

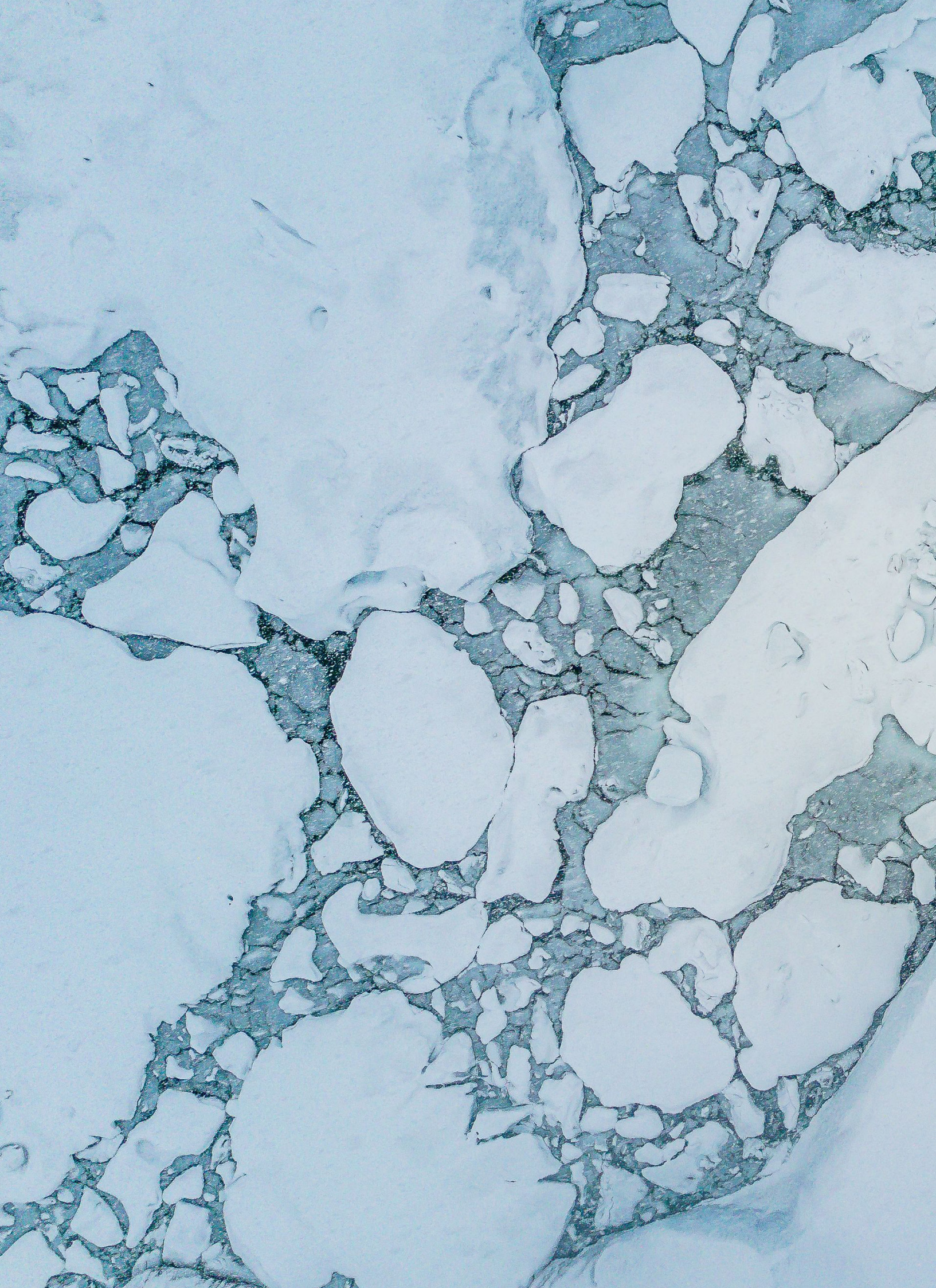
MINTEL WORLD

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The Struggle for
Access in the Arctic:
New Moves by China,
Russia and NATO

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EDITOR'S NOTE

The Arctic is undergoing a profound structural shift, evolving from a arena of scientific cooperation into a unified strategic battleground. As detailed in this issue, the region's competition extends far beyond classic military posturing. Infrastructure, sovereign access, and supply chain security are now key focal points of geopolitical leverage.

