BRICS TRANSPORT
VOL. 4 ISSUE 3 2025

ECONOMICS OF INTERNATIONAL TRANSPORT AND LOGISTICS:
INTELLIGENT AND DIGITAL SOLUTIONS AND PRACTICES
ЭКОНОМИКА МЕЖДУНАРОДНЫХ ПЕРЕВОЗОК И ЛОГИСТИКИ:
ИНТЕЛЛЕКТУАЛЬНЫЕ И ЦИФРОВЫЕ РЕШЕНИЯ И ПРАКТИКА

Review article
UDC 338.24:656.6
doi: 10.46684/2025.3.05
EDN UCFGKN

Shipbuilding industry of Russia: State and problems of strategic development[1]

Nataliya E. Tereshkina[1]✉, Ol'ga A. Khalturina[2]

[1] Siberian Transport University (STU); Novosibirsk, Russian Federation

[2] Novosibirsk State University of Economics and Management (NSUEM); Novosibirsk, Russian Federation

[1] phd_76@mail.ru✉; https://orcid.org/0000-0002-1303-8871

[2] olga_andre@mail.ru; https://orcid.org/0000-0001-6264-3042

ABSTRACT Shipbuilding is a major labour-, capital- and technology-intensive industry for Russia providing products for water transport, offshore and onshore construction, state defence procurement programme, mining, fishing, etc. A current crucial task to identify factors preventing the long-term development of shipbuilding in Russia and analyse government support measures aimed at mitigating them. The paper examines the state of the shipbuilding industry in Russia and related strategic public management issues.

The materials used include regulatory legal acts of the Russian Federation, official statistics, and works by Russian scholars. The study uses scientific methods such as formalization, visualization, comparison, synthesis, induction, and generalization.

The paper considers both global and domestic trends in shipbuilding and its main participants. It identifies and validates both endogenous (ineffective management; obsolescence and physical depreciation of equipment and fleet; instability of the industry as a socio-economic system; inadequacy of the number and capacities of existing enterprises to the growing demand; use of outdated shipbuilding technologies; increase in the key interest rate, and inflation processes) and exogenous (sanctions policies of unfriendly countries; deglobalization processes, the increasing numbers of international intermediaries, changes in international logistics and supply chains) factors that hamper the development of shipbuilding in the country. The authors analyse the state strategic instruments for the regulation of the industry in the long and medium term, including their drawbacks, and assess the level of financing of the subject sector from the national budget.

The analysis has led the authors to the conclusion that endogenous factors prevail over exogenous ones, hindering further strategic development of the subject industry. In practical terms, the study puts forward a number of activities intended to mitigate the negative internal factors identified. These specifically include amending the Law "On Strategic Planning in the Russian Federation"; using more rigorous measures to monitor and control spending of special-purpose funds and ensure efficient achievement of strategic goals and objectives; and increasing regulation for providing full responsibility of top executives of state corporations for failures and non-achievement of long-term goals and objectives defined earlier.

KEYWORDS: shipbuilding; strategic public management; development; endogenous and exogenous factors

For citation: Tereshkina N.E., Khalturina O.A. Shipbuilding industry of Russia: State and problems of strategic development. *BRICS transport*. 2025;4(3):05. https://doi.org/10.46684/2025.3.05. EDN UCFGKN.

Обзорная статья

Судостроительная отрасль России: состояние и проблемы стратегического развития[1]

[1] Published in Russian: Tereshkina N.E., Khalturina O.A. Shipbuilding industry of Russia: state and problems of strategic development. *Transport in the Russian Federation. Journal of Science, Practice, Economics*. 2025;2(117):10-15. EDN TUUNIP.
На русском языке опубликовано: *Терешкина Н.Е., Халтурина О.А.* Судостроение России: состояние и проблемы стратегического развития // Транспорт Российской Федерации. Журнал о науке, практике, экономике. 2025. № 2(117). С. 10–15. EDN TUUNIP.

Н.Е. Терешкина[1]✉, О.А. Халтурина[2]

[1] Сибирский государственный университет путей сообщения (СГУПС); Новосибирск, Россия
[2] Новосибирский государственный университет экономики и управления (НГУЭУ); Новосибирск, Россия
[1] phd_76@mail.ru✉; https://orcid.org/0000-0002-1303-8871
[2] olga_andre@mail.ru; https://orcid.org/0000-0001-6264-3042

АННОТАЦИЯ Судостроительная промышленность — важнейшая для России трудоемкая, капиталоемкая и высокотехнологичная отрасль, которая производит продукцию для водного транспорта, морского и прибрежного строительства, гособоронзаказа, добычи полезных ископаемых, рыболовства и др. При этом сегодня актуальной задачей является выявление факторов, препятствующих долгосрочному развитию отечественного судостроения и анализ мер государственной поддержки, направленных на снижение их воздействия. Статья посвящена исследованию состояния судостроительной отрасли в России и стратегическому государственному управлению ею.

