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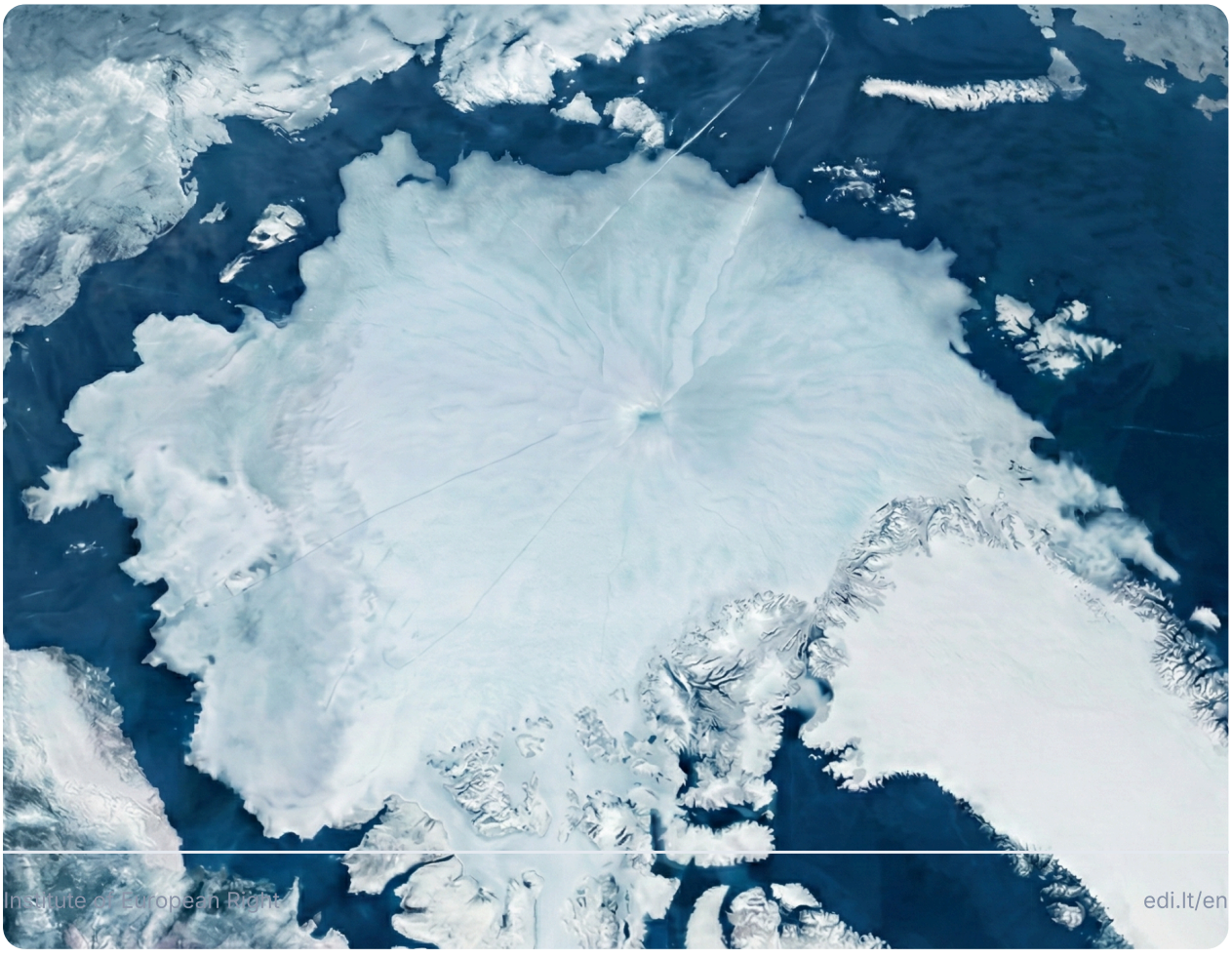
The New Ice Curtain: Geopolitical Competition, Russo-Chinese Convergence, and Western Deterrence in the Arctic

