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The Arctic Barometer: Measuring Expert Predictions on the Arctic Region

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Making predictions in a highly uncertain environment is always a hazardous enterprise. Confronted with global warming, the future of the Arctic region has been often debated, both in terms of the scope and the speed of expected changes, including the future of resource development, the opening of shipping routes, and the evolution of multilateral fora. These predictions have come from different sources: governments through different policy papers and statements, the media, civil society, and academics, to name but a few. It can be difficult to account for this vast and diverse array of predictions, considering that each actor has interests to promote.

We decided to develop a survey asking different actors to make predictions about possible Arctic geopolitical developments. Instead of letting individuals make their own predictions on the topic of their choice, we selected plausible scenarios and prompted respondents to evaluate if these developments were likely or unlikely to happen. Scenarios were developed to be both visible and concrete: we can evaluate if the scenario unfolded or not during a certain time period. For example, we can observe if Russia violated the airspace of another Arctic state, if Greenland reached state sovereignty, or if the U.S. deployed a freedom of navigation operations in the Arctic region. In total, our scenarios covered two dimensions: governance and security. On governance, potential developments around diplomatic initiatives or multilateral cooperation were tested. On security, the possibility of military conflict in the region or of military intrusions were considered.

Two main objectives justified this approach. First, we wanted to evaluate if experts were correct in their predictions. Related to this, we were curious to know which type of issues caused incorrect assessments. Second, we repeated the same scenarios in multiple waves: the objective was to analyze if specific geopolitical developments occurring between waves would change predictions, moving the needle on experts' predictions.

[Interrogating experts](#)

We developed an online survey and reached out to Arctic experts to answer it. Wave 1 of this survey was conducted in June 2022, wave 2 in January 2023, and wave 3 in September 2023.¹ In total, we gathered 69 responses for wave 1, 60 for wave 2, and 48 for wave 3.

Respondents were tasked with assessing if specific geopolitical Arctic developments were likely or unlikely to happen by a certain date. Hence, they had to evaluate the likelihood of a development

occurring by giving a number from 0 (highly unlikely, will not happen) to 100 (high likely, will happen). Only numerical answers were recorded for analytical purposes. Now, let's turn to our first question: did geopolitical assessments change from June 2022 to September 2023?

Change and continuity in Arctic predictions

The first wave of the Arctic Barometer was conducted four months after the start of the Russian invasion of Ukraine. As such, it strove to capture the areas of convergence and divergence on the future of the Arctic region after this major geopolitical development. Of course, the invasion caused shockwaves in Arctic governance: seven of the Arctic states paused their participation in Arctic Council activities until mid-June 2022 and only partially resumed their participation afterwards.² Bilateral relations between Russia and the other Arctic states were severely impacted, and other organizations, such as the Barents Euro-Arctic region, paused their partnerships with Russia.

Respondents in waves 1 and 2 were not optimistic that cooperation would resume shortly at the Arctic Council (see figure 1).

