

#UnitedWeStand

Securing Europe from the Eastern Flank to the High North

**Strategy for the
Nordic-Baltic-Polish Group**

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Strategy for the Nordic-Baltic-Polish Group

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Introduction



Prof. Katarzyna Pisarska
Chair of the Warsaw Security Forum

Dear Friends,

For over a decade, the Warsaw Security Forum has been a platform for dialogue that does not stop at the table – it leads further into action. As 2026 marks the 13th edition of the wsf Annual Gathering, it is my greatest honour and pleasure to continue leading this effort and help shape the future of European security and transatlantic relations.

The threats we face today are, however, no less serious than when the wsf first took place. Recognising this, we held last year's wsf under an ominous theme **#DividedWeFall**, reflecting both the gravity of the situation and uncertainty we felt. It was not a prediction, but a warning, voiced at a moment when support for Ukraine was arriving too late in too small a measure – and when the United States, our indispensable ally, was beginning to ask, with increasing insistence, whether Europe was prepared to carry more of the weight of its own defence.

Yet, while many challenges remain, Europe has already proven its willingness to step up: it now finances the larger share of Ukraine's defence and has acknowledged that it needs to take greater responsibility for its own security within NATO, and – working alongside Washington rather than waiting on it – has shown that it can

mobilise resources, industry, and political will at a pace few thought possible only a year ago. Europe is no longer merely promising to step up; it is already doing so. Therefore, it is time to build a narrative that showcases what we can achieve when we act together – recognising the threats, but moving past the fear. This is precisely what we aim to convey with this year's wsf umbrella message **#UnitedWeStand**.

Strategy for the Nordic-Baltic-Polish Group

This philosophy is also visible at a regional level – in the Nordic-Baltic-Polish region of Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway, Poland and Sweden. Namely this is what the wsf2026 Report *Securing Europe from the Eastern Flank to the High North. Strategy for the Nordic-Baltic-Polish Group* addresses. It calls for transferring the common strategic alignment around recognising Russia as an existential threat into real agency and sets out a path towards achieving it.

The report, drafted by the Casimir Pulaski Foundation's analytical team with the support of a Working Group of 27 high-level Contributors, sets out a concrete, actionable agenda for the region. It begins with the political groundwork that must precede any negotiation with Russia: agreeing to common red lines and

minimum terms and securing the frontline states a standing seat in every format where Ukraine's security guarantees and a future settlement are decided. It insists that full NATO and EU membership remain the declared objective for Ukraine, with interim guarantees built in layers so they support that goal rather than quietly replacing it.

On the military side, it calls for turning the Nordic-Baltic Eight and Poland into a genuine operational framework for joint decision-making, with dedicated attention to controlling the airspace over the Suwałki Gap, operationalising Poland's accession to the Joint Expeditionary Force and establishing a North-Eastern Seaguard to protect undersea infrastructure and police the shadow fleet. It calls for closing the deterrence gap through long-range conventional strike capability, paired with a joint push for a fairer regional share in NATO's nuclear arrangements, and for building shared Baltic Sea situational awareness, concentrating protection on the offshore nodes whose loss would be most damaging.

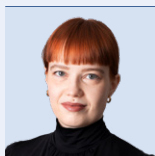
The report also looks beyond the military dimension, calling for the region to secure its critical raw materials value chain through new regional initiatives, and to reinforce existing regional structures – so that coordination among these countries evolves from ad hoc cooperation into lasting strategic influence.

Europe's future security order will not be decided by the outcome of the war in Ukraine alone. It will also be decided by whether the continent's frontline democracies can organise themselves for a long period of strategic competition. The Nordic-Baltic-Polish region holds the longest continuous stretch of Allied territory facing Russia and Belarus and should no longer be seen merely as Europe's frontline. It should be recognised as one of the principal architects of security agenda that follows the war.

We hope that this report and the discussions around it, once again, will lead further into action – for it is only by standing united that we will write the order to come, rather than simply live within it.

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The Casimir Pulaski Foundation and the Warsaw Security Forum would like to extend their gratitude and appreciation to the following individuals for their invaluable contributions during a series of meetings and for providing insightful comments on the draft. These inputs have been instrumental in shaping the discussion and refining the content, but they do not necessarily constitute an endorsement of all findings and recommendations.



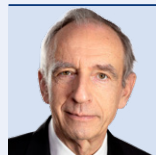
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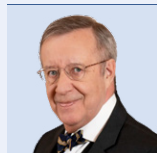
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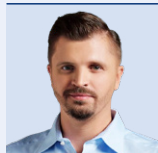
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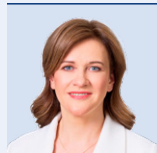
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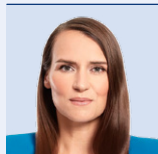
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From the Eastern Flank to the High North

The Nordic-Baltic-Polish region has ceased being regarded as Europe's periphery. It has become **one of the centres where the future of European security is being decided**. That shift runs along a single strategic axis stretching from the High North through the Baltic Sea region – an area that has for a long time been regarded as a distant edge of the continent and is now one of its principal centres of gravity.

The region this report addresses is the Nordic-Baltic-Polish group, nine states in all, sometimes called the NB8+: the five Nordic countries of Denmark, Finland, Iceland, Norway and Sweden, the three Baltic states of Estonia, Latvia and Lithuania, and Poland. Together they occupy the longest continuous stretch of NATO and European Union territory bordering Russia and Belarus.

Geography alone does not explain the region's growing weight. Over the course of Russia's war against Ukraine, these states have emerged as one of Europe's most coherent strategic communities. They have been ardent supporters of Ukraine, contributing, on average, 2.07% of their GDP to military, humanitarian and financial assistance. Moreover, the region's **common strategic alignment in recognising Russia as an existential threat** has led to its further integration, which is reflected in average defence spending of 4.07% of GDP.¹ Political differences remain, but the region shares a common reading of Europe's security environment and of what the coming decade will demand. It treats that decade as urgent. **The choices that will**

define European security for a generation are being made now, not after the Russo-Ukrainian ceasefire. The question the region faces is therefore no longer whether it can coordinate, but whether it can act.

The region's weight rests on more than exposure to the Russian threat. It forms NATO's primary northern and eastern defensive line, running from the Arctic to the eastern borders of Poland and the Baltic states. The accession of Finland in 2023 and Sweden in 2024 has since turned the Baltic Sea into a largely Allied operational space. The region is also becoming one of Europe's most important energy and defence-industrial hubs. On the energy side, the Baltic grid was synchronised with continental Europe in 2025, followed by further grid integration between countries in the region, for example the Aurora Line between northern Sweden and Finland. The region is also heavily investing in new power generation to meet the growing electricity demand. On the defence industrial side, the region's prowess and cooperation can be best observed on multinational projects – such as the involvement of Polish wB Group in the production of ammunition and components for the K239 rocket artillery procured by Norway or the involvement of the Norwegian Kongsberg in the Polish SAN anti-drone system programme. What was once a string of separate national assets is turning into an interwoven capability, connectivity and political alignment, and it is that combination, not threat exposure alone, that explains the region's rising importance.

The Nordic-Baltic-Polish Region at a Glance

Population

70 million

Land border with Russia and Belarus

3,800 km

Share of EU GDP²

12.7 %

Ukraine support (% of GDP, average)³

2.07 %

Defence expenditure (% of GDP, average)⁴

4.07 %

Defence industry major players

Kongsberg, Nammo, Saab,
Patria, WB Group

Main liquefied natural gas terminals

Swinoujście (Poland),
Klaipėda (Lithuania),
Hamina (Finland),
Lysekil and Nynäshamn (Sweden),
Melkøya (Norway)
floating LNG terminal in Inkoo,
Finland (more FSRUs are under
construction in Gdansk and Paldiski)

Major ports

Gdansk, Gdynia (Poland),
Klaipėda (Lithuania),
Riga (Latvia),
Tallinn (Estonia),
Helsinki (Finland),
Gothenburg (Sweden),
Oslo, Bergen (Norway)

Offshore wind planned

about **20 GW** in the Baltic Sea by 2030
(declared), rising towards **30** by 2035

From Coordination to Strategic Agency

In addition to all nine countries being members of NATO and seven belonging to the EU (with Norway and Iceland as exceptions), the region does not suffer from a lack of cooperation formats: some are cross-sectoral, while others much more focused on specific areas of cooperation. This introduction aims to mention just some of the key ones: Nordic Baltic Eight (NB8, also in the plus configuration with countries like Poland and Germany), the Council for Baltic Sea States (CBSS), the Nordic Council of Ministers, the Baltic Council of Ministers, Joint Expeditionary Forces, NORDEFCO, Eastern Flank, the Parliamentary Conference of the

Baltic Sea, the Nordic Council, the Three Seas Initiative, Baltic Energy Market Interconnection Plan. It is also worth noting the main EU format, namely the European Strategy for the Baltic Sea States. Not all the countries, i.e. Nordic, Baltic and Poland, are part of each group; there are different organisational frameworks that have been established over the years and fit various, often very specific purposes. For example the CBSS was established with the goal of fostering cooperation and stability in the region. As the bonds and links between the countries grew, the thematic areas and list of projects undertaken under the CBSS auspices also increased.⁵

Consultations alone, however, do not replace strategy. **The main challenge is not the number of regional formats but the absence of a mechanism that translates political convergence into sustained and tangible action. The strategic alignment is not evolving into political clout outside the region.** Agreements on taking action, for example on the issue of the shadow fleet, are not sufficient because of fear of escalation and a concern that the country involved will not receive sufficient backing.

The next stage of regional cooperation should therefore focus on strengthening strategic agency rather than creating new formats. By clarifying the roles of existing frameworks and reinforcing political ownership, the Nordic–Baltic–Polish grouping could develop into a more coherent strategic actor within the wider Euro-Atlantic security architecture, without duplicating NATO and EU structures.

From Principles to Deliverables

The argument of this report is simple: the future European security order will be shaped not only by the outcome of the war in Ukraine but by whether Europe’s frontline democracies can organise themselves, politically, economically and strategically, for a long period of competition and uncertainty.

The Nordic-Baltic-Polish region needs to overcome this challenge and this report sets out how.

The six goals presented in the report form a single strategic agenda. At its core lies one proposition: the Nordic-Baltic-Polish region should no longer be viewed merely as Europe’s frontline. **It should be recognised as one of the principal architects of Europe’s future security order.**

1	Prepare a New European Strategy Towards Russia
2	Anchor Ukraine in the European Union and NATO
3	Build a Stronger European Pillar of NATO
4	Fill the Nuclear Gap
5	Protect Critical Energy Infrastructure by Design and Deterrence
6	Secure the Region’s Critical Raw Materials Value Chain

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Foreign Policy and European Integration

Introduction

The Baltic states and Poland spent much of the last two centuries under Russian or Soviet domination. The Nordic countries avoided direct occupation, but proximity to Moscow still shaped their strategic outlook. As a result, the region never stopped treating Russia as a long-term strategic threat, even when much of Western Europe increasingly viewed it as a potential partner rather than an adversary.

For most of the post-Cold War period, Western policy rested on an assumption that Russia could be managed through engagement and that the gradual enlargement of NATO and the European Union would steadily extend stability across Europe.

Russia's full-scale invasion of Ukraine exposed both assumptions as fundamentally flawed. Engagement failed to moderate Moscow, while the grey zone left outside NATO and the EU became an invitation to aggression rather than a buffer against it.

The region's task now is to turn that record into political influence. Having recognised the nature of the Russian threat earlier than much of Europe, it has both the credibility and the responsibility to help shape Europe's future strategy towards Russia.



GOAL

1

Prepare a New European Strategy Towards Russia

For three decades, European policy towards Russia focused on managing relations with Moscow rather than the strategic threat Russia posed to European security. That approach is no longer sustainable. **Europe must now build a security order capable of deterring and containing a long-term strategic competitor rather than preparing for an eventual return to normal relations.**

This shift requires more than a change in policy – it demands a different strategic mindset. Europe can no longer dismiss Russia while hoping for relations to improve, but should treat it as a **structural threat around which Europe's long-term security architecture must be organised.**

The Nordic-Baltic-Polish region is uniquely positioned to lead this transition: it has consistently viewed Russian behaviour as a structural threat rather than a temporary challenge and its experience demonstrates that the end of active hostilities will not mark the end of strategic competition.



Nordic-Baltic Summit in Harpsund, Sweden with participation of the Polish Prime Minister, 2024

Source x.com/SwedishPM

Post-war must not mean post-threat

Russia's ability to threaten European security will not disappear with a ceasefire or even a negotiated settlement. The Kremlin has adapted its economy, defence industry and political system to sustain long-term confrontation with the West. Military reconstitution, hybrid operations, cyber activity, disinformation, political interference and the coercive use of energy, migration and economic pressure will remain integral instruments of Russian statecraft regardless of developments on the battlefield. **Europe's strategy must therefore be designed to endure strategic competition rather than a temporary crisis.**

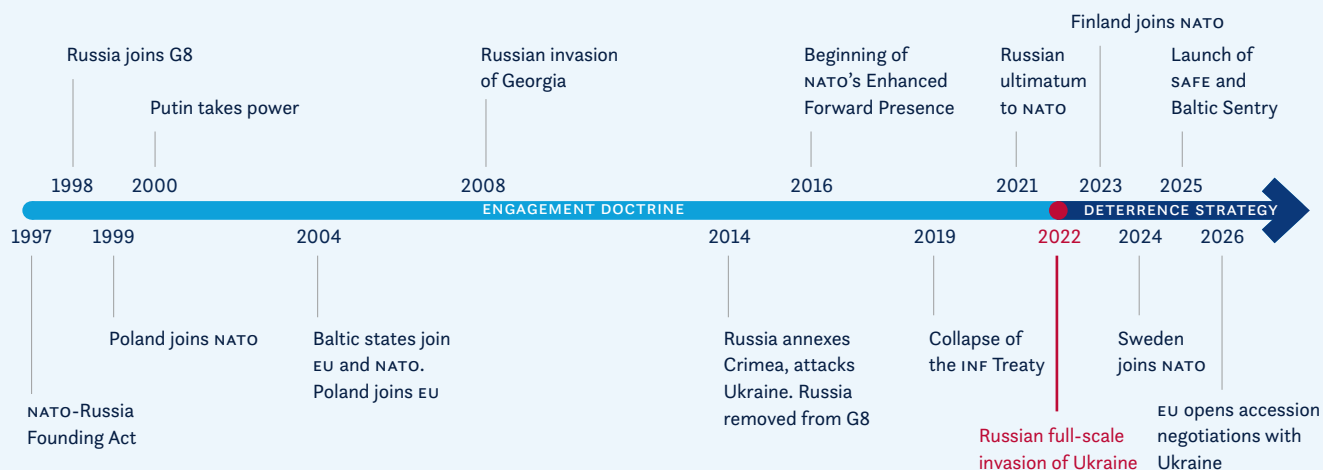
This strategy operates across two distinct but interconnected horizons. The first concerns the conduct of the war itself and the political choices that will shape its outcome. It includes how negotiations are organised, whether Europe speaks with a single voice, how Russia is engaged and which issues properly belong on

the negotiating table. The second concerns Europe's long-term posture towards Russia once the fighting ends.

Most political disagreement and most strategic risk lie in the first horizon. The second is guided by a single principle: post-war must not mean post-threat. Yet the two horizons cannot be separated. The post-war security order is being shaped now, while the war continues, rather than in a more favourable political environment assumed to follow.

For the region, this has two strategic implications. **First, regional actors must help shape the negotiations rather than merely adapt to their outcome. Second, the future architecture of Ukraine's integration into the European Union and NATO should be established before negotiations with Russia begin, rather than becoming a bargaining chip over their course.**

Milestones in the West's changing approach to Russia



The Strategic Assessment

An effective strategy must begin with a realistic assessment of the adversary. Russia's methods have evolved over time, but its strategic objectives have remained remarkably consistent. Since publishing its draft security treaties in December 2021, the Kremlin has consistently pursued three core goals: preventing Ukraine's integration into NATO, limiting Allied military presence along Russia's borders and reshaping Europe's post-Cold War security architecture. The full-scale invasion of Ukraine did not create these objectives; rather, it was intended to achieve them.

This continuity reflects more than policy. The Kremlin approaches negotiations as an instrument of strategy rather than conflict resolution,

expecting Western positions to evolve with electoral cycles while its own objectives remain unchanged. Since Vladimir Putin assumed power in 2000, he has outlasted three presidents of the European Commission, three German chancellors, four U.S. presidents and eight British prime ministers.

That experience has reinforced Moscow's belief that time favours Russia and that political priorities in Western democracies inevitably change. The same three demands reappeared during the Trump–Putin summit in Anchorage in August 2025 and in the peace proposals that followed.⁶ Their presentation evolved, but their substance remained constant.

The implications for European strategy are significant. Future negotiations are unlikely to centre primarily on territorial adjustments, though they remain important. The decisive questions concern Ukraine's strategic orientation, the credibility of its long-term security guarantees and the future balance of power in Europe. Diplomatic activity should therefore not be mistaken for strategic change. **Negotiations may alter the form of the confrontation without changing its underlying objectives, while a ceasefire may suspend military operations without resolving the conflict that produced them.**

For the Nordic-Baltic-Polish region, this assessment leads to a clear conclusion. Strategy cannot be built on expectations of Russian transformation or on the assumption that a negotiated settlement will fundamentally change Moscow's long-term objectives. It must instead be based on **sustained deterrence, military resilience and the recognition that competition with Russia will remain a defining feature of Europe's security environment** for the foreseeable future.

