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(Un)safe Waters

The Baltic Sea Region and the Redefinition of Security in Europe

Filip Bryjka, Amanda Dziubińska, Kinga Dudzińska,
Aleksandra Kozioł, Paweł Markiewicz, Tymon Pastucha

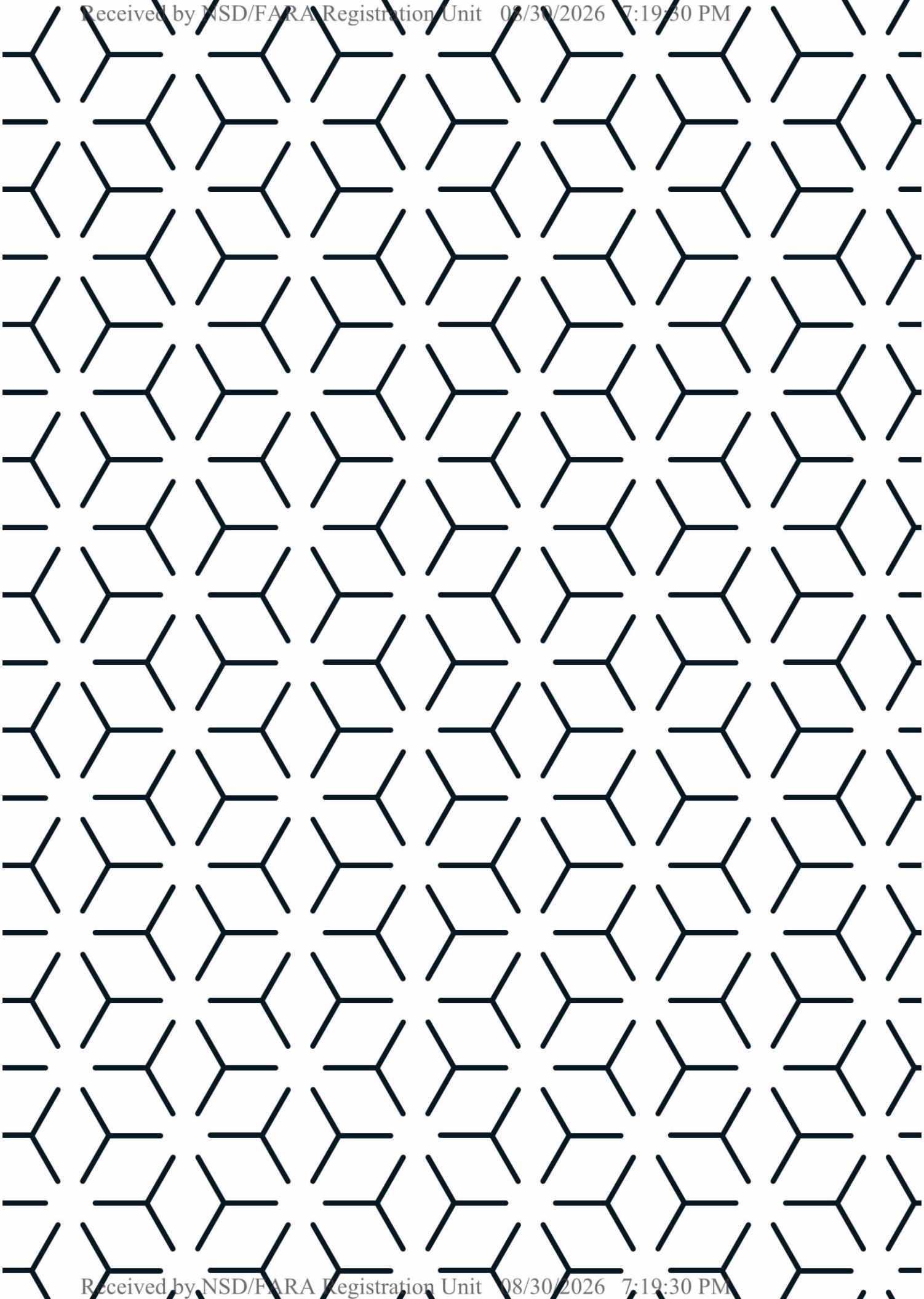
Eds. Amanda Dziubińska, Aleksandra Kozioł



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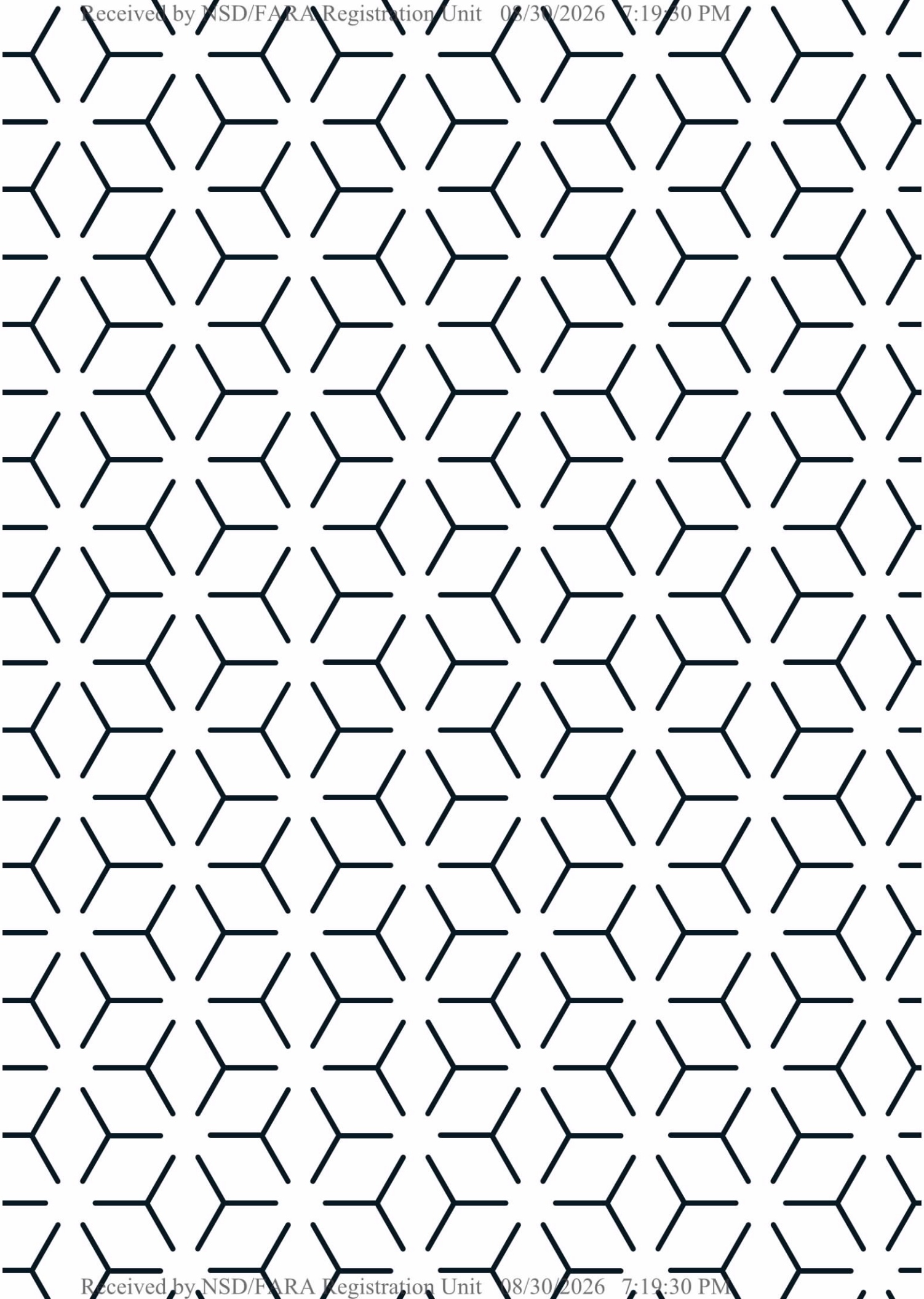
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Executive Summary

Military Capabilities

- Uncertainty about the future of American military involvement in Europe increases the risk of weakening the ability to defend and deter Russia in the BSR, forcing European states of the Alliance to increase their military involvement in defending the north-eastern flank.
- First and foremost, the BSR states should, as soon as possible:
  - increase their military spending to 5% of GDP, in line with the declarations of the NATO summit in The Hague in 2025;
  - increase their own defence capabilities, especially in the areas of air defence, long-range strike capabilities, electronic warfare, and satellite reconnaissance;
  - strengthen military cooperation in order to influence Russia's calculations and deter it from carrying out offensive operations against them.
- A key area will be improving interoperability, i.e. the efficient cooperation of NATO and EU forces. This could be achieved through large-scale multi-domain exercises involving the NATO Joint Warfare Centre in Stavanger (Norway), JFC Norfolk and JFC Brunssum, as well as regular naval exercises in the Baltic Sea under the command of the Military Planning and Conduct Capability (MPCC).

Protection against Threats

- The wide range of hybrid threats has a destabilising effect on the situation in the BSR, reducing the ability of the states in the region to strengthen their resilience. Despite the multitude of urgent security challenges generated by Russia in various domains, it is crucial to coordinate and prioritise actions while simultaneously focusing on current tasks and formulating effective medium-term policies.

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- A key element of security in the BSR should be strengthening intelligence cooperation, regional cooperation, and exchange of experiences between services such as border guards, coast guards, and police through specialised training focused on identifying and neutralising hybrid threats.
- It will also be important to modernise their equipment, including advanced sensors and unmanned platforms (such as surface and underwater drones), as well as improved coordination with the military (including navies) within the CISE.
- A "total defence" approach should be developed, including training for the population, including in crisis response, mechanisms for cooperation with local authorities, and mobilisation systems.

Energy and Infrastructure

- The BSR states should pursue coherent strategic signalling vis-à-vis Russia, making it explicit that actions targeting critical infrastructure and maritime navigation will entail tangible economic and political costs (including "shadow fleet").
- States in the region should adapt their national regulations and harmonise cross-border procedures in order to respond promptly and lawfully to new threats to critical infrastructure in emergency situations. At the same time, they should cooperate within the EU to strengthen and tighten Western energy sanctions, particularly against Russia's "shadow fleet."
- In order to reduce their dependence on fossil fuel imports, states in the region should accelerate the development of low-emission power generation, particularly by strengthening regional economic and technological cooperation to implement modern, resilient offshore energy solutions.

Transatlantic Cooperation

- Countries in the region, including Poland, should deepen their strategic dialogue with the US and Canada in order to develop a common transatlantic position that would include the Baltic Sea as part of security and defence planning of the contiguous Arctic region, constituting its leading southeastern maritime border.
- The Baltic Sea—currently virtually surrounded by transatlantic allies and partners—could become crucial for securing European, Arctic, and North Atlantic waters, while also providing the US and Canada a unique opportunity to strength-

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en alliances and partnerships, which are crucial for safeguarding American and Canadian interests in the Western Hemisphere against the ambitions of China and Russia.

- By combining Arctic and Baltic Sea security, the US and Canada would strengthen their interests in the Baltic Sea region within the broader context of the Arctic's growing global importance, thus strengthening their role in Europe.

Regional Cooperation

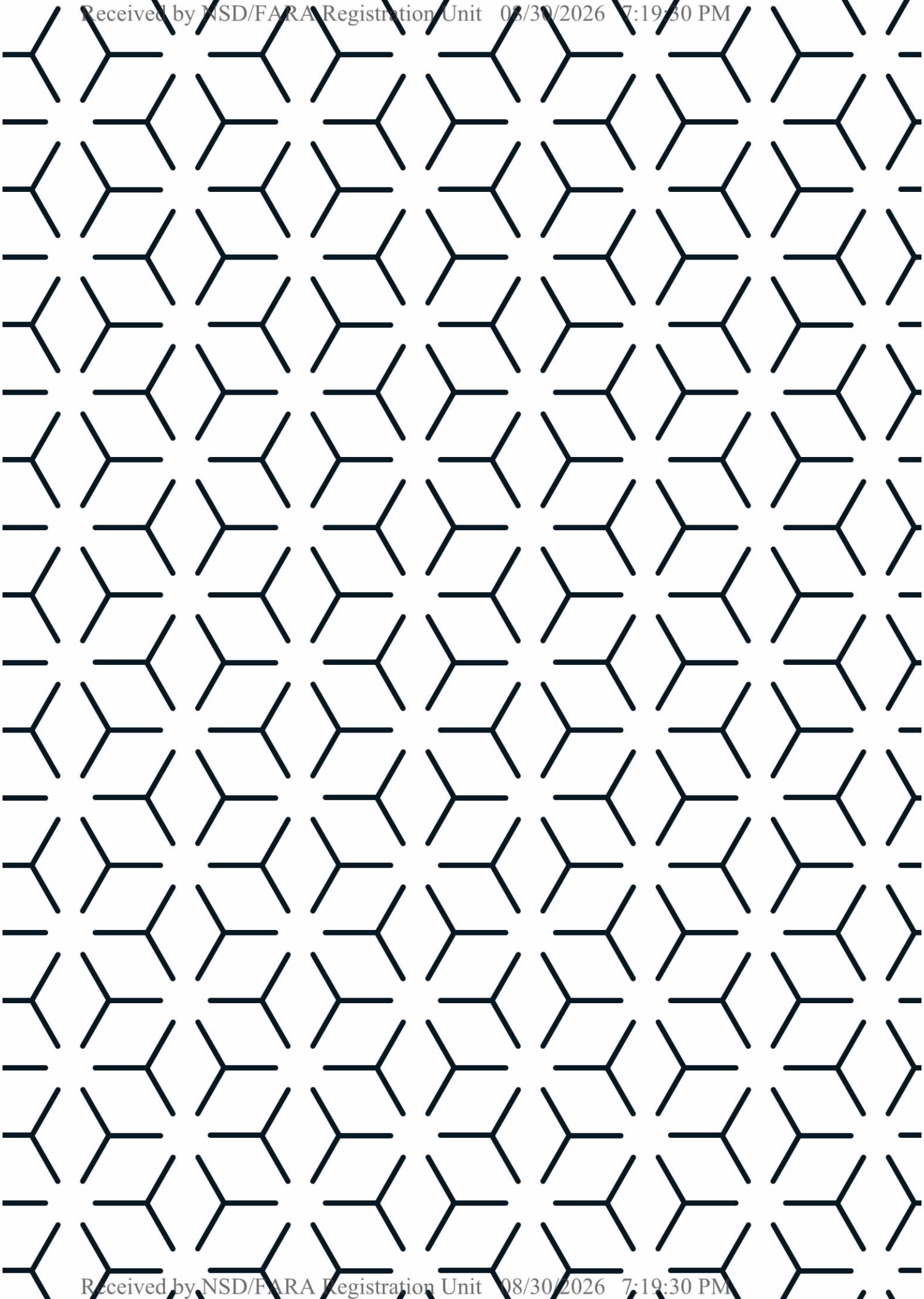
- In the face of growing and increasingly diverse threats below the threshold of war, BSR states should deepen political co-ordination.
- This requires strengthening the role of the Council of the Baltic Sea States as the principal platform for agreeing regional priorities by focusing its mandate on bolstering resilience, readiness and crisis response, and by granting the Council tangible executive tools.

Communications Policy

- The BSR states should develop a coherent strategic narrative around the Baltic Sea Region's role in Euro-Atlantic security. This narrative should clearly define why the Baltic is crucial for NATO and the EU, what the region's deterrence and defence objectives are, and what benefits a strengthened allied presence and security investment bring to citizens and economies.
- The communications policy should strengthen societal resilience. This entails regularly providing societies with clear explanations of the significance of military exercises, the presence of allied forces, or investments in critical infrastructure, as well as transparent communication about incidents while explaining mitigation measures.
- The communications policy must be systematically integrated into efforts to counter disinformation and other information operations conducted by Russia and other actors. Beyond building capacities to monitor and identify harmful narratives, proactive communications are needed–pre-emptively explaining potentially sensitive issues and rapidly debunking false information.

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Introduction

Amanda Dziubińska, Aleksandra Kozioł

Russia's unprecedented war against Ukraine, combined with intensifying Russian military pressure and hybrid aggression directed against EU and NATO states, has placed the Baltic Sea Region (BSR) at the centre of European security. Its strategic location—at the interface between the Euro-Atlantic space and Russia—has made it one of the key theatres of Russia's confrontation with the West.

The Baltic Sea is a small, semi-enclosed basin where the proximity of NATO states and Russia increases the risk of escalation, deliberate as well as inadvertent, potentially leading to armed conflict. For both sides, the BSR is operationally and strategically significant. Control of the Baltic determines not only the military situation on NATO's eastern and northern flanks, but also access—via the Danish Straits—to the North Sea and the Norwegian Sea, towards the Arctic and the Atlantic. This, in turn, shapes the ability to sustain maritime lines of communication and the availability of allied reinforcement both for the BSR and for the North Atlantic. Considered together with the Arctic and the GIUK gap (the Atlantic waters between Greenland, Iceland and the United Kingdom), the Baltic Sea is therefore an important area for deterrence actions against Russia, with direct implications for the security of communication routes linking Europe and North America.

With NATO's enlargement to include Finland and Sweden, the Baltic Sea has become almost entirely an internal sea of NATO member states. This has, on the one hand, strengthened the region's defensive potential, but, on the other, increased its salience in Russia's strategic calculations. Russia already treats the BSR as an arena of escalatory competition, above and below the threshold of open conflict. The security environment is also shaped by extra-regional factors, primarily the ongoing war against Ukraine, growing military and hybrid pressure from Russia on European states, rising tensions in transatlantic relations, and China's increasingly visible activity in the Arctic and the Baltic. At the same time, the BSR remains a significant area for the projection of EU security policy interests and instruments—from energy sanctions on Russia and climate policy, through regulation of critical infrastructure, to tools for strengthening

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resilience against Russian hybrid threats. In this sense, the BSR concentrates–like a lens–the shifts underway in Europe's security architecture, an important element of which is the local strengthening of defence capabilities and the tightening of co-operation among Central European, Baltic and Nordic states. The BSR is simultaneously becoming a space in which Western states' resilience to new forms of Russian threats is tested—and, in an escalation scenario, one of the most likely areas where kinetic conflict between Russia and the West could begin. The BSR's strategic geography also makes it a critical area for NATO and EU resilience. The region contains maritime lines of communication, strategically significant supply and troop-transit routes, telecommunications networks and energy cables, gas and oil pipelines, LNG terminals, ports, and—increasingly—renewable energy infrastructure.

The BSR's future security environment will largely depend on several factors:

- the evolution of Russia's strategy and resources (the pace at which it is rebuilding its military potential and its ability to sustain long-term hybrid activity);
- the shape of transatlantic relations (both the level of US engagement in European security and Europe's capacity to assume greater responsibility for its own defence);
- the dynamics of European integration in the field of security and defence (including the development of joint financing instruments, infrastructure regulation and climate-energy policies);
- the pace of technological progress (especially in unmanned systems, intelligence/ISR and situational awareness, cybersecurity, and protection of undersea infrastructure);
- the potential for growing tensions between security objectives, economic development and environmental protection at the level of the region and the EU as a whole.

The purpose of this report is to analyse changes in the Baltic Sea Region's security environment after 2022 and to identify the challenges and opportunities resulting from these changes. It combines a military perspective with an analysis of hybrid, energy and environmental threats, and also addresses the institutional dimension of NATO, the EU and regional cooperation formats. In this way, it aims to deliver practical recommendations for strengthening security and leveraging cooperation potential–primarily within NATO and the EU. The report's ambition is not merely to describe the status quo, but also to analyse medium and long-term trends. This provides a basis for identifying key areas for the development of military capabilities in the BSR, as well as priorities for building resilience (including the protection of critical infrastructure) and for strengthening regional mechanisms for coordination, cooperation, and deci-

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sion-making in the security domain. The authors assume that the effectiveness of any response to Russia's actions and those of other external actors depends not only on the scale of forces and resources committed, but also on the ability to utilise them in a coordinated manner across the region. Security policy in the BSR therefore requires a coherent, multi-level strategy encompassing national, allied and regional dimensions and engaging diverse institutions.

The thematic scope of the report covers the most important dimensions of BSR security. It includes military factors such as the military potential of regional states (including the size of armed forces, their geographical deployment, technical modernisation plans and readiness levels), as well as non-military factors related to resilience against hybrid threats—with particular emphasis on critical infrastructure. This is complemented by an analysis of the region's energy and environmental security, including the consequences of moving away from imports of Russian raw materials, the growing importance of the Baltic as an energy-import corridor for Central and Eastern Europe, the increasing vulnerability of energy infrastructure to hostile actions, and the implications of intensified commodity transport, "shadow fleet" activity and accelerated climate change for the Baltic's sensitive ecosystem.

In the next section, the report focuses on institutional responses to the threats identified and assesses the extent to which current and planned measures by NATO, the EU and regional cooperation formats—such as NORDEFCO, NB8 and the Council of the Baltic Sea States—address the fundamental changes in the security situation after 2022. Another important element is a discussion of prospects for transatlantic co-operation with the region, including the evolution of the US and Canadian military presence and their role in deterring Russia and protecting maritime lines of communication.

The report concludes with a recommendations section presenting a set of proposals to strengthen military capabilities and the civil resilience of BSR states. This includes both the development of national and allied defence capabilities (including in the maritime, air and cyber domains) and measures to increase resilience to hybrid threats, as well as to strengthen energy security and the protection of critical infrastructure.

The report formulates five key research questions:

1. How has the region's security level changed after 2022?
2. What impact do NATO and EU initiatives have on the region's security level?
3. What impact do the BSR states and their transatlantic partners have on the region's security level?

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4. Which factors will have the greatest influence on shaping regional security over the next five years?

5. Which actions—at the national, allied and EU levels—can most effectively strengthen defence and deterrence capabilities, and the resilience of the BSR?

To answer these questions, the report uses qualitative research complemented by quantitative data analysis. The qualitative research is based on a review of strategic documents, expert reports and threat assessments published by the intelligence agencies of regional states. The quantitative data used are sourced from intelligence reports and databases made available by international institutions, enabling the identification of trends in military potential, the intensity of activity by hostile actors, the scale of hybrid attacks, and changes in the energy policy of BSR states. This methodology makes it possible to capture the dynamics of change more fully and to formulate recommendations that follow directly from them.

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Regional Threats, Global Significance

Military Challenges

Filip Bryjka

The main military challenge in the BSR is Russia's revisionist policy, which poses an existential threat to both the Baltic states as well as the European and transatlantic security architecture. Just before the invasion of Ukraine, in December 2021, Russia demanded that NATO and the US withdraw their troops and military infrastructure from countries that had joined the Alliance after 1997. Failure to comply with this ultimatum would result in Russia taking "military-technical" measures—a few weeks later, Russia launched a full-scale invasion of Ukraine. Four years after its commencement, Russia continues to return to these demands, the fulfilment of which would primarily have consequences for the BSR countries—it would make it easier for Russia to re-establish a "buffer zone" in Central Europe, deprived of the possibility of receiving military assistance from the US and other Alliance member states in the event of aggression. Although Russia is trying to achieve this goal through hybrid aggression and negotiations with the US, it may resort to military force in the future. The risk of direct confrontation between NATO and Russia would increase if Ukraine's defences collapsed or the war ended on terms imposed by Russia. Subjugating Ukraine would allow Russia to concentrate its military resources and offensive plans on the countries of the Alliance's north-eastern flank. According to the intelligence services of the Baltic and Nordic states, within 3-5 years, Russia will have credible capabilities to conduct offensive operations against one or more countries in the region.[1]

The rhetoric of the Russian authorities towards the Baltic states and Finland has been escalating in recent years, accusing them of "Nazification," "Russophobia" and "violating the rights of Russian-speaking minorities," replicating the disinformation cam-

[1] See: M.A. Piotrowski, "Baltic and Nordic States Assess the Russian Military Threat," *PISM Bulletin*, No. 45 (2546), 9 May 2025, www.pism.pl.

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paign model that Russia conducted against Ukraine to justify its seizure of Crimea, provoke war in Donbas, and ultimately to launch a full-scale invasion. Since 2022, representatives of the security services, including Sergei Naryshkin, the head of the Russian Foreign Intelligence Service (SVR), have repeatedly made statements expressing Russia's territorial claims against the Baltic states and Finland, referring to them as "historical Russian lands." They have also sharply criticised the policy of supporting Ukraine and described the increase in defence spending as "militarisation threatening Russia's strategic interests." These narratives, combined with efforts to delimit coastlines in the Gulf of Finland and the unlawful removal of border buoys on the Narva River between Estonia and Russia, indicate that these issues may be used in the future as a pretext for aggressive actions against the Alliance.

Most importantly, however, since 2022, Russia has taken systematic steps to strengthen its military capabilities, indicating that it is preparing for a potential armed conflict with NATO. Despite the current concentration of military resources on the war in Ukraine, Russia is expanding its armed forces to 1.5 million troops,[2] creating reserves, increasing military spending[3] and expanding its defence industrial base, as well as forming additional forces and assets near the borders with NATO's north-eastern flank. According to official data, in 2025, Russia allocated an unprecedented $183 billion to security and defence, accounting for 41% of the entire state budget. In 2026-2028, these figures are expected to remain at a similar level.[4] In 2025, Russia managed to increase its production of artillery ammunition to over seventeen times (to 7 million rounds per year) its 2021 level (400,000 rounds per year), which will allow it to become independent of supplies from North Korea and Iran (approx. 5-7 million units obtained since 2023). According to Estonian intelligence, the rebuilding of Russian artillery stocks is not limited to the needs of the war in Ukraine (10-15,000 units per day), but is being accumulated for the needs of another war.[5] A cessation of fighting in Ukraine is unlikely to lead to a slowdown in arms production. The prospect of Western sanctions being lifted–which Russia is counting on in its negotiations with the US–will help the Russian economy (currently in a state of stagnation), allowing it to increase military production capacity, which will heighten the risk of direct confrontation with NATO.