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Executive Summary

- **The Arctic is a Zone of Direct Great-Power Rivalry.**
  The region has lost its "exceptionalism", a pseudo-immunity to global tensions, and become a continuous Northern Flank for NATO following the accession of Finland and Sweden, establishing a high-risk "New Ice Curtain" border directly facing Russia and China.
- **The Core Threat is the Russo-Chinese Axis**
  The primary strategic challenge is a de facto alliance that is coordinating military signaling (joint patrols) with a joint legal "lawfare" strategy aimed at undermining international governance norms like UNCLOS.
- **Climate Change Demands Deterrence Shift**
  Rapid climate change is a severe security accelerator, melting the natural ice shield that protected Russia's nuclear deterrent and compromising vital military and civilian infrastructure built on permafrost, requiring immediate hardening and a shift in Western deterrence strategy.
- **NATO Arctic Joint Force Command (JFC)**
  To ensure effective, layered defense, NATO must create a dedicated Arctic JFC to unify command, control, and communication (C3) and enhance Maritime Domain Awareness (MDA) against Russian A2/AD and hybrid threats.
- **Secure Geoeconomic Independence**
  The West must use tools like the EU's Critical Raw Materials Act (CRMA) to secure Nordic mineral resources, achieve supply-chain de-risking, and counter China's aggressive attempts to control critical green energy and defense technologies.
- **Contest Lawfare and Hybrid Threats**
  Allies must actively contest Russia's excessive navigation claims over the Northern Sea Route (NSR) under UNCLOS Article 234 and develop robust countermeasures against hybrid threats, including pervasive GPS jamming and the risk of subsea cable sabotage.

Why the Arctic Matters

End of Arctic Exceptionalism

The Arctic region has undergone a geopolitical metamorphosis, definitively signalling the end of "exceptionalism"- the belief that the High North was immune to global tensions. The strategic environment has pivoted to one characterised by intensified great-power rivalry. The period from 2025 through 2035 is crucial for determining the nature of security threats to and from the region. Moreover, the next decade will also define how emerging technologies – particularly AI-driven climate monitoring, dual-use satellites, and autonomous maritime systems – reshape both security and governance dynamics in the Arctic.

The current volatile environment is driven by four primary and interlinked factors: geography, vast strategic resources, rapid climate change, and renewed great-power competition. Climate change and rising geopolitical tensions have drawn renewed attention to national security interests in the

Arctic since at least 2015[1].

These drivers form the strategic foundation for the postures of key actors. For Russia, the Arctic plays a significant role in its security and economic calculations and has been raised to Russia's second priority region after the European Eastern Flank[2]. Russia's policy agenda is fundamentally shaped by insecurities over its economic and military position in the region[3]. China asserts itself as a "Near-Arctic State"[4] and approaches the region primarily through the lens of maritime governance, resource development, and the establishment of favourable international rules[5].

Other Asian countries, such as Japan and South Korea, are also expanding their Arctic research and shipping interests, seeking to balance China's growing footprint while aligning more closely with Western governance norms[6].

Geography and Chokepoints

The Arctic functions as a nexus connecting the Euro-Atlantic and Indo-Pacific theatres. Russia's Arctic capabilities could threaten the United States' ability to project power into both regions. The region serves both as a potential geographic buffer and, increasingly, as an attack vector[7].

Tensions are concentrated around key chokepoints. In the European Arctic, these include the Greenland-Iceland-United Kingdom (GIUK) Gap[8] and the 'Bear gap' (between continental Norway and Svalbard)[9]. The Barents Sea is the core maritime area Russia seeks to secure to protect its strategic assets[10]. Russia also conducts low-intensity operations close to the Bering Strait[11]. The Kola Peninsula is crucial as it houses Russia's Northern Fleet and its most important SSBNs (submarine-launched ballistic missile forces)[12].

Hydrocarbons and Critical Minerals

The Arctic contains vast estimated natural wealth. The region is estimated to hold 13% of the world's untapped oil and 30% of its undiscovered natural gas reserves, a resource base that surpasses Saudi Arabia's known petroleum deposits[13]. These resources largely fall within the Exclusive Economic Zones (EEZ) of coastal states[14]. For Russia, Arctic oil and gas are fundamentally essential, accounting for 10% of its GDP and 20% of its exports[15]. State-backed energy companies have launched massive exploration projects to develop these reserves.

