

ARC- TIC

BULLETIN

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EDITOR'S NOTE

In this issue covering the period from 19 September to 3 October 2026, developments in the Arctic region are observed to be shaped by operational capacity and infrastructure steps on the ground rather than political declarations. A wide range of developments—from new defense arrangements in Greenland and combined military and civil evacuation exercises across the Baltic-Nordic axis, to Russia's commercial-military integration along the Northern Sea Route and service/logistics-focused Western sanctions—are increasing the strategic value of the region's ports, airports, and sea lanes. We hope you enjoy reading this analysis of a critical transition period, where sovereignty and the balance of power in the Arctic are no longer defined merely by geographic presence on a map, but by logistics, energy, and security infrastructures operating uninterruptedly year-round under harsh winter conditions.

Levent Kemal

Executive Director, MINTEL WORLD

OVERVIEW

From 19 September to 3 October, the Arctic agenda was shaped by the move from political agreements to practical capacity. New defence arrangements in Greenland, joint missions across the Nordic and Baltic region, and increased activity on the Northern Sea Route all pointed to a more intensive phase of operational planning.

Western actors focused on air and maritime surveillance, command coordination, civilian evacuation, and the resilience of northern infrastructure. Russia moved towards a more integrated use of its northern coastline for production, logistics, and military mobility. These different approaches are giving the same ports, airports, sea lanes, and communications networks greater strategic value.

Energy and sanctions policy followed the same trend. New production projects, demand for ice class vessels, port services, insurance, and alternative links to Asia are becoming core parts of energy policy. The common theme was access. In the Arctic, access increasingly depends on the logistics networks that keep facilities operating throughout the year.





SECURITY

Military Implementation of the Greenland Agreement

The agreement signed by the United States, Denmark, and Greenland on 22 September expanded the 1951 Defence Agreement. The official text allows the United States to modernise and expand its activities at Pituffik Space Base. It also provides for two new defence areas at Narsarsuaq and Mestersvig. The parties will define the technical details separately.

The agreement also leaves room for additional defence areas in the future. Any new site will require a proposal that sets out its location, planned activities, and environmental safeguards. The text also limits permanent military presence in Greenland by non NATO states. Foreign investment in sensitive sectors will be subject to security screening.

Danish Defence Minister Jeppe Bruus told Reuters on 28 September that NATO's growing presence in Greenland and the wider Arctic was expected to be long term. Copenhagen does not want Arctic Sentry to remain a temporary crisis measure. The aim is to turn exercises and patrols into a lasting alliance mission.

Denmark is supporting this approach with unmanned aerial systems. Information released on 1 October showed that the Danish Armed Forces had started test flights with MQ 9B SeaGuardian systems. The training was conducted with the German Air Force. Four MQ 9B aircraft are due to enter service in 2028. One of their main tasks will be to monitor Russian Northern Fleet activity around the GIUK gap.



Arctic Command Architecture and US Capacity

US Northern Command also prepared a new coordination arrangement with the European and Indo Pacific commands. Air & Space Forces Magazine reported that the planned agreement between NORTHCOM, EUCOM, and INDOPACOM is designed to improve information sharing. The goal is to prevent geographic command boundaries from creating security gaps in the Arctic.

This approach broadens Greenland's role in the defence geography of the region. The island is no longer viewed only through the lens of North American defence. It is increasingly treated as a command node where risks from Europe and the Pacific meet. This requires early warning, missile defence, maritime surveillance, and space based systems to work within the same plan.

Physical gaps in US Arctic capacity remain. The US Coast Guard cancelled the Healy icebreaker's autumn 2026 Arctic deployment after a mechanical failure. Healy was one of the Coast Guard's two active Arctic icebreakers. Contracts have been awarded for new vessels, but the first deliveries are not expected before 2028.

Military integration across the Baltic region accelerated during the period. The Swedish government announced on 30 September that Gripen fighters would begin operating in Polish airspace under a NATO mission in October. The aircraft will support NATO's integrated air and missile defence. Their tasks will also include protecting logistics used to support Ukraine in south eastern Poland.

Lithuania is also preparing for the return of US armoured forces. The Defence Ministry said a heavy battalion with Abrams tanks and an engineering battalion would arrive at the end of October. Around 1,000 troops are expected to remain for nine months. The engineering units will support border fortifications and Lithuania's new divisional structure.