Trump and Putin at the Anchorage Summit, 2025

Source: whitehouse.gov



The Principles of a Regional Strategy

A sustainable strategy towards Russia should be guided by a small number of clear and consistent principles. These are intended to shape long-term policy rather than respond to individual crises, recognising that strategic competition with Russia is likely to persist regardless of developments on the battlefield.

First, there can be no return to spheres of influence. Europe's security cannot be built on arrangements that recognise privileged Russian interests over the sovereign choices of its neighbours. Decisions concerning Ukraine, or any other European state, cannot become the subject of great-power bargaining. A new Yalta is neither acceptable nor sustainable.

Second, negotiations must serve strategic objectives rather than replace them. Diplomacy remains indispensable, but negotiations should be treated as one instrument of strategy, not as a strategy in themselves. Political settlements that weaken deterrence or leave fundamental security questions unresolved are unlikely to produce lasting stability.

Third, security must take precedence over temporary political expediency. Decisions taken to accelerate a ceasefire should not create vulnerabilities that undermine Europe's long-term security. The durability of the post-war order will depend less on the speed of negotiations than on the credibility of the security architecture that emerges from them.

Fourth, European unity must be matched by strategic coherence. Differences in national interests and political priorities are inevitable. However, they should not obscure the common objective of preventing Russia from rebuilding its capacity to coerce its neighbours or to revise Europe's security order. Unity is most valuable when it produces consistent strategic outcomes rather than temporary political compromises.

Finally, strategy must recognise that time is itself a strategic variable. Russia has repeatedly demonstrated its willingness to pursue long-term objectives across electoral cycles and political transitions in the West. Europe must therefore adopt policies that remain credible and sustainable over time, rather than those designed primarily to manage immediate political pressures.

Principles of a regional strategy



No spheres of influence

Sovereign choices cannot become the subject of great-power bargaining



Negotiations as a tool

Diplomacy serves the strategy, it is not a strategy in itself



Security before haste

Speed of agreement matters less than the credibility that follows



Unity with coherence

Shared positions must produce consistent outcomes, not just agreement



Time as a variable

Policy must hold across election cycles

From Sanctions to Strategic Pressure

Sanctions should remain a strategic instrument rather than a temporary response to the war. Their purpose is not only to increase the immediate cost of Russian aggression but **to shape the long-term conditions under which any future relationship with Russia will develop**. By constraining Russia's military, technological and financial capacity over time, sanctions reinforce the security objectives that any durable settlement must satisfy. Their cumulative effect is already measurable. According to the President of the European Commission, Ursula von der Leyen, Russia's energy revenues had fallen by roughly 40 per cent by early 2026, demonstrating that sustained pressure compounds over time rather than fading with each news cycle.⁷

For the Nordic-Baltic-Polish region, this means resisting pressure for premature sanctions relief and insisting that sanctions remain linked to verifiable changes in Russian behaviour, rather than to the mere fact of engaging in negotiations or reaching a ceasefire. **The region should argue that sanctions remain tied to broader security conditions essential for a stable European order**, including the withdrawal of Russian nuclear weapons from Belarus, the demilitarisation of Kaliningrad and other measures that reduce Russia's capacity to threaten NATO's eastern flank. Measures directed against individuals responsible for the aggression should remain in force regardless of diplomatic developments.

The region should also lead efforts to strengthen sanctions enforcement. This includes targeting Russia's shadow fleet, disrupting sanctions circumvention through third countries, tightening export controls on critical and dual-use technologies and coordinating legal, financial, diplomatic and intelligence measures to increase the long-term cost of Russian revisionism. The

EU's twenty-first sanctions package, adopted in July 2026, illustrates the direction this effort should take. It expands the list of sanctioned shadow-fleet vessels to over 670, for the first time targets vessels supporting the fleet through bunkering and other logistical services and extends restrictions to LNG tankers sold to Russia.⁸ **The objective is not punishment for its own sake but to shape strategic incentives and constrain Russia's ability to reconstitute its military power.**

Maintaining pressure does not require the complete suspension of dialogue. The region should support narrowly defined technical channels for managing practical issues where mutual interests exist, without allowing such contacts to evolve into political normalisation. Norway's long-standing cooperation with Russia on fisheries management in the Barents Sea demonstrates this approach. Even after Norway sanctioned two Russian fishing companies in 2025 and Russia responded by suspending its participation in several joint working groups, the core of the framework endured. Annual fishing quotas for 2026 were agreed and joint scientific cooperation continued despite broader political tensions.⁹ The lesson is clear: **limited technical cooperation can reduce operational risks without becoming a pathway to political normalisation.**

Sanctions are therefore not a substitute for military deterrence but one of its essential pillars. Together with sustained defence investment, political unity and support for Ukraine, they form part of a long-term strategy designed to reduce Russia's capacity to wage aggression and strengthen Europe's security. For the Nordic-Baltic-Polish region, maintaining that pressure is not simply a matter of solidarity with Ukraine – it is a core requirement of its own long-term security.

Oil tanker from
Russia's shadow fleet

Source: Adobe Stock



Making Russia Pay

Strategic pressure should not end with sanctions. It must also ensure that Russia bears the financial, legal and personal consequences of its aggression. Accountability is not only a matter of justice but also a strategic instrument of deterrence. Demonstrating that aggression carries lasting costs reduces the credibility of Russia's coercive strategy and strengthens the foundations of Europe's future security order.

The most immediate opportunity lies in Russia's immobilised sovereign assets. Around €210 billion remains frozen within the EU. Therefore, the Nordic-Baltic-Polish region should continue advocating their use as a practical instrument of accountability rather than allowing them to remain a symbolic reserve. The proceeds should support three mutually reinforcing objectives: financing Ukraine's defence and reconstruction, facilitating Ukraine's accession to the EU and

helping frontline Member States absorb the fiscal costs associated with enlargement and long-term security commitments. **Used in this way, the assets become both a source of support for Ukraine and a permanent reminder that aggression carries financial consequences.**

Financial accountability should be complemented by legal accountability. The region should continue supporting the establishment of a Special Tribunal for the Crime of Aggression against Ukraine and other mechanisms capable of ensuring individual responsibility for those who planned, ordered and directed the invasion. **Lasting peace cannot rest solely on political agreements if responsibility for the crime itself remains unresolved.**

Accountability must also extend to those who directly participated in the aggression. Building

on Estonia's national measures barring Russian combatants and ex-combatants from its territory, the EU has agreed on the basis for a Schengen-wide visa ban on Russian nationals who fought against Ukraine. As of August 2026, the measure has not yet entered into force: France and Italy – both of which continue to derive significant revenue from Russian tourism – prevented its adoption.¹⁰ The Nordic-Baltic-Polish region should therefore continue promoting a coordinated European approach to ensure that participation in the war does not later provide unrestricted access to the Schengen Area. **Such measures recognise that the consequences of aggression**

should apply not only to the Russian state but also, where appropriate and consistent with international law, to those who actively carried it out.

Making Russia pay is therefore not about retribution. It is about reinforcing deterrence, strengthening the rules-based international order and ensuring that future acts of aggression carry predictable financial, legal and political consequences. Together with strategic pressure, military deterrence and sustained support for Ukraine, accountability forms an essential pillar of Europe's long-term strategy towards Russia.

Hybrid Pressure and the Paradox of the Ceasefire

The threat will not disappear when the fighting stops. Russia already treats the Nordic-Baltic-Polish region as a theatre of continuous confrontation – combining cyber operations, disinformation, sabotage, border pressure, economic coercion and the instrumentalisation of migration while remaining below the threshold of open conflict. Recent incidents, including repeated violations of Allied airspace, suspected sabotage against critical undersea infrastructure in the Baltic Sea and the use of civilian vessels linked to Russia's shadow fleet, demonstrate that strategic competition is already extending well beyond the battlefield. A ceasefire in Ukraine is therefore unlikely to reduce these threats. **Moscow can be expected to redirect additional resources towards hybrid operations** while avoiding the costs and risks of direct military confrontation.

For the Nordic-Baltic-Polish region, **hybrid pressure should therefore be recognised as a permanent feature of the European security environment** rather than activity that merely

sits below the threshold of war. Meeting that challenge requires permanent institutions rather than ad hoc coordination. The first priority is a standing regional mechanism for intelligence sharing, common threat assessment and operational coordination, building on the renewed role of the Council of the Baltic Sea States. The second is a pre-agreed political protocol for attribution and response. Hybrid attacks should no longer trigger improvised consultations. They should activate agreed procedures for attribution, coordinated political decision-making and graduated collective responses.

The deeper problem is political rather than technical. Hybrid operations are deliberately designed to exploit uncertainty within the Alliance. Russia's objective is not simply to remain below the Article 5 threshold but to exploit disagreement over where that threshold lies. By encouraging Allies to treat each incident as an isolated national problem, Moscow seeks to fragment NATO's political response while maintaining continuous strategic pressure.

The debate that followed recent incidents in the Baltic region, including calls by several Allies to strengthen consultations under Article 4 while others argued that individual events remained below the threshold for collective action, illustrates precisely **the ambiguity that Moscow seeks to exploit**. As NATO's frontline, the Nordic-Baltic-Polish region is likely to remain the principal testing ground for this strategy.

The region should therefore seek an **Alliance-wide understanding that a sustained and coordinated campaign of hybrid attacks may constitute an Article 5 contingency** even if no single incident does. Hybrid deterrence

cannot depend on political improvisation during a crisis. It requires common thresholds, pre-agreed attribution mechanisms and a shared understanding of how the Alliance will respond before the next incident occurs.

The paradox of a ceasefire is not that hybrid threats emerge afterwards, but that they become the principal arena of strategic competition. **Deterrence in the coming decade will depend not only on military strength but also on NATO's ability to recognise, attribute and respond collectively to sustained hybrid campaigns before they evolve into conventional crises.**

Enhancing Regional Leadership

A strategy is only as effective as the institutions that sustain it. The Nordic-Baltic-Polish region has consistently demonstrated strategic leadership in responding to Russian aggression, yet much of that leadership remains informal, reactive and dependent on political circumstances. If the region is to shape Europe's long-term Russia policy rather than simply respond to it, **strategic cooperation must become institutional rather than crisis-driven**.

The region should therefore move beyond ad hoc coordination and establish a permanent Nordic-Baltic-Polish Strategy Centre, bringing together leading regional think tanks, research institutions and policy experts. Its role should extend beyond information exchange; the Centre should produce common strategic assessments, identify emerging risks, coordinate regional initiatives and develop joint policy recommendations before major NATO and EU decisions are taken. In doing so, it would enable the region to strengthen its collective ability to influence Alliance and

European decision-making through coordinated positions, shared analysis and long-term strategic planning. Acting together, the Nordic-Baltic-Polish states represent NATO's principal frontline against Russia and possess operational, political and societal experience that has become increasingly relevant for the wider Alliance. In order to finance the Centre, a dedicated regional fund should be established, drawing from the experience of the International Visegrad Fund, which has been an important tool for financing Central European initiatives.

Establishing Nordic-Baltic-Polish Strategy Centre would also help preserve strategic continuity across electoral cycles and changes of government. Russia's long-term approach has consistently outlasted political transitions in Western democracies. The region's response should therefore be built around institutions capable of maintaining common priorities, sustaining political cohesion and updating strategy as the security environment evolves.

The objective is not simply better regional co-ordination. It is to transform the Nordic-Baltic-Polish region from a coalition that responds effectively to crises into one that routinely

shapes NATO and European policy before strategic decisions are made. Strategic leadership should become a permanent capability rather than an ad hoc political response.

Regional Conditions for Any Future Settlement

A ceasefire alone cannot become the foundation of Europe's future security order. For the Nordic-Baltic-Polish region, the objective is not peace at any price but a settlement that produces a more stable strategic balance and reduces the likelihood of renewed Russian aggression.

Ukraine must retain the sovereign right to determine its own foreign and security policy, including its future relationship with the EU and NATO. Russia should not be granted a sphere of influence over neighbouring states, nor should any settlement legitimise territorial conquest achieved through aggression. **The region should reject any settlement that merely freezes the current front line while leaving Russia's offensive military posture unchanged.**

For the Nordic-Baltic-Polish region, a durable settlement cannot be separated from the military balance that follows it. Any discussion of Europe's future security architecture should therefore **include the withdrawal of Russian nuclear weapons from Belarus, the demilitarisation of Kaliningrad Oblast** and other measures that permanently reduce Russia's capacity to threaten NATO's eastern flank. **These issues should be addressed as part of negotiations on Europe's long-term security architecture rather than as preconditions for a ceasefire or the opening of peace negotiations.** These are not secondary confidence-building

measures but core elements of a stable post-war European security order.

The future European security architecture must also extend beyond the Baltic to the High North. Arctic security, maritime routes, subsea infrastructure and critical energy assets have become integral to Europe's collective defence. NATO's Baltic Sentry mission provides a practical model for protecting critical infrastructure. It should be progressively expanded northwards alongside a persistent Allied presence capable of operating in Arctic conditions. The broader issue of critical infrastructure resilience is addressed in detail in the chapter on Energy and Resilience.

Sanctions should remain linked to verifiable changes in Russian behaviour rather than to the mere existence of negotiations or a ceasefire. Accountability mechanisms, credible security guarantees and long-term support for Ukraine should continue beyond the formal end of hostilities to ensure that any settlement reinforces European deterrence.

The Nordic-Baltic-Polish region should therefore judge future negotiations not by the speed with which they produce an agreement but by whether they establish a more secure European order. The objective is not simply to end the current war but to prevent the next one.

Europe and the Region at the Table

The future European security order cannot be negotiated without Europe. Russia's aggression extends far beyond Ukraine through energy coercion, cyber operations, disinformation, migration pressure and attacks against critical infrastructure. The EU has therefore become not only Ukraine's principal political and economic supporter but also a direct target of Russian coercion. Decisions concerning sanctions, reparations, accountability, reconstruction and long-term security guarantees should consequently be anchored within European institutions rather than dispersed across separate national initiatives.

European participation alone, however, will not be sufficient. **The states carrying the greatest security burden must also help shape the settlement.** Much of the operational diplomacy surrounding Ukraine's future security guarantees has so far been driven by a relatively small group of larger European powers together with Ukraine and, at different stages, the United States. Yet the countries responsible for hosting Allied forces, protecting NATO's eastern flank, sustaining military mobility, securing critical infrastructure and supporting Ukraine over the long term are not always among those shaping the negotiating agenda.

The Nordic-Baltic-Polish region should therefore have a permanent voice in discussions on Europe's future security architecture. This is not only a question of political representation but of strategic responsibility. Any settlement

will ultimately depend on the countries that will implement it on NATO's eastern flank. Their participation should therefore be regarded as a structural requirement rather than a political concession. Ukraine also has a strong interest in ensuring that its closest regional partners remain fully engaged throughout any negotiation process.

The same strategic logic extends beyond Europe. Russia is a two-theatre power and Europe's long-term security cannot be separated from developments in the Indo-Pacific. North Korea has become directly involved in Russia's war effort, while Japan has emerged as one of Ukraine's most significant financial supporters and South Korea has become an increasingly important defence-industrial partner for NATO's eastern flank. Regular strategic consultations with NATO's Indo-Pacific partners should therefore become a permanent element of Europe's broader Russia strategy, particularly in the areas of sanctions implementation, defence-industrial cooperation and critical technologies.

A durable settlement requires both political legitimacy and strategic credibility. Europe must be represented, but Europe's frontline must also help shape the decisions that will determine its own security. The wider coalition confronting Russian revisionism should likewise be reflected in the institutions and partnerships that underpin Europe's future security order.

Roadmap for Attaining the Goal

SHORT TERM

- Agree to common red lines and minimum conditions before any negotiations with Russia or any future United States-led peace initiative begin. This ensures that the Nordic-Baltic-Polish region enters negotiations with a single strategic position rather than improvising under pressure.
- Secure permanent participation of the Nordic-Baltic-Polish region in every format addressing Ukraine's security guarantees and Europe's future security architecture.
- Establish a standing regional mechanism for intelligence sharing, hybrid-threat assessment and operational coordination.
- Adopt a pre-agreed political framework for attribution and graduated responses to hybrid attacks, ensuring that cyber operations, sabotage, drone incursions and attacks against critical infrastructure trigger coordinated Allied action rather than ad hoc consultations.
- Strengthen enforcement of existing sanctions by prioritising action against circumvention networks, the shadow fleet and illicit technology transfers.

MEDIUM TERM

- Establish a Nordic-Baltic-Polish Strategy Centre responsible for producing common strategic assessments, coordinating regional initiatives and maintaining a shared long-term strategy towards Russia.
- Develop permanent mechanisms for coordinating regional positions ahead of NATO and EU decisions.
- Promote a common regional position on the minimum conditions for any durable settlement, including Ukraine's sovereign right to determine its own future, the withdrawal of Russian nuclear weapons from Belarus, the demilitarisation of Kaliningrad and measures that permanently reduce Russia's ability to threaten NATO's eastern flank.
- Expand cooperation in the Baltic and the High North by strengthening the protection of maritime routes, critical energy assets and undersea infrastructure.
- Institutionalise regular strategic consultations with NATO's Indo-Pacific partners – Japan, South Korea, Australia and New Zealand – on Russia, sanctions implementation, defence-industrial cooperation and critical technologies.

LONG TERM

- Anchor the Nordic-Baltic-Polish region's strategic priorities permanently within NATO and EU decision-making so that they outlast political cycles.
- Build a permanent Nordic-Baltic-Polish strategic community capable of shaping European policy towards Russia beyond the current phase of the war.
- Ensure that deterrence, resilience and defence, rather than expectations of normalisation, remain the foundation of regional security through any future ceasefire or political settlement.

