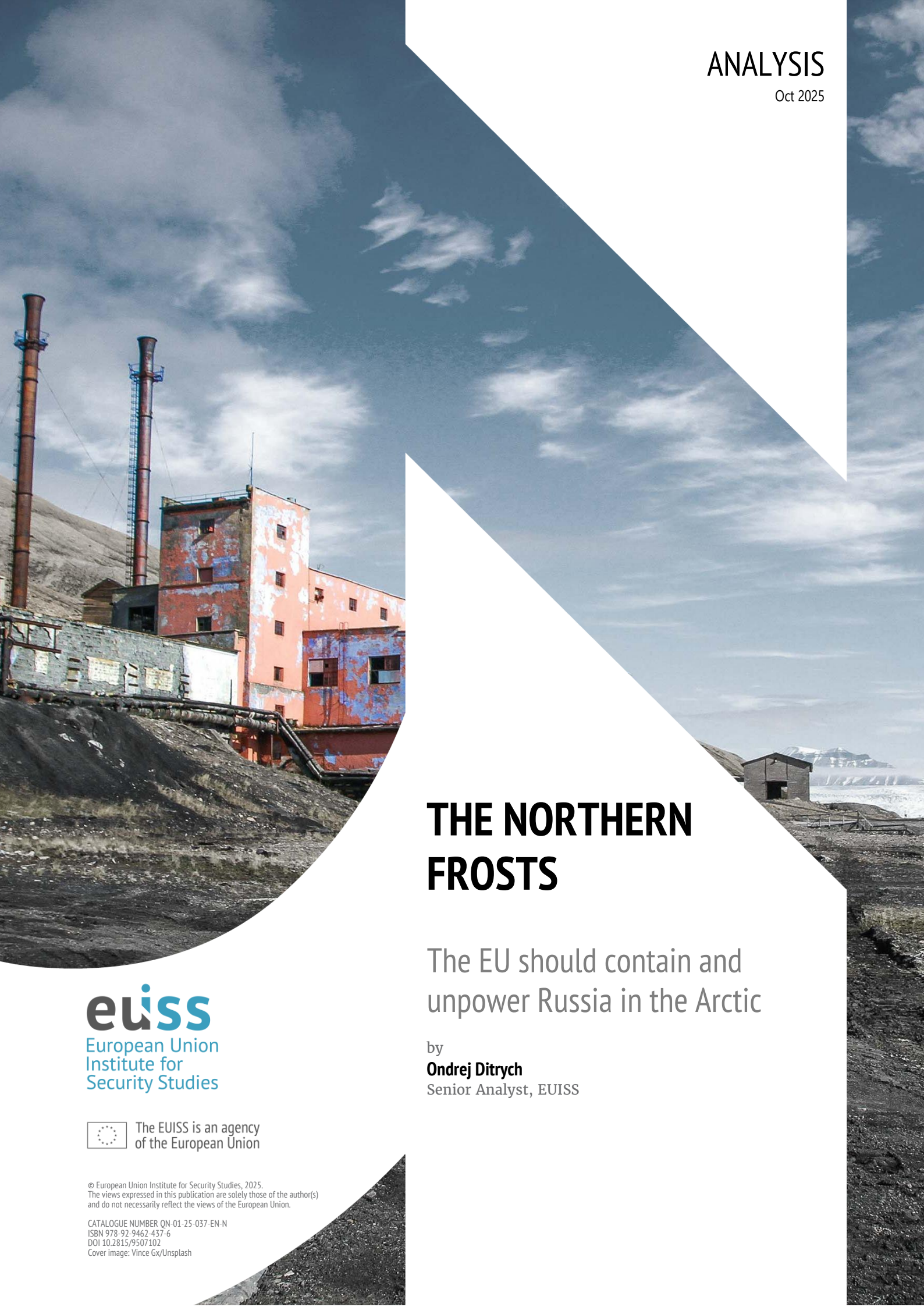

ANALYSIS

Oct 2025

THE NORTHERN FROSTS

The EU should contain and unpower Russia in the Arctic

by
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Summary

> The Arctic is both a source of Russian power and vulnerability. The EU should regard the region as a strategic theatre and seek to 'unpower' Russia there.

> Russia's economy and deterrent posture hinge on the Arctic. However, sanctions, capital and technology shortages, as well as the effects of thawing permafrost, are undermining infrastructure and profitability, while Russia's war against Ukraine diverts military resources and attention. Despite rising geopolitical tensions, this makes open conflict unlikely and drives Moscow to step up its use of hybrid tactics against NATO adversaries.

> The EU should develop its policy around two core priorities: *constraining* Russia's income from the region, and *countering* hybrid threats. The first should focus on ending LNG imports and transshipment, denying maintenance to carriers, expanding action against the shadow fleet, and reducing reliance on Rosatom. The second should encompass a dedicated dialogue with Norway, enhanced cooperation with other partners like Canada, and the use of assets like the EU Satellite Centre (SatCen) to coordinate and strengthen responses to Russia's hybrid campaigns.

The Arctic is a pillar of Russia's power. It is also its Achilles' heel. As the challenge Russia poses to European security intensifies, the EU must devote more attention and resources to the region in its efforts to unpower Russia – limiting Moscow's capacity to wage war in Europe and harm the EU's interests elsewhere.

