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Russia in the Arctic

Gauging How Russia's Invasion of Ukraine Will Alter Regional Dynamics

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About the Transatlantic Security Program

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Executive Summary

Russia's reinvasion of Ukraine in February 2022 is producing ripple effects that will reverberate far beyond Ukraine for years to come, affecting issue areas and regions where the United States and Europe must manage relations with Moscow. Such effects will certainly be felt in the Arctic (which for this study will be limited to the European Arctic or the "High North"). Already, Russia's aggression in Ukraine has compelled Finland and Sweden to apply for NATO membership, altering the region's security architecture. Amid the changes that are unfolding, it is critical that analysts and policymakers reexamine long-standing assessments and assumptions about Russia. To that end, this paper reexamines Russia's approach to the Arctic in light of events in Ukraine.

Given the high degree of uncertainty about the trajectory of the war in Ukraine and its effect on Russia, it is impossible to confidently project a single future for Russia's Arctic policy. CNAS researchers, therefore, identified four drivers that are most likely to shape Russia's approach to the Arctic: Russia's perception of the Western threat, the impact of Western sanctions, China's role in the Arctic, and whether Putin remains in power. Using different permutations of those drivers, the authors developed three scenarios for how the future Russian approach to the Arctic could evolve looking out to 2025.

SCENARIO ONE: ISOLATED RUSSIA

Russia's economy is badly damaged because of effective and lasting Western sanctions, and Moscow is isolated from the West and other partners such as China, which seeks to avoid European backlash that could stem from its support for Moscow. The degradation of Russia's conventional military forces in Ukraine leads Moscow to double down on its nuclear arsenal, raising the importance of protecting its second-strike nuclear capability in the Northern Fleet. Russia's poor military performance in Ukraine also leads Putin to view the Arctic as an opportunity to demonstrate that Russia is still a power to be feared. Putin seeks to use frequent displays of military power in the region, where Russia still enjoys a subregional military advantage, to restore the Russian military's image as a formidable force. Russia occasionally stages complex, attention-grabbing "warning" exercises by flexing its nuclear capability and uses the Arctic as a testbed for new and experimental weapon systems. In this scenario, there is heightened risk of escalation, either unintentional, or because Moscow intentionally instigates a provocation designed to show that Russia is the dominant power in the Arctic—a proposition that grows if Russia calculates that the United States and NATO are exhausted amid a long, grinding war in Ukraine.

SCENARIO TWO: RUSSIA-CHINA ENTENTE

The Russian economy is resilient to sanctions, largely due to hydrocarbon and mineral exports as well as cooperation with partners outside the West, especially China. Russia and China deepen their military and economic relationship, as Putin can no longer refuse Xi's demands to have a Chinese military presence in the Russian Arctic. Russia and China conduct joint air patrols and share satellite capability, while Russia allows China to build military facilities in the Arctic. Although little information is available, there are indications that Russian Arctic development is having a devastating effect on the environment. In this scenario, a Chinese military presence (or major exercises) in the Russian Arctic or in the Northern Sea Route would complicate U.S. Navy competition with China in the Indo-Pacific by adding another theater of operations—in this case the Arctic—where the U.S. Navy would have to monitor Chinese naval operations and perhaps even prepare for potential confrontation.

SCENARIO THREE: POST-PUTIN RUSSIA

Vladimir Putin is no longer in office. A civilian government staffed by "technocrats" is established, although real power remains in the hands of the security services. The government initiates a global charm offensive to garner support for Russia's reintegration into the international community. Looking to bolster an economy weakened by sanctions, Moscow appeals to Western energy companies to return and for the Arctic Council to resume. Meanwhile, satellite imagery indicates continued infrastructure buildup at key Russian Arctic military bases and the acceleration of Moscow's efforts to enhance its anti-access/area denial capabilities along the Northern Sea Route. While NATO expresses concern about Russia's actions in the Arctic, its 32 members remain divided on the best way to deal with the new government. In this scenario, Putin's departure raises hard questions

the transatlantic allies will have to confront about how to approach Moscow. Opposition to Putin and his authoritarian regime is currently a unifying force for the West and his departure could produce uncertain and conflicting responses. The better the Russians behave, the harder it will be to keep the alliance unified. While some countries may seek to guide Russia toward democracy, others will remain skeptical of Russia's intentions and its ability to overcome its authoritarian past. This divergence would place strains on NATO and the European Union, potentially fracturing their approaches to Russian actions, including those in the Arctic.

Key Takeaways

- Contrary to Putin's statements suggesting that Finland's and Sweden's NATO membership do not pose a threat to Russia, their entry into the alliance will profoundly alter regional security dynamics, Moscow's relations with each country, and ultimately Russia's threat perception in the region.
- The Kremlin's sense of security is most likely to be affected by the movement of any NATO infrastructure into Finland and Sweden, the increased size and complexity of NATO exercises in the region, the gathering of air forces on the Scandinavian peninsula, cross-border air exercises, enhanced intelligence collection, and the changed dynamics in the Baltic Sea, which will now be surrounded by NATO member states. This sense of Russian insecurity could increase the chance of miscalculation and escalation.
- Russia's war in Ukraine and the weakening of its conventional forces will likely drive the Russian political and military leadership to see an increase in the utility of nuclear weapons in managing escalation and conflict, increasing the importance of the Kola Peninsula.
- Russia's growing sense of vulnerability, along with reduced channels of communication with the West, is likely to lower the threshold of what the Kremlin responds to in the Arctic and is likely to increase the unpredictability of Russia's actions there. Putin is also likely to view the Arctic as a venue for demonstrating that Russia is still a power to be feared, raising the risk of Russian provocations and miscalculation/escalation in the Arctic.