Beyond hydrocarbons, increased accessibility due to climate change opens up valuable critical minerals. These minerals, such as cobalt, lithium, nickel, and graphite, are essential for developing technologies ranging from renewable energy systems to electronics used for national defence. Global demand for these minerals could increase by nearly 500% by 2050[16]. Europe's largest deposit of rare earth elements was recently discovered in Kiruna, Sweden, which is critical for the transition to renewable energy[17]. Extraction efforts face substantial barriers inherent to the region. The harsh Arctic climate, remoteness, and insufficient infrastructure make drilling difficult and expensive[18]. The underlying implication is that control over resources and access corridors translates directly into leverage. Meanwhile, China has been aggressive in its overtures to develop the mineral resources in Greenland[19].

Maritime Corridors

The melting ice is accelerating the potential of Arctic maritime corridors. The Northern Sea Route (NSR), running along the Russian coast, offers a shorter Asia–Europe trade route, shortening the journey by approximately 5,200 to 7,000 nautical miles. Traffic in Arctic waters is rising, with ship numbers and distance sailed increasing by 37% over the past decade20. Russia aims to transform the NSR into a world-class transportation artery and a direct competitor of the Suez Canal[21]. The NSR functions as a dual-use corridor, serving both international commerce and Russian naval power and potential denial[22]. Russia fears that if it is not in control of the NSR, adversaries could use the marginal seas to conduct a massive precision-strike campaign[23]. Russia's advanced ice-breakers are designed to perform both transport/resupply missions and certain types of military operations[24].

The international governance of the NSR is contested. Russia claims the right to regulate the waters along the NSR beyond the authority permitted under the United Nations Convention on the Law of the Sea (UNCLOS)[25]. Russia's interpretation is based on UNCLOS Article 234 (ice-covered areas), which grants coastal states the right to adopt and enforce non-discriminatory laws for pollution prevention[26]. The United States and its allies argue that the NSR should be treated as international straits, upholding the principle of freedom of navigation.

Climate as an Accelerator

Climate change acts as a severe accelerator of geopolitical and physical instability. The Arctic is warming approximately four times faster than the rest of the globe[27]. This phenomenon is expected to lead to the first practically ice-free summer in the Arctic Ocean, potentially within a decade. The concurrent permafrost thaw releases methane and compromises ground stability[28]. This thaw introduces immense infrastructure risk. Naval bases, airfields, and radar sites built on permafrost face high risks of inoperability and structural degradation. Furthermore, the disposal and storage of nuclear sites and nuclear-powered military capabilities along the Russian coast pose serious risks of radioactive contamination[29]. The receding ice necessitates a deterrence shift, as the natural ice shield protecting Russia's SSBN bastion is lost[30].

This geopolitical tension strains Arctic governance. The isolation of Russia has significantly reduced science and data sharing , leading some scientists to warn of missing Russian data causing Arctic climate blind spots[31]. This intentional scarcity of shared data effectively constitutes data weaponisation. Furthermore, mounting geopolitical tensions threaten the long-term viability of the Central Arctic Ocean Fisheries Agreement, potentially leading to unregulated fishing, especially by Chinese fleets notorious for operating globally and often violating international laws.

From Cooperation to a New "Ice Curtain"

Russia's full-scale invasion of Ukraine in 2022 served as the inflexion point. The diplomatic boycott by the seven Western Arctic states subsequently placed the Arctic Council in a deep freeze under Russia's chairmanship[32]. Post-2022, there was a widespread mil-to-mil cut of contacts and cooperation. In response to Russia's aggression, NATO enlargement accelerated. Russia views this

as a validation of its fear of, what it calls, an 'encirclement' by the Atlantic Alliance[33]. This polarisation has resulted in the erection of a New "Ice Curtain" across the circumpolar world, making the Arctic a high-risk border between the West and Russia-China.