The Arctic is a key strategic region for Russia, with mineral extraction playing a central role in sustaining the state's economy. Russia enjoys certain relative advantages in the Arctic compared to competitors, including a strong military presence and unrivalled icebreaker fleet. However, its inability to mobilise sufficient investment for development, or even to maintain basic infrastructure in a region increasingly affected by thawing permafrost, represents a major challenge to its economic model. Meanwhile, the Kremlin's need to divert available resources to its war of aggression against Ukraine constrains its ability to expand and consolidate its military footprint in the Arctic. Acknowledging the region's growing geopolitical importance – and taking a clear-eyed view of Russia's strengths, vulnerabilities and tactics – the EU should designate the Arctic as a region of strategic interest. It must act swiftly to curtail Russia's revenues from Arctic resources while limiting the risks posed by its hybrid campaigns to EU interests.

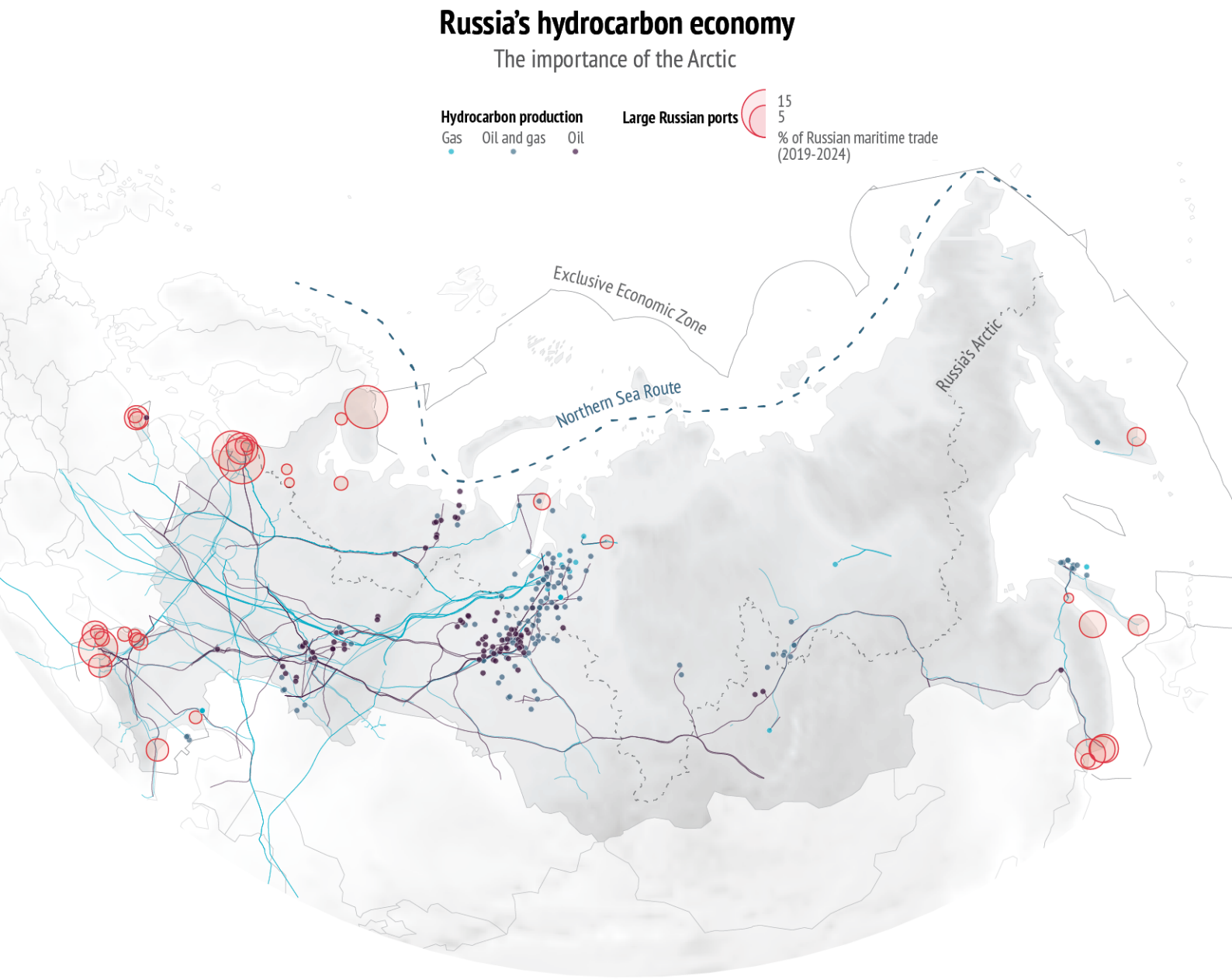
RUSSIA AND THE ARCTIC: LOOMING VULNERABILITIES

Russia could not exist in its current form without its Arctic territories, which occupy more than 25% of Russian landmass[1]. Its resource-oriented economy, where hydrocarbons and ores make up around 60% of exports, relies heavily on Arctic exploration. Over 80% of Russia's gas and approximately 17% of its oil are produced in the Arctic, with 80% of estimated untapped oil resources located there[2]. However, as the more accessible resources are being depleted by extraction, over two thirds of remaining reserves are increasingly hard to reach. For Putin's regime, the Arctic is a 'strategic resource base' (стратегическая ресурсная база)[3]. Moscow's interest in resource exploration has driven it to claim large areas of the Arctic region, including 70% of the Arctic Ocean shelf beyond its exclusive economic zone (EEZ), arguing that the Lomonosov and Mendeleev submarine ridges are natural extensions of the Siberian land mass. The Northern Sea Route (NSR) features prominently in Moscow's plans both to stimulate socioeconomic development in its Arctic zone[4] and to establish a viable alternative to major global maritime routes. Russia harbours

Data: woodwellclimate.org, 2025; EUISS research based on media outlets, 2025; European Commission, GISCO, 2025

ambitious plans to develop its port terminals, expand the icebreaker fleet and deploy a network of infrastructure along the route[5]. The current infrastructure, fleet and permits to navigate the NSR, which Russia contentiously claims to be an internal waterway – imposing an increasingly restrictive navigation regime for foreign vessels[6] – is operated by Rosatom. While it has consolidated its position as sole logistics operator to ensure better coordination of Arctic trade and supply flows, it is significant that Rosatom has not been subjected to EU or G7 sanctions since 2022 largely due to its central role in the global nuclear fuel market. Finally, the Arctic is fundamental to Russia's national security as it is home to the Northern Fleet.

