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Russia's Geopolitical Position in the Arctic: What's New?

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Abstract

This paper examines the recent transformation of Russia's geopolitical position in the Arctic in light of its 2022 invasion of Ukraine and the subsequent Western sanctions. The analysis is structured around five pillars: the war's impact on Russia's Arctic economy, including the hydrocarbon sector and changes in the operations of the Northern Sea Route; the implications for the Arctic environment and climate policy; Russia's 'Pivot to Asia 2.0' and the evolving Russia–China partnership; and the overall consequences for Russia's Arctic strategy and international cooperation. This paper argues that the Russian decision to invade Ukraine has rendered its long-standing Arctic strategy ineffective and that this will require the country to significantly reconsider its strategic calculations.

Introduction

Russia is the largest country in the Arctic region, controlling over 53 per cent of the Arctic Ocean coastline. As such, Russia plays an important role in the whole region's development. With an area of 4.8 million square metres, the Russian Arctic Zone makes up about 35 per cent of the country's territory. The Arctic has a central place in Russia's economy, security, foreign policy and identity.[1]

Russia's full-scale invasion of Ukraine in February 2022 caused global upheaval, triggering a significant shift in the strategic calculations of the Arctic nations, particularly those bordering Russia. This led to renewed concerns about Moscow's intentions and actions. Finland and Sweden, traditionally non-aligned, reconsidered their stances, with both countries seeking and acquiring NATO membership, while old NATO countries bolstered their defence readiness and increased military cooperation. Western countries imposed sanctions on Russia, targeting the Russian economy with the aim of reducing the financing of Russia's military capabilities. The relations between Russia and the other Arctic states deteriorated to the point where the survival of collaborative governance mechanisms, such as the Arctic Council, were in doubt, and Russia exited the cooperation in the Barents Euro-Arctic Region. This article will discuss how the changing circumstances have been reflected in official Russian documents and plans, as well as in concrete developments in the Russian Arctic.

Russia's Arctic policy plans

Russia's Arctic policy has been laid out in several key documents. The most recent overarching policy document, *Basic Principles of State Policy of the Russian Federation in the Arctic Until 2035* (*Basic Principles 2035*), was approved by President Putin in March 2020.[2] This document continued the focus of earlier documents on developing the Russian Arctic as a 'strategic resource base' for Russia's economic growth, reflecting its significant contribution to the national GDP and to exports and the goal of revitalising the Northern Sea Route (NSR). In addition, *Basic Principles 2035* emphasises sovereignty and territorial integrity in the region while also aiming to improve the well-being of Arctic residents. Following the invasion, in February 2023, changes were made to the document.[3] Notably, references to regional cooperation – the Arctic Council and the Euro-Arctic Barents Region – were deleted. Instead, the development of bilateral relations was emphasised. Clearly, this was alluding to increasing Russian interest in cooperation with non-Arctic states on Arctic issues. This included not only China, but also India and other states designated as 'friendly'.[4] The earlier formulation that the development of natural resources should be carried out 'with adherence to high ecological standards'[5] was replaced with 'in the interests of sustainable development of the Arctic'.[6] Although the new wording was inconspicuous in itself, the fact that the text was altered suggested a policy change with less weight given to environmental concerns.

The most significant change to Russia's official plans in the Arctic can be found in its updated Foreign Policy Concept, issued in March 2023.[7] The earlier version, issued in 2016, had highlighted 'maintaining peace, stability and constructive international cooperation', especially with the Arctic states. The new version divided the world into regions of geopolitical competition between the great powers, and it carved out the countries of the former Soviet Union as Russia's sphere of influence.[8] In a special section devoted to the Arctic, it adopted a much more assertive stance compared to the previous edition, aiming to 'reduce threats to national security in the Arctic'.[9] It also indicated four foreign policy priorities: first, issues exclusive to the purview of Arctic states, such as the 'delimitation of maritime spaces'; second, 'neutralising the course of unfriendly states towards the militarisation of the region and limiting Russia's ability to exercise its sovereign rights in the Arctic'; third, 'ensuring the unalterability' of the Russian interpretation of the law of the sea, including in regard to the NSR area; and fourth, 'establishing mutually beneficial cooperation with non-Arctic states'.[10] This shift reflected Russia's pivot towards cooperation with non-Arctic states such as China and India, as the other Arctic states were characterised as 'unfriendly'.

