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REPORT

Russia at the Arctic Crossroads

Navigating the Melting Geostrategic
Landscape of the Northern Sea Route

December 2023

Benjamin Martin & Zsanett Greta Papp



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Executive Summary

The Arctic, a long-time peripheral geopolitical domain, is increasing rapidly in significance due to a compounding of climactic and geopolitical processes. Climate change has made swaths of the Arctic Ocean more accessible for longer periods each year, and the insatiable need for critical materials and energy is driving prospectors further and further North. It is under these conditions that Vladimir Putin's Russia has rapidly increased its allocation of resources to developing the country's northern border. This report focuses on the implications of the development of, and competition over, the Northern Sea Route (NSR), which runs from the Barents Sea in the West to the Bering Sea in the East. The report finds:

- Climate change is making the Arctic more accessible to international shipping and development.
- Under Vladimir Putin, Russia has an ambitious plan for the Route's development, seeking to both encourage international transit through and exert control over the NSR.
- Internationally, Putin is attempting to bend international law to claim jurisdiction over the extent of the Route.
- Domestically, Putin is investing heavily in Arctic infrastructure, including a fleet of icebreakers and Soviet-era air bases, which could make the NSR navigable year-round.
- Sanctions against Russian energy have only encouraged closer cooperation between Russia and its BRICS partners, especially China and India.
- The development of the NSR is a cornerstone of Vladimir Putin's plans for the future of the Russian economy and its broader geopolitical strategy.



Section I

A Region in Flux

On 14 August 2023, the liquid natural gas (LNG) carrier *Velikiy Novgorod*, belonging to Gazprom - the Russian majority state-owned multinational energy corporation - departed from a liquefaction plant near St. Petersburg, arriving in China in mid-September. What makes this journey exceptional is not *Velikiy Novgorod's* destination, nor the 170,200 cubic metres of LNG it carried, but rather that the month-long journey represented the first commercial shipment of LNG from outside the Arctic through the Northern Sea Route (NSR).¹ The *Velikiy Novgorod's* journey is indicative of a wider trend of increased maritime shipping in the Arctic that has far-reaching economic, geostrategic, and environmental consequences.

This report will explore the implications of the *Velikiy Novgorod's* journey concerning Russia's economic and military development of the NSR and discuss the Route's potential as a future International Transport Corridor (ITC), like the Suez and Panama Canals. The NSR has been the recipient of significant and continued economic and rhetorical focus from Vladimir Putin's government, especially in the wake of Russia's invasion of Ukraine. This report will also explore the geostrategic implications of the war in Ukraine and the subsequent Western sanctions on the development of the NSR. With ice melting at an alarming rate and the rapid militarization of the Arctic by both Russia and NATO, the NSR will undoubtedly be the focus of significant clashes in the coming years.

The Arctic is undergoing a series of significant and irreversible changes. Unprecedented climate change is driving Arctic Sea ice levels lower as ice melts earlier in the Spring and returns later in the Fall. Sea ice has been declining by roughly 12 per cent per decade since the 1980s,² revealing new routes through the region that are accessible to non-icebreaking ships for longer periods each year. The melting of permafrost poses a threat to existing Arctic infrastructure, as buildings, pipelines, and airstrips sink into previously solid ground.³ Sea level rise and erosion, more frequent and severe wildfires, and crashing biodiversity are risks that Arctic nations and the region's four million inhabitants will have to contend with in

¹ Malte Humpert. "Gazprom Send First-Ever Shipment of Baltic LNG to China via the Arctic," *High North News*, September 1, 2023, www.highnorthnews.com/en/gazprom-sends-first-ever-shipment-baltic-lng-china-arctic

² National Snow & Ice Data Center, "The long Arctic winter sets in," November 2, 2023. Accessed October 31, 2023. <https://nsidc.org/arcticseaicenews/>.

³ World Wildlife Fund, "Climate Change," Accessed October 31, 2023, www.arcticwwf.org/threats/climate-change



the coming years. This heightened exposure to the impact of human-driven climate change adds to the existing struggles of Arctic residents, who already face magnified health concerns, including high suicide rates, poor infrastructure, and limited access to medical care.⁴

New economic and strategic possibilities in the region further complicate efforts to support Arctic communities and environments. Efforts to encourage the sustainable development of the Arctic vary greatly in their focus between different Arctic countries.⁵ Some countries, like Canada⁶ and Norway,⁷ are focused more heavily on exploiting newly discovered and accessible natural resources, while others, like Russia⁸ and the United States (US),⁹ have prioritised strategic concerns and military build-up.

Arctic states largely disagree over contested legal questions in the Arctic, most prominently the exploitation of common pool resources, and the demarcation of Exclusive Economic Zones (EEZ). For example, Canada is the only Arctic state that recognises Russia's claimed jurisdiction over the NSR, and Russia is the only Arctic state that recognises Canada's jurisdiction over the Northwest Passage.¹⁰ The unpredictable changes and increased access to the Arctic have led to a more volatile, contested, and vulnerable geopolitical reality for the region. Many non-Arctic states are looking to take advantage of the changes in the region in what has been described by some as a "scramble" for resources, reminiscent of the 19th century "scramble for Africa."¹¹ As the Arctic Institute remarks: "Arctic security in the 21st Century is defined by Arctic and non-Arctic actors."¹² Truly, the traditional "high-north, low-

⁴ Arctic Council, "Arctic Peoples," Accessed October 31, 2023, <https://arctic-council.org/explore/topics/arctic-peoples>

⁵ Coby Nguyen, "What's Next for Sustainable Development?" *The Arctic Institute*, April 20, 2021.

www.thearcticinstitute.org/whats-next-sustainable-development

⁶ Government of Canada, "Arctic and Northern Policy Framework," www.rcaanc-cirnac.gc.ca/eng/1560523306861/1560523330587

⁷ Government of Norway, "The Norwegian Government's Arctic Policy," www.regjeringen.no/en/dokumenter/arctic_policy/id2830120

⁸ Eugene Rumer, Richard Sokolsky, and Paul Stronski, "Russia in the Arctic a Critical Examination," *Carnegie Endowment for International Peace*, (March 29, 2021), <https://carnegieendowment.org/2021/03/29/russia-in-arctic-critical-examination-pub-84181>

⁹ White House, "FACT SHEET: The United States' National Strategy for the Arctic Region," October 07, 2022, www.whitehouse.gov/briefing-room/statements-releases/2022/10/07/fact-sheet-the-united-states-national-strategy-for-the-arctic-region

¹⁰ Gabriella Griecus, "Geopolitical Implications of New Arctic Shipping Lanes," *The Arctic Institute*, March 18, 2021, www.thearcticinstitute.org/geopolitical-implications-arctic-shipping-lanes

¹¹ Jon D. Carlson, et al., "Scramble for the Arctic," *The SAIS Review of International Affairs* 33, no. 2 (2013): 21-43, www.jstor.org/stable/26995398