Материалами послужили нормативно-правовые акты РФ, официальные статистические данные, а также работы отечественных авторов. При проведении исследования использовались такие научные методы, как формализация, визуализация, сравнение, синтез, индукция и обобщение.

В работе рассмотрены мировые и отечественные тенденции судостроения и основные его участники; выявлены и обоснованы эндогенные (неэффективный менеджмент; моральное старение и физический износ оборудования и флота; неустойчивость функционирования отрасли как социально-экономической системы; недостаточное количество имеющихся предприятий и их мощностей для удовлетворения растущего спроса; применение устаревших технологий строительства судов; увеличение ключевой ставки и инфляционные процессы) и экзогенные (санкционная политика недружественных стран; процессы деглобализации, рост числа международных посредников, изменение международной логистики и цепочек поставок) факторы, препятствующие развитию судостроения в стране; проанализированы государственные стратегические документы, направленные на регулирование отрасли в долго- и среднесрочном периодах, и их недостатки; проведена оценка уровня финансирования за счет государственного бюджета исследуемой сферы.

В результате проведенного анализа авторы пришли к выводу, что эндогенные факторы доминируют над экзогенными и препятствуют дальнейшему стратегическому развитию исследуемой отрасли. С практической точки зрение предложен ряд мероприятий, направленных на снижение негативного влияния выявленных внутренних факторов, а именно: внесение изменений в закон «О стратегическом планировании в РФ»; ужесточение процедур мониторинга и контроля целевого расходования средств и четкого достижения поставленных стратегических целей и задач; усиление регулирования вопроса полной ответственности высшего менеджмента государственных корпораций за провалы и недостигнутые поставленные ранее долгосрочные цели и задачи.

КЛЮЧЕВЫЕ СЛОВА: судостроение; стратегическое государственное управление; развитие; эндогенные и экзогенные факторы

Для цитирования: *Терешкина Н.Е., Халтурина О.А.* Судостроительная отрасль России: состояние и проблемы стратегического развития // Транспорт БРИКС. 2025. Т. 4. Вып. 3. Ст. 05. https://doi.org/10.46684/2025.3.05. EDN UCFGKN.

INTRODUCTION

Shipbuilding is a modern integrated industry which manufactures and sells shipbuilding products and supplies mechanical equipment for water transport, offshore construction projects, state defence procurement programme, and other sectors. It plays an important role and is essential for employment promotion, increasing export trade, provision of coastal areas, and defence security. It is also a labour- and capital-intensive industry crucial for the development of mining and manufacturing industries, such as resource survey and mining, electromechanical, steel, chemical, ship repair and fishing industries, software, telecommunications, and navigation.

Besides being the world's largest territory, Russia has 38.8 thousand km of maritime borders, 44 thousand km of the overall coastal line of its borders, and 101.5 thousand km of inland waterways, 78% of them mainly used as a channel for delivery of goods and passengers, with 53.4 thousand km used for provision of residents of the Far North.

The materials used for this study include regulatory legal acts of the Russian Federation, official statistics, and works by Russian scholars. The study uses scientific methods such as formalization, visualization, comparison, synthesis, induction, and generalization.

FINDINGS

The last decade has seen a decline in the world's shipbuilding industry compared, for example, with 2010–2012, and consequently, increasing operational

Table 1

Total number and growth rates of output of ships and vessels with a displacement of over 50 thousand tonnes built in Russia [2]

Indicator	Period										
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Quantity, ships	141	134	89	100	122	101	108	94	82	112	125
Growth rates, %	100.0	95.04	64.18	116.28	122.0	82.79	106.93	87.04	87.23	136.59	111.61

lives of existing ships while toughening environmental requirements to them[2].

World prices in the shipbuilding sector have been consistently growing. In 2023, the annual price index for new ships reached 178, showing a 10.2% increase at the end of the year. At the same time, the annual price index for used ships was 149 points, indicating a slight (2%) increase over the year.

The number of orders for new ships increased from 100.5 million DWT in 2022 to 116.5 million DWT in 2023. The number of ships built in 2023 also increased to 81.1 million DWT (1,301 ships) as compared to 79.1 million DWT (1,294 ships) in 2022. The global building programme increased from 243 million DWT at the end of 2022 to 277.3 million DWT at the end of 2023, which accounts for 12.5% of the active fleet.

2023 also saw a great number of transactions in the used ship market: 3,805 ships (205 million DWT). This is slightly fewer than in 2022, when 4,301 ships (216 million DWT) were sold[3].

The major players in the global competition in the shipbuilding industry are China, Japan and South Korea, while Europe and developing shipbuilding economies (such as Vietnam and the Philippines) have smaller market shares. China demonstrates absolute control over the market of bulk carriers, oil tankers and car carriers, while South Korea plays the most prominent role in the LNG carrier segment.

Overall, China has been the leader in global shipbuilding for 14 years in a row. In 2023, China's completed shipbuilding output was 42.32 million DWT (an 11.8% growth compared to the same period of the previous year) and the number of new orders received was 71.2 million DWT (plus 56.4%).

