



NARRATING THE ARCTIC: A CONTEXTUALISATION OF 3 MAIN CLAIMS ABOUT THE ARCTIC IN POPULAR NARRATIVES

Regional Update Arctic | The Arctic as a region has lately gained increased international attention, not just in the context of the Trump administration's renewed interest (read: threats) towards Greenland, but more broadly the region is seen as a new epicentre of geopolitics. The reasons for this growing interest seem diverse and at times intransparent, and there exist different theories to explain the renewed relevance of arctic regions in the geopolitical discourse, from emerging trade routes and resource extraction to military-strategic relevance based on geography.

This first article of the Arctic-series aims to contextualise the increased international interest in the Arctic region, uncover some myths and semi-truths about popular narratives about the Arctic and to set the stage for following geopolitical analyses. It asks: To what extent is the Arctic a Geopolitical Epicentre? And if it is, why?

Claim 1: The Arctic has vast amounts of untapped oil, gas and mineral resources that powers are now fighting to control

When citing the Arctic's geopolitical relevance, many sources point to the region's vast and untapped potential of natural resources. This narrative, however, requires contextualisation:

The Arctic is not a homogenous region, especially when it comes to extractive industries. Local conditions determine the feasibility of drilling and mining, which is why Norway, the US and Russia have been able to exploit Arctic oil resources at scale, whereas northern Canada abandoned Arctic offshore drilling in the early 2000s, and Greenland never developed a national oil and gas industry. In fact, Greenland's government even banned oil and gas exploration altogether in 2021, arguing that the environmental and economic costs were too high. Even in Alaska, major pipelines now operate at less than a quarter of their capacity, partly due to the rise of fracking in the contiguous U.S.

Plans for increased oil and gas extraction are therefore unlikely to explain the renewed geopolitical attention on the Arctic, critical minerals and rare earth elements (REE) are more plausible drivers. While Arctic resources have been tapped for centuries, the green energy transition has intensified global demand for minerals such as lithium and REEs found in Greenland. The island's REE reserves of ca 1.5 million tons match the U.S. 1.9 million tons, yet are vastly more compressed on territorial scale, making these resources non-negligible, as Arctic researcher Lukas Wahden points out. However, "either of these are a fraction of China's proven 44 million tons, or Russia's (supposed) 28 million. U.S. reserves can't currently cover domestic demand, so there's an inherent incentive towards expansion, but the true bottleneck isn't really the size of deposits, it is refinement capacities, of which China holds at least 90%, and has lower environmental standards, cheaper labour and decades worth of state subsidies. The U.S. and others can't replicate these conditions easily, quickly and at scale." Against this backdrop, the EU and U.S. have signed Memoranda of Understanding with Greenland to support the development of critical raw material value chains, but, as Wahden points out, it remains a misconception "to assume that Arctic resources are extractible at competitive cost levels" compared to China. Furthermore, given the realities of harsh weather conditions and lacking infrastructure in many Arctic regions, "it remains difficult to move large commercial investors to invest in government-pushed projects." Ultimately, the Arctic's resource potential may be geopolitically symbolic, but regional and structural constraints limit extraction capacity significantly.



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Claim 2: The Arctic ice is melting, and soon cargo vessels will be able to transport goods through the Arctic on a large scale - whoever controls the Arctic, controls global trade.

Roughly 90% of global trade is transported by sea, so the reported 40% increase in ships entering the Arctic Polar Code area over the past decade has generated considerable enthusiasm. As rising temperatures make Arctic waters more accessible, new Arctic trade routes are expected to reduce travel times between Europe and Asia and bypass geopolitical chokepoints such as the Suez Canal and the Malacca Strait. China, Arctic Council Observer state since 2013, formally embraced this potential in 2018 by incorporating the Arctic into its Belt and Road Initiative under the label “Polar Silk Road.” A recent voyage by the Chinese cargo vessel Istanbul Bridge along the Russian-controlled Northern Sea Route (NSR) reportedly halved transit time compared to southern routes, reaching the UK in 20 days.

Despite the reported 50% time reduction, the NSR usage is constrained by numerous obstacles: As Mark Drinkwater, former director of ESA’s Earth and Mission Science Division points out, the NSR remains a niche, seasonal corridor. “Currently, many people view the NSR-project with a huge degree of optimism, but in reality the establishment of regular commercial use of this route lies quite far in the future.” Reduced transit time is often offset by higher insurance premiums, the need for (nuclear) icebreaker escorts, and unpredictable weather conditions that limit reliability. Recent incidents involving Russian vessels trapped in Arctic ice, like the shadow-fleet LNG carrier Lynx in 2025, showcase operational risks. The Russian authorities’ negligence concerning the high risks connected to Arctic shipping poses a threat to the crews of the vessels, but also to the Arctic environment, as accidents and oil spillages in the high north cannot be addressed with the same search and rescue infrastructure as in the south.

While Arctic shipping is growing, it is unlikely to replace southern corridors in the foreseeable future. Its significance is therefore less commercial than strategic. In Russia and China’s vision, northern routes offer a way to reduce dependence on US-influenced maritime chokepoints. In turn, this dynamic may help explain Washington’s renewed attention to Greenland and the broader Arctic region.

Claim 3: The Arctic is located at a crucial point for defense and power struggle. Its geography determines great power conflict lines.

The history of Arctic geopolitics in the second half of the 20th century can be seen as a story of alternation. During a period of Arctic exceptionalism from the late 1980s to the early 2000s, it was widely believed that the region’s harsh conditions would prompt cooperation even between former enemies like the US and the Soviet Union - a belief that took its last blow with the beginning of the Russian invasion of Ukraine. Long before that, a gradual militarisation in the region, marked by individual events like the placement of a Russian flag on the seabed under the North Pole in 2007, or the relocation of Norway’s military headquarters to Bodø in 2009 slowly rang in a new age of competition in the Arctic.

In the following years, Arctic as well as non-Arctic states drastically increased their military presence in the north. Joint Russian-Chinese military exercises in the Arctic and heightened Russian military activity as well as growing NATO-presence are markers of the military strategic interest in the Arctic.



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However, The Arctic's geopolitical importance cannot be understood through geography alone: As Arctic and geopolitics researcher Dr. Eda Ayaydin points out, "Once actors begin to frame the Arctic as strategically significant, investments increase (military exercises, infrastructure, icebreaker fleets, diplomatic rhetoric). Those actions then serve as evidence that the region is "militarising," which further justifies strategic attention. This creates a feedback loop, not because geography changed, but because political meaning did."

Conclusion

The Arctic is increasingly framed as a geopolitical epicentre, yet much of this perception rests on simplified narratives. Resource wealth, emerging shipping routes and renewed military activity undoubtedly attract global attention, but material constraints remain significant. This increased interest itself alters the realities on the ground, in a self-reinforcing cycle of growing attention and militarisation. However, many contemporary analyses neglect the role of long-term developments and regional limitations that greatly influence trade, militarisation and resource extraction in the region. After all, even if Arctic Exceptionalism is declining, the Arctic remains an exceptional region.