Pipeline Politics and the Securitization of the Northern Sea Route

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Abstract: *As climate change accelerates the melting of the Arctic ice caps, the region is again emerging as a key arena of geopolitical competition. Once described as a "zone of peace," the Arctic is currently witnessing increasing militarization and strategic rivalry among major powers. This study examines how Russia's energy infrastructure has evolved in recent years from an aspect of economic politics into a component of national security policy, centered around the importance of the Northern Sea Route (NSR). The analysis demonstrates that control over Arctic energy logistics and shipping routes has become central to Russia's security concerns, particularly following its geopolitical isolation after the invasion of Ukraine. Russia's strict enforcement of its territorial sovereignty over the NSR has heightened tensions with the United States and NATO, as competing interpretations of maritime sovereignty challenge existing norms under the United Nations Convention on the Law of the Sea (UNCLOS). At the same time, China has overtly expressed its Arctic ambitions, through its self-identification as a "near-Arctic state", and investment of significant resources in the development of the Polar Silk Road. These converging interests contribute to the emergence of a coalition-based bipolarity in the Arctic, with NATO on one side and a Sino-Russian bloc on the other. By linking energy infrastructure to regional security dynamics, this study offers new insights into the ways economic and strategic interests intersect in the high north, demonstrating how infrastructure can serve as both a geopolitical instrument and a catalyst for systemic change in Arctic security relations.*

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Keywords: Arctic Security; Sino-Russian Relations; Northern Sea Route; Energy Politics; Regional Security Complex

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Introduction

With the northern ice caps melting at an unprecedented speed, the Arctic is again emerging as a stage for geopolitical competition. Once envisioned as a "zone of peace," the region is witnessing significant militarization, and the regional rivalry is stronger than ever in the post-Cold War era. This paper conceptualizes Russia's energy infrastructure not merely as a tool of economic

statecraft, but as an instrument of security policy, wherein control over energy infrastructure becomes framed as a matter of national security. Thus, the research question this paper aims to answer is: What is the primary driver behind the increased securitization of the Northern Sea Route (NSR)?

As Russia turns eastward following its isolation from the West, and China continues to expand its Arctic footprint, the region is transforming. The increased importance of Russia's alternative export channels following the invasion of Ukraine, combined with the increasingly close-knit relationship between Russia and China in the Arctic, suggests that the region is increasingly characterized by a form of coalition bipolarity, with a strengthened NATO on one side and a deepening Sino-Russian partnership on the other.

The analysis presented here is divided into 3 sections. First, it outlines the regional makeup and the key security issues relevant to this paper's analysis, as well the evolution of Arctic securitization from the Cold War to the present. Second, it analyses Russia's changing energy politics and its implications for regional and domestic security, alongside an overview of Chinese Arctic policy and efforts to restructure the regional order to gain increased influence and legitimacy. Finally, the paper assesses how NATO members perceive the changing Arctic security landscape and considers the implications this might have for the future of the Arctic.

Background

THE REGIONAL MAKEUP:

The Arctic is the northernmost region of the globe, extending from the Arctic Circle to the North Pole. It encompasses eight countries: the US, Canada, Iceland, Denmark, Norway, Sweden, Finland, and Russia. Although all countries have a vested interest in the region, only five countries have Exclusive Economic Zones (EEZ) in the Arctic Sea: the US, Canada, Denmark, Norway, and Russia. These are the countries most relevant for the discussion of this paper, as the most pressing security concerns in the region are maritime-based.

These EEZs play an important role in defining the security interests of each regional actor. According to the United Nations Convention on the Law of the Sea (UNCLOS), a country enjoys sovereign rights over all resources within its EEZ.[1] This includes both living resources, such as fisheries, and non-living resources, such as minerals and fossil fuels. Fossil fuels, specifically offshore oil and gas reserves, could potentially play a significant role in determining the Arctic security issues for decades to come. It is estimated that 13% of the

world's undiscovered oil reserves and 30% of the world's undiscovered gas reserves are located in the Arctic, 84% being offshore.[2] As the world's finite supply of oil and gas eventually dries up, the Arctic could end up becoming one of the last frontiers of fossil fuel extraction. On the other hand, some authors have firmly rejected the idea of the Arctic being the stage for 'resource wars' due to the resources all lying within the countries' EEZs.[3] Then again, as is the nature of undiscovered resources, it has yet to be ascertained where exactly they are located. Additionally, there have already been proposals for arctic offshore resource extraction projects in Russia.[4] Thus, the extent of these resources and the implications they will have for regional security remain to be seen.