As of the late December 2023, the number of orders on hand was 139.39 million DWT, which is 32% more than a year earlier. In particular, in 2023, China completed the construction of 34.53 million DWT of ships for export (plus 12.6%). Orders for export ships received amounted to 66.51 million DWT (plus 64.1%), and export orders for ships were 130.15 million DWT (plus 36.7%). Export vessels accounted for 81.6%, 93.4%, and 93.4% of the country's completed shipbuilding orders, new orders, and orders on hand, respectively[4].

Territorially, the Northwestern Federal District accounts for the largest number of shipbuilding enterprises and output in Russia: 45% and 61.1% of Russia's total number and output, respectively.

The following state associations control 90% of the entire industry:

- Civil shipbuilding: United Shipbuilding Corporation JSC (hereinafter "OSC JSC"), Ak Bars Shipbuilding Corporation JSC, Modern Shipbuilding Technologies JSC, Centre for Shipbuilding and Ship Repair Technology JSC, and Marine Instrument Engineering Corporation JSC;
- Military shipbuilding: Rostec State Corporation (Remvooruzhenie JSC), Almaz-Antey Concern JSC, Tactical Missile Weapons Corporation JSC.

According to the Ministry of Industry and Trade, in 2024, the industry comprised 440 organisations, including 332 industrial enterprises, 88 design bureaus and research and development organisations, and 20 other service-related companies [1].

Table 1 shows changes in the amount and growth rates of output in civil and military shipbuilding over the last 11 years.

Despite the increasing total number of ships and vessels with a displacement of over 50 thousand tonnes commissioned in 2024 by 43 ships or 1.5 times to reach 125 against 82 in 2022, the majority of ships built were small-capacity ones. At the same time, in the recent years in Russia, commissioning of large-capacity (over 100 thousand tonnes) vessels demonstrated a particularly dramatic decline [3].

It is very difficult to identity sustainable long-term targets for building ships in Russia. For example, in

[2] 2024 Review of maritime transport. Chapter II. World shipping fleet and services / unctad. URL: https://unctad.org/system/files/official-document/rmt2024ch2_en.pdf

[3] Shipping and Shipbuilding Markets, 2024 / BRS Group. URL: https://it4resources.interactiv-doc.fr/catalogues/annual_review_2024_668/galeries/1711537990annual_rev.pdf

[4] 2023 年船舶工业经济运行报告 // URL: http://lwzb.stats.gov.cn/pub/lwzb/bztt/202405/W020240527578179701223.pdf

2023, the Ministry of Industry and Trade adjusted the shipbuilding plan to 985 ships (which will include 93 medium-capacity and 60 large-capacity ones) by 2035 against the previous target of 1,101 ships, clarifying that the number of ships to be built under government-sponsored programs will not change.

Following a meeting between the President of Russia and the Government on March 14, 2024, instructions were issued to re-update the Long-term Shipbuilding Plan until 2035 and the Strategy for the Development of the Shipbuilding Industry for the Period until 2035 approved on October 28, 2019. As of the early 2025, no changes to the above mentioned Plan and Strategy were made.

The Chairman of the Government reported that the Long-term Shipbuilding Plan until 2037 includes building 1,700 civilian ships. Besides, in the early 2025, the Integrated Plan for the Achievement of National Development Goals of the Russian Federation until 2030 and in the Longer Run until 2036 was posted on the Government's website. According to the Plan, 105 ships are to be built in 2025 and the number will gradually increase to 638 ships by 2030[5].

It should be noted that strategically, frequent adjustments are undesirable, as they make the operation of all industry stakeholders less stable.

The key challenges faced by the industry include a number of endogenous and exogenous factors hampering the development of shipbuilding in Russia. The authors believe that endogenous factors prevail over exogenous ones.

Accordingly, the consequences of internal mistakes and blunders made in the industry after the collapse of the USSR should be corrected in an elaborate and careful manner. Exogenous factors can potentially give a boost for increasing the country's own diverse and unique production, forming key competencies in staff and increasing competitiveness of products in the future.

The following can be referred to negative endogenous factors in the shipbuilding industry:

- Ineffective management. The most outstanding example here is loss-making performance of OSK JSC, resulting in the appointment of a new CEO and new board of directors in August 2023 and placing 100% of its shares under management with VTB PJSC for five years. The latter is also a somewhat questionable solution, as the bank's representatives are geared to fast growth of business profitability, which is impossible in the current situation, not to mention that they lack expertise in shipbuilding. There are a lot of cases in the economy when top managers failed to take account of all the specific aspects of unrelated diversification, leading to losses and abandonment of the business acquired.
- Obsolescence and physical depreciation of both equipment at enterprises and the fleet itself, and the need to modernize them promptly and thoroughly [4]. The industry features a high degree of deterioration of workshop premises, launch and recovery systems, and slipways at shipyards, as well as bottlenecks in production processes [5]. For example, an audit of OSK JSChas found that the company still uses the equipment produced in Germany in 1932. An illustration of the technical condition of Russian companies' fleet and its operation beyond all reason is a recent tragic incident (and not the first case) with casualties and significant regional environmental damage in the Kerch Strait, where the Volgoneft 212 fuel oil tanker (launched at the Volgograd Shipyard 56 years ago on December 15, 1969) was damaged and ran aground and the Volgoneft 239 tanker (in operation for more than 50 years) was damaged and went adrift during a storm on December 15, 2024. In general, the average period of operation of a ship in the Russian fleet is about 40 years.
- Unstable operation of the industry as a system as a whole. The Ministry of Industry and Trade clearly states that Russia's shipbuilding industry has been in transformation for the last decade [1], which is quite a long period of time which could have included the completion of a few investment cycles for innovative development. Moreover, researchers note that the industry had reached a critical state by the end of 2023 [6].
- The number of enterprises and capacities is inadequate for meeting the growing demand from transport companies. Expert estimates show that shipbuilders meet only 6% of the domestic demand for products [6]. The shortage of large-capacity ships is particularly high, as there are no production facilities for building such vessels and they cannot be added quickly. Russian ship owners acquire ships abroad. For example, eight new sea vessels were bought in 2022 and ten ships were acquired in 2023[6] [7]. According to experts, every month the Russian shadow tanker fleet is replenished with 10 vessels, most often used ones. By the end of 2024, this accounted for 9% of the global market [8]. The major-

[5] The Unified Plan for the Achievement of the National Development Goals of the Russian Federation for the Period until 2030 and in the Longer Run until 2036. URL: http://static.government.ru/media/files/ZsnFICpxWknEXeTfQdmcFHNei2FhcR0A.pdf
[6] Analysis of deliveries of vessels for sea transport fleet in 2023 / Central Marine Research and Design Institute (TsNIIMF). 21.03.2024. URL: https://cniimf.ru/press-tsentr/news/1790/

ity of studies note that the industry is expected to be highly overloaded in 2025–2030[7] and will be unable to fully meet the domestic demand [9].

- Use of outdated shipbuilding technologies with a significant production cycle and high cost of resources used [10]. The authors [9] emphasize that the Russian shipbuilding industry has almost no large-scale production where each order at a shipyard represents a unique, one-off product that has not been manufactured before and is unlikely to be ordered again. This makes the ship construction period longer, results in flaws during the ship creation process, etc. The level of automation is 7–9% (while in South Korea it is about 70%). It would be relevant to accelerate digitalization, i.e. to switch to Shipbuilding 4.0 using domestic software, which is almost non-existent given the specifics of the industry.
- Lack of highly skilled personnel. In 2023, the median wage in the industry was RUB 85,000 [11]. Apparently, industry offers quite difficult working conditions, especially for blue-collar jobs, and because of this non-competitive level of pay many specialists fulfil their potential in other, more comfortable occupations. Also worth noting is the existing uneven distribution of vacancies, the majority of which are found in certain regions (such as St. Petersburg, the Udmurt Republic, Primorsky Krai, Moscow, and Chelyabinsk Region).
- Growth of the key interest rate and inflation processes. In 2022–2024, the key interest rate of the Bank of Russia grew from 8% to 21%, i.e. 2.6 times, leading to an increase in the average weighted interest rates offered by credit institutions and an increase in loan debt. Hence, this directly affects the efficiency of lending which businesses need due to a significant duration of the building process. Official statistics show that the inflation rate was 11.92% in 2022, 7.42% in 2023, and 9.52% in 2024. Therefore, the financial resources budgeted both in the state budget and by shipbuilding companies turn out to be insufficient due to monetary depreciation, and when it comes to purchasing necessary equipment abroad, the cost of the currency for the purchase is steadily increasing. Inflation also affects the growth of the final cost of a ship.

Some of the key exogenous factors hampering the development of the industry include the following:

- Sanctions policy of unfriendly countries. In 2022, many European shipyards had to stop working with Russian shipbuilding and related companies. This mainly led to a decrease in supply of necessary equipment and parts. At the same time, this affected civil shipbuilding, but almost had no effects on military shipbuilding. In 2024 alone, the sanctions list was extended to include the following prohibitive measures: May 1: the U.S. Treasury's SDN List included shipbuilding projects of NOVATEK PJSC; June 12: the U.S. sanctions restricting access to software and specifically affecting more than 10 legal entities; June 25 and December 16: the 14th and 15th packages of EU sanctions aimed at a number of defence enterprises, shipping companies and supplies of products required for production.
- Deglobalization processes, the increasing numbers of international intermediaries, changes in international logistics and supply chains, which result in the increase in financial and time resources, leading to ships standing idle in docks waiting for necessary equipment and so on.

It is evident that in the current difficult conditions, the government should devote much attention to shipbuilding and provide appropriate financial support to the industry given its paramount strategic importance. This can take the form of the following operational measures:

- Subsidizing the construction of large-capacity ships;
- Financing some costs of disposing of and replacing old ships;
- Using financial leasing mechanisms for fleet renewal;
- Developing new marine equipment and modernization of enterprises.