Introduction

Russia's reinvasion of Ukraine in February 2022 is producing ripple effects that will reverberate far beyond Ukraine for years to come, affecting issue areas and regions where the United States and Europe must manage relations with Moscow. Such effects will certainly be felt in the Arctic (which for this study will be limited to the European Arctic or the "High North"). Already, Russia's aggression in Ukraine has compelled Finland and Sweden to apply for NATO membership, strengthening the region's security architecture. Although Russian President Vladimir Putin has publicly stated that their membership in the alliance does not pose an immediate threat to Russia, their membership is sure to change the region's security dynamics and increase the sense of threat that Moscow perceives, leading to still-undefined changes in Moscow's relations with its Arctic neighbors.

Beyond Finland's and Sweden's entry into NATO, Moscow's future foreign policy approach will be influenced by additional changes playing out in and around Russia. These include the significant rise in confrontation between Russia and the West; the impact of Western sanctions on Russia, including on the Russian military; the evolving Russia-China relationship; and the heightened possibility of leadership change in Russia. Although it is still unclear how the war in Ukraine will end, the torrent of nationalism the Kremlin has unleashed in the country and the lived experience of the war in Ukraine—a war that the Kremlin has framed as a great patriotic endeavor—will shape the worldviews of current and future Russian officials; these altered worldviews will have unpredictable effects on Moscow's foreign policy priorities and decisions. Any one of these changes could dramatically alter Russia's actions in and approach to the Arctic. Although Russia will emerge from the war in Ukraine weaker, a wounded Russia is still a dangerous Russia, and the Arctic provides the Kremlin with a venue to attempt to demonstrate that Russia remains a great power to be feared.

Amid the changes that are unfolding, it is critical that analysts and policymakers reexamine long-standing assessments and assumptions about Russia. To that end, this paper reexamines Russia's approach to the Arctic in light of events in Ukraine. Given the high degree of uncertainty about the trajectory of the war in Ukraine and its effect on Russia, it is impossible to confidently project a single future for Russia's

Arctic policy. CNAS researchers, therefore, developed three scenarios for how the future Russian approach to the Arctic could evolve looking out to 2025. The three scenarios presented in this report aim to prepare policymakers and planners for the possible futures they could face and the implications of those futures, including key challenges and opportunities that may arise in the years to come.

The report first identifies the drivers that are most likely to shape Russia's approach to the Arctic and discusses how those factors are evolving. These drivers include Russia's perception of the Western threat, the impact of Western sanctions, China's role in the Arctic, and whether Putin remains in power. Using different permutations of those drivers, the report then spells out three scenarios for Russia's approach to the Arctic: an isolated Russia, a Russia-China entente, and a post-Putin Russia. These three scenarios were chosen based on their potentially significant impact on U.S. and European national security interests. For each scenario, the report discusses the implications of the given world for the United States and Europe.

Key Drivers of Russia's Future Approach to the Arctic

The report's authors identified four drivers that are most likely to shape Russia's future approach to the Arctic: Russia's perception of the Western threat, the impact of Western sanctions, China's role in the Arctic, and whether Putin remains in power. Although there will be many factors that shape the Kremlin's actions in the Arctic, the authors assess these four factors to be both the most consequential and the most uncertain. In other words, these four factors are likely to be critical, and yet given all the changes in the current environment it is difficult to gauge exactly how they will evolve looking out to 2025. The importance and uncertainty of these drivers underscore the utility of a scenarios approach in gauging future Arctic dynamics.

Russia's Perception of the Western Threat

Russia's reinvasion of Ukraine has significantly degraded relations between Russia and the other Arctic nations and prompted the European Arctic states to take steps to enhance their security. In this way, Putin's actions have prompted the very dynamics that he sought to avoid and that will likely increase Russia's sense of vulnerability. Most critically, less than three months after Russia launched its military offensive against Ukraine, Finland and Sweden applied to join NATO.

Putin publicly stated that Moscow does not view Finland and Sweden joining NATO as an immediate direct threat to Russia. However, this is likely only partially true. The Kremlin certainly already recognizes the deep and growing cooperation between these countries and NATO. Finland and Sweden were already enhanced opportunity partners at NATO, making them largely interoperable with the alliance, and they already were engaging in major exercises with NATO nations and participating as observers in NATO ministerial meetings and summits. Putin had built these dynamics into his view of the Arctic region.

Nonetheless, Swedish and Finnish entry into NATO is still significant from the Kremlin's perspective, as their membership in the alliance will affect regional security dynamics, Russia's relations with each country, and ultimately Moscow's sense of threat in the region. Looking forward, several factors will shape this sense of threat. Russia will be concerned about NATO infrastructure moving closer to its border. Moscow is likely to be sensitive to NATO or the United States establishing new, permanent military facilities in Finland, including intelligence facilities; conducting large exercises there (Russia finds NATO exercises more provocative than national exercises by individual NATO nations); or deploying enhanced forward presence battlegroups or nuclear weapons along the Finnish-Russian border. Sweden has announced that it will not allow NATO military bases or nuclear weapons on its territory; although Finland has not set any conditions for its membership, many officials also remain opposed to the idea of having NATO military bases or nuclear weapons on their country's territory. Even absent these developments, which are unlikely anyway, Russia will almost certainly now view Finland and Sweden as potential springboards for the United States and NATO to attack Russia, heightening the Kremlin's sense of threat. Moreover, once Finland and Sweden join the alliance, seven out of eight Arctic countries will belong to NATO, which will dramatically alter political dynamics in the Arctic Council if and when it is restarted with Russian participation, along with those in other associated groupings of the Arctic nations. Finally, Moscow will assume that Finland's and Sweden's NATO membership will result in greater NATO focus on the Arctic.

More broadly, Russia's threat perception will also be shaped by the significant changes in the security dynamics in the region as a result of Finland's and Sweden's NATO membership. The strategic impact of having the Baltic Sea surrounded by NATO nations that can create an anti-access/area denial capability changes

Russia's security picture. Moscow may be especially paranoid that the United States will put Patriot air defense missile systems on Sweden's Gotland Island along with a permanent deployment of Swedish forces.