2 See more: A.M. Dyner, "Russia's Armed Forces Two Years After the Full-Scale Invasion of Ukraine," *PISM Strategic File*, No. 4 (138), February 2024, www.pism.pl.

3 F. Bryjka, "Russia Seeks Victory in Growing Military Spending," *PISM Bulletin*, No. 190 (2498), 18 December 2024, www.pism.pl.

4 In previous years, defence spending was much less: $61 billion (2020), $65 billion (2021), $82 billion (2022), $109 billion (2023), see: B. Grozovski, "Putin's War Economy Reaches Limit," *Important Stories*, 2 October 2025, www.istories.media.

5 *International Security and Estonia 2026*, Estonian Foreign Intelligence Service, February 2026, pp. 57-58, wwww.raport.valisluureamet.ee.

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In response to Finland and Sweden joining NATO, in 2023 Russia decided to disband the Western Military District (MD), replacing it with the Moscow and Leningrad MDs. The former covers the territory of Russia bordering Belarus and Ukraine. It includes, among others, the 1st Guards Tank Army, the 20th Combined Arms Army, the 98th and 106th Airborne Divisions, the 16th Spetsnaz Brigade, as well as a missile brigade, radio-electronic warfare brigade, communications brigade and logistics brigade. Their current personnel strength is not publicly known, but is most likely limited due to constant rotations to the front, plus personnel and equipment shortages. Due to the crucial importance of these units for the defence of Moscow, once hostilities in Ukraine cease, they will most likely be the first to be replenished.

Some units of the Moscow Military District are also part of the Regional Forces Group (RFG) of Russia and Belarus, which is a tool for exerting pressure on NATO and poses a potential threat to Poland, Lithuania, and Latvia. Formally, its task is to protect the Union State of Belarus and Russia, but in practice, it subordinates the Belarusian armed forces to Russian command. The units making up the RFG train regularly, and the biggest tests of their capabilities are the Zapad and Union Shield manoeuvres, conducted alternately every two years. These scenarios are offensive in nature, especially directed towards Poland and Lithuania.[6]

The operational and strategic area of responsibility of the Leningrad Military District focuses on NATO and covers the territory of Russia bordering the Baltic states, Poland, Finland and Norway. In 2024, a new 44th Army Corps was established in Petrozavodsk (Karelia) on the border with Finland, consisting of motorised, airborne and missile units, among others. The 6th Combined Arms Army in Agalatovo was reinforced with two new motorised rifle divisions (the 68th in Luga and the 69th in Kamenka), which are stationed near the border with Estonia. The Leningrad Military District also includes two army corps—the 11th stationed in the Kaliningrad Oblast and the 14th (Arctic) in Murmansk. Soldiers from the new units are fighting on the Ukrainian front and in the Kursk Oblast, where they are suffering heavy losses but also gaining combat experience.[7] At the end of December 2025, Russian Defence Minister Andrei Belousov announced that the 336th Marine Brigade of the Baltic Fleet in the Kaliningrad Oblast had been transformed into a division.[8] Soldiers from this unit could potentially be used for offensive operations against BSR countries. By the end of 2027, the 61st Brigade of the Northe-Fleet will also undergo reorganisation.

6 See: A.M. Dyner, "Belarus Announces the Formation of a Regional Forces Group with Russia," *PISM Spotlight*, No. 132/2022, 18 October 2022, www.pism.pl.

7 "International Security and Estonia 2025," Estonian Foreign Intelligence Service, pp. 7-10, https://raport.valisluureamet.ee/2025/en/.

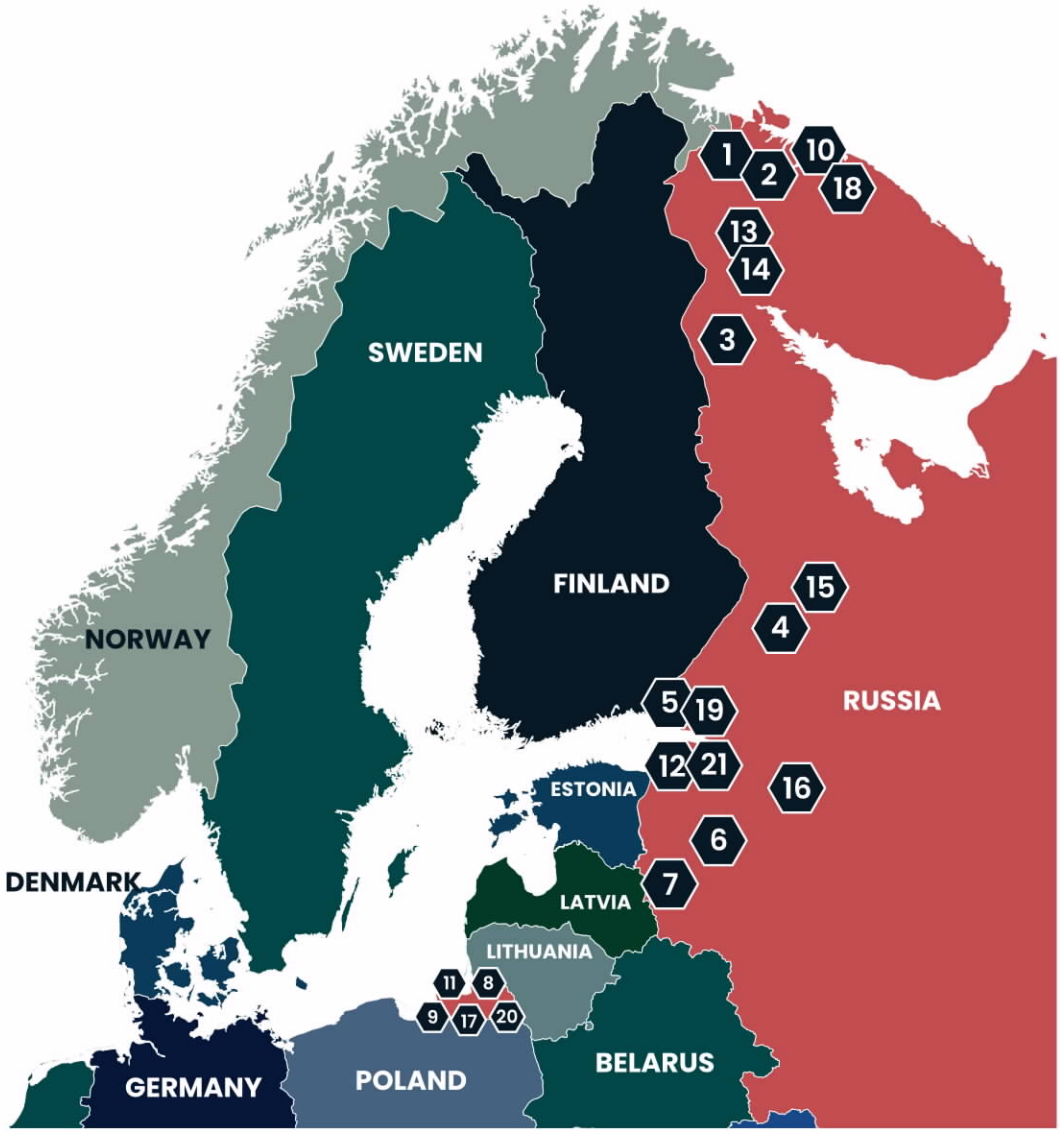
8 'В Калининградской области бригаду морской пехоты усилили до дивизии,' ТАСС, 22 December 2025, www.tass.ru.

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Map 1

Deployment of the main tactical units of the Russian army



1. 71st Guards Motor Rifle Division (14th Army Corps)
2. 61st Naval Infantry Brigade
3. 80th Separate Arctic Motor Rifle Brigade (14th AC)
4. 44th Army Corps (LEMD)
5. 69th Guards Motor Rifle Division (6th Army)
6. 68th Guards Motor Rifle Division (6th Army)
7. 76th Guards Air Assault Division
8. 18th Guards Motor Rifle Division (11th AC)
9. 336th Guards Naval Infantry Brigade
10. Northern Fleet
11. Baltic Fleet main naval base
12. Baltic Fleet Leningrad naval base
13. Olenya air base
14. Monchegorsk air base
15. Besovets air base
16. Khotilovo air base
17. Chkalovsk air base
18. 14th Army Corps (LEMD)
19. 6th Army (LEMD)
20. 11th Army Corps
21. Leningrad Military Discrict (LEMD) Headquarters

Own elaboration based on *Focus 2025: the Norwegian Intelligence Service's assessment of current security challenges*, pp. 12-13, 10.02.2025, https://www.havtil.no/en/

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A military challenge for NATO in the maritime domain is posed by the capabilities of the Baltic and Northern Fleets, which, in addition to increased reconnaissance activity, are involved in escorting "shadow fleet" tankers used to circumvent sanctions and sabotage. Unlike land forces, which have suffered heavy losses in the war in Ukraine, the military potential of the navy (with the exception of the Black Sea Fleet) remains intact. In the event of a conflict with NATO, one of the tasks of the Baltic Fleet, which has 54 combat ships (including 15 landing ships, 13 missile ships, 10 mine countermeasure ships, 7 corvettes, 2 frigates, a destroyer and a submarine), would be to occupy or block the Danish Straits to prevent the Alliance from using the sea lanes between the Baltic and the North Sea. At the same time, the Russian navy would conduct much more extensive diversionary and sabotage operations against critical maritime infrastructure (including communication cables, pipelines and ports), which could lead to serious disruptions in communication and energy supplies. It would also support land operations with missile strikes, including the use of Kalibr-NK missiles, which have a range of at least 1,500 km. Russia's anti-access/area denial (A2/AD) capabilities in the BSR also include Bastion systems with Onyx missiles (450 km) and Iskander-M missile systems (500 km) capable of carrying tactical nuclear weapons.

As a result of the armed forces reform in 2023, the Baltic Fleet was placed under the direct command of the Navy. The Northern Fleet, which had its own command since 2019, was transformed into a separate military district, which indicates its growing operational and strategic importance. Its main task is to provide strategic deterrence against NATO countries and control maritime communication lines in the High North. It consists of nearly 70 combat ships (including 26 submarines), which will be reinforced by the end of 2026 with three modern multi-purpose submarines of the Severodvinsk/Yassen class and three frigates armed with Zircon hypersonic missiles. The modernised Kirov II-class cruiser Admiral Nakhimov (armed with Kalibr and Zircon missiles) may enter service at the end of 2026, becoming the new flagship of the Russian Navy. Until then, it will continue sea trials and weapons testing. In the coming years, the Northern Fleet is also to receive a modernised Akula I-class submarine and six conventional Kilo II-class submarines (all armed with Kalibr missiles).[9]

The Northern Fleet plays a key role in the realisation of Russia's ambitions in the Arctic, which is a priority in Russia's 2022 Maritime Doctrine. In addition to its natural resources, the region is of strategic importance for maritime transport routes (the Northern Sea Route), making it the subject of rivalry between the West, Russia and China, which are strengthening their military cooperation in the Baltic Sea and the Arctic. Since 2019, the air forces of both countries have been conducting joint patrols and strategic bomber

[9] Focus 2026: *The Norwegian Intelligence Service's assessment of current security challenges*, Norwegian Intelligence Service, 6 February 2026, p. 29, www.etterretningstjenesten.no.

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flights near Alaska. Their navies regularly conduct exercises in the Baltic Sea and the North Pacific. In October 2024, the coast guards of both countries conducted their first joint patrol in the Arctic,[10] and a year later, China sent its first container ship to Europe via the Northern Sea Route.[11] China is expanding its fleet of polar research vessels, ice-breakers, and submarines. China's ambitions in the Arctic are not limited to economic considerations, but also include the development of military capabilities, which China plans to achieve within 5-10 years and which are linked to its strategic rivalry with the US.[12]

For over a decade, Russia has been consistently strengthening its military capabilities in the High North, where it is expanding its military infrastructure (including airports), creating new units, installing weapon systems (surface-to-surface and surface-to-air missiles) and radar stations. Russia is also focusing on securing coastal areas and developing the operational concept of "bastions," which involves ensuring freedom of action for the Northern Fleet (especially submarines carrying ballistic missiles, SSBNs) to prevent NATO units from approaching areas that would allow them to effectively strike targets deep inside Russia. It is also developing its maritime capabilities to allow long-distance attacks on targets. However, its ambitions are limited by the high costs of building new ships, the high workload of the industry, personnel shortages and weaknesses in threat detection and anti-submarine warfare.

Russian aviation poses a challenge for NATO in the Arctic, including Su-33, Su-25, MiG-29 and MiG-31 fighter jets, Su-24 bombers, and Il-38, Tu-142 and Ka-27/Ka-29 anti-submarine aircraft and helicopters. From a military point of view, the Arctic provides the shortest flight route for Russian aircraft and ballistic missiles to the US. Arctic military infrastructure provides strategic cover for Northern Fleet submarines armed with intercontinental ballistic missiles (ICBMs) with nuclear warheads. These are fundamental elements of Russia's nuclear triad and its psychological influence on the West.[13] Currently, the importance of the land component of Russian Arctic forces, consisting of the 61st Marine Brigade in Sputnik (to be transformed into a Division), the 71st Motorized Rifle Division (formed from the 200th Motorized Rifle Brigade) in the Pechenga Valley

10 M. Boulègue, "Sino-Russian Cooperation in the Arctic," CEPA, 8 July 2025, www.cepa.org.

11 The container ship Istanbul Bridge set sail on 23 September 2025 from the port of Ningbo-Zhoushan in Zhejiang Province in eastern China. It sailed along the northern coast of Siberia through the Arctic Ocean. During its journey, it called at several European ports (including Felixstowe in the United Kingdom, Hamburg in Germany and Gdańsk in Poland, where it arrived after a 26-day voyage), see: "First container ship on China-Europe Arctic route arrives in Gdansk, Poland," *People's Daily One*, 20 October 2025, www.en.people.cn.

12 *Intelligence Outlook 2025*: *An intelligence-based assessment of the external conditions for the security of the Kingdom of Denmark*, Danish Defense Intelligence Service, December 2025, p. 37, www.fe-ddis.dk/globalassets/fe/dokumenter/2025/-fe-intelligenceoutlook-25-.pdf.

13 "Focus 2025: the Norwegian Intelligence Service's assessment of current security challenges," Norwegian Intelligence Service, pp. 23-27, www.etterretningstjenesten.no.

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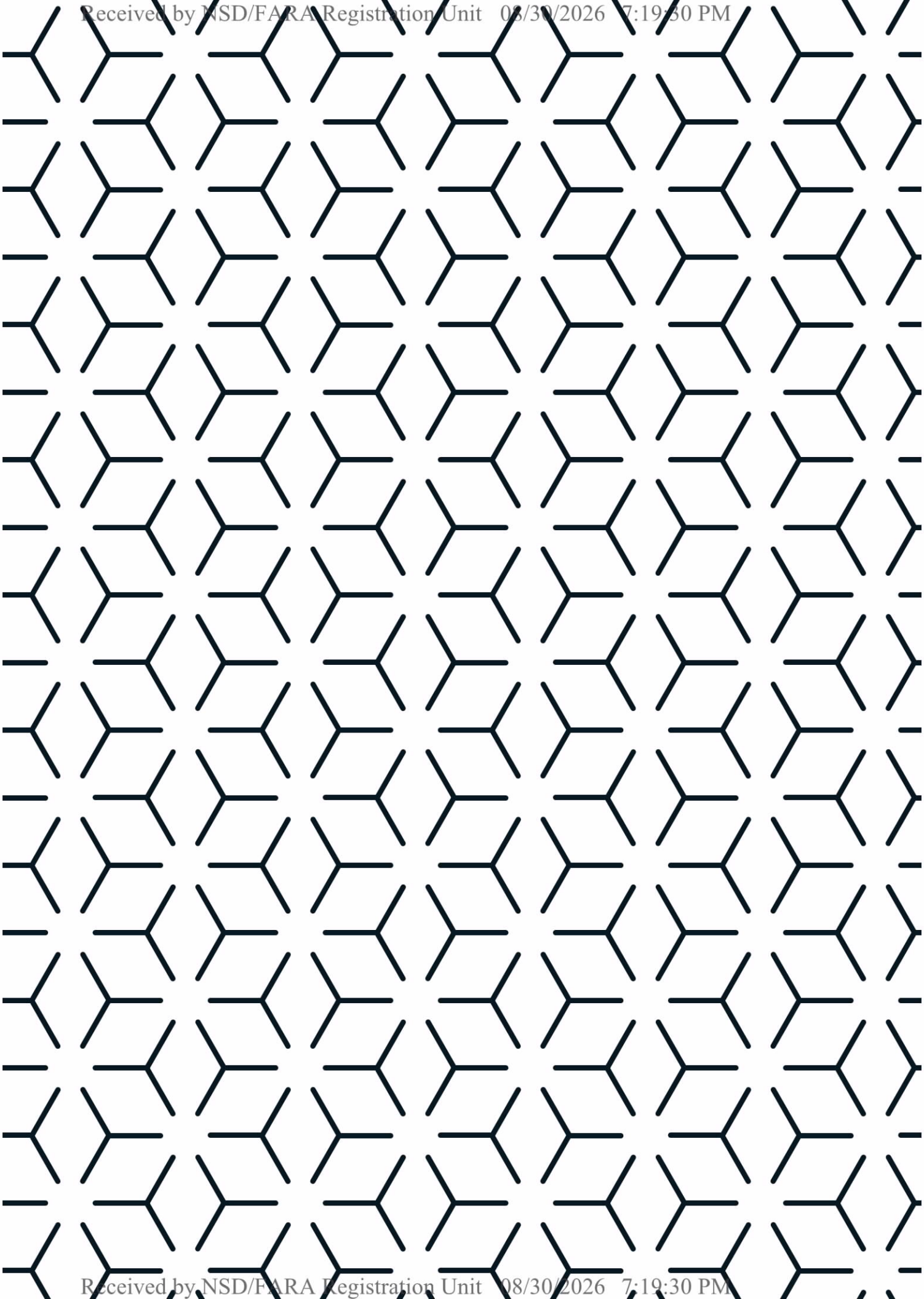
and the 80th Motorised Rifle Brigade in Alakurtti, is insignificant, as approximately 80% are currently engaged in the war in Ukraine, where they are suffering heavy losses.[14]

Although the military threat to the BSR is increasing, the likelihood of a conventional attack by Russia in the near term (2-3 years) remains low, as long as Russia continues to focus its forces and resources on the war in Ukraine. A more likely scenario is a further intensification of Russian aggression below the threshold of war, which is intended to gradually erode security in the region and undermine allied solidarity. An intermediate option could be for Russia to conduct a limited military operation against one or more NATO countries using proxy forces, similar to the annexation of Crimea or the war in Donbas. This could primarily affect Estonia or Latvia, which are home to large Russian-speaking communities (approximately 30% and 35%, respectively). In the north, a potential target could be Norway's Svalbard, which remains a demilitarised zone where Russia has its mining settlements of Pyramiden and Berentsburg. Another sensitive point is the Suwalki Gap on the Polish-Lithuanian border, which separates Kaliningrad Oblast from Belarus. By occupying a small part of the Alliance's territory (e.g. Narva in Estonia, Latgale in Latvia or the Suwalki Gap on the Polish-Lithuanian border), Russia could renew its December 2021 demand and attempt to cause serious division among the allies in their assessment of the situation and how to respond. By manipulating the threat of escalation with the use of nuclear weapons, it would seek to influence the calculations of some countries and undermine the credibility of Article 5 of the North Atlantic Treaty on collective defence. An insufficiently decisive response from NATO (especially a passive stance taken by the US) could encourage Russia to further escalate.

14 A. Edvardsen, B.A. Hansen, "Russia's Forces in the High North: Weakened by the War, Yet Still A Multidomain Threat," *High North News*, 12 January 2024, www.highnorthnews.com.

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Hybrid Warfare

Filip Bryjka

Russia's readiness to escalate tensions in the BSR is confirmed by its hybrid aggression against countries on NATO's north-eastern flank. This includes cyberattacks, acts of diversion and sabotage, the instrumentalisation of migration, reconnaissance of civilian and military critical infrastructure, damage to underwater pipelines and cables using a "shadow fleet," as well as deliberate and systematic violations of air and maritime space. These actions are directly linked to Russia's invasion of Ukraine and are intended to increase the political, social and economic costs of Western support for Ukraine. Russia is also attempting to instil fear and cause indecision within NATO and the EU in order to undermine their ability to respond quickly and effectively to Russian provocations.

According to research conducted by the International Centre for Counter-Terrorism (ICCT) and GLOBSEC, between January 2022 and the end of July 2025, Russia carried out 110 acts of sabotage on EU territory (89 successful and 21 foiled). More than half of these (59 incidents) took place in the BSR countries.[15] Russia carries out these activities through "disposable agents," untrained amateurs recruited via social media (especially channels on the Telegram app) who, in exchange for financial rewards, carry out tasks assigned by Russian intelligence. Most of them are young, Russian-speaking individuals living in the EU and able to move freely within the Schengen zone,[16] which gives the problem a cross-border dimension. The Russian recruitment base also includes criminal circles,[17] martial arts clubs, football fans, and far-right radicals in Europe and the US.[18] Lithuanian authorities have also noted an increased number of recruitment attempts among teenagers.[19]

15 The most in Poland (20), 11 each in Germany and Estonia, 9 in Lithuania, 3 in Latvia, 2 each in Sweden and Finland, 1 in Denmark, see: D. Hajdu (ed.), "Russia's Crime–Terror Nexus: Criminality as a Tool of Hybrid Warfare in Europe," International Centre for Counter-Terrorism/Globsec, September 2025, pp. 18-19, www. globsec.org.

16 According to Latvian security services, the typical profile of those recruited by Russian intelligence for sabotage activities is: citizens of Ukraine, Belarus and Russia aged 19–40 years of age, financially motivated, with a criminal past or contacts in criminal circles, low socio-economic status and a lack of moral values, without permanent employment or income, excessive consumers of alcohol or other intoxicants, often supporting Russia and sharing the worldview promoted by it, see: "Latvian State Security Service," *Annual Report for 2024*, 2025, p. 9, https://vdd.gov.lv/.

17 M. Galeotti, "Gangsters at War: Russia's use of organized crime as an instrument of statecraft," Global Initiative Against Transnational Organized Crime, November 2024, www.globalinitiative.net.

18 Д. Беловодьев, 'Ваше сообщение отправлено в ГРУ'. Как военная разведка совместно с неонацистом "Топазом" создает телеграм-ботов для вербовки диверсантов," *Настоящее Время*, 25 September 2025, www.currenttime.tv.

19 'Граждане третьих стран должны будут сообщать о цели визита в Латвию, решила комиссия Сейма,' *Delfi*, 23 March 2025, www.delfi.lt.

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The tasks undertaken vary in terms of sophistication and harmfulness—from acts of vandalism (e.g. painting propaganda slogans, destroying monuments and cultural objects), through the use of violence (assaults, destruction of property, attempted murder), to reconnaissance activities using cameras and drones (including ports, military bases, and railway lines used to transport military aid to Ukraine), and sabotage (e.g. arson using flammable and explosive materials). According to research by the ICCT and GLOBSEC, arson and attacks using explosives were the most common (34), accounting for about a quarter of all incidents. These were followed by acts of vandalism (27), sabotage (21), and public disorder (20).[20] These incidents commonly intensify at times when NATO countries are discussing aid to Ukraine. By signalling its readiness to escalate the conflict and extend it to the territory of countries supporting Ukraine, Russia is trying to put pressure on the Alliance countries to stop them from supplying further types of weaponry (tanks, aircraft, air defence systems or long-range missiles).[21]

Table 1

Examples of sabotage incidents, carried out and prevented

Acts of vandalism	**May 2023**	Destruction of monuments commemorating fighters who fought against the Soviet occupation in Lithuania, Latvia and Estonia
	Turn of 2023/2024	Arrest of 13 people by the Estonian security services (KAPO) for desecrating national memorial sites
	February 2024	Attempted arson of the Museum of Occupation in Latvia
Acts of violence	**December 2023**	Destruction of the car belonging to the Estonian Minister of the Interior, Lauri Läänemets, and the editor-in-chief of the Russian version of the Delfi portal
	March 2024	Beating of Leonid Volkov, a close associate of Alexei Navalny, in Lithuania
Cyberattacks	**February 2023**	DDoS cyberattack on Copenhagen Airport (Denmark)
	March 2024	Massive DDoS attack on government websites in Estonia
	August 2025	Cyberattack on a dam in Norway

20 D. Hajdu (ed.), "Russia's...," op. cit.

21 G. Spatafora, "The Red Line Playbook: Understanding and neutralising Russian escalation threats," in: O. Ditrich, S. Everts (ed.), "Unpowering Russia: How the EU can counter and undermine the Kremlin," *Chaillot Paper*, No. 186, May 2025, European Union Institute for Security Studies, pp. 64-71, www.iss.europa.eu.