Let us take a closer look at strategic documents aimed at developing and supporting the shipbuilding industry at the national level. According to Federal Law No. 172-FZ dated June 28, 2014 "On Strategic Planning in the Russian Federation", Article 11, these documents include the Annual Presidential Address to the Federal Assembly, industry-specific strategic planning documents in terms of goals setting, and national projects (hereinafter "NPs") and government-sponsored programmes (hereinafter "GPs") in terms of planning and programming[8].

The main areas of state policies for solving systemic socially significant problems are often set out in the

[7] Report on research "Studying the possibilities and limitations of the development of the shipbuilding (cargo and fishing vessels), ship repair and related industries in the context of sanctions pressure" / FANU VOSTOKGOSPLAN. Moscow, 2024. 413 p. URL: https://vostokgosplan.ru/wp-content/uploads/issledovanie-vozmozhnostej-i-ogranichenij-razvitija-sudostroitelnoj-i-sudoremontnoj-otraslej-v-uslovijah-sankcij-nir.pdf

[8] Federal Law No. 172-FZ dated June 28, 2014 "On Strategic Planning in the Russian Federation" / Official website of legal information. URL: www.pravo.gov.ru.

Concepts. For example, the draft of a new Concept for the Development of the Shipbuilding Industry in Russia, which is being worked on by the Krylov State Scientific Centre, is due in November 2026. Besides, this research centre has won a tender for the development of regulatory documents for standardization of shipbuilding, which currently count more than 3,000 documents. A separate law to regulate the industry is planned to be formulated by the end of 2025.

Meanwhile, it should be emphasized that the Concept is not mentioned in the Law "On Strategic Planning in the Russian Federation" as a strategic planning document. From the legal viewpoint, this does not allow for using it as the main regulatory act for strategic public management practices. Therefore, given that there are a number of various Concepts in force, there is a need for amending the Law. For example, the term "Concept" was established in the Federal Law No. 115-FZ dated July 20, 1995 "On State Forecasting and Programmes for Socio-Economic Development of the Russian Federation", which has been in force since 1995.

In his Presidential Address to the Federal Assembly on February 29, 2024, Vladimir Putin, among other things, touched upon aspects of the development of transport in general and shipbuilding in particular. Thus, an emphasis was placed on reducing imports and switching to domestic production of vehicles. The completion of NOVATEK PJSC's investment project to create the Murmansk Centre for Construction of Large-Capacity Marine Structures in the village of Belokamenka was highlighted as a large-scale achievement. The President emphasized the need for modernizing the backbone network of inland waterways and paid special attention to the development of the Northern Sea Route.

The document "On the Transport Strategy of the Russian Federation until 2030 with a Forecast until 2035" sets out strategic goals for the development of the entire transport sector of Russia and those related to spatial connectivity and accessibility, increasing mobility of population, volumes and speeds of cargo transit, digital and low-carbon transformation[9]. Based on the results of the 2023 Report on the Implementation of the Transport Strategy, it should be noted that the performance indicators of the sea transport and seaports for the most part tend to increase compared to 2022, which is not the case with those on the performance of inland water transport and river ports[10].

The Strategy for the Development of the Shipbuilding Industry for the Period until 2035 contains the main strategic goal for the formation of relevant shipbuilding products, along with the relevant tasks and priorities[11]. But in terms of strategic management, any strategy requires timely adjustment due to changes in external and internal factors which, as noted above, changed significantly in 2022–2024 alone.

The Strategy for the Development of the Shipbuilding Industry for the Period until 2035 was adopted in 2019 and its only amendment was dated October 21, 2024, and it is not related to the current realities in the industry. The authors' research [12] based on the forecasting results has shown that effects of the current trends will not allow the industry to achieve the targets for the shipbuilding industry planned in the Strategy. The relevance of adjustment of this document is also emphasized in a research report[12] and in the Presidential Instruction to the Government dated March 14, 2024.

Besides, certain aspects of shipbuilding development are found in a fairly large number of other strategic government documents. For example, the Strategy for the Development of the Arctic Zone of the Russian Federation and Ensuring National Security until 2035 deals with issues related to the development of the Arctic and the Northern Sea Route.

The government-sponsored programme "The Development of Shipbuilding and Equipment for the Development of Offshore Deposits" (GP-18) approved on April 15, 2014 divided the implementation period into two stages: Stage I in 2013–2021 and Stage II in 2022–2030. The document contains goals and indicators that are almost completely the same as those stated in the Strategy for the Development of the Shipbuilding Industry until 2035. However, GP-18 does not take into account the objective referred to in the Transport Strategy for the construction and commissioning of more than 1,000 passenger and cargo ves-