Given the relative lack of land borders between regional actors, the Arctic is unique as a region. The lack of land borders, however, does not diminish the security interlinkage of the region. On the contrary, given the speed at which the region is geologically changing through the melting of the ice caps, this interlinkage is particularly prominent. As such, for the basis of this article, the Arctic will be viewed as being a Regional Security Complex (RSC). According to Barry Buzan, Ole Wæver, and Jaap de Wilde, an RSC is defined as: "a set of states whose major security perceptions and concerns are so interlinked that their national security problems cannot reasonably be analyzed or resolved apart from one another."[5] This perspective will serve as the foundation of this paper's analysis.

ARCTIC SECURITIZATION

The modern timeline of Arctic securitization can be seen in three parts: Cold War era securitization, post-Cold War desecuritization, and in recent years a *re*-securitization.[6] During the Cold War the Soviet Union undertook significant militarization efforts in the Arctic, building several remote airbases far north in the Arctic, and stationing the Northern Fleet with its nuclear submarines on the Kola Peninsula. Being the shortest distance between the two superpowers, the Arctic was mainly viewed as a potential theater of nuclear exchange.[7] As such there was little to no nuance on the topic of Arctic security issues. Military security issues, particularly the threat of transpolar Intercontinental Ballistic Missiles (ICBMs), took precedence over everything.

However, during the final years of the Soviet Union in the late 80s, the rhetoric started to change. The Arctic saw a wave of desecuritization attempts, most notable of which was the Murmansk Initiative. In October 1987 in Murmansk, then General Secretary of the Communist Party of the Soviet Union Mikhail Gorbachev proposed several adjustments to the Soviet Arctic foreign policy. In strong contrast to his predecessors, Gorbachev proclaimed: "Let the Arctic become a zone of peace." Specifically, he proposed the denuclearization of the Arctic, cooperation on the rights of Arctic indigenous groups, as well as

the creation of an international Arctic scientific cooperative.[9] Shortly after, the Soviet Union fell, and the great power rivalry of the Cold War was no more. In 1996, the Arctic Council was formed to facilitate cross-arctic cooperation, echoing the sentiments of Gorbachev's Murmansk Initiative. Indeed, the hope of the Arctic becoming a region shaped by amiable relationships of cooperation had never been higher.

However, such desecuritization efforts did not last. The Russian military has undergone significant modernization since 2009, completely overhauling its military bureaucracy and reopening and renovating tens of Soviet-era military bases in the Arctic.[10] Russian remilitarization of the Arctic is shaped by security concerns different from those during the Cold War. No longer are transpolar ICBMs crossing longitudinal axes the sole security concern; instead, Russian security concerns now center on latitudinal axes and key infrastructure along the Russian Arctic coast, most notably Arctic oil and gas fields and the Northern Sea Route (NSR).[11]

More recently, the most outspoken state actor linking the Arctic to national security has been US President Donald Trump. Throughout the first year of his second term in office, Trump has repeatedly emphasized the importance of the US assuming sovereignty over Greenland, stating in March 2025: "We need Greenland for international safety and security. We need it. We have to have it."[12] This statement aligns with what Buzan, Wæver and de Wilde define as a securitization attempt; there's a clear speech act that frames the issue as something of national security importance, and it "effects interunit relations by breaking rules."[13] By publicly framing the acquisition of sovereign territory belonging to a NATO ally as a national security necessity, Trump's rhetoric departs from established post-World War II norms governing territorial sovereignty and alliance relations.[14] Danish Foreign Minister, Lars Løkke Rasmussen, said on Danish national TV in response to Trump's comments: " […] we cannot accept actions that undermine our territorial sovereignty", highlighting their opposite positions on this issue.[15]

