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Sabre-Rattling in the Baltic Sea

Russia is using kinetic and informational tactics to intimidate the West as it steps up measures to limit threats posed by the “shadow fleet”.

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Following an uptick in incidents damaging and threatening Northern European countries' undersea infrastructure—nine disruptions within a year—the EU, NATO, and their member states have made important operational and policy adjustments to protect their assets and the Baltic and North Sea environment against damage from commercial vessels. This has included launching [NATO “Baltic Sentry”](#) and the United Kingdom-led Joint Expeditionary Force's ([JEF](#)) [Nordic Warden](#) in January 2025 and introducing the [EU joint communique](#) outlining steps to prevent, detect, respond to and deter threats against undersea infrastructure in February 2025. These measures have sought to address threats from Russia's [shadow fleet](#) of mostly old, uninsured oil tankers and other commercial vessels with obscure ownership structures that violate international law and seek to evade sanctions against Russia.

Russia, whose economy and war machine depend heavily on fossil fuels, relies on the shadow fleet (which carried approximately [61%](#) of Russia's seaborne oil exports between February 2024 and February 2025) to minimize revenue losses amid Western sanctions and the EU and G7+ oil price caps. While [data indicates](#) that the relative share of shadow fleet oil transports (vs. G7+) declined significantly between January and May 2025, their operations continue to pose significant environmental, navigational, and security risks due to their poor seafaring condition and the lack of Western insurance.

In response to western countermeasures, including enhanced monitoring and EU efforts to strengthen the sanctions regime against Russia, the Kremlin has falsely painted European countries' actions as offensive and has taken unprecedented steps that raise the potential for accidents and escalation in the region. Russia has begun escorting shadow fleet vessels with military assets, intensified its GPS-jamming campaign, and amplified belligerent messaging about the Baltic Sea region. This article provides an overview of Russia's kinetic and informational activities between April and June 2025, when the EU introduced [mandatory ship reporting](#) to help counter the threat posed by the shadow fleet. It discusses Russian tactics in the context of the country's [military doctrine](#), which combines military and non-military tools, and its deterrence concept, which [blends conventional and nuclear means](#) to increase uncertainty, aggravate Western risk perceptions, and influence decision-making in favor of its desired outcomes.

Russian Kinetic Actions in the Baltic Sea

On May 13, 2025, a month after Estonia detained the Russia-bound, sanctioned, and flagless [Kiwala](#) tanker, the Kremlin began escorting its shadow fleet vessels with military jets and warships in the Baltic and North Sea region. Specifically, after the Estonian navy attempted to inspect the flagless crude oil tanker Jaguar for UNCLOS violations and proof of insurance—and authorities [escorted the unresponsive vessel out of Estonia's exclusive economic zone \(EEZ\)](#)—a Russian [SU-35 fighter jet](#) briefly violated Estonian airspace while en route to the tanker. On June 21, a disguised Russian Boikiy corvette reportedly escorted two shadow fleet tankers in [the English Channel](#). These unique incidents prompted [Nordic](#) and [Baltic](#) officials to underscore the escalation risks caused by Russia's latest actions.

With a tit-for-tat mentality, Russia, moreover, [stopped an innocent Greek-owned vessel](#), prompting littoral Baltic states to divert maritime traffic to avoid Russian waters. A day after the EU introduced the [17th sanctions package](#) against Russia on May 20, Poland responded to an Antigua-flagged shadow fleet oil tanker, SUN, which was conducting [suspicious maneuvers](#) near a power cable connecting Poland with Sweden. As provocative operations in the Baltic Sea tied to Russia and the shadow fleet have increased, Russian news sources and state media have intensified their [informational offensive](#) against the Baltic States, NATO, and the EU, accusing them of threatening behavior that could provoke escalation and drawing parallels to the start of World War II.