[9] "On the Transport Strategy of the Russian Federation until 2030 with a Forecast until 2035", approved by Order of the Government of the Russian Federation No. 3363-r dated November 27, 2021. URL: https://docs.cntd.ru/document/727294161
[10] Report on the Implementation of the Transport Strategy of the Russian Federation until 2030 with a Forecast until 2035. Reporting period: 2023 / Ministry of Transport of the Russian Federation. URL: https://mintrans.gov.ru/documents/11/13540?type=11
[11] Strategy for the Development of the Shipbuilding Industry for the Period until 2035, approved by Order of the Government of the Russian Federation No. 2553-r dated October 28, 2019. URL: https://docs.cntd.ru/document/563615576
[12] Report on research "Studying the possibilities and limitations of the development of the shipbuilding (cargo and fishing vessels), ship repair and related industries in the context of sanctions pressure" / FANU VOSTOKGOSPLAN. Moscow, 2024. 413 p. URL: https://vostokgosplan.ru/wp-content/uploads/issledovanie-vozmozhnostej-i-ogranichenij-razvitija-sudostroitelnoj-i-sudoremontnoj-otraslej-v-uslovijah-sankcij-nir.pdf

Table 2

Financial provision of GP "The Development of Shipbuilding and Equipment for the Development of Offshore Deposits", RUB million[13, 14]

Indicator	Period				
	2023	2024	2025 (plan)	2026 (plan)	2027 (plan)
FP "Production of Ships and Marine Equipment"	–	–	***28,156.3***	***57,606.7***	***98,329.7***
FP "Stimulating Demand for Domestic Shipbuilding Products"	29,649.5	***31,791.0***	***135.5***	***135.9***	***135.9***
FP "Development of Large-Capacity Shipbuilding"	18,187.0	6,557.9	0	0	0
DP "A New Look of the Shipbuilding Industry"	207.0	207.0	0	0	0
Total	48,043.5	38,555.9	**28,291.8**	**57,742.6**	**98,465.6**

sels to replace retired worn-out and obsolete ships in 2019–2035. Besides, the Programme was not adjusted to be in line with the Presidential Address. In general, the monitoring of GP-18 in 2022–2023 showed the achievement of its targets[15]. Budget allocations to structural elements of the Programme in the form of national, federal (FP) and departmental projects (DP) are shown in *Table 2*.

As can be seen in *Table 2*, from 2026 onwards, it is planned to significantly increase funding for GP-18: by more than 2 times, and in 2027 it will be increased by 3.5 times compared to 2025. But, for example, in 2023, a much larger amount of budget funds was spent on the Programme than planned for 2025. It should also be noted that initially, the amount allocated for 2023 was almost 2 times less, but it was increased during the year.

GP "Environmental Protection" contains FP "The Development of Research and Distant-Water Fleet", allocations to which are planned at RUB 6,341.7 million in 2025, RUB 3,916.6 million in 2026, and RUB 9,941.7 million in 2027[16].

The data on allocations from the budget for the development of military shipbuilding is classified information and therefore cannot be included in this study.

The state budget for 2025–2027 provides for funding of R&D activities, including their systemic, analytical and expert support, operations to modernize production facilities, and subsidies for shipbuilding companies and related enterprises.

CONCLUSION AND DISCUSSION

As follows from the data presented above, the total planned amount of state funding for civil shipbuilding in Russia within the framework of the above-mentioned GPs and NPs in 2025–2027 will be at least RUB 204.7 trillion. A fairly large portion of the budget will also be allocated to military shipbuilding within the framework of the defence procurement programme, which will have a positive effect on both the industry and its related areas.

Based on strategic positions, in general, we can state that the government pays quite significant attention to the industry both in terms of financial support and its long-term planning and further development. However, the authors believe that a number of additional actions need to be taken to improve the public management processes to manage the development of shipbuilding.

1. The first aspect involves finalizing the Law "On Strategic Planning in the Russian Federation". From the perspective of strategic management, planning is only one of its stages. Accordingly, a sound strategic public management process should not only include planning as an element, but also operational management itself including control and assessment of the implementation of strategies as its component parts. The Law contains generalized procedures for monitoring and control of strategies, i.e. the document is much broader than its title. But these procedures lack detail and their

[13] Opinion of the Accounts Chamber of the Russian Federation on the 2023 Federal Budget Performance Report. URL: https://ach.gov.ru/upload/iblock/408/1ya157v6llliuulgrbvgzpnnb4n1newb.pdf
[14] Federal Law No. 419-FZ dated November 30, 2024 "On the Federal Budget for 2025 and for the Target Period of 2026 and 2027". URL: http://actual.pravo.gov.ru
[15] Opinion of the Accounts Chamber of the Russian Federation on the 2023 Federal Budget Performance Report. URL: https://ach.gov.ru/upload/iblock/408/1ya157v6llliuulgrbvgzpnnb4n1newb.pdf
[16] Federal Law No. 419-FZ dated November 30, 2024 "On the Federal Budget for 2025 and for the Target Period of 2026 and 2027". URL: http://actual.pravo.gov.ru

implementation mechanisms are not specified, which leads to ambiguity in understanding them in practical terms. It is necessary to have a legislated procedure in place for timely adjustment of adopted Strategies following both external and internal changes. In addition, as stated above, the Law should include the term "Concept".