This historical and modern overview of Arctic securitization lends further support to conceptualizing the Arctic as a Regional Security Complex, in which security issues and securitization attempts of one state have a significant impact on other states, often invoking a response and potentially altering regional security dynamics. Within this framework, Russia's remilitarization of the Arctic and increased maritime and aerial patrolling contribute to heightened threat perceptions in the United States, which in turn has articulated a counter-securitizing discourse framing Greenland as vital to US national security. Denmark, conversely, interprets such rhetoric as a threat to its territorial sovereignty and has responded by re-emphasizing its commitment to Greenland. The interaction illustrates how, in an Arctic RSC, securitization processes are

mutually reinforcing rather than isolated, producing cascading effects across multiple actors.

Pipeline Politics and the Securitiation of the Northern Sea Route

Three major Arctic shipping routes have been proposed: the Northern Sea Route (NSR), the Northwest Passage (NWP), and the Transpolar Sea Route. However, due to the uneven thickness of the Arctic ice caps and the speed at which they will melt, the former two will likely reach commercial viability first, with the NSR having seen the most use and infrastructure development.[16] The NSR is of particular geopolitical interest due to its increasing importance to the Russian economy and the disputed sovereignty of the route. Russia claims sovereignty over the route and considers it internal waters, requiring foreign ships to notify Russian authorities 45 days before using the route, and undergo mandatory escort by Russian icebreakers at high costs. Several Western countries have claimed this is in breach of UNCLOS Article 87, which states that all countries enjoy freedom of navigation within the EEZs of other states.[17] The elevated role of the NSR in Russia's export industry links energy logistics to its broader security posture. Disagreements over territorial sovereignty have transformed the NSR from a matter of domestic economic and energy politics into one of national security, transcending the traditional boundary between politics and security.

RUSSIA'S ARCTIC SECURITY INTERESTS

After Russia's full-scale invasion of Ukraine in February 2022, the securitization of the NSR has become increasingly more pertinent. This securitization is tied to the phenomenon of 'pipeline diplomacy' or 'pipeline politics', the use of gas pipelines as an instrument of foreign policy and strategic influence.[18] Prior to the invasion, the EU was Russia's single largest export market for oil and gas, primarily supplied through an extensive network of gas pipelines. However, the Nord Stream 1 pipeline, which runs from Russia to Germany through the Baltic Sea, halted operations indefinitely in August 2022. Nord Stream 2 never entered service due to the invasion, and the Yamal-Europe pipeline running through Belarus ceased deliveries in September 2022.[19] Following the imposition of Western sanctions on Russian oil and gas, Russia pivoted towards Asia to substitute its European market. As a result, India and China emerged as the primary buyers of Russian fossil fuels.

Figure 3.1 - Russian pipeline infrastructure

One of the key implications of this eastward shift in export is the increasing reliance on tankers as a method of exportation. The existing pipeline infrastructure between Russia and both India and China comes in the form of only one pipeline: the Power of Siberia. As shown in Figure 3.1, the Power of Siberia pipeline only connects China to the Chayanda field in Central Siberia and not the largest Arctic oil fields situated around the Yamal peninsula. The Power of Siberia 2 connecting China directly with the Yamal LNG megaproject has been proposed to address this, although negotiations have stalled around Beijing's price demands.[20] India on the other hand, has no existing pipeline connection to Russia, with none in the works either, meaning Russia remains completely reliant on tankers to export its fossil fuel to India. The shortest route from the Yamal LNG gas field to India and China by tankers is through the NSR, highlighting its significant role in the economic security policies of Russia.