Moreover, further prompted by Russia's attack on Ukraine, all Nordic countries are increasing their defense budgets. They will also continue to deepen defense cooperation with the United States and with each other through the Nordic Defence Cooperation (NORDEFCO), including the development of a Nordic total defense concept and greater coordination of operational planning. Russia views these developments negatively, and it is likely that its threat perception of the West in the Arctic region has already increased, including a heightened sense of potential threats to its submarine-based second-strike nuclear capability home-ported on the Kola Peninsula. Additionally, Finland's purchase of the F-35, together with similar Norwegian and Danish F-35 purchases, would provide unprecedented tactical and operational air coverage of Russia's western flank from Murmansk to St. Petersburg.

Finally, the suspension of regional cooperation between the Nordic countries and Russia will likely foster greater mistrust and, possibly, a greater sense of threat over time. Because of Russia's invasion of Ukraine, the Arctic states have suspended regional cooperation with Russia in the Arctic Council, the Barents Euro-Arctic Council, and the European Union's Northern Dimension policy framework. This may have the unintended consequence of breeding greater mistrust over time by eliminating opportunities for dialogue and isolating the largest Arctic nation—Russia—without whose participation in Arctic Council decisions, including taking its turn as Arctic Council chairman, makes those decisions much less significant.

The Impact of Sanctions

Russia's economic capacity to invest in developing the Arctic and to expand (and even sustain) its military footprint and activities in the region will depend in large part on the state of Russia's economy. The sanctions imposed by the United States and its international partners following the Russian invasion of Ukraine have been unprecedented in their scope. Hitting key targets such as the Russian central bank, major commercial banks, technology exports to Russia, and prominent oligarchs, these new penalties will damage Russia's economic prospects going forward. While the precise size of the impact on Russia's economy is unclear, most reputable forecasts from both inside and outside Russia envisage a contraction of gross domestic product (GDP)—the IMF in July 2022 projected that Russia's economy would contract by 6 percent in 2022, although some suggest the economic hit will be harder.[1]

The full extent of the impact of sanctions on Russia looking out to 2025 remains uncertain and will depend on several key dynamics, including the duration of Western sanctions, the speed and extent of Europe's transition away from Russian energy, and Russia's ability to adapt to the sanctions, including through its ability to develop an effective import substitution program. The extent of support that Russia receives from partners such as China will also influence the impact of sanctions and the efficacy of export controls. It is reasonable to expect, for example, that Moscow will seek to mitigate the effects of sanctions, including by pursuing efforts to replace the most sensitive technologies required for its military. The form that such efforts will take may vary, ranging from the use of espionage and illicit trade networks to the development of Russian-made alternatives or even jointly produced technologies with the likes of China and India. The restrictions imposed on Russia's ability to access sensitive technologies are certainly severe, but they are also something with which Russia, and before it the Soviet Union, has experience. The Kremlin then may well be able to blunt the full impact of Western measures designed to weaken the Russian military and therefore Russian capacity in the Arctic.

It is reasonable to expect that Moscow will seek to mitigate the effects of sanctions, including by pursuing efforts to replace the most sensitive technologies required for its military.

Likewise, even if Russia's prospects for economic growth remain bleak, at least in the short term, the Russian state's fiscal position may not be quickly weakened, also facilitating Moscow's efforts to sustain investments in its military and economic activities in the Arctic. A combination of elevated prices for Russia's principal exports (e.g., oil, gas, coal, grains, and other commodities) and a weak currency mean that ruble tax revenues have grown since sanctions were imposed. Russia recorded a federal budget surplus of 2.6 percent of GDP in the first quarter of

the year, which may rise further if commodity prices continue to increase.[2] Moreover, Russia has a history of insulating defense spending from economic downturn.

> **Russia's invasion of Ukraine calls into question how far Beijing will be willing to go to work with and support its closest partner in the Kremlin.**

All of these uncertainties about the ultimate impact of sanctions on Russia make it difficult to assess what resources Russia will have available for its military development, and its ability to sustain (or increase) its activities and exercises in, and economic development of the Arctic.

China's Role in the Arctic

Throughout the last decade, albeit less actively in the last couple of years, China has become increasingly interested and active in the Arctic. Beijing has used scientific expeditions to build its maritime domain awareness and establish a toehold in the Arctic region. It has focused on increasing both its authority in the Arctic and its access to trade routes and regional resources—from liquefied natural gas (LNG) to maritime protein. Russia and China have pursued a number of joint projects, including in port construction, mining, and energy. Warming temperatures will allow for greater exploration for oil, gas, and mineral sources, granting opportunities for players, including China, to tap into the region's resources and expand their footprint. Beijing has outlined a vision for a "Polar Silk Road" that would expand trade in the Arctic as part of its Belt and Road Initiative, and it has also signed an agreement that could provide up to $9.5 billion in Chinese funds for infrastructure projects along the Russian-managed Northern Sea Route (NSR).[3]

In these ways, China has demonstrated its interest in the Arctic. However, Russia's invasion of Ukraine calls into question how far Beijing will be willing to go to work with and support its closest partner in the Kremlin. Russia's invasion of Ukraine, in other words, raises questions about the future of China's role in the Arctic. On the one hand, Beijing could opt to keep Moscow at arm's length, wary of the political backlash that its more direct support for Russia could elicit from Europe. China could decide, for example, to refrain from backing Russia on energy or economic matters and to abandon or slow pursuits on joint development of the NSR. On the other hand, China could sustain or deepen its support for Russia, especially once the international spotlight moves away from Ukraine. In this case, China could provide significant aid to Russia, resulting in an increase in Arctic activity through offshore drilling, infrastructure projects, joint military exercises, and even a persistent Chinese military presence in the region.

The Future of Putin

It is all but impossible to imagine any improvement in U.S. and European relations with Russia while Putin is in power. Putin's longevity in office, therefore, is a key driver shaping how the other Arctic states engage with Russia in the region, which in turn will influence Russia's posture there.