The importance of the Arctic is underscored in key strategic documents such as Russia's Foreign Policy Concept (2023)[7], where it is ranked as the second most strategically important region next to the 'near abroad', or the Maritime Doctrine (2022)[8]. It also likely features prominently in the new naval development strategy issued in June 2025. Moreover, the government appears keen to update its long-term Arctic development strategy (the current one was adopted in 2020) with a renewed focus on the exploration and control of Arctic resources amid intensifying geopolitical confrontation with the West. This heightened focus on the Arctic comes as no surprise as Vladimir Putin has consistently treated regional development as a matter of strategic importance



Data: Global Energy Monitor, 2025; Marine Regions, 2025; Arctic Portal, 2025; Global Energy Monitor, 2025; IMF, Portwatch, 2025; European Commission, GISCO, 2025

over the years. That being said, there are manifest frictions in how Russia translates strategic objectives into operational practice.

One such friction is a result of competing domestic positions[9]. On one side security officials led by Nikolai Patrushev, currently head of the reconstituted Maritime Collegium, are pushing for further militarisation of the Russian Arctic and its closure to foreign presence. On the other side are economic technocrats who recognise that ambitious development goals cannot be achieved without external – notably Chinese – capital. This faultline then gives rise to tensions in framing other, more specific issues. For example, the NSR is both closely restricted and controlled as a national security asset and marketed as a global commercial waterway.

Compared to other global regions where Moscow's ability to project military and economic power is more constrained, Russia notionally enjoys certain advantages in the Arctic – notably its military presence and a fleet of nearly 60 icebreakers, including a unique subfleet of eight nuclear-powered vessels[10], larger than the rest of the world's combined. However, these strengths are offset by significant vulnerabilities and risks.

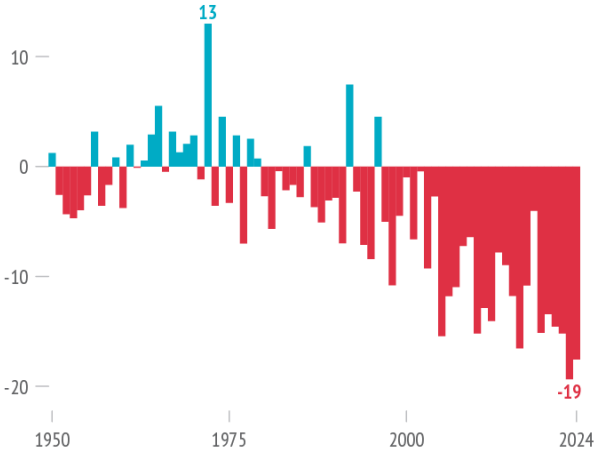
China plays a calculating and opportunistic role as Russia's partner in the Arctic. Although it presents its engagement as focused on research,

environmental protection and commercial ventures[11], with the 'Polar Silk Road' framed as part of the 'Belt and Road' global connectivity initiative, China's deepening ties with Russia, manifested notably by joint air and naval military exercises across the Bering Strait, have raised concern among the other Arctic states. Similar unease surrounds its dual-use research activities, including the testing of technologies in polar conditions that could be weaponised for military purposes, such as unmanned underwater vehicles (UUVs).

Beijing has been keen to expand its presence – an ambition that has at times unsettled Moscow[12]. However, it remains cautious, for the time being at least, holding back from investing heavily in major infrastructure projects, and even suspending participation in some projects to avoid Western sanctions[13]. China's interest in the NSR led to the creation of a bilateral Subcommission on Cooperation on the Northern Sea Route in 2024. Rosatom and Chinese NewNew Shipping are looking to build seven new Arc7-class container ships to navigate the NSR, but the timeline, the prospects for improved transit conditions due to receding ice, and overall economic profitability remain uncertain. Moscow's dream of year-long navigation along the route which could deliver 150 million tonnes of cargo per annum[14] – in itself not an overwhelming figure, representing one tenth of current Suez traffic and one third of Bosporus volumes – appears unrealistic for the foreseeable future. The deepening interdependence of Russia and China suggests that potential frictions will likely be contained rather than escalate into conflict in the short term. China, meanwhile, will also remain satisfied with buying discounted Russian hydrocarbons. But expectations concerning the volume of Chinese investment needed to develop the Russian Arctic will probably remain unfulfilled: a result both of Beijing's caution and constraints imposed by Moscow's securitisation of the zone, which runs counter to China's vision of integrating a freely navigable NSR into its global connectivity schemes.