Russian President Vladimir Putin has repeatedly emphasized the importance of the NSR to Russia's Arctic ambitions. In a 2024 speech at the 9th Eastern Economic Forum, he listed several aspects of Russia's large-scale plan for the development of the NSR, including expanding the already world-leading fleet of icebreakers to include 5 more nuclear-powered icebreakers, expanding the satellite network over the Arctic, and investing in both civilian and military infrastructure along the Russian Arctic coast.[21]

Russia's official rhetoric around the security of the NSR is particularly clear in its Arctic Policy 2035 paper, where it introduced several new key points of Russian Arctic security interests, most notable of which was "to ensure Russia's sovereignty and territorial integrity."[22] This point is significant due to the

contentious nature of Russia's claims. Russia's sovereign claims over the NSR and its imposing of strict limitations and regulations for traversing the route has been highly criticized by the US, who claim that enforcing maritime sovereignty in this way directly contradicts the freedom of navigation guaranteed in the UNCLOS.[23] [24] The US has expressed the intention to challenge what they perceive as "excessive maritime claims," an obvious jab at Russia regarding the conflicting views on the extent of territorial sovereignty along the NSR.[25] This perceived challenge to Russian authority has amplified Russia's security concerns along the NSR, leading to major investments in Arctic infrastructure that increasingly depend on Chinese involvement.

CHINA'S ARCTIC AMBITIONS:

China first announced its Arctic ambitions in 2018. In a white paper published by the State Council Information Office of the People's Republic of China (PRC), it classifies itself as a "near-arctic state", in an attempt to legitimize its interests in the region.[26] China has pursued the right to navigation, scientific research, invested significantly in infrastructure development, and more. It has established research stations on Norway's Arctic archipelago of Svalbard and on Iceland. The flagship project of China's Arctic ambitions, however, is the Polar Silk Road (PSR).

An extension of the Belt and Road Initiative (BRI), the PSR has been domestically defined as "the shipping route that crosses the Arctic Circle to connect the economic centers of North America, East Asia, and Western Europe."[27] This definition inherently links the PSR to the NSR, as currently any shipping routes crossing the Arctic would make use of the NSR. The first commercial Chinese voyage through the NSR was completed in 2013, when the vessel "Yong Sheng", owned by the Chinese shipping conglomerate COSCO, arrived in Rotterdam, having set off from the northeastern Chinese port of Dalian 35 days earlier.[28] This voyage shortened the travel time by around 13 days compared to the traditional Suez Canal route.

A shift away from an overreliance on the Suez Canal might be another reason for the development of the PSR. The 2021 Suez Canal obstruction, when a container ship blocked the canal for several days, highlighted just how fragile the traditional Asia-Europe shipping route is. Additionally, 80% of Chinese oil imports are transported through the strait of Malacca between Malaysia and Indonesia, a strait that could be blocked by the US in case of a conflict.[29] The PSR represents a shift away from transportation through these straits where China and its allies have limited political and military influence, and into one where it can more confidently enforce its economic security interests.

Another sign of the Arctic Sino-Russian partnership growing stronger is Chi-

nese investment in Russian Arctic oil and gas extraction. Chinese companies currently own a 39.9% stake in the Yamal LNG megaproject, as well as 20% of the Arctic LNG 2 field.[30] After European companies withdrew their investments in these projects, China became the largest foreign investor in Russian arctic oil and gas projects. With these investments, China is both deepening its partnership with Russia and further legitimizing its interests in the region.

NATO's Response to Sino-Russian Arctic Cooperation

NATO countries remain wary of China's increased involvement in the Arctic. Although China already operates research stations in Norway and Iceland, the fear of dual-use infrastructure means NATOs Arctic members remain skeptical of such investments. The Swedish Space Corporation decided not to renew its contract with Chinese partners for ground stations in Kiruna within the Swedish Arctic over fears that it could be used for military intelligence gathering and surveillance.[31] As part of its PSR project, China has also shown interest in the creation of an "Arctic corridor," a plan to transform the Northern Norwegian port of Kirkenes into a deep-sea port and connect it to Rovaniemi in Finland through an Arctic railway.[32] As part of this "Arctic corridor," China has attempted to acquire a stake in said seaport in Kirkenes, Norway, as well as an airport in Finland, both of which have been blocked by the Norwegian and the Finnish government respectively.[33]

China's efforts to acquire property and infrastructure in the Arctic have raised concerns that it is employing the same tactics as those used to legitimize its claims in the South China Sea. Former US Secretary of State Mike Pompeo warned that China is trying to transform the Arctic into a new South China Sea with widespread militarization and competing territorial claims.[34] Although this statement might be overblown, as China has no semi-legitimate grounds to make territorial claims in the Arctic, it paints a poignant picture of the Western perception of Chinese expansionism in the Arctic.