Operational integration between Finland and Sweden also reached a new level. On 2 October, the Swedish corvette HMS Helsingborg began operating in the Gulf of Finland under Finnish command. This was the first time a Swedish warship had served under Finnish military command. The mission will support border security and maritime surveillance throughout the autumn.

Civil preparedness was added to the growing integration of air and naval forces. Poland and Lithuania are preparing a joint plan to evacuate civilians from the Baltic states into Poland during a major crisis or military threat. Exercise Vydo Skliautas 2026, held from 25 September to 3 October, tested warning, registration, transport, and cross border procedures. The Suwałki corridor emerged as the main logistics route in the plan.

Joint Defence Across the Baltic and Nordic Region

Airspace Incidents and Grey Zone Pressure

A Russian Mi 8 military helicopter entered Polish airspace from the direction of Kaliningrad on 23 September. Euronews and AP reported that it remained inside Poland for about 42 seconds and travelled roughly 300 metres across the border. Poland scrambled fighter aircraft. The incident showed that even brief incursions can trigger a rapid military response in the Baltic region.

A similar risk pattern continued in Romania. During Russian attacks on targets in Ukraine on the night of 2 October, an object fell in the Tulcea area. A fire broke out near the village of Plauru. Romania's Defence Ministry opened an investigation. No deaths or major damage were reported.

These incidents do not amount to open conflict on their own. They do shorten response times and increase the risk of miscalculation. Air defence along the Baltic and Black Sea frontiers is no longer seen as a purely national task. NATO's shared air picture and rapid decision making mechanisms are becoming more important.

Russia's Northern Fleet tested a new maritime passage on 30 September. Four vessels sailed through the Shokalsky Strait in Severnaya Zemlya. The Barents Observer reported that this was the first passage by Russian military ships through the strait. Russia described the voyage as a navigation safety and rescue exercise. The route also adds operational flexibility on the Northern Sea Route.

The link between northern ports and Russia's external military supply networks also drew attention. The Barents Observer reported on 29 September that some Russian cargo vessels active in Arctic ports had appeared in shipments linked to North Korea. The report said some of the ships had previously taken on suspected ammunition cargoes at Rason. These assessments are based on vessel tracking and open source data. The cargo carried on individual voyages has not always been independently verified.

Moscow also hardened its nuclear rhetoric over Kaliningrad. The Russian Embassy in London said on 29 September that any NATO blockade would be met with all available means. The statement explicitly referred to the nuclear option. This does not prove that a blockade plan exists. It does show that the Baltic security debate is moving into the language of nuclear deterrence.

Russian Military and Logistics Activity in the North

DIPLOMACY

United States, Denmark, and Greenland

Diplomatically, the 22 September agreement shifted months of debate over ownership and sovereignty into an institutional security negotiation. Copenhagen and Nuuk presented the text as a compromise that protects sovereignty and self determination. Washington highlighted the wider defence access as a strategic gain.

The fact that the parties attach different political meanings to the same text shows that the issue is not closed. The next phase is likely to focus less on Greenland's formal status. Attention will instead move to

decision making in the new defence areas, investment screening, and the rules for third party access.

Denmark presented the framework at the United Nations as a shared gain. Denmark's Permanent Representative to the UN, Christina Lassen, said on 28 September that the agreement strengthened security for Greenland, Denmark, the United States, NATO, and Europe. The Kremlin took a more distant position. Dmitry Peskov described the agreement as a matter for the parties and said US Russian Arctic co-operation was not on the agenda.



Arctic Partnership Between Norway and Canada

Norwegian Prime Minister Jonas Gahr Støre met Canadian Prime Minister Mark Carney in Ottawa on 20 September. The two governments agreed to prepare a new arrangement for closer defence co-operation. According to the Norwegian statement, the parties want more training and joint operations in the Arctic.

The partnership also covers energy, critical minerals, space, artificial intelligence, climate, and economic security. Canada's move towards a common submarine platform with Germany and Norway strengthens the military basis of this cooperation. Using the same submarine type would improve interoperability in northern waters.

Norway's Ministry of Justice and Public Security adopted a special regulation for Svalbard on 19 September. It makes it harder to seize assets needed to operate settlements and maintain essential supplies. The decision is especially relevant to Russian assets serving Barentsburg.

The regulation came soon after an attempt to enforce Naftogaz's arbitration award against Russia through Russian assets in Svalbard. Norwegian officials said the main reasons were supply security and predictability. Oslo did not withdraw sanctions or enforcement law. It added a specific layer of protection for the operation of settlements in Svalbard.