¹² The Arctic Institute, "Country Backgrounders," accessed October 31, 2023, www.thearcticinstitute.org/country-backgrounders



tension” paradigm in the Arctic has been supplanted by a fast-paced, high-tension paradigm.¹³

International governance efforts in the Arctic have thus far been unable to prevent these escalating tensions. The primary soft-power governance institution in the region, the Arctic Council, has an explicitly apolitical mandate, focused on scientific collaboration, sustainable development, and environmental protection. The Council’s operations ceased after the 2022 invasion of Ukraine, when the other seven Arctic countries, The US, Canada, Iceland, Norway, Denmark, Sweden, and Finland, refused to cooperate with Russia.¹⁴ Collaboration has since partially resumed, but strictly on scientific matters, which is unlikely to lower broader and more persistent tensions.¹⁵

In response to the new high-tension status-quo, the Arctic is facing a general militarization. In an effort to secure new resources, ITCs, and strategic locations, the North Atlantic Treaty Organisation (NATO) and Russia have engaged in a rapid increase of security capabilities in the region. NATO, citing Russian and Chinese interest and military investment in the region, have pledged to continue increasing their presence in the High North by establishing a new NATO Arctic Command and investing in their own Arctic-friendly air and maritime capabilities.¹⁶ From March to April of 2022, 30,000 NATO allied and partner troops from 27 countries carried out the large-scale Exercise Cold Response, demonstrating their commitment to increasing their presence and capabilities in the region.¹⁷

Vladimir Putin, President of Russia, has made it clear that the Arctic is a major strategic priority for his regime and has subsequently invested heavily in infrastructure.¹⁸ Putin is aware that Russia’s (approximate) 45 per cent share of the Arctic provides it with significant leverage in the region.¹⁹ His regime will likely continue to use this leverage to achieve Russia’s strategic objectives in the Arctic. In recent years, Russia has opened several new military bases and re-established many older Soviet installations along its twenty-thousand-kilometre-long Arctic

¹³ NATO, “The Future of the High North,” May 12, 2023, www.act.nato.int/article/the-future-of-the-high-north

¹⁴ Arctic Council, “Q&A With Morten Høglund, the New Chair of the Senior Arctic Officials,” May 15, 2023, <https://arctic-council.org/news/q-a-with-morten-hoglund-chair-of-the-senior-arctic-officials>

¹⁵ Astri Edvardsen, “Light at the End of the Tunnel for the Arctic Council,” *High North News*, September 12, 2023, www.highnorthnews.com/en/light-end-tunnel-arctic-council

¹⁶ NATO, “NATO is stepping up in the High North to keep our people safe,” August 25, 2023, www.nato.int/cps/en/natohq/opinions_206894.htm

¹⁷ NATO, “Exercise Cold Response 2022 – NATO and partner forces face the freeze in Norway,” March 7, 2022, https://www.nato.int/cps/en/natohq/news_192351.htm

¹⁸ Jacob Gronholt-Pedersen, Gwladis Fouche, “Insight: NATO wake up to Russian supremacy in the Arctic,” *Reuters*, November 16, 2022, www.reuters.com/world/europe/nato-allies-wake-up-russian-supremacy-arctic-2022-11-16

¹⁹ Brett Simpson, “The Rise and Sudden Fall of the Arctic Council,” *Foreign Policy*, May 31, 2023, <https://foreignpolicy.com/2023/05/31/arctic-council-russia-norway>



border, and since the early 2000s, Russian engineers have expanded military infrastructure on the strategically important Kola Peninsula, essential to Russia's nuclear deterrence and the home of the Russian Northern Fleet.²⁰ New and refurbished air bases, state-of-the-art missile defence systems, and specialised Arctic brigades all enable Russia to project power into the Arctic and to assert its claim over the NSR.²¹ Russia has even introduced the world's first floating nuclear reactor, the *Akademik Lomonosov*, which is currently powering the remote Arctic mining town of Pevek. The vessel is just the first of a planned small fleet of mobile nuclear reactors that Putin hopes will power Russia's development of the region.²²

The most important infrastructure improvement made by Russia in the Arctic in the last few years has been the development of the world's largest nuclear and non-nuclear icebreaker fleet, which will soon reach 50 ships in strength.²³ By comparison, the US's icebreaker fleet comprises a total of two ships. While these ships further support Russian military presence over the region, they are instrumental to the feasibility of the NSR as an ITC that could provide European and East Asian shipping companies with a route that is approximately two weeks shorter than transiting the Suez Canal. These ships, especially the newer, more powerful *Arktika*-class ships under development, could keep the NSR navigable year-round.²⁴ Despite the substantial changes in the region and the increased focus of the Arctic powers on the feasibility of the NSR as a trade route, it nevertheless remains ill-defined and unestablished, a victim of changing geopolitical circumstances that have drawn attention elsewhere.

²⁰ Mathieu Boulègue, "Russia's military posture in the Arctic," *Chatham House, London* 49 (2019).

²¹ Stefan Hedlund, "The Arctic in Russia's crosshairs," *Geopolitical Intelligence Services*, April 17, 2023, www.gisreportsonline.com/r/the-arctic

²² Nastassia Astrasheuskaya, "Floating nuclear power plant fuels Russia's Arctic ambitions," *Financial Times*, December 1, 2021, <https://www.ft.com/content/f5d25126-94fc-41fc-bc35-341df0560f4d>.

²³ Heather A. Conley, Matthew Melino, Jon B. Alterman, "The Ice Curtain: Russia's Arctic Military Presence," *CSIS*, March 26, 2020, www.csis.org/analysis/ice-curtain-russias-arctic-military-presence

²⁴ Lawson Brigham, "World's Most Capable Icebreakers: Russia's New Arktika Class," *U.S. Naval Institute*, May 2022, www.usni.org/magazines/proceedings/2022/may/worlds-most-capable-icebreakers-russias-new-arktika-class



Section II

Implications of the Ukraine War on the NSR

The development of the NSR has been on the Russian political agenda for some time, but under Putin's leadership, it has gained renewed prominence, becoming a central component of Russian Arctic policy. Indeed, the proposed 2024-2026 Russian budget outlines the government's plans to significantly increase funding for Arctic development.²⁵ The NSR has long served national security and domestic economic purposes. The Soviet Union, and now Russia, has a long history of natural resource exploration and exploitation, constructing military infrastructure - such as airfields and radar bases - and promoting domestic trade along the length of its Arctic maritime border.