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Concurrently, due to Russia's persistent and recently intensified [GPS jamming and spoofing campaigns](#), Finland and Estonia [warned vessels](#) operating in the Gulf of Finland about resulting navigational challenges that could lead to accidents, and European ministers [issued a letter to the European Commission](#) urging coordinated countermeasures. Russia continues to test NATO's eastern-flank readiness through frequent airspace violations, including during exercises such as the [Finnish-led Narrow Waters](#). It has also conducted several [naval drills](#) near Kaliningrad alongside [NATO's BALTOPS](#), further intensifying regional tensions amid reported incursions into [Finnish](#) and [Polish](#) airspaces.

BALTIC SEA DEVELOPMENTS

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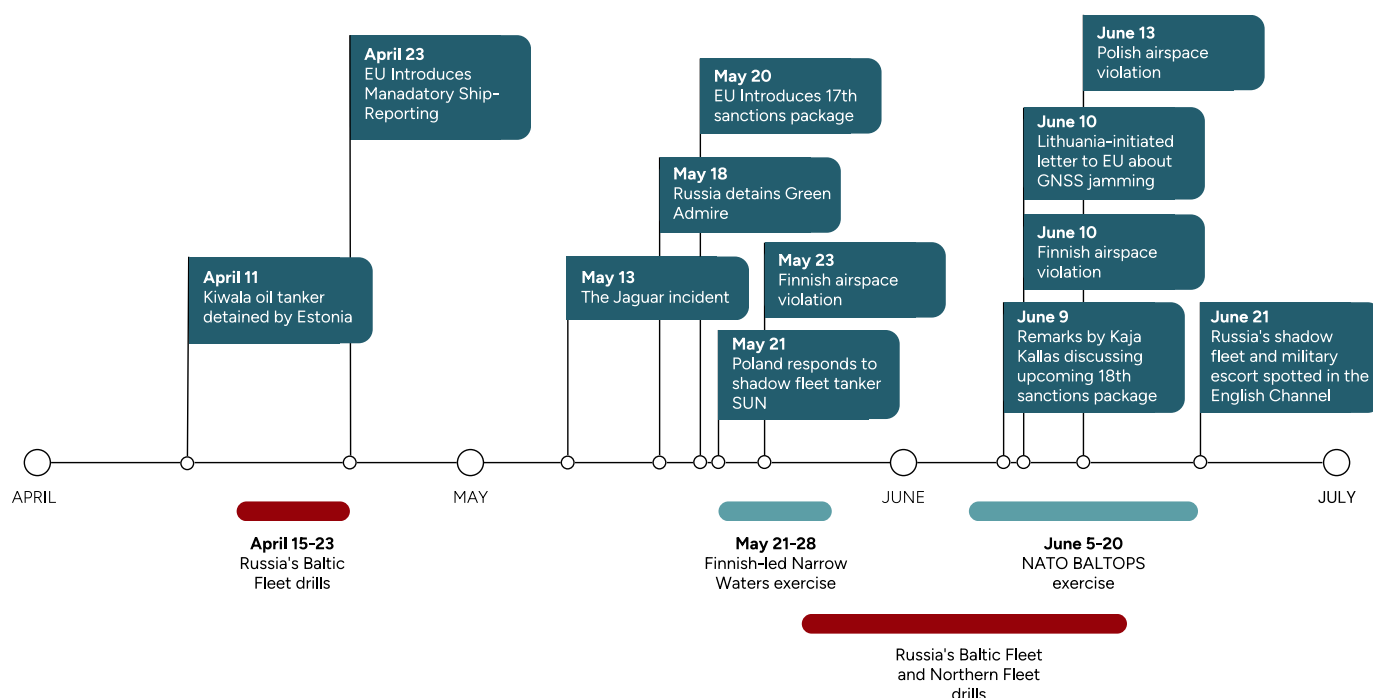


Figure 1: Selected key developments impacting Baltic Sea security. Russia's Baltic and Northern Fleets have conducted several drills in the Baltic Sea, starting May 27. However, the length of these exercises could not be verified.

