Проблемные аспекты энергетического сотрудничества между Россией и АСЕАН в контексте формирующегося рынка СПГ

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В данной статье анализируются ограничения и потенциал роста энергетического сотрудничества России со странами АСЕАН в сегменте сжиженного природного газа (СПГ) на фоне глобальных рыночных преобразований в 2022–2025 годах. Центральный тезис заключается в том, что потенциал спроса в Юго-Восточной Азии становится более структурированным и «видимым» благодаря увеличению импортных потоков и развитию инфраструктуры приема/регазификации. Однако осуществимость российских поставок определяется (1) логистическими ограничениями, связанными с санкциями, в цепочке поставок и (2) конкуренцией между поставщиками с устоявшимися контрактами и маршрутами. Сравнение официальных документов ЕС и США о санкциях, материалов АСЕАН по Трансасеанскому газопроводу (ТАГП) и отчетов Международного энергетического агентства и Международного газового союза (МГС) показывает, что региональная газовая интеграция в АСЕАН развивается по гибридной модели («трубопроводы + СПГ + виртуальная связь»), в то время как присутствие России в АСЕАН остается спорадическим. В выводах предлагаются сценарии, варьирующиеся от краткосрочной работы с «новыми импортерами» по спотовым/краткосрочным контрактам до среднесрочного сотрудничества в области инфраструктуры (терминалы, плавучие установки для хранения и регазификации СПГ, сервисные цепочки) и институциональной поддержки посредством соглашений между партнерами из ЕАЭС и АСЕАН.

Ключевые слова: СПГ, АСЕАН, Россия, энергетическая безопасность, санкции, логистика, Северный морской путь, ТАГП, конкуренция поставщиков.

Introduction and statement of the problem

After 2022, the reorientation of Russian energy flows to the East became an important response to reduced access to European markets and tighter regulatory restrictions. LNG differs from pipeline gas because its global logistics depend on fleets, insurance, port infrastructure and specialized equipment, making the supply chain particularly sensitive to sanctions [1]. The change in destination therefore does not automatically solve the problem of export access: the competitiveness of Russian LNG depends on the entire chain from liquefaction and shipping to regasification and settlement.

Southeast Asia is a promising direction for selective expansion of LNG exports because electricity and industrial demand are growing while domestic production is declining in several countries. At the same time, ASEAN is not a homogeneous market. Some states are emerging importers, some retain substantial domestic production, and others have limited receiving infrastructure. Therefore, the relevant task is to identify where new demand is measurable and what infrastructure and institutional conditions can turn it into sustainable contracts.

The objective is to identify the main problems and practical opportunities for Russia–ASEAN cooperation in the LNG segment amid market changes in 2022–2026.

The article addresses three tasks: to assess LNG import dynamics and receiving infrastructure in ASEAN; to identify sanctions, logistical, competitive and compliance barriers to Russian supplies; and to evaluate TAGP and EAEU mechanisms as possible channels for market access. Particular attention is paid to Vietnam, the Philippines and Singapore as markets with different combinations of import growth, infrastructure and institutional conditions. On this basis, realistic scenarios for expanding cooperation are proposed.

Methodology and source base

The study combines document analysis, comparative analysis of LNG statistics and scenario forecasting. Primary sources include EU and US sanctions documents, ASEAN materials on TAGP, IEA and IGU reports, Shell and Oxford Institute for Energy Studies materials, and Russian official data [1–5]. Market development is assessed through import growth, the emergence of new importing countries, regasification infrastructure and the priorities reflected in ASEAN energy policy. This approach makes it possible to distinguish between potential demand and demand already supported by infrastructure and actual import flows.

Energy Demand and LNG Infrastructure in ASEAN: From Potential to Measurable Dynamics

The gas balance of Southeast Asia is changing: regional demand is increasingly exceeding domestic production, strengthening the role of imports, including LNG, in energy security and power generation [2]. The 2023–2024 data show that demand is no longer only a forecast but has acquired measurable momentum. This is important for assessing Russia's prospects because a growing import requirement creates opportunities for additional suppliers, although the existence of demand alone does not guarantee access to the market.