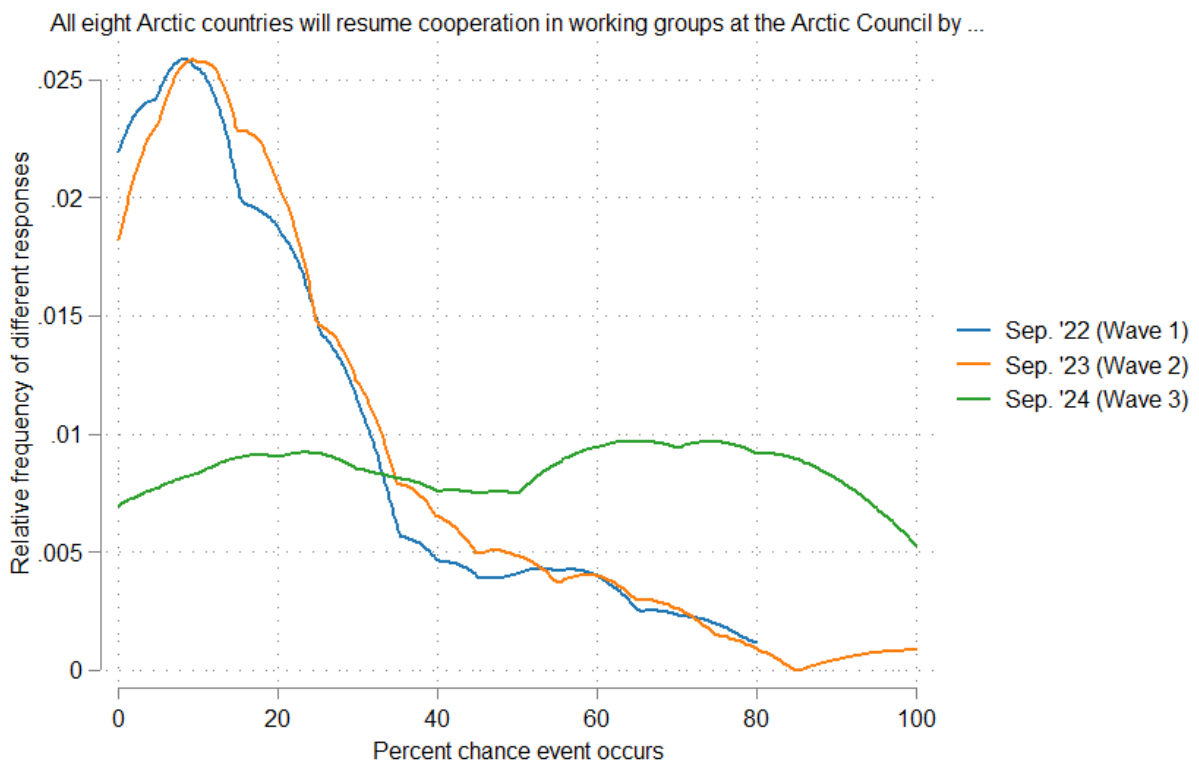


Figure 1: Distribution of assessments of respondents on resumption of Arctic Council activities.

Note on the density curves: the higher the curves are on the left, the less probable these developments were assessed to occur. The higher these curves are on the right, the more probable these developments were assessed to occur.

Predictions in both June 2022 and September 2022 were particularly pessimistic: the partial resumption of activities in June 2022 did not alter this prognostic. As can be observed by focusing on the wave 3 predictions, the change in Arctic Council chairmanship in May 2023 and the incremental and low-key leadership of the Norwegian chairmanship thereafter moved the needle. Arctic experts are now expecting cooperation to be more likely in the near future. This outlook related to the Arctic Council spilled over into other possible areas of cooperation for all eight Arctic states. Respondents perceived as more likely in September 2023 than in September 2022 that the Arctic Coast Guard Forum will resume its cooperation amongst all Arctic states (figure 2).

