



Baltic and Nordic States Assess the Russian Military Threat

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The newest intelligence reports by the Baltic and Nordic states jointly warn about the aggressive intentions and reconstitution of Russia's armed forces. All of the documents assume the successful implementation of plans for larger Russian land and airborne forces till the end of 2026. However, these reports differ in the estimates of when the political moment and Russia's conventional capabilities may permit it to initiate open conflict with NATO. Despite their informational and analytical contents, these reports may affect the Baltic region states' capabilities development plans and their decisions about whether to increase defence spending.

Baltic and Nordic states have published annual, unclassified threat assessments since December 2024. These reports were compiled by the military intelligence services of Estonia (VLA), Norway (E-tjensen), Finland (PVTIEDL), Denmark (FE), and Sweden (MUST), the civilian Office of Constitution Protection of Latvia (SAB), and both the civilian and military service of Lithuania (VSD and AOTD). Apart from the [sabotage campaign against partners of Ukraine](#) described by in these reports, it is worth comparing their fragments and chapters dedicated to Russia's military intentions and capabilities.

Similarities in Estimates. The newest reports agree that Russia's war against Ukraine is part of a strategy aimed at breaking the unity of Western countries and changing the security architecture in Europe based on NATO. The priority for Russia is to end the war on conditions most favourable to it. Despite its military and other advantages over Ukraine, Russia lacks the capacity to fulfil its maximum goals, such as recognition of territorial gains, influence over government in Kyiv after a change of the political system, and disarmament of Ukraine (so-called "denazification and demilitarisation"). All of these intelligence documents agree in their conclusions that as long as this war continues, Russia's total capabilities to engage in a conflict with NATO are seriously limited. Russian plans against the Alliance are also

complicated by [the recent NATO enlargement to Finland and Sweden](#).

The intelligence services of the Baltic and Nordic states are taking seriously Russia's plans for a reconstitution and strengthening of its conventional capabilities by the end of 2026. These include an increase in Russia's armed forces from the current 1.15 million to 1.5 million personnel, with an additional 350,000 troops in the land and airborne forces. The reports assume the realisation of plans according to Russia's schedule, with the priority on both existing and new units in the neighbourhood of the Baltic states, Finland, and Norway. The Russian plans for the Leningrad and Moscow military districts foresee tripling the number of artillery systems among new units there.

The Baltic and Nordic intelligence analysts stress that Russia has preserved the capabilities for conventional and nuclear strikes against targets in Europe. The potentials of Russia's Baltic and Northern fleets, as well as its Aerospace Forces are almost these same as in 2022, and in contrast to unprecedented losses in troops and equipment of its land forces in Ukraine. Similarities in the conclusions extend to the issues of the Russian economy and society's militarisation. The newest reports agree that the nuclear threats by Russia towards NATO are more psychological than an actual determination to strike with nuclear

weapons. This kind of blackmail backed by the changing of Russian [official nuclear doctrine](#) and progress in the [modernisation of its nuclear arsenal](#), meant to make the threats more credible. Moreover, all reports devote attention and space to Russia's strengthening cooperation [with China, Iran, and North Korea](#). They also stress the importance of Chinese dual-use equipment and materials for the continuation of Russia's war with Ukraine and implementation of its armed forces reforms.

Differences in Estimates. The intelligence reports differ, however, in their conclusions on Russia's capabilities to continue the military conflict with Ukraine, including the estimated resilience of both Russia and Ukraine, as well as the prospects for any peace talks. Danish intelligence warns that even a small [reduction in the levels of assistance to Ukraine](#) might weaken its military and result in more territorial losses. According to Norwegian intelligence, Russia would not be able to continue the war after 2025, if not determined with higher human and materiel costs. E-tjensen estimates also that the currently strong negotiating position of Russia may weaken by the end of this year or in 2026. Lithuanian intelligence estimates that Russia is able to finance the war at the [current level of army and security spending](#) (at a minimum of 40-41% of federal budget and 6.3% GDP) or even increase these in 2026. The Estonian report concludes that the "war boom" in the Russian economy will end in 2025. The Latvian SAB estimates that Russia might be able to maintain this burden until 2027, although it may be difficult and risky for Russia in the long term, so it may be worth forcing it into some pause in the war with Ukraine and delay a confrontation with NATO. Swedish intelligence stresses in this context that Russia's strategic ambitions will take the priority over its economy or living standards.

While the intelligence reports agree on the growing threat and prospects for rebuilding Russia's land forces, they differ on the time horizons for its readiness for a potential conflict with NATO. The MUST report emphasises that Russian elites will decide the matter based on "their own logic and assessment of the situation" in the region. Finnish intelligence indicates that Russia's combat readiness will be sufficient by the end of 2026 for such a conflict. The report by FE concludes that Russia may be ready only in 2027, while E-tjensen assumes that in the same period, Russia's land forces will still have serious armament shortages. Estonian intelligence predicts a credible threat of Russian aggression against NATO is more likely in the period of 2028-2030. The Danish and Lithuanian estimates are less clear, indicating a growing threat from Russia along the reconstitution of its potential, experience gained on the battlefields in Ukraine, and higher willingness to risk conflict with NATO countries.

The Baltic and Nordic intelligence services also differ in the scope of estimating certain issues or details, depending on the direction of military threats from Russia. Nordic reports do not assess explicitly the [military potential of Belarus](#),

likely analysing it together with Russia. The Baltic states' reports emphasise the full subordination of Belarus' capabilities to the military plans and decision-making of Russia. SAB notes that the regime in Minsk is still not ready to actively engage in the war with Ukraine. On the other hand, Lithuanian intelligence estimates that Belarus will implement any decision by Russia regarding a future confrontation with Ukraine or NATO.

Reports by the Nordic intelligence services provide much broader estimates of the Russian intentions and capabilities in the Arctic. For example, the Finnish and Swedish reports stress that Russia's motivation here is mainly economic, but there is closer military coordination of military activities in the region with China. The Norwegian service also notes the transfers of some of Russian strategic bombers to Arctic (vulnerable in the south to strikes by Ukraine), increased intensity of their patrols in region, and Russia's progress in research and development of new nuclear systems in facilities and training grounds there.

Implications and Conclusions. The recently published intelligence reports build public awareness of threats and foster non-partisan consensus on the national security of the Nordic and Baltic states. Due to the sensitivity of the topic, none of the documents directly addresses the issue of the negative or positive impact of U.S. policy in terms of a ceasefire between Russia and Ukraine, and its impact on the security situation in Europe. Since these reports are purely analytical and informational, all are without strategic recommendations. However, taken together the reports indicate a similar perception of the growing military threat from Russia to the Baltic-Nordic region. Clarity of the threat assessments may quickly translate into adjustments by the Baltic and Nordic states' military capabilities development plans and even faster increase in their defence spending. These changes may take place sooner than assumed due to the likely reduction of the U.S. share in NATO's deterrence and defence capabilities.

In the context of expected concessions of the new U.S. administration to Russia, there is growing importance of comprehensive analyses of the Russian military threat, as well as activities below open conflict, such as a sabotage campaign by Russia. The convergence of the threat assessments and significance of military threats suggest further need to strengthen political coordination between Poland, Baltic, and Nordic states. This could be achieved by using format of Baltic-Nordic 8 with Poland. Allies should expect in the coming years greater opportunism and risky decisions by Russia towards NATO, even with low levels of training, equipment and professionalism of its army, with a particular target of the Baltic region. Therefore, strong regional cooperation is advisable in terms of preparation for various conflict scenarios, especially in the context of uncertain prospects for the U.S. military presence in NATO and Europe.