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Article



Natalia Sergeevna Rumyanskaya

Institute of Service and Entrepreneurship (branch) of DSTU
Candidate of Technical Sciences, Associate Professor

Artur Aleksandrovich Blagorodov

Institute of Service and Entrepreneurship (branch) of DSTU
postgraduate student

Yulia Igorevna Prokhorova

Institute of Service and Entrepreneurship (branch) of DSTU
Bachelor

Svetlana Yurievna Korablina

LLC TsPOSN «Ortomoda»
Ph.D., Associate Professor, Deputy directors

Galina Yurievna Volkova

LLC TsPOSN «Ortomoda»
Doctor of Economics, Professor, General director
Moscow, Russia

FEATURES OF THE STRUCTURE OF INDUSTRIAL PRODUCTION IN THE RUSSIAN ARCTIC FOR ITS EFFICIENCY

Abstract: In this article, the authors examine the systemic and emerging challenges, risks, and opportunities for economic development, including sustainable development, in the Russian Arctic. An analysis of the characteristics, trends, and prospects for industrial production in the Russian Arctic is provided, revealing the problems and specific features of its operation. single-industry towns. Installed readiness The Russian Arctic regions are working to overcome current economic instability from a labor market perspective. The problems and prospects for creating conditions for the integrated use of raw materials in Arctic regions are examined and substantiated. The conditions and prospects for shift work transformation as a means of changing migration trends and developing the Arctic labor market are identified.

Key words: current issues, investment projects, global recessions, geopolitical processes, problems of increased costs, socio-economic processes, Arctic zones, economy of the Arctic Zone of the Russian Federation regions.

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Introduction

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To establish such aspects and justify the tasks, the following facts are relevant: which We relied

on V their own research and the results of which are reflected in this article, namely:

Firstly, the results of the consideration of the global and national levels influences on prospects development regions Arctic Zone of the Russian

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Federation, which Confirmed the potential for economic and associated socioeconomic growth for the Arctic Zone of the Russian Federation regions, the development of industrial production, and the mitigation of risks to increasing the primary exports of extractive regions. It should be noted that the current consequences of the SVO in Ukraine have increased the risks of realizing these promising opportunities, but the "pivot to the East" and the implementation of Russia's full-scale national economic policy support the preservation of the established potential.

secondly, the established preservation of the strategic goals for the development of the Arctic, the implementation of which is ensured by the accelerated implementation of a mechanism for increasing investment activity in the Arctic Zone of the Russian Federation;

thirdly, clarification essence politicians and practices state and corporate governance during the COVID-19 pandemic in the regions of the Russian Arctic pointed to the primacy of environmental issues, social responsibility, conjugated questions Climate change. This is fully consistent with the latest global trends in accelerating the implementation by enterprises of strategies to ensure sustainable development factors in the regions where they operate, including greening production, adhering to ethical standards, promoting regional economic growth, and corporate social responsibility.

These facts confirm significance chosen ones us wide the context of the study of the development of the Russian Arctic not only from the standpoint of achieving the economic indicators of specific enterprises and target indicators for the development of the Arctic established at the regional and national levels, but it is precisely in the context of movement within the framework of a global strategy for the development of the oil and gas, mining, and metallurgical businesses, taking into account risks, possibilities, a also new roles V public stabilization in the context of the COVID-19 pandemic and growing geopolitical tensions.

This broad context naturally indicates the scale of the new tasks that must be taken into account, namely:

- on the one hand, updating the risks and opportunities for greening production and social responsibility for enterprises in the Arctic Zone of the Russian Federation;
- on the other hand, the supporting role of the state as a regulator conditions for development business initiatives private sector V the Arctic is intensifying possibilities development and influence business on socio-economic processes, but simultaneously forms restrictions development business, necessity provision complex measures security—epidemiological and environmental,
- on the third hand, the need to achieve

strategic development goals Arctic Zone of the Russian Federation, fixed V complex strategic indicators development of the Arctic Zone of the Russian Federation, including demographic ones, the probability of achieving which we justify as low (the main target indicators are reflected in the Arctic Zone Development Strategy, the Program of the Russian Federation "Socio-Economic Development of the Arctic Zone of the Russian Federation". With taking into account the above us was ahead to decide first, namely: to find out the conditions for sustainable development of the Russian Arctic:

to establish the specifics of the structure of industrial production in the Russian Arctic.