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Arson	**May 2023**	Arson attacks on an Ikea warehouse in Vilnius (Lithuania) and a shopping centre at 44 Marywilska Street in Warsaw (Poland)
	February 2024	Prevention of an arson attack on a paint factory in Wroclaw (Poland)
Assassinations	**April 2024**	Foiled preparations for the assassination of Armin Papperger, director of Rheinmetall, a company supplying ammunition to Ukraine
	April 2024	Foiled preparations for the assassination of Ukrainian President Volodymyr Zelensky at the airport in Rzeszów (Poland)
	October 2024	Breaking up a network of saboteurs preparing attacks using flammable materials on planes carrying parcels from Lithuania, Poland, Germany and the UK to the US and Canada
Critical infrastructure	**March 2025**	Damage to power cables supplying the pump system on Gotland (Sweden)
	August 2025	Arrest of a Ukrainian citizen for preparing an attack on the water distribution system in Sopot (Poland)
	September–November 2025	Numerous cases of drones being used to paralyse the functioning of airports in Denmark, Norway, Germany and Lithuania, among others
	November 2025	Blowing up the railway tracks between Warsaw and Lublin (Poland)
Sabotage in the military	**April 2024**	Foiling of attacks on US military bases in Germany, where Ukrainian soldiers are being trained
	February 2025	Damage to the propulsion system of the corvette Emden, built in a Hamburg shipyard for the German Navy
	February 2025	Contamination of the water system on the Hessen frigate belonging to the German Navy
Sabotage at sea	**October 2023–December 2024**	Damage to 11 submarine communication cables and pipelines in the Baltic Sea by the "shadow fleet"

Own elaboration based on H. Praks, "Russia's hybrid threat tactics against the Baltic Sea region: From disinformation to sabotage," Hybrid CoE Working Paper 32, May 2024, www.hybridcoe.fi; M. Ålander, P. Oksanen, "Tracking the Russian Hybrid Warfare—Cases from Nordic-Baltic countries," Frivärld, 27 May 2024, www.frivarld.se; and own research

Since 2022, Russia has also been engaging in numerous hostile military actions against BSR countries, which are kept below the threshold of war but carry the risk of escalation. Examples include violations of NATO airspace, i.e. low-altitude flights by Russian military aircraft near critical infrastructure (including oil rigs and wind farms) or Alliance

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warships. A growing problem is the use of drones to reconnoitre critical infrastructure and paralyse the functioning of some of them (especially airports). Although they are a constant element of Russian hybrid activity, their intensity and offensive nature have increased significantly in recent times. In September alone, there was a series of incidents in the airspace of the BSR countries. On the night of 9-10 September, Russia sent at least 21 drones into Polish territory, forcing the allied air force to respond and neutralise the threat. These actions were accompanied by a disinformation campaign suggesting Ukrainian provocation aimed at drawing NATO into a war with Russia. On 19 September, three Russian MiG-31 fighter jets carried out an unprecedented violation of Estonian airspace (approx. 12 minutes long) near the island of Vaindloo in the Gulf of Finland. On the same day, two Russian fighter jets flew at low altitude over the Lotos Petrobaltic drilling platform located in Poland's exclusive economic zone in the Baltic Sea. In the following days, a Russian Il-20 reconnaissance aircraft was intercepted by Swedish and German fighter jets over the Baltic Sea, and the US Air Force intercepted a Russian Tu-95 bomber and two Su-35 fighter jets near Alaska. At the same time, airports in Denmark, Norway, Germany and Lithuania were temporarily closed due to activity by drones that had been sent there on Russia's orders.

Another element of Russian hybrid activities that carries the risk of escalation is the use of electronic warfare (EW) systems to jam GPS signals and spoof them by providing false positions. In Estonia, 85% of civil flights have experienced signal interference, and the number of cases of coordinate spoofing has increased significantly. Lithuania has seen a 22-fold increase in such incidents over the course of a year.[22] Russia's intensification of GPS signal jamming not only hinders air and maritime communications but also creates the risk of serious accidents. In 2025, the BSR states recorded a significant increase in the presence and intensity of Russian ECM and electronic reconnaissance (ELINT) activities from the Kaliningrad region.

Russian hybrid activities also extend to the maritime domain. Since October 2023, Russia has used ships from its "shadow fleet" to damage 11 undersea cables and pipelines in the Baltic Sea. The tactic of dragging anchors along the seabed was adopted from China, which uses it against Taiwan. In October 2023, the Chinese container ship Newnew Polar Bear (operated by a Russian crew) damaged the Balticconnector gas pipeline (transporting gas to Finland) and the adjacent fibre optic cable connecting Sweden and Estonia. After the incident, it quickly left the Baltic Sea with the support of a Russian icebreaker and permission to transit the Northern Sea Route. In November 2023, the Chinese ship Yi Peng 3 damaged fibre optic cables between Finland and Germany and between Sweden and Lithuania. One of the most recent Baltic Sea incidents was the damage to the Estlink 2 power cable between Finland and Estonia,

22 M. Seputyte, O. Tammik, A. Eglitis, "Baltic States Seek to Fight Back Against Russian Signal Jamming," Bloomberg, 23 August 2025, www.bloomberg.com.

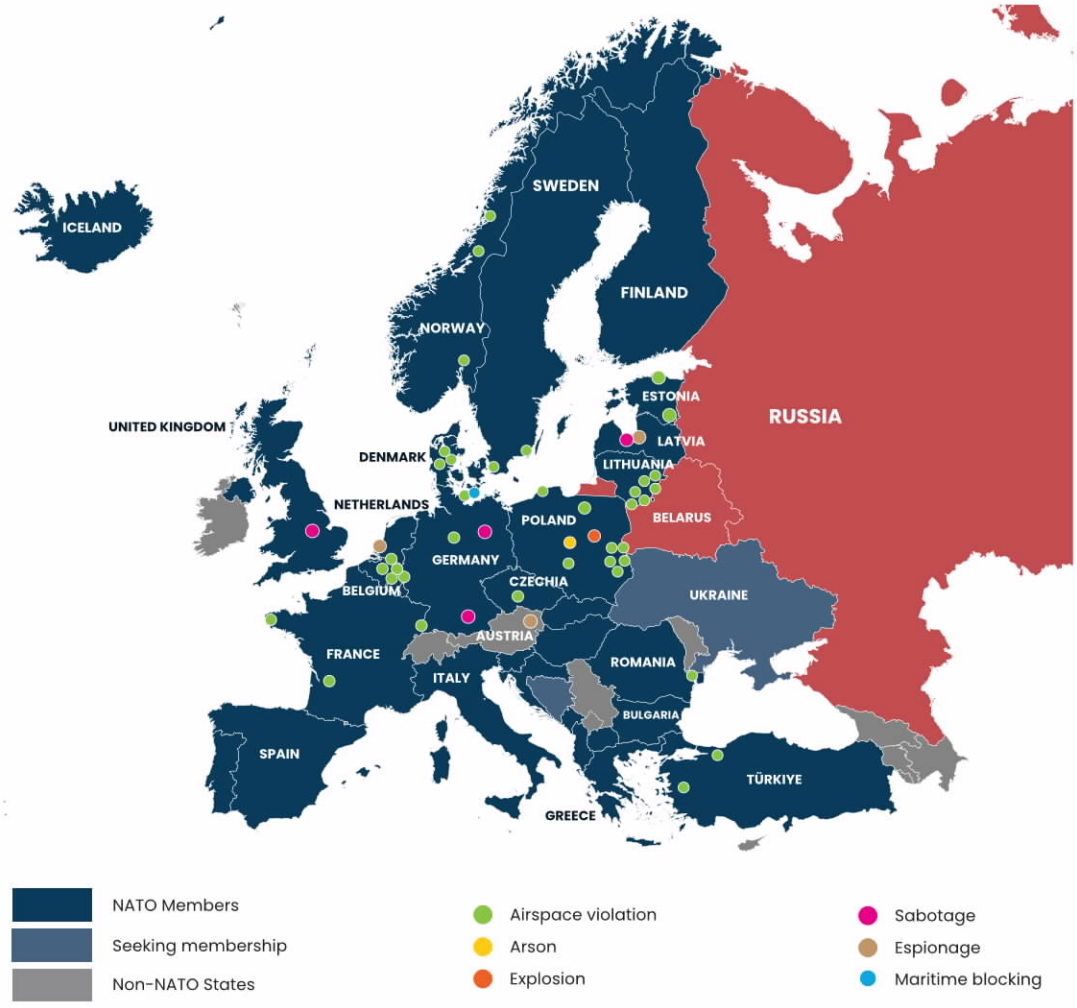
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which led to the detention of the crew of the tanker Eagle S by the Finnish Navy. In addition to the costs associated with repairing the infrastructure (between $645,000 and $1.29 million per incident),[23] the BSR countries suffered financial losses due to the disruption of energy supplies.

Map 2

Russian hybrid operations in Europe (9 September 2025 to 29 January 2026)



Own elaboration based on Institute for the Study of War

Russia's maritime sabotage activities are not limited to the Baltic Sea. Many hybrid methods (including cutting undersea cables and jamming GPS signals) have previously been tested in the vicinity of the Norwegian archipelago of Svalbard in the Arctic. Russia has been signalling its claims to this area for years by, among others, organ-

23 "Strengthening resilience to secure Europe's submarine cables," *Monthly Executive Briefing*, Global Security and Innovation Summit, 19 June 2025, www.gsis-hamburg.com.

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ising historical and propaganda events in Russian mining settlements in Barentsburg and Pyramiden.

Since 9 May 2023, a military-style parade commemorating "Victory Day" is held on Svalbard, during which, in addition to Russian flags, flags of the "Donetsk People's Republic" flows. In July, similar celebrations take place during the Russian Navy Day.[24] Intensified activities are also taking place in the strategic GIUK area between Greenland, Iceland and the United Kingdom, where, in addition to mapping IK, the Russian fleet is observing the activity of submarines that are part of NATO's nuclear deterrent. By focusing the attention of NATO navies on countering the "shadow fleet," Russia is absorbing Alliance resources that cannot be used at the same time in other, more difficult to access areas, such as tracking Russian fleet activity in the High North.

24 M. Ålander, P. Oksanen (ed.), op. cit., p. 22; see more: K.A. Myklebost, S. Bones, T. Nilsen, "Hybrid threats in high latitudes: Facing Russia on Svalbard," *Hybrid CoE Paper 26*, December 2025, www.hybridcoe.fi.

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Energy Security

Tymon Pastucha

Following Russia's full-scale invasion of Ukraine in 2022, the importance of the Baltic Sea for the energy security of the region's countries increased markedly. Two parallel processes have accelerated. The first is the increased import of energy commodities by sea, driven by the region's shift away from imports by land from Russia. The second is the acceleration of the energy transition and the electrification of regional economies, involving broader use of the Baltic Sea for trade and electricity generation, including offshore wind farms and nuclear power. This includes the deployment of modern, low-emission technologies, such as energy storage, carbon capture, utilisation and storage (CCUS), and low-emission hydrogen production. However, Russia's increasingly aggressive actions are also leading to a growing number of incidents that endanger energy infrastructure and maritime oil and gas shipments in the region.

For many years, Russia was the main supplier of energy commodities and electricity to most countries in the BSR. However, following the sanctions policies adopted by EU Member States and the EU, as well as Russia's hostile actions, all countries in the region ended imports of Russian crude oil, petroleum products, coal and gas between 2022 and 2024 (see: Table 1). One particularly acute challenge was Gazprom's unilateral suspension of gas deliveries via the Yamal pipeline in spring 2022, which exacerbated the energy crisis of 2021–2023. This confirmed Russia's continued use of energy commodities as an instrument of foreign policy. Ultimately, however, Russia's tactics proved ineffective, as the region was highly flexible and willing to absorb the increased costs of supply diversification. The impact was short-lived, although it included a sharp surge in energy prices and elevated inflation.[25]

All countries in the region adapted rapidly to the new conditions, either by leveraging infrastructure developed in previous years—such as the Baltic Pipe, the GIPL interconnector and the LNG terminals in Świnoujście and Klaipėda—or by building new assets, such as the FSRU terminals commissioned in Lubmin and Inkoo in 2023. Consequently, the Baltic Sea has become the primary import route for energy commodities for the entire Central and Eastern European region, including Ukraine. The scale of this change can be seen in the data on Russian oil and gas imports before the invasion and in 2024 (see: Figures 1 and 2). In 2021, Russia accounted for 57% of imported gas (excluding Germany) and 35% of crude oil and petroleum product imports. After 2022, however, hydrocarbon imports from Russia ceased entirely.

25 A. Fan, B. Hu, S. Naik, N.C.G.M. Noumon, K. Primus, "High Inflation in the Baltics: Disentangling Inflation Dynamics and Its Impact on Competitiveness," *IMF Working Paper*, No. WP/2024/061, IMF, 15 March 2024, www.elibrary.imf.org.

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Table 2

Timeline of the phase-out of energy resources imports from Russia

DATE	COUNTRY	RESOURCE	EVENT
2022-04-02	**Lithuania**	Gas	The government ended Russian gas imports
2022-04-16	**Poland**	Coal	National ban on Russian coal
2022-04-27	**Poland**	Gas	Gazprom unilaterally cut off pipeline supplies via Yamal
2022-05-21	**Finland**	Gas	Gazprom unilaterally cut off pipeline supplies
2022-05-22	**Estonia, Latvia, Lithuania, Finland**	Electricity	Cessation of Russian electricity commercial imports
2022-06-01	**Germany/ Denmark**	Gas	Gazprom unilaterally cut off pipeline supplies to Ørsted and Shell for Germany
2022-06-28	**Lithuania**	LNG	Official ban on Russian LNG imports
2022-07-30	**Latvia**	Gas	Gazprom unilaterally cut off pipeline supplies
2022-08-10	**EU**	Coal	EU embargo on Russian coal
2022-08-31	**Germany**	Gas	Nord Stream 1 gas supplies suspended
2022-09-26	**Germany**	Gas	Nord Stream 1 and 2 sabotage
2022-09-29	**Estonia**	Gas	After reducing gas imports, Estonia banned buying natural gas and LNG from Russia
2022-12-05	**EU**	Seaborne oil	EU embargo—crude seaborne oil
2023-01-01	**Germany**	Pipeline oil	Ended Druzhba imports voluntarily
2023-01-01	**Latvia**	Gas	Statutory ban on Russian gas
2023-02-05	**EU**	Seaborne oil	EU embargo—oil products
2023-02-25	**Poland**	Pipeline oil	Russia stopped the flow to Poland via Druzhba
2025-01-01	**EU**	LPG	EU embargo—LPG

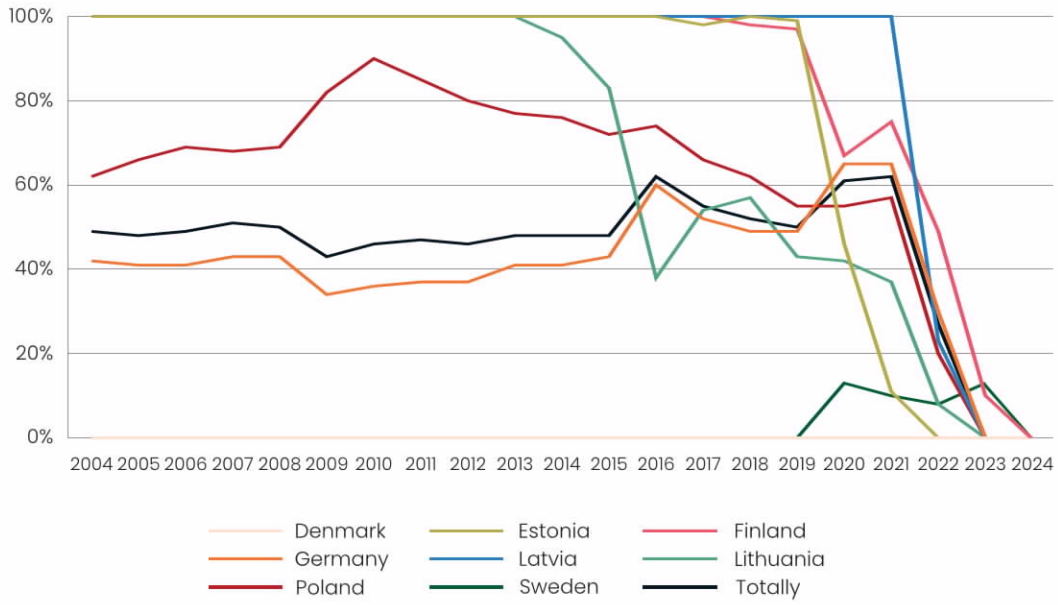
Own compilation based on Eurostat data

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Figure 1

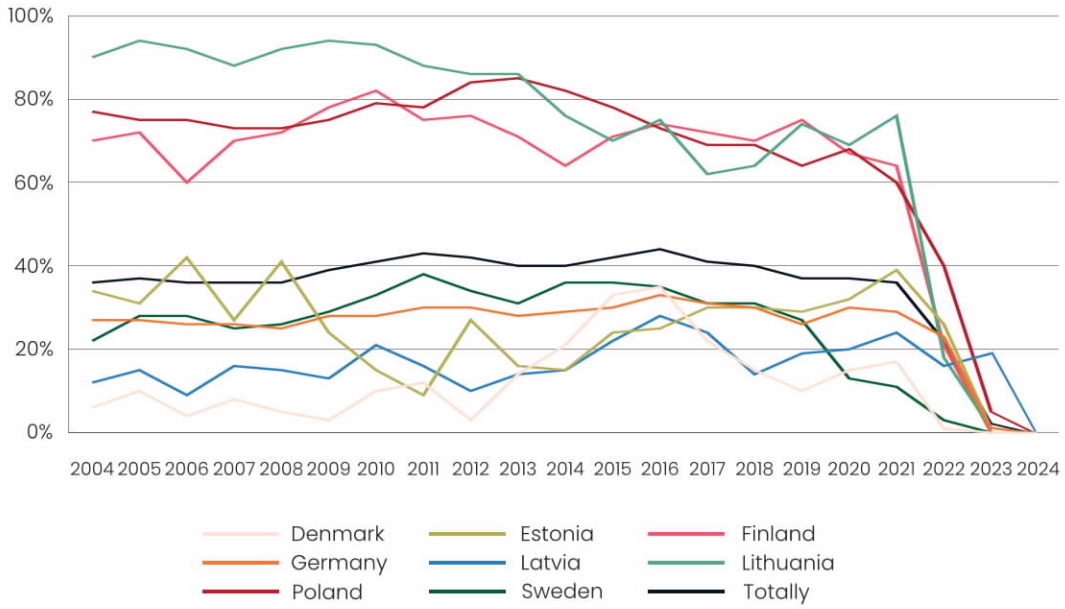
Share of gas from Russia in imports to BSR countries, 2004–2024



Own compilation based on Eurostat data

Figure 2

Share of oil from Russia in imports to BSR countries, 2004–2024



Own compilation based on Eurostat data

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In 2022, the countries of the region successfully diversified their energy resource supply sources and reduced their consumption. Most of them—including Poland, Finland, and the Baltic States (B3)—shifted almost entirely to Baltic-based transport routes, making use of LNG, oil, and fuel terminals, as well as pipeline infrastructure. Consequently, dependence on Baltic Sea infrastructure for key energy resources and carriers increased significantly relative to domestic consumption. In Poland, this indicator exceeded 48% (78% for gas and 90% for oil), and it is expected to rise to 60% by 2040 as coal is phased out and offshore wind farms are deployed. New supply routes are primarily established with allied countries such as the United States, the Netherlands, Canada and Norway, from which gas imports (e.g. via the Baltic Pipe) rose 2.5-fold to over 40% (Tables 2 and 3 illustrate detailed changes in consumption and import patterns by key suppliers).

These measures enabled the countries of the region to eliminate their dependence on Russia, an EU-hostile supplier whose oil and gas revenues finance the war in Ukraine, as well as hybrid operations and preparations for confrontation with NATO. Seaborne imports from allied suppliers and purchases in competitive global markets emphasised the importance of global maritime security, particularly in the Danish Straits. Protecting energy infrastructure (primarily ports, pipelines, and upstream assets) in the Baltic Sea and the North Sea also took on greater importance, as these areas supply a large proportion of imported hydrocarbons.

Table 3

Changes in gas consumption and imports in BSR countries

GAS SECTOR								
Year/ Country	Gas consumption (bcm)		Gas import from Russia (bcm, %)			LNG import from US (bcm, %)		
	2021	2024	2021		2024	2021	2024	
Denmark	2.26	1.57	0.00	0.0%	0	0	0	0%
Estonia	0.46	0.32	0.06	12.6%	0	0	0	0%
Finland	2.49	1.62	1.93	77.4%	0.06	0	0.39	0%
Germany	90.48	75.23	55.44	61.3%	0	0	6.01	8%
Latvia	1.13	0.84	1.13	100.%	0	0	0	0%
Lithuania	2.20	1.78	0.89	40.3%	0	0.94	1.40	79%
Poland	21.37	19.90	10.47	49.0%	0	1.59	3.75	19%
Sweden	1.18	0.89	0.12	10.2%	0.14	0.02	0	0%

Own compilation based on Eurostat data

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Table 4

Changes in oil consumption and imports in BSR countries

OIL SECTOR														
Year/ Country	Oil import		Oil import from Russia (Mt and %)				Oil import from the US (Mt and %)				Oil import from Norway (Mt and %)			
	2021	2023	2021		2023		2021		2023		2021		2023	
Denmark	9.92	9.86	1.70	17%	0,00	0%	2.12	21%	3.55	36%	1.72	17%	1.19	12%
Estonia	2.06	1.41	0.80	39%	0.01	1%	0,00	0%	0.02	2%	0.00	0%	0.00	0%
Finland	13.48	14.70	8.65	64%	0.02	0%	0.52	4%	1.80	12%	1.45	11%	8.37	57%
Germany	118.1	113.2	34.5	29%	0.89	1%	10.77	9%	15.65	14%	8.43	7%	14.40	13%
Latvia	1.90	2.15	0.45	24%	0.42	19%	0.00	0%	0.02	1%	0.00	0%	0.03	1%
Lithuania	9.24	10.00	7.03	76%	0.08	1%	0.67	7%	2.21	22%	0.00	0%	2.43	24%
Poland	33.94	37.42	20.43	60%	2.00	5%	0.11	0%	2.31	6%	1.31	4%	9.21	25%
Sweden	25.26	25.79	2.66	11%	0,00	0%	2.01	8%	3.68	14%	14.33	57%	12.56	49%
Total:	**213.91**	**214.53**	**76.31**	**36%**	**3.43**	**2%**	**16.20**	**8%**	**29.25**	**14%**	**27.25**	**13%**	**48.17**	**22%**

Own compilation based on Eurostat data

Despite the projected decline in fossil fuel consumption resulting from the implementation of EU energy and climate policies, which will lead to lower import and transport dependencies, the role of the Baltic Sea in ensuring energy security will continue to grow. Rising electricity demand will be met by generation assets located in and around the Baltic Sea basin, particularly renewables and nuclear power, which are sited on the coast and cooled with seawater. Regional cross-border electricity trade will also expand significantly alongside storage and balancing processes that rely on subsea power cables and coastal battery infrastructure. During the transitional phase of this transformation, the importance of imported natural gas delivered via LNG terminals will increase, as will that of crude oil, albeit temporarily. This reflects dynamic economic growth and efforts to reduce reliance on pipeline imports transiting Russia (e.g. Kazakh crude oil delivered to the Schwedt refinery via the Druzhba pipeline).

In the longer term, the hydrogen economy is expected to grow in importance, particularly in the northern Baltic region. This includes the production of low-emission hydrogen in electrolysers and its transportation, including through the planned Nordic–Baltic Hydrogen Corridor, which will link Finland, the Baltic States and Poland with Germany.[26] The second key zero-emission technology of the future is CO_2 capture, transport, storage and utilisation (CCS/CCSU). Although regional countries are planning to develop

26 „Nordycko-Bałtycki Korytarz Wodorowy," GAZ-SYSTEM, www.gaz-system.pl [access: 9.11.2025].

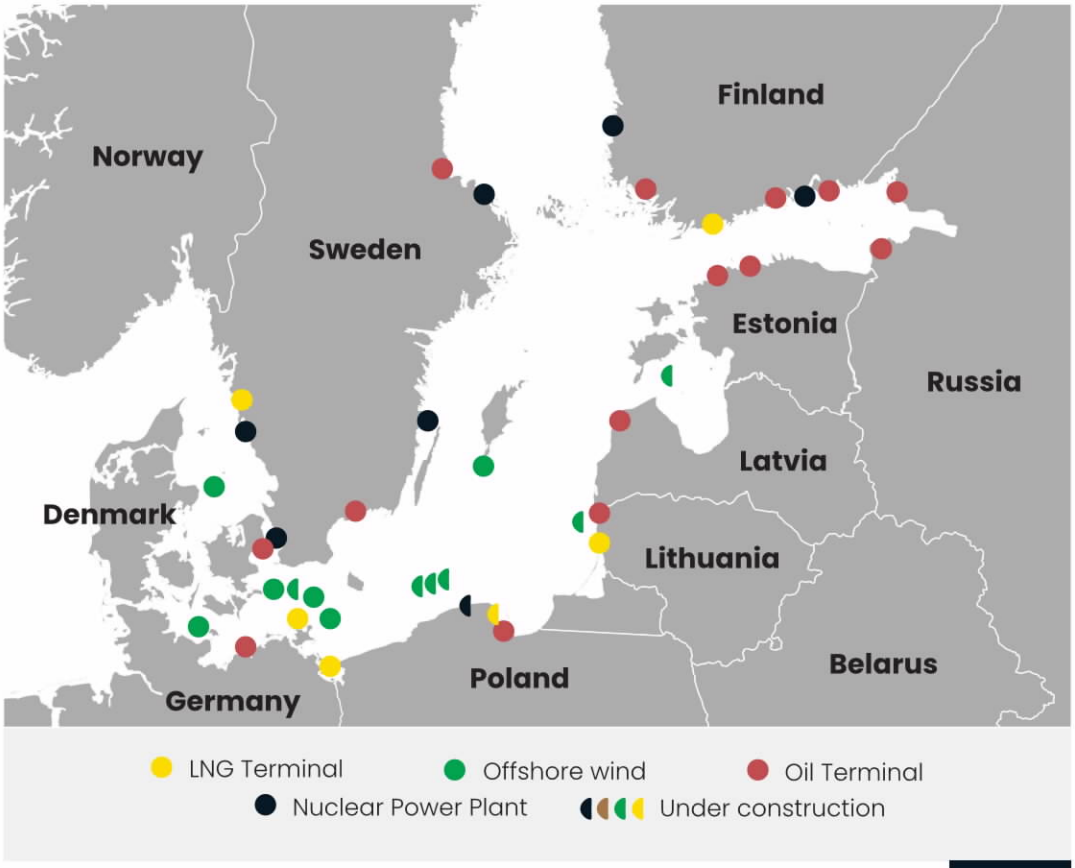
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this, the Baltic Sea will play a limited role in CO_2[2] storage due to legal restrictions, despite its geological potential. Under the Helsinki Convention, CO_2 storage in the Baltic Sea basin is prohibited, and any amendment would require the unanimous consent of all signatory states, including Russia.