Obstacles and Limitations

- Pressure for a rapid ceasefire may freeze rather than resolve the conflict, leaving Russia's military posture and hybrid capabilities largely intact.
- Maintaining Allied unity will become more difficult as political priorities shift and the costs of long-term deterrence increase.
- Lack of EU unanimity, differing threat perceptions and the absence of agreed hybrid-response mechanisms continue to constrain timely collective action.
- Without permanent regional institutions, cooperation risks remaining crisis-driven rather than becoming a lasting feature of European security.
- Diverging priorities between the United States, NATO and the EU could complicate the development of a coherent long-term strategy towards Russia.

GOAL

2

Anchor Ukraine in the European Union and NATO

Ukraine as the Region's Strategic Investment

Ukraine's integration into the European Union and NATO is often framed as a question of solidarity. This perspective is understandable but incomplete. For the Nordic-Baltic-Polish region, Ukraine's integration is first and foremost **a strategic investment** in long-term security.

The outcome of Ukraine's European and Euro-Atlantic integration will shape the security environment of the region for decades. A sovereign, stable and integrated Ukraine strengthens deterrence, expands strategic depth, enhances regional resilience and reinforces the eastern flank of both NATO and the EU. Conversely, a permanently unstable or strategically ambiguous Ukraine would remain a source of insecurity, invite external interference and impose lasting costs on neighbouring states. The region should therefore support Ukraine's integration not only because it is morally justified, but because it directly serves its own security interests. That support rests on Ukraine's right to

determine its own future. **It is for Ukraine, as a sovereign state, to define its course** and any attempt to settle its alignment over its head, or to bargain away its European and Euro-Atlantic ambitions without its consent, should be rejected from the outset as illegitimate.

Ukraine should already be viewed not as a recipient of security, but as its provider. With the largest combat-experienced military force in Europe, a rapidly evolving defence-industrial base and unmatched operational knowledge of modern warfare, Ukraine has become a significant strategic asset for the Euro-Atlantic community. The central task is therefore not how Europe can help Ukraine alone. It is how Europe and Ukraine can strengthen one another. Put plainly, the guarantees for Ukraine and the deterrence of the eastern and northern flanks are **the same deal and the same package**, not two separate negotiations – and the region should insist they be treated as one.

Government Support to Ukraine by donor country



Source: Kiel Institute¹²

The scale of the region's stake is already visible in what it has carried. The Nordic and Baltic states and Poland have contributed €45 billion in military, financial and humanitarian support.¹¹ The logic runs in both directions. A strong Ukraine is also a guarantor of the region's security, not only a beneficiary of it. That is why the region should treat Ukraine's recovery as a strategic project rather than an act of charity. The upcoming 2027 Ukraine Recovery Conference in Tallinn will provide an important opportunity to advance this agenda – Estonia intends to leverage the NB8 format to engage the wider region in the conference's preparations.

A Three-Layer Architecture of Security Guarantees

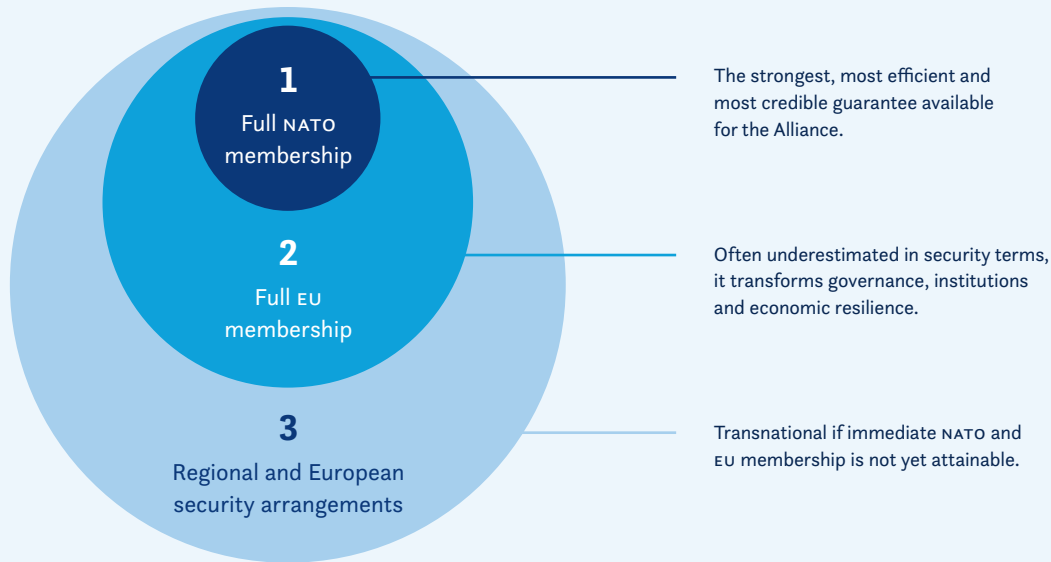
The debate surrounding Ukraine's future security arrangements has often been presented as a choice between NATO membership and alternative guarantees. This is the wrong framework. The region should advocate **a layered architecture that preserves NATO membership as the preferred outcome while simultaneously developing credible alternatives capable of reducing strategic uncertainty.**

The first layer remains **full NATO membership**. Membership provides the strongest, most efficient and most credible guarantee available. It also remains the most effective

deterrent against future aggression. The path opened at the Vilnius summit of 2023 should therefore be sustained rather than quietly abandoned.¹³

The second layer is **full membership in the European Union**. The importance of EU membership is often underestimated in security discussions. Yet accession fundamentally transforms governance, institutions, infrastructure, economic resilience and political integration. In strategic terms, EU membership creates long-term stability and significantly raises the costs of external coercion.

A three-layer architecture of security guarantees



The third layer consists of regional and European security arrangements. Should immediate NATO membership remain politically unattainable, the region should support the development of transitional mechanisms capable of providing meaningful deterrence. These could include regional security compacts, collective defence arrangements, enhanced military integration and deeper operational cooperation among European states.

That layer is about to acquire real content: the EU security strategy expected in autumn 2026 is intended to operationalise Article 42.7 of the

Treaty on European Union. Ukraine should be seen here as an asset, not only a beneficiary: its battlefield experience can inform both the drafting of the clause and, later, its implementation. **Importantly, these arrangements should be viewed as bridges rather than substitutes.** The destination remains unchanged: full integration into both NATO and the EU. Anything short of that would risk recreating the security vacuum the Budapest memorandum left in the 1990s, the very environment that made this war possible. The military substance of this European pillar is carried further in the chapter on international security and defence.

Ukraine and the Future of European Enlargement

Ukraine's accession is reshaping the debate on enlargement across Europe. In June 2026, after Hungary lifted its veto, the EU opened the first cluster of accession negotiations with Ukraine and Moldova.¹⁴ The region should consistently defend a simple principle. **Enlargement remains the most successful strategic instrument the EU has ever developed.** The accession of Ukraine should therefore not be viewed as an exceptional political favour but as the continuation of a process that has repeatedly strengthened European stability, prosperity and security. EU enlargement has implications not only for candidate countries, but also for Russia. **An integrated Ukraine becomes a standing demonstration to the societies of Russia and Belarus that a sovereign, non-imperial future is within reach and does not wait on Moscow's permission, a form of pressure that no sanction can reproduce.**

The region's role in the Council of the European Union is not only to support Ukraine's accession but to act as a procedural guardian of the process. It means insisting that clusters advance on the basis of reform delivery, not political bargaining. It also means preventing individual member states from coupling Ukraine's file to unrelated disputes over budgets, the rule of law or bilateral grievances. This kind of coupling is the most likely mechanism through which the unanimity requirement will be exploited in the coming negotiating rounds. On Ukraine's integration itself, the region's political position has been consistent since before the war, which leaves it well placed to hold the process to its stated criteria.

At the same time, the region must avoid creating a hierarchy of candidates. The Western Balkans and Moldova remain essential components of Europe's long-term security architecture. Accelerating Ukraine's accession should not come

at the expense of other enlargement processes. The objective should be a stronger Europe rather than a more selective Europe. The simultaneous opening of talks with Moldova carries a particular risk if the two files remain informally coupled, since Moldova can absorb reforms at a pace Ukraine cannot sustain under wartime conditions. The region should resist any arrangement that subordinates Ukraine's pace to Moldova's and equally any that disadvantages Moldova for reasons beyond its control. The precedent of Croatia, left waiting behind a less prepared cohort after 2004, is a reminder that pace disparities between candidates moving together carry real political costs.

Frontline states will carry part of the budgetary cost of this enlargement, even though the phase-in of direct payments over a decade and the caps on transfers are designed to soften it. A **transition facility**, funded partly from the immobilised Russian assets, would cushion them and help sustain political support for accession while distributing the costs more fairly.

The financing of accession will be decided inside the same multiannual budget that funds agriculture, cohesion and competitiveness, and a new EU security strategy expected in September 2026 will compete for the same finite resources. The strategic ambition that makes Ukraine's integration necessary will therefore generate spending pressures that could crowd out the financing that makes it possible. A declaration of political support means little unless it is translated into active defence of the scale and structure of the Ukraine Reserve through the final stage of budget negotiation. The disbursement mechanism of that reserve, which operates through comitology and so does not depend on unanimity at the moment funds are released, is an underappreciated safeguard that should be protected rather than treated

as a technical detail. Carrying that argument through the Council also requires Germany: its economic, industrial and budgetary weight is what can turn a settled regional position into a majority inside the EU. The region should

not simply wait for Berlin to come around, it should draw Germany towards its own agenda on enlargement and the budget now, through bilateral and multilateral formats.

From Guarantees to Irreversible Integration

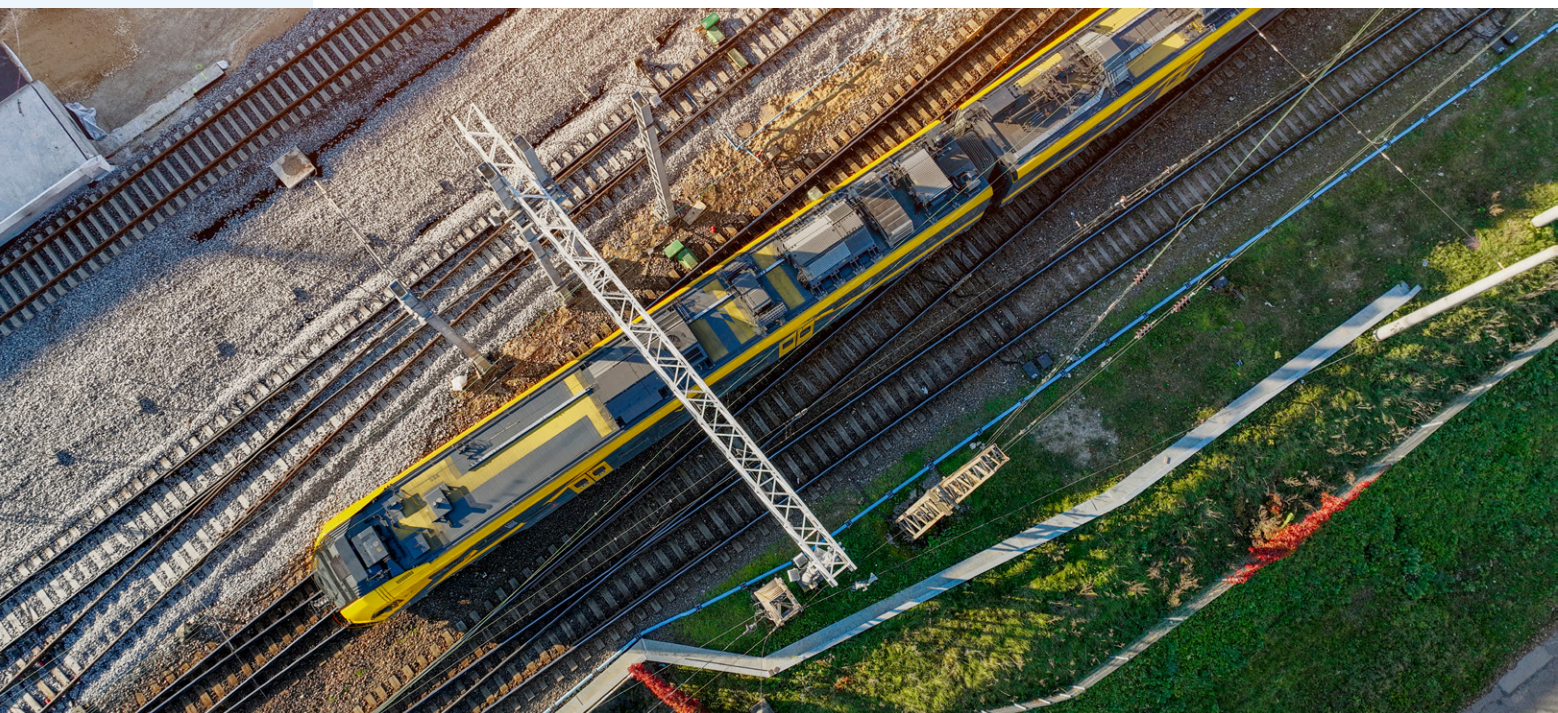
Formal security guarantees alone are insufficient. The most durable guarantees are often embedded not in treaties but in infrastructure, investments and institutions. The region should therefore pursue a strategy of **irreversible integration**. Rail connections, energy interconnectors, digital infrastructure, defence-industrial cooperation, logistics corridors and military mobility networks create facts on the ground that become increasingly difficult to reverse.

Rail Baltica provides an important model, and the same logic should be extended eastward through the gradual integration of Ukrainian transport infrastructure into European

networks. Energy integration should proceed in a similar manner. The synchronisation of the Baltic states with the continental European grid in February 2025 shows how an irreversible technical step removes a lever of coercion, and Ukraine's own grid has run with continental Europe since 2022. Defence-industrial cooperation represents another critical pillar, through joint ammunition production, drone manufacturing, military innovation programmes and cross-border defence investment. In this context, infrastructure should be considered not solely from an economic perspective, but also as a component of defence preparedness and deterrence.

Rail Baltica
construction site

Source: Adobe Stock



Reconstruction as a Strategic Project

The reconstruction of Ukraine should be treated as one of the largest strategic opportunities in contemporary Europe. Too often reconstruction is discussed exclusively through the lens of development assistance, which underestimates its geopolitical significance. Reconstruction provides an opportunity to anchor Ukraine permanently within European economic, technological and security networks.

The region should therefore advocate the establishment of a Nordic-Baltic-Polish-Ukrainian Reconstruction and Resilience Bank, owned jointly by the Nordic, Baltic and Polish states together with Ukraine and given a mandate

that spans reconstruction, energy integration and defence and dual-use industry.¹⁵ Such an institution would finance critical infrastructure, support industrial recovery, strengthen defence-industrial cooperation and attract international investment. Most importantly, it would transform reconstruction from a temporary programme into a long-term strategic partnership. Shared ownership of infrastructure creates shared interests. An aggressor contemplating future attacks would confront not only Ukrainian assets but investments linked to multiple regional and international stakeholders. In this sense, **reconstruction itself becomes a form of deterrence.**

The Resilience and Reconstruction Bank

Joint shareholders



Financing mandate

Reconstruction

Rebuilding Ukraine's infrastructure and industrial base

Energy integration

Grid, LNG and cross-border interconnections

Defence and dual-use industry

Joint production and dual-use infrastructure

How the End of the War Is Described

How the war's end is described carries consequences of its own. Diplomatic language has shifted from Ukrainian victory towards a just and lasting peace. That shift is not only rhetorical, it quietly lowers the bar. A just and lasting peace no longer requires that Russian aggression visibly fail. Success, in the sense that matters here, means exactly that: Russia failing to achieve its war aims, and

Ukraine keeping its sovereignty intact. This distinction reaches beyond Ukraine's borders. A visible Russian failure would change the calculations of others living under Russian pressure, from Georgia to Belarus. A managed stalemate would not. The region is well placed to make this argument. It has consistently warned that exhaustion should not be mistaken for peace.

A Regional Security Community

The long-term objective extends beyond Ukraine itself. The Nordic-Baltic-Polish region should work toward the emergence of a wider regional security community encompassing Ukraine and, over time, other European partners. The purpose is not to create alternative institutions to NATO or the EU. **The purpose is to create a stronger regional pillar within**

them. Such a community would be characterised by shared strategic assessments, integrated infrastructure, coordinated defence planning, common resilience mechanisms and deep political cooperation. In practical terms, this would represent one of the most significant transformations of European security since the end of the Cold War.

Roadmap for Attaining the Goal

SHORT TERM

- Hold Ukraine's full NATO and EU membership as the region's declared objective, while building the layered guarantees so that transitional arrangements never harden into a permanent substitute.
- Press to accelerate Ukraine's accession negotiations and support the reforms they require, building on the opening of the first cluster in June 2026.
- Act as procedural guardian of Ukraine's accession inside the Council, holding clusters to reform delivery and preventing the coupling of Ukraine's file to unrelated disputes, and defend the scale and structure of the Ukraine Reserve through the final stage of budget negotiation.
- Expand the infrastructure and energy links that make integration irreversible, from rail and grid connection to interconnectors and digital networks.

MEDIUM TERM

- Establish the Nordic-Baltic-Polish-Ukrainian Reconstruction and Resilience Bank to finance reconstruction, energy integration and defence and dual-use industry under shared ownership.
- Expand defence-industrial cooperation and joint production across the region and with Ukraine, in ammunition, drones and armoured vehicles.
- Create a regional enlargement adjustment facility, funded partly from immobilised Russian assets, to cushion frontline states against the budgetary effects of Ukraine's accession.
- Deepen military mobility and logistics integration, linking Ukrainian transport networks into the European system.