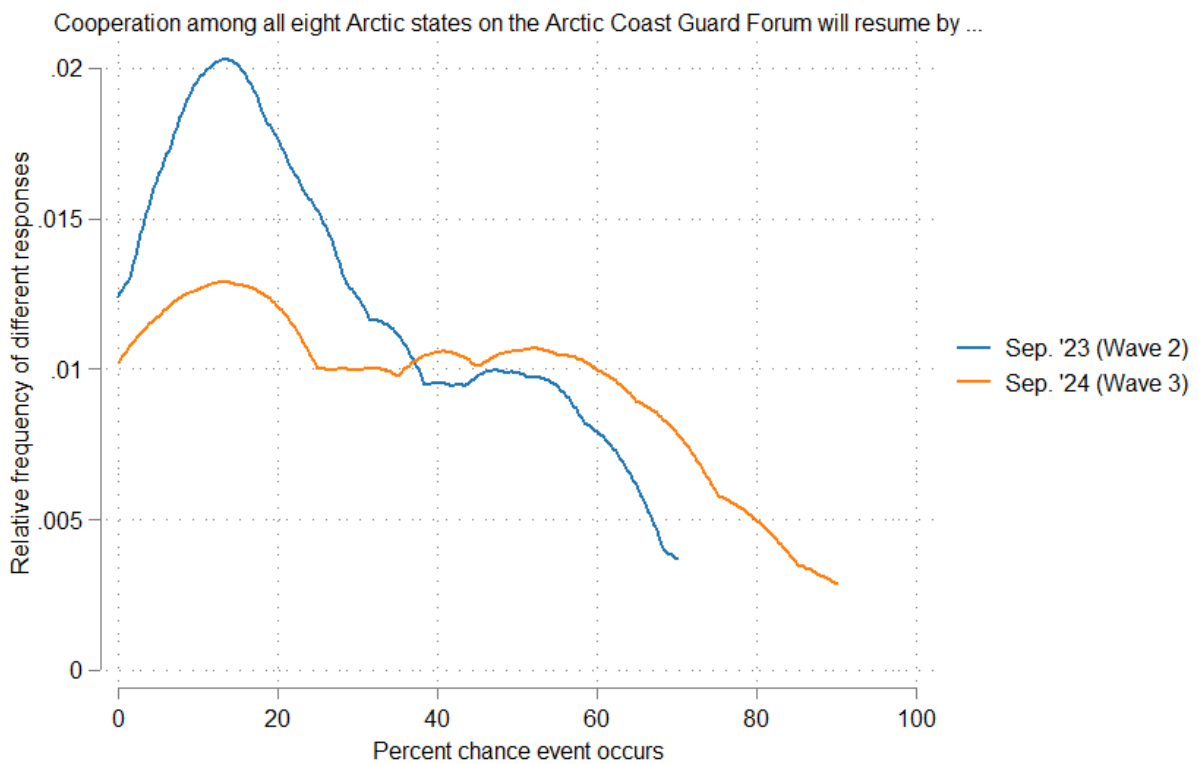


Figure 2: distribution of assessments of respondents on resumption of Arctic Coast Guard Forum activities.

The persistence of the war between Russia and Ukraine and associated sanctions against Russia have drawn heightened attention to the scope and depth of China-Russia cooperation, from business deals through joint military exercises to heightened diplomatic exchange. Experts predicted that this rapprochement will expand to the military realm in the Arctic region, with more respondents perceiving as likely in September 2023 than in September 2022 the possibility that China will participate in a military exercise in the Russian Arctic during the upcoming year (figure 3).

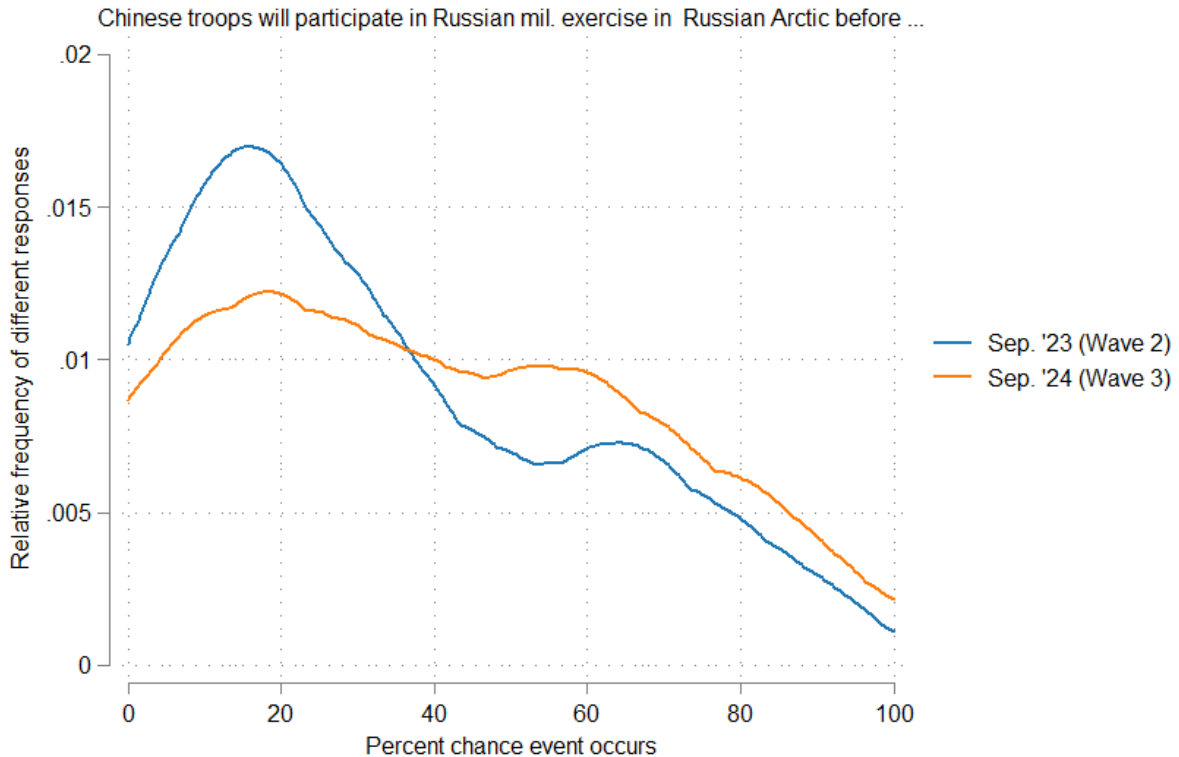


Figure 3: distribution of assessments of respondents on China-Russia military cooperation in the Arctic.

