



From Gibraltar to the Arctic

Why the Arctic Cannot Wait for the Governance of Tomorrow

Maria Elena Ahner,

(Copenhagen-based GAFG Head of Coherence & Control)

Copyright @ www.ifimes.org/dessa (posted at rieas web site (www.rieas.gr) on 27 July 2026

Note: The article reflects the opinion of the author and not necessarily the views of the Research Institute for European and American Studies

For much of the past three years, Europe's strategic attention has been fixed further south. The Red Sea crisis, instability around the Strait of Hormuz, recurring disruptions at the Suez Canal and Eastern European calamities Ukraine have understandably dominated maritime policy. In the process, the Arctic has quietly slipped down the political agenda. That is a strategic mistake.

The Arctic is often portrayed as a region whose significance belongs to some distant future, to be addressed once geopolitical or climate tensions subside. Yet history suggests precisely the opposite. The most consequential governance decisions are rarely made when new realities fully emerge; they are made years beforehand. By the time commercial opportunities become obvious, institutional choices have already been taken—or neglected.

Nearly two decades ago, Professor Anis H. Bajrektarević argued that the melting Arctic should not be understood merely as an environmental phenomenon. Rather, it represented the emergence of a new geopolitical and geo-economic space in which climate, commerce, sovereignty and security would increasingly converge. At the time, this appeared a forward-looking proposition. Today it reads less as a prediction than as a description of reality.

The question confronting the EU and the rest of Europe is therefore no longer whether the Arctic will matter. It already does. The real question is whether Europe is preparing the governance architecture required to manage its long-term implications.

Until recently, the Northern Sea Route—often referred to as the North Passage—was increasingly discussed as a viable complement to the traditional maritime routes linking Europe and Asia. Retreating sea ice, advances in navigation technology and the prospect of significantly shorter transit times encouraged governments and shipping companies alike to explore its commercial potential. While few believed Arctic shipping would replace the Suez Canal, many recognised that it

could eventually become an important element in a more diversified and resilient global trading system.

Then geopolitics intervened: The war in Ukraine fundamentally transformed Europe's relationship with the Arctic. Trade wars, military tensions and the collapse of political trust have severely constrained practical cooperation across the High North (Arctic/Litoral 5). Since much of the Northern Sea Route to Asia remains under Russian jurisdiction, European commercial engagement (even with the Canada's Hudson Bay) has become increasingly uncertain. As a consequence, strategic debate has largely shifted elsewhere.

This change in political circumstances, however, should not be mistaken for a reduction in the Arctic's strategic importance.

Climate change has not paused because diplomacy has stalled. Arctic ice continues to retreat. Technological innovation continues to reshape maritime navigation. The global race for critical minerals continues to intensify – so does the calamity all over West Asia. Scientific research continues to reveal the region's growing environmental and economic importance. Whether relations between Europe and Russia improve next year or in the next decade, these structural transformations will continue.

The Arctic therefore represents one of the rare geopolitical theatres where long-term trends are advancing independently of short-term politics. Canadians and Americans are understanding it well. That distinction matters because infrastructure can be built relatively quickly; institutions cannot.

Europe has devoted considerable attention to strengthening supply chains, modernising ports, improving digital logistics and enhancing maritime resilience. These are essential investments. Yet physical infrastructure alone cannot govern an increasingly complex maritime domain.

The Arctic presents questions that extend well beyond navigation. They concern environmental protection, search and rescue capabilities, digital maritime services, subsea infrastructure, energy security, scientific cooperation, resource management, indigenous communities and the legal frameworks governing international waters. Above all, they concern the ability of states to cooperate under conditions of growing strategic competition.

These are governance challenges long before they become commercial ones. History repeatedly demonstrates that institutional responses tend to lag behind technological and geopolitical transformation. New shipping routes emerge faster than regulatory systems. Commercial interests expand more rapidly than mechanisms for international cooperation. Competition develops long before governance adapts. The Arctic is unlikely to prove an exception.