LONG TERM

- Achieve Ukraine's full integration into the EU and NATO, and turn reconstruction into lasting strategic integration rather than a temporary aid programme.
- Keep the prospect of a Ukrainian success, and not only of a managed settlement, present in the region's public diplomacy, on the analytical grounds that a reversal of Russian pressure would extend well beyond Ukraine, from Georgia to Belarus.
- Build a durable regional security community across the Nordic, Baltic, Polish and Ukrainian space, firmly anchored within NATO and the EU.
- The central strategic insight is straightforward. Ukraine is not simply a neighbour whose security must be protected. **Ukraine is becoming one of the foundations of the future European security order.** The success of its integration will determine not only Ukraine's future but the future balance of power across Europe.

Obstacles and Limitations

- Ukraine's accession risks remaining informally coupled to Moldova's, since Moldova can absorb reforms faster than Ukraine can sustain under wartime conditions. Croatia's experience after 2004, left waiting behind a less prepared cohort, is a warning against subordinating either timetable to the other.
- Individual member states can still couple Ukraine's file to unrelated disputes over budgets, the rule of law or bilateral grievances, exploiting the unanimity requirement that governs every stage of accession. This includes Polish-Ukrainian relations, currently strained by unresolved historical issues, which have contributed to increasingly confrontational positions on both sides and could ultimately undermine Poland's support for Ukraine's bid for EU accession.
- The Ukraine Reserve will compete for the same finite budget as the EU security strategy expected in September 2026. Its scale has to be actively defended through the final stage of negotiation, not assumed to survive on its own.
- A settled regional position becomes a majority inside the Union only with Germany's weight behind it, and that weight has to be drawn in, not simply awaited.

#UnitedWeStand

Defence and International Security

Introduction

For the Alliance as a whole, the assumption that decisive military weight would come from across the Atlantic dates back to 1949. The Nordic-Baltic-Polish region's own relationship with that guarantee is far more recent, and far from uniform. Norway, Denmark and Iceland have held it since NATO's founding. Poland and the Baltic states spent the Cold War on the other side of the Iron Curtain, under Soviet domination. Therefore, they built their entire security architecture after 1999 and 2004 around the American guarantee precisely because they had lived the alternative. Finland and Sweden stood outside NATO altogether until 2023 and 2024 respectively. Whatever the starting point, that guarantee had become the foundation of peace and security for the whole region. However, it can no longer be taken for granted. Washington is increasingly prioritising other theatres while expecting European allies to assume greater responsibility for their own defence. Russia, meanwhile, increasingly treats the Arctic, Baltic and eastern flank as interconnected operational theatres. For the region located closest to the Russian threat, this is not a distant strategic debate but an immediate one.

Deterrence can no longer be inherited. It must be built. It must be built first where the exposure is greatest. That means turning regional

formats into operational military decision-making, and treating the eastern flank and the High North as the single theatre.

There are two goals which stem from one deterrent. The first concerns conventional strength and the architecture of the Alliance itself. It makes the region the vanguard of a stronger European pillar within NATO, defending its own ground from the Suwałki Gap to the Arctic and developing vital military capabilities like drones, counter-drone systems and command capacity that modern war demands. The second confronts a question that conventional strength alone cannot answer – the nuclear gap left by a collapsing arms-control order and by dependence on guarantees the region does not control. It explores how the region could mitigate that gap without crossing the line of proliferation, through conventional deterrence first, a fairer share of the Alliance's nuclear arrangements next, societal preparedness alongside, and a credible long-term hedge held in reserve. Taken together, they describe a region that intends to become a provider of security rather than a consumer of it.

GOAL

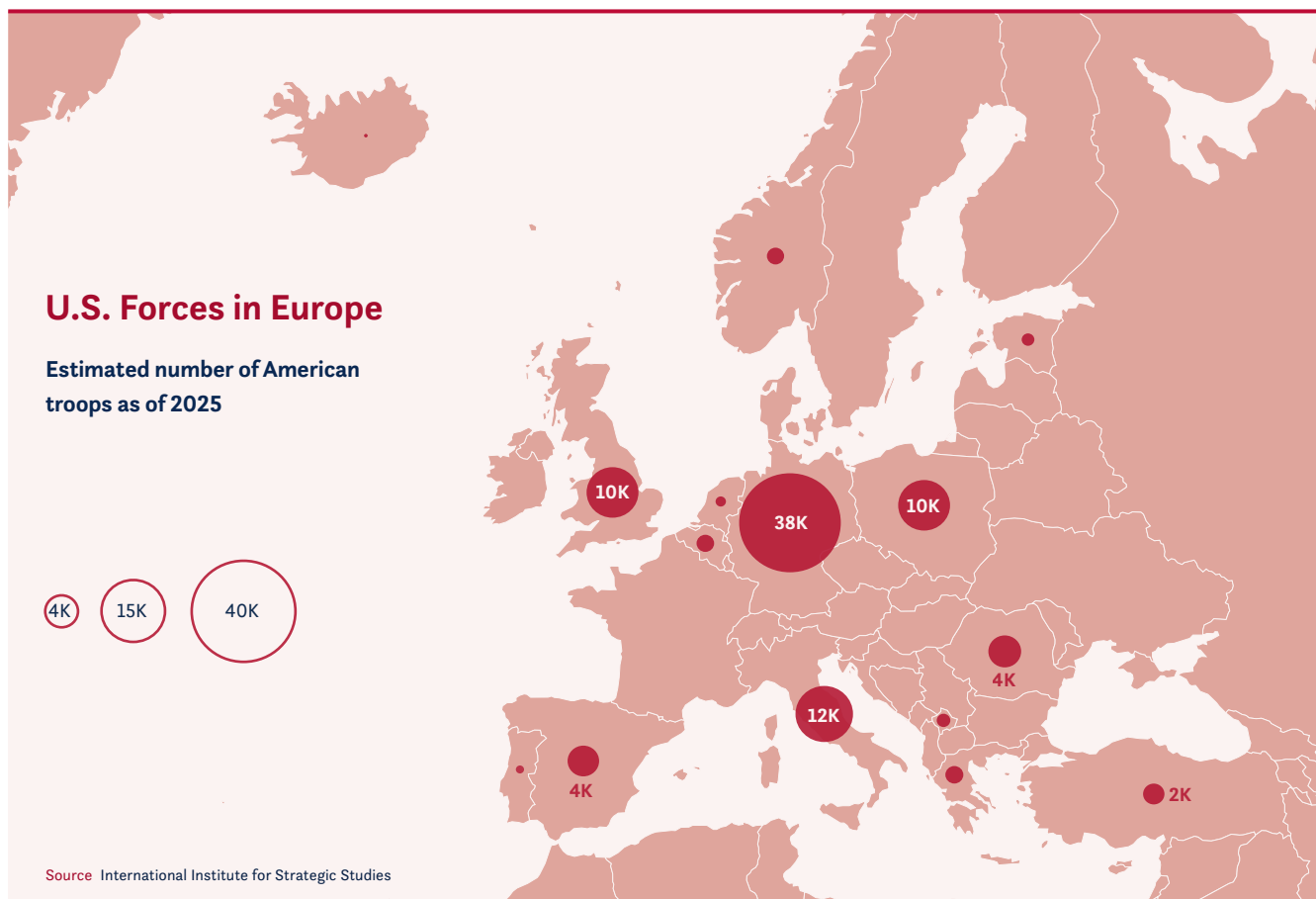
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Build a Stronger European Pillar of NATO

The Umbrella Is Lifting

For much of the post-war era, the security of NATO Europe rested on American military power. Forward-deployed U.S. forces, nuclear guarantees and the Alliance's integrated command structure underpinned deterrence for decades, even if that protection reached different parts of Europe at different times. In 2025, around 80,000 U.S. troops remain stationed across the continent. Yet Washington is increasingly expecting European allies to assume greater responsibility for their own defence as strategic attention shifts toward the Indo-Pacific and other priorities. The American guarantee remains indispensable, but it can no longer be treated as an unlimited substitute for European capability. **The states on NATO's northern and eastern flanks must therefore be prepared to shoulder a greater share of the burden for their own security.**

The drawdown of American support is real, but it is not the whole picture. After proposed cuts, Congress codified and appropriated \$200 million for the Baltic Security Initiative in the defence budget to support air defence and military capabilities along NATO's eastern flank. Furthermore, Senators Lindsey Graham and Richard Blumenthal spearheaded the *Lindsey O. Graham Sanctioning Russia Act of 2026*. The legislation targets top buyers of Russian oil and gas, providing mechanisms to impose tariffs of up to 100% on goods imported from those countries into the United States. The region should frame its message to Washington as a strategic American investment – both Congress and the Administrations are helpful avenues for European leaders.¹⁶



Europe has been under attack since the first days of the 2022 invasion. Sabotage and subversion against allied states quadrupled between 2022 and 2023 and tripled again in 2024.¹⁷ The cumulative effect is to keep the continent in a permanent low-level crisis and to suggest that the old deterrence mechanisms, the American umbrella included, no longer hold against the pressure coming from Russia. As the United States pivots to other theatres, Moscow may come to read Europe as an easy mark, not only for grey-zone operations but for direct confrontation, a reading that NATO's own hesitations have done little to dispel. When Russian fighters crossed into Estonian airspace and Tallinn reached for Article 4, the Alliance's answer was thin.

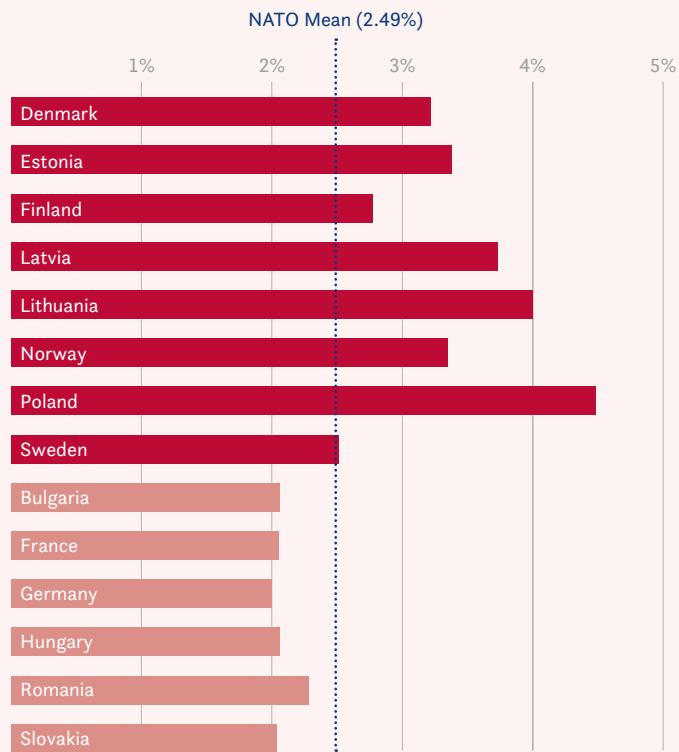
The right response is not to decouple from the United States but to become the partner Washington has asked for: an ally able to defend itself, carrying weight across the Alliance. The Kremlin should come to see any move against Europe as a costly and ineffective gamble, whereas Washington should see the region as a stalwart rather than a drain.

Norway offers the model the region should follow. It has combined deep transatlantic engagement with sustained investment in European and national defence capabilities, demonstrating that a stronger European pillar reinforces rather than weakens the Alliance. The NB8 and Poland are well placed to build on this approach by using their existing regional

formats to strengthen deterrence, deepen military cooperation and keep the United States closely engaged.

The Nordic, Baltic and Polish capitals do not read Washington in the same way. Warsaw's instinct differs from Copenhagen's, so a common line cannot be taken for granted. The region should still work to hold one strategy, treating the United States neither as a fading guarantor to be hedged against nor as a partner whose commitment can be assumed, but as an engaged ally in what the region tangibly does for the common defence. The group's leverage lies in acting as one, in the indispensability of its frontline and in the weight of nine states voting as a bloc inside NATO and the EU rather than as separate delegations. **No other part of Europe combines the same level of threat exposure, defence spending, political cohesion and operational experience. If a stronger European pillar of NATO is to emerge, it is most likely to emerge here.**

Defence expenditure of the North-East Flank of NATO



Source: NATO

One Theatre from the Baltic to the Arctic

The first task is to recognise that the region constitutes a single operational theatre. One of the most persistent strategic errors has been to treat the eastern flank and the High North as separate security problems rather than interconnected parts of the same battlespace. Russia does not make that distinction. Its military posture links Kaliningrad, the Baltic Sea, the Arctic and the Northern Fleet into a single system capable of creating pressure across multiple domains simultaneously.

The implications are clear. Reinforcing the Baltic states depends not only on the Suwałki Gap

but also on secure maritime access across the Baltic Sea. Those sea lines, however, remain vulnerable to Russian anti-access and area-denial capabilities based in Kaliningrad and supported by the Baltic Fleet. Further north, Norway's offshore energy infrastructure and the maritime approaches to the Arctic are equally exposed to disruption, while the Northern Fleet provides Moscow with the ability to threaten NATO across the wider northern theatre. Since Finland and Sweden joined the Alliance, these theatres have become operationally inseparable. Security in the Baltic increasingly depends on developments in the High North, just as stability in

the Arctic depends on the resilience of NATO's eastern flank.

Canada should also play a larger role in the region's security architecture. It already commands NATO's multinational battlegroup in Latvia, which is being expanded toward brigade

strength. Its position as both an Arctic and a North Atlantic power gives it a direct stake in the security of the High North and the Baltic region. Deeper Canadian engagement would strengthen the northern flank and provide greater resilience if the United States reduces its military presence in Europe.

The Sixty-Kilometre Problem

New technology has sharpened the oldest vulnerability. The Suwałki Gap is barely sixty kilometres wide and carries critical links, among them the LitPol electricity connection and the Gas Interconnector Poland-Lithuania. In Ukraine, cheap drones have created a fifty-kilometre death zone in which resupply, evacuation and reinforcement can be struck almost at will, and fibre-optic guided drones now reach that far while shrugging off electronic warfare countermeasures. A piece of infrastructure that

once required significant strike capabilities to destroy can now be neutralised by a drone costing just tens of thousands of dollars. Artificial intelligence is making these systems increasingly autonomous. This further increases the vulnerability of the Suwałki Gap and exposed positions such as Gotland, which must therefore be treated as critical points in the region's defence. The sabotage already reached into the region, including the explosion of a Polish railway line in 2025, is the same campaign by other means.¹⁸

Spearheading Capability Building

The region should make itself the vanguard of this modernisation rather than wait for the whole Alliance to move. The work begins with planning. The NB8 and Poland should turn their meetings into operational decision-making, running regular table-top exercises that bring experts and ministers into the same room and agreeing in advance how to answer hybrid attacks and hostile drones, including when to escalate to kinetic means.

The next priority is control of the airspace over the Alliance's most exposed terrain. Poland and Lithuania should spearhead an integrated air and missile defence zone over the Suwałki Gap, linking sensors, interceptors and command systems into a single operational network. The objective is to create a controlled airspace where hostile drones and other unmanned systems can be detected, tracked and, where necessary, engaged rapidly in both peacetime and during crises.

Selected Military Capabilities of NATO's North-East Flank					
	Self-propelled howitzers	Main Battle Tanks	Rocket Artillery	Combat Aircraft	Military Personnel
Denmark	19	44	8	43	17 300
Estonia	60	0	18	0	7 800
Finland	208	200	75	128	30 800
Latvia	65	0	6	0	9 000
Lithuania	64	44	16	0	19 500
Norway	52	90	16	46	24 800
Poland	687	950	390	128	233 800
Sweden	74	154	0	99	24 900
TOTAL	1229	1482	529	444	368K

Source Collated sources

The region has made considerable progress over the past two years. Low-altitude surveillance has been strengthened through national investments, NATO’s Eastern Sentry mission and the counter-drone package agreed at the 2026 Ankara Summit. The principal weakness is no longer the number of sensors but the lack of integration between them. National and Allied systems still operate largely in parallel, without a standing obligation to exchange data automatically across borders. A sensor that cannot share information beyond its own network delivers only a fraction of its military value.

The priority should therefore be interoperability rather than additional hardware. Low-altitude sensor data should be exchanged in real time and integrated into NATO’s common air picture. Existing solutions, including the SAPIENT open architecture already being adopted by Allied nations, provide a practical basis for achieving this objective without creating new command

structures. The Commission’s proposed European Defence Project of Common Interest could help finance the necessary digital integration. Once established over the Suwałki corridor, this model should gradually be extended across the Baltic region, including Gotland, as part of a fully integrated air and missile defence network.

Technology alone, however, will not be sufficient. Lithuania and Latvia have already introduced legal frameworks that delegate engagement authority and clarify liability for lawful interceptions of hostile drones below the threshold of armed conflict. Similar arrangements should be adopted across the region. Hybrid attacks are likely to begin with drones, sabotage or other ambiguous incidents rather than conventional missiles. Military preparedness must therefore be matched by civil resilience, including clear public communication, contingency planning and closer use of the EU Civil Protection Mechanism.

Military capability is only as credible as the Alliance's ability to reinforce it. Even the strongest forward defence loses much of its value if Allied forces cannot move rapidly across the region. Russia understands this and can disrupt reinforcement through attacks on transport infrastructure, ports, railways and key chokepoints, from the Suwałki Gap to the Baltic Sea.

The European Military Mobility Enhanced Response System and the broader Military Mobility Package are designed to remove regulatory barriers, strengthen critical infrastructure and accelerate military movement across Europe. However, implementation remains slow, while the strategic challenge is immediate. The Nordic-Baltic-Polish region should therefore move ahead wherever possible by coordinating military mobility planning, identifying and eliminating critical bottlenecks, and accelerating cross-border procedures. Ukraine's experience in sustaining logistics under constant attack

provides valuable lessons that should be incorporated into NATO and EU planning.¹⁹

Technology will increasingly determine the balance of military power. The decisive advantage will come less from buying more platforms than from developing better drones, counter-drone systems and artificial intelligence. Russia has already integrated AI into systems such as the Lancet loitering munition, demonstrating how rapidly autonomy is entering the battlefield.