In quality separate territories, demanding special organizations and legal regulation of economic development, the Arctic has fully entered V sphere state interests Russia only V Soviet time. In the first years of the establishment of the new government, several trade expeditions were conducted across the Kara Sea, which gave a powerful impetus to the development of regular Arctic shipping and demonstrated the importance of the Northern Sea Route (NSR) for the formation and exploitation of the economic potential of Siberia and the Far East. To fulfill this task, the North Siberian State Joint-Stock Company of Transport and Industry—the Northern Sea Route Combine (Komseverput)—was established in 1928. Its functions included not only ensuring navigation along the NSR but also the industrial development of Arctic territories blank and alloy forests by Siberian rivers, export cargo (grain, oil, products of the hunting and fishing industries, etc.), construction sawmills factories, new river and sea ports.

An even greater contribution to the development of industry and infrastructure in the Arctic contributed the Main control Northern sea paths (Glavsevmorput, GUSMP). It should be noted that before the creation of this organization in 1932, there were heated debates in the USSR between supporters of the construction of the transpolar railway "Great Northern Route", which was supposed to united transport system, related with Trans-Siberian and Amur-Ussuri iron roads and including river paths messages Siberia, highways and railway branches providing access to mineral deposits and supporters focal character development natural resources Arctic on basis development SMP. End discussions was laid down in 1932 at the First All-Union Conference on the Development and Deployment of Productive Forces of the North, where "the Northern Sea Route was chosen as a strategic direction for the development of the Arctic."

With the creation of the Main Directorate of the Northern Sea Route (Glavsevmorput), the USSR created a multifunctional organization that simultaneously organized and implemented state plans aimed at the economic development of vast

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Arctic territories. As part of the GUSMP mobilization program, construction of new ports began (for example, Ust -Lensky was founded in 1933). port, subsequently became village Tiksi, for him appeared the port villages of Ambarchik, Pevek, Dikson, Provideniya), airports, land routes, radio- and hydrometeorological stations, naval and aviation defense bases; training of personnel in various Arctic specialties began; scientific expeditions were carried out. Cost state budget on ensuring the activities of the State Emergency Service of the Russian Federation only for first five-year plan his existence amounted to 922 million rub. In result such powerful support already during the first navigation, conducted in 1935 according to a unified plan, the volume of transportation by SMP compiled 585 thousand T, V that time how for preceding creation GUSMP Soviet period total volume transportation compiled total 545 thousand tons

In addition to the development of the NSR and the corresponding infrastructure, the tasks of the Main Directorate of the Northern Sea Route Also entered responsibilities conducting geological prospecting and other exploration work for the comprehensive study and subsequent development of the Arctic's natural resources. Thanks to the discovery of mineral deposits fossils, already V 1930s gg. Here were formed first "hotbeds" of industry: the Apatit mining and chemical trust (1929) and the mining and metallurgical plant Severonikel on Kola peninsula (1939); mines No. 1 And No. 2 Vorkutaugol plant (1931), mining oil and stone coal V swimming pools Ukhta and Pechora; Norilsk Copper-Nickel Plant on Taimyr (1935); enterprises for the development of coal, tin and gold deposits of the Kolyma -Indigirka edges and Chukotka.

Main part

In the post-war years, industrial exploitation of previously existing resources began in the Arctic. And again, open deposits useful fossils, what until almost the end of the 20th century, this ensured the growth of industrialization in this macro-region. The most outstanding events were the discovery in the 1950s and 1960s of the Timan-Pechora and West Siberian oil and gas provinces, which formed the basis of the country's fuel mineral resource base (in the Tyumen region alone, 28 oil and 27 gas fields were discovered in the first half of the 1960s). And huge resources offshore gas Barents and Kara Seas in 1970s–1980s these and other discoveries contributed to the formation of an industrial economic model in the northern territories, in which the extraction of fuel and mineral resources occupied a dominant position. Large territorial production complexes created in the USSR (Murmansk, Timan-Pechora, North Yenisei, West Siberian TPK still represents today by yourself industrial frame Russian Arctic zones. According to the calculations of V. N. Leksin and B. N. Porfiryev,

“during the Soviet development of the Arctic, more than 80% of the resources used to one degree or another were created V the present time of its national wealth.