Less frost in the Arctic

Frost days (minimum temperature below 0°C)
in the Arctic region* related to 1961-1990 baseline



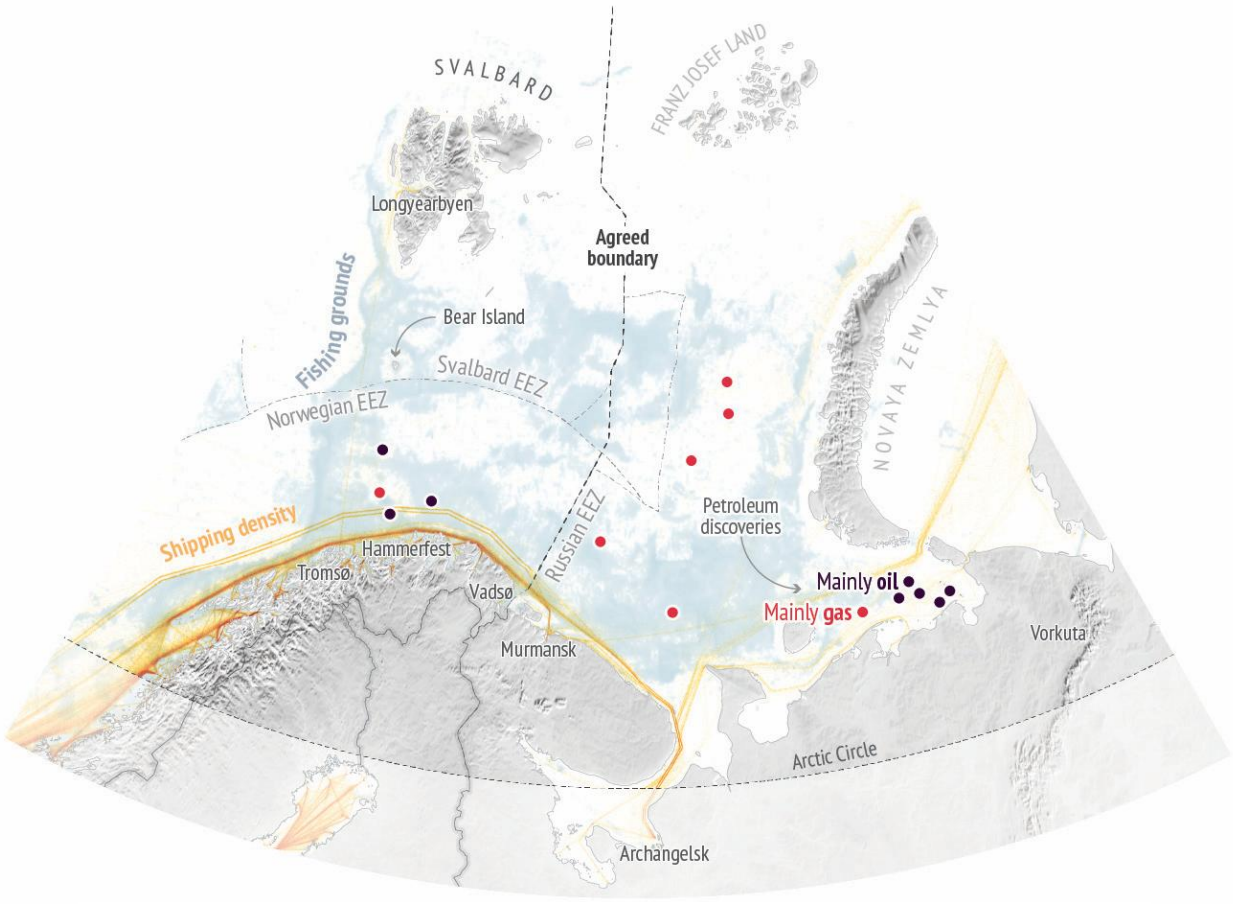
Data: Copernicus Climate Change Service,
Climate Change Atlas, 2025;
* Arctic region includes: Arctic Ocean, Russian Arctic,
Greenland/Iceland, N.E. North America, N.W. North America

This is a serious problem for Russia. It will not be able to develop the Arctic zone without substantial foreign resources and technology[15], access to which is now severely restricted by Western sanctions[16]. Without massive investment, Russia will struggle even to maintain existing infrastructure, already under threat due to thawing permafrost. Given its heavy reliance on hydrocarbon exploitation, and the absence of any viable alternative sector even in the long term, the impact of thawing permafrost represents a major threat to the very foundations of the Russian state's economic model. Against this backdrop, unmet development objectives [17] pale in comparison to the scale of this challenge. Some 65% of Russia's territory lies on permafrost, and much of its oil and gas infrastructure – including mining facilities and major pipelines such as Yamal and Power of Siberia – is at risk from the thawing of the 'permanently frozen' ground, with 45% of extraction sites located in high-risk zones[18]. Industrial facilities face similar dangers, as highlighted by the Nornickel power plant environmental disaster in Norilsk in 2020, where 21 000 tonnes of diesel fuel leaked into the Ambarnaya river due to corrosion in a rusty tank. Military installations, including those hosting Russia's strategic bombers, are also threatened. Thawing permafrost is thus not just a matter of economic but also of 'hard' security. The risks are

set to increase due to the feedback loop of regional warming caused by methane released from the ground and the rising incidence of boreal fires. The Melnikov Permafrost Institute in Yakutsk acknowledges these dangers, but the adaptation costs it projects in its reports remain unrealistically low.

In the military domain, the Northern Fleet is undergoing modernisation[19], yet Moscow remains anxious about the possibility of NATO denying it access to the Atlantic Ocean. These concerns have deepened with Finland and Sweden's accession to the Alliance. In the past decade, Russia has rebuilt or established dozens of Arctic military sites, stretching from the Kola Peninsula to the New Siberian Islands and Chukotka – notably, Nagurskoye (Russia's northernmost military base) and the Kotelny Island airfields. However, Russia's war against Ukraine has led to withdrawals and losses among its Arctic units, rendering plans for force expansion, including the creation of a new army corps in Karelia near the EU's borders, unlikely to materialise. Moreover, Arctic military assets have not been spared the direct impact of the war, as Olenya air base near Murmansk was hit by drones in September 2024 and again, more extensively, during Operation *Spiderweb* in June 2025. Finally, Russia conducts regular exercises in the region, including with China. While these manoeuvres may signal intentions and possible future conflict scenarios[20], they cannot compensate for the constraints on Russia's actual ability to project military power.