On the other hand, assessments of specific scenarios remained almost identical throughout the three waves. For example, the likelihood of a military conflict on a medium-term horizon (before 1 January 2026) was perceived as very unlikely by most respondents in all three waves. The Russian invasion of Ukraine and its potential spillover effect did not influence respondents into perceiving a gloomier future for the Arctic region as far as military conflicts are concerned. This idea remained the most constant assessment of the three waves of the Arctic barometer and reaches the status of a dominant and stable idea about the Arctic.

Continuity was also observed regarding Greenland’s independence. Devolution agreements from Denmark to Greenland were thought as incremental processes to grant powers and responsibilities to Greenland, with the logical conclusion being Greenland acceding to complete sovereignty. Most political parties in Greenland are pro-independence, but financial independence is often presented as the main obstacle to achieving this goal. Thus, the question on this issue is not so much if Greenlandic independence will happen but when. We tested two different scenarios on this front: the likelihood of Greenland reaching independence from Denmark before 1 January 2025 and before 1 January 2030. Arctic experts predicted as more likely that Greenland will be independent by 2030 than by 2025: the most popular assessment was around 40% for the former, and between 0 and 10% for the latter (figures 4 and 5).

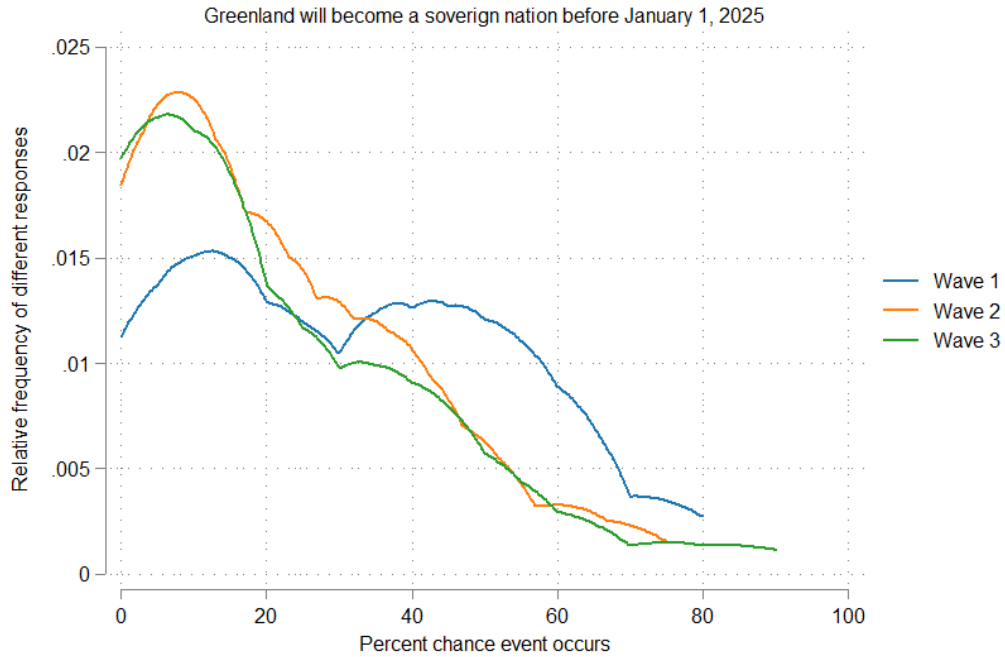


Figure 4: distribution of assessments for Greenlandic independence before 2025.

