

域の主な輸出品目は原油と石油製品（76%）、原木と木材製品（9%）、水産物（3%）、石炭（6%）だった。日本からの輸入において最も大きなシェアを占めるのは自動車と自動車部品（78%）だ。食料品は12%、消費財は12%である。

最近まで、ロシア東部地域における口日協力において、1970年代の互恵的関係に似た状況が構築されていた。1970年代当時、我々は共同で、西シベリアとヨーロッパを結ぶ石油パイプラインを建設し、ネリユングリ炭鉱を開発した。ポストチヌイ港を建設し、木材に関する口日代償協定を実施した。

「2013年までの極東・ザバイカル地域発展プログラム」に従って、国は極東地域の経済発展のために必要なインフラ整備に投資を始めた。現在、太平洋パイプラインの第一段階の2,700キロメートルのパイプラインも敷設され、コジミノ湾では石油積み出しターミナルの建設工事が始まった。サハリン州、イルクーツク州、サハ共和国での天然ガス鉱床の開発が見込まれる「東部ガスプログラム」も実施の段階に入ってきた。「エリガ」炭田の開発、鉄鋼クラスターおよび原子力産業クラスターを含む南ヤクートの総合開発が始まっている。これら施設へのアクセスを確保するため

に、ハバロフスク地方のソビエツカヤ・ガワニ～ワニノ物流拠点の形成も始まることになっている。

すなわち、ロシア東部で今後の口日交流のための条件が構築されている。しかしながら、2009年にはロシアと中国、韓国のみならず、日本との貿易額が甚だしく減少することは、現時点で明白になっている。

唯一、明るい見通しのある分野は、エネルギー資源の輸出だ。これはサハリン州で稼働を始めるLNGプラントに関連している。しかし、日本のエネルギー需要は、誰も予想がつかない。第4四半期に工業生産指標が下降し産業部門で電力消費が縮小して以降、日本のエネルギー需要は激減した。例を挙げれば、1974年の第1次オイルショックの頃の水準だ。

けれども、周知の通り、経済危機は損害のみならず、新しい可能性ももたらしているし、我々はそう期待する。ポスト危機時代に口日の経済貿易交流がどのような形態とスケールを獲得するかは、口日両国が連携してこの新しい可能性を探し、実施することができるかどうかにかかっている。

（文責：ERINA）

## *Keynote Address*

# *The Long-Term Strategy for the Development of Russia and the Far Eastern Region*

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## **Summary**

The formation of a market economy in the Russia of the 1990s accompanied a serious transitional recession, and that ended with the 1998 financial crisis. During the period from the crisis of 1998 up to autumn 2008, the Russian economy underwent stable development. During the period from 1998 to 2007, GDP increased 187%, industrial output 170%, and fixed capital investment 273%. The balance for the stabilization fund as of the beginning of 2008 had grown to 3.9 trillion rubles. In terms of gold and foreign currency reserves Russia came to rank third behind China and Japan.

Based on the capital accumulated during this time, in 2008 the Russian government formulated the "Concept of the Long-Term Socio-Economic Development of the Russian Federation up to 2020 (Concept 2020)". Due to the fact that exports built around raw materials have limitations, directions have been outlined for the diversification of the structure of the economy and the promotion of innovation. In this they are attempting to make the 2020 GRP of the Siberian and Far Eastern Federal Districts 2.5-2.6 times that in 2007.

In addition to the already-adopted "Federal Program on Economic and Social Development of the Far East and Zabaykalye up to 2013", work will soon end on formulating the "Strategy for the Socio-Economic Development of the Far East, the Republic of Buryatia, Zabaykalsk Krai and Irkutsk Oblast in the period up to 2025". What forms the basis for these

strategies and programs are the large-scale investment projects in traditional specialist sectors—namely the power generation, mining, fuel, timber, and heavy-machinery manufacturing industries, etc.—with an optimal use of the economic potential of the Asia-Pacific region and the border-region cooperation mechanisms.

The development of the Far East, based on rich natural resources, is only a basis which is comprehensive to a fault. On top of that the selection of a basic economic development model for the region is important. Of the inertial and innovative models, the latter is a model which assumes a diversification of the economy which takes the strengthening of human capital as its mainstay. If the region developed in accordance with this scenario, an economic growth rate of 260% up to the year 2020, proposed in "Concept 2020", could be realized. This would exceed the 230% growth rate for Russia as a whole.

Under the current crisis it is feared that its effect on the resource-based economy of the Far Eastern region will be more profound and drawn-out than the average for Russia as a whole. Consequently, the maximum possible maintaining of the presence of the Far East in the markets of East Asia is an immediate measure for mitigating any upheaval. To that end, a temporary elimination of export duties on exports of unprocessed raw materials is necessary. At the same time in the regions adjoining Northeast Asia, the stimulating of the establishment of high-technology enterprises, which specialize in high-level processing and the manufacturing of finished products, has become necessary.