Russia and China in the Arctic

Russia's Strategic Recalibration

Russia's Arctic policy has undergone a strategic recalibration since February 2022. This policy is best understood through the concept of a "policy iceberg". The visible tip is the massive economic investment and cooperative rhetoric, while the larger, submerged, and most threatening element is the security-oriented and military agenda referred to as Patrushevisation[34]. This security ascendancy involves prioritizing "national, food, and environmental security," potentially leading to budget redistribution away from purely economic objectives. The overriding aim has shifted from pure development to control, asserting sovereignty over the region, and attempting to exert coercive leverage[35].

Russia promotes the Northern Sea Route (NSR) narrative as a world-class transportation artery and direct competitor to the Suez Canal[36]. However, Russian energy giants like Rosneft and Gazprom are increasingly subordinated to military-strategic objectives, with sanctions having disrupted key oil and gas projects and restricting access to Western technology[37]. Gazprom Neft, for instance, initiated the creation of its own private military companies affiliated with the local oil industry[38]. This development illustrates a broader militarisation of Russia's industrial base, where the boundaries between state security and corporate enterprise are increasingly blurred.

Deterrence and the Bastion

Russia's overarching military priority is ensuring the safety and longevity of its nuclear deterrent. The Kola Peninsula remains the core, hosting Russia's Northern Fleet[39]. Naval bastions are explicitly noted as crucial for Russia's preservation of its nuclear second-strike regime[40]. The Cold War-era Bastion concept, formally adopted in 1998, aims to fortify key areas such as the Barents Sea and the Kola Peninsula with layered A2/AD (Anti-Access/Area Denial) systems. This defence network consists of guided-missile submarines, guided-missile surface combatants, and land-based anti-ship bombers, utilising naval mines monitored by ISR (Intelligence, Surveillance, and Reconnaissance) and air defence surface-to-air missile systems (S-300, S-400). Russia has developed a non-nuclear deterrence capability based on long-range precision-guided missiles (PGM), blurring the lines between nuclear and non-nuclear weapons in operational thinking[41].

Despite conventional ground attrition in Ukraine, Russia's strategic naval/air/nuclear forces, including its newest Borei- and Yasen-class submarines, remain intact[42]. Russia has continued modernising its SSBN inventory, with five Borei-class SSBNs commissioned in the Pacific Fleet and two in the Northern Fleet. Since 2012, Russia has increased its military presence through the construction of Arctic bases and modernisation of airfields, including major dual-use outposts at Nagurskoye, Kotelny, Rogachevo, and Tiksi[43]. An example of recent build-up is the revival of

Severomorsk-2 air base, located just east of Murmansk. The base has been abandoned for around 25 years, but is now stationing helicopters as seen through satellite imagery[44]. The accession of Finland and Sweden to NATO has increased the exposure of Russia's military assets on the Kola Peninsula and Russia is adapting. This shift in military-geographical conditions serves as a dispersal incentive, pushing the Northern Fleet's centre of gravity eastward and scattering its infrastructure across Russia's Arctic territories[45].

Lawfare and Hybrid Pressure

Russia employs lawfare (the strategic weaponisation of legal pretexts) as a key instrument of hybrid activity in the maritime domain. Russia claims the right to regulate the Northern Sea Route based on UNCLOS Article 234 (ice-covered areas), imposing excessive requirements like mandatory pilotage/notification on foreign vessels, and FSB/Defense Ministry units have developed anti-FONOP plans[46]. Russia has also signalled a willingness to contest the liberal maritime order by UNCLOS-exit signalling[47]. Moscow continues to pursue claims for an extended continental shelf (>200 nm), which involves overlap with Danish and Canadian claims, asserting de facto control over the central Arctic Ocean[48]. Russia is also engaged in disputes over the Svalbard Fisheries Protection Zone (FPZ), contesting Norwegian jurisdiction49.

Russia uses a widening toolkit of hybrid threats, including GPS jamming in northern Norway and Finland, drone flights, and probing activity. Russian-linked vessels have been implicated in the disruption of the Baltic subsea cable in 2022[50]. Russia uses dual-use trawlers/research vessels, which maintain plausible deniability while conducting reconnaissance and seabed mapping near critical infrastructure, including through the GUGI deep-sea sub-unit of the Main Directorate of Deep-Sea Research[51]. Russia also employs Indigenous/environmental concerns for anti-Western narrative weaponisation[52].