Despite its decline in importance between the fall of the USSR and the rise of Putin, the early 2000s marked the beginning of the modern era of Russia's Arctic policy, focusing on revitalising the NSR and asserting control over Arctic territories. In 2008, Russia submitted a claim to the United Nations under the United Nations Convention on the Law of the Sea (UNCLOS) to extend its Arctic borders to the limits of its continental shelf, which included areas along the NSR.²⁶ This was a significant step in Russia's efforts to solidify its claim of sovereignty over the Arctic, and by extension, parts of the NSR. Consequently, Russia formally introduced legislation in 2018,²⁷ declaring the NSR a national transport route, strengthening its control over the passage and requiring foreign vessels to notify Russian authorities and request permission to transit.²⁸

Russia's invasion of Ukraine has seriously compromised its national security and economic development, especially along its borders with Europe. As such, the NSR has become a key element not only of Russia's national military strategy but also its economic and diplomatic

²⁵ The State Duma, "The Committee for the Development of the Far East and Arctic supported the draft federal budget for 2024-2026," Federal Assembly of the Russian Federation, December 10, 2023, <http://duma.gov.ru/news/58056/>

²⁶ Scott G. Borgerson, "Arctic Meltdown: The Economic and Security Implications of Global Warming," March 2, 2008, *Foreign Affairs*, 2008, <https://www.foreignaffairs.com/articles/arctic-antarctic/2008-03-02/arctic-meltdown>

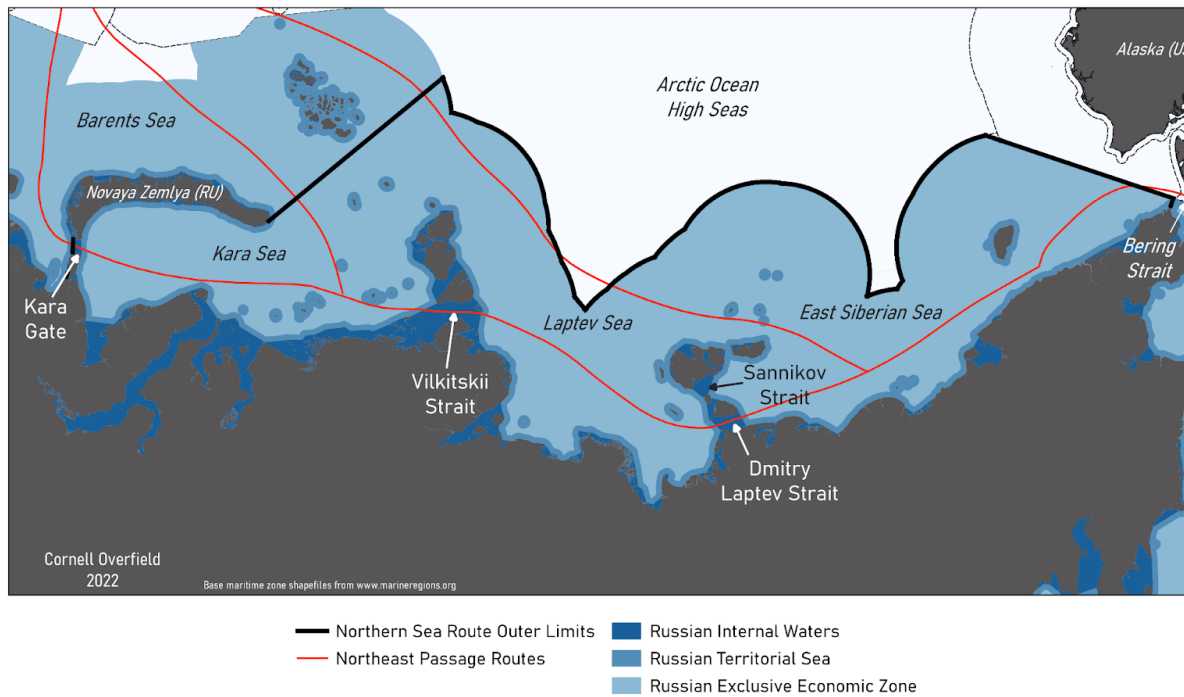
²⁷ Andrey Todorov, "New Russia Law on Northern Sea Route Navigation: Gathering Arctic Storm or Tempest in a Teapot?" *Belfer Center*, March 9, 2023, www.belfercenter.org/publication/new-russian-law-northern-sea-route-navigation-gathering-arctic-storm-or-tempest-teapot

²⁸ Cornell Overfield, "Wrangling Warships: Russia's Proposed Law on Northern Sea Route Navigation," *Lawfare*, October 17, 2022, www.lawfaremedia.org/article/wrangling-warships-russias-proposed-law-northern-sea-route-navigation

strategies. As an emerging focus of global discussions about critical materials, energy exploration, and international trade, the NSR is one of the few bright spots in Russia's current geopolitical outlook.

Figure 1

The Northern Sea Route area in the context of Russia's Arctic maritime zones.



Data Source: Lawfare²⁹

Moscow claims that the NSR is under its national jurisdiction.³⁰ By asserting its sovereignty over Arctic waters within its jurisdiction, Russia could “legally” regulate all shipping transiting through the NSR. This would have direct consequences on international trade, as foreign ships would need to receive permission to transit Russian waters on every passage, which would surely lead to tensions with unfriendly transiting nations.³¹

Russia has followed up on its international claims of jurisdiction over the NSR with domestic policies like the 2019 “Northern Sea Route Infrastructure Development Plan to 2035.” The

²⁹ Cornell Overfield, “Wrangling Warships: Russia’s Proposed Law on Northern Sea Route Navigation”, *LawFair*, October 17, 2022, www.lawfaremedia.org/article/wrangling-warships-russias-proposed-law-northern-sea-route-navigation

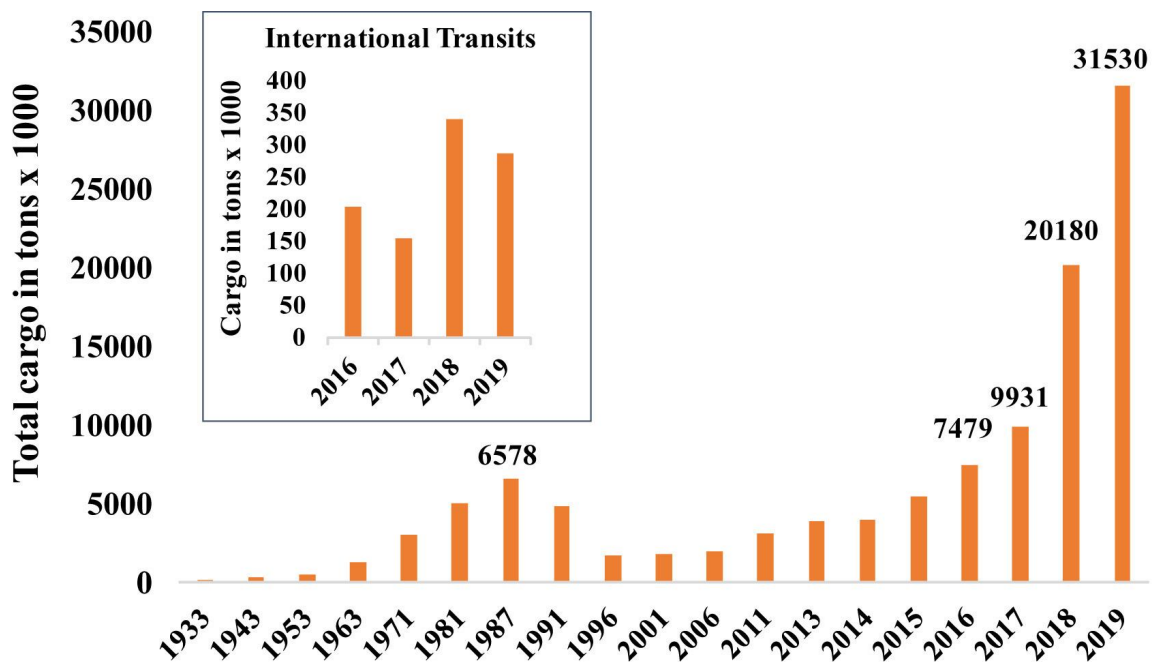
³⁰ Jan Jakub Solski, “The Genesis of Article 234 of the UNCLOS,” *Ocean Development & International Law* 52, no. 1 (2021): 1-19, DOI: 10.1080/00908320.2020.1835026.