From China and Russia commercializing the Northern Sea Route to counter Western sanctions, to NATO's multi-domain surveillance networks and the joint Western ICE Pact, control over the Arctic now rests on access capabilities—namely icebreakers, satellite networks, underwater domain awareness, and critical mineral supply chains. This collection of analysis highlights how energy, maritime law, and defense architecture are intersecting across the High North, permanently redefining Northern security.

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THE STRUGGLE FOR ACCESS IN THE ARCTIC: NEW MOVES BY CHINA, RUSSIA AND NATO

Competition over security, energy, transportation and critical resources in the Arctic is increasingly becoming part of a single strategic landscape. Russia and China are making greater use of the Northern Sea Route for energy exports and regular Asia-Europe trade. At the same time, the United States, Canada and European allies are increasing investments in military presence, satellite communications, maritime surveillance, icebreaker capacity and critical infrastructure protection.

Political debates over Greenland, the Russia-US continental shelf dispute and the European Union's upcoming Arctic policy show that competition in the region extends beyond

the military domain. Sovereignty, law, investment and access to resources are becoming equally important.

The main trend is the transformation of the Arctic from an accessible geography into a region where the infrastructure and capabilities needed to maintain access are themselves becoming areas of competition. Icebreakers, ports, satellite networks, underwater surveillance systems, critical mineral supply chains and commercial shipping routes now carry strategic importance comparable to military capabilities.



THE SECURITY SHIFT IN THE EU'S ARCTIC POLICY

Political coordination among Arctic allies is becoming increasingly institutionalized. Canada, the Kingdom of Denmark, Finland, Iceland, Norway, Sweden and the United States are developing a broader approach to Arctic security. Their agenda includes NATO military activities as well as research security, investment screening, critical infrastructure protection and resource development.

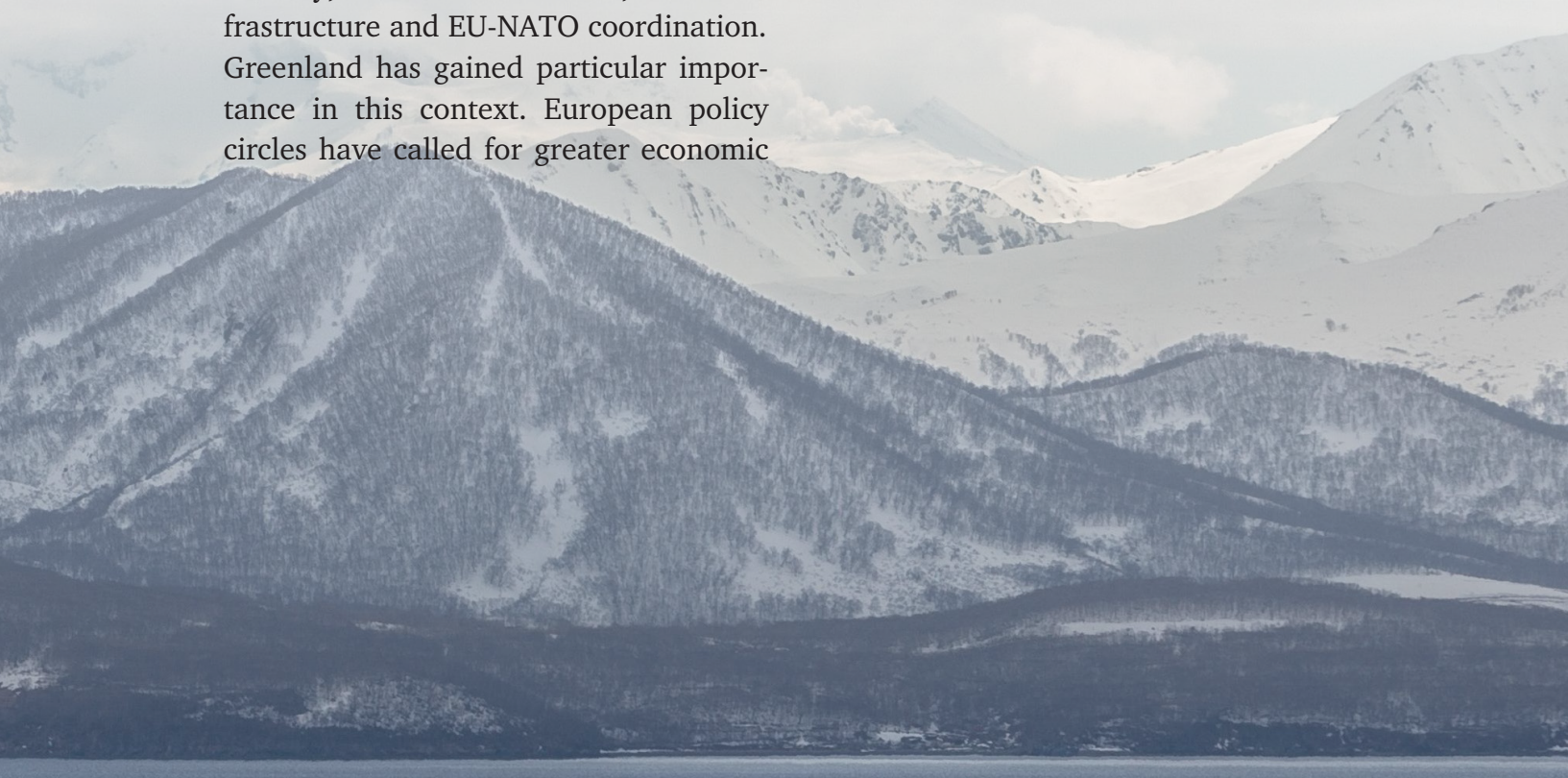
This shift shows that Arctic diplomacy is moving beyond its traditional focus on environmental and scientific cooperation. Economic security and deterrence are now playing a much larger role. A similar transformation is expected in the European Union's Arctic policy, which is due to be updated in autumn 2026.