Economic development

Russia's plans for its Arctic economy are centred around the production and export of hydrocarbons, intertwined with the extensive development of maritime logistics: the NSR.

Hydrocarbons

Russia's Arctic economy is dominated by the production and export of hydrocarbons. Some 83 per cent of Russian gas production and 10 per cent of Russian oil production takes place in the Arctic.[11] A vast pipeline network was built in Soviet times to transport oil and gas to western Russia and to Europe. Oil and gas exports remained the backbone of the Russian economy.

As a result of Russia's war against Ukraine, the export volume of pipeline gas to Europe fell by some 80 per cent over the course of 2022.[12] European countries did not impose sanctions on purchases of Russian gas, but many importers stopped taking deliveries after Russia introduced sales conditions that they viewed as a breach of contract, while others refrained from renewing contracts that had expired. Russia's gas is no longer exported to EU countries via the Yamal–Europe pipeline, and transit via Ukraine fell to 25 per cent of contracted levels.[13] Finally, the explosion on the important Nord Stream pipeline under the Baltic Sea made further use of that channel impossible. As there were no alternative export outlets for large quantities of now superfluous gas because the pipelines only connect with western Russia and Europe and because domestic consumption could not take advantage of the new large volumes, production had to be cut. As a result, Gazprom's gas output fell by 103 bcm in 2022, down 20 per cent year-on-year, and it fell further by 36 bcm or 5 per cent year-on-year in 2023.[14]

Whereas gas exports have traditionally been distributed by way of pipelines, the production of liquefied natural gas (LNG) has caught the most international attention in recent years. To the surprise of many observers, the Yamal LNG project, situated on the eastern shore of the Yamal Peninsula, was completed on time in December 2017, within budget at approximately $27 billion. Along with the liquefaction plant in the port of Sabetta, 15 300-metre-long icebreaking LNG carriers were custom-built at the Daewoo Shipbuilding & Marine Engineering yard in South Korea to be owned and operated by international shipping consortia.[15] The plant rapidly reached its nameplate production capacity of 16.5 million tonnes per year and even exceeded that level by 20 per cent from the first three production units. It reached 21 million tonnes in 2022 after adding an extra unit. The Russian government was very supportive of the project, helping to finance port infrastructure and providing tax concessions.

The success of the project led to a reassessment of the role of LNG in Russia's overall gas strategy. Even though Russian pipeline gas exports had been increasing each year, the outlook for further growth in sales to Europe, the most lucrative market, looked bleak because of the stagnating demand. Pipeline exports to China (from fields in East Siberia not connected to the Western-oriented pipeline network) were becoming important in volume terms, but were not as profitable as sales to Europe. LNG, on the contrary, offered access to premium markets worldwide. The gas fields located in the Arctic made it

possible to direct exports both westwards and eastwards. The initial plan was to sell most of the gas in Asia, but because of the higher price in Europe, after the decline in Russian pipeline gas exports, almost all of this LNG has been sold in Europe since 2022. The majority owner of the Yamal LNG project, the privately owned gas company Novatek – along with foreign partners – earned huge windfall profits because of the extraordinarily high gas prices.