This explains why the Kremlin resorts to hybrid tactics in the Arctic to strengthen its position and limit what it perceives as risks associated with NATO's presence. Svalbard, where Russia has a legal right to maintain settlements and conduct mining operations, has become a focal point of Russia's recent hybrid activities[21]. This Norwegian territory located just north of the Kola Peninsula and at the tip of the 'Bear Gap' is key for vessels exiting the Barents Sea[22]. Russia's



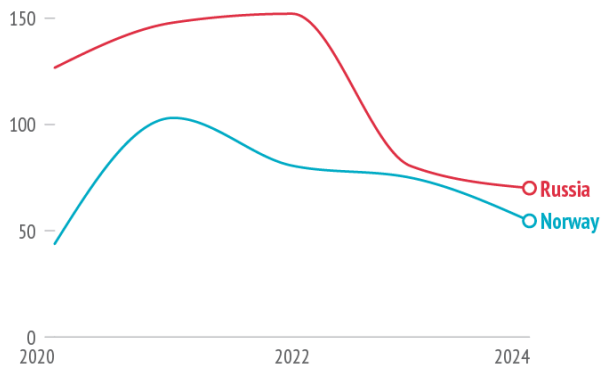
Data: Fridtjof Nansen Institute, 2011; World Bank, Global Shipping Traffic Density, 2021; Global Fishing Watch, Apparent Fishing Effort, 2025; Flanders Marine Institute, Marine Regions, 2025; European Commission, GISCO, 2025; Natural Earth, 2025

hybrid tactics in Svalbard include symbolic displays intended to project Russia's 'civilisational' presence in the Arctic, such as Immortal Regiment parades or the erection of an Orthodox cross adorned with a St. George ribbon in Pyramiden. They also encompass other deliberately provocative actions recently orchestrated by Ildar Neverov, head of the mining company Artikugol, and Andrei Chemerilo, the GRU-linked Consul General in Barentsburg[23]. These activities, often filmed and widely disseminated, serve propaganda purposes while subversively probing Norwegian responses.

Overall, Russia's hybrid playbook mirrors tactics used in other regions. These include disinformation campaigns; the use of fishing vessels for spying; the suspected sabotage of undersea cables near the Faroe Islands and Svalbard (where increased activity by GUGI, the Deep Sea Research Directorate, has also been reported in this context); signal jamming; and the weaponisation of indigenous populations, all while propagandistically portraying Russia as a peaceful, cooperative and 'responsible' actor. However, to foment internal political frictions, exert pressure and challenge the sovereignty of other actors, Moscow also exploits the Arctic's unique political and legal circumstances – ranging from the autonomy of the Faroe Islands to the special legal regimes governing Svalbard and fisheries.

Catch around Svalbard

Fish, thousand tonnes



Data: Fiskeridirektoratet, *'Fangst fordelt på fangstområde'*, 2025; Federal Agency for Fisheries of the Russian Federation, *'Статистика и аналитика – Сведения об улове рыбы и добыче других водных биоресурсов'* [Statistics and analytics – Data on fish catch and extraction of other aquatic biological resources]

TWO 'CS' FOR THE EU'S MORE STRATEGIC ENGAGEMENT

The EU should take more interest in the Arctic. It must not give up on environmental protection and sustainable development[24] in a region that continues to suffer disproportionately from the effects of climate change[25] – especially not now, as the quest for new sources of critical minerals, some of which are located in accessible locations in the Arctic, is essential to advance the green transition and reduce strategic dependencies. With the Arctic Council, the key regional cooperation forum, paralysed, the EU has an opportunity to exercise more leadership in these areas, in line with its broader climate and sustainable development goal (SDG) commitments, and in collaboration with partners like Canada.

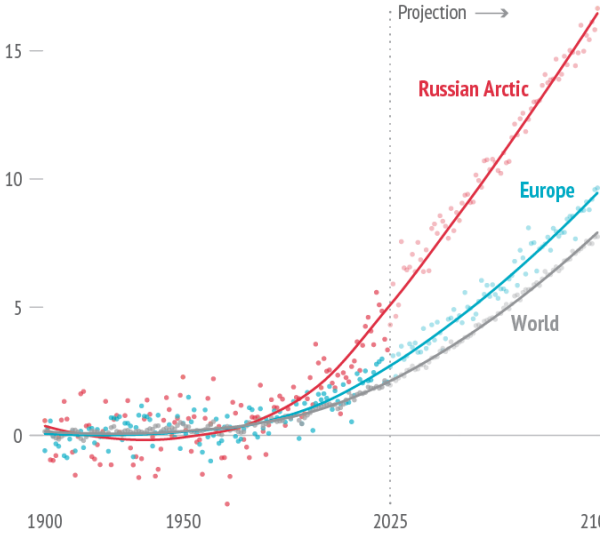
At the same time, the EU and its partners in the region should respond jointly to the reality of intensifying geopolitical frictions. Long considered an 'exceptional' region largely insulated from open power struggles, the Arctic is now emerging as a key arena of global geopolitical competition, as diminishing sea ice[26] unlocks the economic potential of mineral resource extraction and new transcontinental maritime routes. The EU needs to adjust to this reality in its broader efforts to limit and counter Russia's attempts to undermine European security and economic interests worldwide.

