutional obstacles to Greater Eurasia integration are and will be formidable.

Still, a closer integration of the EU27, the EAEU, other Eastern Partnership countries and China could boost trade, investment and economic growth in a Greater Eurasia.

One should be cautious when using the Greater Eurasian "triangle" concept, i.e. referring only to Europe, the Eurasian Union and China, since Greater Eurasia is rather a multi edged geometrical shape than a mere triangle. This means, that when considering the future architecture of the Greater Eurasian partnership, one should always take into account the interests and potentials of other important players on the continent, such Japan, Korea, India, Iran, Turkey and others. (Klepach)

China

Negotiations on the conclusion of a **non-preferential trade and economic cooperation agreement between the Eurasian Economic Union and the People's Republic of China (PRC)** are being held since the Decision of the Supreme Eurasian Economic Council of May 8, 2015.

It is expected that this agreement will include several mutual obligations, including: “Horizontal and legal matters”, “Transparency”, “Market protection measures”, “Technical barriers to trade”, “Sanitary and phytosanitary measures”, “Customs cooperation”, “Intellectual property”, “Competition”, “Public procurement”, “Sectoral cooperation” and “E-commerce”.⁵

The non-preferential trade and economic cooperation agreement between the EAEU and PRC is similar to the EU - Russia Partnership and Cooperation Agreement from 1997. It is only about economics and not about politics. Within this agreement, the establishment of the free trade zone is not considered. However, the aim is to decrease non-tariff barriers, thus giving Eurasian companies a better access to the Chinese market and facilitate the possibilities for commodities exports to China. (Valovaya)

The question arises what will be the role of the European Union in this Greater Eurasian triangle. (Valovaya)

Switching the EAEU's pivot to China will not be easy. China, rather than EAEU, is the more important (and growing) trading partner for the EU. There are deeper and more complex economic relations between the EU and China, than with the EAEU, and even liberalization talks about some aspect of the economic relations (investments) have started. At the same time, China is the single most important and rising trading partner for the EAEU/Russia (in particular for imports). (Balas, Havlik)

The EU - China economic and trade relations develop quite fast, but on the other hand there are also tensions. One of the most important problems is the same as with Russia, the direct influence and support by the government in the economic area, causing distortions. Thus, in the EU there are disputes about China's market economy status and there are also concerns about the lack of reciprocity when it comes to investments: China heavily controls foreign investments, while actively investing also in strategic sectors in the EU countries. These factors also show up in the negotiations about the bilateral investment agreement, which move ahead, but on these problems acceptable solutions need to be found. (Balas)

In 2013 the EU and China launched negotiations for an **Investment Agreement**. The aim is to provide investors on both sides with predictable, long-term access to the EU and Chinese markets and to protect investors and their investments.⁶

Mongolia

Another important point to consider in the Phase II research would be the inclusion of Mongolia into the Greater Eurasian triangle, since this country is quite important for companies, operating in Siberia. Potentially interesting would be to include trans-Mongolian transport and energy corridors, hydropower generation in Siberia, trans-Eurasian electricity networks. (Sergeyev)

EU - EAEU neighborhood linkages

Vassilis Maragos, Head of Unit, DG NEAR, European Commission (EC) stated during the workshop, that the European Commission is in general open to the idea of enhanced cooperation between the EU – Eastern Partnership countries and EAEU and a potential **inter-linkage of integrations in Eastern Europe**. Yet, until this stage we have seen “competing integrations” in Eastern Europe, rather than “integration of integrations”.

⁵ <http://greater-europe.org/archives/3138>

⁶ <http://ec.europa.eu/trade/policy/countries-and-regions/countries/china/>

The European Neighborhood Policy (ENP) is a foreign relations instrument of the European Union, which seeks to tie those countries to the east and south of the European territory of the EU to the Union. These countries, primarily developing countries, include some who seek to one day become either a member state of the European Union, or more closely integrated with the European Union.