Table 1
Dynamics of LNG imports by individual ASEAN countries (2023–2024), million tons (calculation 2023 = 2024 − increase; rounded to 0,01)

Country	2023	2024	Change
Vietnam	0,07	0,29	+0,22
Philippines	0,60	1,41	+0,81
Singapore	4,81	6,30	+1,49
Thailand	10,20	10,80	+0,60
Indonesia	0,00	2,02	+2,02
Malaysia	0,00	3,85	+3,85
Myanmar	0,00	0,00	0,00
Total for ASEAN	15,68	24,67	+8,99

Data source: IGU, World LNG Report 2025 (statistics for 2024). [3]

ASEAN Regional Gas Integration: TAGP as "Pipeline + LNG + Virtual Connectivity".

TAGP has evolved from a pipeline interconnection project into a broader regional framework. The 2002 memorandum envisaged connecting national gas systems through a network of interconnectors, while the 2025 protocol extended the concept of natural gas facilities to storage, LNG regasification terminals and virtual connectivity [7; 8]. The change is important because the regional gas market is increasingly based not on one infrastructure type but on a combination of pipelines, maritime LNG and flexible distribution chains.

For ASEAN, this hybrid model increases flexibility. Imported LNG can enter through terminals and then be redistributed by pipelines, small vessels or other transport modes depending on demand and available capacity. For external suppliers, however, the same system creates both opportunities and limits. Additional regasification capacity increases the number of entry points for LNG, while stronger internal interconnections may reduce dependence on seaborne

cargoes in particular markets [6; 8]. Russia is not a participant in TAGP, so its role is determined by the competitive environment created by the regional infrastructure.

Russia's position in the LNG market: logistics, supply geography and bottlenecks in supply chains

Russian LNG exports to Asia remain uneven. Arctic projects provide a significant resource base, but sanctions affect key links in the supply chain: Arc7 vessels, specialized equipment, shipbuilding capacity, insurance and classification services. These restrictions have delayed commissioning and reduced the predictability of some Arctic supplies [9]. Consequently, resource availability should not be confused with the ability to deliver cargoes under commercially acceptable conditions.

The Far Eastern route has a different profile. Sakhalin-2 operates in an area with substantially lower ice restrictions and has established experience in Asian deliveries [10]. This makes the Far East a practical starting point for flexible cooperation with ASEAN importers. Its limitation is the existing liquefaction capacity and long-term contractual commitments, which reduce the amount of gas available for new buyers.

The Northern Sea Route can shorten transit between Russia and East Asia compared with routes through the Suez Canal, but the advantage is conditional. Vessel ice class, seasonal navigation, insurance, legal requirements and the availability of suitable fleet capacity affect the final cost and reliability [11]. The NSR should therefore be treated as a strategic logistics option rather than an unconditional competitive advantage for all ASEAN deliveries.

Institutional and trade-economic framework Russia-ASEAN

Russia–ASEAN trade turnover increased by 5.8% in 2024 to approximately $23.2 billion, indicating continued economic interest despite external restrictions [14]. For energy cooperation, the significance of this figure is not only its size but the fact that LNG transactions are embedded in broader trade, investment, financial and settlement relations. A sustainable energy partnership therefore requires mechanisms that reduce transaction costs outside the physical supply chain as well.

The EAEU free trade agreement with Vietnam, in force since 2016, and the agreement with Indonesia signed in 2025 provide institutional channels for cooperation [12; 13]. They do not guarantee LNG supplies, but they can improve access to equipment and services, simplify procedures and create a more predictable environment for business dialogue. Their practical value is particularly relevant when sanctions fragment financial and logistical channels.

Sanctions and Competition: Why "There's Demand," But "Deals Are Difficult"

Sanctions affect Russian LNG through restrictions on investment, equipment, logistics and port operations. EU Regulation 2024/1745 introduced restrictions on certain operations involving Russian LNG, including transshipment through EU ports after the transition period [1]. The United States has also expanded measures against companies and chains associated with Russian Arctic projects, increasing the compliance burden for counterparties [14].

These restrictions influence not only the legality of individual transactions but also their commercial attractiveness. Banks, insurers, shipowners and energy companies may apply internal compliance requirements that go beyond formal prohibitions. As a result, a buyer in ASEAN can face additional costs or reputational risks even where Russian LNG imports are not directly prohibited by national law.