Waiting for political conditions to improve before preparing governance frameworks would therefore reverse the proper sequence of strategic planning. Institutions should not be improvised once new patterns of trade emerge. They should be designed while options remain open. For Europe,

this requires abandoning an increasingly outdated habit of treating the Arctic as an isolated frontier rather than as an integral component of its wider maritime strategy.

Developments in the High North are no longer detached from the EU/Europe's broader strategic environment. Disruptions affecting southern maritime corridors inevitably reinforce interest in northern alternatives (especially under the current situation when the fast and cheap blue and green lanes – such as the trans-Siberian, Hormuz-Red Sea-Suez, or Africa corridor are under question). Likewise, future changes in Arctic navigation will influence Europe's long-term connectivity, supply-chain resilience and economic security. The Arctic should therefore be viewed not as a distant (mental, geographic or political) periphery but as part of a wider maritime system whose resilience depends less on any single route than on the quality of governance that connects them (see GAFG Connectivity Doctrine).

This carries particular significance for the Nordic countries (not only the Arctic 5). Their geographic proximity gives them an immediate stake in the Arctic's future, but the implications extend well beyond Northern Europe. The EU (led by Denmark for that matter), Britain and other Atlantic partners all share an interest in ensuring that future Arctic governance is based on cooperation, predictability and internationally accepted (UNCLOS-based) rules rather than strategic improvisation.

Preparing for that future does not require predicting when the Northern Sea Route will once again become commercially attractive. Such forecasts remain hostage to political developments beyond anyone's control. It requires something more fundamental: recognising that governance must precede opportunity.

This is precisely the rationale behind the **Global Maritime Governance Forum of the Global Academy for Future Governance (GAFG)**, whose inaugural meeting is planned for Gibraltar this September. Rather than becoming another conference on shipping, ports or maritime security, the GAFG Forum seeks to establish a permanent international platform where policymakers, port authorities, industry leaders, insurers, academics and international organisations can jointly examine the governance of an increasingly interconnected maritime system. At a time when the Arctic is becoming strategically more significant even as political cooperation grows more difficult, such dialogue is not a luxury—it is an investment in institutional preparedness. Its ambition is simple but timely: to begin shaping the governance architecture before changing geopolitical realities make it indispensable.

Europe should therefore resist the temptation to postpone its Arctic thinking until relations with Russia eventually stabilise. Strategic foresight cannot depend upon diplomatic timing. The Arctic will continue to evolve regardless of political cycles, because the forces transforming it—climate change, technological innovation, resource competition and shifting patterns of global trade—operate on a different timeline.

The greatest strategic mistake would not be failing to predict precisely when the Arctic will become Europe's next great maritime frontier. It would be waiting until that moment arrives before

preparing the institutions capable of governing it. The Arctic is not waiting for Europe to prepare. Neither should Europe wait to govern the Arctic.

Selected References

Bajrektarević, A. H. (2011). *The Melting Poles: Between Challenges and Opportunities*. Central European Journal of International and Security Studies (CEJISS), 5(3), 22–43.

Arctic Council. *Arctic Marine Shipping Assessment (AMSA)*. 2009. <https://pame.is/projects/arctic-marine-shipping/amsa>

European Commission & European External Action Service. (2021). JOIN(2021) 27 final. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=JOIN:2021:27:FIN>

International Maritime Organization (IMO). <https://www.imo.org>

United Nations Convention on the Law of the Sea (UNCLOS). <https://www.un.org/depts/los/>

OECD. (2023) *The Ocean Economy to 2050* <https://www.oecd.org/ocean/>

World Bank. *The Container Port Performance Index (CPPI)*. www.worldbank.org/ext/

UNCTAD. *Review of Maritime Transport 2024* <https://unctad.org>

Global Academy for Future Governance (GAFG). *Connectivity Doctrine*. (Internal policy document.)