

MONITOR

SECURITY

Baltic and Northern Defence – Towards an Integrated Maritime Strategy

Navigating the Future of European Security

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- › The Baltic Sea region, the High North and the Arctic, as well as the adjacent waters including the North Atlantic, should be seen as an integrated wider northern theatre.
- › European allies should build on initiatives already under way to create and implement a coherent, integrated and sustainable maritime strategy. This will be vital to providing a credible deterrence and defence posture.
- › This maritime strategy should be based on a joint vision, aligned priorities, a division of labour amongst allies, reflecting areas of expertise and capability, and facilitate greater collaboration in procurements and operations contributing to enhanced European naval capability and improved naval self-reliance.
- › It should be informed by the lessons of the conflicts in Ukraine and Iran, enabling enhanced European naval burden-sharing to support European interests at home and further afield.

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Introduction

Europe faces growing maritime challenges. Russia poses an increasingly direct threat across the Baltic Sea region, the High North, the Arctic and the North Atlantic as well as in the Black Sea region, while the United States expects European allies to assume greater responsibility for the continent's defence. At the same time, Russia's ongoing illegal war of aggression against Ukraine, its hybrid warfare against EU and NATO members in Europe and the war in the Middle East have exposed European shortfalls in naval capacity, readiness and resilience.

The Baltic Sea region, the High North, the Arctic and adjacent waters including the northeastern Atlantic should be viewed as an integrated wider northern theatre. As Europe seeks to strengthen deterrence and defence in this region, the central question is how European navies can organise their growing capabilities into a more effective collective force, aligning efforts and force postures. Doing so, will be critical to Europe's ability to deter Russia, defend the wider theatre and assume a greater share of responsibility for its own security while making the most effective use of finite resources.

After a period of benign neglect, European NATO and European Union members are reinvesting in naval power. The main driver for the recapitalisation – which comes amid Europe's broader refocusing on defence and security – is not only a new sense of urgency that Russia poses a direct military threat to European security. At the same time, the lessons from the accelerating pace of change on the Ukraine battlefield are testing Europe's ability to keep up with the evolution of military technology even as it seeks to assume a greater share of its own defence burden. Meanwhile, the Iran war, and its repercussions around the Middle East and beyond, have posed yet more questions about Europe's readiness for high-intensity warfare. This has particular resonance in the naval domain, given the blockage of the Strait of Hormuz and its impact on the global economy. Further, this interrelationship of regional security interests raises concerns over European allies' ability to balance the urgent need to address their naval priorities closer to home with the requirement to defend their interests further afield.

Finally, the United States expects a new 'burden shifting' arrangement where European allies assume primary responsibility for security on the continent. This includes a reduction in its contribution as a traditional provider of key naval capabilities such as aircraft carrier strike groups (CSGs), nuclear-powered attack submarines (SSNs) and undersea sensor nets for anti-submarine warfare (ASW), as well as naval air and missile defence.

Against this background, European allies must accelerate efforts to develop and implement a coherent and sustainable maritime strategy, with the wider northern theatre serving as a centre of gravity for Euro-Atlantic defence. This will require aligning priorities and leadership roles, maximising cooperative capability developments, sharing burdens more effectively on key tasks and developing a clearer division of labour among allies, to deliver increased overall capacity. It also involves sharing burdens further afield, including with NATO members on the southern flank and beyond the traditional NATO area in the context of wider coalition efforts.

Russia's Threat and Europe's Challenge

In October 2025, NATO unveiled a maritime strategy that was significantly more robust than its 2011 predecessor. It reflects the Alliance's new warfighting mindset and emphasises the naval role in connecting and sustaining NATO's deterrence and defence capabilities, including protecting sea lines of communication and critical undersea infrastructure (CUI).

NATO's new maritime strategy echoes the Alliance's strategic concept, stating that Russia is 'the most significant, direct and long-term threat' to Europe's security. Russia represents an increasingly complex threat to NATO and the EU across the Baltic, High North and Arctic down the Eastern Flank to the Black Sea.

Indeed, the Kremlin has long viewed this region as a single interconnected theatre. In conjunction with its military integration with Belarus, Russia poses a direct threat to the Baltic states. Moscow is also using the Baltic Sea region as a front-line for its increasingly assertive testing and probing of NATO and EU resolve and resilience through employment of hybrid tactics. This includes the use of its shadow fleet of sanctions-evading merchant ships.

Further north, the Arctic is a critical region for Russia. Its rich energy and other resource deposits have made it even more significant for Russia's economy and its perception of itself as a great power. Moscow has made clear its ambitions to exert greater influence and control over the Northern Sea Route as melting sea ice makes Arctic waters increasingly navigable.