The Nordic-Baltic-Polish region should therefore develop these capabilities together. Joint investment in AI, drones and counter-drone systems would strengthen regional defence while reducing dependence on external suppliers. This also requires secure digital infrastructure, including data centres and resilient energy supplies capable of supporting military AI applications.

Polish Armour in Railway Transit During NATO Exercise "Brilliant Jump"

Source: st. kpr. Marcel Mańkowski, 1. Warszawska Brygada Pancerna



The region should establish a dedicated window within the NATO Innovation Fund for technologies tailored to the Baltic theatre and make full use of Ukraine's offer to train Allied AI models on real battlefield data. Systems developed together are easier to procure together, lowering costs, strengthening interoperability and supporting Europe's defence-industrial base.²⁰

The region also has a proven mechanism for financing common capabilities. The Three Seas Initiative has already demonstrated its value in supporting cross-border infrastructure and strategic connectivity. It should now play a greater role in financing military mobility, dual-use infrastructure and joint procurement programmes, particularly in areas such as long-range fires and counter-drone capabilities. Lithuania's decision to mobilise around €6 billion for defence illustrates both the scale of the challenge and the level of political commitment that the region is prepared to demonstrate. Visible regional investment also strengthens credibility with allies, particularly the United States, by showing that Europe is taking greater responsibility for its own defence.

Maritime security is the final element of this strategy. Russia's hybrid campaign increasingly extends into the Baltic Sea and the High North, where shadow-fleet vessels are used not only to circumvent sanctions but also to support surveillance, intelligence gathering and other hostile activities. NATO's Baltic Sentry has strengthened deterrence, but it cannot provide a permanent presence across the entire region.

The Nordic-Baltic-Polish states should therefore establish a standing maritime task force under the Joint Expeditionary Force. A North-Eastern Seaguard would protect critical undersea infrastructure, monitor shadow-fleet activity and respond to hybrid incidents below the Article 5 threshold. This would also give practical substance to Poland's participation in the JEF while strengthening the Alliance's ability to secure the Baltic Sea and approaches to the High North. The sanctions and interdiction aspects of this proposal are addressed in the chapter on foreign policy and European integration.²¹

Roadmap for Attaining the Goal

SHORT TERM

- Utilise the NB8 and Poland formats for operational decision-making, running regular table-top exercises at expert and ministerial level and establishing a shared framework for responding to hybrid attacks and hostile drones.
- Establish a controlled fly-zone over the Suwalki Gap, led by Poland and Lithuania, with integrated air and missile defence and counter-drone systems, and prepare to extend it to Gotland.
- Build a shared pool of military mobility capabilities, map the chokepoints and press the European Military Mobility Package forward ahead of its 2027 deadline.

**MEDIUM
TERM**

- Integrate air and missile defence and intelligence, surveillance and reconnaissance capabilities and doctrines across the north-eastern flank.
- Jointly develop and procure drones, counter-drones and indigenous artificial intelligence, including a dedicated sub-fund within the NATO Innovation Fund and a partnership with Ukraine to train allied models on battlefield data.
- Scale up joint defence production with Ukraine through permanent industrial partnerships on Allied territory. Ukrainian

firms provide combat-tested technologies and operational experience, while European partners contribute capital, manufacturing capacity and access to EU markets. Governments should remove regulatory obstacles, accelerate certification and establish dedicated financing so that joint projects move quickly from political commitments to production.²²

- Adopt the Military Mobility Package and build the infrastructure behind it, the Enhanced Response System and the trans-European transport network.

**LONG
TERM**

- Operationalise Poland's accession to the Joint Expeditionary Force.
- Establish a joint maritime taskforce, the North-Eastern Seaguard, under the Joint Expeditionary Force, to protect undersea infrastructure, police the shadow fleet and counter hybrid threats at sea.

- Establish the NB8 and Poland as the region's standing guardians of security and deterrence.
- The aim is not a European army in place of NATO. It is to make the Alliance's most exposed flank its strongest through supplemental cooperation formats and therefore offer the United States a worthwhile transatlantic partnership.

Obstacles and Limitations

- The region's military capabilities are growing faster than their integration. Air defence, intelligence, logistics and command systems remain organised largely along national lines, limiting the operational advantages that regional cooperation is intended to create.
- NATO, EU, the Joint Expeditionary Force, the NB8, the Three Seas Initiative and other regional formats often address the same security challenges, yet without a clear division of labour or a mechanism that consistently translates political coordination into operational action.
- Europe's defence-industrial base remains fragmented. National procurement, differing certification standards, slow financing and regulatory barriers continue to delay joint production and cooperation with Ukraine despite broad political support.
- Military mobility and critical infrastructure remain vulnerable to hybrid disruption. Many of the legal, administrative and physical obstacles identified by the Military Mobility Package persist, while Russia continues to exploit the space below the Article 5 threshold through sabotage, cyber operations and maritime coercion.

GOAL

4

Fill the Nuclear Gap

The Arms-Control Order Has Gone

The framework that once managed nuclear risk in Europe has been dismantled. **Almost the entire arms-control architecture of the transatlantic area has largely unravelled.** Since 2000 Russia has left or suspended the Conventional Armed Forces in Europe Treaty, the Treaty on Open Skies and the Intermediate-Range Nuclear Forces Treaty, the Vienna Document is being ignored in practice, and in 2026 New START expired. At the same time, Russia is replacing its losses in Ukraine while modernising its Strategic Rocket Forces, fielding new delivery systems such as Oreshnik, Burevestnik and Poseidon and rearming with Iskander and Kinzhal.

Europe confronts this challenge from a position of dependence. After the Cold War, France and the United Kingdom cut their forces and the United States drew its tactical weapons in Europe down sharply, leaving Russia with a marked advantage in tactical nuclear arms and almost every NATO member dependent on American guarantees for deterrence. That dependence is most dangerous precisely where it is most complete. Washington is increasingly prioritising other regions and asking Europeans to carry more responsibility, and the NB8 states and Poland, which are the most exposed to Russian nuclear blackmail, must answer by strengthening European deterrence.



Russian RS-24 Yars Nuclear-Capable Intercontinental Ballistic Missile

Source: Vitaly V. Kuzmin (CC BY-SA 4.0)

Why Sovereign Weapons Are Not the Answer

The first thing to be clear about is what the region should not attempt. **An independent national bomb is neither lawful nor feasible on any useful timescale.** Building a warhead from scratch would take a state without prior experience somewhere between several and a dozen years and tens of billions of dollars, on top of a civilian enrichment programme and

sovereign delivery systems, with billions more each year merely to sustain it. The legal barrier is still heavier. The 1968 Non-Proliferation Treaty bars non-nuclear states from acquiring such weapons, and a breach would be among the gravest acts against international law. The region's task is therefore to build deterrence without crossing that line.

Conventional Deterrence First

The most immediate answer is conventional. Precision and miniaturisation now let conventional weapons reach the targets, command centres and critical nodes that once required a nuclear strike. This is why even nuclear powers invest heavily in long-range conventional arms, and why South Korea deters a nuclear-armed neighbour with aircraft, rocket artillery and missiles. The Baltic-Nordic-Polish region has begun the same work. Poland fields HIMARS and Chunmoo launchers and several hundred JASSM-ER missiles, with HIMARS also in the Baltic states, M270 and JASSM in Finland, Chunmoo in Estonia and Norway, and Naval Strike Missiles across the region. Together these capabilities can already reach Kaliningrad, much of Belarus and north-western Russia, and the JASSM can strike deep into western Russia. The region should expand this arsenal through joint procurement, building on financing mechanisms that already exist and have been proven

to work. The EU's SAFE instrument provides up to €150 billion in long-maturity loans conditional on common procurement, with Ukraine participating on equal terms. Poland secured the largest allocation, €43.7 billion, and was the first member state to sign its loan agreement, while Lithuania moved from application in summer 2025 to an allocation of €6.375 billion that autumn. Joint applications for new long-range systems, such as the integration of Taurus on the Swedish Gripen, and, in time, for land-based cruise and ballistic missiles such as Tomahawk or Hyunmoo-5, would lower unit costs, anchor interoperability at the contract stage and build the stockpiles behind exercised joint strike operations. Kaliningrad sits as a hostage within range, and the region's strategic communication should leave Moscow in no doubt that any use of a nuclear weapon would be met at once with a massed conventional response.



**HIMARS Missile
System of the Polish
Armed Forces**

Source mł. chor. Daniel Wójcik,
16. Dywizja Zmechanizowana

Nuclear Sharing and the French Offer

Beyond conventional means, two nuclear avenues are open without building a bomb. The first is NATO nuclear sharing, which today rests on perhaps one hundred to one hundred and fifty American B61 bombs in Belgium, the Netherlands, Germany, Italy and Turkey, and from which. All members admitted after the Cold War have been excluded from this programme, Poland's interest notwithstanding. The pretext is the 1997 NATO-Russia Founding Act and its

pledge not to station nuclear weapons on new members' soil – an argument that is absurd now that Russia has repeatedly violated the Act, yet survives because some allies fear Moscow's reaction. **The region should press, patiently and together, to set the Founding Act aside and open nuclear sharing to willing states on the flank.** It will disperse the capability, complicate the aggressor's planning and give the most exposed states a hand in the response that deters it.



The first avenue is to strengthen the region's role within NATO's existing nuclear arrangements. Political and legal barriers that once constrained such participation are disappearing rapidly. Finland's statutory prohibition was lifted through an amendment that entered into force on 1 July 2026. On 7 July 2026, Lithuania's Seimas voted by 89 votes to 11, with six abstentions, to advance to committee a constitutional amendment repealing Article 137, which remains the Alliance's only constitutional prohibition on weapons of mass destruction and foreign military bases. Two parliamentary votes are still required before the amendment enters into force. Once that process is complete, no state on the Nordic-Baltic-Polish flank will face domestic legal restrictions on participating in NATO's nuclear posture.²³

Russia's repeated violations of the 1997 NATO-Russia Founding Act have removed the political rationale for continued Allied self-restraint. The debate should therefore shift from whether

the region may participate more fully in NATO's deterrence architecture to how it should do so.

The second avenue lies in closer cooperation with France. French nuclear forces remain the ultimate guarantee of France's sovereignty and continue to operate under deliberate strategic ambiguity. In March 2026, President Macron expanded this approach through the concept of advanced nuclear deterrence, offering willing European partners, reportedly including Poland, joint exercises and the deployment of French nuclear-capable aircraft on their territory. Several states in the region are already discussing what this cooperation could mean in practice. The proposal stops well short of stationing French nuclear weapons abroad or sharing the decision to use them. Even so, it provides an important opportunity to build operational experience, political trust and strategic familiarity. The Nordic-Baltic-Polish states should actively explore this framework while remaining firmly anchored in NATO's nuclear policy.

Preparing the Society

Deterrence has also a societal dimension. Nuclear weapons work on the imagination – even a single limited or demonstrative detonation, in an uninhabited area or coastal water, could shock a society into pushing for political concessions. Society and state that are visibly prepared for that scenario are a far less attractive target for coercion. The region should rebuild the habits of resilience that were taken for granted during the Cold War. Governments need plans to ensure continuity, relocate decision-making when necessary, evacuate threatened areas and communicate clearly with the public about nuclear risks. The objective is simple: to deny an aggressor any

political or psychological advantage from nuclear coercion. The same preparedness applies below the nuclear threshold, where the public is more likely to encounter it first. Each state should designate a single authority empowered to issue immediate public instructions during air incursions, and exercise its mass-notification channels against drone and missile scenarios likely to occur first. The air alert over Vilnius on 20 May 2026 showed what happens when that responsibility is fragmented across ministries, municipalities and institutions. The population was instructed to take shelter but provided with limited further guidance.²⁴

**Safety Handbook,
Published by the
Polish Government
Centre for Security**

Source: Ministerstwo Spraw
Wewnętrznych i Administracji



The Long-Term Question

Finally, a longer-term question sits behind all of this, and it should be approached with care. A total collapse of the non-proliferation order remains unlikely, and the region has a strong interest in upholding that order rather than weakening it. At the same time, the experience of advanced economies such as Germany and Japan suggests that states with a mature civil-nuclear sector and a deep high-technology base are less exposed to nuclear coercion, because their security does not rest on any threat to leave the

regime. For the NB8 and Poland, the implication is not a programme to acquire weapons but a case for sustaining the civilian nuclear competence, the scientific base and the advanced delivery technologies that already serve their energy systems and their conventional defence, entirely within and in active support of the Non-Proliferation Treaty. The report raises this as a strategic question that the region will have to debate openly, with full attention to its risks, rather than as a direction it recommends.

Roadmap for Attaining the Goal

SHORT TERM

- Keep US extended nuclear deterrence as the anchor of the region's security in the near term, sustaining the spending, host-nation support and political investment that keep it credible.
- Invest heavily in non-nuclear conventional defence, expanding the long-range strike arsenal, cruise and ballistic missiles and long-range drones, acquiring longer-range systems, building stockpiles and exercising joint strikes. It hedges against the gap rather than closing it.
- Record that Finland by statute and Lithuania by constitution are removing the legal constraints on allied nuclear deterrence, and carry that into the case for setting aside the 1997 NATO-Russia Founding Act.

MEDIUM TERM

- Pursue participation in NATO nuclear sharing, working diplomatically and together to set aside the Founding Act, which Russian conduct has emptied of meaning.
- Build societal and institutional nuclear preparedness, continuity of government, evacuation planning and clear public information.
- Strengthen the French and British role in the region's deterrence, examining the advanced-deterrence offer and building toward joint exercises and the hosting of nuclear-capable aircraft.

LONG TERM

- Keep the debate on a common European deterrent open and serious rather than settled by default, since whoever holds the decision must be able to take it on behalf of the flank.
- Build and sustain, entirely within international law and in active support of the non-proliferation regime, the national technological base and civil-nuclear competence that already serve the region's energy systems and conventional defence.
- The aim is to close the gap between the threat the region faces and the deterrence it commands, by conventional means first, by a fairer share of the Alliance's nuclear arrangements next, and by the technological resilience that keeps the region from being coerced, all inside the non-proliferation regime.

Obstacles and Limitations

- Some allies still fear Moscow's reaction to setting aside the Founding Act, which is why the region's push for nuclear sharing has to be patient and collective rather than unilateral.
- Lithuania's constitutional amendment still needs two further parliamentary votes before it takes effect, so the legal path is clearing but is not yet completed.
- The French offer stops well short of stationing nuclear weapons abroad or sharing the decision to use them, and the British force has no sub-strategic option, so this builds trust and experience rather than closing the gap.

#UnitedWeStand

Energy and Resilience

Introduction

The Nordic-Baltic region and Poland are entering a period in which resilience can no longer be understood solely through the lens of military capabilities. **The ability to secure critical infrastructure and maintain access to strategic industrial inputs is becoming equally important.** Energy systems, industrial supply chains and defence preparedness are increasingly interconnected, while vulnerabilities in one domain rapidly translate into risks for the others.

The two advocacy causes presented in this chapter address different dimensions of the same challenge. **The first focuses on protecting the infrastructure upon which modern economies depend. The second examines how the region can strengthen control over the critical mineral value chains required to build, maintain and expand that infrastructure.** Together, they offer a framework for enhancing regional resilience by reducing exposure to disruption, strengthening strategic autonomy and improving the capacity to withstand future crises.

Gas storage terminal in one of the Baltic states

Source: Adobe Stock



GOAL

5

Protect Critical Energy Infrastructure by Design and Deterrence

The New Security Environment

European energy systems have been developed primarily with the market in mind, to increase efficiency and cross-border connectivity and to implement the European Union's energy and climate policies. Resilience of energy systems has been a secondary priority at best. **Since 2022, however, the security environment in Europe and in the Baltic Sea Region in particular has significantly deteriorated.** One manifestation of the degrading security situation is the increasing use of hybrid threat tactics, particularly in the energy sector, where critical energy infrastructure and assets are

targeted with the aim of disrupting their operation. From 2023 to 2026, there have been multiple reported and documented cases of disruption or damage to critical undersea infrastructure in the form of fibre optic cables, energy interconnectors and pipelines. Energy systems and energy infrastructure have ceased to be merely ubiquitous elements of modern societies. Increasingly they have emerged as strategic targets for malign actors seeking to disrupt their operation and act upon existing vulnerabilities, often in disregard of established international norms and national laws.

Reported and documented attacks on critical infrastructure elements in the Baltic Sea from 2023–2026²⁵

- Interconnector
- Fibre-optic cable
- Gas pipeline
- Out of use gas pipeline (Nord Stream 1 & 2)

5 C-Lion

DAMAGE
fibre-optic link was completely severed

REASON
Yi Peng 3's malign activity (suspected anchor dragging)

17–18.11.2024

6 Estlink-2

DAMAGE
interconnector damage leading to outage

REASON
dragging of anchor by Eagle s

25.12.2024

1 Baltic Connector Pipeline

DAMAGE
gas leakage

REASON
dragging of anchor by vessel NewNew Polar Bear

07–08.10.2023

2 Sweden-Estonia (EE-S1)

DAMAGE
cable damage

REASON
dragging of anchor by vessel NewNew Polar Bear

07–08.10.2023

3 Baltic Sea Submarine Cable

DAMAGE
cable damage

REASON
dragging of anchor by vessel NewNew Polar Bear

07–08.10.2023

4 BCS East-West Interlink

DAMAGE
fibre optic damage

REASON
Yi Peng 3's malign activity (suspected anchor dragging)

17.11.2024

7 SWE-POL

DAMAGE
no reported damage

REASON
mapping of the interconnector by a shadow-fleet vessel

26.05.2025

8 Finland Estonia Connection (FEC) 1&2

DAMAGE
outage

REASON
lowered anchor of Fitburg cargo ship

31.12.2025

9 BCS East

DAMAGE
cable damage

REASON
caused by a passing ship

02.01.2026

The salience of the Baltic Sea has become more pronounced as more and more energy assets are developed offshore. Poland exemplifies this transformation, as a growing share of its electricity generation is being concentrated in and around the Baltic Sea through the development of offshore wind farms with a planned capacity of 5.9 GW by 2030 and 11 GW by 2040, alongside the construction of the 3.75 GW nuclear power plant in Kobylno-Lubiatowo.²⁷ It is also investing in assets such as the floating storage and regasification unit in the Bay of Gdansk, which includes onshore infrastructure.