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Russian Informational Offense

In tandem, Russian officials and state media have increased their informational offensive against European and Baltic countries. Using its [Hamilton 2.0 dashboard tracker](#), GMF identified 1,445 messages related to the Baltic Sea and Baltic countries mentioned by Russian government officials and state-backed media on websites and in their Telegram channels for ten weeks after April 11 ([the day Estonia seized the oil tanker Kiwala](#)). For comparison, during the same period in 2024, GMF tracked only 870 mentions with these keywords. After plotting the number of mentions per day, the platform tracked three larger and two smaller spikes in messaging during this time frame.

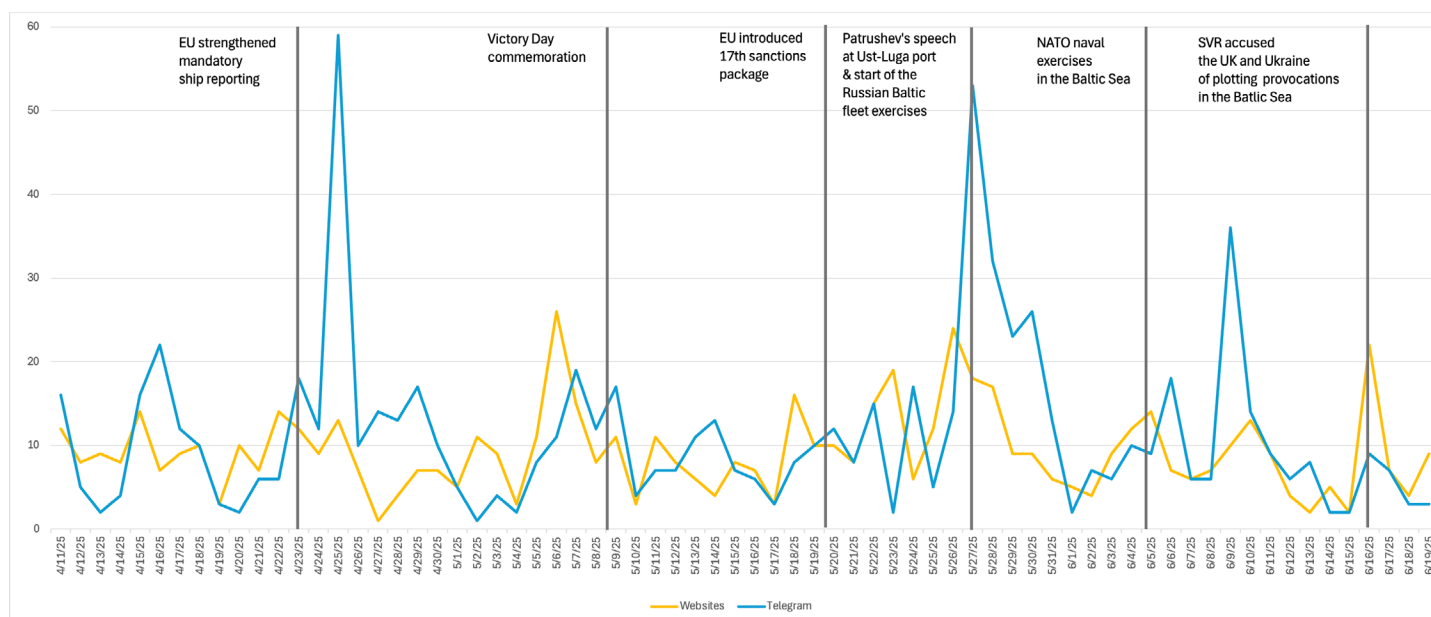


Figure 2. Mentions of the Baltic Sea and Baltic countries by Russian government officials and state-backed media on websites and Telegram channels.