Map 3

Key energy infrastructure and investments in the Baltic Sea



Own elaboration

The scale of the most significant investments commissioned after 2022, as well as those currently being implemented or planned for the coming years (see: Map 3) shows the increasing density and diversification of energy infrastructure in the Baltic Sea and the resulting rise in maritime traffic. These investments include renewable energy installations, nuclear energy facilities, power grid modernisation, hydrogen production and transmission infrastructure, and port and fuel terminal expansion. Offshore wind farms are particularly important: the Baltic Sea has one of the highest offshore wind potentials in the EU, estimated at over 90 GW. However, these investments have proven more expensive than initially assumed (costs increased by an average of 10% between 2021 and 2024). Following the initial enthusiasm in 2022, when regional countries com

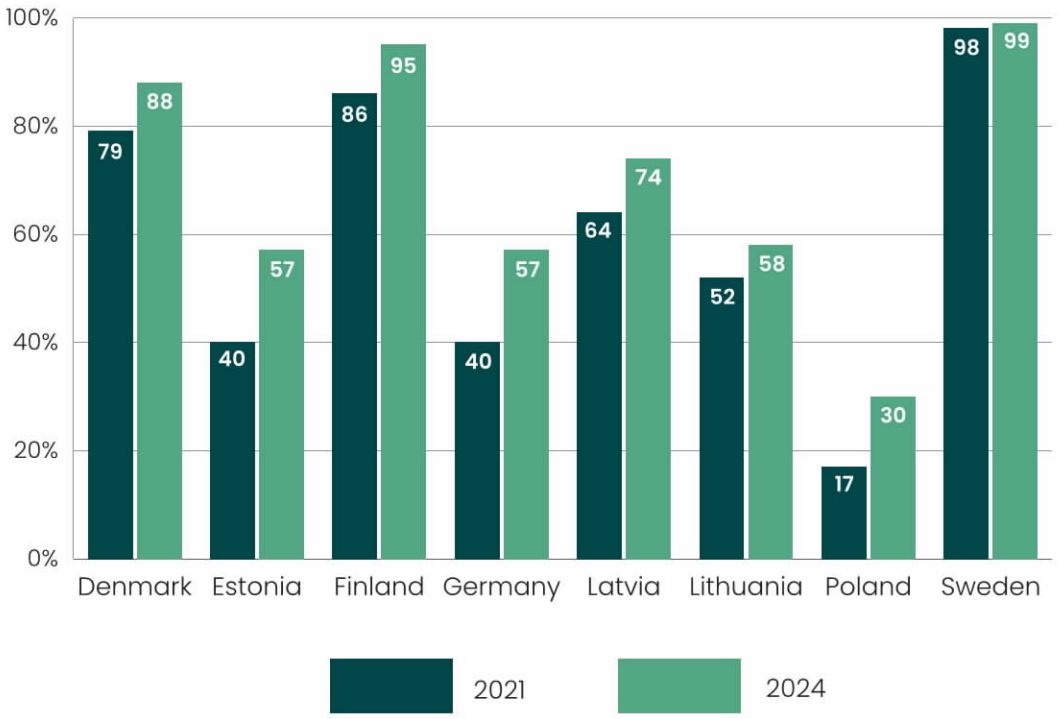
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mitted to 19.6 GW of offshore wind capacity by 2030, some long-term projects have been suspended or cancelled (e.g. in Sweden, formally for defence-related reasons).[27]

Figure 3

Changes in the share of clean generation in the electricity mix in Baltic region countries (2021, 2024)



Own compilation based on Ember data

Cost increases and project delays have been driven by higher spending on physical and cyber security due to growing threats from Russia, an increased cost of capital and difficulties in securing stable supply chains.[28] The development of intersystem subsea electricity interconnectors has been slower, partly due to strong global demand and rising technology costs (e.g. specialist high-voltage direct current cables (HVDC) used for long-distance underwater transmission), which led to the suspension of the Harmony Link subsea interconnector project between Poland and Lithuania. Progress is being made in the deployment of renewables (an average increase in their

27 C. Naschert, "Swedish government denies 13 offshore wind permits over defense concerns," S&P Global, 5 November 2024, www.spglobal.com.

28 C. Rosslowe, B. Petrovich, "Wind sector challenges are blowing over," in: *European Electricity Review 2025*, Ember, 23 January 2025, https://ember-energy.org.

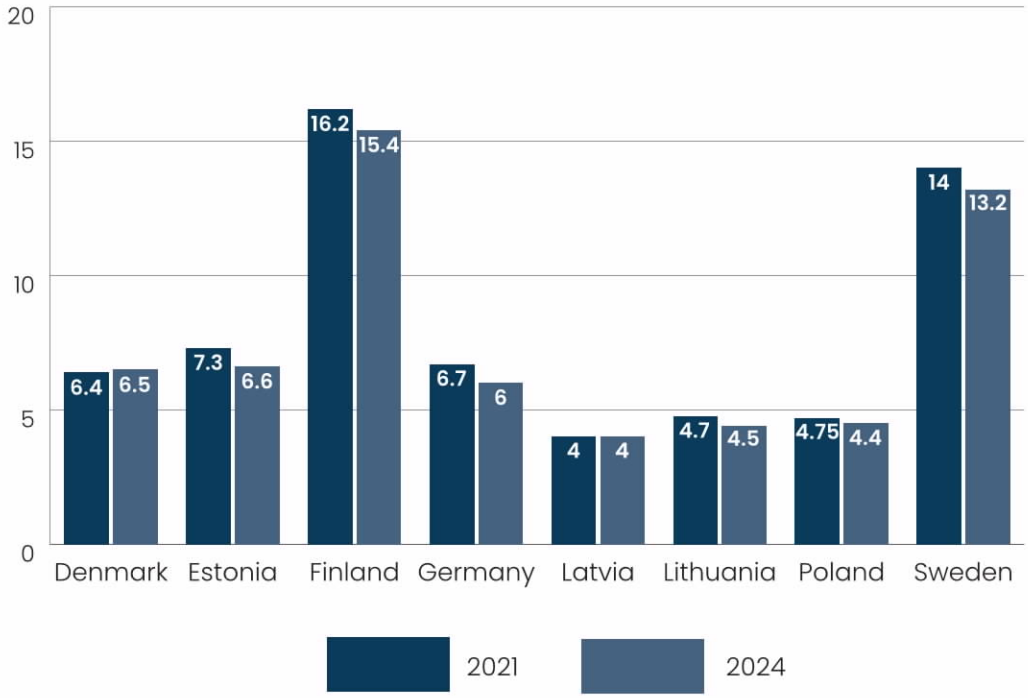
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share of the power mix of around 10% between 2021 and 2024) and in energy efficiency, as evidenced by declining per capita energy consumption (see: Figures 3 and 4).

Figure 4

Electricity demand in MWh per capita in BSR countries (2021, 2024)



Own compilation based on Ember data

Russia is increasingly exploiting the growing role of the Baltic Sea in the region's energy sector and economy, undertaking more frequent and aggressive actions targeting critical energy infrastructure. These include reconnaissance of strategic assets, cyberattacks and disruption to maritime traffic. Since October 2023, Russia has damaged 11 subsea cables and pipelines in the Baltic Sea, and the number of incidents continues to rise.[29] Although Russia has lost the ability to exert direct leverage over the region, such as by cutting off oil and gas supplies, it will continue to create an uncertain maritime environment. This will complicate the new investments, trade flows and energy deliveries. Such threats could hinder the development of the region's countries. At the same time, however, Russia itself remains highly vulnerable, as it depends on oil exports from the Baltic Sea and supply routes to its Kaliningrad exclave.

29 F. Bryjka, "NATO and the EU Respond to Russian Maritime Sabotage," *PISM Bulletin*, No. 108 (2609), 9 October 2025, www.pism.pl.

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Environmental Challenges

Tymon Pastucha

The Baltic Sea is small, shallow and semi-enclosed, with slow water exchange and high vulnerability to pollution. Prior to 2022, the primary environmental challenges were chronic and primarily stemmed from climate change and biodiversity degradation. Key pressures on the ecosystem included pollution and eutrophication resulting from municipal, industrial and agricultural wastewater inflows, as well as resource extraction; legacy loads of hazardous substances, including dumped munitions and chemical warfare agents; increasing maritime traffic; and overfishing.[30] Despite regional efforts to improve the Baltic Sea's environmental status, progress has been limited—particularly compared with the North Sea (e.g. reductions in shipping-related pollution and protection of cod stocks). The effects of climate change, such as rising water temperatures, declining ice cover and more frequent extreme weather events, will require greater investment and stronger engagement from the region's countries if the current environmental baseline is to be preserved.

The sectors most exposed to environmental change risks are, in order of exposure: fisheries, tourism, maritime transport, offshore energy and coastal infrastructure, including logistics, industrial and energy assets. Environmental conditions also strongly impact public health and the resilience of ecosystems.

Since 2022, the overall risk level has increased markedly, yet the region's countries have failed to provide adequate responses. Russia's increased seaborne exports of energy resources using the "shadow fleet," as well as hybrid operations conducted by Russia and China, have raised the probability of high-impact environmental incidents, such as oil spills, subsea infrastructure damage, maritime collisions and illegal discharges into the sea. At the same time, climate change has accelerated; the Baltic Sea is often described as a hotspot of rapid warming, with sea surface temperature increasing at a rate of 0.38°C per decade)[31] and the commercial use of the Baltic Sea has intensified, including the development of renewables and LNG infrastructure, as well as increased shipping activity and commodity flows.

30 "State of the Baltic Sea. Third HELCOM holistic assessment 2016-2021." *Baltic Sea Environment Proceedings*, No. 194, Helcom, https://helcom.fi.

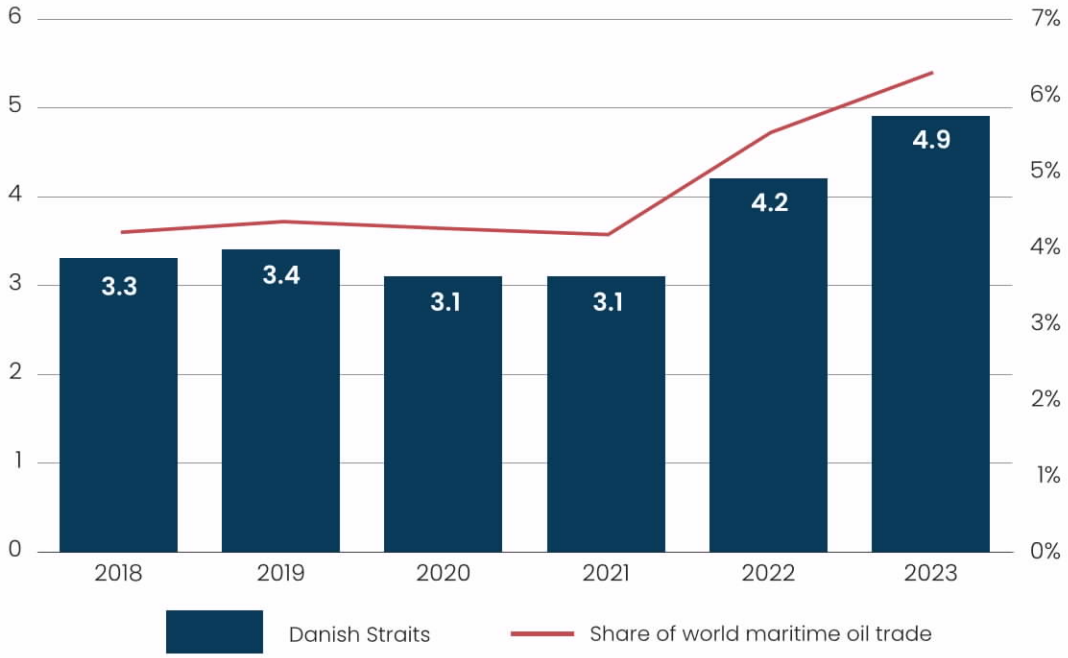
31 K. von Schuckmann, L. Moreira, M. Grégoire, M. Marcos, J. Staneva, P. Brasseur, G. Garric, P. Lionello, J. Karstensen, and G. Neukermans (eds.), "Copernicus Ocean State Report," 2024, Copernicus Publications, State Planet, https://sp.copernicus.org/articles/sp-osr8.pdf.

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Table 5

Volume of crude oil and petroleum liquids transported through Danish Straits 2018–2023 (million barrels per day)



Own compilation based on EIA data

The operation of Russia's "shadow fleet" poses a new and increasingly significant threat to environmental security. This risk is driven by the characteristics of these vessels, as well as by Russia's increased seaborne exports of crude oil and petroleum products. The "shadow fleet" accounts for nearly 70–80% of these exports, with more than 40% of the cargo transiting the Baltic Sea.[32] Therefore, Russia remains the key external driver of environmental security risks through the "shadow fleet" and the broader hybrid pressure for which these vessels are used. Climate change and existing environmental pressures exacerbate the consequences of incidents such as oil spills or discharges of other substances into the sea.

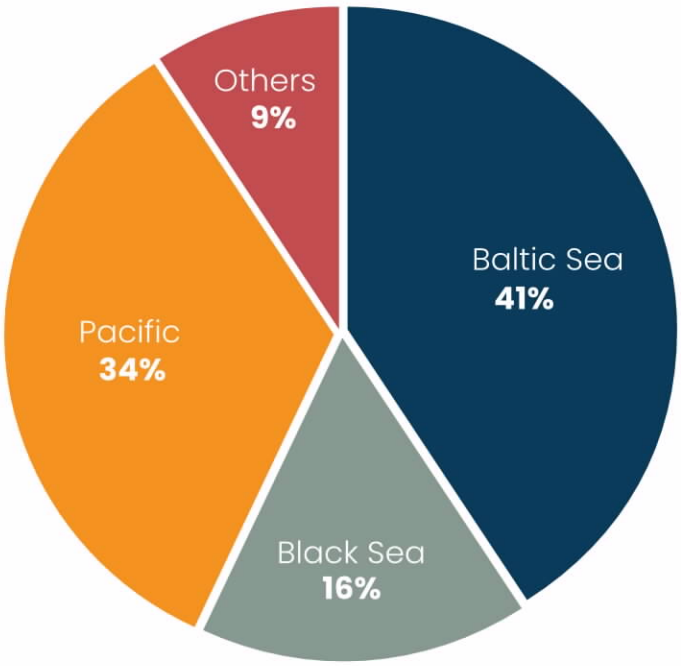
32 P. Katinas, L. Wickenden, "Ensuring an ecological disaster: 'Shadow' tanker spill could cost coastal states USD 1.6 bn," CREA, October 2024, https://energyandcleanair.org.

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Figure 5

Exports of Russian crude oil from regional ports using the "shadow fleet"



Own compilation based on "Russia oil export departing ports region by shadow fleet in 2024 H1," CREA

The Russian "shadow fleet" consists of ageing tankers used by Russia to circumvent Western sanctions (primarily the price cap) when exporting crude oil and petroleum products. These vessels do not rely on services provided by entities in the maritime industry from countries participating in the sanctions coalition. They avoid flag-state and port-state inspections, as well as commercial audits. They also do not have full P&I (protection and indemnity) insurance coverage, or only have minimal coverage. Often obsolete or in poor technical condition, they feature non-transparent ownership structures, frequently change flags, conceal their identity and position through manipulation of the Automatic Identification System (AIS) and name changes, and conduct risky and illegal ship-to-ship transfers.

Vessels in the "shadow fleet" are frequently associated with actions targeting subsea infrastructure (such as cables and pipelines), engage in hazardous navigational practices and are used for reconnaissance, sabotage and other hybrid activities. Their presence in the Baltic Sea increases the risk of collisions, spills and infrastructure damage while complicating the enforcement of financial liability for environmental and economic harm.

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Table 6

Environmental risks associated with the operation of the Russian "shadow fleet" in the Baltic Sea

RISK FACTOR	MECHANISM
Obsolete, poorly maintained tankers	**Engine/hull failures, corrosion, lack of inspections**
AIS deactivation/ manipulation	**"Invisibility" of vessels to other ships and authorities**
STS transfers	**Unsupervised operations; adverse weather/ anchoring conditions**
Lack of P&I insurance/ opaque ownership	**No coverage for civil liability costs**
Circumvention of certification and inspections	**False documentation; non-compliance with technical standards**
Dense subsea infrastructure	**Anchoring; drifting; unreported works**
Untrained crews and non-use of pilotage services	**Navigational/operational errors**
Delayed incident reporting	**Delay in alerting authorities**

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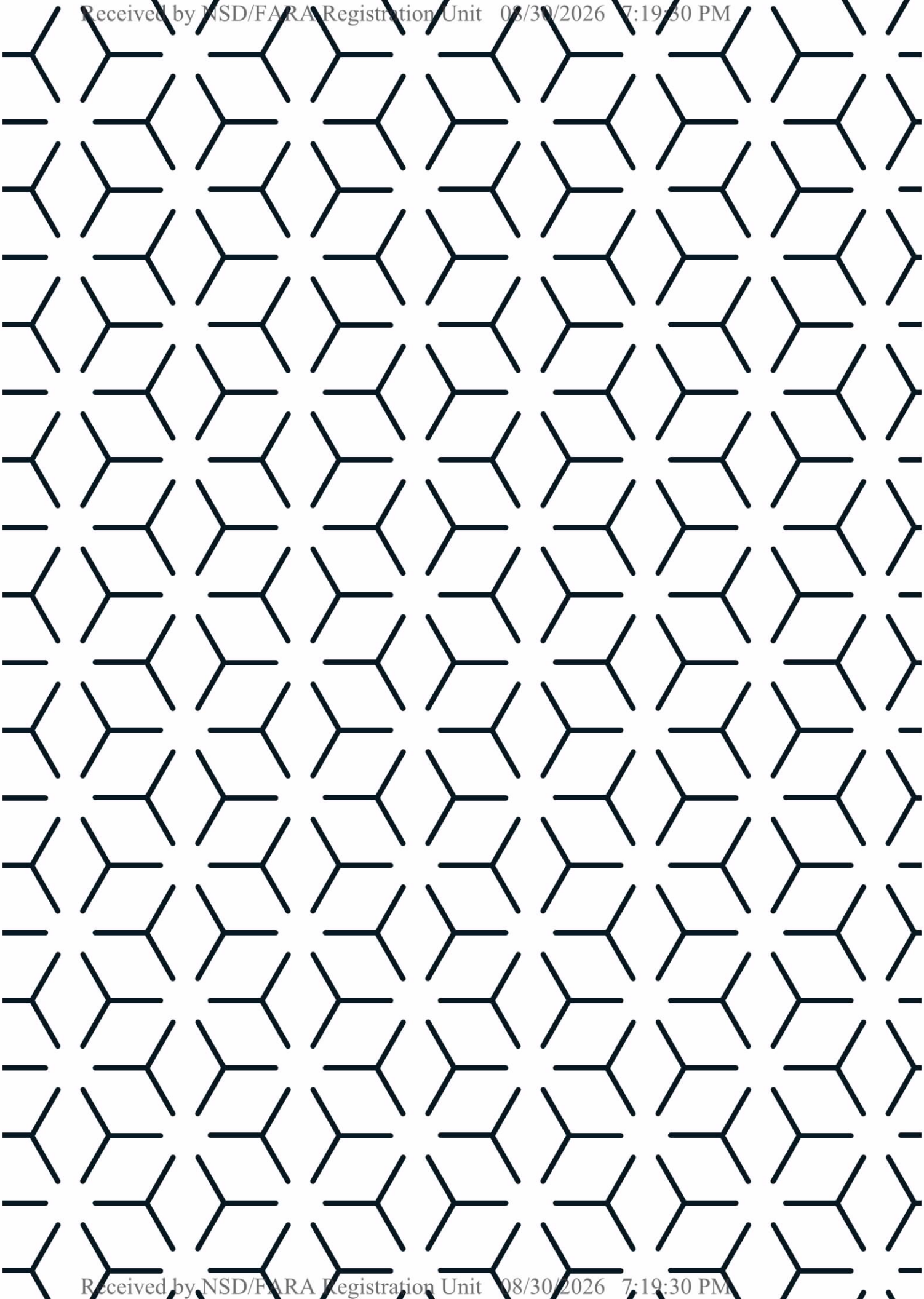
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MAIN ENVIRONMENTAL IMPACTS	WHO BEARS THE COSTS IN THE EVENT OF DAMAGE
Oil spills; contamination of the marine environment and coastline; mass mortality of organisms; long-term pollution; closures of fishing grounds and bathing areas; disputes over jurisdiction and liability; forced re-routing of maritime traffic	Coastal states; local tourism/ fisheries/industry
Collisions in maritime traffic; spill risk; delayed emergency response	Shipowners; states responsible for SAR
Localised/dispersed spills	Operators; ports; public services; coastal states
Delayed, reduced or no compensation payouts; costs of remediation and response shifted to others	State budgets; environmental funds; private affected parties
Elevated risk of accidents and spills	State budgets; environmental funds; private affected parties
Damage to cables/pipelines; secondary contamination; methane emissions	Network operators; coastal states; offshore sector
Groundings; collisions; spills; higher probability of failure	Shipowner; services; coastal states
Larger scale of ecological damage	State budgets; environmental funds; private affected parties

Own elaboration

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Strategy for the Region—Towards a Coordinated Response

NATO

Filip Bryjka

Key to strengthening defence and deterrence against Russia in the BSR is the fulfilment of commitments under the classified operational plans (for the defence of European Alliance countries) adopted at the NATO summit in Vilnius in 2023. These complement NATO's overall strategy and have been prepared for three regional areas of operation: 1) North (European Arctic and Atlantic), 2) Centre (Western Europe north of the Alps and Central Europe) and 3) South (Black Sea and Mediterranean basins), thus allowing military operations to be adapted to geographical conditions. Both the northern and central areas are of strategic importance for the defence of the BSR countries.

The northern area includes the defence of Norway, Sweden, Finland, Denmark and the strategic GIUK area between Greenland, Iceland and the United Kingdom. NATO's priority will be to maintain maritime transport routes in the Arctic and Atlantic, which, in the event of a conflict with Russia, will be of strategic importance for the transfer of troops and weapons from the US and Canada to Europe. The Joint Forces Command (JFC) in Norfolk (USA) is responsible for its implementation, and the Multicorp Land Command North (MCLCC-N), established in September 2025 and based in Mikkeli (Finland), is subordinated to it. Its task is to plan and command Alliance forces on the northern flank in the land domain. In June 2024, NATO decided to establish Forward Land Forces (FLF) in the Rovaniemi and Sodankylä (Finland) area, subordinate to MCLCC-N, and ultimately planned to reach brigade level (4,000–5,000 soldiers). Sweden has assumed the role of the framework nation, and military capabilities will also be provided by Norway and Denmark, with command and staff support from the United Kingdom, Iceland and France. In the event of war with Russia, the FLF will form part of the Finnish division defending the Arctic north of the country. In addition, an Al-

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lied Logistics Command (Joint Logistics Support Group HQ) is being established in Enköping (Sweden), a JFC communications battalion in Denmark, and a Combined Air Operations Centre (CAOC) in Bodø, Norway.[33]

The central defence plan covers the Baltic states and Poland, and its implementation has been assigned to NATO's Allied Command Operations in Brunssum (the Netherlands), which oversees the Multinational Corps Northeast (MNCNE) based in Szczecin (Poland). It comprises allied forces deployed in Poland, Lithuania, Latvia and Estonia. The CAOC in Uedem (Germany), which reports directly to Allied Air Command (AIRCOM), is responsible for the Alliance's air operations in this area. In order to better coordinate operations in the Baltic Sea, in October 2024, NATO established the Baltic Task Force Command (CTF Baltic) in Rostock,[34] which is responsible for the Baltic Sentry mission launched in January 2025 in response to Russian sabotage activities at sea. It aims to deter Russia and protect critical maritime infrastructure by increasing the ability to monitor the situation and shortening any incident response time. Participants include destroyers and frigates from the Standing NATO Maritime Group 1 (SNMG1), as well as mine countermeasure and underwater infrastructure protection vessels from the equivalent allied mine countermeasure group (SNMCMG1). Patrol aircraft, underwater drones and other maritime surveillance assets are also being used.[35]

In response to Russia's invasion of Ukraine, NATO countries have increased their military presence on the north-eastern flank to strengthen their collective defence and deterrence capabilities. However, their deployment (see: Map 4) is temporary and, depending on the situation and threat assessment, has been gradually reduced or supplemented, which weakens the sense of security of the countries in the region. Uncertainty about the Alliance's cohesion on collective defence in the event of Russian aggression was increased by the Trump administration's announcement of a review and reduction of the US military presence in Europe. Therefore, from the perspective of the CEE countries, it is crucial to increase the allied military presence within NATO, rather than on the basis of bilateral agreements.