Equally impressive is the investment in the Bornholm Energy Island, a joint Danish and German project, which will create a 3 GW offshore wind hub connecting the island with both Denmark and Germany through two new high-voltage cables. Another example of a joint cross-state project is ELWIND, an offshore wind farm with an HVDC, developed by Estonia and Latvia; to be completed and operational by 2035.

These projects represent only a selection of the largest power generation investments in the region. The region’s total offshore renewable potential has been estimated at 93 GW, while the declared ambition of the energy ministers has been set at 19.6 GW by 2030.²⁸

At the same time, similarly ambitious initiatives are being undertaken in the field of energy interconnectivity.²⁹ Thanks to investments in energy interconnectors, both high voltage direct current and high voltage alternating current links, the Baltic Sea Region is one of the best interconnected areas of the EU.³⁰ The expansion of gas pipeline network, including Baltic Pipe and Balticconnector, has given all countries in the Baltic Sea region access to gas from the North Sea.

The scale of ongoing energy investment in the Baltic Sea has heightened the strategic importance of the region while simultaneously generating new vulnerabilities. These are driven by the physical exposure of infrastructure in a confined and shallow sea³¹, the technological complexity of interconnected energy systems, congested maritime traffic³² and fragmented governance frameworks. All of these create idiosyncratic challenges for critical infrastructure protection in the Baltic Sea.

For the purpose of this report, energy critical infrastructure includes critical undersea infrastructure such as interarray cables, datacables, pipelines and interconnectors, offshore energy assets such as drilling platforms, offshore wind farms, offshore substations and floating storage and regasification units, and onshore energy assets such as electricity substations, oil and gas storage facilities, LNG terminals, interconnector landing points and marshalling ports for offshore wind that are connected to offshore or undersea infrastructure.

Change in offshore wind capacity (declared vs. projects in the pipeline)

	Marienberg Declaration	2030 Outlook
Denmark	6.3 GW	1.4 GW
Estonia	1 GW	0
Finland	71 MW	70 MW
Germany	3.8 GW	6.9 GW
Latvia	400 MW	0
Lithuania	1.4 GW	400 MW
Poland	5.9 GW	4.9 GW
Sweden	693 MW	190 MW

Source Marienberg Declaration, WindEurope

Vulnerabilities and Gaps

Several challenges and vulnerabilities have been identified as hindering a better response to hybrid threats and their degrading effects on critical energy infrastructure. **The first concerns strategic and institutional cooperation in a region that, from an energy perspective, cannot be viewed as a single system.** It consists of at least two regional energy systems: a better integrated one in the Nordics and one displaying some coordination in the Baltic states and Poland, but in practice there are as many as eight national systems. **The second challenge**

relates to the nature of hybrid threats, where malign actors often exploit legal grey zones, the mismatch between international law and an ever more complex reality on the ground, the problem of attribution and the increasing use of unmanned underwater vehicles that are difficult to detect. **Finally, technical challenges associated with repair timelines and costs, the limited availability of specialised replacement components and the scarcity of dedicated repair vessels further compound the overall vulnerability of the system.**

Uneven Regional Cooperation

Energy security cooperation in the Baltic Sea region has become increasingly dense over the past decade, particularly as it pertains to the development of new projects. One of the most important platforms for political and technical dialogue and coordination is the **Baltic Energy Market Interconnection Plan (BEMIP)**. The framework nonetheless remains constrained by a lack of enforceable implementation provisions. Energy-related cooperation has developed through the Council of the Baltic Sea States and through the European Union Strategy for the Baltic Sea Region.

It was not until the disruptions and damage to critical infrastructure in recent years that **NATO-led initiatives materialised**, namely Baltic Sentry, Task Force X and the Maritime Centre for the Security of Critical Undersea Infrastructure.³³ A key advantage of these initiatives lies in their use of artificial intelligence

to identify potentially malign vessels, including the shadow fleet, and to analyse large datasets. These operations are indispensable, yet they are largely confined to the military domain.

The level of integration across the region remains uneven. **The Nordic countries have developed one of the most integrated electricity markets in Europe**, often cited as a model for regional integration, supported by a dense network of institutions including the Nordic Council of Ministers for Energy, Nordic Energy Research, NordBER and the Nordic Regional Coordination Centre.³⁴

By contrast, energy security cooperation between Poland and the Baltic states remains less institutionalised and is driven primarily by specific projects and political initiatives. The June 2025 Memorandum of Understanding between Poland, Lithuania, Latvia and Estonia on

the protection and resilience of critical energy infrastructure represents an important step towards deeper cooperation. However, it remains at an early stage compared with existing Nordic arrangements. The three Baltic states and Poland have gone further, working on energy security and resilience within the Baltic Energy Security Group. One tangible outcome of this cooperation is joint stockpiling of equipment that can enforce redundancy, followed by the

deployment of unmanned aerial vehicle detection and neutralisation systems.³⁵

Cooperation gaps in energy security in the Baltic Sea region are most pronounced in three areas: **the absence of a joint situational awareness and information sharing framework, the lack of mechanisms for coordinated threat response, and the absence of joint exercises, both table-top and at sea.**

The Nature of Hybrid Threats

A second key challenge stems from the evolving nature of hybrid threats. Malign actors increasingly exploit legal grey zones in the maritime domain, characterised by congested traffic or by exclusive economic zones where state jurisdiction is less clearly defined and more difficult to enforce, operating below the threshold of armed conflict. Existing international legal instruments, including the United Nations Convention on the Law of the Sea (UNCLOS) and earlier conventions such as the Convention for the Protection of Submarine Telegraph Cables,³⁶ were designed in a different geopolitical reality and remain poorly adapted to contemporary hybrid environments.

This challenge is further exacerbated by persistent difficulties in attribution. The subsea environment makes detection more difficult and enables covert operations. Even where advanced monitoring systems are in place, detecting damage is time-consuming. Differentiating between accidental damage, natural hazards

and deliberate sabotage also remains slow and requires investigation.³⁷

An additional and increasingly salient factor is the expanding use of unmanned underwater vehicles³⁸ and other autonomous or semi-autonomous systems. These are often low-cost devices that can cause substantial damage. Malign actors employ a wide range of tools to map, target and disrupt critical infrastructure, including so-called shadow fleet vessels, research vessels and fishing ships, submarines and diving teams. In the cyber domain, attacks on supervisory control and data acquisition systems and other command and control systems are commonly used to disrupt operational continuity, while electronic warfare techniques such as GPS jamming and spoofing add a further layer. Taken together, the exploitation of legal ambiguity, attribution uncertainty and the proliferation of unmanned systems significantly weakens existing deterrence frameworks and obstructs the development of effective and proportionate responses.

**A gas pipeline**

Source: Adobe Stock

Technical Constraints

Repairing critical energy infrastructure is constrained primarily by technical complexity, but also by bottlenecks in global supply chains, specialised equipment availability and vessel capacity. While both fibre-optic cables and interconnectors are technically repairable, their restoration depends on a narrow pool of highly specialised equipment, including spare parts and vessels, and on long lead times for critical components.

A key constraint lies in the limited availability of specialised vessels and repair equipment. The global fleet of cable-laying and repair vessels is small, estimated at around 60 ships, and unevenly distributed.³⁹ Many of these vessels are tied to long-term commercial contracts with telecommunications operators, which means that emergency access is not guaranteed and depends heavily on contractual priority. Repairing undersea HVDC and HVAC links and interconnectors is also a technically advanced process, requiring specialised jointing techniques and heavier handling equipment.⁴⁰ Repair durations may extend over several months depending on

the extent of the damage, environmental and weather conditions, the availability of specialised vessels and technical expertise.⁴¹

Supply chain constraints further intensify these limitations. According to the International Energy Agency, procurement times for key components now typically range from two to three years, while large power transformers may require up to four years, with certain HVDC-specific components facing lead times exceeding five years.⁴² The total cost of a critical energy infrastructure asset should include repair costs, but also the cost incurred when the asset is unable to provide its intended service.

In combination, these factors mean that the repair of subsea infrastructure is a system-level logistical challenge. Extended procurement cycles, limited specialised vessel capacity and constrained spare parts availability collectively increase the vulnerability of critical infrastructure, turning relatively localised faults into potentially cascading disruptions across interconnected energy and communication networks.



A high-voltage transmission grid

Source: Adobe Stock

Three main challenges therefore hinder an effective response to hybrid threats against critical energy infrastructure in the Baltic Sea region. First, despite growing cooperation, significant gaps remain in joint situational awareness, information sharing, coordinated threat response and operational exercises. Second, malign actors increasingly exploit legal grey zones, attribution difficulties and a range of

hybrid tools, including cyber attacks, GPS interference and unmanned underwater systems. Third, the repair of damaged infrastructure is constrained by the limited availability of specialised vessels, equipment and spare parts and by long procurement lead times. Together, these factors increase the risk that localised incidents develop into prolonged disruptions with wider regional consequences.

Resilience Through Design and Deterrence

Traditional approaches to critical energy infrastructure protection are no longer sufficient. The approach that has to be adopted should be a comprehensive one that builds resilience

through both design and deterrence. Such a combined approach focuses on four functions, namely preparedness, detection, response and recovery.

Preparedness

The first priority should be to improve regional information sharing and situational awareness. At present, information about suspicious behaviour and potential incidents is unevenly compiled even at the national level in the Baltic Sea region. Norway, for example, has its own approach to critical infrastructure protection, where critical infrastructure operators, public administration, the military and the intelligence services join for classified briefings. In Sweden, the Coast Guard, which has the primary role of monitoring the maritime domain, works in close cooperation with, among others, the Police, Customs, the Swedish Agency for Marine and Water Management and the Swedish Transport Agency.⁴³ In Poland, legislation is under review to create a Maritime Security Centre, a single point of contact for information sharing from different sources.

States in the Baltic Sea region should therefore establish a joint information sharing platform, where liaison officers from all littoral states could exchange information quickly and effectively. These should not be military personnel, as that would duplicate NATO structures. There is already a good model for this in the Nordics: the Nordic Regional Coordination

Centre, although it has recently been emphasised that this centre has certain limitations when it comes to security information sharing.⁴⁴

An information sharing platform would be the first step in building situational awareness. Establishing such a facility would be more arduous because it would need to integrate knowledge and data from a number of institutions, including transmission system operators, cybersecurity agencies and intelligence agencies. There are already good examples of how maritime data from different authorities in the EU and EEA states is voluntarily shared between stakeholders, for instance through the Common Information Sharing Environment scheme coordinated by the European Maritime Safety Agency. One can think about using the already established frameworks such as BEMIP or integrating the work of the Nordic Regional Coordination Centre and the Baltic Energy Security Group, to add an energy security situational awareness layer drawing on data that is already available. Especially given that BEMIP's third declaration of May 2025 has enhanced cooperation on critical infrastructure protection and already established senior official and technical levels of collaboration. A first

step in this direction would be a table-top exercise (similar to the ones organised by HELCOM – BALEX DELTA) based on real scenarios for high-level participants, in which ministers of energy and ministers of defence, along with any other relevant stakeholders including coast guards,

critical infrastructure operators and regulators, conduct a joint exercise to better understand each other’s responsibilities, competences and challenges. Creating a separate format solely for the purpose of enhancing situational awareness may be redundant.⁴⁵

Detection

The protection of critical offshore energy infrastructure has increasingly attracted the attention of policymakers and security practitioners. Recent discussions have highlighted the impor-

tance of strengthening capabilities for the detection and monitoring of hybrid threats, particularly in relation to critical infrastructure nodes such as offshore substations, junctions,

Cost of disruption, damage and repair of critical infrastructure

Offshore infrastructure type	Direct repair/ restoration	Estimated disruption loss	Estimated outage/ repair period	Estimated total loss per major incident
Subsea telecom cable	~€583 550 – 1 167 100	€24 million/day	7–24 days	~€168–576m
Electricity interconnector /HVDC cable	~€10–100m; EstLink 2 incidents were ~€30m and €50–60m	€12 million/day	40–60 days	~€480–720m
Offshore wind export cable	Included in combined loss	~€421 thousand/day (500 MW wind farm)	~60 days average (DNV, 2024)	~€8.6–25.7m (repair + lost generation)
Offshore wind array cable	Included in combined loss	–	~40 days average	~€1–10.3m
Subsea oil pipeline	Asset specific	€36 million/day	5–9 months	–
Subsea gas pipeline	Balticconnector repair: ~€40m	€75 million/day	5–9 months	~€11.3–20.3bn

Source International Cable Protection Committee, RAND Europe, DNV, YLE, HVDC World.⁷⁷

cable crossings and onshore interconnector landing points. These assets are generally prioritised by infrastructure operators because of their operational value.

The development of enhanced surveillance and monitoring systems aims to integrate data from a wide array of technologies, including seabed sensors, underwater vehicles and unmanned

underwater vehicles, satellite surveillance, vessel-tracking systems and artificial intelligence detection tools. The implementation of these measures nonetheless remains contingent on economic considerations. The extent to which operators adopt such solutions is likely to depend on the balance between the cost of surveillance and the potential cost associated with infrastructure damage and repair.

Response

At the legal level, the various provisions of UNCLOS, often criticised for not providing efficient clauses to protect critical infrastructure, should be re-examined both nationally and regionally. There are certain provisions in UNCLOS that could be used more effectively by littoral states to exert their rights in exclusive economic zones. As a framework convention, UNCLOS grants states a degree of discretion in regulating activities within their exclusive economic zones to safeguard their sovereign rights. In this context, it has been suggested that critical infrastructure such as fibre optic cables or energy interconnectors may fall

within the scope of economic exploitation under Article 56, thereby providing a basis for enhanced protective measures.⁴⁶ Attention has consequently focused on Article 60, which permits the establishment of safety zones around installations and structures in the exclusive economic zone, allowing coastal states to impose operational restrictions and enforce compliance. Although such measures would provide only a partial solution, they are likely to be more politically feasible than the negotiation of new international legal agreements, given the increasingly polarised nature of international cooperation.

Recovery and Redundancy

Resilience also depends to a large extent on the ability to recover rapidly when disruptions occur. Infrastructure operators should therefore implement redundancy and rapid-repair frameworks designed to minimise the consequences of both accidents and deliberate attacks.

Priority should be given to critical infrastructure components that are essential for system operation or difficult to replace, particularly given that lead times for key equipment run to years rather than months. Recent discussions have emphasised that European energy systems are underprepared for prolonged or repeated disruptions, owing to limited substations, fuel stockpiles and rapid-response capacity, with industrial bottlenecks further constraining repair capabilities.⁴⁷ One way to mitigate this is to focus on pre-positioned spare

cables, standardised joints enabling 5 to 10 kilometre section replacement, and shared repair vessels, thereby reducing repair time and cost. The repair of the Balticconnector pipeline, for example, took seven months.⁴⁸ A positive development in this area is the EU's recent toolbox for supporting subsea cable security and investing in joint repair vessels.⁴⁹ The downside is that the requirements of HVDC and HVAC cables are more rigorous, and the EU's proposal falls short of addressing this gap.

While immediate security measures are necessary, the ultimate objective should be to ensure that critical infrastructure remains operational during prolonged crises or wartime conditions. This requires moving beyond infrastructure protection towards developing wartime resilience.

Emergency towing of the ship Phantom

Source: Swedish Coast Guard Media Gallery



A key lesson from the war in Ukraine for critical energy infrastructure resilience is the combined importance of stockpiling and technical standardisation. Ukraine's establishment of a national strategic transformer reserve highlights the value of future regional stockpiling cooperatives, rapid deployment protocols and cross-border storage to enhance deployability in crisis conditions. At the same time, the conflict has reinforced that the standardisation of key components, such as transformers and substation equipment, is essential for reducing supply chain vulnerabilities and accelerating repairs. The work of the Baltic Energy Security Group, which already works at stocksharing critical devices and elements needed for electricity grid repair, is a positive example

that should be extended to all NATO and EU members on the Baltic Sea littoral.⁵⁰

Resilience must also be reinforced through regular multinational exercises. Beyond table-top simulations, states should conduct cross-sectoral exercises at sea involving infrastructure operators, coast guards, navies, cybersecurity agencies, telecommunications providers and emergency services. Such exercises can reveal operational blind spots and improve interoperability. This is a long-term goal, but it is not enough that NATO conducts its exercises and transmission system operators stress test their grids. There should be far more cross-sector cooperation.