³¹ Björn Gunnarsson, “Recent ship traffic and developing shipping trends on the Northern Sea Route - Policy implications for future arctic shipping,” *Marine Policy* 124 (2021): 104369, <https://doi.org/10.1016/j.marpol.2020.104369>

Ukrainian war commenced in the middle of the “first stage” of the plan (2019–2024), which focuses on fostering developments in the western section of the NSR. The primary objective of the plan is to increase the cargo flows through the NSR from roughly 35 million tons to 80 million tons by 2024, which is consistent with claims made in 2018 by President Putin.³² The second stage (2025-2030) concerns infrastructure development of year-round navigation through the Eastern part of the NSR to the Russian Far East and Northeast Asia. The third and final stage (2030-2035) aims to further increase cargo transport through the NSR to 200 million tons by 2031 and create a competitive national and international transport corridor via the NSR.

Figure 2

Cargo tonnage transported on the NSR between 1933 and 2019.



Data Source: Marine Policy³³

³² Charles Digges, “Putin decrees an increase in Arctic traffic,” Bellona.org, Maty 16, 2018.

<https://bellona.org/news/arctic/russian-nuclear-icebreakers-fleet/2018-05-putin-decrees-an-increase-in-arctic-traffic>.

³³ Björn Gunnarsson, “Recent ship traffic and developing shipping trends on the Northern Sea Route—Policy implications for future arctic shipping,” *Marine Policy* 124 (2021): 104369, <https://doi.org/10.1016/j.marpol.2020.104369>

The NSR is also an integral component of Russia's "North-South Corridor" concept, which seeks to create a more efficient maritime transportation route between Europe and Asia.³⁴ In response to Russia's invasion of Ukraine, Western sanctions on Russian energy exports have imbued a strong sense of urgency in Russia concerning the development of its Arctic infrastructure, to which the NSR is central. Subsequently, Russia hopes the Arctic will serve as a key gateway for:

- 1) An "alternative global route" in practice between Europe and Asia, "through" Russia, and;
- 2) The exploration of natural resources and implementation of development policies in the Siberian Arctic.

In a broader context, Russia's increased utilisation of the NSR should not be directly attributed to the Ukrainian war; Putin initiated preparations for the NSR's interconnective role and development years before the 2014 annexation of Crimea. Nevertheless, the Ukrainian invasion has proved to be taxing on the Russian economy and demand for new and improved sources of revenue is driving the Kremlin to accelerate its development of the NSR.³⁵

Similarly, the NSR has taken on a new importance in Russia's grand strategy in the wake of the Ukrainian invasion. Consequently, Russia is actively developing legislation to regulate the use of the NSR by foreign commercial and military vessels.³⁶ The question remains whether Russia can establish a legislative framework for international NSR usage without entangling the dysfunctional Arctic Council or other Western-dominated governing bodies.

Moscow, therefore, faces a dilemma in its development of the NSR. On one hand, the Kremlin wants to capitalise on its proximity to the NSR by attempting to exert military control over the entire route. In Putin's eyes, the Route is critical to Russian national security, and its future role in the new "high tension" Arctic. On the other hand, Moscow would like to encourage the flow of trade and capital through the NSR, which would bring with it substantial benefits to its local and national economies and industries.³⁷

³⁴ Björn Gunnarsson, Frédéric Lasserre, "Supply Chain Control and Strategies to Reduce Operational Risk in Russian Extractive Industries Along the Northern Sea Route," *Arctic Review on Law and Politics* 14 (2023): 21-45, <https://arcticreview.no/index.php/arctic/article/view/4052/8226>

³⁵ Reuters, "Kremlin urges faster action to let foreign vessels use Northern Sea Route," June 15, 2023,

<https://www.reuters.com/world/kremlin-urges-faster-action-let-foreign-vessels-use-northern-sea-route-2023-06-15/>.

³⁶ Reuters, "Kremlin urges faster action," June 15, 2023.

³⁷ Vasilii Erokhin, et al. "The Northern Sea Route Development: The Russian Perspective." *Arctic Maritime Logistics: The Potentials and Challenges of the Northern Sea Route*. Cham: Springer International Publishing, 2022. 283-303.



With the ongoing war in Ukraine, the international sanctions placed on Russia, and Europe seeking to decouple energy and economic activities, Russia is increasingly reliant on the Arctic region. Geopolitically it has brought China and Russia closer together, encouraging both states to develop more icebreakers; a necessary tool to navigate the region.³⁸ In addition, Russia seeks to implement a mutually beneficial energy partnership with India, with India considering a large-scale energy transition from coal to cleaner natural gas and, therefore, has started to import large quantities of natural gas and oil from Russia.

The war in Ukraine has contributed to the overall complexity surrounding the NSR. It has encouraged a more national security-oriented approach to its development, particularly as Russia seeks to develop the capability to exert control over the route. This quest for control is largely in response to Western sanctions, increased deployment of NATO forces to the Arctic, and contested legal interpretations of sovereignty. Russia has already sought to reinforce its control over the route, heightening tensions with Western countries, and raising questions about the legal status of its NSR claims, and its potential as a valuable trade and energy transport corridor. Putin intends to exploit the connectivity of the NSR to its full potential: Russia's proximity to the route makes Russia an unavoidable international trade and energy power. Harnessing the NSR's access as a political tool is therefore also an attempt by Russia to re-establish its connections with Europe, at least through international commerce and the developing transportation route provided by the NSR.