Western countries, except for the United States and the United Kingdom, did not initially introduce sanctions against Russian gas exports directly; instead, they restricted the sales of technology to LNG projects. This delayed the construction of a second large LNG project: Arctic LNG 2. However, in November 2023, the United States announced sanctions against deliveries of gas from this particular project and also against yards building gas carriers for Arctic LNG 2.[16] In May 2024, heavy-lift carriers involved in delivering components for Arctic LNG 2 were sanctioned.[17] Foreign partners TotalEnergies, two Chinese companies and a Japanese consortium that had contracted gas declared *force majeure* and withdrew.[18] Thus, there are uncertainties about both the technology and market access, as well as the further financing of Russian LNG. Whereas the first two production units of Arctic LNG 2 (trains) are functioning, further development of the project has been postponed.[19] There is a lack of storage and transportation capacity for the functioning production units[20], as Novatek will not receive the six tankers constructed for the project by Hanhwa Ocean in South Korea. Novatek has been able to develop its own medium- and large-scale liquefaction technologies[21], which, if successful, might replace Western technology.[22] Novatek even considered the construction of an LNG plant in Murmansk to export Gazprom's excess gas.[23] However, the delay in completing the Arctic LNG 2 project, as well as the postponement of other planned LNG projects in the Arctic, could undermine Russia's position as an LNG exporter over the longer term, as other producers around the world are filling up the LNG market with projects that may leave little room for Russia, even if sanctions were to be lifted at some point.

Further east on the Taymyr Peninsula, the state-dominated oil company Rosneft is developing what was set to become the biggest industrial project in the Arctic: the Vostok oil project. The project is in need of finance, and Rosneft, together with the government, has actively courted Chinese investors.[24] Rosneft had earlier talked with Indian companies, apparently without result.[25] The project's profitability will be strongly affected by the longevity and effectiveness of sanctions targeting sea-borne Russian oil. As is the case with the LNG projects, this project is also dependent on icebreaking tankers to be able to bring hydrocarbons to the market. Russia does not have the home-grown capacity to build such tankers. In August 2024, the United States announced sanctions, which also impacted this project and several other mineral extraction projects in Siberia.[26]

The Obskiy project illustrates the uncertain future of economic development in the Russian Arctic. The Obskiy gas and chemical complex was Novatek's third LNG project, located on the Yamal Peninsula. Due to problems with the fourth production unit for the Yamal LNG project, which would have used the same technology as Obskiy, in 2021, Novatek decided to switch Obskiy from an LNG project to a gas and chemical production facility producing ammonia and hydrogen. Just a few days before the invasion, Novatek was optimistic about the prospects of its projects.[27] However, the company faced difficulties sourcing the necessary technologies after the invasion, forcing an indefinite postponement of the Obskiy project.[28] Furthermore, ammonia produced at the Obskiy plant was intended for the European market, Novatek having secured contracts with Germany's chemical giant Uniper, whereas the Russian market is already saturated.[29] Before the war, Russia's largest ammonia producer, TogliattiAzot, relied on a pipeline from Togliatti to Ukraine's Odesa, where it was further transported by sea.[30] For the project to be furthered, Novatek will thus need to secure investment, find markets for its products and find a way to transport them to consumers, while at the same time evading US (and other) sanctions.[31] The company is considering not implementing carbon capture and storage and changing its hydrogen production to urea production.[32]

All of these challenges are a result of Russia's invasion of Ukraine. To summarise, all hydrocarbon projects in Russia have experienced serious problems. First, sanctions imposed on Russia have affected the operation of existing hydrocarbon projects in the Arctic due to problems with access to markets and the maintenance of their plants. Second, projects in the construction stage are more difficult or impossible to complete due to sanctions imposed on the delivery of already constructed equipment and means of transportation (ships). Third, projects in the planning stage will have difficulty finding investors due to uncertainty about construction and markets, making them uncompetitive in the global economy.

Northern Sea Route

The NSR remains an essential transport corridor for Russia, possessing geopolitical and geoeconomic significance, in addition to commercial potential. It connects the eastern and westernmost parts of the country and provides access to locations along the Arctic coast, which is essential for bringing supplies and equipment to remote project sites and ferrying out products. Moreover, the use of the sea route for international transit between the Pacific and the Atlantic that could bring business and income to Russia has been presented as a promising option, although many observers doubt the commercial potential for transit.[33]