Northeast Asia has long been a region attracting Russia's economic and political interest. In the last ten years the trade volume with China has grown 9.1-fold, with Japan 7.8-fold, and with the ROK 6.2-fold.

The countries of Northeast Asia comprise the greater part (approximately 75% in 2007) of the foreign trade of the Far East and Zabaykalye region, and the ties between this region and the countries of Northeast Asia could be said to be extremely strong. The trade volume with the countries of Northeast Asia for 2008 was in excess of US\$26.2 billion. Within the Far East and Zabaykalye region, the four regions of Sakhalin Oblast, Primorsky Krai, Khabarovsk Krai, and the Republic of Sakha are responsible for approximately 90% of foreign trade.

In the last ten years the structure of the commodities in the region's foreign trade has seen almost no change. What can be seen is that in recent years the export share of crude oil and petroleum products has expanded and the export share of logs and timber products has shrunk, and the steadily increasing trend in food imports over the last four years.

The foreign investment into the Russian Far East constitutes 5% of the total for Russia as a whole. In the period 2005-2007, foreign investment stayed level, and has maintained a level of approximately US\$6 billion. Broken down by region, more than 80% is directed toward Sakhalin Oblast.

In accordance with the "Federal Program on Economic and Social Development of the Far East and Zabaykalye up to 2013", the nation has begun investment in the development of the infrastructure necessary for the economic development of the Far Eastern region. Projects are underway, including the Pacific Ocean pipeline, the gas program for the eastern part of the country, the South Yakut comprehensive development, and the formation of the Sovetskaya Gavan-Vanino logistics hub.

As is well known, an economic crisis brings not only losses, but also new possibilities. What form and scale Russo-Japanese economic exchange acquires in the post-crisis period depends on whether the two countries coordinate and seek new possibilities, and are able to effectuate them.

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に中国の経済成長は減速しているが、依然として高い経済成長率をキープしている。2008年第4四半期の中国経済成長率は大きく下がり、2009年1月における経済成長率も減速した。しかし、近い将来における中国経済の見通しについて、私は楽観視している。2009年下半期には経済成長率が回復でき、年間成長率は8%（または8%以上）になると考える。

現在、すでにある程度信用が回復しており、株式市場も連日上昇している。設備投資も、金融機関の融資も増加し

ている。但し、対外貿易は依然として停滞しており、その回復はおそらく来年以降になると考える。中国経済回復の原動力となるのは内需拡大であり、対外貿易より内需によって経済成長が実現できる。日中韓三カ国は相互依存関係にあるので、中国経済の早期回復が実現できれば、日中韓にとっても、北東アジア地域全体にとっても、協力関係の更なる進展につながると考えられる。

（文責：ERINA）

## *Keynote Address*

# *A New Stage for Northeast Asian Cooperation*

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## **Summary**

On 13 December 2008 the Japan-China-ROK Trilateral Summit was held in Fukuoka. The first stand-alone Japan-China-ROK Trilateral Summit was one which illustrates the new trend in cooperation among the three nations. Agreement on regularizing the stand-alone Japan-China-ROK Trilateral Summit can be given as a distinguishing feature.

At the summit the further strengthening of cooperation among the three countries was affirmed, and as a result four documents were agreed upon. Notably the "Japan-China-ROK Action Plan" was announced, and with the effecting of commitments in concrete areas of cooperation, the fact that they agreed is of major importance.

In addition, the three countries were as one in the promoting of close coordination toward overcoming the current global economic crisis. That they agreed on the further promoting of economic growth, adherence to market economics, the avoidance of trade protectionism, aiming for the early conclusion of the WTO Doha Round, and a currency-swap deal, shows a genuinely cooperative will toward overcoming the global economic crisis.

As a basic recognition of Northeast Asian cooperation, if the trilateral cooperation by Japan, China, and the ROK progresses smoothly and plays a central role, then I think that Northeast Asian regional cooperation will be able to head in the right direction. Therefore, the three countries of Japan, China, and the ROK, in addition to overcoming issues relating to history, will have to stop fighting with one another over the right to leadership, seek a genuine cooperation among Japan, China, and the ROK, and further continue toward Northeast Asian regional cooperation.

Furthermore, when considering Northeast Asian regional cooperation, continuing forward in a format which is able to embrace as many sectors as possible in what can be called a "functional approach" is of importance.