Spike 1: Shifting the Blame

The first and largest spike occurred on April 25, two days after the European Commission strengthened the mandatory ship reporting system. Russian presidential aide Nikolai Patrushev [called](#) these measures “a naval blockade against Russia” that violates international law and “signals an unprecedented escalation in geopolitical tensions”. Russian Ambassador to Denmark Vladimir Barbin [bemoaned](#) the militarization of Bornholm Island, calling it “Denmark’s commitment to a course of increasing confrontation in the region”. Russian Ministry of Foreign Affairs (MFA) spokeswoman Maria Zakharova [cast doubts](#) on the responsiveness of Northern European nations’ leadership and their understanding of the signals that Russia sent about “the inadmissibility and danger of escalating tensions in the Baltic and Arctic regions”. She [blamed](#) Scandinavian countries for what she labeled “madness broadcast from Brussels” and the United Kingdom for “Russophobic fury”.

At the same time, the Strategic Culture Foundation, a journal allegedly [curated](#) by Russia’s Foreign Intelligence Service (SVR), [complained](#) that NATO considered the Baltic Sea its “lake”, ignored Russia’s “military fortress of

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Kaliningrad”, and increased “patrols and threats” against Russian vessels. The journal also [reminded](#) its readers that the Russian Northern Fleet has nuclear submarines and cruisers armed with long-range missiles to “prevent any attempt at logistical strangulation”.

Spike 2: Nazism Allegations

Around the celebration of the 80th anniversary of the end of World War II in early May, the [Russian MFA](#) and [Russian embassies](#) made repeated unfounded claims insinuating Europe’s, and specifically the Baltic States’, ties to Nazism—much as they did with Ukraine in the lead-up to Russia’s 2022 full-scale invasion. The Russian embassy in Ireland underscored this connection, [claiming that](#) “glorification of Nazi accomplices is happening in the Baltics and Ukraine.” Russian Permanent Representative to the UN Vasily Nebenzya [added](#) that “marches of former accomplices of Hitler” take place in the Baltic countries.

Spike 3: Framing NATO Actions as Escalatory

The second largest messaging peak occurred after the [EU imposed the 17th sanctions package](#). While the timing coincided with these measures, the narratives mostly highlighted the start of the planned Russian Baltic Fleet exercises on May 26 and Patrushev’s belligerent speech at Ust-Luga port in the Leningrad region. Patrushev, who [played](#) a key role in Russia’s invasion of Ukraine and the militarization of the Russian economy, [warned](#) against what he called rapidly growing NATO threats and the increasing presence of NATO’s naval forces. Patrushev [added](#) that Western countries continued sanctions pressure on Russia to “block the passage of Russian ships through international waters”. He [recalled](#) the incident with the “[civilian vessel](#)” Jaguar, insinuating that Estonia’s goal was to “detain ships bound for Russian ports”, and [speculated](#) that newly adopted Estonian legislation “may serve as yet another false pretext for provocations within Estonia’s [EEZ] and for expansion of NATO’s military presence in the Baltic region”. As such, Patrushev defended Russia’s countermeasures, labeling the EU’s approach “piracy”, and further [emphasized](#) that “unauthorized interference” requires “additional [Russian] protective measures”. These would, he indicated, include “a comprehensive system” to ensure the safety of water areas near the Leningrad Region’s ports—a veiled reference to the use of military assets to escort shadow fleet vessels in the Gulf of Finland.

The Strategic Culture Foundation [labeled](#) the Baltic Sentry mission “Baltic Pirates” and [speculated](#) that, in addition to regional NATO members, France was also involved in “blocking Russian maritime activity”. The Oriental Review, another journal run by the SVR, [drew parallels](#) between the current situation and World War II, arguing that war broke out because Hitler was getting closer to the Soviet Union, just as NATO is getting closer to Russia. Pro-Kremlin news aggregator PolitInform[.]su [harped](#) on this war theme, openly stating that there would be a conflict between Russia and European NATO countries.

