

## Egmont Event „Greenland: Melting Ice, Rising Stakes”.

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First, I will outline recent developments that have increased the Arctic's economic and geopolitical significance, with a particular focus on Greenland's role in resource extraction and strategic positioning. Next, I will address the relationship of the European Union (EU) and Greenland in the current context and perspective.

### **Greenland & the growing importance of the Arctic**

#### *I. The growing geo-economic importance of the Arctic.*

- **Climate** : The Arctic is warming four times faster than the rest of the world.

This has, first and foremost, dramatic consequences for climate change in the region, but also for the whole world. We are warming up, because the Arctic is getting warmer. And because of this warming up, there is a sharp increase in extreme weather patterns around the world.

The warming up of Greenland implies that glaciers are melting. Greenland, mainly covered by ice, is six-times the size of Germany. In case the whole icesheet of Greenland melts, this will cause an average rise of 7 meters of sea-level, worldwide.

- Another consequence of the melting ice is that the **Arctic's enormous natural resources** are becoming more accessible.

These are significant oil and natural gas reserves, as well as rich mineral resources. In addition, the melting ice is opening up "new" shipping lanes, including the Northern Sea Route (NSR) connecting Asia to Europe, significantly reducing transportation time. This has an impact on global shipping, and thus also on global trade.

- **Critical minerals in the Arctic.**

Critical minerals are essential to the European economy. Especially rare earth elements are critical for green technology and defense.

At present, the EU is heavily dependent on a few countries, or even a single country, for many critical minerals. For example, China supplies 98% of the EU's supply of rare earths.

Given this high dependence, the EU wants to diversify its sources of supply of critical minerals. To this end, the EU adopted an EU Strategy for Critical Materials in 2023.<sup>1</sup> This is a question of *strategic autonomy for the EU*.

- ***The Arctic*** is emerging as a key region where leading nations are striving to redefine the global landscape of mining.
  - The EU sees access to these resources as a strategic security imperative, especially in the context of its Green Deal initiatives and its quest for strategic autonomy.
  - The United States, particularly President Trump, is extremely keen to reach agreements regarding access to critical mineral development, whether in the Arctic (Greenland) or in other regions (Ukraine; Africa).
  - China's interest in critical minerals in the Arctic is largely driven by geostrategic ambitions and the need to meet its domestic demand for minerals. China aims to strengthen its dominant position in this sector.
  - In contrast, Russia, facing growing international isolation, must rely on China for the technology, extraction capacity, refining expertise and export markets that are needed to develop its critical minerals sector, including its huge, untapped reserves of rare earth elements, in the Arctic.
- ***Critical minerals and the case of Greenland.***
  - Greenland has ***huge reserves of largely untapped critical minerals*** like rare earth elements<sup>2</sup>, uranium, zinc, graphite, copper, nickel and iron. But we are speaking here mainly of a huge mineral ***potential***. Indeed, as of January 2026, there are only 2 operating mines in Greenland: a gold mine and anorthosite mine<sup>3</sup> There are several projects in an exploration phase, one big project related to the exploration of zinc. Greenland (northern Greenland) has one of the world's largest undeveloped zinc deposits.<sup>4</sup>
  - Major challenges of mining in Greenland are the extremely high operating costs due to the lack of infrastructure, lack of electricity, the need to import a workforce, and a rough Arctic climate that limits exploration to a few months a year.

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<sup>1</sup> It aims, among other things, to ensure that, by 2030, at least 10% of the production of these critical raw materials comes from European mining.

<sup>2</sup> Greenland has 25% of the world's reserve of rare earth minerals.

<sup>3</sup> Anorthosite is considered as a “green” source for aluminum. It constitutes a large portion of the moon’s crust.

<sup>4</sup> The project is earned by Ironbark Zinc that has a 30-year mining license (since 2016), which began infrastructure preparations (an air strip and a port) in 2018.

- Moreover, Greenland has very strict regulations. It regulates mining through strict environmental and social guidelines, to manage the potential though risky economic opportunities.