2. It is necessary to tighten procedures to monitor and control spending of special-purpose funds and ensure efficient achievement of the strategic goals and objectives set. In the late 2024, the President of Russia instructed the Accounts Chamber to audit the completed NPs operated in the period from 2019 to 2024 by June 01, 2025[17]. It is the first time that such a large-scale audit has been undertaken (previously, monitoring procedures of this kind were only carried out as part of criminal cases) and it will identify systemic problems and flaws in the implementation of government-sponsored projects, which will result in the adjustment of a number of legislative and regulatory acts, beginning with the Law "On Strategic Planning in the Russian Federation". In order to improve these procedures during the implementation of the existing strategic documents, it is also necessary to consistently reduce their overall numbers. As of the end of 2024, the "Management" State Automated Information System (GAIS) has a document register with about 59,000 regulatory and legal acts on strategic planning of all levels. Obviously, many of these documents are not interrelated and it is extremely difficult to effectively and timely monitor the achievement of strategic goals and objectives set out in such a number of documents.

3. In strategic management of the corporate sector, full responsibility of top management members for failures and non-achievement of long-term goals and objectives set earlier is clearly regulated. In strategic public management, this aspect also requires more transparency, detail and consistency in toughening punishment both for civil servants and heads of state corporations and companies with state participation.

We would also like to note that the historical experience of the post-war USSR in shipbuilding shows that Russia is able to stay focused, overcome all negative endogenous factors, and restore its technological leadership in this industry, which is a strategic necessity in the present context.

REFERENCES

1. Russian shipbuilding today and tomorrow / Department of shipbuilding industry and marine engineering of the Ministry of Industry and Trade of Russia. June 26, 2024. *Marine Collegium*. URL: https://marine.org.ru/upload/iblock/5f1/irnfb5z92d6o46gq6tk0qopdxtdubsgh.pdf. (In Russ.).

2. Russian shipyards increased the number of delivered vessels by 36%, INFOLine notes. 28.02.2024. URL: https://infoline.spb.ru/news/index.php?news=284501&ysclid=lv4n42ltmf942657874. (In Russ.).

3. Sidorov A. Shipbuilding of Russia: the fleet is counted in the fall. *Maritime News of Russia*. 21.11.2024. URL: https://morvesti.ru/analitika/1692/112715/. (In Russ.).

4. Kvasnikova E.A. Macroeconomic determinants of the civil shipbuilding development: global trends and prospects of Russian manufacturers. *Russian Journal of Innovation Economics*, 2022;12(3):1817-1832. URL: https://doi.org/10.18334/vinec.12.3.115077. EDN VPPLVH. (In Russ.).

5. Konovalov S. There are many problems in shipbuilding. We will solve them together / *Mediadeck*. 26.02.2024. URL: https://paluba.media/news/71450. (In Russ.).

6. Sergeev K. Shipbuilding in Russia: from program to plan. *Shipbuilder*. 30.05.2024. URL: https://www.korabel.ru/news/comments/sudostroenie_rossii_ot_programmy_-_k_planu.html. (In Russ.).

7. *Specialists of JSC Central Research and Design Institute of the Marine Fleet conducted an analysis of deliveries of sea transport vessels for domestic ship owners in 2022* / Central Research and Design Institute of the Marine Fleet. 17.03.2023. URL: https://cniimf.ru/press-tsentr/news/1632/#anc1. (In Russ.).

8. Shchukin P. The growth of the Russian shadow fleet of tankers has been calculated. *Lenta*. 17.12.2024. URL: https://lenta.ru/news/2024/12/17/prirost/. (In Russ.).

9. Savchenko O.V., Polovinkin V.N. The current state, problems and prospects of domestic commercial shipbuilding. *Transactions of the Krylov State Research Centre*. 2022;3(401):152-164. DOI: 10.24937/2542-2324-2022-3-401-152-164. EDN KQCNFY. (In Russ.).

10. Kozhina E.V., Schislyaeva E.R. Key problems on the way of digital transformation of Russian shipbuilding. *Beneficium*. 2023;1(46):DOI: 10.34680/BENEFICIUM.2023.1(46).28-35. (In Russ.).

11. "The labor shortage will remain a fundamental problem of the labor market in 2024" — the results of 2023 in the country's shipbuilding industry. *Media deck*. 02.02.2024. URL: https://paluba.media/news/69112. (In Russ.).

12. Tresoruk A.A., Frolov I.E. Long-term development of Russian shipbuilding taking into account the processes of diversification of defense industries: model and forecast. *Problems of forecasting*. 2020;6(183):119-128. DOI: 10.47711/0868-6351-183-119-128. (In Russ.).

[17] The Accounts Chamber announces 113 activities to audit completed national projects // Vedomosti 11.02.2025. URL: https://www.vedomosti.ru/society/articles/2025/02/11/1091324-schetnaya-palata-anonsirovala-113-meropriyatii

ЛИТЕРАТУРА

1. Российское судостроение сегодня и завтра / Департамент судостроительной промышленности и морской техники Минпромторга России. 26 июня 2024 г. // Морская коллегия. URL: https://marine.org.ru/upload/iblock/5f1/irnfb5z92d6o46gq6tk0qopdxtdubsgh.pdf.