This rhetoric of protecting the liberal international order against Russian and Chinese pressure in the Arctic has been a trend in recent years. In 2024, the US, Canada, and Finland, signed the Icebreaker Collaboration Effort (ICE) pact, an initiative to jointly produce polar icebreakers. In the joint statement put out by the countries, they stressed that their partnership goes beyond just building icebreakers, saying it will "also enable like-minded nations to uphold international rules, norms, and standards, ensuring peace and stability in the Arctic […]."[35] The wording of 'like-minded nations' draws a distinction between the Western NATO allies and their Arctic rivals Russia and China.

The PRC's interests in the Arctic seem to align with what Buzan, Wæver, and de Wilde referred to as 'external transformation'. A major state like China

inserting itself into the Arctic could lead to an expansion of the region's border, not in the literal sense, but rather in a way that China's actions have a profound impact on other Arctic states' foreign policy, as is evident in the frequent mentioning of China as a threat to regional stability and security. This is precisely what is meant by external transformation, as such a change is certain to have "a substantial impact on both the distribution of power and the pattern of amity and enmity."[36]

Conclusion

This paper has shown that the heightened securitization of the NSR is primarily driven by Russia's isolation from the West and its consequent eastern pivot. It is in this context that a causal chain can be identified. Russia's invasion of Ukraine and the subsequent energy boycott by European countries serve as a trigger. In response to this isolation and the closure of several gas pipelines, Russia turned toward large Asian countries as customers, specifically China and India. Given the lack of pipeline infrastructure to these countries, and the location of the largest Russian oil and gas fields in the Arctic, this infrastructural dependence on the NSR becomes a mechanism of securitization. The outcome of this process is that Russia has continued to renovate Arctic naval bases, air bases, and dual-use facilities along the NSR.

Additionally, China has stepped in as a major investor in many of the commercial projects along the NSR, thereby amplifying the securitization of the route through Russia's financial dependence on China. This investment is part of China's Polar Silk Road, ultimately serving as a tool to legitimize its presence and interests in the region. China has thus assumed the role of an external transformer, seeking to alter the distribution of power in the Arctic.

In 2025, through U.S. President Donald Trump's comments on Greenland, the securitization of the Arctic also received a push from the U.S. side. Viewing the increased presence of Russia and China as a clear threat, the acquisition of Greenland has been framed as a matter of national security. The United States and NATO have expressed strong skepticism toward Chinese involvement in the Arctic, using the terminology "like-minded nations" to draw a distinction from China.

The causal links between this set of events point to the clearly interlinked nature of the Arctic as a region, thus reinforcing its categorization as a Regional Security Complex. Given the accelerating accessibility of the region and the geopolitical interest it has garnered, the dynamics identified in this paper suggest the possibility of continued securitization of the Arctic. While the long-term role of natural resources in the region remains uncertain, the findings demonstrate that, when faced with external pressure and infrastructur-

al dependency, energy politics can become an object of securitization, even in regions previously considered peripheral. These dynamics increasingly manifest at the systemic level, contributing to an emerging pattern of bipolarity in the Arctic, with a NATO coalition on one side and a Sino-Russian partnership on the other.

This paper also points to several avenues for future research. The only shipping route case study considered in this paper is the NSR; thus, a comparative study of the Northwest Passage (NWP) could help assess whether such infrastructure-driven securitization extends beyond the NSR. Given that this is still an early-stage dynamic in the region, the long-term impact on the structure of the Arctic remains unclear. Longitudinal analyses could eventually explore whether the trend of securitization in the Arctic leads to sustained bipolarization or stabilizes into managed competition over time.

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