China's Status, Intent and Near-Arctic Claims

China has declared itself a "Near-Arctic State" and asserts its global ambitions by aiming to become a great polar power. The 2018 White Paper clarifies China's vision for the Arctic, emphasising its rights to explore and exploit the area[53]. Interestingly, over the last decade, China has made its position and strategy towards the Arctic increasingly covert, hinting at the region's growing strategic importance to China. China's strategy aims to increase its overall geopolitical influence (or huayu quan-discourse power) by participating in international rule-making processes.

China's approach is a calculated mix of pragmatic cooperation vs competition. Externally, Beijing promotes collaboration and sustainable development; domestically, it emphasises competition for resources[54]. China utilises lawfare to contest Arctic governance. It argues for resolving Arctic disputes under the current system of international law of the sea (UNCLOS)[55]. Still, Chinese legal scholars argue Beijing should seek to clarify and supplement the vague provisions of UNCLOS, employing flexible and dexterous measures to maximise national interests.

This approach involves a critique of the liberal order's legal ambiguities and efforts towards norm revision. Specifically, China emphasises the distinction between sovereignty (zhuquan) and sovereign rights (quanli), arguing that the Arctic does not belong to any single state and that the high seas areas constitute a region for the common enjoyment of humankind[56]. China also maintains an anti-sector principle stance and has conducted FoN (Freedom of Navigation) signalling, such as when Chinese naval vessels entered the U.S. 12-nm zone near Alaska in 2015.

Beijing's approach reflects a long-term strategic patience – preferring incremental norm shaping and quiet presence-building over overt confrontation. This gradualism allows China to expand its influence while avoiding the perception of direct challenge to Arctic sovereignty norms. Over time, such an approach could yield a *de facto* presence and agenda-setting power that rivals traditional Arctic states.

Polar Silk Road

The Polar Silk Road (PSR) is the framework for China's economic engagement in the Arctic, focusing on NSR corridors, LNG, mining ores, and resource acquisition[57]. China is deepening cooperation with Russia to sustain Arctic infrastructure projects. A major step was the 2023 agreement placing Chinese efforts under Russia's NSR umbrella[58]. This cooperation extends to joint military signalling, including joint patrols and possible coordination between the Chinese Coast Guard (CCG) and Russia's FSB (Border Guard/Coast Guard)[59]. China's PSR focus also serves to acquire critical minerals/REEs (Rare Earth Elements), giving China supply-chain leverage over Western nations moving toward green energy and defence technology[60].

China employs military-civil fusion doctrine, leveraging dual-use science/ISR to achieve military aims. China maintains scientific research facilities, such as the Yellow River station on Svalbard, and its long-range fishing fleets are suspected of carrying out ISR and reconnaissance activities in sovereign waters[61]. China's research centres may also be equipped for signals intelligence (SIGINT) gathering[62].

China's growing submarine force and access via melting sea ice raise the prospect of its SSBNs operating in the Arctic, placing them within closer range of the contiguous U.S., potentially altering the under-ice SSBN horizon[63]. China and Russia have collaborated on joint bomber overflights near Alaska, intercepted by NORAD[64]. China seeks commercial port access across the region, which could support a growing People's Liberation Army Navy (PLAN) tempo65.

Russo-Chinese Convergence

The reliance of Russia on China following the 2022 invasion of Ukraine created an environment where the two countries operate as a de facto axis in the Arctic. It poses a serious danger to the United States and its allies. This cooperation presents a dual-pronged strategic challenge: a legal pincer movement combining Russia's aggressive claims of NSR control under UNCLOS Art.234 with China's broader efforts toward norm reshaping in the global community[66]. This partnership exerts immense Northern Flank pressure on NATO. China is gaining access and influence, capitalising on Russia's infrastructure through technological and financial investment67. For the West, this

convergence creates exposure in homeland defence. The likely military threat to NATO nations is from Russian and Chinese missiles fired from the Arctic, compounded by the prospect of PRC under-ice operations increasing the nuclear threat proximity to the US.