Putin's decision to invade Ukraine has raised real questions about his hold on power. Putin will most likely be able to withstand any domestic blowback that results from the war in Ukraine. High levels of repression, the Kremlin's control over the country's information environment, and the historic loyalty of the security services position Putin to weather any domestic challenges. However, his hold on power is undoubtedly weaker now than it was before he invaded Ukraine. Although it is difficult to gauge the extent of opposition to Putin given the high costs that are associated with expressing opposition to the regime, there appears to be a sizable segment of the population that opposes the war and the continuation of Putin in power. Given increased uncertainty about Putin's position and the impact that his exit from power could have on the way that the West approaches Russia, the report authors viewed Putin's future as a key driver to consider when thinking through Russia's approach to the region.

Scenarios for Russia's Approach to the Arctic

The authors examined numerous permutations of the above drivers and selected three scenarios that the authors judged as having the most significant implications for U.S. and European national security interests. For each scenario, the report describes the state of the world, with a particular focus on how conditions in the given scenario would shape Russia's approach to and actions in the Arctic as well as the implications of those actions for the United States and Europe. The scenarios are not mutually exclusive, and it is likely that future reality will involve elements of

more than one scenario. The scenarios are designed to prepare policymakers and planners for the possible futures they could face, including key challenges and opportunities that may arise in the years to come. All three scenarios look out to 2025.

Scenario One: Isolated Russia

Despite the Russian military's initial poor performance and high casualty toll in the follow-on fighting, and severe economic hardship resulting from the sanctions, Putin further increases repression to maintain domestic control and stay in power. In this scenario, the Chinese government maintains an uneasy balancing act of avoiding condemnation of Russia's ongoing protracted war in Ukraine while refraining from helping Moscow evade sanctions or providing it with military assistance. Additionally, Russia's relations with the United States and Europe remain at an all-time low amid the continuing war.

An economically weakened Russia pursues a "carrot and stick" strategy toward the West and the Nordic region, combining coercive diplomacy with efforts to rejoin the international system. While reverting to a game of "divide and conquer" that focuses on sowing NATO and EU disunity, Russia simultaneously attempts to bolster its legitimacy by renewing Arctic governance regimes and cooperative forums. Targeting regional interest groups such as Indigenous communities, Moscow promotes the idea of Arctic exceptionalism, vowing to shelter the region from the impact of the war. The Kremlin's aim is to reinforce the image of Russia as a reliable and responsible Arctic partner, essential for cooperation in areas such as humanitarian assistance, disaster relief, environmental protection, scientific research, fisheries, search and rescue, and people-to-people dialogue.

In this scenario, NATO strengthens its deterrence by improving the alliance's capability to operate in the Arctic and increases the number and complexity of its exercises in the region. The United States periodically deploys aircraft carriers, strategic bombers, and submarines to the Arctic, increasingly making use of allied military infrastructure. At NATO, the Nordic allies continue to raise the need to prepare for "unexpected contingencies" in the Arctic. Among the U.S. armed forces, there is increasing discontent with the lack of U.S. investment in key capabilities needed to conduct Arctic operations, such as ice breakers, secure communications that work in the High North, long-range intelligence, surveillance and reconnaissance assets, and cold-weather gear for the Army.

The increased Western presence in the Arctic, further strengthened by Swedish and Finnish NATO membership, feeds Russia's persistent sense of insecurity. Extensive matériel and personnel losses in Ukraine continue to undermine both the effectiveness and the prestige of the Russian armed forces. Western sanctions and export controls severely complicate Russia's ability to reconstitute its depleted conventional military forces, deepening Russia's perception of its conventional inferiority and increasing its dependence on nuclear deterrence. In the European Arctic, Russia's focus is on the maritime and air domains, with protection of its second-strike nuclear capability in the Northern Fleet becoming increasingly critical. Given limited conventional military resources, Russia depends on tactical nuclear weapons for deterrence and deploys them in the High North, including on Alexandra Land. Despite economic difficulties, Russia continues subsidizing its foothold on Norway's Svalbard archipelago, using its scientific presence there to periodically challenge Norwegian sovereignty.

After Finnish and Swedish accession to NATO, all Baltic Sea and Arctic states except Russia belong to the alliance, increasing the importance of the Barents Sea in Russia's military planning. Russia maintains a regular tempo of significant military exercises in the Barents and Norwegian seas as well as air patrols along—and occasionally intruding into—Norwegian, Finnish, and Swedish airspace. GPS jamming and cyberattacks occur sporadically in border regions, and there are allegations of "Havana Syndrome" attacks linked to visits by Nordic political leaders to border areas. The Baltic Sea has also seen an increase in Russian military activity and unprofessional behavior like aggressive buzzing by Russian combat aircraft of U.S. and allied naval vessels.

The dismal state of Russia's economy is felt domestically. Sustained sanctions drive the Russian economy into recession, and the depreciating ruble decreases real incomes and purchasing power. Localized protests burst out across Russia, including in the Arctic cities, but are swiftly put down. Although Russia seeks to portray its position in Ukraine as a "victory," many Russians are questioning the Kremlin's competence and ability to sustain Russia as a great power.

Against this backdrop, made ever starker by the persistent nationalist rhetoric, Putin looks to the Arctic as an opportunity to shore up domestic prestige. He seeks to use frequent displays of military power in the region, where Russia still enjoys a subregional military advantage, to restore the Russian military's

image as a formidable force. State media efforts to exploit spectacular naval displays over the North Pole resonate positively with nationalist members of the Russian public, bolstering support for Putin despite the rising costs of war. Russia occasionally stages complex, attention-grabbing "warning" exercises by flexing its nuclear capability. The Arctic also serves as an important testbed for new and experimental weapon systems.