Competition reinforces this effect. Australia, Qatar and the United States have developed production, liquefaction, shipping and receiving infrastructure and possess large long-term contract portfolios [4; 9; 14]. They can offer buyers stable volumes and integrated commercial solutions. Russian suppliers operating under sanctions may have fewer options for long-term contracting and therefore rely more on spot or short-term transactions, which are less predictable for buyers.

Asian LNG pricing is also influenced by Japan, South Korea and China. These countries are not ASEAN members, but their demand and benchmark mechanisms affect regional price formation and competition for cargoes [15]. Thus, Russian supplies to Southeast Asia are competing not only with other exporters but also with demand centers that shape the wider Asian market.

Data for 2025: “first half” and “second half” (updating)

IEA assessments characterize 2025 as a transition period. Supply remained relatively tight and spot prices high during the first half, while additional LNG production in the second half improved resource availability and eased market conditions [16]. For price-sensitive ASEAN importers, such changes are important because periods of increased supply can open temporary windows for spot purchases and short-term contracts.

At the same time, the 2025 dynamics do not remove the structural constraints of the market. Buyers still prioritize reliability, transparent logistics and predictable settlements. Therefore, a temporary improvement in global LNG availability can facilitate individual Russian cargoes, but it does not by itself create a stable long-term market position.

Practical barriers for Russia in the ASEAN market (structuring)

The first barrier group is logistics and specialized fleets. Arctic projects such as Arctic LNG 2 require Arc7 ice-class tankers and access to specialized services. Sanctions against shipbuilding and insurance reduce fleet availability and make the timing of deliveries less predictable [9]. The Far Eastern route is less exposed to these constraints but has limited spare capacity because Sakhalin-2 is integrated into established contractual chains [10].

The second group is sanctions and financial compliance. EU restrictions on transshipment and US sanctions affecting Arctic-related entities narrow the number of acceptable logistics and financial schemes [1; 14]. ASEAN countries have not generally introduced unilateral bans on Russian LNG, but companies and banks may avoid transactions involving sanctioned vessels, entities or payment channels. This can make negotiations longer and long-term contracts harder to conclude.

The third barrier is supplier competition. Australia, Qatar and the United States combine established infrastructure with long-term contracts and a high degree of commercial predictability [4; 9; 14]. For ASEAN buyers, stability is important because many countries have limited ability to absorb sudden price or supply changes. Russian suppliers therefore need to compete not only on the cargo price but on delivery reliability and the overall cost of the transaction.

The fourth barrier is political and compliance risk. Major companies may impose internal restrictions stricter than formal legislation, including requirements concerning vessels, financial institutions and counterparties [14]. Specialized legal and industry reviews also note the growing importance of enhanced due diligence, which increases transaction time and costs. Together, these four groups explain why growing demand has not translated into a proportional increase in Russian market presence.

Where exactly is the "window of opportunity" in ASEAN (clarification of the composition of countries and examples)

The most promising markets should combine measurable import growth, receiving infrastructure and a comparatively open institutional environment. Vietnam and the Philippines stand out as growing importers: their LNG volumes increased from 0.07 to 0.29 million tonnes and from 0.60 to 1.41 million tonnes respectively in 2023–2024 [3]. These markets are important because a growing import base creates room for additional spot and short-term suppliers, particularly when global LNG availability improves.

Singapore represents a different opportunity. With 6.30 million tonnes of imports in 2024, it has developed receiving infrastructure and a regional hub function [3]. Its role is connected with the broader development of TAGP and virtual connectivity, which can support redistribution of LNG. Indonesia and Malaysia also recorded imports, but their domestic production and established contractual relationships limit the space for new suppliers. Thailand is the largest ASEAN LNG importer, at 10.80 million tonnes in 2024, yet its concentrated market and compliance sensitivity reduce the attractiveness of rapid Russian expansion [3; 14].

Myanmar did not import LNG in 2024, while Brunei, Laos and Cambodia do not provide a comparable combination of import demand and operating regasification infrastructure [3]. Consequently, the practical window for Russian LNG is concentrated in a small number of markets rather than ASEAN as a whole. Vietnam and the Philippines are the clearest growth markets, while Singapore offers a hub and infrastructure dimension.

Scenarios and tools for expanding Russia-ASEAN cooperation in LNG

Scenario forecasting identifies three trajectories based on the sanctions environment, ASEAN policy, import demand, TAGP development and EAEU institutional mechanisms. The scenarios are not predictions but alternative combinations of external conditions and corresponding Russian responses.