Consequently, Russia has looked to boost its Arctic military capabilities. Some of these have been depleted by the Ukraine war, but its nuclear and naval forces in the region remain essentially intact and therefore of heightened strategic significance, and the Kremlin continues to invest heavily in them. In 2024 and 2025, three of the five new submarines commissioned into the Russian Navy – including one of its most advanced nuclear-powered guided-missile submarines – were assigned to the Northern Fleet. It remains the Russian Navy's most powerful formation and will continue to be so into the 2030s (see table).

Moreover, Russian submarine and other naval activity threatening NATO and EU critical undersea infrastructure in the Atlantic is also on the rise; up by a third, for instance, in the waters around the United Kingdom in the last two years. Moscow is also seeking to exploit weaknesses and discord in the High North and the Arctic, for example around Norway's Svalbard archipelago.

In addition, China's increasing economic and scientific presence and activities in the High North and Arctic have dual-use implications. Given China's strategic partnership with Russia, these activities are a further challenge to Euro-Atlantic security, reflecting also how European concerns over neighbourhood security are intertwined with other regions.

Command and Coordinate

NATO has responded to Russia's growing challenge in the North by strengthening its command structure and deepening regional integration. The accession of Finland and Sweden has transformed the strategic geography of northern Europe, linking the Baltic Sea, the High North, the Arctic and the North Atlantic more closely than ever before. Both countries have a direct stake in Arctic and northern security, while NATO's increasing emphasis on reinforcement and sustainment, reflected in the maritime strategy, has sharpened attention to the North Sea, the northeastern Atlantic as well as the sea lanes beyond as essential enabling areas.

To support this shift, the Alliance has adapted its command arrangements. In late 2025, responsibility for Denmark, Finland and Sweden was assigned to the Joint Forces Command (JFC) Norfolk, alongside Iceland, Norway and the UK, bringing much of the northern theatre under a single command focused on the Atlantic, Arctic and High North. This JFC, together with the one in Naples, are currently US-led but will transition to European-led command in line with JFC Brunssum (which is focused on the eastern front and responsible for the Baltic states and Germany amongst others).

Additionally, at the operational component command level, the current UK-led NATO Maritime Command will be transferred to a US lead, as is the case currently with both the land and air commands. Together, these moves promise a greater European share of responsibility across the top-tier commands while at the same time helping to cement the US force commitments across the operational component commands.

New initiatives also include the German-instigated Commander Task Force (CTF) Baltic and the Northern Navies Initiative unveiled by the UK under the umbrella of the ten-nation Joint Expeditionary Force (JEF). These aim to improve command capacity and coordinated naval combat capability in the Baltic and the wider northern waters, to deliver both sea control and domain awareness.

These changes provide a stronger framework for cooperation but do not erase differing national priorities. Finland remains primarily focused on the Baltic Sea region and its border with Russia. Sweden's naval ambitions point to a wider role extending into the High North, while Norway continues to prioritise the North Atlantic and Arctic, alongside its emerging role as a reinforcement hub for Finland, Sweden and the Baltic states. Denmark occupies a similarly pivotal position and dual focus, overseeing access to the Baltic while maintaining significant responsibilities in Greenland and the Arctic.

The greater integration at the command level should be matched by a clearer division of labour among allies. By concentrating on areas of comparative advantage and developing bilateral and multinational capability partnerships, European states can strengthen burden-sharing and build a more coherent maritime posture by specialisation. Such an approach could help address capability gaps that may be left by an American drawdown in areas such as carrier strike and open-ocean anti-submarine warfare while, paradoxically, reinforcing the transatlantic relationship by demonstrating a greater European contribution to collective defence.

Pulling Together and Sharing the Burden

A sustainable northern defence strategy that underpins the Alliance’s overall maritime strategy will depend on Europe’s ability to link forward defence in the Baltic Sea region with maritime control, resilience and strategic depth across the Nordic states, the High North, the Arctic and the Atlantic. A stronger integration of existing bilateral, minilateral and regional defence initiatives will help to maximise available resources.

The following table provides an overview of the principal naval forces expected to be available to the Baltic and northern NATO allies by 2035, measured against Russia’s Baltic and Northern Fleets:

Estimated key naval forces of Baltic and northern NATO members and Russia’s Baltic and Northern Fleets, 2035 (Net change from 2026)

| | Submarines | Principal Surface Combatants | Corvettes | Patrol Ships and Craft | Mine Warfare Vessels |
|----------------------------------|----------------|------------------------------|----------------|------------------------|----------------------|
| Finland | 0 | 4 (+4) | 0 | 4 | 6 (-2) |
| Sweden | 5 (+1) | 4 (+4) | 5 | 2 (-2) | 7 |
| Norway | 6 | 6 (+2) | 0 | 8 (+1) | 3 (-1) |
| Denmark | 0 | 5 | 0 | 11 (-1) | 4 |
| Germany | 7 (+1) | 12 (+1) | 7 (+2) | 0 | 10 (-2) |
| Poland | 2 (+1) | 3 (+1) | 0 (-1) | 4 | 19 (-2) |
| Estonia | 0 | 0 | 0 | 3 (+2) | 3 (-1) |
| Latvia | 0 | 0 | 0 | 0 | 3 (-1) |
| Lithuania | 0 | 0 | 0 | 4 | 3 |
| TOTAL | 20 (+3) | 34 (+12) | 12 (+1) | 36 (±0) | 58 (-9) |
| Russia (Baltic & Northern Fleet) | 26 (-1) | 15 (-1) | 10 (-8) | 4 (-7) | 17 (-5) |

Source: IISS analysis, Military Balance+, milbalplus.iiss.org.

Note: Based on IISS vessel classifications and excluding coast guards. Russian 2026 active force levels are assigned according to actual stationing rather than nominal fleet affiliation. Figures in parentheses show net change from 2026 to 2035, accounting for both new construction and vessel retirements.

It demonstrates that the challenge for NATO is not simply one of force generation, but increasingly one of coordination, integration and the effective distribution of roles and responsibilities. While the naval capabilities of the Baltic and Nordic allies will provide an increasingly important foundation over the coming decade, the strategy will also require the enabling and supporting capabilities of neighbouring allies with a direct stake in the region, as well as other allies.

A central requirement for sustaining forward defence on NATO's eastern flank will be the establishment of wider sea control in the Baltic Sea. Here, Germany, Poland and Sweden are well positioned to assume a leading role, with Commander Task Force Baltic providing a framework for operational coordination. Germany's naval expansion plans, which include new high-end surface combatants, additional submarines, intelligence ships and a growing portfolio of uncrewed systems, will significantly strengthen its position as a regional maritime leader. At the same time, Germany will face important choices about how to balance its growing responsibilities in the Baltic with its maritime ambitions in the North Sea and High North – not to mention other regions.

Poland is emerging as a more capable maritime actor. The acquisition of new frigates under the *Miecznik* programme, together with new intelligence vessels and a close cooperation with Sweden on future submarine capabilities, will substantially improve the Polish Navy's ability to conduct anti-submarine warfare, protect critical undersea infrastructure and contribute to maritime surveillance. These investments address longstanding national weaknesses and should allow Poland to assume a greater share of regional maritime security tasks, reducing the burden on Germany.

Sweden is also strengthening its position. Alongside the expansion and modernisation of its submarine fleet, the Swedish Navy is upgrading its *Visby*-class corvettes and investing in advanced anti-submarine warfare, air-defence and maritime surveillance capabilities. Most notably, four future frigates, which were announced in May 2026 and with a French design, will be the first larger surface combatants operated by Sweden since the 1980s. Similarly, Finland is enhancing its naval capabilities through the Squadron 2020 programme, which will introduce a new class of frigates, giving the Finnish Navy new operational options besides its traditional focus on anti-surface and mine warfare.

The three Baltic states will remain primarily focused on landward forward defence and the development of the Baltic Defence Line. However, they are preparing to make important contributions in coastal and littoral defence through investments in coastal anti-ship missile systems and mine countermeasures. The acquisition of capabilities such as the Naval Strike Missile, alongside the modernisation of existing naval assets and the introduction of uncrewed underwater vehicles, will strengthen their ability to secure coastal waters and address the growing mine warfare challenge. These efforts represent a valuable specialist contribution to NATO's collective maritime defence posture.

From Burden-Sharing to Force Integration

A key piece of the puzzle is to align national maritime visions and move towards greater force integration among European navies. For instance, the UK Royal Navy's (RN's) vision for the maritime defence of the northeastern Atlantic and northwestern Europe is the 'Atlantic Bastion' anti-submarine warfare concept that will be a hybrid mix of traditional crewed platforms and uncrewed and autonomous platforms and systems. Coupled with this will be 'Atlantic Shield' – the RN's future contribution to UK and northern European integrated air and missile defence, which will again be a hybrid mix. Finally, there will be 'Atlantic Strike', involving a hybrid aircraft-carrier strike capability and a transformed amphibious force.

The Royal Navy is currently at a low ebb, with two aircraft carriers, 11 active destroyers and frigates and 5 active SSNs. By 2035, that should have grown again to two carriers, around 16 destroyers and frigates and 7 SSNs, plus potentially an increasing number of uncrewed vessels and new amphibious ships. Concentrating on delivering a fully-fledged carrier strike and amphibious capability and prioritising SSN capacity will support a wider northern theatre strategy with enhanced naval strike,

manoeuvre and open-ocean ASW capabilities. These could be further enhanced by improving coordinated European carrier operations, particularly bringing in France and Italy.