The Deep and Comprehensive Free Trade Agreements (DCFTA) are three free trade areas established between the European Union, and Georgia, Moldova and Ukraine respectively. The DCFTAs are part of each country's EU Association Agreement. They allow Georgia, Moldova and Ukraine access to the EU's internal market and grant EU investors the same regulatory environment in the associated country as in the EU. The agreements with Moldova and Georgia have been ratified and officially entered into force in July 2016, although parts of them were provisionally applied already earlier. The agreement with Ukraine is provisionally applied as well, but has not been ratified yet.

The EU Association Agreements are aimed at helping the signatory states to implement the “*aquis communautaire*” in order to benefit from the common market. (Sourmelis)

Yet the DCFTA countries (Moldova, Ukraine, Georgia) have difficulties in complying with the higher European standards. (Thompson)

When thinking about any potential interlinkage between the DCFTAs and the CIS FTA, implementing the **rules of origin** would be a logical way to proceed. (Movchan)

The “Lisbon to Vladivostok” working group of the German business is regularly conducting meetings with the Chambers of Commerce of Poland and Ukraine to convince them to support deepened cooperation between the EU and the EAEU. (Schneider)

It would be beneficial, not least by relieving Ukraine and other EaP/DCFTA countries from impossible “either/or” integration choices as Armenia and Kazakhstan examples illustrate, when they maintain and develop economic relations with both the EU or with the EAEU. (Havlik)

Belarus

In October 2016, the EU and the Republic of Belarus formally launched a **Mobility Partnership** to ensure a better management of migration flows. Minsk officially abolished visas for EU citizens and Brussels, on its side, introduced visa facilitation measures for Belarusian citizens. (Maragos)

Kazakhstan

Kazakhstan, together with Belarus and Russia, was one of the three founding members of the Eurasian Customs Union (2010), and later, of the Eurasian Economic Union (January 2015). Kazakhstan has traditionally been one of the driving forces behind the Eurasian integration process.

At the same time, in December 2015, the European Union and Kazakhstan signed the **Enhanced Partnership and Cooperation Agreement (EPCA)**. This new agreement, which constitutes the first of its kind signed by the EU with one of its Central Asian partners, elevates relations between the EU and Kazakhstan to a new level. The new Agreement replaces the Partnership and Cooperation Agreement in force since 1999. Its provisional application started on 1 May 2016. (Ghambaryan; Sarybay)

Armenia

In January 2015, Armenia joined the Eurasian Economic Union (EAEU) (with Russia, Belarus, Kazakhstan and Kyrgyzstan). Despite Armenia's decision in September 2013 not to sign the Association Agreement with the EU, including a Deep and Comprehensive Free Trade Area (AA/DCFTA), Armenia and the EU continue their political and trade dialogue in areas where this is compatible with Armenia's participation to the EAEU.

In March 2017 the EU and Armenia initiated a Comprehensive and **Enhanced Partnership Agreement (CEPA)**.

Within this agreement, Armenia will try to promote the adoption by the EAEU of the EU TBT and SPS standards, or the implementation of new Eurasian supranational standards, that are compatible with those of the European Union.

The CEP divides TBT/SPS regulation into three baskets: 1. Supranational legislation of the Eurasian Union, which is not touched in the agreement; 2. Armenia's national TBT and SPS standards, that ought to be brought in line with the European level; 3. Unregulated aspects. (Ghambaryan)

Moldova

In April 2017, the EEC and Moldova signed a **Memorandum of Cooperation and Understanding**. The heads of the member states of the EAEU welcomed the intention of the Republic of Moldova to obtain **observer status at the EAEU** and instructed the Eurasian Economic Commission to develop and submit to the next session of the Supreme Eurasian Economic Council a position paper on the status of an observer state.