33 See: P. Szymański, J. Tarociński, "NATO's northern flank: allied forces and structures in the Nordic countries," *OSW Analysis*, 7 October 2025, www.osw.waw.pl.

34 This staff structure is rotational in nature. In 2028, it will be transferred to Poland (Gdynia), and four years later to Sweden.

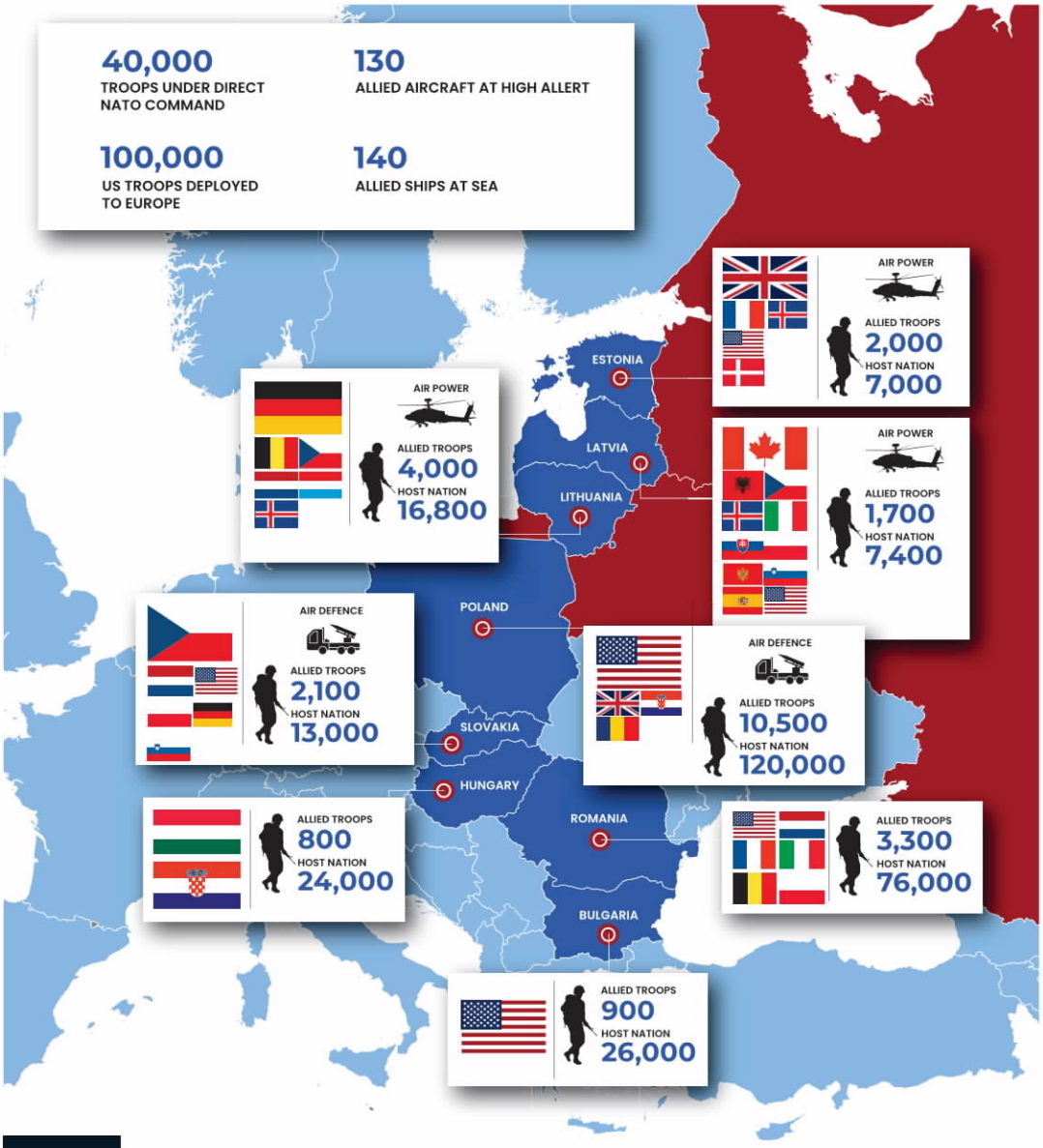
35 See: F. Bryjka, "NATO and the EU Respond to Russian Maritime Sabotage," op. cit.

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Map 4

NATO forces deployment on the eastern flank (as of March 2022)



Own elaboration based on NATO data

At the Madrid summit in 2022, a decision was made to strengthen multinational combat groups in Poland and the Baltic states from battalion level (approx. 1,000 soldiers each) to brigade level (approx. 4,000-5,000), which, as part of the enhanced Forward Presence (eFP), are intended to deter Russia and provide immediate support for the defence of the region's countries in the event of aggression. Their multinational character is intended to guarantee solidarity in collective defence and give allies time to mobilise greater forces and resources. By 2025, only two framework nations had in-

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creased the level of their battlegroups: Canada, which heads the battlegroup in Latvia (up to 3,500 troops, with operational readiness to be achieved by the end of 2026), and Germany, which in April 2025 established the 45th Armoured Brigade stationed in Lithuania (up to 5,000 soldiers, operational readiness to be achieved in 2027). The United Kingdom, commanding the group in Estonia, was unable to increase its contingent due to insufficient personnel, while the United States considered the temporary deployment of elements of an armoured and airborne brigade (approx. 5,000 soldiers) in Poland to be sufficient. Since 2022, several permanent US military facilities have also been established (including Camp Kościuszko in Poznan, US Army Garrison Poland, the Aegis Ashore US Navy missile defence base in Redzikowo, and US Army equipment storage and repair depots).

An important element of NATO's response to Russia's invasion of Ukraine was also the strengthening of airspace protection on the eastern flank, where Alliance countries (including Spain and Italy) deployed additional fighter jets (F-35, Eurofighter Typhoon and Gripen), reconnaissance aircraft (AWACS) and anti-aircraft systems (Patriot). The Baltic Air Policing mission, which has been ongoing since 2004 and involves protecting the airspace of the Baltic states, which do not have their own air forces, has also been strengthened. Round-the-clock combat duty is carried out on a rotational basis from air bases in Lithuania (Šiauliai), Estonia (Ämari) and Poland (Królewo Malborskie). In addition to additional fighter rotations, NATO has integrated the activities undertaken as part of this mission into a broader air defence operation (IAMD). In response to violations of the airspace of Poland and the Baltic states by Russian drones and aircraft, NATO decided to launch the Eastern Sentry mission in September 2025, involving the deployment of additional aircraft (three French Rafale fighter jets, two Eurofighter Typhoons belonging to Germany, another two from the United Kingdom, and two Danish F-16s), helicopters (three Czech Mi-17s), air defence systems (two Dutch Patriot batteries) and a Dutch frigate to protect the airspace of the eastern flank.

Announcements by Donald Trump's administration—formulated, among others, in the Global Posture Review—clearly indicate a planned reduction of the US military presence in Europe by approximately 9,000 (from 85,000 to 76,000).[36] In April 2025, the US military handed over responsibility for protecting the Rzeszów-Jasionka airport, which is the main logistics hub for Western military aid for Ukraine, to NATO. Subsequently, the size of the US contingent in Romania was reduced from 1,700 to approximately 900-1,000 soldiers. In early 2026, the Department of War announced a gradual withdrawal from 30 NATO Centres of Excellence, which provide expert advice, as well as a reduction in US involvement in Alliance structures responsible for special operations

36 P. McLeary, V. Jack, J. Detsch, "US signals limited military pullback from Europe," *Politico*, 11 February 2026, www.politico.com.

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and intelligence.[37] In February, some NATO commands, which had previously been led by Americans, were Europeanised. The United Kingdom took over Joint Force Command Norfolk (JFC Norfolk), Italy took over Joint Force Command Naples (JFC Naples), and Germany and Poland will share (on a rotational basis) command of Joint Force Command Brunssum (JFC Brunssum). However, the United States will continue to lead all three theatre-level commands, taking on new responsibility for the Allied Maritime Command and maintaining leadership of the Allied Land Command and the Allied Air Command.[38] These decisions are intended to encourage European NATO members to become more involved and take responsibility for conventional defence, as clearly stated in the latest US National Defense Strategy (NDS).[39] However, this could be interpreted by Russia as a gradual weakening of US security guarantees and its willingness to fulfil its obligations under Article 5 of the Washington Treaty. Perceiving NATO as politically divided could prompt Russia to test the Alliance's solidarity by escalating hybrid activities or direct military confrontation.

In January 2026, NATO launched the Arctic Sentry operation, which aims to strengthen the Alliance's defence and deterrence capabilities in the High North. The decision to establish the mission is one of the elements of mitigating the dispute between the US and Denmark over Greenland, which could have led to the most serious crisis in the history of the Alliance, and even to its collapse. One of the arguments raised by Donald Trump's administration was Denmark's insufficient commitment to defending the island, which is of strategic importance due to its rare earth mineral resources and its location in relation to maritime transport routes in the Atlantic. The launch of the Arctic Sentry mission (modelled on the Baltic Sentry and Eastern Sentry missions on the eastern flank) is not just intended to demonstrate the readiness of European countries to take on greater responsibility for the defence of NATO's northern borders, but above all to effectively ward off American claims to Greenland and deter the expansionist policies of Russia and China in the Arctic.[40]

The main challenge for BSR countries is to quickly achieve the defence capabilities necessary to implement regional plans. All countries have increased their defence spending in recent years, exceeding the required 2% (the target set at the 2014 Nepor-

37 N. Robertson, "Pentagon moves to cut U.S. participation in some NATO advisory groups," *Washington Post*, 20 January 2026, www.washingtonpost.com.

38 *European Allies to take on new leadership roles in NATO's Command Structure*, NATO, 10 February 2026, www.nato.int.

39 *National Defense Strategy*, Department of War, 23 January 2026, www.media.defense.gov.

40 F. Bryjka, "NATO launches the Arctic Sentry mission," *PISM Spotlight*, No. 9/2026, 13 February 2026, www.pism.pl.

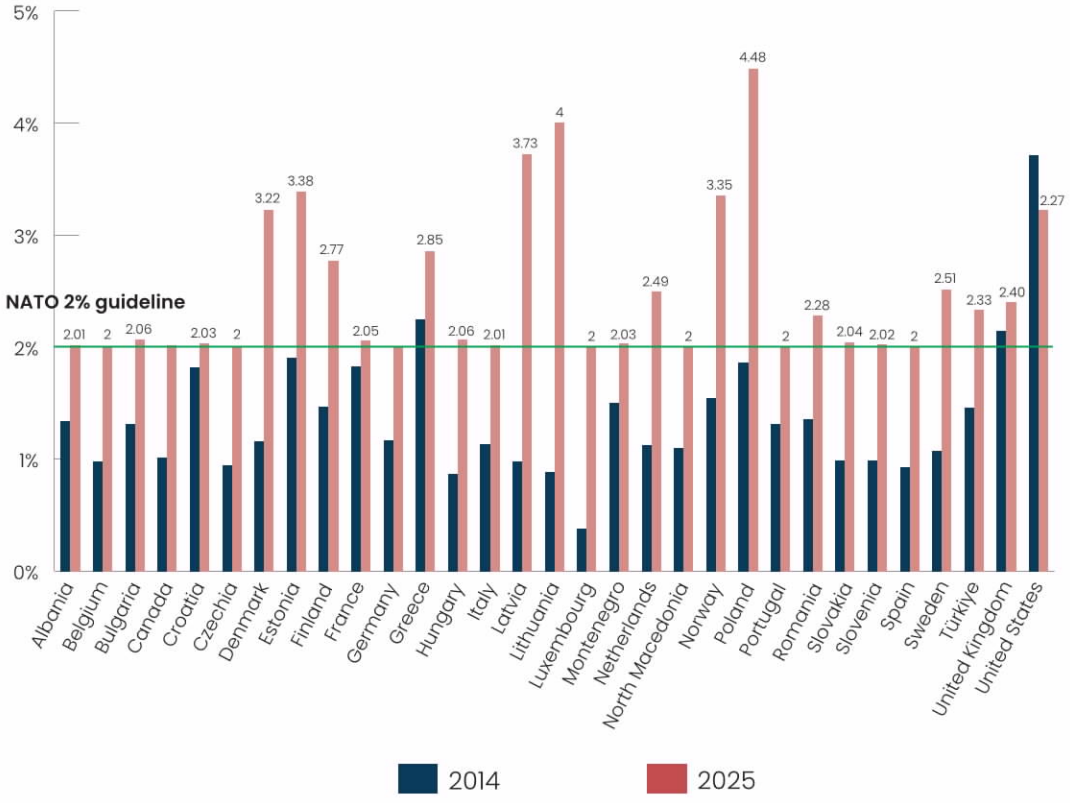
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summit) and aiming to reach 5% (the new target set at the 2025 Hague summit).[41] The leaders in spending are Poland (4.48% of GDP) and Lithuania (4%). Latvia (3.73%), Estonia (3.38%) and Denmark (3.22%) remain among the NATO countries that allocate the largest share of their budgets to defence (see: Figure 6), but the expenditure of the new Alliance members—Finland (2.77%) and Sweden (2.51%)—is insufficient.[42] However, their military potential and geographical location have given NATO significant strategic advantages in the region. Finland and Sweden's maritime capabilities in submarine warfare and mining increase their ability to maintain communication routes in the Baltic Sea and possibly close the Gulf of Finland to the Russian Baltic Fleet. The protection of Gotland, strategically located in the Baltic Sea and a bastion of Swedish A2/AD capabilities, will be of key importance in this regard.

Figure 6

Defence expenditure of NATO countries in 2014 and 2025



Own elaboration based on Defence Expenditure of NATO Countries (2014-2025)

41 As part of this 5% of GDP, member states have committed to spending 3.5% on core defence (including military personnel, operations, procurement and modernisation of military equipment) and 1.5% on infrastructure and industrial development (e.g. construction and modernisation of military bases, defence industry, research and development).

42 Data based on "Defence Expenditure of NATO Countries (2014-2025)," NATO, www.nato.int.

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The Swedish Air Force not only strengthens the protection of the northern airspace flank, but can also support NATO nuclear forces operations, as evidenced by the participation of Jas 39 Gripen fighters in NATO's Steadfast Noon 2025 exercises as conventional cover for American B1 and B-52 strategic bombers.[43] The potential of Finnish artillery, land forces and air forces, in turn, provides opportunities to counterattack aggressor forces advancing along the Finnish-Russian border, which is over 1,340 km long.[44] As a result, the accession of Finland and Sweden to NATO has expanded the strategic and operational depth of the Alliance, which may be crucial for the defence of the Baltic states in the event of the Suwałki Gap being seized by Russian and Belarusian troops, thus cutting off land-based support from Polish territory.

To increase their deterrence and defence capabilities, the Baltic states and Poland have decided to withdraw from the Ottawa Treaty banning the use of anti-personnel mines and to strengthen their borders with Russia and Belarus as part of the "Eastern Shield" and "Baltic Defence Line" programmes. The construction of a comprehensive system of fortifications, barriers, bunkers and shelters, as well as the possibility of mining the area in the event of enemy forces gathering near the border, will increase the costs of potential aggression and should influence Russia's calculations. This is particularly important for the Baltic states, which, due to their small territory, lack strategic depth and sufficient resources for self-defence. To balance the asymmetry of their capabilities against Russia, the BSR states are developing a model of "total defence" that involves entire societies in building resilience in the event of a crisis and self-defence in the event of war, including through investments in civil defence. Their armed forces have a small number of professional soldiers in relation to reservists, which reduces the costs of maintaining the army in peacetime. Finland and Estonia have universal conscription. Although basic military service will be voluntary in Denmark and Norway after 2022, these countries are focusing on rebuilding their trained reserves. The Danish-Norwegian model has been copied by Lithuania, Latvia and Sweden, which are thus signalling their societal readiness for universal defence in the event of war. However, an insufficient number of instructors and infrastructure for training military personnel remains a problem for some countries.

Over the next 3-5 years, the priority for the BSR countries will be to strengthen their defence capabilities in order to fulfil their obligations under NATO's regional plans. However, the challenge will be to rapidly increase defence spending to 5% and maintain it at that level in the long term, which may lead to an excessive burden on national budgets. Limited financial resources and the time needed to acquire technologically

43 W. Lorenz, "Sweden Becomes a Member of NATO," *PISM Spotlight*, No. 12/2024, 11 March 2024, www.pism.pl.

44 See: R. Miętkiewicz, "Strategiczna przewaga NATO na Bałtyku: znaczenie akcesji Finlandii i Szwecji dla bezpieczeństwa regionu," Opportunity Institute for Foreign Affairs, March 2025, www.theopportunity.pl.

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advanced weapons and military equipment will force the prioritisation of individual sectors. Due to Russian provocations involving drones, deliberate airspace violations and GPS jamming, it will be particularly important to develop regional capabilities in air defence, anti-drone systems and electronic warfare. In addition to defensive capabilities, it will also be necessary to build up artillery ammunition reserves and strengthen capabilities to strike the enemy on its territory (medium- and long-range missile systems). An important element in strengthening regional maritime operational capabilities—complementing the potential of Finland and Sweden—will be the efficient implementation of the Polish naval modernisation programmes "Orka" (submarines) and "Miecznik" (frigates).

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EU

Aleksandra Kozioł

For over 20 years, the EU has shown interest in maritime areas, recognising their importance for the economy, transport, energy, and environmental protection. In 2009, the BSR became the first area for which a dedicated macro-regional strategy[45] was developed, covering eight EU states around the Baltic Sea and neighbouring non-EU countries (see: Map 5). The main objective of the strategy was to support measures protecting the marine environment, developing regional transport and energy connections, and promoting economic growth and competitiveness. Its creation was particularly justified in view of the 2004 EU enlargement to include four BSR countries, which created an opportunity for its development within the single market.

Map 5

States of the Strategy for the Baltic Sea Region



Own elaboration based on European Union Strategy for the Baltic Sea Region

Maritime security issues, which are exclusively a national competence, have remained on the back burner for years. However, the EU has gradually developed instruments to support Member States' efforts to develop operational cooperation and information

45 In 2012, the strategy was reviewed; "European Union Strategy for the Baltic Sea Region," EUSBR, 10 June 2009, https://eusbsr.eu/; "European Union Strategy for the Baltic Sea Region," EUSBR, 23 March 2012, https://eubsr.eu/.

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exchange. The first of these was the Common Information Sharing Environment (CISE),[46] which enables the exchange of information between the civil and military services of Member States and EU institutions.[47] This allows for the monitoring of events at sea, such as illegal activities, environmental pollution, and migration. The second was the Maritime Surveillance (MARSUR)[48] project, which enables the exchange of information between the navies of Member States, with the support of the European Defence Agency (EDA).[49] It supports situational awareness and response to maritime threats from a military perspective.

In the years following, the EU began to view the sea as an area of strategic importance that required a coherent approach. In 2014, it presented its Maritime Security Strategy,[50] which took a cross-cutting approach to maritime governance, the protection of strategic interests and economic development, as well as security and defence measures. Although it refers, among others, to the Baltic Sea and the North Sea, as well as the Arctic waters, it identifies the greatest challenges in the southern direction, covering the Mediterranean Sea, the Indian Ocean and the Red Sea. This trend is also confirmed by the decisions of Member States, which have resolved to launch EU operations in these areas (see: Map 6) in order to jointly counter maritime threats more effectively.

In 2021, the EU's catalogue of capabilities was supplemented by the concept of a coordinated maritime presence, which is intended to ensure better cooperation between Member States' naval forces in joint operations in key areas. It is conducted under national command, with participating states voluntarily delegating their resources.[51] In this case, the Maritime Area of Interest Coordination Cell (MAICC) at the European Union Military Staff (EUMS) facilitates the exchange of information. The EU currently uses this model in the Gulf of Guinea and the western Indian Ocean (see: Map 6), so once again, its activities are limited to the southern hemisphere.

46 Proposed back in 2009, work on its development continued until July 2024, when it became fully operational.

47 The following organisations are involved in the project: the European Commission, the European External Action Service (EEAS), the European Defence Agency (EDA), the European Fisheries Control Agency (EFSA), the European Maritime Safety Agency (EMSA), the European Border and Coast Guard Agency (Frontex), the EU Satellite Centre (EU SatCen).

48 The project was initiated in 2006. It has been operational since 2011.

49 Twenty Member States participate in it: Belgium, Bulgaria, Croatia, Cyprus, Finland, France, Germany, Greece, Italy, Ireland, Lithuania, Latvia, Malta, the Netherlands, Poland, Portugal, Romania, Slovenia, Spain, Sweden, Norway and the United Kingdom; EDA and EU SATCEN.

50 "European Union Maritime Security Strategy," European Council, Council of the European Union, 24 June 2014, https://data.consilium.europa.eu/.

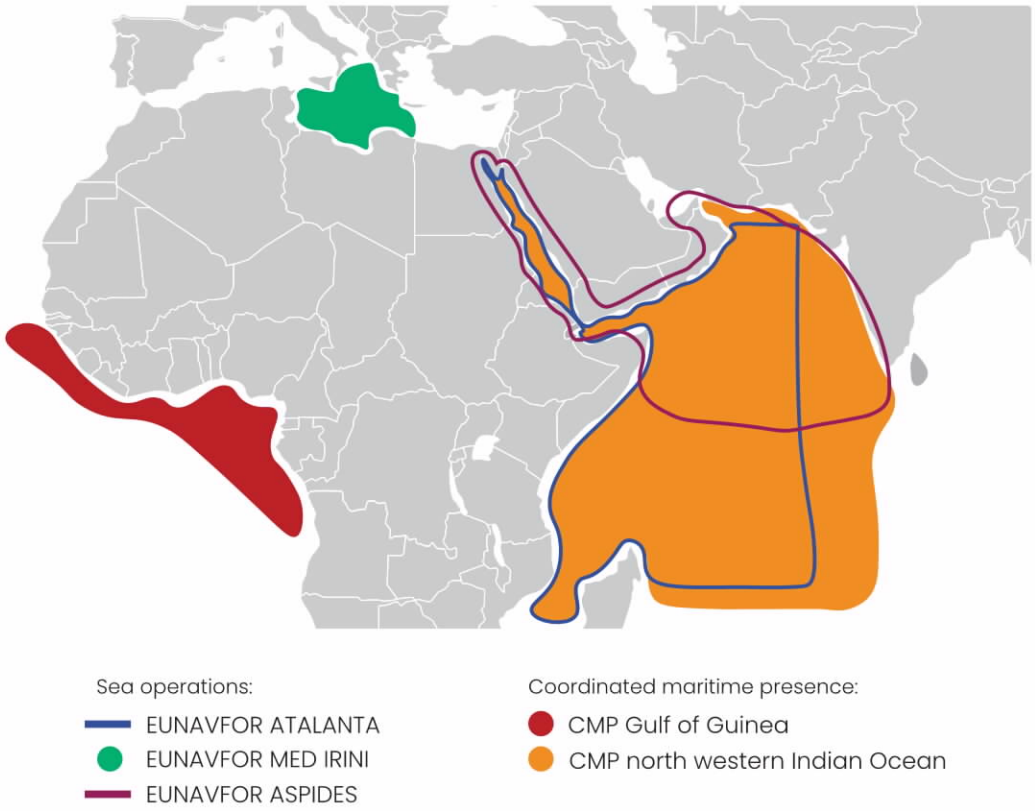
51 Decisions on action within the framework of a coordinated maritime presence are taken by the Council of the EU.

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Map 6

Active operations and coordinated maritime presence



Own elaboration based on European External Action Service

The importance of the Baltic Sea for the EU in terms of security increased significantly after 2022, mainly as a result of European countries limiting economic relations with Russia following its aggression against Ukraine and the resulting need to diversify freight and energy transport routes. At the same time, the strategic location of the Baltic Sea as a body of water shared with Russia has made it vulnerable to an increasing number of environmental, hybrid and military threats. Within the EU, issues such as the protection of critical infrastructure, pollution prevention and maritime safety have become the subject of debate, taking into account the need to build resilience to hybrid operations by Russia. At the same time, even before the war started by Russia in 2022, the EU had been paying attention to Russia's military build-up in Arctic waters and airspace. It took into account aspects such as critical infrastructure protection,

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cyber threats and disinformation, as well as China's growing interest in the Northern Sea Route.[52]

Although the EU has instruments for engaging in the Baltic Sea and North Sea regions, as well as the Arctic, it has not made sufficient use of them to date. The main obstacle has been a lack of commitment on the part of Member States, which have underestimated Russia's destabilising potential. Moreover, the development of maritime capabilities has been systematically neglected at the EU level for years, even though the EDA identified them as one of its military priorities. Inconsistency in this area is also evident today, e.g. maritime capabilities are not included in the European Council's conclusions of March 2025, though they do appear in the Defence Readiness Roadmap 2030 of October of the same year.[53] Meanwhile, Russia's intensifying hybrid operations and military buildup are forcing states to accelerate their adaptation to new threats and fill gaps in their capabilities to protect and defend the BSR.

There are doubts about the way in which the EU is shaping its policy towards the BSR after 2022, especially in the context of a lack of clearly defined priorities and insufficient reflection of the urgency of the challenges facing this area in the changing security architecture. Due to the suspension of cooperation with Russia and Belarus[54] under the Strategy for the Baltic Sea Region, its objectives of intensifying cooperation with these states, which would include maritime surveillance, disaster prevention and response, have not been updated. The Strategy is accompanied by regularly adopted action plans that define priority areas for transnational cooperation in the BSR. The current version of the plan from 2021 also provides for cooperation with Russia and Belarus,[55] and the process of adopting the update (initiated in 2023) is taking too long and is not expected to be finalised until 2026. The only significant change since 2022 has been inviting Ukraine to cooperate as an associated partner.[56]

52 The first Arctic policy framework was adopted in 2016 and subsequently updated in 2021. "A stronger EU engagement for a peaceful, sustainable and prosperous Arctic," European Union External Action Service, 13 October 2021, www.eeas.europa.eu.