Scenario 1 — continued strict EU/US sanctions with ASEAN neutrality. This is the most realistic trajectory for 2026–2028. ASEAN countries do not formally join Western restrictions, but companies and banks remain cautious. Russia should therefore prioritize spot and short-term contracts with growing importers, especially Vietnam and the Philippines, use the Far Eastern logistics circuit and minimize dependence on the most constrained Arctic chains. Periods of greater LNG availability can be used to secure individual cargoes [10].

Scenario 2 — tougher ASEAN restrictions. If geopolitical pressure leads individual ASEAN states to introduce bans, certification requirements or port restrictions, direct LNG exports could become significantly more difficult. Russia should then shift emphasis from molecule sales to equipment and services for regasification, storage and virtual gas connectivity. EAEU agreements with Vietnam and Indonesia could support trade in related goods and services even if direct LNG deliveries are restricted [8; 12; 13].

Scenario 3 — partial normalization through preferential regimes. If Vietnam and Indonesia use EAEU agreements to facilitate energy trade and TAGP continues developing virtual connectivity, Russia could expand medium-term cooperation in 2027–2030. Priority areas would include preferential treatment for energy products, simplified technical and customs procedures, participation in terminals and FSRUs, storage and distribution systems, and joint projects with local energy companies [8; 12; 13].

Discussion: How sustainable is the "rate" demand for LNG in Southeast Asia?

ASEAN's LNG demand reflects the gap between rising gas consumption and declining domestic production. The region is expected to become a net gas importer by 2027, making LNG an important medium-term instrument of energy security

[2; 4]. This provides a structural basis for import demand, but it does not mean that every additional supplier will gain market share. Access remains dependent on price, infrastructure, contracts and political risk.

The region also faces the problem of price volatility. Markets with a high share of spot purchases are especially exposed to global price changes, while high LNG prices can encourage temporary coal use and, over a longer period, investment in nuclear and renewable energy [2; 16]. ASEAN is therefore likely to retain LNG while simultaneously diversifying its generation structure and increasing the role of long-term contracts. For Russia, this means that demand is potentially durable but the available market window can shift between spot opportunities and longer-term infrastructure-based cooperation.

Conclusion

The ASEAN LNG market is developing through measurable import growth and the expansion of regional gas infrastructure. The 2025 TAGP protocol confirms a broader hybrid model combining pipelines, LNG facilities and virtual connectivity [3; 8]. For Russia, however, the main obstacle is not the absence of demand but the combination of sanctions, specialized-fleet constraints, logistics risks and strong competition from established suppliers. The most realistic path for 2026–2028 is selective expansion through Far Eastern logistics and spot or short-term supplies to growing importers such as Vietnam and the Philippines, combined with participation in receiving infrastructure and the use of EAEU preferential mechanisms. This approach cannot remove external restrictions, but it can preserve market access and create a foundation for broader cooperation if regional conditions become more favorable.

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Problematic aspects of energy cooperation between Russia and Asean in the context of the emerging lng market

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This article analyzes the limitations and growth potential of Russia's energy cooperation with ASEAN countries in the liquefied natural gas (LNG) segment against the backdrop of global market transformations in 2022–2025. The central thesis is that demand potential in Southeast Asia is becoming more structured and "visible" through increased import flows and the development of receiving/regasification infrastructure. However, the feasibility of Russian supplies is determined by (1) sanctions-related logistical constraints on the supply chain and (2) competition among suppliers with established contracts and routes. A comparison of official EU and US sanctions documents, ASEAN materials on Trans-ASEAN Gas Pipeline (TAGP), and reports from the International Energy Agency and International Gas Union (IGU) demonstrates that regional gas integration in ASEAN is developing according to a hybrid model ("pipelines + LNG + virtual connectivity"), while Russia's presence in ASEAN remains sporadic. The conclusions propose scenarios ranging from short-term work with "new importers" on spot/short-term contracts to medium-term infrastructure cooperation (terminals, FSRUs, service chains) and institutional support through agreements between the EAEU and ASEAN partners.

Keywords: LNG, ASEAN, Russia, energy security, sanctions, logistics, Northern Sea Route, TAGP, supplier competition.

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