With the onset of perestroika, economic activity in the Arctic slowed significantly, and after the collapse of the USSR, a profound socioeconomic crisis began here, as throughout the post-Soviet space. The logistics system for the Arctic territories was effectively eliminated. Centralized budget financing was replaced in all areas by mixed funding, which, given the lack of companies' own funds, led to the curtailment of many production programs. The Arctic transportation system, which had always been supported by the state, began to crumble. states, which ultimately led to the loss of transport companies, the closure of ports, polar stations and civil aviation airfields, a reduction in the volume of repair work on various infrastructure facilities, etc. period market transformations (1990–1999 gg.) investments V the Arctic has shrunk by almost 5 times, and industrial volumes have decreased by more than third. Let's note the following feature: investment decline was more significant, how V average by country, a reduction in production - on the contrary (Figure 1), which is explained by the relative simplicity of the extractive industry economy. Like this thus, the Arctic regions became “a kind of buffer, mitigating the negative consequences of the decline in production in the country.”

In beginning 2000s gg. because of continuous and long-term growth world prices for oil and gold, the situation in the Russian Arctic, as in the country as a whole, it began to change radically. Infrastructure began to develop projects, get comfortable new deposits, But V The changes affected the regions with a raw materials export-oriented economic model to the greatest extent on oil- and gold mining. So, favorable situation on world energy market conditioned start active prey oil in Nenets autonomous district, as a result what economy region right up to offensive global financial crisis demonstrated outstanding performance growth: for 2000–2018, the volume of gross regional product the district grew more how V 8 once (medium annual pace growth GRP compiled about 17.6 %), production industrial products — 3.5 times, and investment inflows increased by 11.7 times. In the Chukotka Autonomous Okrug, for example, during this period, the development of large gold and silver deposits began, which by 2018 made it possible to increase production volumes comparison since 2005 in 5.9 times. Note that what's in other regions Arctic zones pace growth industrial production and investments did not exceed the Russian average. In subsequent years, the development of the Russian Arctic took place in conditions of instability. The global financial and economic crisis of 2018–2019, currency crisis 2021–2024 gg. brought to whole spectrum negative

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consequences for economy Russia: fall course ruble, height inflation (For example, V 2018 Inflation in the country exceeded 13%, and the core consumer price index was 113.6%), a reduction in gold and foreign

exchange reserves, and a large-scale capital outflow for line, decline practically in everyone industries economics, height unemployment, decline in real incomes of the population, etc.