53 See: A. Kozioł, "The New EU Defence Agenda. Moving Towards a Single Market for the Arms Sector," *PISM Report*, November 2025, www.pism.pl.

54 The National Coordinators Group has decided to suspend cooperation with Russia and Belarus, following the European Commission's decisions on the European Neighbourhood Instrument and the Interreg Baltic Sea Region programme, "Background and objectives of the European Union Strategy for the Baltic Sea Region," Government Offices of Sweden, 4 February 2025, https://government.se/.

55 "EU Strategy for the Baltic Sea Region, Action Plan," [COM(2009) 248 final], European Commission, 15 February 2021, https://eusbsr.eu/wp-content/uploads/action-plan-2021.pdf.

56 "Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on the Implementation of EU Macro-Regional Strategies," [SWD(2025) 116 final], European Commission, 13 May 2025, https://eusbsr.eu/wp-content/uploads/com2025196_0.pdf.

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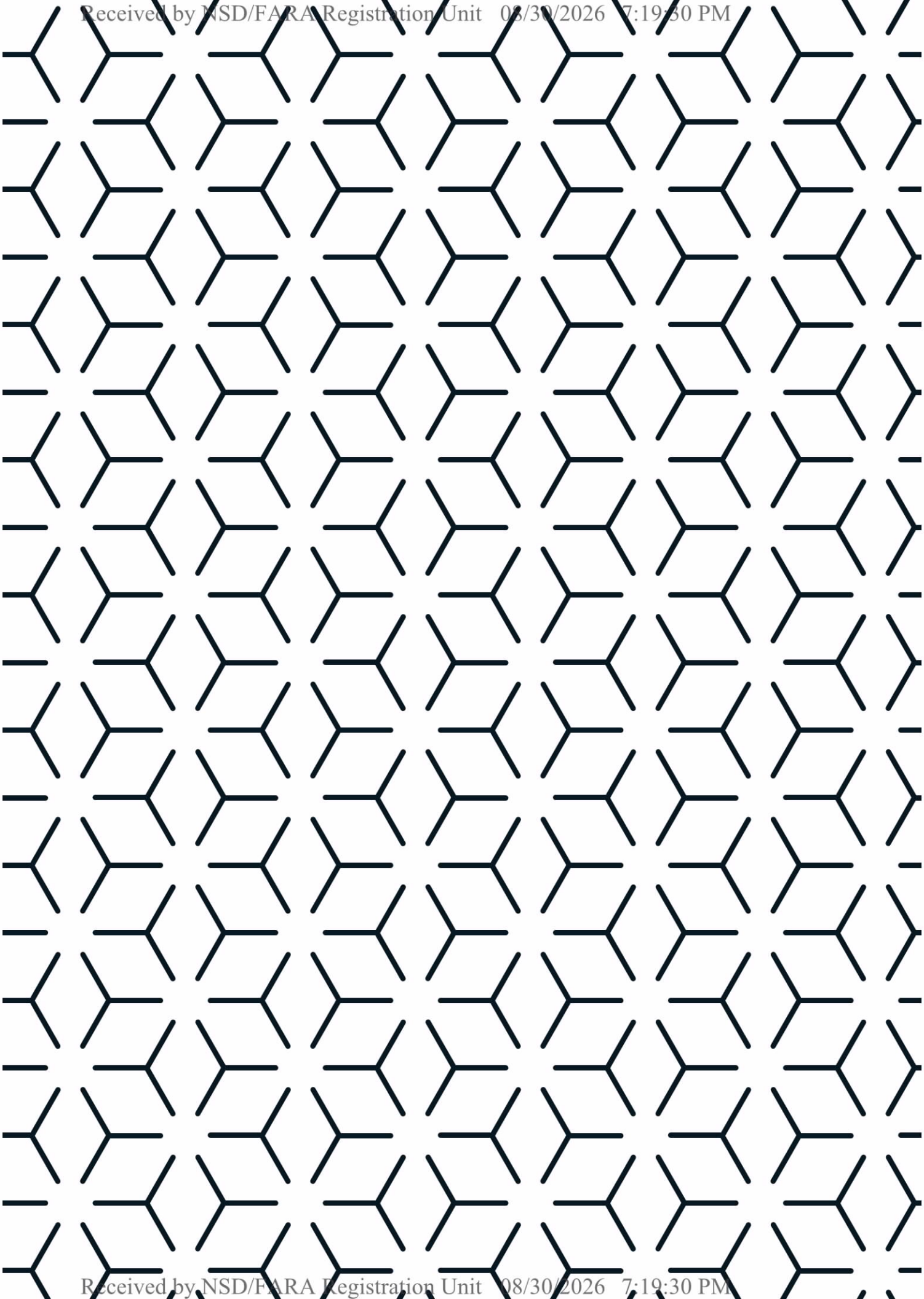
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The October 2023 update of the Maritime Security Strategy, which for the first time so clearly refers to the need to strengthen European maritime response capabilities, can be seen as an attempt to respond to the growing threats in the BSR. The EU has clearly defined its objectives for annual maritime exercises, strengthening existing maritime operations, and extending its coordinated maritime presence to new areas while developing coastguard capabilities. These activities are intended to support the extensive CISE and MARSUR information exchange systems, as well as space-based surveillance capabilities in the Baltic and Arctic waters. Furthermore, it is the only EU strategic document that refers to the BSR, giving it significance in the context of European security. The strategy points to the deteriorating security situation in the Baltic Sea and clearly identifies Russia as the source of growing threats at sea.

The cooperation potential within the EU in the BSR remains significant, but its realisation will require prioritising this area. Existing structures and mechanisms—such as CISE, MARSUR, maritime operations and coordinated maritime presence—provide a good starting point for the Union, but require expansion, better agreement on joint action between states, and increased funding at both the EU and national levels. The direction of further work should be based on the experience which has already been gained, not only by the BSR countries, but also by southern Europe, which has developed effective solutions to combat maritime crime and respond to crises, e.g. in the Mediterranean Sea and the Indian Ocean. Of particular importance will be the ability to monitor the situation in the Baltic Sea and the Arctic, protect critical maritime infrastructure, and develop joint procedures for responding to hybrid threats from Russia. This would increase the effectiveness of the response at the EU level and also translate into a strengthening of defence and deterrence capabilities within NATO. However, the full potential of cooperation can only be realised with the active involvement of Member States in developing operational readiness and interoperability within existing EU structures and mechanisms, such as the EU Military Planning and Conduct Capability (MPCC), which could assume greater responsibility in the event of a lack of consensus on conducting operations within NATO.

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Regional Formats

Kinga Dudzińska, Amanda Dziubińska

The specificity of regional co-operation in the BSR

The Baltic is a small, semi-enclosed basin, which increases interdependence among coastal states in shipping, environmental protection, energy and critical infrastructure. The effects of incidents, pollution or disruptions to navigation quickly become transboundary in nature. At the same time, politically and institutionally, the region is highly diverse. It includes EU member states (Denmark, Sweden, Finland, the Baltic states, Poland and Germany), as well as states outside EU structures (such as Norway and Iceland, though both belong to the EEA). It also includes NATO members (including, recently, Finland and Sweden) as well as a state outside the Alliance (Russia).

Since 2022, the dynamics and direction of co-operation in the region have been shaped by Russia's aggressive posture. Following its full-scale aggression against Ukraine, Russia was either excluded from most organisations or suspended its own membership. Its actions led to a fundamental reorientation of the region's prevailing model of co-operation—from a previously dominant sectoral approach towards priorities centred on deterrence, situational awareness and the protection of critical infrastructure. This shift has been reinforced by repeated cable-damage incidents and growing NATO and EU activity focused on the security of undersea infrastructure.

The co-operation model developed in the BSR is also a result of the long-standing Nordic tradition, which Lithuania, Latvia and Estonia have emulated. Whereas before 2022 the vast majority of Baltic formats deliberately excluded hard security from their remit, in recent years–and especially since 2024–hard security has set the main direction of activity and defined the objectives of Nordic–Baltic initiatives. This pronounced shift towards security, including military security, is a direct consequence of new threats.[57] In response to Russia's increased activity in the BSR, including actions below the threshold of war (sabotage and disruptions targeting critical infrastructure, cyber operations and disinformation campaigns), regional co-operation has intensified and moved from declaratory commitments to implementation. It now encompasses the coordination of security policies, joint response procedures, information exchange, and strengthening infrastructure-protection capabilities, as well as–increasingly–in-

57 R. Miętkiewicz, "Hybrid threats in the Baltic Sea. The results of analysis of countermeasure options," in: *Terrorism—Studies, Analyses, Prevention*, 2025, Special Edition, pp. 35–70; See also: P. Mickiewicz, "Bezpieczeństwo energetyczne czy bezpieczeństwo morskie? Dylemat oceny potencjalnych zagrożeń bezpieczeństwa Polski na akwenie Morza Bałtyckiego w trzeciej dekadzie XXI wieku," *Nautologia*, No. 161, 2024, pp. 71-76.

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tegration with defence planning and deterrence activities conducted within NATO and the EU.

Table 7

Formats of regional co-operation in the BSR

NAME (ABBREV.)	YEAR ESTABLISHED	MEMBERS	MAIN AREA OF CO-OPERATION	POLAND'S PARTICIPATION
Council of the Baltic Sea States (CBSS)	**1992**	DK, EE, FI, DE, IS, LT, LV, NO, PL, SE, EU (Russia until 2022)	regional policy; sustainable development; circular economy; environmental protection; biodiversity; societal resilience; youth	full member
EU Strategy for the Baltic Sea Region (EUSBSR)	**2009**	8 EU Baltic littoral states: PL, DE, DK, SE, FI, LT, LV, EE	sustainable development; economy; transport; environment	active participant
Helsinki Commission (HELCOM)	**1974**	all Baltic Sea states + EU	protection of the marine environment; green transport; biodiversity	member
Nordic–Baltic Eight (NB8)	**c. 1990**	DK, FI, IS, NO, SE, EE, LV, LT	political co-operation; consultative forum; security (incl. CI protection); economy and development	observer/ partner
Baltic Assembly; Baltic Council of Ministers (Baltic Council)	**1990**	EE, LV, LT	intergovernmental and interparliamentary co-operation among the Baltic states	does not participate
Nordic Defence Co-operation (NORDEFCO)	**2009**	Baltic littoral states + European Commission	energy market integration; grid synchronisation; protection of energy infrastructure	active participant
Union of the Baltic Cities (UBC)	**1991**	70+ cities from the region	local-government co-operation; urban and local authority development	Polish cities are members
Baltic Sea Parliamentary Conference (BSPC)	**1991**	parliaments of regional states	parliamentary co-operation	participant
BONUS / BANOS	**2007 / 2020**	Baltic Sea states + EU	scientific research on the Baltic ecosystem	participant
Baltic Ports Organization (BPO)	**1991**	seaports of the Baltic region	maritime transport; logistics; environment	ports of Gdynia, Gdańsk, Szczecin

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A new agenda for the Council of the Baltic Sea States (CBSS)

In early March 2022, the CBSS suspended Russia's membership rights; two months later, Russia formally withdrew from the organisation. This ended the period of inclusive co-operation in the region and redefined its character. At the same time, the CBSS remains the most important political platform which, through an ongoing reform process, is adapting its agenda to the post-2022 security environment. Beyond socio-economic, environmental and integration/education issues, it increasingly covers maritime security topics: critical infrastructure protection, seabed monitoring, and resilience-building (including societal resilience).[58] In July 2025, Poland assumed the CBSS Presidency, and among its priorities, it identified critical infrastructure protection and countering hybrid threats (including those linked to the "shadow fleet").[59]

Map 7

Trends in CBSS co-operation



Own elaboration based on NATO data

58 T. Lawrence, "The Baltic Sea in Peace and War," ICDS, 24 October 2025, www.icds.ee.

59 „Rada Państw Morza Bałtyckiego o bezpieczeństwie," Ministerstwo Spraw Zagranicznych, 16 January 2026, www.gov.pl/web/dyplomacja.

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Table 8

Maritime security activities (2022–2025)

YEAR	EVENT / INITIATIVE	SCOPE OF CO-OPERATION	PARTICIPANTS / INSTITUTIONS
2022	CBSS response to Russia's aggression against Ukraine—suspension of co-operation with Russia; preservation of structures among the remaining states	Regional security; institutional stability; common maritime policy	Poland, Sweden, Finland, Germany, Denmark, Lithuania, Latvia, Estonia, Norway, Iceland, EU
2022	HELCOM—continuation of the programme for marine environmental protection and countering ecological threats	Environmental protection; response to pollution	Baltic states; HELCOM
2023	Expansion of EU initiatives on port infrastructure protection and cybersecurity	Critical infrastructure protection; data security	European Commission; EMSA; EFCA; Frontex
2024	Operation "Multipurpose Maritime Operation Baltic Sea 2024 and 2025" (co-ordinated by Frontex, EFCA, EMSA)	Border control; navigation safety; environmental protection; combating illegal activities	Poland, Finland, Estonia, Latvia, Lithuania; EU agencies
2024	"Porvoo Declaration" within the CBSS	Strengthening coordination and co-operation in the face of hybrid threats at sea	CBSS member states
2025	Poland assumes the CBSS Presidency (July 2025–June 2026)	Priorities: security; stability; undersea infrastructure; regional identity	Poland + CBSS member states
2025	Meeting of the "shadow fleet" Expert Group	Identifying and countering illegal transport fleets and threats to undersea infrastructure	Belgium, Denmark, Estonia, Finland, France, Germany, Iceland, Latvia, Lithuania, the Netherlands, Norway, Poland, Sweden, the United Kingdom
2025	NATO launches Operation "Baltic Sentry"	Protection of undersea critical infrastructure; military co-operation	NATO; Baltic region states

Own elaboration

To date, the CBSS's maritime-security activities have primarily been preventive and coordinating in nature. Through the MUNIRISK and MUNIMAP projects, member states worked on clearing the seabed of legacy munitions and on developing and protecting shipping and infrastructure. At the same time, they implemented strategic and

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crisis-communication initiatives aimed at increasing societal and institutional readiness, often also in response to maritime incidents. Currently, the Council is becoming more active in the maritime-technology sector, taking up "green corridor" initiatives and plans to create a "digital twin" for shipping.[60] Nonetheless, it still operates mainly through expert networks and cross-border projects, serving as a forum for political consultation.

Towards military security in the BSR

Following Finland and Sweden's accession to NATO, it has become easier in the BSR to coordinate military planning and align NORDEFCO structures with NATO operational and defence plans. In April 2024, N5 defence ministers signed the strategic document "Vision for Nordic Defence Cooperation 2030,"[61] indicating that Nordic co-operation should lead to a genuine capacity to conduct joint military operations; in September, they then endorsed the periodically updated "Nordic Defence Concept."[62] This is an action plan that envisages increasing the scale and scope of joint exercises and operations, strengthening military interoperability, protecting critical infrastructure, and improving crisis management (streamlining border procedures, managing land and maritime transport, and NATO logistics). NORDEFCO does not focus solely on armed forces—it also develops the concept of "total defence," integrating the military with civilian services, critical infrastructure protection, the private sector and society. Activities include joint crisis-response exercises for scenarios such as cyberattacks, sabotage of energy infrastructure and disinformation.

A key instrument of defence co-operation among Northern European states—directly affecting BSR security—is the Joint Expeditionary Force (JEF), a military co-operation format designed for rapid response and expeditionary operations, led by the United Kingdom and established in 2014.[63] After 2022, the JEF intensified reassurance and deterrence missions in the region and provided Northern European leaders with a political forum to coordinate support for Ukraine. President Zelenskyy participated in several JEF leaders' meetings, and Ukraine was invited to observe exercises.[64] In No-

60 "Baseline Report on Marine Digital Twins and Green Shipping Corridors in the Baltic Sea Region," CBSS, 4 June 2025, www.cbss.org.

61 "Joint vision to enhance Nordic defence cooperation," Government Offices of Sweden, 30 April 2024, www.government.se.

62 A. Edvardsen, B.A. Hansen, "Nordic Defense Cooperation Strengthened With New Joint Concept," *High North News*, 24 September 2024, www.highnorthnews.com.

63 JEF is not formally part of NATO, but operates in a complementary manner to NATO, specialising in the Baltic Sea, North Atlantic and High North regions.

64 S. Monaghan, "The Joint Expeditionary Force: From Northern Europe to Ukraine," CSIS, 14 December 2024, www.csis.org.

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vember 2023, the JEF launched its "Response Option" mechanism for the first time—a rapid-response in the context of protecting undersea infrastructure. In December 2023, this resulted in the deployment of maritime and air assets in the JEF area of operations as a military contribution to safeguarding critical infrastructure, strengthening joint action with NATO in the BSR. In January 2025, the JEF then launched Nordic Warden (a UK-led reaction system), a monitoring system for maritime-infrastructure threats and "shadow fleet" activity, supporting risk assessment related to vessels entering sensitive areas.

Table 9

Key regional formats in the area of maritime security and critical infrastructure

STATE	NB8	NORTHERN GROUP	JEF	CBSS	NORDEFCO	BALDEFCOOP	BEMIP	NCM / NORDIC COUNCIL
Denmark	■	■	■	■	■		■	■
Estonia	■	■	■	■		■	■	
Finland	■	■	■	■	■		■	■
Germany		■		■			■	
Iceland	■	■	■	■	■			■
Latvia	■	■	■	■		■	■	
Lithuania	■	■	■	■	■			■
Netherlands		■	■					
Norway	■	■	■	■	■			■
Poland		■		■			■	
Sweden		■	■	■	■		■	■
United Kingdom		■	■					

Own elaboration

Table 10

Security types and key co-operation formats in the BSR

SECURITY TYPES	KEY FORMATS
Military (hard security)	JEF, NORDEFCO, Northern Group, NB8, BALDEFCOOP
Energy and infrastructure	BSESI, BEMIP, Memorandum 2025, CBSS
Ecological / environmental	HELCOM, EUSBSR
Societal and digital (soft security)	CBSS, BSTF, BSRBCC, NB8, Baltic Cyber Network

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Table 11

Areas of regional co-operation for Baltic Sea security

DOMAIN	INSTITUTIONS / ORGANISATIONS AND MECHANISMS	EFFECTIVENESS ASSESSMENT	CHALLENGES
Military	NATO, NORDEFCO, JEF, eFP, Northern Group	High	military mobility; capability disparities; transport infrastructure
Political	CBSS, EU, NB8	Medium	differences in strategic interests; energy-policy coherence; organisational culture
Intelligence	NATO Fusion Centre	High	legal and organisational frameworks; protection of classified information

Own compilation

In response to growing threats, intelligence co-operation in the region is also developing, with NATO's Intelligence Fusion Centre playing a key role alongside networks for exchanging intelligence information among regional states—especially Estonia, Latvia, Lithuania, Poland and Finland. The role of joint military reconnaissance within the Alliance is increasing as well, including permanent data exchange (SIGINT, IMINT, ISR).[65] In cyber security, NATO's Cooperative Cyber Defence Centre of Excellence (CCD-COE) in Tallinn and the European Centre of Excellence for Countering Hybrid Threats (Hybrid CoE) in Helsinki are particularly important. Sweden, Finland and Estonia are intensifying cyber-intelligence co-operation. Regional counter-intelligence efforts translate, for example, into more granular mapping of networks active under diplomatic cover. Regional initiatives to monitor disinformation and influence operations have become an important component of resilience against external interference. Co-operation mechanisms among intelligence and cyber-security services are functioning increasingly effectively, especially in early warning and the identification of hybrid activity.[66] Their constraints stem mainly from differences in data-protection regulations and the protection of information sources. Between 2022 and 2025, regional co-operation also evolved from crisis management towards more permanent, institutionalised mechanisms, including in intelligence and ISR. In practice, current BSR co-operation focuses on four operational priorities: cyber security; developing maritime domain awareness (MDA); countering information operations

65 D. Barrie, N. Childs, Y. Michel, E. Sabatino, B. Schreer, "Northern Europe, The Arctic and The Baltic: The ISR Gap," The International Institute for Strategic Studies, December 2022, www.iiss.org.

66 I. Trusewicz, „Wysoka gotowość na Bałtyku. Finowie ostrzegają i wypuszczają podejrzany tankowiec," *Rzeczpospolita*, 4 March 2025, www.rp.pl; „Rosyjskie drony nad Niemcami? Nowe ustalenia wywiadu, jest polski wątek," Polskie Radio 24, 28 August 2025, www.polskieradio24.pl.

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(including disinformation); and co-ordinating the detection and neutralisation of hybrid threats.[67]

Barriers to regional co-operation in the Baltic Sea Region

Since 2022, the BSR states have been successfully intensifying co-operation, and this trend is likely to continue. However, given the region's significant diversity (from states' organisational affiliations, through varying levels of engagement in different formats, to divergences in strategic interests and differences in sectoral policies), constraints persist. These include political and institutional impediments, as well as obstacles at the level of operationalisation.

Differences in the status of states vis-à-vis the EU (membership, EEA participation, bilateral arrangements) and the resulting regulatory and decision-making frameworks can generate political and procedural barriers—although, on strategic issues, especially policy towards Russia, a broad consensus is visible. Another challenge lies in the differing approaches to national priorities (the Nordic states traditionally focus on ecology, innovation, and biodiversity, whereas Poland and the Baltic states place greater emphasis on security–especially energy security–taking a more utilitarian approach to environmental and development issues). A lack of coherence also appears in sectoral policies (nuclear energy, climate policy, as well as maritime transport, broader maritime policy versus agriculture). Despite this, because military security has become a priority, several barriers that impacted co-operation even before 2022 have been effectively removed, and the CBSS is at a pivotal moment to increase its importance as an intergovernmental organisation.

A key barrier to co-operation across the BSR is found in institutional and procedural divergence: dispersed competences across ministries and agencies, different models of maritime administration, and varying standards for information and data protection. At the operational level, co-operation is further hindered by significant differences in national regulations and administrative procedures—including differing public procurement systems, labour law and environmental requirements—which slow the mobilisation of resources and the implementation of cross-border activities. An additional constraint is the lack of consistent data and shared technical standards, particularly in marine environmental management, fisheries, and maritime and rail transport, which limits interoperability and the comparability of information used in decision-making. As a result, response times lengthen, and the predictability of crisis-management coordination decreases.

67 "Covert Intelligence Operations in the Baltic Sea: Uncovering Subtle Threats," *The War Room*, 2 November 2025, www.inthewaroom.com.

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Transatlantic Cooperation

Paweł Markiewicz

US and Canada naval strategies and the Baltic Sea

The US and Canada are strengthening their relationships with the Baltic Sea region in critical domains, including trade and energy. In the military context, current US policy expects European partners to assume a larger burden of regional defence while aiming to continue close cooperation with allies, like those in the BSR, fulfilling their security commitments, for example, on important defence expenditures. For Canada, its military mission in the Baltic region, which signals a commitment to transatlantic security, will likely continue.

In the future, however, the US and Canada will need to increase their naval activity in the Baltic Sea zone to help deter further aggression from Russia. The US Navy (USN) is a key foreign policy tool, projecting American power and influence through port calls, Freedom of Navigation Operations (FONOPS), and demonstrations of combat capabilities. The USN's primary goal is to have sufficient naval forces to protect US interests and maintain control over North American coastal waters and key sea or shipping lanes, ensuring open access to global markets through free trade.[68] This is critical for deterring or countering rivals who seek to destabilise the global maritime environment based on the rules-based international order. In the 1980s, the Reagan administration pursued an ambitious program to develop a large 600-ship naval fleet, competing with the Soviet Union in the waters of the North Atlantic and North Pacific.[69] Recently, Presidents Trump and Biden have reprioritised USN modernisation to reassert naval dominance based on domestic shipbuilding projects or with partners, while strategically preparing the navy for long-term challenges from China and Russia.[70]

Canada is a maritime nation that also depends on maintaining the existing international order to preserve its sovereignty and maintain access to global markets and digital communications (for example, undersea fibre optic cables for financial transactions). The updated 2024 Defence Strategy highlights the critical role of the Royal Canadian Navy (RCN) in maintaining the capability of the Canadian Armed Forces (CAF) to participate in military operations. It prioritises a naval modernisation program

68 J. Masters, "Sea Power: The U.S. Navy and Foreign Policy," Council on Foreign Relations Backgrounder, 12 June 2024, www.cfr.org.

69 J. Lehman, *Oceans Ventured. Winning the Cold War at Sea*, Norton and Co., 2018.

70 See: B. Sadler, *U.S. Naval Power in the 21st Century. A New Strategy for Facing the Chinese and Russian Threat*, Naval Institute Press, 2023.

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to acquire and produce the latest ships, including submarines,[71] that will enable the RCN to defend Canada and North America, while maintaining a fleet capable of supporting NATO and cooperating with key allies and partners.[72] Recently published strategic documents for the Arctic (2024)[73] and Indo-Pacific (2022)[74] emphasise the RCN's key role in maintaining security, upholding sovereignty, and responding to increased Russian and Chinese activity in these regions. Meanwhile, the RCN's role in securing and defending the Euro-Atlantic area is rooted in NATO.