Roadmap for Attaining the Goal

SHORT TERM

- Convene a first high-level table-top exercise that brings energy, defence and interior ministers into the same room around real scenarios, so that the ministries that separately oversee grids, navies, coast guards and police come to understand one another's competences and the gaps between them before a crisis rather than during one.
- Map the critical offshore nodes whose loss would do the most damage, the offshore substations, junctions, cable crossings and onshore interconnector landing points that operators already prioritise, so that surveillance and protection can be concentrated where exposure is greatest rather than spread thinly across the whole seabed.
- Draw up the design of a regional framework for enhanced surveillance and hybrid-threat detection, integrating seabed sensors, unmanned underwater vehicles, satellite coverage, vessel tracking and artificial intelligence tools, while recognising that operators will adopt such systems only where the cost of monitoring is set against the far larger cost of damage and repair.
- Begin a legal review of how the existing provisions of the United Nations Convention on the Law of the Sea can be used more assertively, in particular Article 56 on economic exploitation in the exclusive economic zone and Article 60 on safety zones around installations, since reinterpreting current law is more politically feasible than negotiating new conventions in a polarised international climate.
- Identify the priority components for redundancy and rapid-repair planning, focusing on the parts that are essential to system operation or hardest to replace, given that lead times for transformers and HVDC components can extend for several years.

MEDIUM TERM

- Launch a Baltic Sea Region situational awareness and information sharing platform, under the Baltic Energy Market Interconnection Plan, whose third declaration of May 2025 already extends cooperation on critical infrastructure protection and provides the senior and technical levels on which a dedicated working group could sit.
- Build that platform around liaison officers from each littoral state rather than military personnel, so that it complements rather than duplicates NATO structures, drawing on the Nordic Regional Coordination Centre as a model, while addressing its known limitations on security information, and integrating transmission system operators, cybersecurity agencies, intelligence services and maritime authorities.
- Deploy integrated monitoring for offshore energy infrastructure that fuses satellite, seabed and autonomous systems, concentrated on the priority nodes identified earlier and calibrated to the balance operators themselves strike between the cost of surveillance and the cost of an interrupted asset.
- Establish regional rapid-repair and redundancy frameworks built on pre-positioned spare cables, standardised joints that allow five to ten kilometre section replacement and shared repair vessels, since the global fleet of cable repair ships is small and largely tied to commercial contracts, and a single repair such as Balticconnector took seven months.
- Embed war-proofing into infrastructure design, procurement and system planning, moving beyond protection towards keeping assets operational through prolonged crisis, and drawing on Ukraine's national strategic transformer reserve and its lesson that standardising key components shortens repairs and reduces supply chain exposure.

LONG TERM

- Move from table-top planning to institutionalised multinational exercises at sea that bring infrastructure operators, coast guards, navies, cybersecurity agencies, telecommunications providers and emergency services together, since exposing operational blind spots and building interoperability requires far more cross-sector practice than NATO drills and grid stress tests conducted in isolation.
- Expand regional capacity for rapid repair and resilience through shared repair vessels, regional stockpiling cooperatives and standardised components, building the redundancy that turns a localised fault into a contained incident rather than a prolonged and cascading disruption across interconnected energy and communication networks.
- Develop a mature regional framework for coordinated hybrid-threat response across the Baltic Sea region, closing the three gaps identified at the outset: the absence of joint situational awareness, of coordinated response mechanisms and of joint exercises, so that sabotage below the threshold of armed conflict meets a prepared and collective answer.

Obstacles and Limitations

- Expanding surveillance, monitoring and dual-use capabilities across offshore infrastructure will require substantial investment at a time when defence budgets are already under pressure from rearmament and broader resilience programmes. Sequencing investments and making greater use of common financing mechanisms will therefore be as important as political ambition.
- National legal and regulatory frameworks continue to differ across the region, complicating information sharing, joint operations and cross-border crisis response. Greater interoperability will require common standards, shared procedures and regular joint exercises alongside new infrastructure.
- The resilience of offshore infrastructure ultimately depends on sustained political commitment to regional cooperation. Without deeper integration of planning, information sharing and operational coordination, technical investments alone will not close the region's most important vulnerabilities.

GOAL

6

Secure the Region's Critical Raw Materials Value Chain

The Industrial Stakes

The Nordic-Baltic region and Poland are entering a period in which the energy transition and European rearmament increasingly rely on the same industrial capabilities. For decades, access to these supply chains was treated primarily as a commercial question. That is no longer the case. Governments are investing heavily in new energy infrastructure while seeking to rebuild defence-industrial capacity after years of underinvestment.

Both objectives depend on industrial activities that Europe does not yet control sufficiently. The principal bottleneck is often not extraction but processing. A material can be mined in Europe and still pass through facilities located elsewhere before reaching European manufacturers. This leaves governments exposed to disruptions over which they exercise little influence. The question is therefore not only

whether resources are available, but whether the industrial capacity required to convert them into usable products exists within Europe.

For the NB8 and Poland, this issue carries particular strategic importance. Russia's invasion of Ukraine accelerated efforts to strengthen energy security and exposed the risks associated with strategic dependencies. At the same time, governments across the region have increased defence spending and expanded domestic industrial capacity. These developments rely on many of the same materials, including copper, rare earth elements and battery metals. They also depend on processing facilities capable of transforming raw materials into industrial inputs. As a result, vulnerabilities in critical mineral supply chains increasingly affect both economic resilience and defence preparedness.

Application of Critical Raw Materials in various sectors

							
	Wind turbines	Solar photovoltaics	Heat pumps	Li-ion batteries	Electrolyzers	Fuel cells	Electric traction motors
Aluminium/bauxite	✓	✓	✓	✓	✓	✓	✓
Antimony		✓					
Arsenic		✓					
Baryte					✓		
Borates / Boron	✓	✓	✓		✓	✓	✓
Chromium	✓					✓	
Cobalt	✓			✓	✓	✓	
Copper	✓	✓	✓	✓	✓	✓	✓
Fluorspar		✓	✓	✓			
Gallium		✓					
Germanium		✓					
Hafnium							
Heavy rare earth elements (HREEs)	✓		✓		✓	✓	✓
Indium		✓					
Light rare earth elements (LREEs)	✓		✓		✓	✓	✓
Lithium				✓		✓	
Magnesium					✓	✓	
Manganese	✓		✓	✓	✓	✓	
Natural graphite				✓	✓	✓	
Nickel	✓	✓	✓	✓	✓	✓	
Niobium	✓			✓	✓		
Phosphorus		✓		✓			
Platinum group metals (PGMs)			✓		✓	✓	
Scandium					✓		
Silicon / Silicon metal	✓	✓	✓	✓	✓	✓	✓
Silver		✓				✓	
Strontium					✓	✓	
Tantalum					✓		
Tellurium		✓					
Titanium				✓		✓	
Tungsten					✓		
Vanadium					✓	✓	
Zirconium						✓	

Source Own elaboration, based on data from European Commission and European Court of Auditors⁵¹

Behind all of this stands China. The dependence at issue is above all a dependence on Chinese processing. China refines the vast majority of the world's rare earths and permanent magnets and can turn that position into strategic leverage. At the same time, Beijing has become a key enabler of Russia's war economy. Reuters has reported that Chinese territory has also been used to train Russian personnel, a development publicly confirmed by EU High Representative Kaja Kallas.⁵² This is the harder edge of the two-theatre problem, and it means the United States is not the only external power with a decisive stake in the region's raw-materials base, since Washington too treats this industry as a strategic priority and competes for it. The region's answer should be a common strategy rather than nine national ones.

The region already possesses many of the necessary building blocks. Norway combines advanced battery recycling capabilities with energy-intensive industrial expertise and emerging rare earth projects that could become among the most important future feedstock sources for European processing facilities. Through the EU-Norway Green Alliance, critical minerals and battery value chains have become a central area of industrial cooperation between Norway and the European Union.⁵³ Sweden combines one of Europe's strongest mining and metallurgical bases with significant critical-mineral potential, including lithium, graphite, nickel, cobalt, vanadium and manganese,⁵⁴ and is also meant to become a critical backbone of Europe's rare earths supply.⁵⁵ Finland has developed substantial capabilities in battery materials and metal recovery through companies such as Terrafame,⁵⁶ Keiber⁵⁷ and Fortum.⁵⁸

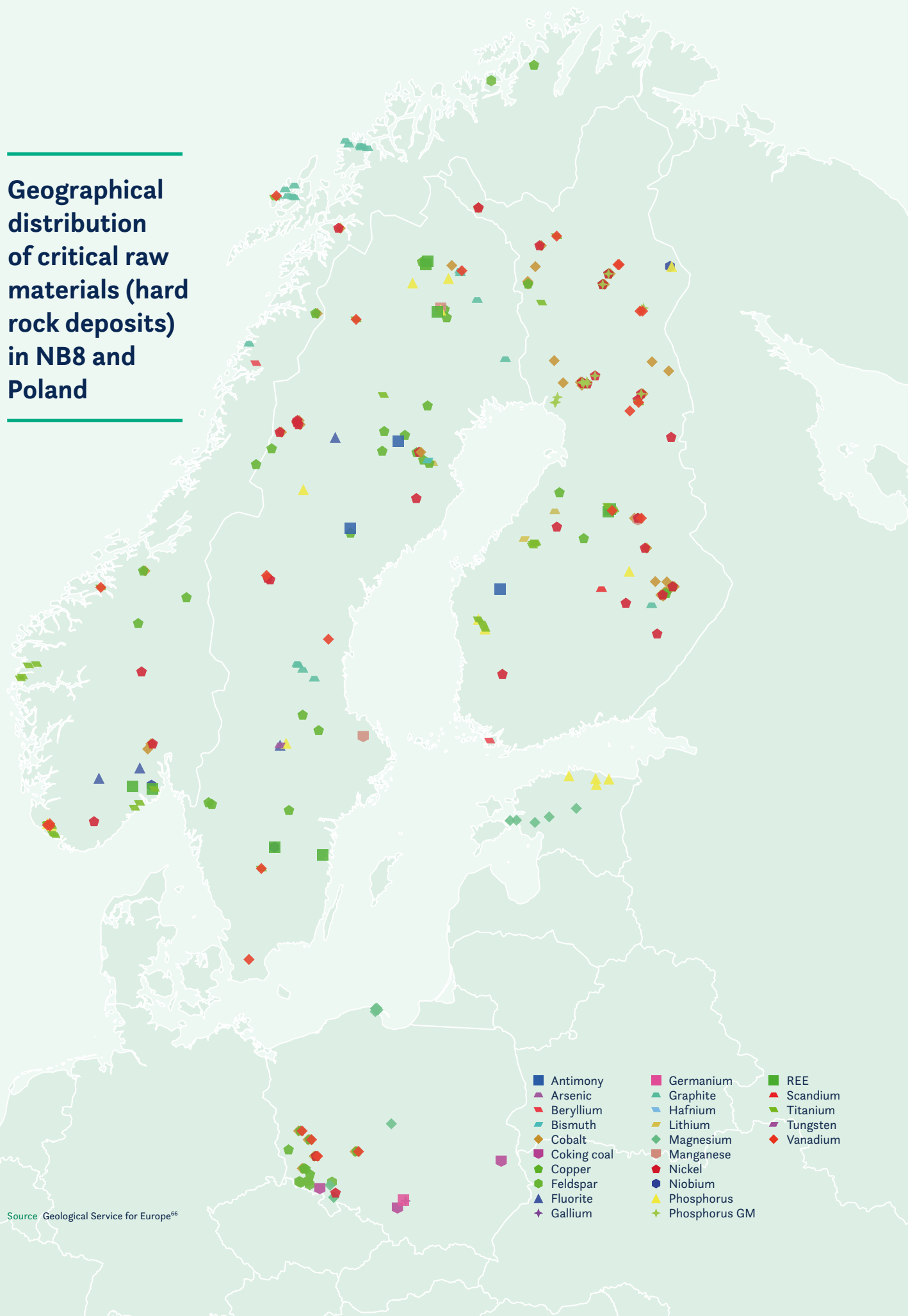
Estonia occupies a distinctive position in the European rare earth value chain through

separation facilities in Sillamäe⁵⁹ and magnet manufacturing in Narva.⁶⁰ Lithuania and Latvia occupy a strategic position on the transport corridor connecting Nordic mineral and industrial assets with Poland and the rest of Europe. The ports of Klaipėda, Riga and Ventspils,⁶¹ alongside Rail Baltica, give both countries a role in the movement of materials between extraction, processing and manufacturing sites across the region.⁶² Estonia's separation and magnet capacity is among the largest anywhere outside China, which is why the idea of a regional rare earth and magnet development centre, anchored in Estonia or shared across the region, deserves to be taken up as a concrete common goal.

Poland contributes one of Europe's largest battery manufacturing bases in the Silesia region and holds some of the continent's most significant copper resources. KGHM, a state-controlled mining champion, has evolved into a global producer with operations on three continents.⁶³ Elemental Holding, a privately owned recycling group supported by public financing from Poland and the European Union, has expanded into 35 countries, including the United States, through its focus on battery materials and the recovery of critical minerals from secondary sources.⁶⁴ Planned rare earth separation capacity in Puławy could further strengthen Poland's position within European critical mineral value chains.⁶⁵

Viewed individually, these projects respond to national priorities and commercial opportunities. Viewed together, they reveal something else. The region already contains many of the industrial stages required to build more resilient supply chains for critical materials. The principal challenge is that these stages are rarely planned as parts of a shared regional system.

Geographical distribution of critical raw materials (hard rock deposits) in NB8 and Poland



Source Geological Service for Europe⁶⁶

A Region of Projects Without Connections

The Nordic-Baltic-Polish region does not suffer from a shortage of projects, but from a scarcity of mechanisms capable of connecting them. The European Union's 2024 Critical Raw Materials Act has established European objectives for extraction, processing and recycling. It has also created incentives for strategic projects and highlighted the risks associated with excessive dependence on a small number of suppliers. Yet, some three years before the Act's implementation deadline, progress is far from what was expected. Project delivery remains constrained by permitting, financing and weak coordination between national pipelines. Several European analyses warn that the Act's targets will not be reached through legislation alone.⁶⁷

Six of the NB8 countries are European Union member states and are directly covered by the Act. Norway and Iceland are outside the Union but inside the European Economic Area. They are not formally bound by the Act in the same way as Union members unless relevant rules are incorporated into the Economic Area framework, yet their industries are increasingly aligned with European critical minerals policy. Norway is especially relevant because its mineral strategy explicitly links domestic production, faster permitting and cooperation with European value chains.⁶⁸

This pattern can be observed across several sectors. A battery manufacturer in Poland may ultimately depend on materials recovered in Finland or Norway, yet investment decisions are still assessed mainly through national industrial strategies. Sweden and Norway are advancing projects that could provide future rare earth feedstock. Estonia already hosts facilities capable of separating rare earth materials and manufacturing permanent magnets. Despite these complementarities, no framework systematically links upstream projects with

downstream users before major investment decisions are taken.

The problem is especially visible in secondary materials. Secondary streams, especially battery waste and recovered magnets, are becoming increasingly important sources of strategic materials. The rules governing these streams nonetheless remain fragmented. Companies operating across borders frequently encounter different approaches to waste classification and liability. Technical testing and transport rules add another layer of complexity.

So-called black mass provides a useful example. When a lithium-ion battery reaches the end of its life, it is first made safe and mechanically processed. This produces a dark powder known as black mass. It contains valuable materials, including lithium and graphite, alongside other recoverable inputs. These materials can then be recovered through chemical processing, often hydrometallurgy, which uses liquid solutions to separate metals.

The region possesses facilities capable of handling batteries at several stages, from collection to metal recovery. What is missing is a predictable regional market. A shipment moving between two countries may be subject to different sampling requirements, different interpretations of waste legislation and different contractual arrangements. These differences increase costs and discourage long-term investment.⁶⁹ Delays and financing pressure mean that near-term planning should still rely on existing capacity. As a result, the region possesses many of the industrial capabilities required to strengthen European supply chains, yet continues to treat them as separate national initiatives. Without a mechanism that connects projects across borders, opportunities for scale and investment will remain underused.

**Iron-ore mine
towering the city
of Kiruna**

Source: Adobe Stock



The NORDMIN Platform

The Nordic-Baltic Critical Minerals and Circularity Partnership (NORDMIN) should serve as a practical mechanism for regional cooperation. Its purpose would not be to create another convening body, but to connect existing industrial assets and identify missing links in regional value chains. It should also allow for the coordination of activities that are difficult for individual governments to undertake alone.

The model should resemble the 2025 UK-France Industrial Strategy Partnership⁷⁶, that is, a political framing rather than a treaty. A joint ministerial declaration, an annual review process and structured industry participation would be sufficient. Technical work should be undertaken by existing institutions wherever possible.

NORDMIN should consist of six workstreams, discussed below. Together, these initiatives would help connect industrial activities that currently operate in isolation and provide a framework for cooperation across the region.

1. Critical Materials Register

The first task should be the creation of a shared register covering industrial assets and material flows, and identifying future demand. The purpose of the register should not be to catalogue geological resources, but to detect how materials move through the regional economy and where bottlenecks emerge.

For battery materials, the register should map the relationship between battery manufacturing in Poland and recovery capacity elsewhere in the region, including hydrometallurgical assets in Finland. The objective should be to understand how material flows could evolve under different demand scenarios.

For rare earths, the register should identify potential connections between extraction projects and separation facilities. It should also link magnet manufacturing with major industrial users. This would allow governments and investors to identify missing stages before investment decisions become difficult to reverse.

The register should also identify projects that may qualify for Critical Raw Materials Act Strategic Project status and those that would benefit from coordinated support from public financial institutions.

2. Battery Circularity Corridor

Battery recycling offers one of the most practical opportunities for regional cooperation because many of the required industrial assets already exist. Companies across the region already participate in collection, processing, metal recovery, and refining. The challenge is not technical capability but the absence of a predictable regional market.

Today, technical requirements often differ between companies and jurisdictions. Sampling procedures are not always aligned. Assay methods vary. Contractual approaches to contamination, rejected shipments, and liability remain inconsistent. The result is uncertainty for investors and industrial users.