The Chinese government, to keep to the bare minimum the influence on the global economic crisis, is putting together a variety of measures to stimulate the economy in order to expand domestic consumption. As the three countries of Japan, China, and the ROK have mutually-dependent relationships, if the Chinese economy is able to recover early, then for Japan, China, and the ROK also, and for the Northeast Asian region as a whole as well, it is thought that it will lead to further developments in cooperative relationships.

Yet further, this address is comprised of the following four matters:

- 1 . The developments in Japan-China-ROK cooperation
- 2 . The new trend in Japan-China-ROK cooperation
- 3 . Northeast Asian regional cooperation
- 4 . The role of China

(The responsibility for the wording of this piece lies with ERINA)

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て議論する大事なテーブルである。一方で、環日本海というリージョンのレベルにおいても、安全保障をめぐる問題は非常に大きな問題だろう。今の北朝鮮がどう出るかによって、直接影響を受けるのがこの地域である。たとえば漁船の拿捕をめぐる問題など、様々な問題を考える時に、安全保障問題はけっして軽視できないもので、しかも単に中央政府に任せれば済む問題ではない。そういう意味で一つの提案として、リージョナルな安全保障フォーラムを進めていき、安全保障をめぐる相互の理解を深めていったらどうだろうか。

東アジア共同体というものは非常に長いプロセスと、試行錯誤と、そして人間のクリエイティブな知恵をもって作り出していくものであろう。したがって、ある特定の固ま

りというものはない。EUをモデルにして、アジアがそれに近づくことはとうてい無理な話であり、そういう意味からいえば、中央レベルが軸になった日中韓の連携の枠組み、ASEANの枠組み、もう少しリージョナルな北東アジアネットワークあるいは北東アジアフォーラムという地域協力の枠組みを構想し、その連携が将来的に可能になると面白いと思う。

ASEAN+3+3、しかしこの最後の3はインド、ニュージーランド、オーストラリアではなく、3はロシア、モンゴル、北朝鮮ということに将来なるかもしれない。そういう意味でのASEAN+3+3というアイデアを、非常に無責任に思いつきの話として、私の講演とさせていただきます。

(文責: ERINA)

### *Keynote Address*

## *How to Construct an East Asian Community and the Northeast Asian Economic Subregion?*

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### **Summary**

The discussion within Japan related to the formation of an East Asian Community has been rather low-key. Within it, moreover, an opposing debate has emerged, viewing the formation of an East Asian Community as a means aimed at China's regional hegemony. Undoubtedly China's economic rise is spectacular, and a response along the lines of forming an anti-China front against this cannot be called wise. China herself too, amid the development of closer mutually-dependent global ties, has increased the degree she depends on the outside world. It can be said to be a situation which cannot be judged only from the perspective of old national interests.

In addition China's growth is continuing to widen the contradictions within the country. To solve such a problem also it is thought that China has no choice except to continue to strengthen links with the outside world. The question of an East Asian Community will be connected to how China understands her current circumstances and how she coordinates with others.

As typified by environmental problems, via the development of globalization the importance of regional initiatives has conversely been increasing. Also in the response to major natural disasters regional links are important. To respond to such issues, there is a need to tackle seriously the fostering of the human resources to be responsible for regional cooperation within Asia.

At present what could be called an East Asian Community is ASEAN only. Concerning discussion on a community for East Asia as a whole, there has occurred a clash of two ideas regarding the territorial extent thereof-ASEAN Plus Three (Japan, China, and the ROK) which China advocates, and ASEAN Plus Three Plus Three (Australia, New Zealand, and India) which Japan advocates. In such a situation, while the pushing of moves on overall integration is difficult, in terms of the three countries of Japan, China, and the ROK, I think cooperation is possible in the future, and also has the necessary territorial extent. If these three countries realize a systematic integration, the economic scale thereof will be one of the largest in the world, and ASEAN will probably be added to it. Furthermore it will lead to what is called the Northeast Asian Economic subregion continuing to form links with it.

I think that what Japan should contribute toward the formation of the Northeast Asian Economic subregion, dealing with Russia's natural resources and China's human resources, etc., is the formation of an intellectual network. In that case, not only Tokyo's, but also Niigata's role will be great. I think that the newly established University of Niigata Prefecture will be able to contribute to the formation of such an intellectual network.

From the security aspect, besides the currently ongoing six party talks on the DPRK's nuclear dispute, how about a concept of a regional "Japan Sea Security Forum" which discusses issues on a regional level? Not entrusting security issues to just central governments, but also a continuing deepening of mutual understanding at the regional level is important. The final "Three" of ASEAN Plus Three Plus Three could be Russia, Mongolia and the DPRK.

(The responsibility for the wording of this piece lies with ERINA)

[Translated by ERINA]