A striking case, which also demonstrates Greenland's considerable authority, relates to mining of uranium. In 2021, the government of Greenland implemented a strict ban on the exploration and mining of mineral deposits of uranium. This decision was confirmed by the new government in 2025.

Greenland has a zero-tolerance policy for significant uranium production. It gives high priority to environmental protection and public health, over potential economic gains from mining rare earth elements. This is remarkable as Greenland requires economic growth to achieve independence, a goal shared by all its political parties.

- Moreover, the Danish Government has the legal authority to block investments in Greenland on national security grounds. And it did so in 2016 and 2018 to block investments in Greenland's infrastructure, including in a former Danish naval base. Denmark also blocked proposals by China to open a scientific observatory in Greenland. In other words, Denmark, already now, can and does block investments coming for example from China.
- These factors weaken President Trump's case for acquiring Greenland for its mineral resources. The reasons are:
  - Extracting critical minerals in Greenland is extremely difficult, risky and unlikely in the short time.
  - Moreover, the American Arctic - Alaska - is very rich in critical mineral resources and huge potential. Regularly a critical mineral Summit takes place in Alaska.
  - Finally, the US does not need to have sovereignty over Greenland to access resources.
- The *Energy Sector* and the *Geo-Economics of the Arctic*.

The energy sector is a major driver of Arctic geo-economics. The Arctic has huge energy resources, oil and gas - but we want to get rid of hydrocarbons - but has also rich green energy potential.

Energy is of strategic interest to the EU, particularly the issue of *energy security*.

When Russia invaded Ukraine, one of the first steps taken by the EU was to significantly reduce imports of Russian oil and gas (via pipelines) mainly from the Russian Arctic to Europe. The EU programme is called

RePowerEU.<sup>5</sup> Its goal was, still is, to end the EU's dependence on Russian fossil fuels, and to tackle the climate crisis by focusing on green energy.

The EU has been very successful in reducing its dependence on Russian oil and gas imports (via pipelines). However, there are still many loopholes in the sanctions. Russia's current so-called shadow fleets are well known for transporting Russian oil and gas from the Arctic. This phantom fleet has allowed Russia to circumvent price caps, circumvent sanctions and Western insurance service boundaries.

In addition, the West has failed to reduce imports of LNG (Liquified Natural Gas) from the Russian Arctic. Russia even managed to increase substantially the export of LNG. With these revenues, Russia still manages to finance a third of the war expenses with Ukraine. The EU has now finally decided to stop Arctic LNG imports from Russia to Europe in the beginning of 2027.

It is important to mention that the European Arctic is particularly rich in *renewable energy*.

The Arctic has abundant sources of hydroelectric, wind and geothermal energy. A relatively new development is investments in hydrogen. Here too, the Arctic can be part of the solution to strengthen Europe's energy security.

The case of Greenland and renewable energy:

- A Belgian university (Luik/ Liege) studied the wind power potential of Greenland. South Greenland has the strongest winds on earth. The project, called KATABATA, examined the possibility of installing 4000 windmills in Greenland.
- Technically this is possible, as already now, especially equipped windmills for extreme cold weather, do operate in the Arctic. The study showed also an interest in connecting Greenland to Europe. However, a significant challenge lies in the transmission of renewable energy over extended distances, for example, delivering wind-generated power from Greenland to Europe. But innovative technologies, which are promoted and supported by the EU, can and will offer solutions in future.

## **II. The growing geopolitical importance of the Arctic and of Greenland.**

Due to the growing geoeconomic importance of the Arctic, geopolitics comes into play. Geopolitical powers are keenly interested in the Arctic.

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<sup>5</sup> RePowerEU, a plan to rapidly reduce dependence on Russian fossil fuels and accelerate green transit, was adopted in May 2022. (COM (2022) 230 final).

- **Russia and Putin**

The Russian Arctic accounts for more than half of the total Arctic region. The Russian Arctic is of key strategic interest to Russia.

- Economically, the region accounts for 10 -11% of Russia's GDP, due to significant economic activities in its north, especially oil and gas, including LNG extraction, and 20% of its exports. Moreover, the Northern Sea Route, which has the long-term potential to become an important international shipping lane, significantly reducing the distance between Europe and Asia.
- But its Arctic is also essential for Russia's security.

