

MONITOR

SECURITY

The Baltic, High North and the Indo-Pacific

Common Connections and Shared Concerns

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- › Russia's war of aggression against Ukraine and wider geopolitical developments highlight the growing connection between Euro-Atlantic and Indo-Pacific defence and security concerns. The opening of the Arctic and the High North through melting sea ice will also bring the two regions closer together strategically. These links present opportunities but also prioritisation challenges for Baltic and northern European states.
- › Critical undersea infrastructure (CUI) vulnerabilities, hybrid warfare challenges at sea and cyber security concerns are key areas of common interest for Baltic, northern European states and their Indo-Pacific partners, providing opportunities for further cooperation.
- › Other areas of common interest and potential increased co-operation include civilian and industrial resilience, shared maritime domain awareness, maritime economic protection, and the safeguarding of congested waterways, ports and offshore maritime economic infrastructure.
- › Defence procurement relationships between the two regions are deepening, leading to greater defence business opportunities in new and traditional domains, potentially including joint capability development.

Table of Contents

Introduction.....	2
Common connections.....	3
Cooperation beneath the surface.....	4
Building a common maritime picture	5
Keeping deployments afloat.....	6
Defence industry cooperation.....	7
Conclusion.....	8
Imprint.....	9

Introduction

European and Indo-Pacific security is increasingly closely connected. This is partly driven by the global effects of Russia's war of aggression against Ukraine, China's more indirect and North Korea's direct military support for Moscow's military campaign against Kyiv. Other cross-regional concerns include the stability of the international rules-based order, economic security and threats ranging from hybrid warfare to strategic (including nuclear) deterrence. Moreover, there are shared security concerns in the new competitive domains of cyber and space and over globalised transnational crises such as climate change.

Maritime security is a critical area of common concern, specifically the threats to critical undersea infrastructure such as seabed communications cables. There is also a growing focus in both regions on hybrid or 'grey zone' warfare at sea, including the use of 'shadow fleets' of chiefly ageing oil tankers by Russia, Iran and North Korea. These operate on the margins of the global shipping industry in an attempt to circumvent international sanctions imposed on Russia.

The Baltic Sea is a relatively confined and restricted waterway compared to most of the Indo-Pacific. But, like the Baltic Sea, the Indo-Pacific contains congested and contested waters, with common challenges of upholding freedom of navigation and the provisions of the UN Convention on the Law of the Sea. Although the Baltic Sea has recently been referred to as a 'NATO lake', there are still significant challenges in maintaining it as a safe and secure maritime thoroughfare. These common concerns could drive deeper inter-regional military co-operation, joint capability development and improved defence industrial capacity.

Russia's war against Ukraine has also heightened perceptions, particularly among states in or around the Arctic Circle, that the Arctic and the High North are associated regions of increased strategic risk. This has been reinforced by the effects of global warming and the melting of Arctic sea ice, raising the prospect that transpolar sea ways will become navigable more routinely.

The character of these common threats means that all the various players in the Baltic region have a role to play in increasing inter-regional cooperation and capability development. This includes the littoral Baltic states, even if they – like their northern European neighbours and other major European powers – have different levels of ambition and capacity to project power beyond their immediate neighbourhood. Areas of inter-regional cooperation and capability development could include cyber security, industrial cooperation in emerging defence technology areas, improving societal resilience, and cooperation with the Indo-Pacific both bilaterally and as part of NATO and European efforts. Lithuania, for instance, is the latest European country to publicise Indo-Pacific ambitions, having published Indo-Pacific guidelines in 2023 and an Indo-Pacific defence strategy in 2025.

Smaller states could also assume more of the burden of maritime security in and around the Baltic Sea, especially in overall domain awareness and niche areas like mine countermeasures (MCM). This could free up resources for those neighbouring states trying to balance growing defence demands at home with an ambition to deepen defence engagement in the Indo-Pacific.

Common connections

NATO's European members face the need to assume a greater share of the burden for Europe's defence. Concerns already evident after Russia's invasion of Ukraine in 2022 have been sharpened significantly by the advent of the second Trump administration. Across the continent, states are looking to rebuild their military readiness, fill capability gaps, increase overall security resilience and enhance defence industrial capacity.