Germany could provide a bridge capability to support multiple European carrier operations with its high-end surface combatants, potentially reinforcing a tripartite naval tie-up with the UK and France for integrated CSG (Carrier Strike Group) operations – fusing, perhaps, the bilateral UK-France Lancaster House agreement and the UK-Germany Trinity House deal to deliver enhanced naval capacity. A further contribution to reinforcement capability in the wider northern theatre could come from renewed UK–Netherlands cooperation on amphibious shipping and joint operations. All these plans, though, depend on the ability of the UK to finance and deliver its planned naval acquisitions and modernisations and particularly to make good on its ambitions to generate a credible hybrid carrier strike capability.

Norway has entered into essentially a naval alliance with the UK as part of their new bilateral Lunna House defence pact to purchase and jointly operate almost identical UK-designed Type-26 ASW frigates. If this arrangement comes fully to fruition, it could lead to an integrated and in effect interchangeable force of up to 14 advanced ASW frigates for operations in the Atlantic Ocean and the North and Norwegian Seas.

Canada also plans to build up to 15 similar vessels based on the UK Type-26 hull, which would add further to a more homogeneous and capable open-ocean escort force. In the longer term, Canada also intends a major submarine upgrade, possibly with a conventionally powered design shared with Germany and Norway. The German-Norwegian submarine project alone will produce 12 advanced submarines. Operated alongside the UK's and France's SSNs, these boats could take on niche undersea tasks like surveillance, shallow-water operations and special forces insertion, freeing SSNs for open-ocean operations against the Russian nuclear-powered fleet.

Denmark's naval expansion plans include an increased focus on critical undersea infrastructure protection and, in the longer term, new frigates and additional new-generation Arctic patrol vessels. NATO's new *Arctic Sentry* mission, announced in February 2026 and building on the earlier *Baltic Sentry* activity, will enhance the co-ordination of Alliance operations and presence in the High North.

Stronger northern European capabilities in carrier strike, littoral manoeuvre, integrated air and missile defence and anti-submarine warfare would also provide a foundation for other NATO members with relevant naval forces, such as Italy, Spain and Türkiye, to integrate when needed. They would also give Europe more credible options on the southern flank without having to rely on the US Navy. Recent events have shown that burden-sharing demands can extend beyond Europe if a more distant crisis erupts. But in a major NATO crisis, little naval capacity would be available for any other contingency.

The closure of the Strait of Hormuz, coming after the Houthi anti-shipping campaign in the southern Red Sea and the Bab el-Mandeb Strait, indicated that European navies are short of the kinds of ships and capabilities for the complex threats they could face in such contested and constricted waterways. Some are also hard-pressed to sustain both NATO commitments and wider defence requirements. In one example of 'dynamic burden-sharing', Germany stepped in with a frigate as flagship for a NATO naval group and host for the British command staff when the UK destroyer earmarked for the role was diverted to the Middle East.

It also showed that, in the longer term, European powers may be called upon to deliver more missions like the 'coalition of the willing' reassurance operation that has been mooted for the Strait of

Hormuz. Concerted planning and preparation for such a contingency, either within a European NATO or EU-plus-UK framework, will be needed to deliver the capability and balance priority requirements both at home and out of the area. One option may be the JEF (Joint Expeditionary Force), which started life as a UK-led idea for a rapid-response multinational expeditionary force.

Conclusion

The Baltic Sea, the High North, the Arctic and the northeastern Atlantic are best understood as a single interconnected theatre for European defence and security. Russia already approaches the region in these terms, combining conventional military power, nuclear deterrence, maritime activity and hybrid operations across the area. At the same time, the wars in Ukraine and across the Middle East have exposed critical European shortfalls in readiness, sustainment, maritime capacity and advanced capabilities, while underlining the growing expectation that Europe should assume a greater share of the burden for its own security both regional and global.

The accession of Finland and Sweden to NATO has created a major opportunity to strengthen collective defence across the North. New command arrangements, growing Nordic-Baltic cooperation and deeper bilateral defence relationships provide the foundations for a more coherent maritime posture.

The central challenge, however, is not simply to generate more forces. It is to organise European naval power more effectively. Sustained investment remains essential, but so too do smarter burden-sharing, effective division of labour and closer integration of planning, logistics, capability development and procurement. The goal should be to turn a growing collection of national capabilities and regional initiatives into a genuinely integrated maritime strategy, one that is capable of delivering collective defence in the North while providing Europe with greater resilience, capacity and strategic self-reliance.

Imprint

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This paper has been prepared for the Kiel Security Conference 2026.

Published by: Konrad-Adenauer-Stiftung e. V.
Design and typesetting: yellow too Pasiek & Horntrich GbR

This publication was published with financial support of the Federal Republic of Germany.

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