While focusing efforts on curbing Russia's power in the region, and keeping a close watch on China's ambitions and moves, the EU must also consider the potential implications of shifts in US policy – ranging from the renewed interest in acquiring Greenland to the possibility of restoring cooperation with Russia on Arctic exploration. Keen to regain access to US technologies and to secure international legitimacy for its hydrocarbon sector, the Kremlin has been trying to lure the Trump administration into renewed cooperation on Arctic exploration[27] – most recently at the meeting between the two presidents in Anchorage in August 2025. A breakthrough, however, is unlikely in the foreseeable future. By and large, and with the

possible exception of giants such as Exxon, US companies show little appetite to return to Russia[28], deterred by geopolitical risks, state *dirigisme*, and likely resistance from local businesses bound to the state through dense clientelist networks. Nevertheless, even if a future *rapprochement* between the US and Russia yields little in terms of economic benefits, it may provide mutual legitimisation in a new game-of-oligopoly contest over the Arctic. In this context, the EU's policies in the region must go beyond responding to climate change, protecting the environment and promoting sustainable development – important as those priorities remain.

Warming in Russia's Arctic above average

Mean of daily temperature (°C) (annual) - CMIP6 - Change related to 1850-1900 period



Data: Copernicus Climate Change Service, Climate Change Atlas, 2025

Compared with the marginal place occupied by the Arctic in the EU's policymaking in the 1990s – then limited to common fisheries and transport, environment, energy, or industry regulation – the EU's latest Joint Communication on the region (2021)[29] already marked significant progress by making an appeal for stronger engagement. Now, it is time to revisit the EU's Arctic policy and set new strategic priorities developed around two 'Cs', both linked to the overarching goal of weakening Russia's power:

1. *constraining* the revenue stream that Moscow uses to wage its war against Ukraine; and
2. *countering* Russia's hybrid campaigns that undermine the EU and its partners while helping to prevent conflicts that could spill over beyond the region.

The first step toward this coordinated response is for the EU to understand the Arctic (or 'Northern' theatre) holistically as a strategic region where certain of Russia's activities pose a set of shared challenges. This perspective should inform a new strategic approach that takes account of these realities, supported by the strengthening of the European External Action Service's capacities (notably the office of the Arctic envoy) and better institutional coordination on Arctic issues. This will take time. However, the EU can also take immediate action on the two Cs.

The EU should recognise, and help to further expose, the myth of the Russian Arctic as a global mineral bonanza. Access to mineral deposits and the profitability of exploration (contingent on global commodity prices) will remain an issue in the foreseeable future while diminishing accessible reserves, underdeveloped infrastructure and thawing permafrost threaten to destabilise the resource-extraction model that underpins the Russian economy – without any clear alternative in sight.

The depletion of easily accessible resources and the adverse effects of climate change will contribute to eroding Russia's power in the long term. However, the EU should not wait for this to unfold, but take direct action to curtail the flow of profits from current Arctic exploration that funds Russia's war of aggression against Ukraine and keep Putin's authoritarian regime afloat. EU sanctions now include a ban on transshipment of Russian liquefied natural gas (LNG) through EU ports as well as a ban on investment and providing goods, technology and services for the completion of exploration projects such as Arctic LNG 2 or Murmansk. The EU also continues to broaden the scope of its sanctions targeting the shadow fleet vessels used to transport Russia's oil. However, more can be done. In 2024, the EU imported a record volume of Russian LNG (accounting for a 20% share of imports), mostly originating from the Arctic[30] – 80% of shipments from the port of Sabetta, where Yamal gas is loaded, were destined for Europe[31]. Building consensus on terminating Russian LNG imports – even if some are diverted, at higher cost, to other

less lucrative markets – and stronger action against the shadow fleet are key measures that would put a major dent in Russia's Arctic exploration revenues. The EU should also follow through on its decision to end LNG imports within the shortest possible timeframe while immediately denying maintenance for the Arc7-class LNG tankers used to transport gas from Yamal. Finally, the EU should move towards ending dependence on Rosatom nuclear fuel supplies. Beyond severing ties with a company deeply embedded in Russia's defence-industrial complex – raising both ethical concerns and strategic risks[32] – a credible threat of sanctions that would disrupt Rosatom's role in NSR operations would offer the EU a powerful tool of influence in future dealings with Moscow. So far, Rosatom has avoided listing because of the reliance of several Member States in Central and Eastern Europe on supplies of nuclear fuel for VVER reactors, combined with limited overall trade volume in nuclear fuel compared to fossil fuels. However, efforts to diversify fuel supplies should receive more priority and the overall calculus should account also for wider potential benefits arising from the threat of the EU sanctioning Rosatom.

Despite some relative strengths, Russia faces significant military constraints in the Arctic region. Therefore, it is unlikely that Moscow would engage in an open military confrontation with other Arctic states to secure its extensive territorial claims in the foreseeable future. Conversely, more brazen and aggressive asymmetric actions challenging their sovereignty are a more probable scenario. Finland and Norway are likely targets judging on past record, the latter due to its jurisdiction over Svalbard and its stakes in the Barents Sea[33].

The EU has extensive experience in countering Russia's hybrid playbook and should use this to propose a dedicated dialogue with Norway on hybrid threats, building on earlier expert consultations. Norway, which is currently reassessing its reassurance policy *vis-à-vis* Russia – a policy entailing voluntary restrictions to signal a non-threatening defence posture – faces persistent pressure from Moscow's hybrid activities. Such a dialogue can be of mutual benefit to both sides by enabling comprehensive assessment and identification of emerging new patterns in foreign information manipulation and interference (FIMI). It could also cover related activities, such as targeting of critical undersea infrastructure – an area of particular concern in light of Russia's recent subversive activities in the Baltic and its new security approach to the Black Sea[34], where increased GUGI activity has also been reported. The EU can further leverage its expertise in joint discussions on hybrid security with Iceland and in supporting the country's forthcoming new security and defence policy.