A European Parliament study argues that the 2021 vision of a "peaceful and sustainable Arctic" is no longer sufficient in the current security environment. The new strategy is expected to give greater emphasis to security and defence, energy security, critical raw materials, subsea infrastructure and EU-NATO coordination. Greenland has gained particular importance in this context. European policy circles have called for greater economic

and technical support for Nuuk in response to Washington's pressure over Greenland. They have also advocated stronger investment in critical minerals. A proposed molybdenum investment of around €50 million shows how geopolitical competition is increasingly being pursued through economic tools.

Russia's objections to US continental shelf delimitations north of Alaska and in other areas have also brought maritime law and sovereignty disputes back into focus. Moscow has called on Washington to join the UN Convention on the Law of the Sea. This suggests that legal competition over seabed resources and extended continental shelf claims could intensify.

In Northern Europe, Finland and Sweden are advancing a form of "Nordic mini-lateralism." Flexible mechanisms such as NORDEFECO and the JEF are helping bridge institutional gaps between the EU and NATO. Cooperation in exercises, logistics, procurement, cyber defence and hybrid threats is turning Northern Europe into an operational space where NATO and EU policies increasingly overlap.



The Northern Sea Route Moves Toward Regular Trade



The commercialization of the Northern Sea Route, or NSR, is emerging as one of the most important economic developments in the Arctic. Rosatom has authorized seven Chinese vessels to transit to Europe through the NSR. Sea Legend Shipping has also announced plans to operate a weekly container service during the navigation season. This marks an important shift from experimental and one-off voyages toward scheduled commercial shipping. South Korea is also preparing more systematically for the route. PanStar Line plans to conduct a demonstration voyage with the 2,700 TEU PanStar Acro toward the end of August. The ship is expected to reach Rotterdam in around 20 days. Pohang is preparing an “Arctic Shipping Route Specialized Port Master Plan” for Yeongilman Port. Busan is also being positioned as an Arctic logistics hub. These initiatives show that Seoul sees the NSR as a long-term strategic opportunity linked to energy, security, port policy and shipbuilding.

THE ARCTIC CORRIDOR GAINS WEIGHT IN RUSSIAN OIL EXPORTS

The NSR is also becoming increasingly important for Russian energy exports. Tankers carrying around eight million barrels of oil during the early part of the navigation season have already reached roughly 60 percent of the total eastbound Arctic oil volume recorded in the 2025 season. Heavy ice has forced some tankers to avoid the traditional Vilkitsky Strait and sail north of Severnaya Zemlya, above the 81st parallel. This indicates that Moscow is pushing Arctic logistics to reduce the effects of sanctions and limit exposure to geopolitical risks along traditional maritime routes. China’s preparations to use the Longkou LNG terminal as a second receiving point for the sanctioned Arctic LNG 2 project reflect the same trend. Longkou is around 2,000 nautical miles closer for tankers arriving from the north than the existing Beihai terminal. This could make it easier to redirect Russian LNG exports to China through the NSR.

More than 40 cargoes and around 2.6 million tonnes of LNG have reportedly been shipped from Arctic LNG 2 since August 2025. This suggests that sanctions have not completely halted the project.