However, there is sustained evidence of unpredictable funding, extensive brain drain, and rampant corruption in the defense industry. Poor quality control leads to a series of incidents during military exercises in the Arctic, leading the Nordic countries to plan for potential environmental disasters, including those involving nuclear contamination. To lower the risks of inadvertent escalation, the Arctic states develop the Norwegian "hotline" model, currently linking Norway's Joint Operational Headquarters with the Russian Northern Fleet headquarters, as a deconfliction mechanism.

Russia could intentionally instigate provocations designed to show that it is the dominant power in the Arctic—a proposition that grows if Russia calculates that the United States and NATO are exhausted amid a long, grinding war in Ukraine.

Despite the ongoing adaptation of Russian military posture and doctrine during the war, the struggling Russian economy and consequent cuts to the defense budget prompt a debate in NATO about the severity of the Russian threat. Some allies argue that Russia is a "paper tiger," undeserving of the attention it receives especially relative to the numerous other security threats facing the alliance. They point in particular to Europe's southern periphery, where the war in Ukraine has produced knock-on consequences, including a significant uptick in migration from the Middle East and North African countries feeling the pain and some instability resulting from high food and fuel prices and other inflation.

Russian economic development in the Arctic has largely stalled. Offshore expansion projects come to a halt due to a lack of foreign investment, technical knowledge, and industrial capacity, as attempts to acquire Chinese substitutes fail. While LNG production on the Yamal Peninsula moves ahead, French company TotalEnergies has withdrawn from the project as a result of sanctions, providing an opportunity for China to step in and land a lucrative deal. Beijing also intensifies its scientific research and development and increases deployment of dual-use capabilities in the region.

The risks of transiting the NSR generate restraint among major international shipping companies. Meanwhile, construction of Russia's fleet of nuclear-powered and diesel electric icebreakers stalls, with the exception of LNG carriers servicing the Yamal project. Other infrastructure projects along the Arctic coast are likewise put on hold. The 2008 goal to transform the Arctic into Russia's "foremost strategic base for natural resources" by 2020 becomes ever more elusive.

IMPLICATIONS AND RISKS OF SCENARIO ONE

Heightened risks of escalation in the Arctic. Putin's attempt to use the Arctic as a venue to demonstrate to Russians and the broader international community that Russia is still a power to be feared is likely to increase tensions in the region. Even with Russia's economic downturn, the Kremlin may retain sufficient government resources (especially if Europe's transition away from Russian energy stalls) to sustain its activities in the region. Moreover, Putin is likely to insulate military spending from the country's broader economic contraction and may prioritize expenditures on this region, especially given the importance of the Kola Peninsula to Moscow's growing reliance on its nuclear forces.

Russia's show of force in the Arctic would likely include greater force employment and military activity in the region, including the deployment of tactical nuclear weapons on its border with Finland to show resolve as well as the testing of weapons (such as hypersonic missiles) that increase strategic ambiguity in the region. The maritime domain, where Russia still maintains strength despite some losses in the Black Sea, will become especially important, with Russia possibly choosing to forward-deploy its strategic forces to Franz Josef Land. Finally, Russian armed forces could begin to make aggressive flights with long-range aircraft launched from Russian air facilities closer to Greenland to make targeting run exercises against Thule Air Base.

Russia's more aggressive actions in the region would increase the risk of accidents and unintended escalation, including in the Baltic Sea region given Swedish and Finnish NATO membership. The lack of dialogue with Russia on Arctic matters due to the suspension of Russia's presence in the Arctic Council also heightens the risk that Russia could overreact to

incidents. Russia's increased sense of vulnerability about the state of its conventional military forces could also lower the threshold for what Russia responds to and how it responds.

Even beyond accidents and unintended escalation, it is also plausible that Russia could intentionally instigate provocations designed to show that it is the dominant power in the Arctic—a proposition that grows if Russia calculates that the United States and NATO are exhausted amid a long, grinding war in Ukraine. Some non-Arctic allies within NATO may seek to dial down tensions, especially if there is the sense that Russia is weak economically; however, others within the alliance may advocate for greater NATO pressure to confront Moscow and hold the line, sensing that now is the time to firmly push back against Russia. This could cause divisions within NATO on how to respond to a Russian provocation in the Arctic.

Demands for increased U.S. presence in the Arctic. Russia's continued efforts to sow Western disunity in this scenario may prove successful, impacting NATO cohesion. Such a situation may lead to increasing calls for bilateral commitments from the United States in the Arctic, as countries in the region worry about intra-alliance squabbles undermining their security. Arctic countries could similarly look to bilateral relationships with other military powers, particularly the United Kingdom, which has already organized a northern European regional military grouping known as the Joint Expeditionary Force (JEF).

Greater risks to commercial activity in the Arctic. As the Russian economy struggles to deal with the impact of Western sanctions, the regime may be forced to scale back its infrastructure and logistical investment in the Arctic. This could increase both the risks and the costs for nearly all commercial ventures in the region, including those by Western companies. Russia could also squeeze control of the NSR by limiting commercial opportunities there, especially for Western companies.

Greater chance of Russian mishaps and disasters in the Arctic. As Russia cuts corners in its Arctic operations to save money, various mishaps could occur, including maritime accidents, weapons tests that backfire, and nuclear contamination in the NSR from aging Russian ships powered by nuclear reactors that leak or break down.

Pressure for the United States and NATO to increase defense spending. Growing security tensions in the Arctic may increase pressure on the United States and other NATO allies to increase their defense spending to bolster their capabilities and capacity to operate in the region. This could have serious domestic repercussions, feeding existing criticisms in the U.S. of prioritizing defense spending over other urgent social necessities.