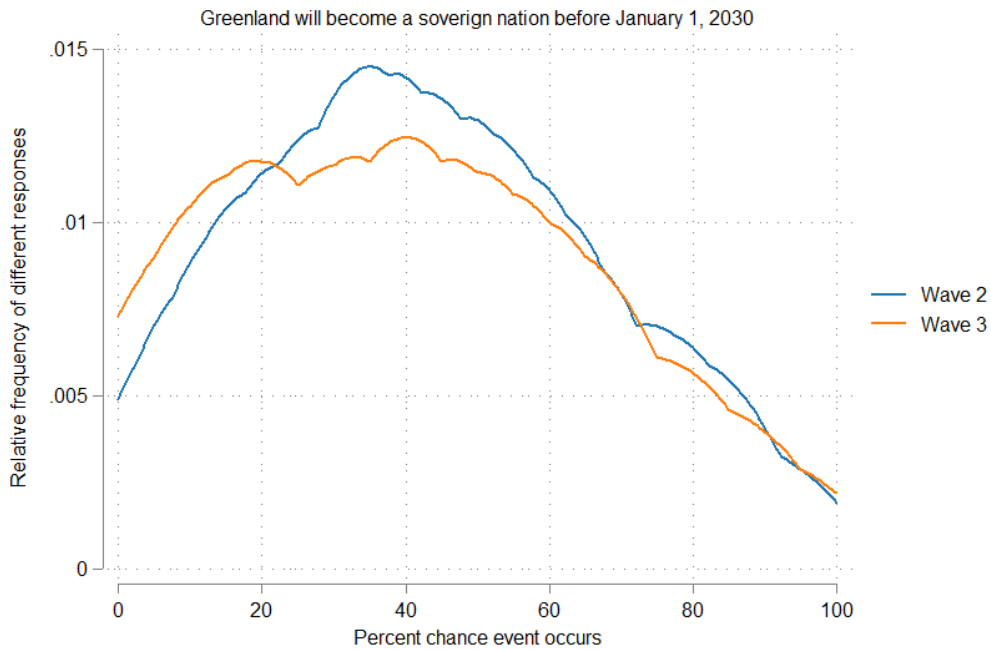


Figure 5: distribution of assessments for Greenlandic independence before 2030.

Continuity dominates experts' opinions on this matter, although the different answers given for 2030 rather than 2025 demonstrated that a sense of change may be afoot. It is somewhat surprising that some developments did not register with experts between the previous and the most recent survey time. For example, the Government of Greenland unveiled a draft constitution for a future independent Greenland in May 2023. We expected that observers could have interpreted this as a preliminary step towards independence, a signal that Greenlandic independence is in the works, even if for a more remote time (2030 for example). Two hypotheses may explain why this did not move the proverbial needle. First, maybe the news did not reach Arctic experts and they were not informed. Second, the initiative could have been interpreted as too preliminary to warrant a change in predictions. After all, this draft constitution, which remained at a very early stage of development, did not address fundamental questions about economic dependence vis-à-vis Copenhagen.

Threat perception and incorrect assessments

The predictions formulated by respondents can also inform us about which actors are perceived as threats. For example, we asked experts about possible military initiatives that could be undertaken by the United States or Russia in relation to other Arctic states. Among these initiatives, we included the operationalization of a freedom of navigation operation (FONOP) by the United States, a military exercise in the Exclusive Economic Zone (EEZ) of another Arctic state by Russia, and a violation of another Arctic state's airspace by Russia.

In wave 1, we presented respondents with both the U.S.-led FONOP and the Russian airspace violation scenarios. The U.S.-led FONOP was perceived as more likely than the Russian airspace violation, with a median estimate of 60/100 for the former and 50/100 for the latter (see figures 6 and 7).