Russia seeks to recreate its Cold War sphere of influence on the Baltic Sea region. During the Cold War, the sea became an important area of observation and operation for the US and Canada, acting as a maritime buffer zone in their rivalry with the Soviet Union. The US and its allies viewed the Baltic as a sea providing Soviet and Warsaw Pact forces with additional access to the Atlantic. NATO forces, led by the USN, planned containment operations in the Baltic Sea to deny the adversary access to the North Sea, the Norwegian Sea or the Barents Sea (and, more broadly, to North Atlantic and Arctic waters), for example, by conducting intelligence and reconnaissance operations. Rare incidents occurred, such as in 1950, when the Soviet Union shot down an American reconnaissance aircraft over the Baltic Sea.[75] FONOPS exercises and the deployment of USN warships to the Baltic Sea (for example, the USS Iowa in 1985 and 1989) challenged the Soviets' closed sea policy aimed at completely controlling the Baltic basin, including the western outlet to the North Sea, in order to limit Western maritime access to Baltic waters.[76] The division between spheres of influence in the Baltic Sea ended after the Cold War, when it transformed from a militarised area into a zone of regional and naval cooperation.[77]

Regional security in the transatlantic context

The interests and involvement of the US and Canada in the Baltic Sea region are largely tied to potential Russian aggression against partners and allies in the region or, more

71 K. Todd, "Redesigning the Royal Canadian Navy for a More Dangerous World," *CGAI and Triple Helix Policy Perspective*, January 2025, www.cgai.ca.

72 "Our North, Strong and Free. A Renewed Vision for Canada's Defence," Government of Canada, Department of National Defence, 2024, www.canada.ca.

73 "Canada's Arctic Foreign Policy," Government of Canada, 2024; "Canadian Coast Guard Arctic Strategy," Canadian Coast Guard, 2024, www.ccg-gcc.gc.ca.

74 "Canada's Indo-Pacific Strategy," Government of Canada, 2024, www.international.gc.ca.

75 J. Schindler, "A Dangerous Business. The U.S. Navy and National Reconnaissance during the Cold War," National Security Agency Center for Cryptologic History, Fort George G. Meade 2004, pp. 2-4, https://www.nsa.gov.

76 H.G. Morgan Jr., "Soviet Policy in the Baltic," *U.S. Naval Institute Proceedings*, vol. 86, No. 4, April 1960.

77 K.B. Jensen, "The Baltic Sea in the Post-Cold War World," *Naval War College Review*, vol. 46, No. 4, 1993.

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broadly, Central and Eastern Europe as a whole. Russia views the Baltic Sea as strategically linked to the Arctic[78] and will seek to utilise both waters for its own commercial, military, and strategic purposes, together with partners such as China and Iran.

After the Cold War, the US engaged in stabilising the Baltic Sea region as part of the new European security architecture. NATO was the primary driver. Three waves of NATO enlargement in 1999 (Poland), 2004 (Lithuania, Latvia, Estonia), and 2024 (Finland and Sweden) strengthened the region's transatlantic ties, deepened military interoperability among allies, and ensured territorial integrity, including coastal waters. As a framework nation for NATO's multinational Enhanced Forward Presence (eFP) battlegroup in Latvia, Canada is also committed to maintaining security in the Baltic Sea.

For the countries of the region, multilateral naval exercises involving the USN and RCN are crucial to defending and deterring against Russian aggression on the Baltic Sea and the broader CEE region. This cooperation signals a commitment to security in the broader Euro-Atlantic area. Exercises like Baltic Operations (BALTOPS) and Northern Coasts (NoCo) increase interoperability between North American forces and European allies, which are modernising their naval fleets and coast guards in key areas, for example, mine clearance operations and amphibious warfare. As part of Operation Reassurance (CAF's largest overseas military mission), Canada provides coastal defence ships or RCN frigates for joint exercises in the Baltic Sea, including NATO Standing Maritime Group 1 (SNMG1) and NATO Standing Mine Countermeasures Group 1 (SNMCMG1).[79] In September 2025, the USN destroyer USS Buckley participated for the first time in exercise Baltic Sentry—NATO's newest mission in the Baltic Sea, aimed at, among others, detecting and countering Russian hybrid activity.[80]

Air defence operations over the Baltic Sea are also crucial to countering Russian airspace incursions and aggression, such as drone attacks. During exercise Neptune Strike 25-3, US fighter jets practised long-range strikes over the Baltic Sea, launching from the aircraft carrier USS Gerald R. Ford operating in the North Sea, joining US attack helicopters deployed from the guided-missile destroyer USS Bainbridge in the Baltic. In the past, Canada has provided rotational contributions of several fighter jets (CF-18 Hornets) to NATO's Baltic Air Policing mission.[81]

78 F.S. Hansen, "Russian military thinking about the Baltic Sea and the Arctic," *DIIS Policy Brief*, 14 February 2025.

79 "HMCS Ships Edmonton and Yellowknife Depart for NATO Mine Countermeasures Mission in Europe," Government of Canada, National Defence, 7 July 2025, www.canada.ca.

80 A. Bath, "Navy Destroyer joins NATO Baltic Sea Mission amid growing drone concerns," *Stars and Stripes*, 1 October 2025, www.stripes.com.

81 C. Leuprecht, J. Sokolsky, "Canada's Enhanced Forward Presence in the Baltics: An Enduring Commitment to Transatlantic Security," CDA Institute, 2018, www.cdainstitute.ca.

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Transatlantic political coordination in the Baltic Sea Region

Security cooperation between the US, Canada, and partners in the Baltic Sea region is primarily coordinated on a bilateral basis at the political level. While neither the US nor Canada have prioritised these ties in the past, they have significantly strengthened since Russia invaded Ukraine in 2022, serving as a regional deterrent. For the majority of states in the Baltic region, which were formerly part of the Soviet Union or within its sphere of influence, political relations with the US and Canada are crucial to countering Russian demands for a return to spheres of influence in Europe. Regular strategic dialogues (for example, between the US and Baltic states or the US and the Nordic countries) or recently concluded strategic partnerships (such as between Canada and Poland or Canada and Finland, both in 2025) have led to increased coordination in important sectors such as combating financial crimes, energy security, countering disinformation, cooperating on cybersecurity and sanctions against Russia. This also applies to hard security issues. During the first Trump administration in 2020, the US Congress directed the Department of Defense to establish the Baltic Security Initiative (BSI), a program aimed at strengthening the defence capabilities and military interoperability of the Baltic states to deter Russian aggression. Between 2021 and 2025, over $1 billion in federal funding was allocated, among others, to purchase essential military equipment from the US (for example, HIMARS and JAVELIN systems). For 2026, the Trump administration allocated $200 million under the BSI program.

This broad range of policy cooperation serves to build cross-government relationships between various US or Canadian departments and ministries or agencies of Baltic Sea littoral states to strengthen institutional resilience, build public trust, and deterrence, especially in the area of cybersecurity.

Political coordination also takes place at the multilateral and minilateral levels. Trilateral coordination, like the political dialogue between the Baltic States and the US (held regularly since 2016), is a mechanism aimed at strengthening regional cooperation, including on sanctions against Russia and energy transition. The trilateral ICE Pact, concluded in 2024 between the US, Finland, and Canada, aims to accelerate technological development in icebreakers to, among others, counter Russian influence in the Arctic. Regional mechanisms are also embedded in multilateral forums, in which the US is a strategic partner (for example, the Three Seas Initiative, 3SI) or an observer (the Council of the Baltic Sea States).

For Canada, multilateralism has traditionally been a pillar of foreign policy in pursuing economic and security interests with partners and regions beyond North America,

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for example, the Baltic Sea region.[82] As head of the G7 in 2025, one of Canada's key priorities was working with its partners to secure supplies of critical raw materials (for example, rare earth minerals), energy, and strengthen maritime supply chains. During the G7 Foreign Ministers meeting in March 2025, a declaration tabled by Canada was adopted, which established a Shadow Fleet Task Force to counter illegal and harmful Russian maritime activities, including on the Baltic Sea.[83] To this end, Canada is strengthening cooperation with G7 partners and allies in the Baltic Sea region, including Poland, which may translate into greater involvement in key regional multilateral initiatives, for example, 3SI and the Council of Baltic Sea States.

Threats to transatlantic cooperation

A drawdown of US military resources and strategic withdrawal from Europe would severely limit transatlantic cooperation on the Baltic Sea, relegating it to the background as a region of secondary, or even tertiary, importance to American security, weakening deterrence and defence capabilities against Russia. In light of the Trump administration's current priorities and strategic outlook described in its National Security and National Defence strategies, which emphasised that European allies and partners should bear the greater responsibility for defending the Continent, such a possibility should be considered a major challenge for the Baltic Sea region. The US views the Indo-Pacific region as a key area of future competition with China.[84] Unlike his predecessors, Trump announced the transfer of more USN assets (for example, nuclear-powered submarines) to Pearl Harbor, Hawaii, which will be upgraded to a major base for navy ships armed with hypersonic weapons (Zumwalt-class destroyers and Virginia-class submarines) by 2028. In the Western Hemisphere,[85] the Trump administration recognises the need to enhance security to counter China and Russia's influence in Latin America and the Arctic, while also combating illegal migration, organised crime, and drug trafficking, which directly impact national defence.[86] In January 2026, the administration conducted a successful military operation, detaining Venezuelan leader Nicolas Maduro and his wife by extraditing them to the US. Trump's plan to control and administer Venezuela signal a desire by the US to rebuild influence in Latin America. Aggressive actions against Greenland, in turn, are consistent with Trump's

82 B. Kelly, "Canada in the World: The Multilateralist Tradition in Canadian Foreign Policy," Centre for International Governance Innovation, 25 April 2022, www.cigionline.org.

83 "G7 Foreign Ministers' Declaration on Maritime Security and Prosperity," 14 March 2025, www.g7.canada.ca.

84 E. Colby, *The Strategy of Denial. American Defense in an Age of Great Power Competition*, Yale University Press, New Haven 2021.

85 S.P. Rosen, "A Better Way to Defend America," *Foreign Affairs*, 14 March 2025, www.foreignaffairs.com.

86 B. Znojek, "The U.S. Pursues Increasingly Aggressive Policy towards Latin America," *PISM Bulletin*, No. 34 (2535), 17 March 2025, www.pism.pl.

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efforts to strengthen control over the Western Hemisphere, securing its own defence interests in the Arctic in the process.

In the case of Canada, the latest strategic documents, including its updated defence strategy, prioritise the security of the country and the North American continent. While Canada remains committed to close cooperation with its NATO allies in Europe and serves as a framework nation for the multinational battlegroup in Latvia, its priority is strengthening security in the Arctic, which is becoming a key pillar in the defence of the Alliance's northern flank. Many of the investments in CAF technical modernisation in the near future, including in RCN capabilities, will be directed toward strengthening military capabilities in this region. Furthermore, Canada's growing security engagement in the Indo-Pacific region—viewed in the context of defending NATO's western flank—may come at the expense of attention and activity in Europe. As part of this regional strategy, Canada deploys 2-3 warships annually to the Indo-Pacific.

Bilateral tensions and diverging interests between the US and Canada could also adversely affect European security, including on the Baltic Sea. Historically, the US and Canada have consistently coordinated support for the sovereignty of CEE nations. Both are committed to NATO's fundamental values while condemning Russia's aggression against Ukraine in 2022 and its illegal annexation of Crimea in 2014. Division on key issues affecting Euro-Atlantic stability and security, including continued support for Ukraine, NATO's role in Europe, and postwar relations with Russia, will weaken transatlantic unity, minimising the deterrent effect on future Russian aggression, especially in the Baltic Sea region, and discrediting the concept of collective defence, particularly in the maritime domain. However, decisions made by the federal government to diversify relations away from the US, in response to President Trump's aggressive policy towards America's northern neighbour, have caused Canada to turn towards Europe, particularly with regard to strengthening defence ties. These bilateral strategic partnerships, as well as those with the EU, create new opportunities and demonstrate Canada's commitment to European security and stability in various regions, including the Baltic Sea.

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From Deterrence to Resilience—Recommendations

Military Capabilities

Filip Bryjka, Aleksandra Kozioł

- **Uncertainty about the future of American military involvement in Europe increases the risk of weakening the ability to defend and deter Russia in the BSR, forcing European states of the Alliance to increase their military involvement in defending the north-eastern flank.**
- **First and foremost, the BSR states should, as soon as possible:**
  - **increase their military spending to 5% of GDP, in line with the declarations of the NATO summit in The Hague in 2025;**
  - **increase their own defence capabilities, especially in the areas of air defence, long-range strike capabilities, electronic warfare, and satellite reconnaissance;**
  - **strengthen military cooperation in order to influence Russia's calculations and deter it from carrying out offensive operations against them.**
- **A key area will be improving interoperability, i.e. the efficient cooperation of NATO and EU forces. This could be achieved through large-scale multi-domain exercises involving the NATO Joint Warfare Centre in Stavanger (Norway), JFC Norfolk and JFC Brunssum, as well as regular naval exercises in the Baltic Sea under the command of the Military Planning and Conduct Capability (MPCC).**

The build-up of military capabilities in the north-west indicates Russia's readiness to escalate the situation in the BSR. Although in the short term Russia is unlikely to have

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the military potential to wage a full-scale war against NATO, it may acquire credible capabilities to conduct a limited offensive operation. In this way, it will attempt to undermine the credibility of the Alliance. The occupation of a small territory of one or more countries in the BSR would complicate the calculations on the part of the allies and lead to a situation in which some Western leaders would be reluctant to respond militarily, partly due to fears of direct confrontation with Russia and further escalation to the nuclear level. This model of action is also in line with Russia's strategy of creating a "grey security zone" in Central Europe and would be relatively easy to implement due to the geographical proximity and military shortcomings of the BSR states.

Uncertainty about the future of American military involvement in Europe increases the risk of weakening the ability to defend and deter Russia in the BSR, forcing European states of the Alliance to increase their military involvement in defending the north-eastern flank. In order to influence Russia's calculations and deter it from carrying out offensive operations against them, the BSR states should, first and foremost, increase their military spending to 5% of GDP as soon as possible, in line with the declarations of the NATO summit in The Hague in 2025, increase their own defence capabilities (especially in the areas of air defence, long-range strike capabilities, electronic warfare, and satellite reconnaissance) and strengthen military cooperation.

However, an effective response to growing military pressure from Russia will not be possible without the involvement of all NATO states and the coordination of efforts to strengthen defence capabilities with the EU. A key area will be improving interoperability, i.e. the efficient cooperation of Alliance forces through large-scale multi-domain exercises involving the NATO Joint Warfare Centre in Stavanger (Norway), JFC Norfolk and JFC Brunssum. In this way, NATO will strengthen the coherence of its defence planning and demonstrate its readiness to defend its territory. Although the EU does not strictly carry out military tasks, it already has formats for cooperation between Member States that can complement the Alliance's capabilities to defend and deter Russia. In this context, it would be crucial to organise regular naval exercises in the Baltic Sea, which would enable European states and the MPCC to test their cooperation in operational conditions. It would be worthwhile for EU states, if necessary replace or complement NATO's activities, to also consider the possibility of launching a coordinated maritime presence in order to build a military advantage over Russia in the Baltic and North Seas, and potentially also in the Arctic.

The convergence in the assessment of the threat posed by Russia should also encourage the BSR states to deepen their cooperation in the armament sector. Joint investments in the development of armaments and defence technologies would facilitate the acquisition of new equipment and the coordination of the modernisation of the armed forces. Joint development projects would also strengthen the European arms sector, taking into account the needs of Central and Northern Europe, which is one

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of the EU's priorities for the coming years. This would also promote standardisation and improve the interoperability of European armed forces in general. An example of measures to strengthen capabilities in the BSR is Poland's purchase, under the "Orka" programme, of Swedish-made A26 submarines, which are primarily intended for operations in the shallow waters of the Baltic Sea.

An additional element strengthening security in the BSR could be the United Kingdom's consideration of extending the Joint Expeditionary Forces (JEF) initiative to Poland. Cooperation in this format, which complements NATO capabilities, would further increase flexibility in responding to a military crisis with Russia. For Poland, it would be beneficial to strengthen its military presence and coordination of activities in the Baltic and North Seas in this way, and it would also create an additional platform for cooperation with key partners in the region, such as the UK and the Nordic countries.

Protection against Threats

Filip Bryjka, Aleksandra Kozioł

- **The wide range of hybrid threats has a destabilising effect on the situation in the BSR, reducing the ability of the states in the region to strengthen their resilience. Despite the multitude of urgent security challenges generated by Russia in various domains, it is crucial to coordinate and prioritise actions while simultaneously focusing on current tasks and formulating effective medium-term policies.**
- **A key element of security in the BSR should be strengthening intelligence cooperation, regional cooperation, and exchange of experiences between services such as border guards, coast guards, and police through specialised training focused on identifying and neutralising hybrid threats.**
- **It will also be important to modernise their equipment, including advanced sensors and unmanned platforms (such as surface and underwater drones), as well as improved coordination with the military (including navies) within the CISE.**
- **A "total defence" approach should be developed, including training for the population, including in crisis response, mechanisms for cooperation with local authorities, and mobilisation systems.**

In Russia's strategy, hybrid operations precede military attacks, serving as a means of testing the resilience of individual states and the coherence of the Alliance's response.

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Russia is intensifying hybrid operations targeting BSR states, using various methods such as migration pressure, infrastructure sabotage, GPS jamming, cyberattacks, and disinformation. Such a wide range of threats makes them difficult to prevent and combat, and offers Russia a relatively cheap and effective way of influencing the region's states. This has a destabilising effect on the situation in the BSR and reduces the ability of the states in the region to strengthen their resilience. The multitude of urgent security challenges generated by Russia in various domains hinders the coordination and prioritisation of actions, forcing the BSR states to focus on current tasks and making it difficult to formulate effective medium-term policies.

Therefore, a key element of security in the BSR should be strengthening intelligence cooperation, regional cooperation, and exchange of experiences between services such as border guards, coast guards, and police through specialised training focused on identifying and neutralising hybrid threats. It will also be important to modernise their equipment, including modern sensors and unmanned platforms (such as surface and underwater drones), as well as improved coordination with the military (including navies) within the CISE.

Due to the nature of hybrid threats, which affect society as a whole, BSR states should also significantly increase spending on strengthening their resilience. A "total defence" approach should be developed, including training for the population, including in crisis response, mechanisms for cooperation with local authorities, and mobilisation systems. States such as Finland and Sweden, as well as Lithuania, include broad public participation in activities supporting the army and administration during wartime in their defence plans. Poland could use the experience gained by these states to involve not only the reserves in defence, but also to make use of civilian competences for defence and civil protection, and to increase resilience in the information and digital spheres. In the context of hybrid warfare, where the line between "peacetime" and "conflict" is blurred, the ability of society to respond becomes an important element of deterrence.

This also requires deeper cooperation between the BSR states. The exchange of experiences and good practices in the field of "total defence" should become a key element in strengthening the resilience of NATO's north-eastern flank. The Nordic and Baltic countries and Poland are gradually aligning their defence preparedness models, although each is developing at a different pace and has different institutional traditions. Cooperation, including rapid information exchange, is particularly important in this regard due to the potential for the effects of a hybrid attack against one state to spill over to others. The BSR states would benefit from holding regular consultations between crisis response authorities and organise joint exercises to strengthen the interoperability of their services and cooperation between state administration bodies and the private sector. To this end, they could, for example, establish a regional centre of excellence

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that would take into account the security of the Baltic and North Seas, as well as the Arctic. This would facilitate the implementation of modern solutions to combat hybrid threats and standardise response procedures, including a "total defence" approach.

Energy and Infrastructure

Tymon Pastucha

- **The BSR states should pursue coherent strategic signalling vis-à-vis Russia, making it explicit that actions targeting critical infrastructure and maritime navigation will entail tangible economic and political costs (including "shadow fleet").**
- **States in the region should adapt their national regulations and harmonise cross-border procedures in order to respond promptly and lawfully to new threats to critical infrastructure in emergency situations. At the same time, they should cooperate within the EU to strengthen and tighten Western energy sanctions, particularly against Russia's "shadow fleet."**
- **In order to reduce their dependence on fossil fuel imports, states in the region should accelerate the development of low-emission power generation, particularly by strengthening regional economic and technological cooperation to implement modern, resilient offshore energy solutions.**

The BSR countries should pursue coherent strategic signalling vis-à-vis Russia, making it explicit that actions targeting critical infrastructure and maritime navigation (including sabotage and espionage) will entail tangible political, economic and/or military costs. Consistent enforcement of such consequences would strengthen deterrence and reduce Russia's incentives to escalate. Regional states should agree on flexible frameworks defining the range of permissible countermeasures, including retaliatory measures such as detaining and inspecting vessels transiting through their territorial waters and exclusive economic zones (EEZs). Over the longer term—given the Baltic Sea's critical importance for Russia—this approach may sustainably reduce the risk of incidents.

The countries of the region, working through a reformed Council of the Baltic Sea States (CBSS) with a strengthened coordinating role in maritime security and critical infrastructure protection, should conduct regular risk assessments of Baltic Sea infrastructure using a common methodology and involving all relevant stakeholders, including ministries responsible for energy and the environment, private and public

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critical infrastructure operators, and shipping companies. National strategies and policies should then be updated on an ongoing basis. Key findings should then be shared with neighbouring partners (e.g. Norway and the United Kingdom) and NATO, enabling more effective threat detection and response.

States should clearly establish and reinforce their leading role in the critical infrastructure protection system, from planning and oversight to crisis response, in relation to critical infrastructure operators and owners (both public and private). This should be supported by strengthening the capacities and competences of maritime administrations, services and navies, as well as improving interstate coordination. At the same time, mandatory security requirements for critical infrastructure operators and owners should be increased and standardised across the region.

In order to reduce risk concentration and increase system flexibility, regional states should accelerate the expansion of diversified import and port infrastructure (e.g. LNG and oil terminals) and further develop onshore and offshore electricity and gas interconnections (including, inter alia, the development of the hydrogen economy). In parallel, they should enhance national storage capacities for oil, gas and fuels, increasing geographical dispersion and maintaining high stock levels linked to seasonal filling targets. These mechanisms could be extended through regional contingency planning, including rationing frameworks, fuel interconnections and emergency capacities, as well as regular exercises involving energy infrastructure operators, public administrations and relevant services. At the regional level, solidarity and cross-border exchange arrangements should be standardised to enable the rapid re-routing of volumes in the event of disruptions.

Joint efforts are also required to adapt the legal environment to emerging threats to critical infrastructure. This includes updating the interpretation and application of maritime law. Poland could review its national legislation and utilise its full jurisdictional powers under the United Nations Convention on the Law of the Sea (UNCLOS) to close gaps in criminal, civil and administrative law that currently enable hybrid activities. Cross-border regulations and procedures must be harmonised to enable rapid and lawful enforcement actions in situations where the incident location and the perpetrator fall under different jurisdictions. Information-sharing and attribution mechanisms must be strengthened to ensure that operational decisions are based on robust evidence and legal foundations, enabling effective accountability through the courts. Coordinated diplomatic efforts should be made to reinforce the enforcement of obligations under Article 113 of UNCLOS, to promote universal compliance with the Convention and to develop new international rules to protect subsea infrastructure. At the level of the entire Baltic Sea region, states should work towards adopting a regional agreement that clarifies all issues related to the security of maritime critical infrastructure.

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To reduce dependence on imported fossil fuels, regional states should accelerate the development of low-emission power generation. In this context, investments in offshore wind farms, grid development, energy storage, nuclear power and modern technologies (e.g. hydrogen solutions and small modular reactors (SMRs) are important. In particular, public financial and operational support should mitigate costs arising from the risks generated by Russia's actions. Strengthening supply chains for these technologies and expanding domestic manufacturing and installation capacities are also essential. At the same time, the scientific and innovation base for deploying advanced offshore energy solutions must be reinforced.

The region's countries should work together to strengthen and tighten Western energy sanctions, especially with regard to the risks Russia's "shadow fleet" poses to the Baltic Sea. This requires the further development of monitoring capabilities relating to its operations, the establishment of common procedures and the expansion of the capacity to detain and inspect such vessels.

Strengthening cooperation among all countries is also necessary to prevent and minimise the consequences of environmental disasters, including potential releases of crude oil or petroleum products into the sea. This requires the operational capabilities of the relevant authorities to be strengthened. Regular joint regional exercises involving countries with experience in large-scale disaster response, such as the United States, Norway and Canada, would be valuable.

Strategic Dimension

Paweł Markiewicz

Strengthening long-term transatlantic cooperation in the Baltic Sea Region

- **Countries in the region, including Poland, should deepen their strategic dialogue with the US and Canada in order to develop a common transatlantic position that would include the Baltic Sea as part of security and defence planning of the contiguous Arctic region, constituting its leading southeastern maritime border.**
- **The Baltic Sea—currently virtually surrounded by transatlantic allies and partners—could become crucial for securing European, Arctic, and North Atlantic waters, while also providing the US and Canada a unique opportunity to strengthen alliances and partnerships, which are cru-**

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cial for safeguarding American and Canadian interests in the Western Hemisphere against the ambitions of China and Russia.

- **By combining Arctic and Baltic Sea security, the US and Canada would strengthen their interests in the Baltic Sea region within the broader context of the Arctic's growing global importance, thus strengthening their role in Europe.**

Russia's treatment of the Arctic and Baltic Sea as a single strategic domain means it will continue to simultaneously employ illegal practices, hybrid and kinetic actions, aimed at long-term destabilisation of both areas, further undermining transatlantic solidarity, credibility, and trust between the US, Canada, and their partners in the Baltic Sea region. Therefore, countries in the region, including Poland, should deepen their strategic dialogue with the US and Canada in order to develop a common transatlantic position that would include the Baltic Sea as part of security and defence planning of the contiguous Arctic region, constituting its leading southeastern maritime border. Countries in the region could commit to working with the US and Canada to keep these waters (the Arctic Ocean, the Barents Sea, Norwegian Sea, North Sea, and Baltic Sea) free and open, including through FONOPS, which the USN and RCN, together with allies and partners, have traditionally conducted and are currently conducting in the Indo-Pacific. By combining Arctic and Baltic Sea security, the US and Canada would strengthen their interests in the Baltic Sea region within the broader context of the Arctic's growing global importance, thus strengthening their role in Europe. The Baltic Sea—currently virtually surrounded by transatlantic allies and partners—could become crucial for securing European, Arctic, and North Atlantic waters, while also providing the US and Canada a unique opportunity to strengthen alliances and partnerships, which are crucial for safeguarding American and Canadian interests in the Western Hemisphere against the ambitions of China and Russia.