³⁸ Gabriella Gricius, "Geopolitical Implications of New Arctic Shipping Lanes", The Arctic Institute, March 18, 2021, www.thearcticinstitute.org/geopolitical-implications-arctic-shipping-lanes

Section III

LNG Export and Sanctions

While Europe initiated an (almost) immediate decoupling from Russian energy by imposing substantial economic and diplomatic sanctions on Russia in the wake of its aggression towards Ukraine, they left it with little choice but to diversify its energy market, driving it towards other energy-hungry countries from Asia and the Gulf. Intending to end the use of Russian fossil fuels by 2027, European countries have started to shift their energy policies and focus. The EU's fifth sanction package against Russia passed in April 2022, included broad prohibitions for the transfer of technology related to LNG, including the "supply, transfer, or export, directly or indirectly, goods and technologies suited for use in the [...] liquefaction of natural gas."³⁹

As an alternative energy supply chain with the ability to replace Russian energy exports, LNG has subsequently become a strategic fuel source, focussing international attention upon big LNG-exporter countries like Norway, the US, and Qatar. These countries have received renewed attention in the wake of the full-scale invasion of Ukraine and the EU's green energy diversification process. As a direct consequence of the war, EU LNG imports from the US have more than doubled since the start of the full-scale invasion, making the US the largest LNG supplier to the EU, representing almost 50% of total imports in 2022.⁴⁰ While the EU plans to be completely independent of Russian natural gas imports by 2027, approaches to this objective have varied between member states. Countries like Spain, France, and Belgium continue to import large quantities of Russian LNG, while Germany has stopped receiving natural gas from Russia completely.⁴¹

After the invasion of Ukraine, the US, the United Kingdom, and Canada banned all imports of oil and gas from Russia. However, the EU was a significantly larger importer of Russian energy, thus its sanctions were designed to have a greater impact on the Russian energy sector. Russia, however, appeared more prepared to absorb the impact of the sanctions than

³⁹ European Commission, "Ukraine: EU agrees fifth package of restrictive measures against Russia", April 8, 2022, https://ec.europa.eu/commission/presscorner/detail/en/ip_22_2332

⁴⁰ European Council, "Infographic - Liquefied natural gas infrastructure in the EU", September 20, 2022, <https://www.consilium.europa.eu/en/infographics/lng-infrastructure-in-the-eu/>

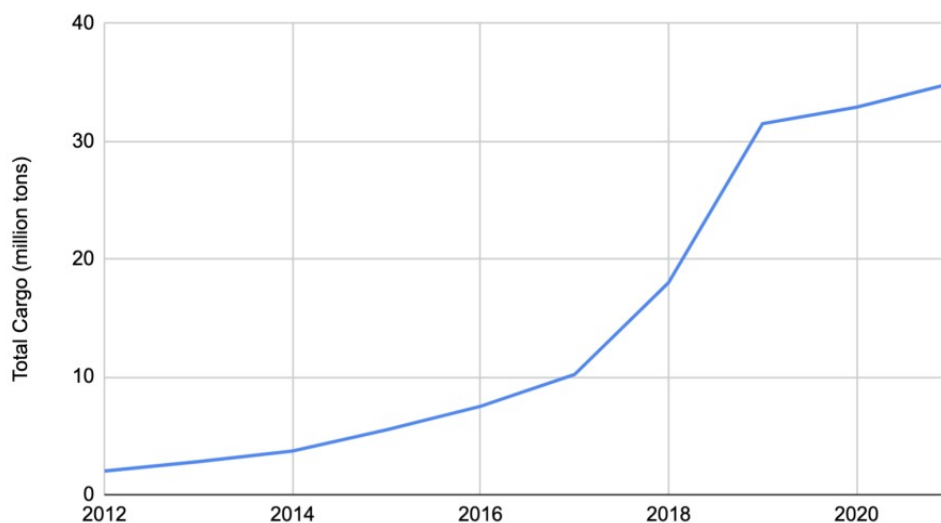
⁴¹ Carole Nakhle, "Europe and Russia without Nord Stream," *Geopolitical Intelligence Services*, December 23, 2022, <https://www.gisreportsonline.com/r/russia-without-nord-stream/>

Western companies. Prior to the sanctions, Belgium and Spain were the primary recipients of LNG from the Russian Arctic, with additional voyages also destined for France,⁴² generating approximately EUR 300 million per month for Russia. Moreover, in contrast to gas deliveries via pipeline, which have been curbed by 80 per cent following EU sanctions, LNG imports into the bloc have increased by more than 50 per cent since the beginning of the Ukraine war.⁴³

The EU has started to develop its own LNG infrastructure in a bid to reduce its dependency on the Russian gas supply chain, importing gas from the same suppliers through a more expensive liquefied method. Furthermore, and in contrast to widespread reporting stating that from 2022 international companies would no longer do business with Russia, or transport key prefabricated modules for Novatek's Arctic LNG 2 from China to Russia, Russia's diversification process also continues its rapid development, as well as broader efforts to increase deliveries via the NSR.⁴⁴

Figure 3

NSR Total Cargo 2012 - 2021



Data Source: High North News⁴⁵

⁴² Malte Humpert, "Transport of LNG Modules to Russia Continues, Calling Effectiveness of EU Sanctions Into Question," *High North News*, September 11, 2023, www.highnorthnews.com/en/transport-lng-modules-russia-continues-calling-effectiveness-eu-sanctions-question

⁴³ Malte Humpert, "EU Proposes Measures to Block Import of Russian Arctic LNG," *High North New*, April 3, 2023, www.highnorthnews.com/en/eu-proposes-measures-block-import-russian-arctic-lng

⁴⁴ Malte Humpert, "Cargo Volume on Northern Sea Route Reaches 35m Tons, Record Number of Transits", *High North News*, September 13, 2023, www.highnorthnews.com/en/cargo-volume-northern-sea-route-reaches-35m-tons-record-number-transits

⁴⁵ Humpert, "Cargo Volume on Northern Sea Route." September 13, 2023.



The Russian diversification process has shifted Moscow away from the Mediterranean and Western Europe and towards Asia and the Persian Gulf.⁴⁶ In this new geoeconomic reality, using the Suez Canal and Malacca Straits, both critical maritime choke points for international maritime trade, presents new sanctions-related risks.⁴⁷ Instead, Russia plans to transport LNG to China, and the rest of Asia through the NSR.

The sanctions, therefore, are likely to help increase the importance of LNG export terminals on the NSR, particularly as the preferred departure points for Russian Arctic commodities on their way to selective market destinations, particularly Asia.⁴⁸ The NRS is subsequently experiencing a rapid increase in LNG transit – in 2022, 34.9 million tons of cargo were transported along Russia’s NSR, surpassing 2021’s total by almost two million tons.⁴⁹

It is worth noting here three important realities about Russia’s Arctic energy market:

- 1) Roughly two-thirds of cargo transported through the NSR by volume is LNG and crude oil, with the remaining share coming from bulk shipping and general cargo;
- 2) Russia’s main energy partner remains China, and;⁵⁰
- 3) According to Rosatom, responsible for managing the world's only nuclear-propelled icebreaker fleet, and the principal agency responsible for Russian development of the NSR, cargo volume is expected to hit 80 million tons in 2024, and 110 million tons by 2030.