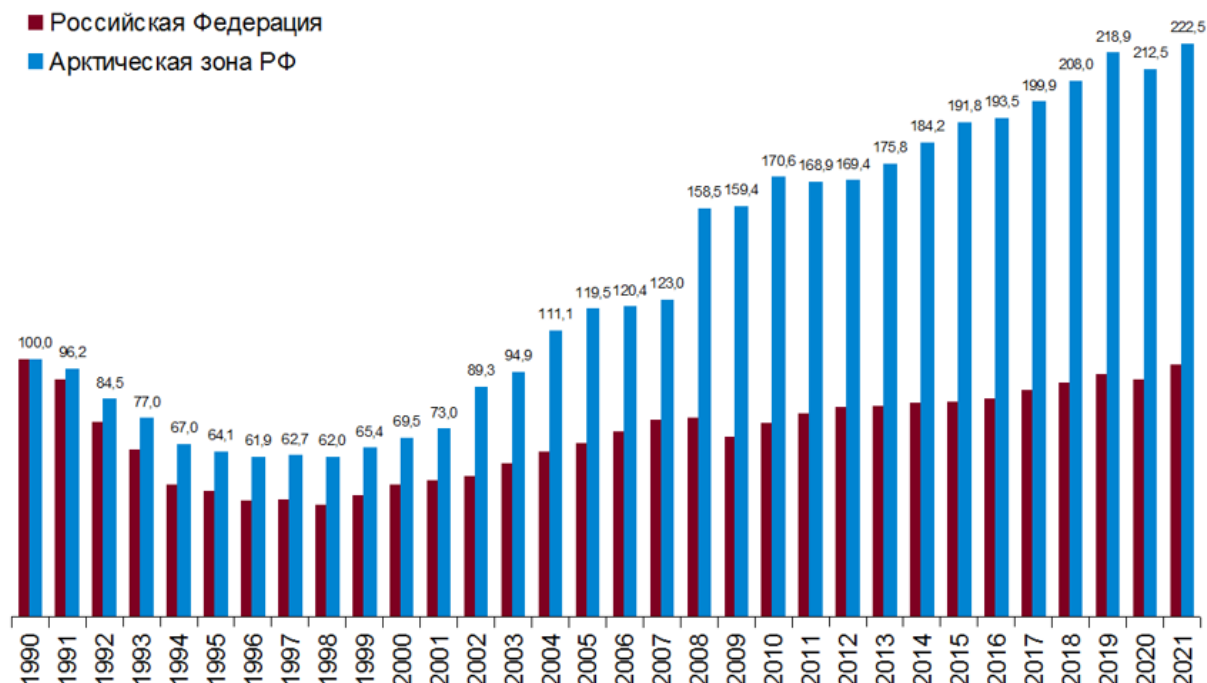


Рисунок 1. Динамика промышленного производства (1990 г. = 100 %).

The crisis has also affected most industries in the Arctic zone, but they, as before, have demonstrated greater resilience relative to national trends: during the 2018–2019 crisis, the industrial production index of all Arctic regions was higher than the same indicator for the country as a whole (90.7%), and the Nenets and Chukotka Autonomous Okrugs showed very significant growth (126.3 and 114.6%, respectively). According to renowned northern studies scholar V. S. Selin, this is due to special position industrial sectors Arctic zone in the economy of our country, which is predetermined by “the presence of long-term export contracts <...> and the relatively high investment attractiveness of individual industries and the Arctic regions as a whole.” Except Togo, exactly V this period were designated the first outlines of Russia's state policy in the Arctic, which envisage fundamental changes in the further development of Arctic territories, including “extension resource bases, providing needs countries in hydrocarbon resources and other types of strategic raw materials.”

The results of our previous study of structural features development industry Arctic zones in confirming the resilience of Arctic industrial production to external shocks this period: despite enough the strong (much stronger than the national

average) structural fluctuations that caused the crises did not have any significant impact on the Arctic industry. Thus, calculations indices Kazintsa (I_K) and Ryabtseva (I_R), evaluating average deviation from each other of the specific weights of elements in the analyzed structure and the level of scale changes structures in time respectively, showed, what's in period first waves world crisis V added cost industrial production in the Arctic zone showed a “significant” deviation in the share ratios industrial species activities, V That time how, in the country as a whole, structural changes were “insignificant”, while there were no significant changes structures gross additional cost (VDS) neither in the first nor in the second case did it happen (Table 1). More strong fluctuations were observed in time crisis V investment sphere Arctic zones, however, this practically no way Not influenced on the structure of investments directed towards industrial production. Among the Arctic regions “significant” changes structures investments V this period were characteristic only for Republics Karelia for check significant influx of capital investment V development hydropower and Republics Sakha (Yakutia), where it continued financing project construction oil pipeline “Eastern Siberia - Pacific Ocean” (the project has been implemented since 2004).

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Overall, for 2003–2024, the structure of GVA of industrial production in the Arctic zones practically not has changed, although V her and there were “significant” structural fluctuations (Table 1). They were mainly were due to the transformation of the structure of the GVA of the Murmansk region (*I R* GRP 2005–2016 = 0.377; *I K* GRP 2005–2016 = 9,831), Chukotka Autonomous Okrug (*I R* GRP 2005–2016 = 0.675; *I K* GRP 2005–2016 = 24,252), Krasnoyarsk edges (*I R* GRP 2005–2016 = 0.260; *I K* GRP 2005–2016 = 12,452). Moreover, if the structure of the VAT of the Murmansk region has changed for check abbreviations production V processing sector (for 2005–2016 gg. weight structural shift amounted to -16.3 p. etc.), that on in Chukotka and Krasnoyarsk Krai, economic transformations were driven by the onset of more active subsoil use (the structural shift in mineral extraction in the regions amounted to +41.7 and +15.3 percentage points, respectively). It's worth noting that in the latter regions, the structure of investment directed to the industrial sector also demonstrated "significant" differences: V Krasnoyarsk edge share capital investments, directed V prey, increased with 6.9 to 15.5 % (+8.6 p. etc.), V Chukotka autonomous district - With 0.3 to 34.7 % (+34.4 p. p.). Promotion shares mining sectors V this the period was also observed in the Republic of