As part of Russia's strategy in the Arctic, in 2018, President Putin set the goal of transporting 80 million tonnes of cargo by 2024. This was an unrealistic figure from the outset, but with the successful development of LNG projects, steep growth in traffic was

expected. The total volume in 2023 was around 36 million tonnes[34], consisting mainly of LNG and oil shipments. Increased reliance on the NSR for oil transport, not only from fields and terminals in the Arctic – Novy Port, Varandey and Prirazlomnoye – but also from the Baltic Sea, can be seen to be a result of the new geopolitical reality. Oil that was previously destined for Atlantic markets has since been re-routed to Asia via the NSR. Prior to 2023, crude oil was not shipped through the Arctic, with very few exceptions. The cost of using this transport route rather than selling the oil in more accessible markets is considerable. According to the newspaper *Kommersant*, 1.5 million tonnes of oil were shipped this way to China in 2023,[35] which is still under 1 per cent of Russia's total oil exports.[36]

International transit traffic between the Pacific and the Atlantic has always been marginal on the NSR, characterised by 'opportunistic' shipping, trials, repositioning and ballast.[37] However, starting in 2016, the giant Chinese shipping company COSCO set up a regular service with smaller combined bulk and container ships, with some 4–6 journeys each way annually.[38] In 2022, due to uncertainty caused by the sanctions imposed on Russia, this traffic came to a complete halt. [39] However, in 2023, a new Chinese company started small-scale container routes connecting Kaliningrad, Saint Petersburg and Arkhangelsk with Chinese ports.[40] The company plans to operate a year-round sea-rail container route between Moscow and China by way of Arkhangelsk by 2027.[41]

Strengthening the Russian icebreaker fleet is a key component of NSR policy and, indeed, of Russia's Arctic policies. The official plans for icebreaker construction did not change after the start of the war. Rosatom, the state nuclear power corporation, which since 2018 has overall responsibility for the NSR, including the nuclear icebreaker fleet, declared that technology sanctions imposed on Russia had not affected the construction of icebreakers.[42] Two 60-megawatt nuclear icebreakers were already under construction for delivery in 2024 and 2026, and contracts for two additional such icebreakers were signed in early 2023, with expected delivery in 2028 and 2030.[43] Construction of the new 120-megawatt super-icebreaker 'Lider' started in July 2021.

The ambitious icebreaker construction programme is directly connected to the expected rapid growth in cargo transport along the NSR. Thus, the NSR development plan adopted on August 1, 2022 envisaged 216 million tonnes of cargo by 2030 and 238 million tonnes by 2035.[44] These targets looked overly optimistic from the outset, but nevertheless, this became the point of reference for infrastructure planning. To accommodate this traffic, expanding the icebreaker fleet was an absolute necessity. Yet, at the same time, the increased cargo traffic was an essential part of the financing for the icebreaker programme.

The development plan comprised more than 150 projects, especially those focusing on transport infrastructure. The projects had been planned long before February 2022,

including the Utrenniy LNG terminal for the Arctic LNG 2 project, the Bukhta Sever oil loading terminal for the Vostok Oil project and the Yenisei coal terminal for the Syradasai project. In addition, the plan provided for the construction of coastal and hydraulic structures to supply the Baimskoye copper field, the creation of trans-shipment ports for LNG on Kamchatka and near Murmansk, and a hub port for organising container transit shipments in Vladivostok.

As indicated above, the implementation of these projects must now be seriously questioned. Even if the official Russian position is that the goals in the plan will be met, Putin himself admitted soon after the war began that the implementation of projects was beset by problems in the wake of sanctions. In a meeting in April 2022 with ministers and governors of the Arctic regions, he announced that projects would have to be adjusted and that non-standard solutions 'for financing, technologies, supply of materials, construction equipment and components' would be needed; in other words, solutions to circumvent sanctions.[45] Another task was to re-route Russian hydrocarbons originally destined for the European markets, which was to be achieved by increasing domestic consumption and 'also increasing the supply of energy resources to other regions of the world', especially 'extra-regional states and associations' – hinting at China and India.[46]

It is quite apparent that the original volume targets cannot be met, but the government is hesitant to announce revised plans. Rosatom, with the responsibility for developing the NSR, is, however, circulating revised scenarios for cargo volumes with lower but still very ambitious targets.[47]