⁴⁶ Richard Connolly, “Russia’s Economic Pivot to Asia in a Shifting Regional Environment”, Royal United Services Institute (RUSI), September 16, 2021, <https://rusi.org/explore-our-research/publications/briefing-papers/russias-economic-pivot-asia-shifting-regional-environment>

⁴⁷ Richard Connolly, “Russia’s Economic Pivot to Asia in a Shifting Regional Environment”, Royal United Services Institute (RUSI), September 16, 2021, <https://rusi.org/explore-our-research/publications/briefing-papers/russias-economic-pivot-asia-shifting-regional-environment>

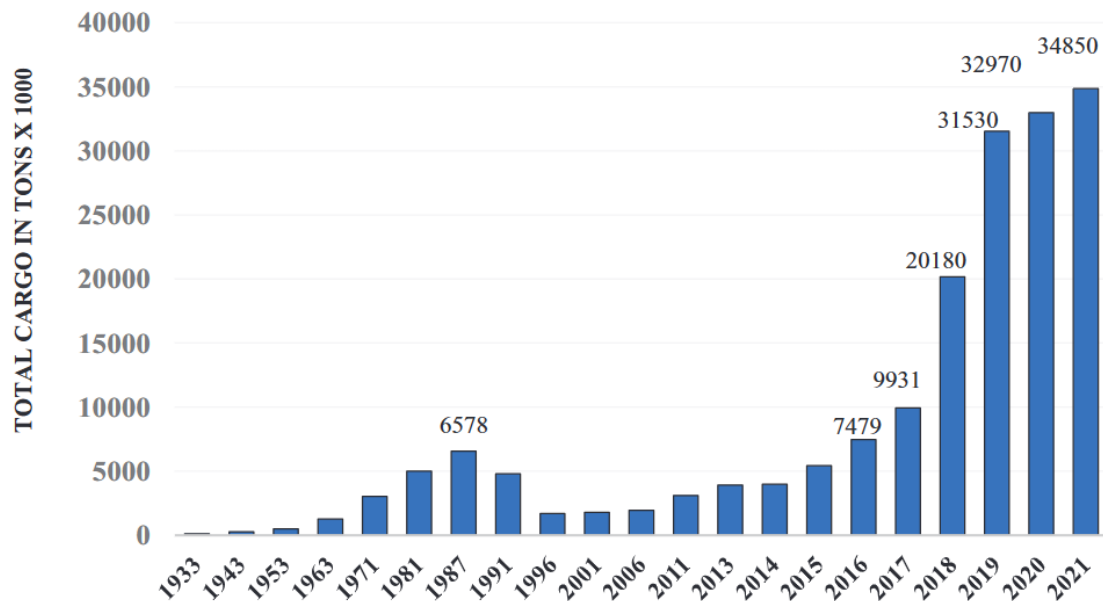
⁴⁸ Björn Gunnarsson, and Frédéric Lasserre. 2023. “Supply Chain Control and Strategies to Reduce Operational Risk in Russian Extractive Industries Along the Northern Sea Route,” *Arctic Review on Law and Politics* 14 (January): 21–45. <https://doi.org/10.23865/arctic.v14.4052>

⁴⁹ Malte Humpert, “Cargo Volume on Northern Sea Route Reaches 35m Tons, Record Number of Transits”, High North News, September 13, 2023, www.highnorthnews.com/en/cargo-volume-northern-sea-route-reaches-35m-tons-record-number-transits

⁵⁰ Reuters, “Russia aims to boost LNG sales, trade with China via NSR, Novak says, October 19, 2023, www.reuters.com/business/energy/russia-aims-boost-lng-sales-trade-with-china-via-nsr-novak-says-2023-10-19

Figure 4

Total cargo volumes transported on the NSR per year between 1933 and 2021



Data Source: North Sea Route Administration⁵¹

Furthermore, the whole northern territory of Russia could be connected through Russian ports along the NSR. The transit of the icebreaker tanker *Veliky Novgorod* from Gazprom's plant in the Baltic Sea to China is a prime example of this connectivity. Similarly, a Chinese shipping company, *New Shipping Line* also completed its first round-trip voyage through the NSR.⁵² Consequently, western and northern Russian ports have regained their strategic relevance.

The security of the new Shanghai – St. Petersburg economic maritime corridor through the NSR and Baltic Sea has been threatened by the accession of Sweden and Finland to NATO. The Baltic Sea is now a “NATO sea” (Baltic Sea with only NATO members), so Russian economic activities originating from St. Petersburg and Kaliningrad must pass through “enemy waters.” Russia has undertaken naval exercises in the Gulf of Finland following the invasion of Ukraine (including as a response to Sweden and Finland applying to join NATO), and its international maritime links to India (through the Suez Canal), and to China (through

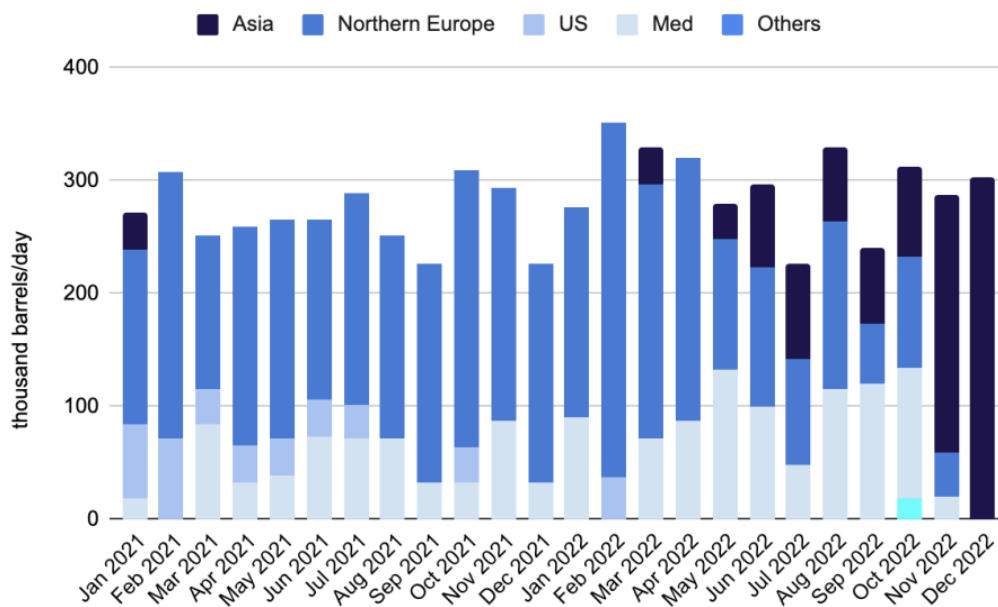
⁵¹ Björn Gunnarsson, and Frédéric Lasserre. 2023. “Supply Chain Control and Strategies to Reduce Operational Risk in Russian Extractive Industries Along the Northern Sea Route”. *Arctic Review on Law and Politics* 14 (January):21–45. <https://doi.org/10.23865/arctic.v14.4052>.