Not surprisingly, there has been a heightened focus on security and defence in Europe itself. The states of the Baltic Sea region including Denmark, Finland and Sweden, and the major players Germany and Poland, remain amongst the most exposed, along with their key northern European neighbours such as Norway and the Netherlands.

At the same time, geostrategic and geoeconomic developments have highlighted the growing connection between defence and security threats in the Euro-Atlantic and Indo-Pacific. Like-minded states in both regions also face the shared challenge of how to manage defence relations with the US administration, how to gauge Washington's dependability as a security guarantor, and how to read the administration's mixed messages on how much Europe should focus on its own backyard rather than the Indo-Pacific, and perhaps vice-versa.

While the 2024 NATO summit declaration maintained that Russia remained the most significant and direct threat to Allies' security, it also highlighted China's 'stated ambitions and coercive policies' as challenging Allied interests, security and values. Furthermore, it described Beijing as 'a decisive enabler' of Russia's war efforts, and their 'no-limits' relationship as of profound concern.

The fuelling of Russia's war effort by Iran and North Korea – including Pyongyang's direct involvement as a fighting ally and armourer of Moscow – is seriously affecting Euro-Atlantic security. The increasing convergence of these powers in an adversarial grouping is a growing factor in the defence and security calculations of likeminded states in both the Euro-Atlantic and Indo-Pacific arenas.

This helps to explain the increasing attention that NATO is paying to its partnerships with key Indo-Pacific players, especially Australia, Japan, South Korea and New Zealand (the 'AP4'). This trend is set to continue at the upcoming summit in The Hague in June 2025.

Similarly, the EU has been increasing its engagement in the Indo-Pacific. In 2021, the EU Indo-Pacific strategy highlighted the importance of a 'meaningful' European naval presence in the region and said the EU would explore ways to ensure enhanced naval deployments, an ambition underlined in the 2022 EU Strategic Compass.

Cooperation beneath the surface

A central concern in both regions is the growing threat to critical undersea infrastructure (CUI). Suspicious incidents have occurred in both regions, but the waters in and around the Baltic Sea have been particularly affected. Hence there is global attention on how the Baltic states and their neighbours are tackling the issue. Their responses have global relevance as test cases for delivering an effective counter-strategy.

The September 2022 attacks on the Nord Stream gas pipelines in the Baltic Sea were the most prominent incidents. They shone a spotlight on the shortfalls of states' ability to monitor and counter covert threats against such infrastructure. There have been other incidents in and around the Baltic Sea, but also in the Indo-Pacific. The most significant incidents, attributed to human activity, included:

- › January 2022, damage to communications cable connecting Svalbard to mainland Norway
- › October 2022, damage to SHEFA-2 submarine fibre-optic cable connecting the Faroe and Shetland islands and Scotland
- › February 2023, damage to a cable near Taiwan's Matsu Island
- › October 2023, damage to the Balticconnector gas pipeline between Estonia and Finland
- › November 2024, BCS East-West Interlink and C-Lion 1 cables in the Baltic disrupted
- › December 2024, damage to the Estlink cable between Estonia and Finland
- › February 2025, communication cable cut near Taiwan's Penghu Island

Two of the incidents in European waters appeared to involve vessels with Chinese associations – the small container ship *Newnew Polar Bear* in the case of the Balticconnector, and the cargo ship *Yi Peng 3* in the BCS East-West Interlink and C-Lion 1 situation.

However, while all these damages are believed to have been man-made, it has been difficult to identify what or who caused the damage and whether it was deliberate or accidental, particularly when ships have dragged their anchors along the seabed.

These issues underscore the global nature of the problem, but they also highlight the opportunity for shared responses.

Since 2022, NATO and Alliance member states in and around the Baltic have made considerable strides in improving monitoring and surveillance to guard against hybrid maritime activity and threats to CUI, culminating in NATO's *Baltic Sentry* patrol mission. At the same time, new capabilities have been introduced, such as uncrewed underwater vehicles, to help with sub-surface and seabed surveillance and protection. As well as increased co-operation between militaries and other government agencies, an additional challenge is the requirement for increased cooperation with the commercial-sector and industry, which owns and operates much of the undersea infrastructure and the critical undersea technology to monitor and safeguard it.