The Russian Navy, including the Northern Fleet, is based in the Arctic. Russia has the heart of its nuclear weapons in its Arctic, near the Norwegian border, in the region around Murmansk and the Kola Peninsula. Russia uses the Barents Sea for research and development of new nuclear weapon delivery systems.

Russia has remilitarized its Arctic<sup>6</sup> especially since 2014, after annexing Crimea, but Russia is now taking an increasingly aggressive stance toward the West. Maintaining a strong Russian military position in its Arctic is a top priority for Putin.

- Russia and Greenland:

Russia, especially after the invasion of Ukraine, represents a tremendous security risk for Europe and for the Arctic region, but not particularly for Greenland.

Russia's nuclear submarines are stationed in the Russian Arctic, not close to Greenland. From there, Russia can use them to fire nuclear missiles at the US, meaning that their missiles will fly *over* Greenland, on their way to Washington.

There are no warships and submarines sailing around Greenland. Russian naval vessels sail in the Barents Sea around Svalbard and along the Norwegian coast, to show that they can stop any attack on the nuclear weapons on the Kola Peninsula.

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<sup>6</sup> By early 2025, Russia's Northern Fleet had accumulated nuclear ships and submarines. The Kola Peninsula is home to 7 of the Russian Navy's 11 ballistic missile submarines, which will be essential in the event of a conflict with NATO.

There are however regular Russian and Chinese vessels near the coast of Alaska. Russian military exercises have been interfering with Alaskan fishers. There are increasingly Russian naval operations taking place in the Bering Strait. There have been joint operations of Russian and Chinese warships off the coast of the Aleutian Islands<sup>7</sup>. Hence, if President Trump is concerned about Russia's dominance in the Arctic, he should focus on what Russia is doing together with China, near Alaska.

Russia is not interested in Greenland. Russia has publicly stated in January 2026 that Russia has “no claims” or aggressive intentions regarding Greenland, dismissing claims of territorial interest as false.

However, Russia probably will not like the presence of NATO forces in Greenland. According to some sources, Russian officials have warned against the militarisation of Greenland by NATO, stating that such actions could threaten regional stability.

- **China and the Arctic.**

Since 2018 when China issued its Arctic Policy, it is calling itself a “near Arctic State”. There are a growing presence and activity of China in the Arctic. This is part of China’s emergence as a global power. China is using the Arctic as an arena to project power. It is strategically positioning itself in anticipation of further melting of the ice.

China excels in Polar research. Its Arctic research vessels also serve dual purposes, frequently operating near the U.S. coast and Alaska.

China has a strong economic interest in being active in the Arctic, because of energy resources, critical minerals, and using the Northern Sea Route. Since the West's imposition of sanctions on Russia when it invaded Ukraine, Russia has been badly in need of China's economic cooperation and support. Russia needs China to keep up with the economic development of the Russian Arctic, to invest in the Northern Sea Route, and to buy energy resources from Russia.

But besides increased Russia-China’s economic cooperation, what is new is a Sino-Russian alliance or partnership in the Arctic even in the military field. This union of Russia and China in the Arctic is also a concern of NATO (see the declaration of the NATO Summit in Washington of July 2024).<sup>8</sup>

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<sup>7</sup> The Aleutian Islands are a chain of mostly volcanic islands extending southwest from the Alaska Peninsula towards Russia in the Northern Pacific Ocean.

<sup>8</sup> Statement of the NATO Summit in Washington: "The deepening of the strategic partnership between Russia and China, as well as their mutual attempts to undermine and shape the rules-based international order, are of great concern." (July 2024).

## China and Greenland:

Chinese vessels do not sail around Greenland. They mainly sail to and from Russia with raw materials, and they sail outside Alaska to hold military exercises, to conduct mainly dual use research, and to fish.