⁵² Malte Humpert, “Chinese Container Ship Completes First Round Trip Voyage Across Arctic”, *High North News*, October 9, 2023, www.highnorthnews.com/en/chinese-container-ship-completes-first-round-trip-voyage-across-arctic

the Malacca Strait), are heavily dependent on the St. Petersburg port, and thus access through the Baltic sea.⁵³ With sanctions on Russian energy exports and NATO extension in the Baltic Sea, Russia must look for mutually beneficial partnerships with alternative export routes. The NSR is an obvious alternative.

Figure 5

Total cargo volumes transported on the NSR per year between 1933 and 2021



Data Source: Arctic Today⁵⁴

Economic sanctions and political tensions with Western nations have forced Russia to seek economic diversification and strengthen its economic ties with previously underdeveloped partners, particularly those in the Indo-Pacific region. The NSR, which provides a shorter route for goods travelling between Asia and Europe, underpins this strategy. Russia has subsequently exhibited an eagerness to utilise the NSR as a route for exporting its reserves of oil and natural gas to alternative markets in Asia and Europe. Russia is seeking to diversify its maritime transportation routes and its energy customers to decrease its need to utilise Western transit hubs (such as Rotterdam). This diversification extends to the development of new technologies and routes (building icebreakers and developing the NSR), as well as enhancing and securing energy partnerships with new Asian and European countries.

⁵³ Vaishali Basu Sharma, "India Must Look to Russia for a Mutually Beneficial Energy Partnership", The Wire, October 12, 2021, <https://thewire.in/energy/india-must-look-to-russia-for-a-mutually-beneficial-energy-partnership>

⁵⁴ Humeyra Pamuk, Reuters, Tom Balmforth, "U.S. and Russian foreign ministers to meet in Iceland in bid to ease friction", Arctic Today, May 19, 2021, www.arctictoday.com/u-s-and-russian-foreign-ministers-to-meet-in-iceland-in-bid-to-ease-friction



Whilst Russia pivots its energy supplies, Western countries' transmission of LNG modules nevertheless continues to Russia, calling the effectiveness of Western sanctions into question. While ***“the EU cannot and will not go back to the status quo with Russia as our main gas supplier”*** (Kadri Simson, the EU's Energy Commissioner), EU companies continue to engage and remain involved in NSR business with Russia. Western stakeholders are continuing to invest in LNG projects, as the short-term fuel for the green transition provides a low-risk, incremental pathway for decarbonisation, which aligns with the core decarbonisation policy aims of the EU.⁵⁵

⁵⁵ SEA-LNG, “Delivering Decarbonisation,” April 2, 2023, https://sea-lng.org/wp-content/uploads/2023/01/2023_A-view-from-the-bridge_SINGLE-PAGES_APRIL-2023.pdf.

Section IV

China, India, and Geopolitics

At the BRICS summit in August of 2023, Putin reaffirmed Russia's aim to construct new ports, fuel terminals, and icebreaking vessels to ensure the navigability of the NSR year-round.⁵⁶ The potential of the NSR as a navigable international transport corridor (ITC) is by no means a fantasy: in September of 2023 Russian Minister for Arctic Development, Alexei Chekunkov, stated that roughly 35 million tons of cargo made its way through the NSR in 2022, and Russia hopes to increase that number to 200 million tons by 2031.⁵⁷ Chekunkov also notes that the primary obstacle to achieving this goal is the number of icebreakers available to guide cargo ships through treacherous icy waters. The solution, he argues, lies in partnerships with India and China.

The development of the NSR into a viable ITC has been a priority of China's *Belt and Road Initiative* (BRI) since the early 2010s. The Silk Road Fund and the China National Petroleum Company hold a combined 30 per cent share⁵⁸ of the Yamal LNG project, the largest LNG project in the Arctic, located in North Western Siberia.⁵⁹ Already, Russian crude oil and LNG are flowing to China on ice-capable ships like the *Velikiy Novgorod*, and even on non-ice-capable ships like *Gingo* which recently transited the NSR from Murmansk to Qingdao.⁶⁰ Whilst Russia continues to pursue its war in Ukraine, it will undoubtedly prioritise shifting LNG and crude oil transportation to China and East Asia via the NSR where its ships are decidedly out of range of Ukrainian drones and missiles, and will subsequently seek to further bolster Russian power projection across the High North. The pursuit of this "Arctic Silk Road" is a logical policy priority for Xi Jinping's government, which has defined China as a "near Arctic state" for years.

⁵⁶ Reuters, "Putin says BRICS works for 'global majority,'" August 22, 2023, www.reuters.com/world/putin-says-brics-works-global-majority-2023-08-22

⁵⁷ Reuters, "Russia lacks ice-class vessels to develop Arctic sea route, talks to China, India - RBC," September 6, 2023, www.reuters.com/world/russia-lacks-ice-class-vessels-develop-arctic-sea-route-talks-china-india-rbc-2023-09-06

⁵⁸ Nengye Liu, "China's New Silk Road and the Arctic," *The Diplomat*, May 20, 2017, <https://thediplomat.com/2017/05/chinas-new-silk-road-and-the-arctic>.

⁵⁹ Total Energies, "Yamal LNG," Accessed October 31, 2023, <https://totalenergies.com>.

⁶⁰ Malte Humpert, "Gazprom Send First-Ever Shipment of Baltic LNG to China via the Arctic," *High North News*, September 1, 2023, www.highnorthnews.com/en/gazprom-sends-first-ever-shipment-baltic-lng-china-arctic.



In India's case, meetings between Russian and Indian officials in March and August of 2023 have led to a mutual agreement to deepen cooperation in Arctic shipping. Sarbananda Sonowal, India's Minister of Ports, Shipping and Waterways stated in August that:

"India is keen to collaborate [on] a partnership regarding the development of the Northern Sea Route, recognising the potential it holds for enhanced connectivity and trade."⁶¹

Evidently, the expansion and development of the NSR is a key vector for Russian cooperation with both China and India, among other BRICS allies. As China continues to pursue its economic and strategic competition with the US across Asia and the developing world, closer ties to Russia and unmitigated access to the NSR are bound to pay dividends. The World Trade Organization has been paralyzed since Donald Trump's presidency, so indications that BRICS countries are willing and capable of building and maintaining a robust trading regime may prove increasingly appealing to countries in the Global South that are disaffected by the US' shambolically regulated trade regime.

Take the cases of Japan and South Korea. These long-entrenched US partners have depended heavily on Russian LNG imports in the past. Before the war in Ukraine, Japan imported roughly 4% of its LNG from Russia and maintains an investment in the Russian-led Arctic 2 project, which covers 3% of Japanese LNG imports, despite Western sanctions on Russia.⁶² Similarly, in 2022 Russian LNG accounted for 6% of South Korean imports. To maintain their energy security, both countries may need to rely increasingly on Russian- and Chinese-run LNG projects in the Arctic, posing complicated geostrategic questions for both of these American partners.