In the United States, efforts to ease Arctic offshore drilling rules in Alaska are being pursued alongside billions of dollars in critical mineral investments. Washington has highlighted around \$3 billion in new critical mineral projects. It is also seeking to reduce dependence on China for defence-related materials such as rare earth elements, tungsten, germanium and scandium. This shows that Arctic resource policy is becoming directly linked to national security and defence industrial capacity.

**Despite
sanctions,
Russia is
increasingly using
the Arctic corridor
to sustain and
redirect its energy
exports toward
China.**

THE RACE FOR SURVEILLANCE AND DETERRENCE IN THE NORTH

Military activity on NATO's northern flank is increasingly focused on persistent surveillance and rapid force deployment. Russia's launch of the new Yasen-M class nuclear submarine Ulyanovsk and the continued expansion of the Yasen fleet have renewed NATO's focus on submarine tracking, especially along the Kola Peninsula-GIUK corridor.

NATO is responding through initiatives such as Dynamic Mongoose, HEIMDALL and Task Force X-Arctic. These efforts aim to connect unmanned surface, aerial and underwater platforms within a common surveillance network. US-Norwegian activities under Operation Arctic Cohesion 2026, NATO's unmanned maritime system trials under Arctic Sentry and the US-Canadian Tundra Merlin operation reflect this approach on the ground.

During Tundra Merlin, a HIMARS system was transported to Nome aboard a Royal Canadian Air Force C-17. The deployment tested the ability of the United States and Canada to move long-range firepower into remote Arctic areas at short notice. The combined use of land, sea, air and space assets shows that Arctic defence is increasingly being planned around multi-domain operations. Canada's roughly \$2.3 billion ESCP-P military satellite communications contract with Telesat strengthens the infrastructure behind this transformation. The network will combine LEO and MEO systems and is expected to provide secure communications above the 65th parallel. This will support sovereignty operations, NORAD missions and interoperability with NATO.

Denmark and the Faroe Islands are also increasing their military presence through F-35 patrols, frigates, transport aircraft and joint exercises. Denmark is preparing to deploy more than 100 conscripts to Greenland for the first time. Belgium has also announced that 30 personnel will take part in drone and counter-drone training in Greenland under Arctic Sentry in September.

These developments highlight Greenland's expanding role in NATO's northern defence architecture. Icebreaker capacity is also becoming a direct security asset. Construction of the first US Coast Guard Arctic Security Cutter has begun in Finland. This marks the transition of the US-Canada-Finland ICE Pact from political cooperation to actual production.

The 11-vessel program is intended to narrow the West's icebreaker capability gap with Russia and support continuous operational access to the Arctic.

The activities of China's Xue Long and Xue Long 2 research icebreakers off Alaska are also being closely monitored by the United States and Canada. This reflects the increasingly blurred line between scientific and security-related activity. Concerns that these vessels could gather information on submarine operations, the seabed and critical cable infrastructure may lead to greater scrutiny of foreign research missions in the future.



Assessment

The emerging Arctic order cannot be understood simply as a military rivalry between the United States and NATO on one side and Russia on the other.

Western actors are integrating military capabilities with satellite communications, icebreaker production, critical infrastructure, supply chain resilience and critical mineral policy through NATO, NORAD, the EU, NORDEFCO and the ICE Pact.

Russia is combining its nuclear icebreaker fleet, the Northern Sea Route, Arctic oil and LNG projects and submarine forces within the same strategic ecosystem. China is becoming more deeply involved as an energy buyer, shipping actor and research power.

The main area of competition in the Arctic will therefore depend on which actors can build the most reliable and cost-effective networks for transportation, energy, resources and infrastructure. The Northern Sea Route will be one of the clearest indicators of this shift. If China's weekly container service and South Ko-

rea's pilot voyages prove sustainable, the NSR's strategic significance will extend far beyond the initial cargo volumes.

The route could gradually evolve from a Russian energy export corridor into an alternative link within Asia-Europe supply chains. However, the ice conditions seen in 2026, route diversions and the continued need for nuclear icebreaker escorts show that Arctic shipping is still far from becoming a predictable, year-round alternative to the Suez Canal. Arctic competition is increasingly shaped by five interconnected factors: sovereignty, access, infrastructure, resources and surveillance.

Greenland's political status and mineral resources, Russia's NSR and continental shelf policies, China's commercial and research presence, NATO's northern surveillance network and new Western investments in icebreakers and satellites are all par





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