NATO, EU, and Western Allies in the Arctic

Deterrence on the Northern Flank

The security architecture of the Arctic has been fundamentally transformed by the accession of Finland and Sweden to NATO in 2023 and 2024, confirming the end of Arctic exceptionalism. With seven of the eight Arctic states now NATO members, the Alliance possesses a continuous Northern Flank stretching from the Bering Sea to the Barents Sea. This integration necessitates a shift toward modernised deterrence. Politically, this demands a recalibration of NATO's strategic concept to explicitly integrate Arctic deterrence as one of the core functions, not a peripheral theatre.

The military environment is characterised by distinct threats. According to some opinions, the most likely kinetic attack against NATO nations in the Arctic comes from Russian and Chinese missiles fired from submarines, bombers, or Arctic bases[68]. NATO must contend with Russia's layered Anti-Access/Area Denial (A2/AD) capabilities, which aim to ensure Russian sea control over key areas and protect its strategic assets[69]. Furthermore, Russia's increasing reliance on China provides the self-proclaimed China near-Arctic state an opening to challenge the Western rules-based order.

Effective deterrence requires maintaining the security of transatlantic SLOCs (Sea Lines of Communication). A core strategic priority is keeping the GIUK Gap (Greenland-Iceland-UK) open for the flow of Allied reinforcements[70]. The UK's Atlantic Bastion concept aims to bolster ASW (Anti-Submarine Warfare) capabilities through a layered and integrated sensor network. This defence posture envisions the deployment of uncrewed systems, such as USVs (Uncrewed Surface Vehicles) and XLUUVs (Extra-Large Uncrewed Undersea Vehicles), to form an autonomous ASW screen across the North Atlantic[71].

Signalling capacity and intent are a continuous function of general deterrence in the European Arctic. NATO maintains a visible presence through joint ops and large-scale exercises like Nordic Response, which practice defending the northern flank[72]. France, for example, regularly participates in major NATO exercises in the Arctic region, demonstrating interoperability[73]. Allied carrier/bomber tasking, such as B-52 simulated weapons drops in Finland, further reinforces resolve74. The network of bilateral Defence Cooperation Agreements (DCAs) signed by the U.S. with Nordic states grants unimpeded access to crucial ports in Norway and Iceland, strengthening interoperability and logistics[75]. The Alliance should more actively counter Russian hybrid attacks, including pervasive GPS jamming in northern Finland and Norway, and the risk of subsea infrastructure sabotage through cable cuts[76]. Ultimately, deterrence relies on credible escalation ladders underpinned by the political will to enact Article 5.

Toward an Arctic Joint Force Command

The U.S. Department of War's existing 2024 Arctic Strategy advocates a "monitor-and-respond" approach[77]. However, the complex strategic environment demands a more robust and integrated structure to provide effective command, control and communication (C3). There is a demonstrated need for a dedicated NATO Arctic JFC (Joint Force Command) to execute an effective layered defence against increasingly belligerent Russo-Chinese cooperation. The current bilateral NORAD agreement is deemed insufficient to close the persistent C3 and domain awareness gaps, highlighting the need for a unified NATO-centric command structure focused specifically on the defence of the Arctic[78].

A critical component of this overhaul is integrating the specific expertise of the Nordic Allies. Norway, Finland, and Sweden bring Nordic expertise and capabilities to the Alliance, emphasising their importance for deterrence and collective defence. NATO's new structures must leverage this knowledge, including by incorporating local and traditional knowledge (e.g., from local Rangers in Canada) into training and adapting procedures. Enhanced data fusion and real-time domain awareness between NATO, NORAD, and EU intelligence systems will be essential for maintaining decision superiority in the Arctic.

EU Economic Security

The European Union's influence and reach in the Arctic are intrinsically tied to its Nordic members. The Euro Arctic region benefits from the high capacity provided by the accession of Finland an Sweden and deep integration with EEA members Norway and Iceland. The geopolitical dynamics of the Arctic have thrust the EU into a more prominent role, focusing on economic security and mitigating vulnerabilities exposed by geopolitical rivals.