Countering Russia's malign activities in the Arctic is a shared priority also with partners like Canada and the UK, with whom the EU is seeking to deepen ties. Whereas NATO, as the primary security provider for the Western Arctic states, has been boosting awareness and contingency planning *vis-à-vis* the growing Russian threat in the Arctic, the EU also has tools to strengthen collective security. In addition to sharing experience and developing a joint response to Russia's hybrid tactics, the EU can also contribute to the evolving security picture, for example through the provision of imagery intelligence from SatCen. Finally, hand-in-hand with its more ambitious sustainable development role, the EU can also contribute to regional security in the Arctic by performing a trustworthy normative role, firmly opposing any threats to the sovereignty of the Arctic states – whatever their origin. With the notion of the Arctic as an 'exceptional' region free of geopolitical conflict now more distant than ever, the EU should take a credible stance in defence of global international law and the inadmissibility of actions that undermine its core principles.

This is the roadmap. Adopting a more strategic approach to the Arctic, focused on unpowering Russia, will cost precious time and resources. Yet it is an investment. If the EU is serious about strengthening European security and promoting its interests on the global stage while upholding the norms it espouses, it must match its words with commitment.

The author would like to thank Carole-Louise Ashby and Koen Claessen, EUISS trainees, for their invaluable research assistance.

[1] While the Arctic is commonly defined as an area delimited by the isotherm line (average temperature below 10°C in July) or the Arctic Circle, Russia's Arctic zone (Арктическая зона Российской Федерации) is defined administratively to include 9 regions of the Russian Federation: the Republics of Karelia, Komi and Sakha; the Murmansk and Arkhangelsk regions; the Nenets, Yamalo-Nenets, and Chukotka autonomous Okrugs; and the Krasnoyarsk Territory. Russia furthermore makes extensive territorial claims on the Arctic Ocean.

[2] Arctic Council Secretariat, 'The Economy of the North', May 2021 (http://hdl.handle.net/11374/2611); 'Oil and gas', *Arctic Review* (https://arctic.review/economy/oil-and-gas/); Rosgeo coalition of authors [коалиция авторов Росгео], 'Half a century of offshore oil and gas exploration on the Russian shelf' [Полвека морской нефтегазовой разведки на российских шельфах], 21 October 2024 (https://blog.rusgeology.ru/category/polveka-morskoy-neftegazovoy-razvedki-na-rossiyskikh-shelfakh).

[3] Government of the Russian Federation, 'Foundations of the state policy of the Russian Federation in the Arctic' [Основы государственной политики Российской Федерации в Арктике], 18 September 2008 (http://static.government.ru/media/files/A4qP6brLNJ175I40U0K46x4SsKRHGfUO.pdf). See also Presidential Decree No. 645 on the strategy for the development of the Arctic Zone, 26 October 2020 (http://publication.pravo.gov.ru/Document/View/0001202010260033).

[4] The population of Ruasia's Arctic zone has fallen by two thirds since the collapse of the USSR, driven by the economic downturn of the 1990s and harsh living conditions. The government is trying to attract workers through infrastructure investments and incentives, but faces resource constraints.

[5] See Ministry of Transport of the Russian Federation, 'Passport of the federal project "Development of the Northern Sea Route"' [Паспорт федерального проекта "Развитие Северного морского пути"], 10 August 2023 (https://mintrans.gov.ru/documents/8/12714).

[6] In addition, Moscow relies on a broad interpretation of Art. 234 of UNCLOS, known as the 'ice clause', which grants coastal states rights to restrict navigation to prevent marine pollution.

[7] President of Russia, 'Decree on approval of the concept of foreign policy of the Russian Federation' [Концепция внешней политики Российской Федерации], 31 March 2023 (http://kremlin.ru/events/president/news/70811).

[8] 'Maritime Doctrine of the Russian Federation' [Морская доктрина Российской Федерации], 31 July 2022 (http://static.kremlin.ru/media/events/files/ru/xBBH7DL0RicfdtdWPol32UekiLMTAycW.pdf).

[9] See e.g. Komin, M. and Hosa, J., 'The bear beneath the ice: Russia's ambitions in the Arctic', ECFR, 27 May 2025 (https://ecfr.eu/publication/the-bear-beneath-the-ice-russias-ambitions-in-the-arctic/#methodology).

[10] This fleet comprises 4 new-generation Arktika-class icebreakers (*Arktika*, *Sibir*, *Yakutia* and *Ural*) as well as *Yamal*, 50 *let Pobedy* and the shallow-draught *Taymir* and *Vaygash*, which are able to enter frozen river mouths.

[11] State Council of the People's Republic of China, 'China's Arctic Policy', January 2018 (https://english.www.gov.cn/archive/white_paper/2018/01/26/content_281476026660336.htm). China's permanent presence is currently limited to a research station at Ny-Ålesund on Svalbard, and the CNARC observatory in Karholl, Iceland.

[12] Judah, J. and Troianovski, A., 'Secret Russian intelligence document shows deep suspicion of China', *New York Times*, 7 June 2025 (https://www.nytimes.com/2025/06/07/world/europe/china-russia-spies-documents-putin-war.html).