The long process of granting Moldova the quite modest status of an observer within the Eurasian Economic Union is explained by the Eurasian Economic Commission's, and especially Kazakhstan's position, that they do not want to provoke an even deeper divide in the Moldovan society on the decision of the country's participation in either the European or the Eurasian integration projects. The Eurasian Economic Union does not want to provoke a situation similar to what happened in Ukraine, where one part of the population wanted integration with Europe and another part wanted closer ties to Russia. (Sarybay)

To pursue both integration vectors, it would be beneficial for all participants, not least by relieving Ukraine and other EaP/DCFTA countries from impossible "either/or" integration choices. As mentioned above Armenia and Kazakhstan, despite being member states of the EAEU, already negotiate advanced partnership agreements with the EU. (Havlik)

Strengthening trade and economic cooperation between Moldova and the EAEU should not be perceived as a "zero sum game", but rather as conceived within the wider concept of a common economic space from Lisbon to Vladivostok.

As long as the EU does not recognize the international legitimacy and subjectivity of the Eurasian Economic Union, the Eurasian side should not chase after a "mega deal" between the European and Eurasian commissions. Rather, a potentially successful experience of cooperation of the smaller Eastern European countries, such as Serbia, Georgia and Moldova, with both the EU and the EAEU, may pave the way for an agreement between the two unions in the future. (Kofner)

The Association Agreements between the European Union and Georgia, the Republic of Moldova and Ukraine do not exclude the possibility of creating a free trade zone with third parties. However, any such initiative must be approved by the European Union and must not conflict with the provisions of AA/DCFTA.

Similarly, the Treaty on the Eurasian Economic Union (2014) provides for the possibility of establishing free trade zones between the EAEU and third parties (article 7 of the Treaty), and does not prevent the Member States of the Union to sign other international agreements, as long as they do not contradict the purposes and principles of the Treaty (article 114 of the Treaty).

It is technically possible to match the EU and CIS free trade zones by implementing and monitoring "rules of origin", which would allow to prevent the re-export of European goods to the Eurasian market by illegally marking them as goods from Moldova that would be exempt from customs duties in the EAEU. The "rules of origin" institute is successfully being used worldwide. (Movchan)

The creation of a trilateral commission consisting of representatives from Moldova, the EAEU and the EU could be proposed for conducting consultations and to find a mutually beneficial format of cooperation. A prototype of such a negotiation platform in a scientific and expert format could be based at IIASA.

Many Western politicians and experts, , when talking about the Eurasian Economic Union, call it a Russian neo-imperialist project

This is unfair and incorrect, since; firstly, all EAEU member states have an equal voice in the governing bodies of the Union - the High Eurasian Economic Council and the Council of the Eurasian Economic Commission. All decisions have to be based on a consensus. Secondly, modern Eurasian economic integration was proposed and initiated not by Russia, but by Kazakhstan as early as 1994. (Sarybay)

IIASA fast-track studies

Phase II of the Eurasian research project at IIASA is scheduled to begin in 2018. In 2017, three fast-tracked studies will be conducted. The outlines of these studies were presented to the participants of the high-level meeting, who in turn gave their recommendations and suggestions. These studies will be conducted by IIASA with the involvement of external researchers and institutions.

The three fast-track papers will be focusing on the following sectors of the potential EU – EAEU economic cooperation: foreign direct investment, trans-continental transport corridors and non-tariff barriers.

EU – EAEU: foreign direct investment

Within the broader subject of capital flows – one of the four basic freedoms of international economic relations, including the EU's Internal Market – Foreign Direct Investment is by far the most important component of long term capital flows. While there are other forms of investment, e.g. acquiring a limited, non-controlling ownership of existing companies, clearly FDI has the potentially most positive impacts for the investing and even more, for the recipient countries. It is mostly FDI through which the transfer of financial resources, of technology and management know-how occurs, which results in new - often high-tech - production capacities and which results

in exportable products, sales to foreign markets – often to that of the investing country. FDI by definition implies long-term relations, providing stability to the overall economic relationship, enhancing trade also in goods and services, and in the flow of people linked to investment projects.