Sharing information on experiences and best practice, along with the prospects for further capability development, is an important opportunity to boost co-operation between Europe and the Indo-Pacific, and it provides the states in and around the Baltic with the option to play an important role.

Sharing assessments on challenges and threats, procedures and tactics is also important. Europe has the advantage of established frameworks for co-operation, such as in a NATO and EU context. But the Indo-Pacific region also has elements of maritime security cooperation on which it can build, like the Malacca Strait counter-piracy patrols. The Association of Southeast Asian Nations (ASEAN) is also undertaking work to improve its approach to undersea cable security.

Building a common maritime picture

Increased monitoring and patrolling activities undertaken in and around the Baltic also have wider maritime security benefits. They have helped in tackling the associated issue of countering Russia's shadow fleet, a significant portion of which transit the Baltic Sea. Not only do Russia's shadow tankers operate in both regions, but Iran and North Korea adopt similar approaches to evading sanctions. And China is a beneficiary of shadowy oil imports as a result.

Indeed, the experiences of the Baltic and other north European states in dealing with the range of Russian hybrid actions at sea, as well as the specific challenge of CUI monitoring and protection, means that they have much to offer in the way of lessons learned.

For their part, Indo-Pacific states can also bring the perspective of hybrid or grey zone maritime challenges in their region, particularly by China's coercive use of its multiple maritime agencies, including its navy, coast guard, maritime militia and even government-directed fishing fleets. A case in point has been the regional reaction to the increasingly coercive and sustained grey zone campaign Beijing has adopted in its maritime disputes with the Philippines. This has led, among other things, to increased regional coast-guard cooperation. In some respects, the Indo-Pacific may be the pacing arena for developing more comprehensive strategies to counter such hybrid competition, including more integrated operations between navies and coastguards.

Moreover, given the challenges of attribution in the grey zone, the difficulties of responding and calibrating credible deterrence, and the problems of operating within a complex and contested legal framework, there is a strong argument for increased information-sharing and dialogue between the regions. These could focus on seeking to establish agreed norms and guiding principles.

As for the challenges in the Arctic and High North, these in part reflect increased Russian strategic reliance on the region, as well as Moscow's increased assertiveness. However, there is also an increased Russian perception of vulnerability, not least because of the accession of Finland and Sweden to NATO. There is also now a heightened perception that the Baltic Sea, the Arctic and High North, as well as the north-eastern Atlantic are an integrated theatre of deterrence and defence operations because of the ranges of modern deep strike weapons. This requires a more integrated set of response options covering the whole of this northern arena.

Adding to the strategic picture is the increased interest and presence of China, having proclaimed itself a 'near-Arctic state'. Growing concerns exist about how the Arctic and the High North fit into Beijing and Moscow's 'no limits' relationship. Debate continues over how quickly and to what extent climate change will result in an economically viable and reliable commercial sea route. However, not only does Beijing's defence and security stake – and presence – in the Arctic seem set to grow, but the region is likely to become the conduit by which China enhances its naval presence in the Euro-Atlantic area, while also being increasingly important to Moscow's ambitions to project power into the Indo-Pacific.

Therefore, an enhanced dialogue on Arctic stability between Europe and likeminded Indo-Pacific nations is needed. Inter-regional dialogue would also help a broader range of shared maritime concerns. There is an almost universal requirement for increased maritime domain awareness, including information- and data-sharing. This could also extend to shared capability developments in space and uncrewed platforms for intelligence, surveillance and reconnaissance and persistent situational awareness.

Both northern Europe and the Indo-Pacific also play host to key maritime hubs in the shape of major port facilities. Protecting these is of growing concern and complexity. The Baltic Sea and the western Pacific, the Taiwan Strait and the Strait of Malacca are all congested waterways. There are also global lessons to be drawn from recent threats to maritime commerce such as the Houthis anti-shipping campaign in and around the southern Red Sea, certainly for naval forces but also for the private sector, and in relation to coordination between both.

Keeping deployments afloat

Europe's growing awareness of its stake in Indo-Pacific security is reflected by the increased tempo and scope of defence deployments to the region, most notably of naval forces. Germany's modest single-ship deployment in 2021–22 was followed by a more ambitious two-ship foray in 2024, including a transit through the Taiwan Strait. The Netherlands has instituted a drumbeat of periodic warship deployments, including as part of the United Kingdom's carrier strike group (CSG) mission in 2021 led by *HMS Queen Elizabeth*.