Developing the NSR, especially building icebreakers, is very costly. In 2022, the price of a new 60-megawatt icebreaker was estimated at ₽41.75 billion (ca. $670 million) and the 120-megawatt 'Lider' at ₽99.14 billion ($1.61 billion). The government was prepared to cover a substantial share of investments, but not all. In addition, the tighter budget situation caused by the war in Ukraine was reflected in smaller cuts in the state budget of 2024–2026 for the construction of icebreakers. More importantly, inflationary pressures led to revised cost estimates. Increases between 60 and 100 per cent from the contracted price were expected. [48] The Baltic yard, responsible for construction of the 60-megawatt icebreakers, reported heavy losses in 2023.[49]

The icebreakers under construction, except for the super-icebreaker, are nevertheless likely to be completed, possibly with some delay. However, the economics of operating them with a smaller customer base could become an additional headache for the government.

Arctic environment and climate

Collective climate action and research on climate change in the Arctic is a casualty of Russia's war in Ukraine. Cooperation on climate was one of the pillars of the work of the

Arctic Council, and following Russia's invasion of Ukraine, Russian scientists have become isolated from the rest of the Arctic scientific community.[50] Furthermore, the reduced access to Russian climate data negatively affects climate research globally. The exclusion of Russian research stations exacerbates existing biases in the representation of ecosystem conditions in the Arctic, significantly impairing the accurate monitoring and projection of terrestrial Arctic changes. This bias has arisen because Russian stations cover critical high-latitude ecoregions, such as the extensive Siberian taiga, which are essential for adequately characterising variables, such as vegetation biomass, net primary productivity and heterotrophic respiration.[51]

In the period preceding the full-scale invasion, a significant development took place in Russia's climate change policies. In the post-Kyoto period, Russian political elites had supported policy inaction[52] amid a lack of scientific consensus in Russia on whether climate change was anthropogenic.[53] However, in the post-Paris Agreement period, Russia's serious climate scientists managed to convince policymakers of the significant role of anthropogenic origins in climate change and the critical need for adaptation measures.[54] The Russian Hydrometeorological Service's third climate change assessment report underlined the vulnerability of the Russian Arctic to climatic changes and highlighted the need for a policy response to address various risks.[55] The rise of climate change on the global agenda since the Paris Agreement and also the European Green Deal contributed to a slight increase in ambition in Russian climate policy, which mostly focused on adaptation[56], although an experiment for emissions trading was launched.[57]

In addition to the severing of Russian–Western scientific cooperation, the politically and economically entrenched Russia seems to accept higher environmental risks in some Russian economic operations, such as by allowing the operation of non-ice-class oil tankers on the NSR. The shipment of oil is subject to regulations under the International Maritime Organization's Polar Code. Russia's use of non-ice-class vessels for some of the transportation has caused concern in Western quarters.[58]

However, adaptation to climate change remains on the agenda. The 2023 changes to the *Basic Principles of State Policy in the Arctic* included a clause about the need to monitor 'the degradation of permafrost for the purposes of comprehensive social and economic development of the Arctic zone of the Russian Federation, as well as the development of its infrastructure'.[59] The Yamal–Nenets autonomous district also adopted a regional law[60], making permafrost protection and monitoring mandatory and establishing multiple monitoring stations.[61] Furthermore, Nornickel, recognising the 'inevitable changes', started implementing a comprehensive monitoring project for buildings and structures constructed on permafrost in the Norilsk industrial region to adapt to observed and

anticipated climate changes.[62] This demonstrates that the looming challenge of climate change is too significant to ignore.

'Pivot to Asia 2.0'

Russia's invasion of Ukraine created a new geopolitical environment for all countries, including Russia. This decision has cost Russia's foreign policy dearly, and it has particularly affected several core foreign policy objectives in the Russian Arctic. Russia's 2016 Foreign Security concept maintained that Russia was 'negative to NATO expansion' and 'the alliance's military infrastructure moving closer to Russia's borders'[63], but as a direct consequence of Russia's actions, previously non-aligned Finland and Sweden joined NATO[64], making Russia the only Arctic nation that is not part of the alliance. Furthermore, the invasion made 'strengthening good-neighbourly relations with the Arctic states on a bilateral basis and within the framework of multilateral regional cooperation formats' increasingly difficult.[65]