In 2024, Chinese bombers were identified off the coast of Alaska. The Chinese Coast Guard entered the Arctic Ocean via the Bering Strait, and the Chinese Navy kept exercising in the Bering Sea. These activities are not one-off maneuvers; they are a sign of things to come. They also represent a move to support Russia in its Arctic standoff with the US.<sup>9</sup>

And Chinese companies have been interested in investing in Greenland especially in mining. But many of those projects have been put on hold for security reasons.

- **The United States, Trump and the case of Greenland.**

In 1832, President Andrew Jackson - who was a known supporter of territorial expansion - initiated efforts to acquire Greenland. The undertaking gained significance following the report by his Secretary of State, William H. Seward, titled "*Report on the Resources of Iceland and Greenland*" which emphasized Greenland's economic and strategic value.

In 1916, the US issued a Declaration on the occasion of signature of the Convention respecting the cession of the Danish West-Indian Islands to the US, that the US "*has the honor to declare that the Government of the United States of America will not object to the Danish Government extending their political and economic interest to the whole of Greenland*"

In 1917, the US bought the Caribbean Island "Sankt Jan" (Saint John) - today the American Virgin Islands - from Denmark, accepting Denmark's claim to Greenland.

In 1933, following a dispute between Norway and Denmark, the International Court of Justice confirmed that Denmark contains full sovereignty of Greenland under international law.

In 1946, President Truman offered Denmark to buy Greenland, which it refused.

In 1951, during the Cold War, an Agreement concerning the Defense of Greenland was concluded between the US and Denmark. Reinforced by NATO

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<sup>9</sup> See article: "Alaska, not Greenland, should worry the US in the Arctic", Commentary of 28 October 2025, published by the Arctic Institute.

membership, it authorises US military presence in Greenland, centered on the Pituffik Space Base, formerly the Thule Air Base. This Treaty, amended in 2004 to recognise Greenland's Home Rule government and to require the US to inform them of changes, permits the US to operate defense areas, maintain, and construct military facilities for Arctic security.

In 2019, President Trump floated the idea of buying Greenland, which was seen as an "absurd proposal."

In 2025, President Trump repeated that he wanted to acquire Greenland, insisting that "U.S. ownership and control over Greenland is an absolute necessity."

In 2026, President Trump intensified pressure on Greenland to become part of the US. He has argued Greenland is vital to US national security, saying that the island is under threat from Russia and China, and that Denmark cannot secure it from these dangers.

While he has often spoken of purchasing Greenland, he has also said that the US would obtain it "one way or the other", and up to 21 January 2026 refused to rule out using military force.

The meeting between President Trump and NATO SG Mark Rutte in Davos (January 2026), discussed a possible "deal". However, it is not up to NATO to negotiate in this context on the matter of national sovereignty or territorial integrity. This concerns exclusively Greenland and Denmark. As the crisis or escalation might be managed for the moment, the crisis is not yet settled.

President Trump has clearly been testing limits of the NATO Alliance. The consequence is that NATO has reframed Arctic security as an Alliance issue.

Why does President Trump want to acquire Greenland? Due to Greenland's strategic importance, in terms of location, security and resources:

- Strategic location: Greenland enjoys a unique strategic geopolitical location. Greenland plays a key role in NATO's security framework, especially given the GIUK Gap (Greenland - Iceland - the United Kingdom), which is important for monitoring and potentially restricting Russian naval movements in the North Atlantic and Arctic Ocean.

Greenland plays a key role in the defense of the US against external threats, particularly in the Arctic region. The US has maintained a military presence in Greenland since World War II, underscoring Greenland's importance to U.S. surveillance and missile defense in the Arctic.

- Presence of rich strategic resources. New shipping routes and rich resources have placed Greenland at the forefront of international relations. Greenland is rich in rare earth minerals, which are essential resources for the energy transition and emerging technologies. Greenland has 25 of the 34 minerals on the EU's list of critical minerals. The US, EU and other countries want to reduce their dependence on Chinese dominated supply chains.

President Trump's position is a categorical rejection of the rule of international law, a rejection of the principle of self-determination, which is a common cornerstone of modern international law. Indeed, Greenlanders have the exclusive right to decide their political future.