FDI is a very important aspect of the economic relations in the Eurasian region, as well. The member countries of the EAEU, the Eastern Partnership (EaP) countries, as well as the Central Asian countries have become since the early 1990s major targets for FDI from the EU Member States. The growth rate of FDI has often exceeded the development of all other forms of economic-trade relations. In the last decade reverse investment flows into the EU, especially by Russian companies, have become also more significant.

However, exactly the long-term nature of FDI makes it especially sensitive to all changes in the political, macro-economic or economic policy environment. As the investing companies enter into a long-term commitment and establish projects in the recipient countries, which fall under the latter physical and legal controls, they forcefully react to any negative turns. This was evident in the region several times, first due to the slow-down, if not drop in the economic performance of both the EU and the EAEU countries during 2008-09, and even more since 2013, with the deepening political tensions in particular with Russia due to the Ukrainian crisis and the collapse of energy prices. The earlier large inflows have turned into outflows as the investing companies not just stopped putting in more money, but often cut back, if not closed down or sold their assets in the East. The sanctions introduced by the Western countries, including by the EU, have in several ways affected the investment flows, too. The negative effects were enhanced by the overall deteriorating economic and business environment, especially in Russia, but also in other countries of the region. While the largest investors, multinational companies were often able to cope with the worsening conditions, investments by the small- and medium-sized companies were especially hard hit.

Due to these reasons a short-term research project aimed at exploring the actual situation, the factors influencing the development of FDI and ideas for short-term steps to reverse the negative trends is of particular importance for practically all countries of the region. The area of FDI is huge, it is by definition one of the key subjects of Phase II, thus this early harvest project will be necessarily limited in both scope and depth. It will not cover as yet the third component of the Eurasian „Mega-Project”, China, and it will deal only with the most fundamental aspects of the FDI activity, without fully exploring all relevant factors playing a role in the evolution of investment flows.

The areas of the fast track paper are the following:

A. Factual aspects	B. Analysis of the role of various policies and measures on FDI flows
Analysis of the FDI activity in the region during last 10-15 years, the investment flows in the major investor and recipient countries, as well as its sectoral composition.	Political developments, including both the indirect impacts of the political tensions, as well as the effects of formal sanctions
Assessment of the impacts of falling investment flows on both the investing and recipient countries.	Evolution of the macroeconomic situation in the major investor and recipient countries, the broader economic environment, the impacts of budgetary and monetary policies on FDI flows.

Summary of the major international regulatory elements of FDI, including the rules of the WTO and the OECD.

The EU's, the EAEU's, as well as the individual countries' competences and regulatory regimes on FDI.

Assessment of the impacts of official policies and measures related both to the broader business and investment environment, as well as to specifically to the conditions of FDI, to its geographic and sectoral composition

Assessments by the official and business circles about the investment climate in the major investor and recipient countries of the region.

While point A. strongly influences FDI flows and its impacts will be described, the resolution of these issues is outside the scope of research of IIASA's Eurasian Project. In the macroeconomic area (point B) there might be some possibility for short-term action, but it is probably limited.

Thus, realistic short-term actions will be elaborated whereby limited policy changes might have major positive impacts on FDI flows. Such positive steps can also much influence the assessments about the investment climate, which then have a feed-back effect on the actual FDI activity.

Trans-Eurasian transport corridors

Physical infrastructure – in particular transport links, including transport corridors, logistic hubs, etc. – underpins international economic cooperation. Raising efficiency of land transport corridors in the Greater Eurasia context could boost the efficiency of trade and create multiple opportunities for manufacturing as well as establishing various supply chains. It is of particular importance for the land-locked countries and region (all of Central Asia, Russian Urals and West Siberia, China XUAR etc.). Many of these issues also bear high importance for other Asian economies, particularly for the Republic of Korea as well as Iran.