Spike 4: Alleged European Conspiracies and Provocations

In June, Russian state media discussed the Baltic Sea and the region in light of NATO’s annual military exercises, which overlapped with the Russian Navy’s Baltic Fleet drills. Propaganda outlets [amplified](#) the Kremlin’s accusations of NATO expansionism, military buildup in Europe, and unprecedented NATO activity near Russia’s western borders. Russia’s Ambassador to the Netherlands, Vladimir Tarabrin, [declared](#) that NATO further militarized the region using a “fictitious threat to underwater infrastructure”, created artificial barriers to navigation, and increased the risk of incidents. Patrushev pointed to recent maritime incidents that he [called](#) “provocations against Russia”. Meanwhile, Russia’s Ministry of Defense [highlighted](#) anti-terrorism drills for “liberating vessels captured

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by militants”, alluding to European attempts to stop suspicious shadow fleet tankers.

In mid-June, Russian propaganda outlets also spread the SVR’s allegations that “Ukraine and the United Kingdom” were preparing “bloody provocations” in the Baltic Sea. Purportedly, one of these provocations [could involve](#) “an attack on a US Navy ship with a Russian torpedo” to be presented to the public as “evidence of Russia’s ‘malicious actions’”. Another scenario [envisioned](#) “accidental fishing out of Russian-made anchor mines in the Baltic Sea”, which the source claimed would be planted by Northern European countries to mimic Russian sabotage on the international sea lane.

Deterring the West Through Kinetic and Information Tactics

Russia’s blending of military and non-military tools supports Russian strategic objectives in several ways.

Kinetic activities in the Baltic and North Sea demonstrate Russia’s resolve to respond militarily to European countermeasures against the Kremlin and its enablers. While these actions raise the potential for conventional confrontation and thereby enhance deterrence, they also test European responses and readiness.

Russia’s information offensive seeks to justify its military actions as mere self-defense against alleged European “naval blockade[s]”, “piracy”, “Nazism”, and future false-flag operations. The active promotion of these narratives by Russia’s MFA suggests they are not only aimed at the domestic population, but also at foreign audiences. Russia’s portrayal of heightened Western vigilance in the Baltic Sea as aggression suggests that the country is facing a looming (conventional) existential threat—a scenario that could provoke a nuclear response under Russian doctrine. References to alleged aggression by European nuclear states—the United Kingdom and France—exacerbate this dynamic. Mentions of Kaliningrad and the Northern Fleet evoke Russia’s nuclear weapons arsenal and further raise the specter of escalation—in line with Russia’s well-established tactic of nuclear saber-rattling to intimidate NATO countries and undermine their political cohesion. Russia likely seeks to convince the United States and other Western powers that further defensive regional posture reinforcements are escalatory—putting the onus of restraint on the NATO allies.

Europe’s Continued Resolve

Given the important role the shadow fleet continues to play in supporting Russia’s economy and war machine, Moscow will likely continue provoking EU member states and NATO allies in the Baltic and North Sea to deter them from advancing further punitive economic measures, maritime monitoring, and military posture upgrades.

So far, Russian tactics have not successfully deterred the Western allies from implementing important measures, which have helped curb the shadow fleet’s activity and its associated risks. The [EU’s 18th sanctions package](#) and [the United Kingdom’s latest measures](#) are together a clear demonstration of European resolve, and a willingness to further crack down on Russia and its enablers, including by blacklisting the [Jaguar’s captain](#) and companies associated with the vessel’s operations, and lowering the price cap on Russian oil by 20%. Similarly, the US administration has signaled that it is [considering sanctions against](#) the Shadow Fleet and Russia’s enablers.

Swift and cohesive action by the EU and NATO allies against the shadow fleet and other suspicious vessels, paired with clear and coordinated strategic communication highlighting European allies’ defensive actions and their foundations in international law, will remain critical to maintaining European security and resilience and a credible NATO defense and deterrence posture.