In addition, the use of force to illegally acquire the sovereign territory of a NATO ally would be a serious problem within the NATO Alliance. This would test internal cohesion among NATO states.

Greenland's well-known motto is: *"Nothing about us, without us"*.

- **The EU and its strategic interest in the Arctic region.**

The EU considers the Arctic region to be of strategic importance. *"The European Union is in the Arctic. As a geopolitical power, the EU has strategic and everyday interests, both in the European Arctic and in the wider Arctic region"*.

It is with this strong declaration that the EU presented in October 2021 its updated Arctic Policy under the title *"A strengthened EU commitment to a peaceful, sustainable and prosperous Arctic region"*.

Unlike the EU's 2016 Arctic policy, the 2021 version - adopted before Russia invaded Ukraine - places significantly greater emphasis on the EU's role in geopolitics and security. This was necessary. However, it did not realise this objective in practice.

Recent developments regarding Greenland and the US have confirmed that EU's Arctic policy needs urgent updating, notably to strengthen EU's role regarding Arctic security. The EU now has launched a public consultation for updating its current Arctic Policy of 2021.

## **The EU and Greenland**

- Already the current EU Arctic Policy of 2021, mentions Greenland as one of the eight "Focal Points" of its policy.

- Greenland has currently the status of “*Overseas Country and Territory*“ (OCT), associated with the EU, through Denmark. Greenland is a self-governing territory of the Kingdom of Denmark.
- As an OCT, Greenland is not part of the EU but maintains a special relation with it. Greenland voted to leave the then European Economic Community (ECC) in 1982 due to disputes over the Common Fisheries Policy and loss of sovereignty, officially departing in 1985. However, Greenlanders are Danish nationals and therefore hold the citizenship of the EU .
- Denmark contains full sovereignty of Greenland under international law. This includes exclusive competence over foreign affairs, defense, security policy, and the conclusion of treaties with defence of foreign policy implication. Under international law, any territorial transfer requires the sovereign state consent.
- What does it mean for Greenland to be an OCT (Oversees Country & Territory)?
  - As an OCT, Greenland has a wide-ranging political dialogue with the EU.
  - It has preferential trade arrangements to access the EU market.
  - As OTC, Greenland receives allocations from EU’s budget. It is one of the largest recipients per capita in the OCT’s (225 million € foreseen between 2021 and 2027). The EU has now decided – following the recent developments as to Greenland and the US, to double this support.
  - As OCT they are eligible to other EU Funding programmes (e.g. Invest EU, Horizon Europe, and Erasmus+). They are also part of intra-regional cooperation. Youth of Greenland are participating in the OCT-Youth Network.
  - As OTC, being part of Denmark, Greenland could also benefit from the Mutual Defence Clause, as enshrined in Article 42.7 of the Treaty on European Union (TEU) <sup>10</sup> , although this is contested among lawyers

This provision states that if a Member State - Denmark in this case- is the victim of armed aggression on its territory, the other EU members have an obligation to 8 and assist it by all the means in their power.

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<sup>10</sup> Arctic 42 (7) of the EU Treaty (TEU) - or the EU’s Mutual Assistance Clause - means that if an EU Member State is being attacked, all other member states have to provide assistance in response. The article does guarantee solidarity amongst Member States in case of an armed aggression against any one of them. The assistance can, for example, range from diplomatic support to civilian or military aid. This article is consistent with commitments under NATO, which is the foundation of collective defence for its members.

- Although Greenland being a self-governing territory of the Kingdom of Denmark, the reality of Greenlandic politics indicates that the next step for Greenland's autonomy is decidedly not to become an integral part of the United States, or any other country.

Instead, Greenland's ambition is to become a sovereign state. This position is clearly expressed in the 2024 Strategic Document, drawn up by the Government of Greenland, which is *"essentially the expression of a Greenland that, in cooperation with others, is progressing towards independence"*. This is an objective shared by all political parties in Greenland. However, to realize this objective, Greenland will need sufficient economic means - this is not the case today.