The current situation with regard to the physical and regulatory barriers on transcontinental routes is complex. All countries along the China-EAEU-EU axis have partly or completely different technical and operational standards. The impact of barriers in the area of international freight transport contributes to higher tariffs and lower speed of transportation, thus effectively limiting overall efficiency and blocking various business opportunities. The transit potential of the EU-EAEU-PRC routes remains unfulfilled.

The objectives of this study are to assess the prospects of trans-Eurasian transport corridors.

A. Analysis of cargo flows between EU, EAEU countries, and the PRC, as well as the quantitative assessment of the prospect for the cargo turnover along the China-EAEU-EU axis

Objectives:

To analyze the current cargo turnover and goods nomenclature carried by railroad

B. Analysis of existing barriers to the development of international freight transport and transit along the China-EAEU-EU axis

Objectives:

To assess the existing barriers in the territory of the EAEU countries, the

C. Assessment of the potential interest of the EU countries to increase trans-Eurasian overland transit

Objectives:

To assess and quantify the potential interest of the EU countries and businesses in

<p>transport/motor vehicles (with the focus on container traffic by railway), including multi-modal arrangements, along the China-EAEU-EU axis (in transit and at intermediate points between the EU and EAEU countries, and between EAEU and China).</p>	<p>EU and PRC, as well as their effects on cargo flows:</p>	<p>making use of the trans-Eurasian land corridors, including the analysis of prospective goods nomenclature (in both directions).</p>
<p>To identify goods most likely to generate additional cargo flows along the China-EAEU-EU axis, including under the scenario of transport and logistics infrastructure development.</p>	<ul style="list-style-type: none"> • discrepancy of the requirements established by regulatory enactments (e.g. length of trains); • inadequacy of roads to international quality standards; • different gauges; • lack of safe and high-quality roadside infrastructure; • low capacity at international border crossing points; • insufficiently harmonized procedures for crossing borders; • duration of customs and border clearance of goods; • specific regulations within the bilateral intergovernmental agreements (quoting of transportations, restriction of a choice of routes) etc. 	<p>To identify the potential interest of the EU investors in transport projects on the territory of the EAEU as well as the EU participation in 'One Belt One Road' initiative.</p>
	<p>To propose policy recommendations for removing barriers to international freight transport.</p>	
	<p>To analyze the existing mechanisms of administrative support for international transportation (EAEU, EU and PRC), and how they affect the transportation tariff (for example, Chinese domestic subsidies). To assess the effect of the cancellation/introduction of administrative support measures (e.g., changing the cargo turnover, transfer of shippers to other modes of transport, other routes).</p>	

The methodology of the fast track paper would be to conduct surveys and interviews with representatives in the railway and logistics community.

The trans-Eurasian transport corridors have to be dedicated and only to transit from China to Europe and vice-versa, but first and foremost to the development of regional economies and the interlinkage between smaller regions. (Klepach)

EU – EAEU: aligning TBT and SPS policies

Non-tariff barriers to trade are more important these days than tariff barriers. The most important of these are technical standards for industrial products (TBT), food safety standards, or sanitary and phyto-sanitary standard regulations (SPS) and customs administration procedures.

Furthermore, regional trade in goods is also strongly affected by cross-cutting legal obligations for producers, including e.g. undertaking legal liability for damages and other consumer-protection measures. In Phase I of the IIASA project there was a single seminar on the TBT and SPS issues, but this was very preliminary, and did not really get to grips with the issues of EU-EAEU relations in this domain.

In recent years the EAEU has been taking on competences in NTB field, building on the GOST standards and gradually modernizing their content. An important part of this modernization process has been an increasing convergence on international (ISO) and European standards. There are also some common standards set by the UN Economic Commission for Europe (UNECE), notably for the automobile sector.