The Battery Circularity Corridor should establish a common protocol for black mass

Visualization of the Eiktyr, largest battery project in Norway

Source: elinorbatteries.com



transactions. It should define how materials are sampled and tested. It should set standards for impurity thresholds, moisture measurement, and chain-of-custody documentation. It should also establish minimum requirements for packaging and transport. Safety and emergency response procedures should remain outside the commercial framework.

The corridor should distinguish between production scrap and end-of-life batteries. Production scrap is generally easier to trace because manufacturers know its chemistry and origin. End-of-life batteries are more variable and present different safety risks. Applying the same rules to both streams creates unnecessary costs and administrative burdens.

NORDMIN should therefore develop separate procedures for production scrap and processed black mass. Battery packs, modules, and cells should remain subject to dedicated safety regulations.

The first phase of the initiative should also produce a model contract for black mass transactions. Standardised provisions on quality specifications and testing procedures would improve market transparency. Clearer rules on title transfer and liability allocation would make long-term commercial agreements, some of which are already sought through open calls,⁷¹ easier to conclude.

3. Rare Earth and Magnet Track

Rare earths represent one of the most significant vulnerabilities in European industrial supply chains. As already noted, the Nordic-Baltic region contains several elements of a potential rare earth value chain. At present, however, these developments are largely pursued through separate national frameworks. This increases the risk that one stage of the value chain advances faster than another. The Rare Earth and Magnet Track should create stronger links between resource developers and processing facilities. It should also involve industrial users before investment decisions are locked in.

If a future mine in Sweden supplies material that is separated in Estonia and ultimately incorporated into magnets for offshore wind turbines or defence applications, the economic viability of each stage depends on the others. Those relationships should be considered early rather than after investment decisions have been made.

The initiative should encourage long-term purchasing arrangements. Industrial partnerships should involve offshore wind developers and defence manufacturers, as well as selected automotive and industrial-equipment producers. Recycling should form part of this effort. Magnets recovered from wind turbines, electric vehicles and industrial motors will become increasingly important as larger volumes of equipment reach the end of their operational lives.

4. NB8+ Materials Dependency Assessment

Demand for critical materials increasingly originates from sectors that do not operate according to the same commercial logic. An offshore wind developer and a defence contractor may depend on many of the same materials, yet their procurement priorities are often different. Commercial projects usually focus on cost and delivery schedules, while defence procurement gives greater weight to supplier reliability and continuity during disruption.

NORDMIN should maintain a materials dependency assessment for the NB8 and Poland, focused on regional supply-chain vulnerabilities. The objective would not be to create another list of strategic materials. The Critical Raw Materials Act and national documents such as Finland's National Mineral Strategy,⁷² Norway's Mineral Strategy⁷³ and Poland's Raw Materials Policy⁷⁴ already identify materials of strategic importance. The added value would lie in identifying regional dependencies that these frameworks do not capture. This includes situations where extraction, processing and end-use are located in different countries, dependence

on a small number of processing facilities, or reliance on transport corridors that connect Nordic and Baltic industrial assets. The assessment would support investment decisions and screening, public procurement and strategic stockpiling, while helping governments prioritise those segments of the value chain where additional capacity, trusted suppliers or greater redundancy are most needed.

5. Strategic Project Pipeline

Many industrial projects encounter obstacles that cannot be solved by individual companies alone. Some struggle to secure financing despite strong industrial demand. Others face permitting delays despite sound technical foundations. In other cases, investors remain reluctant because future customers have not yet been identified.

NORDMIN should maintain a regional pipeline of projects requiring coordinated support. The objective should be to identify bottlenecks early and mobilise assistance where it can have the greatest effect. European Union projects included in the pipeline should receive support in pursuing Critical Raw Materials Act Strategic Project status and in accessing financing from institutions such as the European Investment Bank and the Nordic Investment Bank. The same pipeline should help identify long-term industrial customers. A regional pipeline would also provide governments with a clearer basis for prioritising limited public resources.

6. Trusted Processing Standard

Ownership, cyber security and traceability are becoming increasingly important in industrial decision-making. **The Trusted Processing Standard should establish a common framework for facilities handling strategic materials within the region.** Rather than creating another certification scheme, it should require disclosure of ownership structures and provide a common methodology for verifying the origin of materials. The framework could also identify facilities whose operations depend on processing stages located outside Europe.

Compliance with the standard could be recognised in public procurement and regional funding programmes. A shared framework would make due diligence easier for industrial customers and help strengthen confidence in regional processing capacity. This is much closer to how policymakers and companies actually discuss the issue. Who owns the asset? Where did the material come from? Does the supply chain depend on processing outside Europe? Those are the concrete questions currently driving procurement and investment decisions. A shared standard would make cooperation easier across borders while increasing confidence among industrial users, investors and public authorities.

Shared Objectives

The NB8 and Poland should pursue five objectives through NORDMIN.

- 1

Expand regional processing and refining capacity.
- 2

Increase the recovery of secondary materials.
- 3

Strengthen supply chains supporting defence production.
- 4

Reduce dependence on concentrated external suppliers.
- 5

Among the EU member states in the grouping, accelerate implementation of the Critical Raw Materials Act through regional cooperation.

Roadmap for Attaining the Goal

SHORT TERM

- Launch NORDMIN through a joint ministerial declaration rather than a treaty, following the model of the 2025 United Kingdom-France industrial strategy partnership, with an annual review and structured industry participation, so that the region gains a mechanism to connect existing industrial assets without creating another standing convening body.
- Establish the Critical Materials Register as the platform's first task, mapping not geological resources but how materials actually move through the regional economy, in particular the relationship between battery manufacturing in Poland and recovery capacity such as Finland's hydrometallurgical assets, so that missing stages become visible before investment decisions are difficult to reverse.
- Publish the first Defence and Energy Materials List, recognising that the energy transition and rearmament increasingly draw on the same copper, rare earths and battery metals, so that the materials on which both economic resilience and defence preparedness depend are identified together rather than in separate national exercises.
- Publish a regional black mass protocol covering sampling procedures, assay methodologies, impurity thresholds, moisture measurement and chain-of-custody documentation, with emergency response handled separately so that safety rules are not reduced to a commercial annex, since a shipment crossing two borders today can meet different sampling rules and different readings of waste legislation at each.
- Identify the projects suitable for the Strategic Project Pipeline, the ventures held back by financing, permitting or the absence of identified future customers, so that coordinated support can be directed early to the bottlenecks where it will have the greatest effect.

MEDIUM TERM

- Operationalise the Battery Circularity Corridor so that the recycling assets already spread across the region, from collection to metal recovery, can function as a single predictable market, with separate procedures for production scrap and end-of-life batteries whose condition, ownership history and safety risks differ, rather than a framework that treats the two identically and adds needless cost.
- Coordinate applications across the grouping for Critical Raw Materials Act Strategic Project status and for financing from institutions such as the European Investment Bank and the Nordic Investment Bank, so that the region advances complementary projects together rather than competing national pipelines, three years before a deadline that legislation alone will not meet.
- Develop the Trusted Processing Standard as a common framework for facilities handling strategic materials, requiring disclosure of ownership and a shared method for verifying where material comes from and whether a supply chain depends on processing outside Europe, recognised in public procurement and regional funding so that due diligence becomes easier across borders.
- Build the Rare Earth and Magnet Track by linking resource developers, separation facilities such as those in Estonia and industrial users before investment decisions are locked in, since a Swedish mine, Estonian separation and magnets for offshore wind or defence each depend on the others for their economic viability.

LONG
TERM

- Introduce model offtake and contract templates for selected material streams, with standardised quality specifications and testing procedures and clearer rules on

title transfer and liability, so that the long-term commercial agreements already being sought through open calls become easier to conclude.

- Increase regional capacity for battery materials processing and rare earth separation, the processing stage that is the principal bottleneck, since a material can be mined in Europe and still pass through facilities elsewhere before reaching European manufacturers.
- Expand the regional recovery of materials from batteries, permanent magnets and industrial equipment, the secondary streams that become more important as larger volumes of wind turbines, electric vehicles and industrial motors reach the end of their operational lives.
- Incorporate critical materials into defence procurement planning across the grouping, recognising that defence buyers weight supplier reliability and continuity during disruption more heavily than commercial

projects focused on cost and delivery, and feeding the materials dependency assessment maintained for the NB8 and Poland into investment screening, procurement and stockpiling.

- Develop coordinated approaches to strategic stockpiling where security requirements justify it, prioritising the segments of the value chain where the dependency assessment shows that additional capacity, trusted suppliers or redundancy are most needed.
- Position the Nordic-Baltic-Polish region as a major European centre for critical materials processing and circularity, turning a set of complementary national projects into a shared system that reduces dependence on concentrated external suppliers and strengthens the supply chains behind both the energy transition and defence production.

Obstacles and Limitations

- The first obstacle concerns competitiveness. Processing projects in Europe often face higher operating costs, while financing gaps and weak implementation tools continue to slow delivery of the Critical Raw Materials Act.⁷⁵
- The second concerns permitting and public acceptance. Environmental concerns, land-use disputes and local opposition can delay projects even when their strategic value is widely recognised, as demonstrated by rare earth developments in Sweden.⁷⁶
- The third concerns regulatory divergence. Differences in waste regulation, transport requirements, and permitting procedures continue to hinder cross-border cooperation, making common standards for secondary materials essential.
- The fourth concerns market behaviour. Even as supply chain risks grow, many industrial buyers continue to prioritise short-term cost reductions over resilience.
- The fifth concerns timing. New facilities take years to develop, while geopolitical risks evolve rapidly. Projects such as the Narva rare earth magnet plant and the Puławy separation facility demonstrate progress but also highlight the scale of the challenge.

Conclusions

From a Frontline Region to a Strategic Actor

The central argument of this report is that the Nordic-Baltic-Polish region should no longer be understood merely as NATO's frontline. It should be recognised as one of the principal strategic actors shaping Europe's future security order.

The war in Ukraine has accelerated a transformation that was already underway. The Baltic Sea, the High North and the eastern flank have become increasingly interconnected theatres. Energy security, military mobility, critical infrastructure protection, deterrence,

enlargement and resilience can no longer be treated as separate policy domains. **They form a single strategic space.** The states of the region possess many of the ingredients required for leadership, growing military capabilities, strong political cohesion, strategic awareness, economic resilience and a shared understanding of the Russian threat. What remains missing is a more coherent institutional framework capable of translating these advantages into sustained strategic influence. The challenge is therefore **no longer coordination, but organisation.**

From Formats to Machinery

The region already possesses a dense network of cooperation mechanisms. The Nordic-Baltic Eight, the Joint Expeditionary Force, the Northern Group, the Council of the Baltic Sea States and the Three Seas Initiative all contribute to regional security. **The objective is not to create new organisations.** It is to assign clearer responsibilities, strengthen political ownership and transform existing formats into a coherent strategic ecosystem.

The Council of the Baltic Sea States should become the principal platform for resilience, critical-infrastructure protection, hybrid-threat

coordination and sanctions enforcement, a direction already set by its recent reform debate. **The Joint Expeditionary Force** should evolve into the region's primary operational framework for military cooperation and crisis response, with Poland's accession to it as the single headline operational step. **The Northern Group** should support defence planning and capability coordination. Together, these frameworks can provide the foundations of a more coherent regional architecture. Successful architecture, however, requires institutions capable of maintaining strategic continuity between crises and political cycles.

The Institutional Pillars

The report therefore proposes a small and deliberately limited number of additions, five institutional pillars, each with a clear task.

- **An annual Nordic-Baltic-Polish Leaders' Summit**, which sets the region's strategic direction at the highest political level and gives the Group a single, visible voice once a year.
- **An annual Foreign and Defence Ministers' Meeting**, which turns that direction into coordinated foreign and defence policy and prepares common positions between summits.
- **A permanent regional secretariat**, a small standing body that maintains continuity between meetings, prepares the agenda and tracks whether decisions are actually implemented.

- **A Joint NATO Coordination Mechanism**, which aligns the region's positions ahead of Alliance summits and ministerial meetings so that it acts as a bloc rather than as separate delegations.
- **A Joint EU Agenda Mechanism**, which coordinates the region's action inside European institutions on the files that matter most to it, enlargement, the budget, energy and resilience.

The guiding principle is restraint. The region does not need a proliferation of new institutions, and the rule throughout is to work through the formats it already has rather than add to them. These pillars, together with the flagship initiatives that follow, are the considered exceptions, each included only because it carries a coordinating function that no existing format performs today. They would not duplicate existing institutions but connect them, strengthening coordination, improving implementation and ensuring continuity across political transitions.

The Three Flagship Initiatives

Three flagship initiatives should form the backbone of the region's long-term strategy.

A Nordic-Baltic-Polish Strategy Centre would bring together leading regional think tanks, research institutions and policy experts to provide continuous strategic assessment, monitor developments across the wider region and support coordinated policymaking. Its role would be to maintain a common strategic picture and prevent the fragmentation of analysis across national capitals.

To keep this analytical core alive between crises, the region should also give it money of its own. A dedicated regional fund, built on the model of the International Visegrad Fund that has sustained think tanks and civil society across Central Europe for almost two decades, would finance a standing network of Nordic, Baltic and Polish institutes, connect it to the Northern European platforms already forming in Brussels, and draw in newer voices such as

Iceland's first independent think tank with its focus on the Arctic. Resources, not enthusiasm, have been the missing ingredient, and a modest common fund would supply them.

A Nordic-Baltic-Polish-Ukrainian Reconstruction and Resilience Bank would finance reconstruction, dual-use infrastructure, military mobility, energy integration and defence-industrial cooperation. By creating shared ownership of strategic assets, it would transform reconstruction into a long-term instrument of deterrence and integration.

A Regional Shadow Fleet Interdiction Cell working through the Council of the Baltic Sea States and relevant maritime authorities, would coordinate monitoring, sanctions enforcement and maritime security operations, helping transform sanctions from declarations into practical instruments, and building on the surveillance model NATO established with Baltic Sentry.

A Wider Strategic Community

The vision outlined in this report extends beyond the current membership of the Group. The United Kingdom remains an indispensable security partner through the Joint Expeditionary Force and its broader role in European defence. Canada represents a natural partner in Arctic, Atlantic and transatlantic affairs. Germany belongs in the same core, its troops anchoring the

eastern flank and its weight drawn in bilateral and multilateral formats. Ukraine stands at the centre of the region's future strategic architecture. The long-term objective should therefore be the development of a wider security community connecting the Nordic, Baltic, Polish and Ukrainian space while remaining firmly anchored within NATO and the European Union.

The Strategic Deliverables

To translate vision into action, the region should pursue the following deliverables over the next five years, sequenced by priority. The first tier builds the political and analytical core, the second adds standing institutions, and the third tackles the longer-horizon instruments.

The table also distinguishes deliberately between what the region can decide and deliver on its own and what depends on the agreement of others, so that ambition is matched to what lies within the group's control.

Deliverable	Lead institution
Tier 1, foundations, by 2027	
Poland's accession to the Joint Expeditionary Force	JEF member states
Establishment of a Nordic-Baltic-Polish Strategy Centre	Regional think tanks
Creation of a Joint NATO Coordination Mechanism	Foreign and Defence Ministries
Creation of a Joint EU Agenda Mechanism	Member state governments
First Annual Nordic-Baltic-Polish Leaders' Summit	Participating governments
Establishment of a Regional Shadow Fleet Interdiction Cell	CBSS and littoral states
Tier 2, institutions, by 2028	
Creation of a Permanent Regional Secretariat	Participating governments
Launch of the Reconstruction and Resilience Bank	Governments and financial institutions
Tier 3, longer horizon, by 2029	
Establishment of a Regional Enlargement Adjustment Facility	EU and participating governments
Full operationalisation of regional hybrid-threat coordination	CBSS and NATO partners

Carrying the Message Outward

A region that looked only northward and eastward would miss half the political task. The resilience it wants written into the next EU budget, and the enlargement it wants accelerated, will be decided by majorities that include the south – therefore, sustained dialogue with Spain, Italy and France is a requirement rather than a courtesy. The same discipline applies

towards Washington. The strategy will hold only if the region presents itself as a frontline group of NATO member states that strengthens the Alliance, rather than as a regional bloc set against an unreliable partner. Message discipline is itself a security measure, because the adversary's central aim is to turn allied differences into open division.

The Single Argument

Taken together, the six goals presented in this report form a single strategic proposition. Europe's future security order will not be determined solely by the outcome of the war in Ukraine. It will also be shaped by the ability of frontline democracies to organise themselves politically, militarily and economically for a prolonged period of strategic competition. The Nordic-Baltic-Polish region possesses the capabilities, legitimacy and political will required to play that role.

The argument of this report can be stated simply. The Nordic-Baltic-Polish region is no longer the edge of Europe's security. It is becoming one of the places where that security is decided.

For a generation these states were treated as the ground a European order would have to defend. They are now among the actors that will shape what that order will become. They hold the longest frontier with Russia and Belarus, the fastest-growing defence effort in the Alliance, the energy and logistics network that

keeps Ukraine in the fight and a reading of the threat that the rest of Europe has slowly come to share. What they have lacked is not capability or conviction but the habit of acting as one, and the task now is to turn coordination into strategy, strategy into institutions and institutions into lasting influence.

The future of European security will not be written only in Brussels, Berlin, Paris or Washington. Increasingly it will be written along the line that runs from Reykjavík through Oslo, Copenhagen, Stockholm, Helsinki, Warsaw, Vilnius, Riga and Tallinn. What that line now needs is to speak with one voice and to be heard.

From a frontline region to a strategic actor is therefore not a slogan but a description of work already begun. The region's red line remains what it has always been, **no new Yalta**. Its ambition should now be stated with the same clarity, to help build a stronger, more resilient and more secure Europe from the High North to the Black Sea.

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