Yakutia (Sakha) (+11.6 percentage points), Murmansk region (+4.8 p. etc.), Republic Komi (+0.6 p. p.) and Nenets autonomous district (+0.5 p. etc.), what and determined positive dynamics shift by to this foreign trade activity in the Arctic zone as a whole (+7.9 percentage points). In turn, the negative shift in the manufacturing sector of the Arctic (-0.2 percentage points) was due to a decrease his specific weights V structure VAT of all arctic regions, for with the exception of the Komi Republic (+0.1 percentage points). It should be noted that in the country as a whole for these two types economic activities was noted negative dynamics (-1.9 and -1.5 percentage points, respectively). Similar calculations for 2018–2024 gg. showed, what V this in this period, a “significant” level of structural differences in the added value created by the industrial sector was characteristic only of the Murmansk region. (*I R* GRP 2017–2020 = 0.487), where "strong" shift (*I K* GRP 2017–2020 = 11,840) caused an increase shares processing industry (weight shift amounted to +23.1 p. p.) along with decrease specific weights the rest species industrial activities (V in particular, weight shift prey useful fossils amounted to -4.9 p.p). In the rest regions noticeable changes not happened, what and determined "short" level structural differences by Arctic zone as a whole (Table 2).

Table 1. Coefficients structural shifts (*I K*) And differences structures (*I R*) added cost of industrial production in 2005–2024

Subject	2005 G.	2007	2008	2009	2018 G.	2019 G.	2020 G.	2021 G.	2022 y.	2023 G.	2024 G.
TO previous year											
Russian Federation*	0.569	0.911	0.469	1,634	0.707	0.497	0.370	0.245	0.436	0.545	0.208
Arctic Russian Federation zone *	1,879	0.887	3,655	0.709	2,725	0.733	0.707	0.324	0.271	1,231	0.985
Russian Federation **	0.022	0.035	0.018	0.068	0.030	0.020	0.015	0.010	0.019	0.023	0.009
Arctic Russian Federation zone **	0.049	0.024	0.098	0.019	0.067	0.017	0.016	0.008	0.006	0.028	0.021
By 2005											
Russian Federation*	0.569	1,465	1,745	2,121	1,515	1,034	1,155	1,378	1,718	1,203	1,408
Arctic Russian Federation zone *	1,879	2,759	1,740	2,371	2,998	3,539	3,725	3,781	3,583	4,315	5,197
Russian Federation **	0.022	0.056	0.068	0.086	0.060	0.040	0.046	0.055	0.070	0.048	0.056
Arctic Russian Federation zone **	0.049	0.073	0.044	0.061	0.072	0.085	0.090	0.092	0.087	0.102	0.120

Table 2. Values coefficients structural shifts (*I K*) And differences structures (*I R*) added value of industrial production in 2018–2024.

Subject	2018	2022	2024	2018	2022	2024
	To previous year			To 2017 G.		

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Index Kazintsa (I K)						
Russian Federation	0.935	0.361	1,508	0.935	0.822	0.849
Arctic Russian Federation zone	0.797	0.556	1,639	0.797	1,272	1,811
Index Ryabtseva (I R)						
Russian Federation	0.043	0.016	0.072	0.043	0.038	0.041
Arctic Russian Federation zone	0.021	0.014	0.042	0.021	0.033	0.048

Like this in this way, obviously, what prey and processing useful fossil fuels have been and remain the dominant and most attractive sector of the Arctic zone economy for investment, demonstrating great sustainability to external shocks, happening V ours country with 1990s years. To further increase investment activity in the Arctic in 2024, accepted law, providing for various preferences — tax and administrative - for investment projects implemented here, first of all total oil and gas²⁸. In particular, by law provided transition to taxation of additional income²⁹ from the extraction of hydrocarbon raw materials in the north of Yakutia, the Taimyr Peninsula and Chukotka, as well as a 12-year exemption from paying the mineral extraction tax (under the effect of these benefits get there three Yamal project JSC NOVATEK — "Arctic LNG -1, Arctic SPG-2 and "Obsky" LNG") and provision tax deduction by it is for the Vankor cluster (Krasnoyarsk Krai), which is being developed by Rosneft Oil Company. It is worth noting that the Yamal projects are currently the most promising for the development of the Arctic zone. More than 40 projects, approved as priorities by the State Commission for Arctic Development, are already being implemented or are planned for implementation here, namely:

within the framework of the Yamal megaproject (PJSC Gazprom), the Bovanenkovo and Kharasavey oil and gas condensate fields are being developed;

Within the framework of the Yamal LNG project (OAO NOVATEK), a plant was built for production liquefied natural gas (LNG), international Sabbeta Airport and Seaport;

- joint efforts of the Government of the Russian Federation, the Government of the Yamalo-Nenets autonomous districts, PJSC Gazprom, JSC Russian Railways and JSC the development Corporation began construction of the Northern Latitudinal Passage (NLP) railway line, but in November 2024 it was suspended due to the impossibility of implementing concession agreements;

- As part of the Arctic LNG 2 project (NOVATEK OJSC), a plant is being built for the production, storage and shipment of LNG and stable gas condensate (SGC), consisting out of three technological lines, built Utrenny Airport, construction of a terminal of the same name is planned, etc.