2. Российские верфи увеличили число сданных судов на 36%, отмечают в INFOLine // INFOLine. URL: https://infoline.spb.ru/news/index.php?news=284501&ysclid=lv4n42ltmf942657874.

3. *Сидоров А.* Судостроение России: флот по осени считают // Морские вести России. 21.11.2024. URL: https://morvesti.ru/analitika/1692/112715/.

4. *Квасникова Е.А.* Макроэкономические детерминанты развития гражданского судостроения: мировые тренды и перспективы российских производителей // Вопросы инновационной экономики. 2022. Т. 12. № 3. С. 1817–1832. DOI: 10.18334/vinec.12.3.115077. EDN VPPLVH.

5. *Коновалов С.* Проблем в судостроении много. Решать их будем вместе // Медиапалуба. 26.02.2024. URL: https://paluba.media/news/71450.

6. *Сергеев К.* Судостроение России: от программы — к Плану // Корабел. 30.05.2024. URL: https://www.korabel.ru/news/comments/sudostroenie_rossii_ot_programmy_-_k_planu.html.

7. Специалисты АО «ЦНИИМФ» провели анализ поставок судов морского транспортного флота для отечественных судовладельцев за 2022 год // ЦНИИМФ. 17.03.2023. URL: https://cniimf.ru/press-tsentr/news/1632/#anc1.

8. *Щукин П.* Подсчитан прирост российского теневого флота танкеров // Лента. 17.12.2024. URL: https://lenta.ru/news/2024/12/17/prirost/.

9. *Савченко О.В., Половинкин В.Н.* Современное состояние, проблемы и перспективы развития отечественного гражданского судостроения // Труды Крыловского государственного научного центра. 2022. № 3 (401). С. 152–164. DOI: 10.24937/2542-2324-2022-3-401-152-164. EDN KQCNFY.

10. *Кожина Е.В., Счисляева Е.Р.* Ключевые проблемы на пути цифровой трансформации российского судостроения // Beneficium. 2023. № 1 (46). С. 28–35. DOI: 10.34680/BENEFICIUM.2023.1(46).28-35.

11. «Дефицит кадров останется фундаментальной проблемой рынка труда в 2024» — итоги 2023 года в судостроительной отрасли страны // Медипалуба. 02.02.2024. URL: https://paluba.media/news/69112.

12. *Тресорук А.А., Фролов И.Э.* Долгосрочное развитие российского судостроения с учетом процессов диверсификации оборонных отраслей: модель и прогноз // Проблемы прогнозирования. 2020. № 6 (183). С. 119–128. DOI: 10.47711/0868-6351-183-119-128.

Bionotes

Nataliya E. Tereshkina — Cand. Sci. (Econom.), Associate Professor, Associate Professor of the Department of Transport Management; **Siberian Transport University (STU)**; 191 Dusi Koval'chuk st., Novosibirsk, 630049, Russian Federation; SPIN-code: 6214-4430, RSCI ID: 879602, ResearcherID: ABT-9293-2022, ORCID: 0000-0002-1303-8871; phd_76@mail.ru;

Ol'ga A. Khalturina — Cand. Sci. (Econom.), Associate Professor, Associate Professor of the Department of Information and Analytical Support and Accounting; **Novosibirsk State University of Economics and Management (NSUEM)**; 56 Kamenskaya st., Novosibirsk, 630099, Russian Federation; RSCI ID: 709077, SPIN-code: 8402-0899, ORCID: 0000-0001-6264-3042; olga_andre@mail.ru.

Об авторах

Наталия Евгеньевна Терешкина — кандидат экономических наук, доцент, доцент кафедры «Менеджмент на транспорте»; **Сибирский государственный университет путей сообщения (СГУПС)**; 630049, Россия, г. Новосибирск, ул. Дуси Ковальчук, д. 191; SPIN-код: 6214-4430, РИНЦ ID: 879602, ResearcherID: ABT-9293-2022, ORCID: 0000-0002-1303-8871; phd_76@mail.ru;

Ольга Альбертовна Халтурина — кандидат экономических наук, доцент, доцент кафедры Информационно-аналитического обеспечения и бухгалтерского учета; **Новосибирский государственный университет экономики и управления (НГУЭУ)**; 630099, Россия, г. Новосибирск ул. Каменская, д. 56; РИНЦ ID: 709077, SPIN-код: 8402-0899, ORCID: 0000-0001-6264-3042; olga_andre@mail.ru.

Contribution of the authors: the authors contributed equally to this article.
The authors declare no conflicts of interests.
Заявленный вклад авторов: все авторы сделали эквивалентный вклад в подготовку публикации.
Авторы заявляют об отсутствии конфликта интересов.

Corresponding author: Nataliya E. Tereshkina, phd_76@mail.ru.
Автор, ответственный за переписку: Наталия Евгеньевна Терешкина, phd_76@mail.ru.

The article was submitted 22.07.2025; accepted for publication 28.08.2025.
Статья поступила в редакцию 22.07.2025; принята к публикации 28.08.2025.