As a result, Russia has become isolated both economically and politically. The war started during Russia's chairship of the Arctic Council, and seven other member states paused their participation in the council's activities until, following some diplomatic rope-walking, the rotating chairship was transferred to Norway and some activities resumed.[66] There was some speculation about whether Russia would withdraw from the Arctic Council and establish alternative fora, but Russia decided to stay on, even if new arrangements for its participation are not yet clear. Russia has nothing to lose and perhaps something to gain from participation in multilateral fora. Russia did, however, formally withdraw from the Barents Euro-Arctic Region, marking the final nail in the coffin of cooperation promoted by Norway since its establishment in the early 1990s. In addition, in several instances, Russia sought to develop new forms of cooperation with 'extra-regional states and associations'.[67]

China has helped Russia save face in its increasing isolation. Diplomatically, Putin was front and centre with Xi Jinping during the Belt and Road Forum held in Beijing in October 2023, which became Putin's first major international event since the invasion.[68] Militarily, Russia and China have demonstrated increased military cooperation in the Arctic. This came at a time when Russia's land forces in the Arctic were significantly weakened[69] and NATO expanded to include Finland (and later Sweden). In September 2022, Chinese and Russian warships patrolled the North Pacific, which was monitored by the US Coast Guard. [70] In April 2023, Russian and Chinese Coast Guards signed a cooperation agreement in the city of Murmansk, which is the hub of Russia's Northern Fleet, and China was invited to observe the Arctic Patrol 2023 exercise.[71] China sought to use joint patrols in the Arctic to send a reciprocal response to the increased US presence in the South China Sea and to demonstrate the resolve of the two countries 'to prevent the West from using the Arctic to pose national defence threats to China and Russia, or from

causing damage to Arctic shipping routes and natural ecology'.[72] During the Russia–China Joint Patrol in 2023, Russian and Chinese navy vessels passed the Sea of Japan, La Pérouse Strait, the Sea of Okhotsk and Kamchatka Strait, sailing by Alaska and the Aleutian Islands, which triggered US security concerns.[73] In July 2024, Russia and China conducted a joint exercise in the Pacific, which was followed by a bomber patrol near Alaska.[74] This was followed by the even larger 'Ocean-2024'[75] and 'Northern Interaction-2024' exercises, both of which partly encompassed the Arctic.[76]

As Russia's new large trading partner, China is increasingly seen as the solution to problems stemming from the estrangement of Russia from Western markets. Russia's partnership with China was already set high on the agenda after the 'pivot to the East' following the annexation of Crimea in 2014, but Russia remained largely sceptical of Chinese intentions in the Arctic.[77] Russia's estrangement has caused a fundamental shift on some core issues of Russia's earlier Arctic foreign policy. For example, Russia underscored the NSR's status 'as a national transport communication [corridor] of Russia in the Arctic'[78] and thus as an issue under Russia's exclusive control. After February 2022, Russia declared its wish to intensify cooperation with China, such as by setting up a 'joint working body for the Northern Sea Route'[79], which was finally established as a working group under a commission for the preparation of regular meetings of heads of government.[80] Russia invited China 'to work together on the development and construction of the Northern Sea Route, the construction of an ice-class merchant fleet and the insurance of ships and cargo moving along the NSR'.[81] This represents a significant geopolitical change for Russia, which traditionally defines control of the NSR as its national prerogative. This change reflects Russia's increased reliance on China as its strategic partner, even in the Arctic region.

Russia's lack of options is evident in all areas of the economy. Nornickel is considering closing its copper smelter in Norilsk and instead building one in China.[82] The company's lithium branch, which was in the European supply chain, also needs to reorient itself to China.[83] Prior to the war, the now 'unfriendly' countries accounted for 33 per cent of Russian forestry exports.[84] The Russian forestry industry was hard hit by the EU sanctioning most Russian forestry products and Russia banning the export of unprocessed timber, including from the European Arctic regions.[85] Russia stood to lose up to 20 per cent of its forestry exports.[86] By 2024, a significant portion of the Russian forestry exports have been re-routed to various Asian markets, especially China[87], which led to competition between European and Siberian producers for transport capacity to Asia.[88]