The decision shows how Svalbard's special legal regime may be adjusted under geopolitical pressure. Norway is trying to preserve its sovereignty and national law. At the same time, it wants to protect basic supplies for the Russian civilian presence on the islands. This balance may be tested again in future court cases.

Law and Supply Security in Svalbard



Arctic Governance and Indigenous Representation

Greenlandic politician and Inuit leader Sara Olsvig was appointed Senior Emissary for the Central Arctic Ocean on 24 September. Arctic Circle said the role is intended to support high level dialogue on the future of the central Arctic Ocean. Science, the environment, law, security, the economy, and Indigenous perspectives will be addressed on the same platform.

The appointment shows that governance channels have not disappeared despite growing military competition. The choice of a Greenlandic figure is also significant. Local and Indigenous actors are increasingly seeking a role in setting the Arctic agenda rather than serving only as consulted stakeholders.

The United Kingdom announced a new sanctions package against Russia on 1 October. Reuters reported that it covered 23 individuals and entities and eight vessels. The list included three shadow fleet ships, two bunkering vessels, and three Russian ice class vessels. The choice of targets shows a more direct focus on northern logistics.

Estonia also banned the transit of Russian and Belarusian grain through its territory on the same day. Reuters reported that Russian companies had adapted terminals at Baltic and Arctic ports for grain exports because of disruption in the Black Sea. Restrictions on Baltic transit could therefore place more pressure on Russia's northern ports.

Sanctions Diplomacy and Northern Logistics



ENERGY

The EU Position on Arctic Hydrocarbons and Pressure from Norway

The European Union is maintaining its policy against new Arctic oil and gas fields. Reuters reported on 21 September that the European Commission did not plan to reverse its 2021 position. That policy opposes the development of new fields and calls for hydrocarbons from those fields not to be purchased.

Norway wants the approach to change. Oslo argues that new production in the Barents Sea could support European energy security. Norway is already Europe's largest gas supplier. Output is expected to decline in the 2030s as existing fields mature. Oslo therefore sees new exploration areas as a strategic reserve.

The EU is expected to publish its new Arctic policy on 20 October. The central question will be how it balances environmental goals with energy security. The source material indicates that Brussels is not yet ready to change its current moratorium line.

Rosneft's Vostok Oil project began commercial exports on 24 September. Reuters reported that crude oil was being loaded onto ice class tankers at the new Bukhta Sever terminal. Average exports in 2026 are expected to be around 150,000 barrels a day. Initial volumes remain well below the project's long term targets.

Rosneft aims to raise production to around 600,000 barrels a day in the second half of 2027. Its 2030 target is 1 million barrels a day. Around 250,000 tonnes of oil were loaded onto three tankers in September. One vessel headed to Asia through the Northern Sea Route. The others sailed west for transshipment around Murmansk.

The strategic value of Vostok Oil is not based on reserve size alone. Bukhta Sever gives Russia a new export outlet operating directly from the Arctic coast. This could reduce dependence on Baltic and Black Sea infrastructure. Financing, ice class shipping, and technology constraints will still shape the pace of growth.

Vostok Oil Begins Commercial Exports

Traffic Rises on the Northern Sea Route

More than 50 vessels were in the eastern section of the Northern Sea Route on 24 September. Barents Observer data showed that more than 30 were tankers. Heavy lift ships, container vessels, and military platforms were also operating on the same route. The concentration shows that commercial and military use are growing at the same time.

Russia aims to raise cargo volumes on the route to 109.7 million tonnes by the end of 2030. The target for 2035 is 151.6 million tonnes. Similar targets have been missed in the past, so these figures should not be treated as guaranteed capacity. Even so, Vostok Oil and eastbound LNG flows provide concrete sources of additional tanker traffic over the medium term.

Less sea ice does not automatically make navigation easier. Thinner ice can create more mobile and fragmented conditions. Icebreaker support, search and rescue infrastructure, insurance, and real time ice monitoring therefore remain critical. The strategic value of these services will rise as traffic grows.

A High North News analysis published on 21 September said new US sanctions legislation could increase pressure on Yamal LNG. The law provides for scrutiny of actors with control or a majority stake in Yamal LNG under certain conditions. Novatek owns 60 per cent of the project.

The scope of legal enforcement is not yet fully clear. There are different interpretations of when the president would be required to impose sanctions. Even so, the legislation could create commercial risk before the European Union's own timetable for Russian LNG restrictions takes effect. Shipowners, insurers, terminals, and buyers could all be affected.