- The EU has a longstanding cooperation with Greenland, including:

An EU-Greenland Sustainable Fisheries Partnership Agreement since 2021, promoting sustainable use of marine resources. It allows EU vessels access to Greenlandic waters.

An EU - Greenland geopolitical partnership, by which the EU is actively countering Chinese and Russian influence in the Arctic by deepening ties with Greenland:

A cornerstone of the partnership is to support the educational sector in Greenland. Another cornerstone is to support Green Growth, as part of the core priority of the Partnership is to support sustainable development in Greenland. This implies support to renewable energy (including hydrogen production), to biodiversity protection, to critical raw materials.

In the meantime, the EU has proposed to double its financial support for Greenland (from 225 to 539 million €), to secure stronger cooperation in clean energy critical raw materials and digital connectivity. The European Commission will soon put forward a substantial package of investments in Greenland.

#### Strategic Partnership on Raw Materials:

In November 2023, the EU and Greenland signed a Memorandum of Understanding (MoU) for a strategic partnership on raw materials. While this agreement focuses on the molybdenum, Greenland possesses significant untapped potential for other vital minerals such as rare earth elements, graphite lithium and nickel - all indispensable for Europe's green and digital transitions.

EU investment is focused on developing mining capabilities for rare earth metals and improving local infrastructure. The agreement is a blueprint for sustainable resource partnerships and sustainable mining.

The opening of the EU Office in Nuuk in 2024, is an important milestone in this partnership.

Following renewed US interest in acquiring Greenland in early 2026, the EU has moved to strengthen its partnership with Nuuk, viewing Greenland also as essential for Arctic security and green transition resources.

The EU has shown unity and strong solidarity with Greenland and Denmark.

The EU has responded decisively to Trump's threats: *“Nothing can be decided about Denmark or about Greenland, without Denmark or without Greenland”* (EU Council President Costa, 7 January 2026). *“They have the full solid support and solidarity of the European Union. Europe will remain a firm and unwavering champion of international law and multilateralism”*.

EU Joint Statement by EU Council President Costa and President von der Leyen on Greenland (17 January 2026): *“Territorial integrity and sovereignty are fundamental principles of international law; they are essential for Europe and for the international community as a whole. ...We have consistently underlined our shared transatlantic interest in peace and security in the Arctic, including through NATO. The pre-coordinated Danish exercise conducted with allies, response to the need to strengthen our security and poses no threat to anyone. The EU stands in full solidarity with Denmark, and the people of Greenland dialogue remains essential.”*

Political support and security: on 6 January 2026, major European leaders (France, Germany Italy Poland, Spain UK, Denmark) issued a joint statement of affirming that Greenland's future is for Denmark and Greenland alone to decide, rejecting US territorial ambitions.

Meanwhile, there is a rising pro-EU sentiment in Greenland: despite leaving the European Economic Community (EEC) in 1985, studies indicate a shift in public opinion, with a majority of Greenlanders now showing support for closer ties or to re-enter the EU.

A broader consequence of the Greenland-US issue is that the EU is now focusing on the Arctic, and especially on Arctic security. Greenland has been recognised as being very relevant for European security.

Commission President von der Leyen has recognized that the EU has under-invested in the Arctic and Arctic security, and that is high time to step it up. She suggested improving Arctic security by focusing defence spending on Arctic-specific equipment, such as acquiring a European icebreaker. The EU intends also to strengthen security and defence arrangements with partners such as the UK, Canada, Norway, Iceland and others. It is recognized that this has become a real geopolitical necessity.

Finally, regarding the *Legal Status of Greenland*, an article of 13 January 2026 on “*Mapping the Legal Question*” regarding Greenland and US annexation threats, came to the following conclusion, after having an initial analysis:

*“Greenland's unique status, simultaneously a Danish sovereign territory, a self-governing entity with recognized self-determination rights, an OCT outside the EU's geographical scope, an Arctic territory of immense strategic importance, creates legal ambiguities precisely where clarity is most needed. The question of how international law, EU law, and Danish constitutional law would respond to coercive or even consensual annexation attempts, requires careful examination”.*

*February 2026*