However, it is not clear to what extent China (and, especially, Chinese companies) is interested in maximising the opportunities Russia now seems willing to offer. Even if China sees strategic benefits from broader involvement in the Russian Arctic, Chinese companies will evaluate the commercial potential of various investments. A case in point

is the negotiations over the Power of Siberia-2 pipeline, which had been periodically proposed in some form since 2006, but gained serious traction in 2020. In 2022, following the loss of European markets, Gazprom's spare productive capacity made the Power of Siberia-2 a national priority, discussed at bilateral high-level meetings. Putin went so far as to state that 'almost all parameters of this agreement have been agreed upon'[89] during Xi Jinping's visit to Moscow in 2023, despite Xi Jinping's silence on the matter. Allegedly, China's request for heavy discounts is the reason for the slow negotiations[90], even though Gazprom's earlier Power of Siberia-1 pipeline is already the cheapest of China's pipeline suppliers.[91] China holds a significant advantage in negotiations, and Gazprom has no choice but to sell, even when prices in China will be lower than in Europe.[92] Up until the start of the war, Chinese companies were generally cautious[93], but in the current situation, the risks associated with investments in Russia have increased.

A similar invitation for increased cooperation has been extended to India. During Prime Minister Narendra Modi's visit to Moscow in July 2024, Russia and India signed the Programme of India–Russia Cooperation for the trade, economic and investment spheres in the Russian Far East for the period from 2024 to 2029, as well as agreeing to cooperation principles for the Arctic zone of the Russian Federation.[94] It is unclear if the programme contains any specific projects other than a 'further increase in trade and joint investment projects'.[95] In addition, India's National Centre for Polar and Ocean Research signed a memorandum of understanding with the Arctic and Antarctic Research Institute for conducting joint research in polar regions.[96] This happened just as India surpassed China as the top importer of Russian oil.[97] India's policy towards Russia was largely understood in the West as a balancing act to counter Chinese influence in Russia, in addition to securing Indian economic interests[98], although India's failure to condemn Russia's breach of international law and norms was deplored.[99]

To summarise, Russia is re-orienting its foreign and economic policy towards Asia. This has several consequences. First, discounts on Russian export products and higher transport costs will affect the profitability of Russian companies, all of which are the result of economic sanctions. Second, China's dominant role in Russia's exports means that it can set the terms for cooperation projects in the Arctic.

Conclusion

The 2022 invasion of Ukraine has disrupted Russia's plans in the Arctic region, halting progress on critical projects and undermining its long-term strategic interests. Over the past few decades, Russia has partially managed to modernise its Arctic infrastructure and increase its resource extraction operations and traffic on the NSR. This has been achieved in the context of a Russia integrated into the international division of labour specialised in providing raw materials to European countries. The challenges of adapting to new economic and technological realities have left limited possibilities for Russia to

find a new place in the global economic system. Russian companies have demonstrated a high level of flexibility, ensuring undisrupted operations in the short term. However, the war made pre-existing institutional weaknesses acute. In the long term, these pressures make Russia's ambitious goals unrealistic. Despite the lack of official acknowledgement of changes to Russia's geopolitical environment due to its war in Ukraine, the Russian Arctic strategy has undergone significant adjustments. First, Russia's oil and coal exports have been partially re-routed to Asian markets. Second, Russia's ambitious Arctic projects, such as LNG projects, have slowed down due to significant challenges stemming from the pressure of sanctions. Third, Russia has become less sensitive about allowing China to take on a greater role in the Arctic.

Over the longer term, progress in Russia's development of the Arctic is dependent on cooperation, if not with Western countries, then with China and India. Whereas Russia–NATO tension in Europe is very high, paradoxically, Russia's military preparedness in the Arctic has been reduced, as a significant share of land forces on the Kola Peninsula was deployed in Ukraine. It also seems that Russian and Western naval operations in the European Arctic have been restrained to avoid incidents. On the strategic level, Russia is reassessing its position with Finland and Sweden in NATO and the possibility of a US military presence near its borders.

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