Scenario Two: Russia-China Entente

In this scenario, Putin continues to employ harsh tactics to cement his grip on power. His control over the oligarchs has tightened as a result of Western sanctions, as they face steep barriers to moving money overseas, purchasing real estate, or traveling abroad. The war in Ukraine has turned into a protracted conflict. Fear of popular unrest in Russia drives Putin's autocratic regime. New legislation passed during the war remains in place, giving the government the power to crack down harshly on any dissent. Surveillance technology imported from China has been deployed toward a form of social credit, with facial recognition software processing images from thousands of cameras that are largely concentrated in Moscow, St. Petersburg, and other major cities and transport hubs. Thousands have fled the country. Elites associated with the Russian Arctic have stayed loyal to Putin, although the prominence of the security services in the Kremlin has allowed them to gain greater control over Arctic issues. As a result, Arctic discourse in Russia has become heavily influenced not just by the military but now by the security services as well.

The Russian economy is proving resilient to sanctions, largely due to hydrocarbon and mineral exports as well as arms deals with customers outside the West. Russia has diversified its customers. While China is by far the largest investor and customer for Russian hydrocarbons, other Asian states also have notable stakes. Yamal LNG is now shipped eastward to Asia year-round. Chinese, Indian, and Vietnamese capital has replaced Western stakes in Novatek's Arctic LNG 2 project, allowing construction to move ahead. China's Development Bank and Export-Import Bank have together taken a majority stake in Novatek's Murmansk plant, where LNG platforms are constructed, as well as in the Zvezda Yard, where ice-hardened LNG tankers are built. China opens a consulate in Murmansk.

Chinese technology provides the backbone of Russian Arctic development, with Chinese-built LNG tankers plying the NSR year-round (using Russian icebreaker support in winter months). People's Republic of China (PRC) firms have also invested in and forged technology and logistics agreements with the Udokan copper project in Trans-Baikal. A joint Russia-PRC consortium of firms is developing rare earths from the palladium and platinum deposits in the Taymyr Peninsula. This project has moved ahead despite protest from the local Indigenous communities and reports of arrests and forced labor in local villages.

Although little information is available, there are indications that Russian Arctic development is having a devastating effect on the environment. Scattered reports have emerged of spills and contamination on the

ecologically significant Taymyr Peninsula. Thawing permafrost is reportedly causing problems with LNG pipelines and storage facilities in Yamal. A tanker carrying coal from the Vostok coal project in the Taymyr Peninsula eastward along the NSR to India ran into bad weather and grounded in the shallow waters of the Sannikov Strait, releasing thousands of gallons of diesel as well as tons of coal.

Criminal activity is on the rise in the Nordic region. Russia has continued its disruptive policy vis-à-vis migrants and appears to be taking a selective approach to border controls that politicizes migrants and drug smugglers as well as other illegal activity.

Russia and China have deepened their military relationship, as Putin can no longer refuse Chinese President Xi Jinping's demands to have a Chinese military presence in the Russian Arctic given the Kremlin's growing dependence on Beijing. Russia and China conduct joint air patrols and share satellite capability, and Russia allows China to build military facilities in the Arctic. China's naval engineers are building a submarine support base in the Kola Peninsula near Russia's Severodvinsk and Gadzhiyevo submarine bases. Chinese and Russian naval vessels conduct annual exercises in the Barents and Bering seas. In September 2024, Russian icebreakers escorted the first Chinese navy flotilla to transit the NSR, an operation widely covered in official media to highlight the new Russia-Chinese Agreement, which gives Chinese vessels special transit rights and privileges in the NSR.

In the United States, deep political divisions complicate attempts to respond to growing Russia-PRC ties; additionally, funding needed to strengthen U.S. forces in the Pacific competes with funding requirements to strengthen U.S. force posture in Europe. Competing domestic economic priorities have distracted attention away from Russia.

NATO continues to debate its proper role in the High North, but allied disagreement over competing threat perceptions and alliance priorities stymies progress toward deciding a NATO posture for the Arctic. Allies on the front line with Russia emphasize reinforcing the eastern flank and increasing readiness. However, southern European allies want NATO to focus on the Mediterranean, which is undergoing a migrant crisis triggered by climate-driven drought.

Finnish and Swedish accession to NATO has deepened Nordic regional defense cooperation, begun earlier with the creation of NORDEFCO. Nordic political and military leaders have met frequently, and significant Nordic military exercises continue to grow in complexity. The Norwegian model of forbidding NATO bases or nuclear weapons on Norwegian soil is now the Nordic model, with Sweden and Finland having adopted similar measures. The Nordic nations retain strong defense cooperation with both the United States (which has worked particularly closely with Sweden and Finland since 2014), as well as with the United Kingdom (through participation in the JEF).

In the Arctic, the growing frequency of maritime disasters has focused attention on the impact of climate change. In 2023, the luxury expedition ship Seabourn Pursuit foundered in an early fall storm during its maiden voyage transiting the Northwest Passage. Of the 264 passengers and 120 crew, almost all were rescued alive, many with exposure injuries. Fourteen elderly passengers died. The disaster rocked Canadian politics, shifting attention toward bolstering search and rescue capacities—and away from Russia.

Another source of regional tension relates to nuclear materials—the Comprehensive Nuclear Test Ban Treaty Organization nuclear sensors in Russia have recently begun to perform erratically, going offline for short periods of time. This has caused serious consternation within the international community, as it is believed that Moscow is deliberately turning the sensors off and on to generate anxiety.

The Arctic Council continues its work without Russia, but it has failed to produce any new international agreements of significance without Moscow. Its working groups issue reports, and meetings have restarted under Norwegian chairmanship in 2023. However, higher-level meetings are largely pro forma.

IMPLICATIONS AND RISKS OF SCENARIO TWO

Uncertain Western responses to China's increasing presence in the Arctic. China's increasing cooperation with Russia more broadly is likely to coincide with an enhanced push to increase Beijing's presence in the Arctic, including in the economic and military domains. The United States and Europe may struggle to push back against this developing influence, facing uncertainty about how to respond and becoming distracted by competing threat perceptions.