The development of the NSR into an easily transitable ITC will have serious consequences on international trade regimes and subsequently, geopolitics. The prospect of a more developed Russian Arctic is already bringing BRICS countries closer together, most notably Russia, China, and India. Simultaneously, the prospects of decreased costs and travel times to Europe may encourage traditional American allies like Japan and Korea to consider strengthening ties with Russia.

⁶¹ Malte Humpert, "India Looking to Cooperate with Russia on Development of Arctic Northern Sea Route," *High North News*, October 6, 2023, www.highnorthnews.com/en/india-looking-cooperate-russia-development-arctic-northern-sea-route.

⁶² Miho Uranaka, Yoshifumi Takemoto, "Japan says to ensure U.S. sanctions on Russia LNG project won't harm supplies," *Reuters*, November 7, 2023, <https://www.reuters.com/business/energy/japan-says-sanctions-russia-will-affect-lng-project-2023-11-07/>.



Section V

Implementation and Recommendations

The increased accessibility of the NSR as an ITC will undoubtedly continue to attract significant attention in the near future. As Russia prosecutes its war in Ukraine, it is likely to use every available lever at its disposal to support its economy and war effort. For its BRICS partners, most notably China and India, the recent transit of LNG from the Baltic to China through the NSR marks the beginning of a new era of international trade. Russia's ambition to project military power over the entirety of the NSR would allow it to dictate *who* and *what* is permitted to transit through this potentially lucrative route.

For European countries, watching this expansion of activity in the NSR will highlight the relative ineffectiveness of their sanctions on Russian energy. As Russia continues to divert energy through the Arctic to China, India, and other BRICS countries, the inadequacy of Western sanctions will become even more evident. Moreover, as Russia and China continue to demonstrate the increasing navigability of the NSR, European companies are bound to pressure their governments to facilitate and enable access to this emerging ITC. Until the legal uncertainties over jurisdiction and security concerns amidst the Ukraine war are resolved, however, European engagement with the NSR is unlikely to increase substantially, if at all.

The most likely scenario is an increasingly intense securitisation of the Arctic by both Russia and NATO. NATO has already started to invest more in its Arctic deterrence, substantially increasing its military presence in the Arctic, and investing in its Northern infrastructure. US Secretary of State Anthony Blinken recently accused Moscow of making "unlawful maritime claims" on the regulation of foreign vessels transiting the NSR and suggested that Washington and NATO's military investment in the Arctic should be regarded as a reflection of their concerns about Russian militarisation of the region, including its claims over the NSR.⁶³

On the other hand, European countries, especially Scandinavian northern European countries, will be eager to benefit from the immediate and long-term benefits of the NSR.

⁶³ Humeyra Pamuk, Reuters, & Tom Balmforth, "U.S. and Russian foreign ministers to meet in Iceland in bid to ease friction," *Arctic Today*, May 19, 2021, www.arctictoday.com/u-s-and-russian-foreign-ministers-to-meet-in-iceland-in-bid-to-ease-friction



The NSR offers a shorter transit from Rotterdam to China, for example than through the Suez Canal. While the NSR offers economic gains in the immediate and long-term, its development also poses some serious long-term risks:

1. **Environmental:** The fragile Arctic ecosystem, already substantially impacted by climate change, is particularly susceptible to damage caused by more frequent shipping. A significant oil spill in the region would have a devastating impact on the area, prove difficult to contain, and could permanently devastate entire ecosystems, potentially making entire stretches of the NSR unliveable for the region's indigenous communities. Political ecology and environmental impacts must therefore be incorporated into any development planning to ensure sustainable practices along the NSR.
2. **Legal:** Under international law, the Arctic Ocean is part of the 'common heritage of mankind', whilst the maritime territories inside Russia's internationally recognized EEZ are not. Though Russia has claimed the entirety of the NSR, the majority of the international community refutes this and does not recognise its claims. The question, therefore, is whether the NSR should then be treated as an ITC, or as sovereign Russian waters.

As the NSR becomes increasingly navigable during the summer months when the Arctic ice melts sufficiently to allow ships to transit, use of the route will only increase in strategic importance, particularly due to its potential to significantly shorten maritime transit between Europe and Asia compared to existing routes. Considering the potential risks of Russian dominance over the transportation corridor, the international community should encourage the development and implementation of maritime norms in the NSR, particularly if it is to be used as an ITC. The legal status of the NSR, of transiting vessels and control is likely to spark disagreement in the near future. What remains unclear is whether Russia has the capabilities to be able to control the shipping routes it claims it owns. Diplomatic efforts to lower tensions in the Arctic will continue, but as long as Russia's war in Ukraine continues, any significant developments are unlikely.⁶⁴

For a region that has been a beacon of peaceful international cooperation for the last half-century, the increased tensions between Russia and the West are deeply concerning for Arctic residents and the broader international community. If the international community is serious about mitigating an escalating arms race in the Arctic, new and invigorated efforts must be

⁶⁴ Humeyra Pamuk, Reuters, Tom Balmforth, "U.S. and Russian foreign ministers to meet in Iceland in bid to ease friction", Arctic Today, May 19, 2021, www.arctictoday.com/u-s-and-russian-foreign-ministers-to-meet-in-iceland-in-bid-to-ease-friction



made to establish norms and institutions that are up to date with the regions new geopolitical and climatic realities. For example, the establishment of an Arctic Claim Settlement mechanism to resolve disputes over legal disputes would be a strong step in the right direction in mitigating any catastrophic eventualities. The creation of an Arctic International Boundary Commission to settle disputes among Arctic states would similarly work to lower tensions.⁶⁵ Again, little progress will be made on these issues while the Arctic remains divided over the invasion of Ukraine, but upon the conflict's resolution, initiatives like those outlined above could usher in a new era of Arctic cooperation and peaceful development to the benefit of all.

The NSR will undoubtedly be a flashpoint of geopolitical competition in the coming years. As Russia aims to develop enough infrastructure to transform the route into a viable ITC by 2035, persistent challenges over the jurisdiction of the Route, the environmental fragility of the region, and the geopolitics of an increasingly militarised Arctic threaten to derail the NSR's development. Important questions remain: will the NSR become a viable alternative to the Suez Canal? How effectively will Russia use the NSR as a diplomatic tool with its BRICS partners China and India? Will a more accessible Arctic encourage dissension in Europe over NATO Arctic policy? These are all questions to monitor in the coming years as the face of the Arctic continues to fundamentally change.

⁶⁵ Jeffrey F. Collins, "The Arctic in an Age of Geopolitical Change: Assessment and Recommendations," *Valdai Discussion Club* 75, September 2017, <https://valdaiclub.com/files/15544/>.

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