This convergence is of course fundamental for removal of trade barriers, but it is not all. There are further important matters of certification of conformity and cooperation between accredited agencies. The Association of European Businesses (AEB) in Moscow reports on constant struggles for these procedures to work smoothly.

Against this background the work in Phase I of the IIASA project did not clarify two important issues:

Convergence of EAEU and EU TBT/SPS. How far and fast, concretely, is the convergence process between the EAEU and international/European standards progressing? This is a simple question to pose, but the answer requires an understanding of work on hundreds and thousands of standards, and is very difficult to synthesize. The earlier informal expert work between the EU and Russia could usefully be reviewed as a starting point. An in-depth study should be commissioned on how far the ongoing convergence process actually advances with experts familiar with Russian/EAEU and EU regulatory regimes, respectively. New models of cooperation over certification of conformity should be reviewed, as for example in the recent EU-Canada CETA agreement. On this basis alternative scenarios should be identified for constructive progress between the EU, EAEU and other CIS countries for when the time is ripe.

TBT & SPS between the DCFTA states and other CIS states. How will the adoption of European standards by the DCFTA states affect trade with EAEU states, going beyond the status quo where GOST standards prevail? This question was explored in a trilateral consultative process between the EU, Ukraine and Russia in 2014 and 2015. But the process failed due to its high politicization. Various formulae for compatibility should be reviewed, including the model case where based on progress in harmonization, individual exporting enterprises in CIS countries are able to gain recognition for their products in both the EU and EAEU.

In conclusion the subject of TBT and SPS could profit from an in-depth 'track 2' sub-project under Phase II to examine technical possibilities for convergence between the EU and EAEU. This would need work by a small team, with a first deadline for output by November 2017, while a full year will be needed to mature the results. The primary model of work would be through in-depth discussions with TBT/SPS officials in the European Commission and Eurasian Economic Commission, with the involvement of external experts, as necessary. This should at least at first be done bilaterally by the team interviewing officials in Brussels and Moscow. On the basis of draft papers, there should be meetings at IIASA. In addition Belarus has significant export capacity in both engineering and agri-food products (i.e. TBT and SPS sensitive products, unlike commodity trade), and their officials might have useful insights to offer.

The question of inviting officials from both Brussels and Moscow together at IIASA should be approached cautiously step by step, given the failure of the EU-Ukraine-Russia trilateral process of 2014-15, which had tried to address these same issues.

Customs facilitation is another important aspect of the harmonization and decreasing of non-tariff barriers between the two unions (Movchan)

Industry 4.0

Joint research and partnership in the development of "Industry 4.0" was pointed out by the participants of the high-level meeting as an additional, so far underrated, yet very important sector of potential cooperation between the EU and the EAEU which should be explored.

Both German and Russian companies are very interested in cooperating in the development of the rising digital economy. This goes beyond the pure technology transfer that is sought after by the Eurasian side in the common economic space, as mentioned above. (Schneider; Sergeev; Klepach)

Industry 4.0 is a name for the current trend of automation and data exchange in manufacturing technologies. It includes cyber-physical systems, the Internet of things, cloud computing, blockchain economics and cognitive computing.

Industry 4.0 creates what has been called a "smart factory". Within the modular structured smart factories, cyber-physical systems monitor physical processes, create a virtual copy of the physical world and make decentralized decisions. Over the Internet of Things, cyber-physical systems communicate and cooperate with each other and with humans in real time, and via the Internet of Services, both internal and cross-organizational services are offered and used by participants of the value chain.

The term "Industrie 4.0" originates from a project in the high-tech strategy of the German government, which promotes the computerization of manufacturing. It was revived in 2011 at the Hannover Fair. In October 2012 the Working Group on Industry 4.0 presented a set of Industry 4.0 implementation recommendations to the German federal government.

Other fields for cooperation in this sphere include development of human capital, healthcare, education, pure water and waste management. Cybersecurity is another sphere of mutual interest. (Klepach; Sergeev).

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