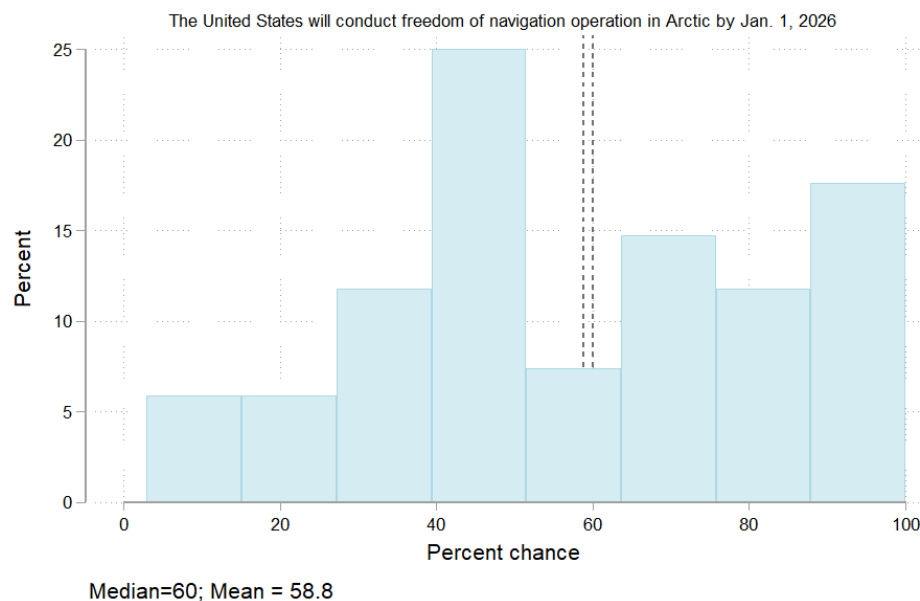


Figure 6: distribution of assessments of a U.S.-led FONOP in the Arctic region from wave 1.

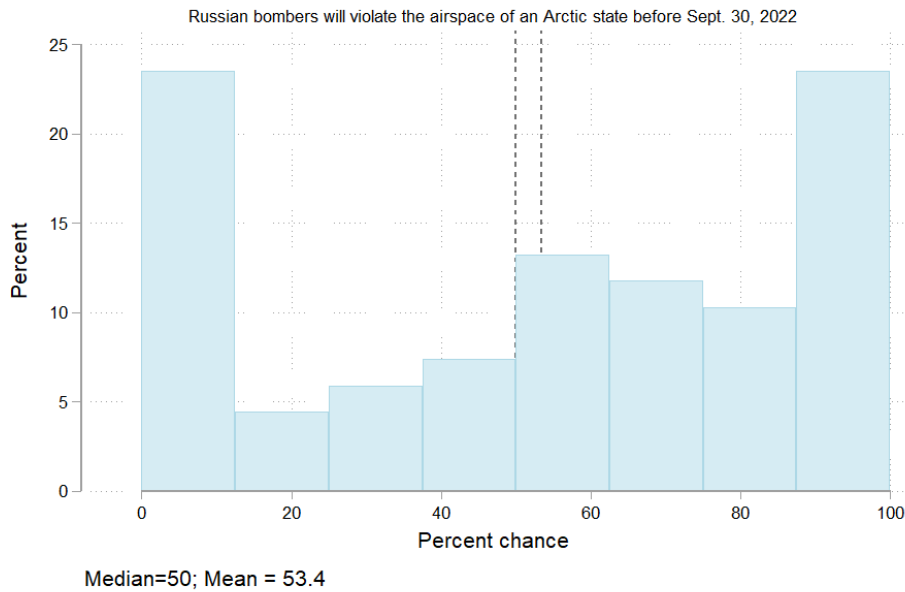


Figure 7: distribution of assessments of a Russian violation of another Arctic state airspace from wave 1.

Respondents tended to have low likelihood assessments relating to Russian military initiatives in the Arctic region. For example, most respondents estimated only a 20-30% chance of that Russia will hold a military exercise in the Exclusive Economic Zone of another Arctic state (figure 8).