The USN could increase its operations in the Baltic Sea through regular frigate deployments and rotational port visits to partner nations. Increased USN activity in the region would signal US commitment to partners who significantly contribute to strengthening European security and defence burden-sharing, while also providing a mobile force capable of meeting the growing maritime challenges in the region. Such regular USN maritime operations on the Baltic would enhance air, ballistic, drone, and conventional missile defence; surface and anti-submarine capabilities, and localised depth-based strike capabilities within Russia (in the form of cruise missiles carried by some USN and RCN vessels). A more robust US presence and continued navigation in these waters would also foster a better understanding of the unique Baltic Sea environment, improving USN military readiness through greater experience in shallower waters. Most

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importantly, USN forces addressing the political and technical challenges of collective defence would deepen interoperability and capabilities to help allies and partners.

Canada should consider developing and implementing a Euro-Atlantic strategy that would complement its Indo-Pacific strategy and Arctic policy. This document would formally define Canada's goals and political, economic, and social expectations for the region (at the bilateral and multilateral levels), which could include promoting peace, resilience, and security, especially in the maritime domain. Implementation of the strategy could include, as with the US, regular RCN port calls or deployment of warships to the Baltic Sea. Expanding its naval operations would provide the RCN with a permanent presence in the region, bringing invaluable operational experience to a unique region and enabling Canada to play a broader role in regional security alongside its allies. In this context, Canada could also consider the proposed submarine pact with Norway and Germany[87] to secure the Arctic and North Atlantic, expanding it into a consortium with allies with growing submarine capabilities, including Poland and Sweden, and adding protection of the Baltic Sea. To further strengthen its role in the Euro-Atlantic region, Canada should also prioritise engagement in key CEE multilateral formats, such as 3SI and the Council of Baltic Sea States. This would provide opportunities for deepening economic relations, including in the area of energy transformation and security, while cooperating with partners on issues important to Canada, for example, illegal operations in the maritime sector.

Regional cooperation

Kinga Dudzińska, Amanda Dziubińska

- **In the face of growing and increasingly diverse threats below the threshold of war, BSR states should deepen political co-ordination.**
- **This requires strengthening the role of the Council of the Baltic Sea States as the principal platform for agreeing regional priorities by focusing its mandate on bolstering resilience, readiness and crisis response, and by granting the Council tangible executive tools.**

In the face of growing and increasingly diverse threats below the threshold of war, BSR states should deepen political co-ordination—especially in energy, strategic communications and policy towards Russia—and link it more closely with the operational activities of their armed forces and other services. This requires strengthening the

87 M. Brewster, "Canada, Germany, and Norway discussing a security pact to cover the North Atlantic and Arctic," CBC, 20 June 2024, www.cbc.ca.

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role of the Council of the Baltic Sea States as the principal platform for agreeing regional priorities by focusing its mandate on bolstering resilience, readiness and crisis response, and by granting the Council tangible executive tools: establishing regular consultations involving political directors and officials responsible for security, to ensure continuous alignment of positions and an efficient decision-making pathway; embedding co-operation on civil security and civilian protection on a durable basis, including the development of joint crisis-management procedures and periodic inter-institutional exercises for cross-border crisis scenarios; and concentrating the Council's work on priorities stemming from the current risk profile—protection of critical infrastructure (including undersea infrastructure), strengthening cyber resilience, and countering hybrid activity, including threats linked to the "shadow fleet."

Developing a communications policy

Amanda Dziubińska

- **The BSR states should develop a coherent strategic narrative around the Baltic Sea Region's role in Euro-Atlantic security. This narrative should clearly define why the Baltic is crucial for NATO and the EU, what the region's deterrence and defence objectives are, and what benefits a strengthened allied presence and security investment bring to citizens and economies.**
- **The communications policy should strengthen societal resilience. This entails regularly providing societies with clear explanations of the significance of military exercises, the presence of allied forces, or investments in critical infrastructure, as well as transparent communication about incidents while explaining mitigation measures.**
- **The communications policy must be systematically integrated into efforts to counter disinformation and other information operations conducted by Russia and other actors. Beyond building capacities to monitor and identify harmful narratives, proactive communications are needed–pre-emptively explaining potentially sensitive issues (e.g., the costs of sanctions, increased defence spending, the presence of allied troops) and rapidly debunking false information.**

The BSR states should develop a coherent strategic narrative around the Baltic Sea Region's role in Euro-Atlantic security. This narrative should clearly define why the Baltic is crucial for NATO and the EU, what the region's deterrence and defence objectives are, and what benefits a strengthened allied presence and security investment bring to

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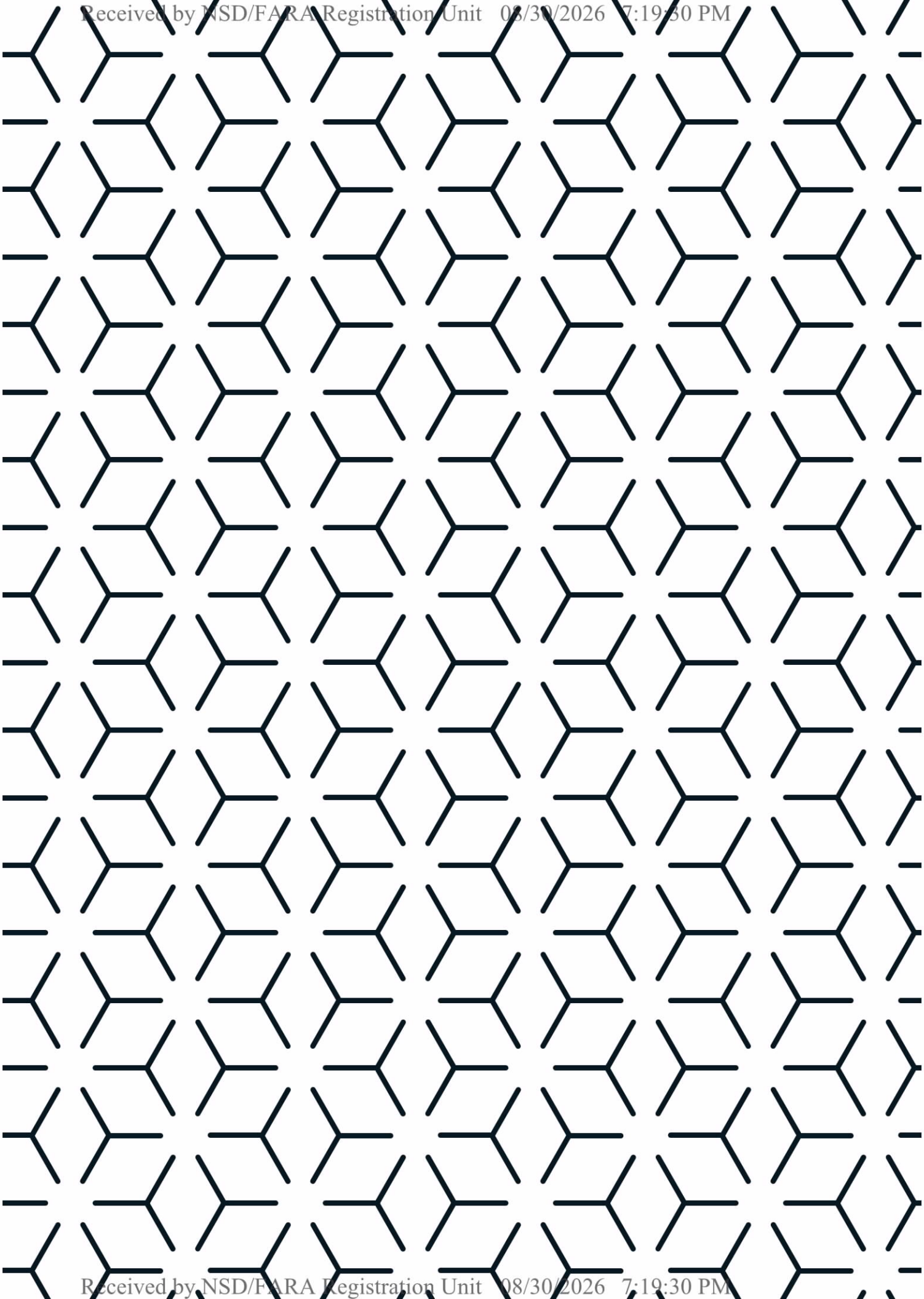
citizens and economies. It is essential to avoid fragmented messaging: different states may emphasise different elements (e.g., military, energy, or environmental threats), but they should anchor these within a shared narrative framework highlighting regional solidarity and the responsibility and predictability of the actions undertaken. The communications policy should strengthen societal resilience. This entails regularly providing societies with clear explanations of the significance of military exercises, the presence of allied forces, or investments in critical infrastructure, as well as transparent communication about incidents (e.g., sabotage, cyber-attacks) while explaining mitigation measures. It should also include the active involvement of experts and academic communities in helping to explain complex security phenomena.

The communications policy must be systematically integrated into efforts to counter disinformation and other information operations conducted by Russia and other actors. Beyond building capacities to monitor and identify harmful narratives, proactive communications are needed–pre-emptively explaining potentially sensitive issues (e.g., the costs of sanctions, increased defence spending, the presence of allied troops) and rapidly debunking false information.

Finally, coordination of strategic communications between regional states and NATO and EU structures should be strengthened. This concerns both the day-to-day alignment of messaging in crisis situations (incidents at sea, infrastructure sabotage, disinformation operations) and the planning of medium- and long-term information campaigns. In practice, this requires establishing permanent information-exchange mechanisms (including early-warning systems for disinformation), joint crisis-communications exercises, and the development of shared information products (e.g., reports, public campaigns).

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Conclusion

Amanda Dziubińska, Aleksandra Kozioł

The Baltic Sea Region is undergoing a profound transformation of its security environment. The processes of strengthening defence capabilities and the growth of multi-dimensional threats from Russia are unfolding in parallel. After 2022, the qualitative changes concern, above all, the way the BSR is perceived–not as a relatively stable "internal sea of the EU and NATO," but as a significant area of strategic competition and a potential high-intensity conflict with Russia, closely linked to the security of the entire north-eastern flank and, more broadly, to security in the Arctic and the North Atlantic. At the same time, the Baltic's growing importance for energy security, climate and digital transitions, and the infrastructural resilience of regional states, means that any crisis in this area can potentially produce pan-European and global effects. The BSR is therefore becoming one of the key reference points for defining a new approach to European security: simultaneously strengthening defence and deterrence, deepening European integration while maintaining a strong transatlantic dimension, and linking military security with the building of civil resilience.

With regard to the change in the region's security level after 2022, the report shows that we are facing a paradox: as defence and deterrence are being strengthened, risks continue to grow. On the one hand, Finland and Sweden's NATO membership, accelerated modernisation of regional armed forces, the Alliance's new operational and defence plans, and the US and other allied military presence create the prospect of a qualitatively new deterrence and defence potential. On the other hand, the risk of escalation with Russia has increased dramatically, and the spectrum of means it employs—from conventional actions to hybrid activity and sabotage of critical infrastructure—has broadened and intensified, turning the region into a sphere of active conflict between Russia and NATO below the threshold of open aggression.

The analysis of NATO and the EU's role in shaping BSR security indicates that their initiatives are complementary but still insufficiently synchronised. NATO measures can increase the credibility of deterrence in the military domain, while EU instruments increasingly seek to shape security conditions in peacetime and crisis. The report also identifies significant gaps: persistent fragmentation of planning processes across both

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organisations, insufficient operationalisation of the declared NATO–EU "complementarity," and limited capacity for joint protection of critical infrastructure. The potential of allied and EU initiatives is therefore considerable, but fuller use of it requires deeper integration of planning, exercises and funding by both organisations.

A fundamental asset for BSR security remains the ability to strengthen regional institutions and mechanisms of political co-operation. The political will and capacity to expand the scope and scale of co-operation among regional states is very clear, although engaging transatlantic partners in the region will remain a challenge. The Nordic and Baltic states, Poland, Germany and other key regional actors have undertaken ambitious programmes of technical modernisation and transformation of their armed forces in recent years, increased defence spending, and developed formats for military and sectoral co-operation. The CBSS is a good example of deepening activity, with states discussing, inter alia, ways of responding to hybrid threats in the region. In the coming years, the foundation of deterrence should remain the engagement of the United States, Canada and other allies from outside the region in exercises, strengthening their military presence, and activities aimed at protecting maritime lines of communication. Persistent transatlantic tensions would weaken strategic coherence and complicate the formulation of durable priorities for the BSR as a whole.

From this perspective, the effectiveness of deterrence and defence in the BSR depends not only on local strengthening of armed forces and infrastructural resilience, but also on the ability to coordinate these efforts with those along the northern axis—particularly the Arctic and the North Atlantic. The Baltic remains the most vulnerable and escalation-prone body of water in this broader theatre.

These challenges, however, also create numerous opportunities for regional states and their partners. Thanks to a relatively high convergence of strategic interests, an extensive network of regional formats and strong anchoring in EU and NATO structures, the BSR can become a model example of building multi-level resilience. Key to achieving this will be replacing reactive crisis management with long-term planning that encompasses not only the military domain, but also energy, infrastructure, the environment, the information sphere and social cohesion. BSR security should be treated as a process. This means that even a significant increase in military capabilities and in the number of political instruments does not guarantee a lasting sense of security if it is not accompanied by the ability to adapt to changing conditions, learn from crisis experience and invest in societal resilience. The role of political and military decision-makers will be particularly important in ensuring adequate funding for defence and infrastructure investment, building a durable political consensus around BSR security priorities, and communicating to societies the necessity of bearing the associated costs. Actions taken in the coming years on strengthening military presence, protecting critical infrastructure, shaping energy policy, technological development and

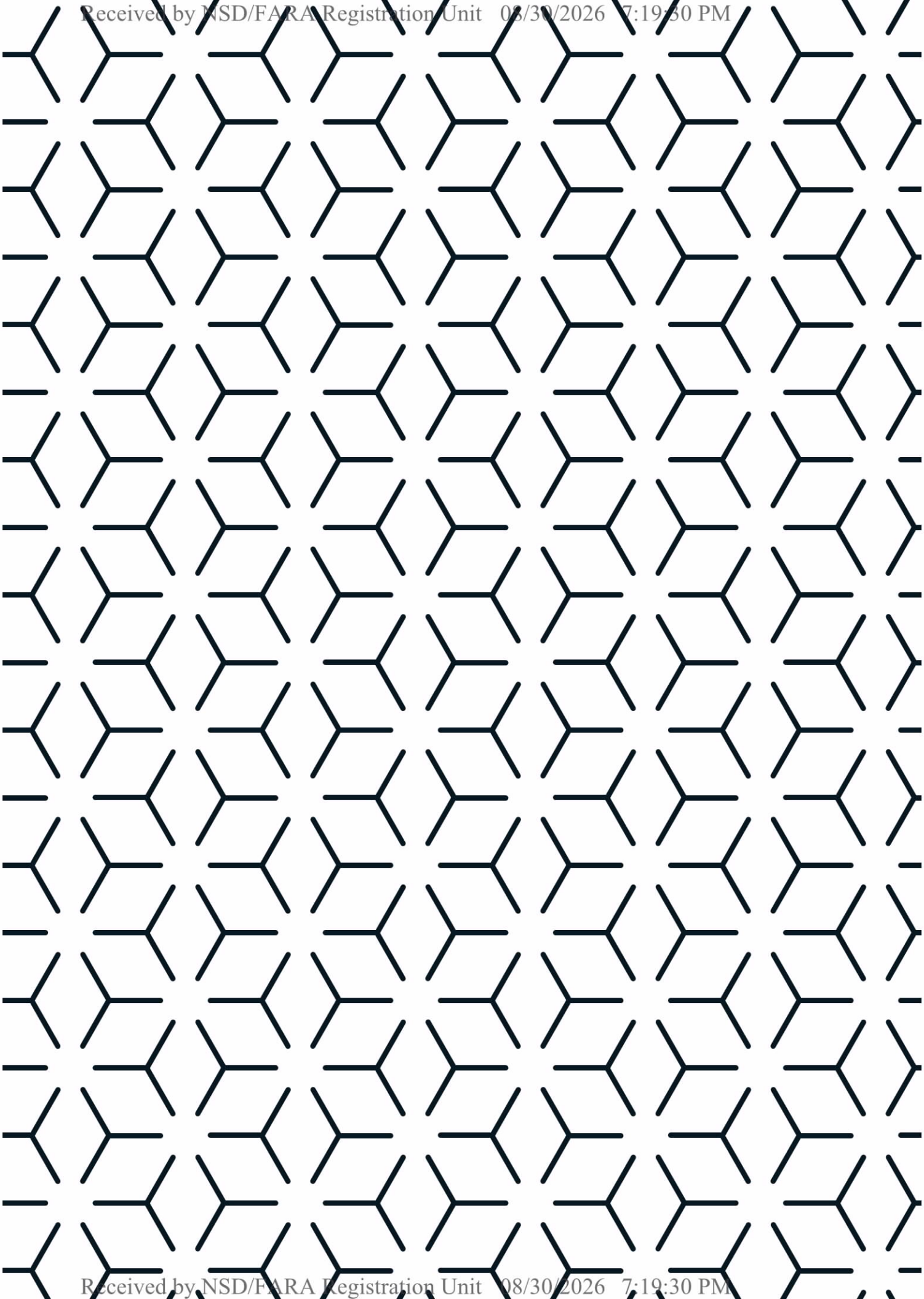
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approaches to risk management will determine whether the Baltic remains a space of stability and integration or becomes one of the main theatres of confrontation in an increasingly competitive and unpredictable international order.

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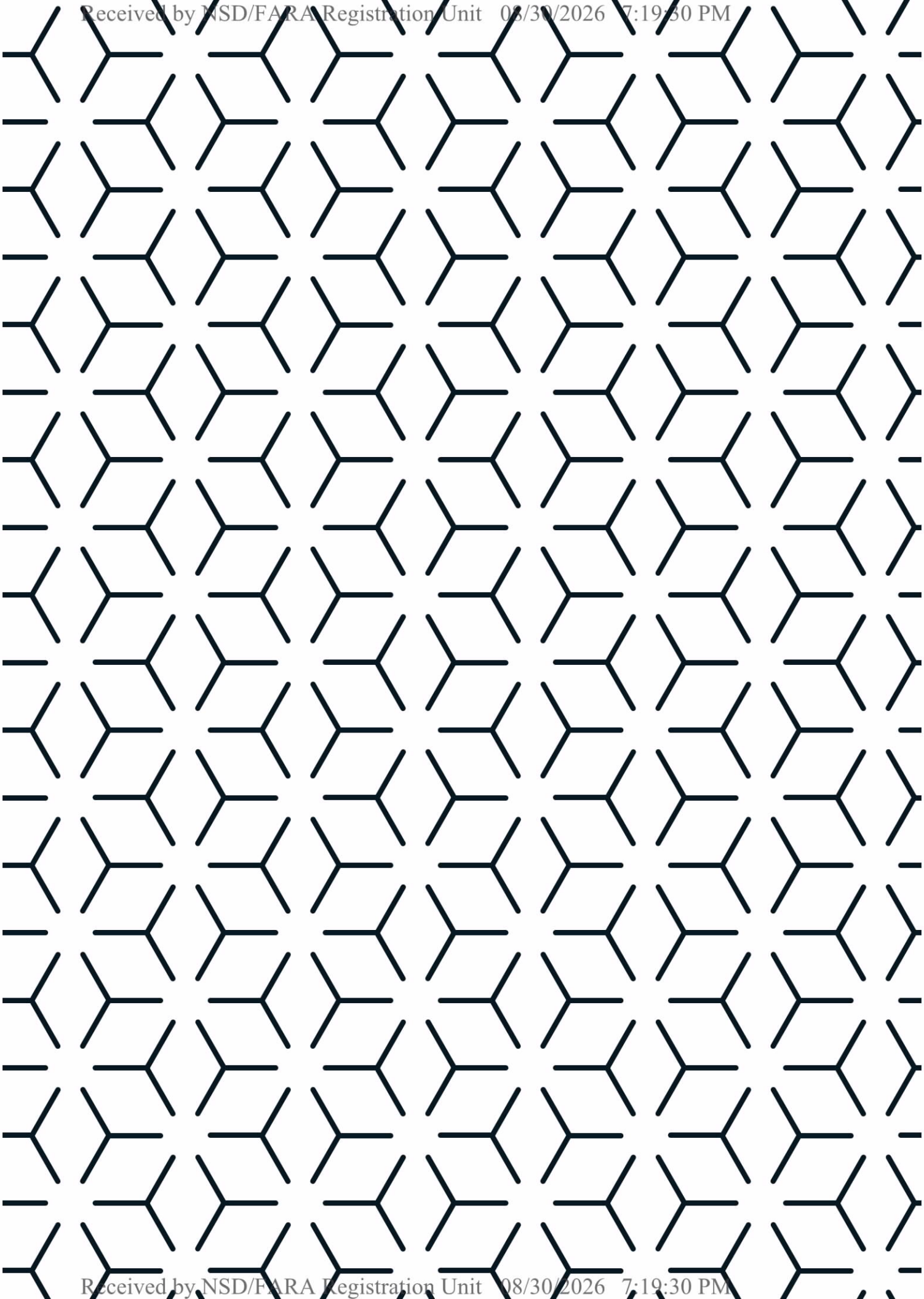


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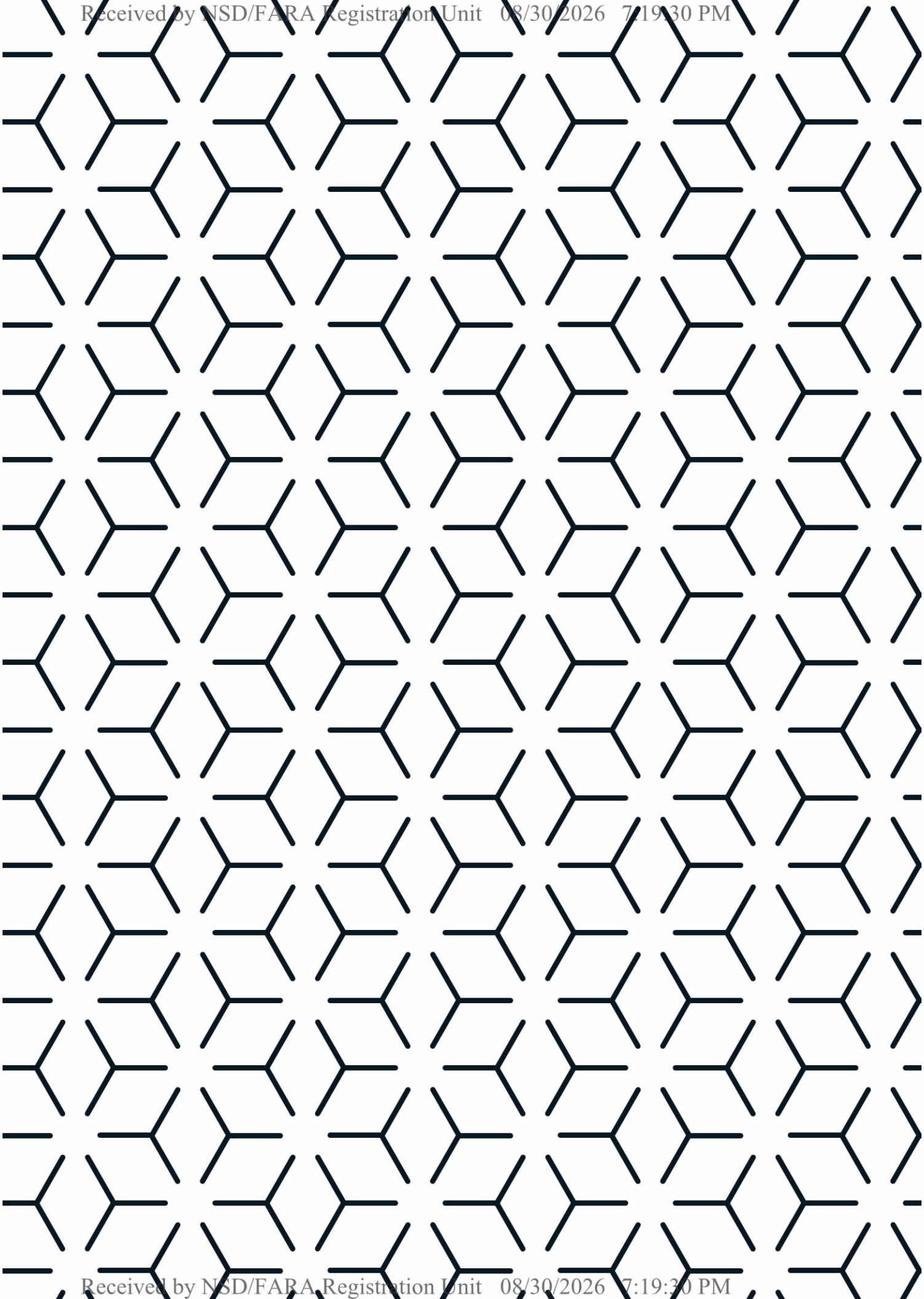
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