[13] In December 2023, China National Petroleum Corporation (CNPC) and China National Offshore Oil Corporation (CNOOC) suspended financing for Novatek's LNG-2 project, although China's Wison New Energies continued discreet deliveries of gas turbines and technologies to the project in an effort to evade sanctions. CNPC and the Silk Road Fund still own a combined 29.9% stake in the Yamal LNG project. Chinese companies also participate in the development of Paykha (Taymyr), though with no equity stake. Other projects in which China has expressed interest such as the Belkomur railway or Polar Express fibre optic cable face significant delays, however; and the investment in these or in the expansion of Arkhangelsk deep water port is uncertain, at least as long as US sanctions are in place.

[14] Government of the Russian Federation, 'A Development plan for the North Sea Route' [План развития Северного морского пути на период до 2035 года], 1 August 2022 (http://static.government.ru/media/files/StA6ySKbBceANLRA6V2sF6wbOKSyxNzw.pdf).

[15] At the latest Russian Arctic Forum in Murmansk in March 2025, Kirill Dmitriev, CEO of the Russian Direct Investment Fund, announced the plan to establish a special development fund that would attract capital from the Persian Gulf states but also a 'number of Western' countries. How much equity will be raised in reality remains to be seen, however.

[16] The resource issue plays a role also, for example, in the efforts by Artikugol, a Russian state-owned mining company on Svalbard, to attract Chinese investment for building a new research station in Pyramiden, potentially under the BRICS+ framework.

[17] In 2024, under 40 million tonnes of cargo were transported along the NSR, around 50% of the target volume. The majority of the shipments were of gas, dispatched from Yamal and primarily destined for China. Gazprom Neft, Lukoil and Norilsk Nickel also participated in the eastward shipments.

[18] Hjort, J. et al., 'Degrading permafrost puts Arctic infrastructure at risk by mid-century', *Nature Communications*, 11 December 2018 (https://www.nature.com/articles/s41467-018-07557-4).

[19] Fundamental to maintain Russia's second-strike capability, the Northern Fleet operates an estimated 31 submarines including the most recently commissioned Borei-A class [Князь Пожарский]. This is a second Borei-A class submarine, capable of carrying up to 16 Bulava SLBMs. Altogether, 6 of these submarines are planned to be commissioned for the Northern Fleet. The coming Yasen-M submarines are furthermore capable of mounting new Zirkon hypersonic cruise missiles. See Kristensen, H., Korda, M., Johns, E. and Knight, M., 'Russian nuclear weapons', *Bulletin of the Atomic Scientists*, 13 May 2025 (https://thebulletin.org/premium/2025-05/russian-nuclear-weapons-2025/).

[20] See CSIS, 'Arctic Military Activity Tracker' (https://arcticmilitarytracker.csis.org/).

[21] This right is guaranteed under the Svalbard Treaty (1920). Pyramiden (now largely abandoned and dilapidated) and Barentsburg (where mining has also declined) are two Russian settlements in Svalbard.

[22] In addition to the Bear Gap, the 'GIUK' gap is another potential barrier for Russian submarines. It covers the area between Greenland, Iceland and the United Kingdom separating the Norwegian Sea and the North Atlantic.

[23] Jonassen, T., 'NRK: Svalbard's Russian Consul is an agent', *High North News*, 26 April 2023 (https://www.highnorthnews.com/en/nrk-svalbards-russian-consul-agent).

[24] This has been recently underscored in the European Ocean Pact. See European Commission, 'The European Ocean Pact' COM(2025) 281, 5 June 2025 (https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=COM:2025:281:FIN).

[25] Rantanen, M. et al., 'The Arctic has warmed nearly four times faster than the globe since 1979', *Communications Earth & Environment*, 11 August 2022 (https://www.nature.com/articles/s43247-022-00498-3).

[26] See European Environment Agency, 'Arctic and Baltic sea ice', 10 January 2025 (https://www.eea.europa.eu/en/analysis/indicators/arctic-and-baltic-sea-ice).

[27] The Tomtor rare earth deposit in Yakutsk, recently taken over by Rosneft, has been mentioned as one potential area of joint exploration in this context.

[28] ExxonMobil's partnership with Rosneft was terminated in 2018 while other major energy companies like Halliburton and Baker Hughes wound up their operations after Russia's full-scale invasion of Ukraine in 2022.

[29] European Commission, Joint Communication, 'A stronger EU engagement for a peaceful, sustainable and prosperous Arctic', JOIN(2021) 27, 13 October 2021 (https://www.eeas.europa.eu/sites/default/files/2_en_act_part1_v7.pdf).

[30] Humpert, M., 'EU imports more Russian LNG in 2024 than ever before, mostly from the Arctic', *High North News*, 6 January 2025 (https://www.highnorthnews.com/en/eu-imports-more-russian-lng-2024-ever-mostly-arctic).

[31] 'LNG export from the Yamal LNG project in 2025', Centre for High North Logistics, 4 April 2025 (https://chnl.no/news/lng-export-from-the-yamal-lng-project-in-2024/).

[32] Lapenko, O. et al., 'Ending European Union imports of Russian uranium', Bruegel, 14 April 2025 (https://www.bruegel.org/analysis/ending-european-union-imports-russian-uranium).

[33] Some potential scenarios could include attempts to revisit the juridical *status quo* over Svalbard, for example by forcing a condominium arrangement that the USSR unsuccessfully pressured Norway to accept after World War II, or even seizing Bear Island, a small island under Svalbard's administration strategically located between the Barents and Norwegian seas.

[34] European Commission, Joint Communication, 'The European Union's strategic approach to the Black Sea Region', JOIN(2025) 135, 28 May 2025 (https://enlargement.ec.europa.eu/document/download/170d9b3a-d45f-4169-80fa-9adb753c0921_en?filename=EU%20Strategic%20Approach%20Black%20Sea%20Strategy.pdf).