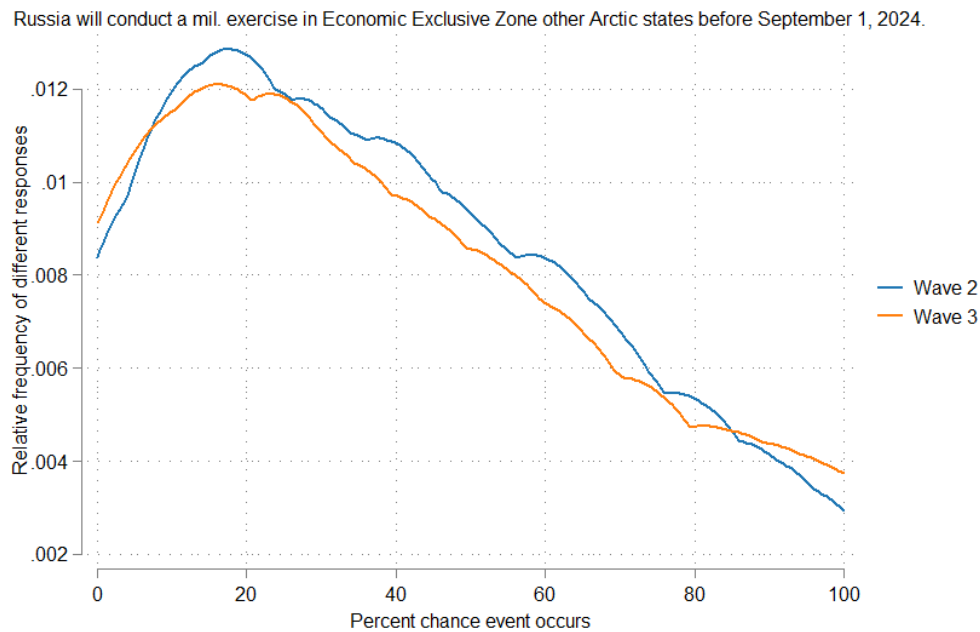


Figure 8: distribution of assessments for Russia conducting a military exercise in the Exclusive Economic Zone of another Arctic state.

This underestimation of the Russian threat also corresponds with the two scenarios that actually played out. On 18 August 2022, Russian fighter jets violated the sovereign airspace of Finland, and Russia conducted a military exercise in Norway's EEZ in August 2023. Very few experts that responded to the Arctic Barometer questions deemed these developments likely, especially the latter scenario. The difficulty of predicting Russian military action in the Norwegian EEZ is puzzling, given Russia's history of announcing military drills in these waters.

Key findings and considerations

This type of exercise allows us to recognize areas of consensus and contestation. Some key findings can be extracted on the basis of the responses:

- 1) On the one hand, there was strong agreement, sustained over time, about the low likelihood of military conflict in the Arctic. There was also strong consensus that Greenlandic independence was unlikely in the short term and that Russia would not conduct a military exercise in the Exclusive Economic Zone of another Arctic state. Furthermore, specific signals were perceived as credible by respondents. Hope in renewed cooperation at the Arctic Council remained low before the chairmanship transition from Russia to Norway. The transition boosted confidence that the Council could restart collaboration amongst all eight Arctic nations.
- 2) The assessment is much more contested and variable over time on specific developments. For example, Greenlandic independence is assessed as more plausible before 2030. Assessments of the Russian threat is also subject to diverse appreciations. Figure 7 is the most indicative of this contestation: about 25% of respondents assessed as very unlikely (between 0 to 10% chance) the possibility of Russia violating the airspace of a fellow Arctic state. The same proportion of respondents evaluated that this scenario was very likely to happen (90 to 100%). On this point, areas of consensus were harder to reach on issues that are highly fluid and on which major change occurred recently.
- 3) On the whole experts tended to favor continuity, even as the media picture and changes on the ground would suggest otherwise. For example, Russia has an history of conducting military exercises in the Exclusive Economic Zone of Western countries, especially Norway. Most respondents thought this scenario was unlikely, an assessment that is surprising given the increased hostility between Russia and the West since 2022 and in light of publicly reported incidents in Norway's Exclusive Economic Zone. Although China and Russia have drawn closer since the invasion of Ukraine and subsequent sanctions, there is still strong support for the idea that their bilateral cooperation will remained limited on Arctic military matters.

In sum, experts tended to favor continuity across these diverse questions and differing responses, predicting that tomorrow's weather would be similar to today's. Indeed,, even in a more uncertain world, path dependency does tend to shape events and political practices. However, some of the accepted wisdom – valid because it has indeed reflected and shaped Arctic realities – may risk falling into the realm of truisms or taken-for-granted baselines for further analyses and research priorities. This is a particular risk, given the relatively tight-knit community of Arctic experts and the level of agreement on certain points as documented above. This does not mean that unfounded risks should be

prioritized in research or exaggerated in analysis. Rather, this means that experts need to strive consciously to keep a highly empirical and rigorously updated approach to analyzing and re-analyzing key Arctic trends.

Notes

¹ We directly approached experts via email and social media to answer the poll. Our definition of experts was broad in order to include as many stakeholders and interested parties as possible that have expertise on the region. We considered experts any stakeholder actively engaged in discussions focusing on the Arctic region or experts for which the Arctic was one of their main areas of expertise.

² Wave 1 was closed before the announcement of the partial resumption of activities of the Council.