Russia going rogue. This scenario creates a high risk of accidents or misunderstandings in northern Europe. If heavy sanctions fail to turn Russia away from its aggressive trajectory, the West continues to provide significant military support for Ukraine, and China eases Russia's isolation internationally, Putin may decide to definitively turn his back on the United States and Europe. Combined with a position of impunity for Putin at home, this could lead to continual Russian provocation in the Arctic and in the Baltic Sea.

Reduced levers of Western pressure against Russia. With sanctions as a tool of coercion largely expended unsuccessfully, few options short of military action will remain for the West to exert pressure on Russia. This will make it increasingly difficult to deter or punish aggressive Russian behavior. One lever that may remain, however, is decisive action to shift Europe away from dependence on Russian energy. Given Russia's lack of market alternatives in the short term with the scale of the European gas market, a drastic phaseout of natural gas by European consumers could present an option of last resort to coerce Russia. However, successfully completing such a drastic action in the short term by EU member states is highly unlikely, and Russia knows this.

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Rising U.S. risk stemming from China's presence. A Chinese military presence (or major exercises) in the Russian Arctic or in the NSR would complicate U.S. Navy competition with the Chinese in the Indo-Pacific by adding another theater of operations—in this case the Arctic—where the U.S. Navy would have to monitor Chinese naval operations and perhaps even prepare for potential confrontation for which it is ill-prepared.

Risks of broader Russia-China cooperation. Moscow has long been intent on protecting its more dominant position relative to China in the Arctic. A change in Russia's receptivity to China in the Arctic would provide a clear signal of Russia's growing dependence on Beijing. Russia's reliance on China's investments in the Arctic could increase Russia's willingness to toe the Chinese Communist Party's line in other areas, such as Taiwan. If Russia's economic dependence on China continues to grow, Moscow will find it increasingly difficult to chart a course independent from Beijing, for fear that doing so would jeopardize the economic ties that Putin needs to sustain his economy and the stability of his regime.[4]

Scenario Three: Post-Putin Russia

Prompted by a protracted Ukraine conflict that has consumed Russian economic resources and left the military demoralized, Putin is removed from office by a coalition led by self-proclaimed "Russian patriots" in the military with support from "reform-minded" oligarchs and elements of the intelligence and security services.

A civilian government staffed by "technocrats" chosen from Russia's scientific and business community is established and announced to the world. Behind the scenes, however, the levers of power remain firmly in the hands of the military and the intelligence and security services. The civilian government "condemns" Putin's waging of aggressive war; announces an immediate end to Russian military operations in Ukraine and a phased withdrawal of Russian forces to pre-February 24, 2022, positions; and vows to cooperate with the international community to investigate allegations of war crimes committed by Russian soldiers against Ukraine. In return for these Russian actions, Moscow calls for an end to Western economic sanctions and restraint on the part of NATO.

Moscow initiates a global charm offensive to garner support for Russia's reintegration into the international community, leveraging its diplomatic and informational power. Many western European countries prove receptive and express relief, welcoming Putin's removal and determined to avoid repeating the supposed "mistakes" made in dealing with a weakened and "humiliated" Russia following the Cold War. The European Union, led by intense lobbying from Germany, begins to lift some economic sanctions despite deep concerns expressed by Poland, the Baltic States, and Romania, exposing fissures within the bloc. The United States, meanwhile, takes a "wait and see" approach on sanctions while calling for the West to remain unified.

Sweden and Finland, the two newest NATO members, have opted for the "Norwegian model" and refrained from requesting the basing of any NATO infrastructure on their territory. The new Russian government hails this decision of the "Nordic Bastion" allies and calls for NATO to similarly cease its buildup along its eastern flank, proposing a meeting of the NATO-Russia Council to discuss specific steps for deescalating security tensions. While NATO's eastern members warn that the Russians are engaging in the old Kremlin tactic of trying to divide the alliance, the prevailing sentiment among allies is that NATO must open up dialogue with the new post-Putin government.

Looking to bolster an economy weakened by sanctions and restore Russian pride damaged by the Ukraine war, the new government announces that as the world's largest Arctic state, its primary strategic focus will be the High North. The centerpiece of this strategy is an accelerated showcase effort to develop the NSR as the preeminent commercial thoroughfare of the 21st century. Moscow immediately calls for Western energy companies to join Russia in investing in the Arctic's future through joint ventures aiming to develop the region's natural resources.

Concurrent with the announcement to accelerate development of the NSR, Russia unveils an updated Arctic strategy that prioritizes the need to protect the environment of the Arctic region and address the effects of global climate change on its ecosystem. The strategy declares the Arctic region a "zone of peace," calling for demilitarization of the Arctic, greater international scientific cooperation in the region, and the reconvening of the Arctic Council.

China welcomes these moves, announcing plans to collaborate with Russia on the NSR venture as part of an effort to accelerate its own scientific and technical exploration of the region in furtherance of an "eco-friendly" Arctic. Beijing also expresses its desire to move ahead with the "Power of Siberia 2" gas pipeline, which would connect China with the gas fields currently supplying Russian natural gas to Europe.

Despite skepticism among some in the United States and Europe, Moscow's call for Western investment in Russian Arctic energy ventures resonates with some U.S. and European energy companies eager to both reestablish business relations with Moscow and blunt Chinese inroads. European efforts to reduce dependency on Russian energy supplies after the invasion of Ukraine have been uneven, resulting in higher energy prices and a significant economic slowdown, especially in Germany, Italy, and Austria. With Putin gone, calls to engage the new Russian government on energy issues gain traction, with a growing divide emerging between those who wish to "wean" Europe from Russian oil and gas and self-proclaimed "realists" arguing that the West must engage Russia on energy issues—some of whom are even calling for a revival of the Nord Stream 2 pipeline.