One key area of focus is critical resources. The EU's Critical Raw Materials Act (CRMA) aims to increase mineral self-sufficiency by streamlining permits/finance for strategic projects, thereby achieving de-risking from PRC supply chain dominance[79]. Nordic minerals are vital to this effort, particularly the discovery of Rare Earth Elements (REEs) by LKAB in Kiruna, Sweden[80]. Finland also possesses deposits essential for European supply chains. Geopolitical competition extends to Greenland, where local authorities have demonstrated resistance to foreign control. Greenland has taken steps towards PRC denial, including stripping a Chinese mining firm of its license for an iron ore deposit[81]. China utilises dual-use infra/research facilities, such as the Yellow River station on Svalbard, to mask potential intelligence activities[82]. Furthermore, infrastructure projects, such as Arctic ports/rails proposed in Finland, become geopolitical flashpoints due to their potential dual-use nature.

Strategy for a Free North

The future strategic environment will be shaped by the intensifying competition driven by Russia, China, and climate change. According to an Atlantic Council study, there are four main scenarios of geopolitical development in the region: Arctic Tsar (Russia asserting control), Hot Sauce (accelerated competition due to climate change), Arctic Middle Kingdom (Chinese dominance), and Empty Freezer (Russian collapse/fragmentation)[83].

A successful “strategy for all seasons” must continuously stress-test the alliance’s preparedness, close C3 gaps, improve MDA (Maritime Domain Awareness), and enhance resilience[84]. The overarching goal is to preserve the Arctic as a region free from coercion from Russia and China, ensuring adherence to international rules and norms[85].

Layered Defense

To execute this strategy, NATO must stand up an Arctic JFC to close the persistent C3 gaps and ensure effective layered defence across the Northern Flank. Allies must develop comprehensive plans for Russian sea-control contingencies by investing in layered ASW defences and enhancing long-range strike capabilities. Crucially, efforts are needed to harden subsea/space infrastructure against hybrid attacks, develop robust countermeasures against electronic warfare threats such as GPS jamming, and plan tailored hybrid response plans.

A Free North strategy requires Allies to adequately procure Arctic assets, specifically modern submarines, Arctic-capable frigates, and icebreakers. The recent announcement that the U.S. will acquire 11 new icebreakers is a welcome sign that necessary capability-expansion steps are being taken[86]. Developing Persistent MDA requires continuous investment in early warning, tracking sensors, and robust C5ISR capabilities[87]. This includes potentially incorporating next-generation sensor arrays and integrating space/cyber/ISR components with new USV/XLUUV technology[88]. NATO must also actively track PRC dual-use research vessels and icebreakers that might be collecting signals intelligence or conducting ISR[89].

Counter-Lawfare

The West must pursue geoeconomics strategies for mineral independence by actively seeking to execute CRMA provisions to facilitate Nordic/Greenland projects. Concurrently, a robust lawfare posture is mandatory to safeguard the rules-based order. This involves aggressively contesting PRC norms that exploit ambiguities in international law and challenging Russia’s excessive claims regarding navigation rights along the Northern Sea Route under NSR Art.234[90]. The position of the U.S. remains complicated by its non-signatory status to UNCLOS, complicating efforts to fully contest resource claims and potentially limiting its ability to pursue an extended continental shelf claim (ECS).

Partners and Contingencies

The Western Alliance must carefully monitor the North Sea Route cooperation between Russia and China, including joint patrols and military signalling. Western planning must also prudently plan for Russian fragmentation (the Empty Freezer scenario) to account for potential consequences like loose nuclear weapons, civil conflict, and subsequent PRC bids on territory/resources in the event of weakening Russia in the case of favourable advances for Ukraine in the conflict. Finally, NATO must broaden its partners, extending defence dialogues and cooperation beyond the core Arctic Allies to include key strategic partners in the Indo-Pacific, such as Japan and South Korea, particularly regarding monitoring activities in the North Pacific region.

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