

## Policy 360 Episode 163 Arctic Policy with Tim Nichols

Manoj Mohanan:

There have been dramatic changes when it comes to the new administration's approach to public policy. One topic that might have come out of the blue for many Americans is the United States interests in Greenland. Greenland is located to the northeast of Canada and is a territory of Denmark. President Trump has repeatedly discussed his desire for the United States to acquire Greenland, citing national security interests. He has not ruled out using military force to do so. Denmark, which is a US ally, has said they're not interested in any new arrangements for the region.

Welcome to Policy 360. I'm Manoj Mohanan, interim dean of the Sanford School of Public Policy at Duke University. And here to explore the US interest in Greenland, and by extension, the Arctic, is Tim Nichols. Tim is a faculty member here at Duke at the Sanford School, where he also leads our Master of National Security Policy Program. Previously, Tim also served as an intelligence officer in the Marine Corps for over 20 years.

Welcome, Tim.

Tim Nichols:

Thank you. Thank you for having me.

Manoj Mohanan:

So Tim, were you surprised to hear President Trump being focused on Greenland?

Tim Nichols:

I was surprised at his response about military force being considered, but I wasn't surprised at his interest in Greenland. Many national security experts are, and there's two main reasons. The first is that with the ice melt in the Arctic, there's more ability to move around in the Arctic, and Greenland is a really important choke point. It is the nexus of the Northern Sea Route, which goes up into the north of the Nordic countries, Sweden, Norway, Denmark, Finland, and on the other side, it is the exit of the Northwest Passage, which goes over Canada. So geostrategically, it's a really important landmass.

Manoj Mohanan:

Tell me a little bit about your own interest in the Arctic and how does that relate to your interest in national security?

Tim Nichols:

Five or six years ago, I started studying the Arctic because I was interested in the economic opportunities in the Arctic and the security opportunities. And then I read a couple books about the United States and their Cold War behavior in the Arctic. And I came to realize that the Arctic is going to play a pretty central role in our national security strategy for the next 20 years. And so now I teach classes at our Master of National Security Policy Program on Arctic security, and we reach out to some of the leading scholars and policymakers in the United States security apparatus to discuss these topics.

Manoj Mohanan:

Great. I don't know if I told you this, Tim. Just this past summer I went up to Prudhoe Bay in Alaska, and it's this long 500 mile drive up from Fairbanks and got to see firsthand what the importance of the Arctic is for our oil reserves, and by extension, for national security. So with the melting of caps in the Arctic, Greenland being obviously one of them, but also in Alaska, it opens it up for opportunities for drilling for

valuable minerals. So if you were to think about drilling and its importance for minerals and national security, why go to Greenland when we have opportunities here in the US?

Tim Nichols:

There are a number of reasons. One is the United States is one subset of the opportunities. There's mining in Greenland, which there's a lot of critical minerals that are available. The liquid natural gas and petroleum. There are five or six major finds in the Arctic that are now accessible. So the United States is one of them, but there are many. We have a large military base already, US military base, on Greenland, and for the size of that landmass, they only have 50,000 residents or just shy of 60,000. So it comes across as a territory that is available. It's not true. Like you said, it's a sovereign territory, just like the Faroe Islands, that are part of the nation of Denmark. But the United States looks at, and I think they've come to the conclusion that we actually can't have security, can't have proper security without some form of relationship with Greenland and its territorial importance or its geostrategic importance to the Northern Atlantic.

Manoj Mohanan:

And you said some sort of a relationship. So that relationship could've been more based on a partnership?

Tim Nichols:

I think so. I think we have a strong relationship with Denmark, which is our NATO partner. And an interesting topic that just hit the news a couple of weeks ago was that Denmark is preparing to take over the chairmanship of the Arctic Council, which rotates every two years. Norway is coming out of it. And they've decided that instead of the leaders in Copenhagen taking it over, they've asked the leaders in Greenland to represent Denmark as the chair of the Arctic Council, which is a really important forum for Arctic issues. So it just goes to show there's strong relationship between Greenland and its territory, Denmark, a strong relationship between Denmark and the United States, and we would like to have a strong secondary relationship with Greenland. I think that's the strategy.

Manoj Mohanan:

Right. And since you've mentioned a population of 50,000 and since I mentioned to you about Prudhoe Bay, I'm tempted to wonder, was the offer at some point that the United States had said that citizens of Greenland could get the equivalent of a permanent fund that Alaskans have? Was that received well, do people think that would be a benefit to them?

Tim Nichols:

I think the people of Greenland are cautious about jumping to something like that, which comes across as a little bit of an unsubstantiated offer. The people of Greenland are surviving. Their population is relatively stable. I don't think they'd like to have a lot of growth. It's very rigorous terrain. But they are waking up to find out that their territory on which they sit is strategically valuable, and that changes everything. They can't ignore it. And so Greenland's great motto is, no one talks about us without us. And I think that's appropriate for this time.

Manoj Mohanan:

That's wonderful. That's wonderful. And when you talked earlier about melting ice, it also opens up the possibility of shipping routes. So talk to us about the importance of shipping routes in the Arctic, what China and Russia are doing in this space.

Tim Nichols:

Yes. I would say this is the central issue. The most accessible route that can connect China to Europe is over Russia in something called the Northern Sea Route. And it cuts 12 steaming days off of a transit that would leave a port in China and arrive in Russia, which is pretty substantial for economically 12 fewer steaming days. Last year, I think they moved 39 million tons of cargo, which isn't a lot. We move a billion tons a year through our other strategic choke points. But as the Suez Canal is starting to deal with some difficulties in the Red Sea and the Panama Canal is not deep enough, people look at these new opportunities to transit hemispheres with great economic interest.