Shortly afterwards, Russia declares that it will strictly regulate all maritime traffic along the NSR in an effort to protect the Arctic ecosystem from environmental damage. The government justifies its right to take this action by reaffirming its long-standing claim to the NSR as an internal waterway and invoking Article 234 of the U.N. Convention on the Law of the Sea (UNCLOS). While Moscow emphasizes its benevolent intentions, alarmed U.S. officials order the Navy to undertake more frequent naval presence patrols in the Bering Strait. The Kremlin urges the United States "not to go down the path of militarizing the Arctic," stating that it will view a FONOP (freedom of navigation operation) in the NSR as a violation of national sovereignty that must be met by the Russian military.

China, while refraining from pronouncements on the legality of Russia's actions concerning the NSR (as China does not recognize Russian claims on the NSR), affirms Russia's right to address Western "incursion" along the NSR and condemns Washington's "senseless and provocative" actions, adding a reminder that the United States has not signed the UNCLOS. Meanwhile, Western satellite imagery indicates continued small-scale Arctic infrastructure buildup, including radars and coastal facilities along the NSR. This process began in April 2022 after Russia announced that the Northern Fleet would be reinforced with new troops and weapon systems.

> **Putin's departure could produce uncertain and conflicting responses. The better the Russians behave, the harder it will be to keep the alliance unified.**

While NATO expresses concerns about Russia's actions in the Arctic, its 32 members remain divided on the best way to deal with the new government, with most allies wishing to avoid a return to escalating military tensions with Russia. Overall, members lament the lack of an overarching strategy for the Arctic, despite NATO's acknowledgment of the importance of the region. There are growing discussions among the Arctic nations about whether to reconvene (without Russia) the Arctic Chiefs of Defense Forum and the Arctic Forces Security Roundtable to discuss the crisis with Russia and potentially develop "rules of the road" for military operations in the Arctic region.

IMPLICATIONS AND RISKS OF SCENARIO THREE

A fractured Western approach. Opposition to Putin and his authoritarian regime is currently a unifying force for the West. Therefore, his departure could produce uncertain and conflicting responses. The better the Russians behave, the harder it will be to keep the alliance unified. While some countries may seek to guide Russia toward democracy, others will remain skeptical of Russia's

intentions and its ability to overcome its authoritarian past. This divergence would place strains on NATO and the European Union, potentially fracturing their approaches to Russian actions, including those in the Arctic. What might be the Western response to plans by Russia to accelerate development of the NSR or to engage in more intensive natural resource extraction in the region? How would different countries react to Russian proposals to reconvene the Arctic Council, the Arctic Chiefs of Defense Forum, or the Arctic Security Forces Roundtable? In the case of divisions, Russia may seek to capitalize on them to bolster its own relative position.

Emboldened Russian behavior in the Arctic. A post-Putin Russian government may wish to make the Arctic a major strategic initiative as a means of both reestablishing Russian "pride" and rebuilding its damaged economy. This is likely to be accompanied by an increased military footprint and more aggressive Russian actions in the region. There is a risk that the United States and NATO, suffering from "Ukraine fatigue" and content with Putin being gone, will not have the will to stand up to aggressive Russian actions in the Arctic undertaken by a new government.

Additionally, an attempt by Moscow to cast its actions in the Arctic misleadingly in an eco-friendly veneer and brand the region a "zone of peace" may resonate in some Western circles, softening any pushback to aggressive Russian actions and affecting NATO's strategic and operational planning. A desire to return to Arctic "exceptionalism" could see the West ignoring Russian provocations in an effort to emphasize economic, energy, and commercial interests.

Faltering European efforts to reduce dependency on Russian energy. Under a post-Putin government, Western governments and companies may rush to reestablish energy ties with Russia to reap the potential economic benefits. Such an outcome would present risks to both energy security, given the uncertain nature and intentions of any new Russian government, and efforts to transition away from Russian fossil fuels toward cleaner energy sources.

Deepened Russia-China cooperation. In the case that the West fails to embrace the new Russian government, this could draw Moscow and Beijing closer together and open up opportunities for China to make economic, political, and security gains in the Arctic region. Additionally, Chinese support for Russia's initiatives may require the United States and NATO to adjust their calculus for the region by considering a potential Chinese military presence. Conversely, to counterbalance undue Chinese influence over Moscow, the West could give a post-Putin Russia options other than Beijing by increasing its overall Arctic cooperation with Russia.

Conclusion

The Arctic will only continue to grow in importance over the coming years due to climate change. Even before Russia's invasion of Ukraine, the region was characterized by a growing sense of competition as climate change opened access to the region's resources, with political analysts warning about a heightened risk of conflict. Tensions between Washington and Moscow were already running high, and the United States and European Arctic nations were operating in ever closer proximity to Russian forces, amplifying the risk of unintended escalation. Now, Russia's invasion of Ukraine is producing ripple effects that are altering—and further complicating—the security order and dynamics in the region. Real questions have (re)emerged about how Russia will respond to Finland and Sweden joining NATO; what the degradation of Russia's conventional forces will mean for its nuclear posture and how any change in Russia's posture will affect its actions in the Arctic; whether China will look to play a greater role in the region; and how the Kremlin could seek to use the Arctic as an opportunity to demonstrate that Russia is still a great power.

Given the uncertainty of the present period, it is difficult (and unwise) to make a single-point prediction about how Russia will approach the Arctic going forward. This report, therefore, presented three potential futures for how Russia's approach might change following its invasion of Ukraine. Although it is impossible to know for sure how dynamics in the Arctic will develop, this report bounds the problem—identifying the factors most likely to shape Russia's approach and assessing how those factors might combine to shape future reality. In this way, the goal of this report was to generate new thinking and discussion about how the war in Ukraine will shape dynamics in the Arctic with the intent of better preparing policymakers to plan for what the future might hold.

Regardless of what future unfolds, Russia will sustain its desire to be the predominant Arctic power in the 21st century. As Russia is the largest Arctic state, it cannot be ignored when it comes to Arctic matters. Now, given the changes that Russia's invasion of Ukraine has set in motion, it is critical that the United States and its Arctic allies prepare for new challenges that will arise and remain united in navigating them.

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