Such large-scale investment projects do not have immediate economic viability, so the initiative and leading coordinating role in their implementation should undoubtedly belong to the state. However, as has been rightly noted, in A. Kryukov and I'M IN. Kryukov, V basis economy Arctic and the industrial development of its mineral resource base must be based on the cooperation of various participants in the economic activity process, including foreign ones. In that same time, no follows forget, what the possibilities of cooperation with foreign companies depend not so much on internal factors, how many from geopolitical and geoeconomic environment. For example, in 1990s — beginning 2000s gg. American companies accepted the most active participation V Russian oil and gas projects, equipping their not only investments, but also advanced management and the latest technologies. Participation in the development of Russian subsoil resources was in fact a condition for ensuring energy security for USA Togo period — largest importer energy resources. However, the development of shale oil production technologies (the "shale revolution" V 2018 g.) forced American companies look for alternative markets sales, from which the most promising is European, but exit on which was possible only for check restrictions presence their Russian companies.

In in the end this determined shift strategic priorities USA V sphere provision energy security — from cooperation with Russia to increase tensions using the events in Ukraine in 2014 as a formal occasion for introduction sanctions. Because of sanctions foreign oil and gas companies were forced to abandon joint projects in the Arctic or significantly reduce their participation in their implementation. For example, the American company ExxonMobil came out from joint with Rosneft project V Karsky sea, what, however, subsequently brought to her huge losses (losses companies in 2021 alone amounted to \$1 billion). New phase total economic restrictions by political motives for Russia began V 2022 G., but decrease volumes export V the unfriendly countries were offset by a significant rise in prices on global energy markets. Despite the existing tensions, international cooperation in the Arctic continues. In recent years, the Russian-Chinese partnership has particularly increased, as evidenced by the active implementation Yamal LNG project together with China National Petroleum Corporation and the Silk Road Fund Co Ltd. This suggests that in

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the medium term, there will be no objective reasons for a significant decline in production in the Arctic, and investment activity will remain at its current level.

Conclusion

The specific structure of industrial production in the Russian Arctic has been established. The results of the study indicate significant differences in the dynamics of the structural features of industrial development in the Arctic Zone regions of the Russian Federation in the periods examined. Moreover, in the period 2017–2020 gg., characterized by conducting active Arctic policies, a “significant” level of structural differences in the added value created industrial sector, was inherent only Murmansk region, where a “strong” shift was caused by an increase in the share of the manufacturing industry (the shift amounted to +23.1 percentage points) along with a decrease in the share of the rest species industrial activities (V in particular, weight shift mineral extraction was -4.9 percentage points). In the remaining regions, there were no noticeable changes, which determined the “low” level of structural differences. By Arctic zone V in general. Like this in this way, obviously, what extraction and processing useful fossils was and remains dominant and the most attractive sector of the Arctic zone

economy for investment, which demonstrates big stability to external shocks, happening in our country since the 1990s.

For subsequent increases investment activities V Arctic V 2020 G. was accepted law, which provides for various tax and administrative preferences for investment projects implemented here, before total oil and gas. In many ways this initiated large-scale investment projects V Russian Arctic on basis cooperatives various participants process economic activities, V volume number at active the role of the state and foreign companies (the latter factor created certain risks to the sustainable development of industrial production in the Arctic).

A new phase of total economic restrictions for political reasons for Russia began V 2022 G., however decrease volumes export V unfriendly countries was compensated significant growth Global energy prices. Despite the current tensions, international cooperation in the Arctic continues. In recent years, the Russian-Chinese partnership has grown significantly, as evidenced by the active implementation of the Yamal LNG project in partnership with the China National Petroleum Corporation and the Silk Road Fund Co Ltd.

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	GIF (Australia)	= 0.564	ESJI (KZ)	= 8.100	IBI (India)	= 4.260
	JIF	= 1.500	SJIF (Morocco)	= 6.004	OAJI (USA)	= 0.350

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