In September of 2024, a pretty significant cargo ship called the Flying Fish, which carried 5,000 containers... The largest cargo ships in the world carried 10,000. So the Flying Fish carried 5,000 and it went from China to Russia over the Northern Sea Route. No problem. And so it's a case study of what is there. Now, I do want to share some caution, which is the search and rescue systems, the navigation systems, the satellite systems, the communication systems are all still pretty unrefined. So in order to have serious shipping, we're going to have to build infrastructure. And the second piece of that is the Russians are not agreeable to international shipping without the Russians supervising all of it. So every single ship that goes over Russia, even though we consider it international waters, is escorted and must pay Russia. So there's a policy issue there that needs to be worked through.

Manoj Mohanan:

So let's talk about the policy issues. If I heard you correctly, you identified infrastructure being one big limitation and something that we need to develop a lot of. And the second is about who controls this infrastructure. Are there other aspects or are there other nuances to the development of infrastructure that as a policy institution we should be thinking about?

Tim Nichols:

Well, one thing that I think is really important is often overlooked is the indigenous populations. So they're going to be affected by this when infrastructure begins to appear. The second, and we have to have an open discussion about, is there will be environmental damage. You remember the Valdez, the oil tanker and the devastation that it had in northern Alaska, that's bound to happen. So we have to come to terms with that. And then the last policy is we have to have some kind of definition or oversight of how commerce is going to occur so it's done safely and it's done within the regulations of the international community. That's going to require policy work not only at the national level, but at the international level.

Manoj Mohanan:

I see. And so when you think about Congress, would it be fair to think that some of our northernmost states or the ones that are more active in areas related to minerals, natural resources, gas, are the ones that are more likely to be invested in national policy related to the Arctic? Or is it a wide coalition of congressional leaders from across the country? What are you seeing now?

Tim Nichols:

Yeah, very good question. And my students talk a lot about this. We have two senators and one congressman who are Arctic related.

Manoj Mohanan:

I see.

Tim Nichols:

And then we have 500 others who are not. And so while people like me and folks that are working the natural resources field are very excited about the Arctic, Congress has a lot of other priorities. And so it's very hard for the United States to get traction on major investments for infrastructure in the Arctic. We have no deep water ports in the Arctic. We have two icebreakers, and both of them are in terrible shape. They're over 30 years old.

Manoj Mohanan:

I see.

Tim Nichols:

The Russians have 47, the Chinese have more than we do. And so it's difficult domestically to get the type of resources to actually exploit the Arctic in a way that would be economically beneficial at the moment. And it's just realistic. There are other priorities in the United States, but what we find... I think the general assessment is the United States is a little bit behind because of our democratic construct in that we can't convince senators from Arkansas or from North Carolina that the Arctic is where our priority should be.

Manoj Mohanan:

Right. And as we think about identifying these priorities, clearly one needs a lot of research into understanding the challenges and the opportunities. In your view, has the research into the Arctic, both for these opportunities as well as the geopolitics, has it been affected by, say, the Russian invasion of Ukraine or other major geopolitical events?

Tim Nichols:

It has. The Arctic Council, which is the primary forum for these types of research efforts, excluded Russia since the invasion. And Russia was the chair of the Arctic Council at the time of the invasion. So there's been a very deeply felt suspension of Russian participation. To its credit, Norway has led the Arctic Council for the last two years and has slowly begun to try to figure out a way to work with Russian scientists. 50% of the Arctic is Russia. They have a ton of really important scientific information that helps us understand what's happening in the Arctic. So while a lot of international politics are below the Arctic Circle, we try to keep everything above the Arctic Circle about science and sustainable development and environmental protection and ways to exploit what's happening in a positive way. So it's an interesting juxtaposition.

Manoj Mohanan:

Fantastic. Well, let's take the big picture, and let's say you got a phone call tomorrow from the administration and said, "We need some advice on Arctic policy." What would you tell them?

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Tim Nichols:

Well, the United States needs to, number one, listen to the Arctic experts, and those are the Finns and the Swedes and the Norwegians and the people of Iceland who deal with us on a daily basis. Number two, we have to let science drive, and we have an Arctic Research Committee in the United States that prioritizes our federal grants and our federal funding. And so we're well suited to do research in the Arctic now. Number three, we have to have an understanding of what security in the Arctic really looks like. Some people would say that the Russians are militarizing the Arctic because they're putting more military forces in the Arctic, but a more mature perspective would be that once access is easy to have over Russia, that they want to defend their sovereignty. So we have to have a mature look at what is happening in the Arctic, which is it's being militarized. It's defensively militarized, but it's being militarized.

So if I were to sit down and talk with policymakers, I would say the first thing that we can do and the cheapest thing that we can do is slowly work on our infrastructure in the Arctic, research stations, communications, transportation, information management. Those are the things that don't require sustaining people above the Arctic. Once you get that, then you can slowly build little populations of folks who can contribute to Arctic research and Arctic development. It's already happening. There are a number of big petroleum projects in the North Slope of Alaska that have been going very successful for many years, but we're not racing to the Arctic. It's very, very expensive to do just a little bit. And the United States needs to take a mature approach. And also, we have a lot to learn from Arctic countries that are predominantly Arctic. We are an arctic nation. Alaska is an Arctic state, but there are countries that everything they do is Arctic, and we have a lot to learn from them.

Manoj Mohanan:

Indeed. Words of wisdom. Thank you so much, Tim. Thank you for joining me today.

Tim Nichols:

Thank you very much.

Manoj Mohanan:

Tim Nichols is a faculty member here at Duke, where he also leads our Master of National Security Policy Program, which is a program specifically designed for working professionals. We will be back soon with another policy conversation. Thank you so much for joining us. I'm Manoj Mohanan.