Beginning in 2024, there has been a succession of European aircraft carrier deployments to the Pacific, starting with the Italian Navy's *Cavour* and followed by a French Navy group led by the nuclear-powered carrier *Charles de Gaulle*. As of mid-2025, the UK is undertaking another CSG deployment with its second carrier, *HMS Prince of Wales*, and it is a token of Norway's perspective on the Indo-Pacific that it is contributing two naval vessels – a frigate and a support ship – to the group.

Beyond the stakes in the region that this implies, navies can learn from each other on the common challenges of complex naval warfighting. European deployments are also given greater

credibility by the participation of regional navies, and the support of regional states in respect of basing, maintenance and supply. And European carrier-based naval groups provide an alternative convening opportunity for smaller navies not necessarily always wishing to exercise with US forces.

For their part, the naval forces of the Baltic states are essentially designed for littoral operations, with only limited ability to range beyond the Baltic Sea. But that does not mean they could not play a part, not least because of their experience in dealing with hybrid activities as well as in congested waterways.

The pressure on European states to more quickly fill their military capability gaps adds to the resource and prioritisation challenges for those seeking to maintain or enhance their presence and influence in the Indo-Pacific. Even with the promise of increased funding, it will remain difficult to make it all add up.

This makes a division of labour between European states an attractive option. The UK is finding it difficult to deliver on its ambitions to remain a leading NATO player, back up its declaratory ambitions to do more in the Arctic and the High North, and maintain presence and influence in the Middle East and the Indo-Pacific. Likewise, countries like Germany, the Netherlands and Norway are stretched thin by their desire to focus on bolstering capabilities close to home and deploy at least periodically to the Indo-Pacific.

There is already quite a degree of role-specialisation among Baltic Sea states, and various mechanisms for cooperation. But there could be more integrated burden-sharing among the northern European states on maritime security tasking within the region. This would potentially free up greater resources for those nations willing and able to undertake power projection missions, such as maritime trade protection tasks in the Middle East or deployments further afield in the Indo-Pacific. This would also enable greater coherence within NATO and in terms of the EU's ambitions to play a greater security role within Europe and beyond.

Defence industry cooperation

The growing European interest in strengthening defence industrial ties has prompted European defence companies to increase their activities in the Indo-Pacific. This has included naval sector firms that have seen success in exporting complex warship and patrol-vessel designs and submarines.

In the shadow of the Russian war of aggression against Ukraine, and the demand both for urgent operational upgrades and innovation, and common threats in both regions, cross-regional defence industrial ties will only increase. And again, smaller states should be able to benefit from the technological revolution, where some have developed key capabilities. For instance, Lithuania may be taking a lead by creating 'green corridors' to encourage inward investment, prioritising areas where Lithuania's specialised capabilities – such as cyber defence and hybrid-threat resilience – can have the greatest impact.

Partners in the Indo-Pacific can bring their own experiences and their particular know-how in certain capability and technology areas. Cross-regional cooperation on defence industrial development more generally is potentially a significant way forward. Vanguard projects like the Global Combat Air Programme between Italy, Japan and the UK (and to a lesser extent the AUKUS

partnership between Australia, the UK and the US) may be only the start. The same can be said for South Korea's growing position as a defence supplier to Europe.

This could well translate to the maritime domain as well, where European shipbuilders could benefit from Asia's productivity prowess while Asia's maritime powers may increasingly look to Europe for complex warship design. The roles of smaller states in the development of emerging capabilities, such as mass uncrewed systems and cyber technology, will provide other avenues of cooperation.

Conclusion

There are growing links between the threats to stability and security in each region. Common challenges are also resonating in both, not least in maritime security, including threats to critical undersea infrastructure and other hybrid, grey zone challenges. All these areas are ripe for dialogue and potential cooperation. A more integrated, cooperative approach is also a potential support for the ambition for a more engaged and sustained European security role in the Indo-Pacific, and also perhaps a way of sustaining this amid pressure to sharpen focus on defence requirements closer to home.

Imprint

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