The United Kingdom's maritime sanctions announced during the same period add to the pressure created by the US measure. The main risk lies in the transport chain rather than production itself. Limits on ice class vessels, bunkering, insurance, and port services could raise costs and increase operational uncertainty.

Yamal LNG and New US Sanctions Risk

SECURITY

The Asian Dimension: Alaska LNG and a New Maritime Partnership

Japan, the United States, and South Korea were preparing a trilateral framework for Arctic maritime and energy cooperation as of 21 September. Splash247 reported that the draft covered sea routes, icebreaker technology, maritime observation, and oil and gas transport. The initiative is intended to connect US allies in Asia more closely with northern corridors.

Alaska LNG presents a less certain picture. The Trump administration described South Korea's proposed 54 billion dollar investment plan as a major step forward. Seoul said on 1 October that no investment decision or final amount had been agreed. South Korea will first assess the project's commercial viability and legal conditions.

The gap shows the distance between political announcements and committed capital in Arctic energy projects. Alaska LNG requires a major pipeline and a liquefaction terminal. To secure financing, preliminary arrangements would need to become long term and binding purchase agreements.



Canada announced 85.5 million Canadian dollars in federal funding for Rankin Inlet Airport in Nunavut on 28 September. The investment covers upgrades to the runway, taxiways, and aprons. The government described the project in terms of both civilian connectivity and defence capacity.

Rankin Inlet clearly illustrates the new model of Arctic infrastructure policy. The same facility supports food and health supplies. It can also support military mobility and emergency response. Northern transport investment is therefore becoming a shared tool of economic development and sovereignty policy.

Northern Infrastructure and Dual Use Capacity

STRATEGIC SYNTHESIS

The first strategic conclusion from this period is that Arctic competition is increasingly measured by implementation capacity rather than political intent. Effective presence requires more than a military decision. It also depends on airports, ports, communications, maintenance, and logistics that can operate through winter conditions. The gap between geographic presence and real operational access is becoming clearer.

The second trend is a more technical understanding of sovereignty. Formal borders and legal status remain in place. Access to defence areas, foreign investment screening, and the operation of critical infrastructure are being tied to tighter security rules. This creates more room for external partners without requiring a transfer of sovereignty.

The third trend is that northern planning inside NATO is moving beyond geographic command boundaries. Gaps can emerge in early warning and maritime surveillance when North America, Europe, and the Pacific are treated as separate theatres. Information sharing and joint command arrangements are therefore becoming as important as increases in physical forces.

Deterrence across the Baltic and Nordic region is also taking on a broader meaning. Keeping military units ready is no longer seen as enough. Civilian evacuation, dual use airports, transport corridors, and border infrastructure are becoming part of crisis planning. Defence policy is moving closer to social and economic resilience.

For Russia, the value of the northern corridor comes from combining pro-

duction, transport, and military mobility along the same route. Ports and sea lanes are becoming shared instruments of state capacity rather than infrastructure for a single sector. This integration also increases dependence on bottlenecks such as ice class vessels, technology, maintenance, and finance.

Sanctions policy is also moving away from a product centred approach towards services and logistics. Targeting a producer or a cargo may not be enough to restrict energy flows. Insurance, vessel finance, bunkering, maintenance, and transshipment points may become more effective pressure tools.

There is no single strategic bloc on the Asian side. China is working more closely with Russia's northern energy and transport networks. Japan and South Korea are looking for alternative maritime and energy partnerships with the United States. Political alignment, however, does not guarantee that capital will flow into expensive Arctic projects.

This creates a more difficult balance for Arctic governance. Security planning is becoming harder, but cooperation is still needed in maritime safety, the environment, science, and Indigenous representation. Keeping competition manageable will depend on legal predictability and open technical communication channels as much as military deterrence.

CONCLUSION



Three thresholds should be watched in the next period. The first is how quickly the technical rules for the new defence arrangements become clear. The second is whether joint military and civilian preparedness in the north develops into permanent budgets and force structures. The third is how far winter conditions test the real capacity of energy and transport networks.

These thresholds will shape the pace of Arctic competition. In the near term, major changes in sovereignty are less likely than tighter rules over access rights and control of infrastructure.

The region's strategic weight will increasingly be measured by infrastructure that can operate throughout the year and by the legal and logistics networks that support it, rather than by distance on a map.



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