



National and regional approaches in managing hybrid threat in current situation on Baltic sea

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REPUBLIC OF ESTONIA
MINISTRY OF CLIMATE

About myself

Public sector



REPUBLIC OF ESTONIA
MINISTRY OF CLIMATE



REPUBLIC OF ESTONIA
MINISTRY OF ECONOMIC AFFAIRS
AND COMMUNICATIONS

Other

Tallinna
Lennujaam



Maritime experience

VIKING LINE

Brittany Ferries

TALLINK

FRS

SEATRUCK

Safmarine

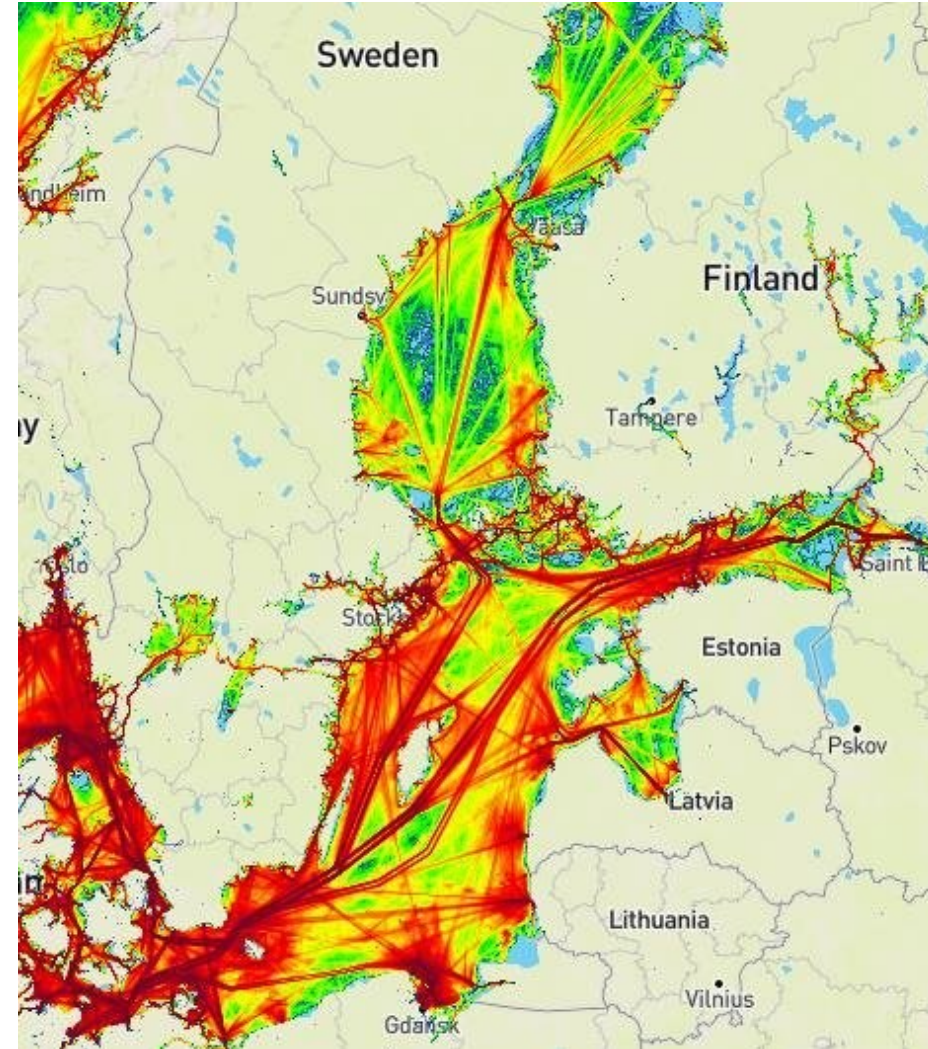
Education

TAL
TECH



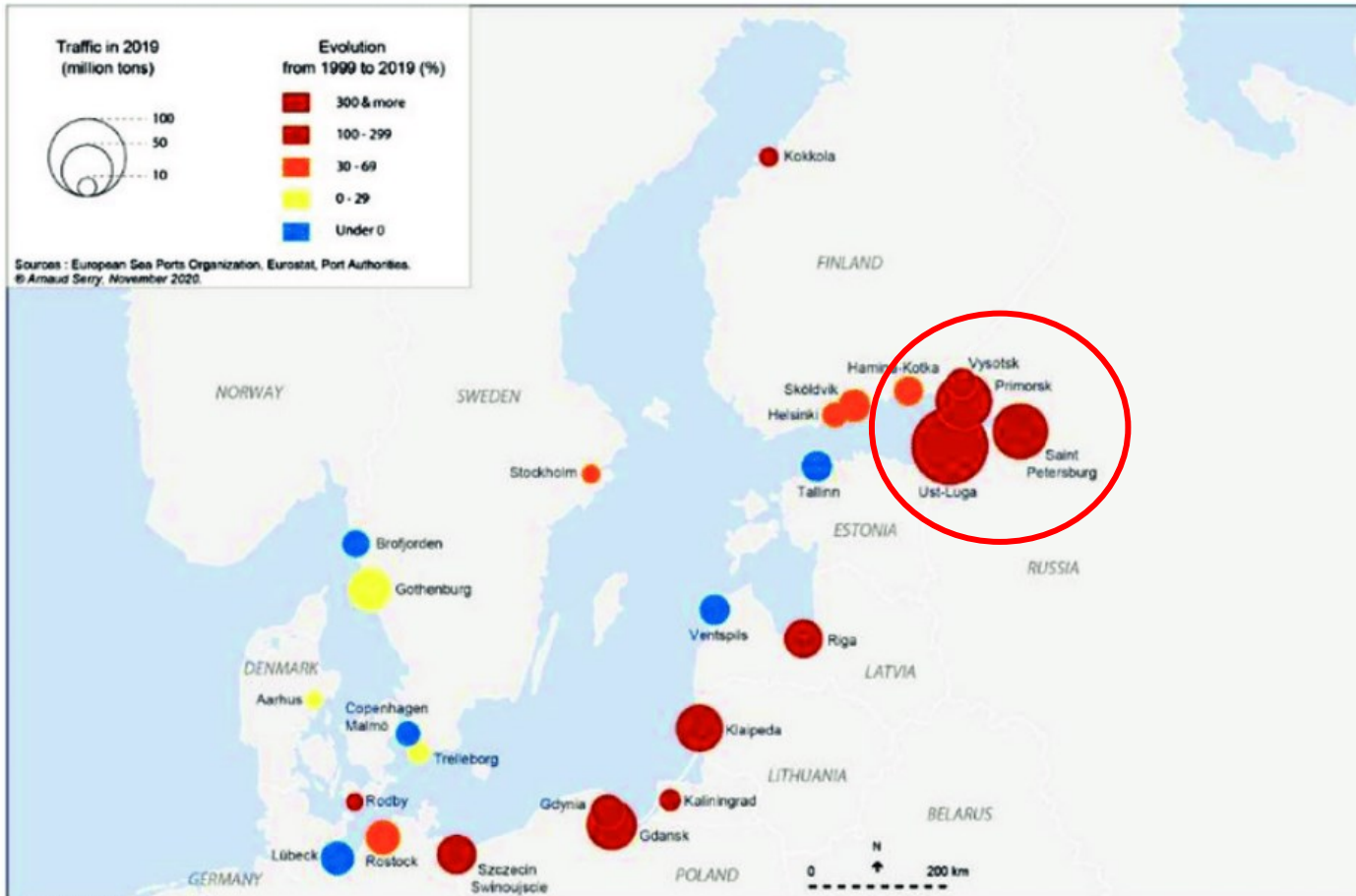
Introduction

- At any given moment, there are approximately 2,000 cargo ships navigating the Baltic Sea
- In 2024, approximately ca 24 million passengers were carried by major operators on the Baltic Sea.
- In October 2024, approximately 14.3 million tons of Russian crude oil and petroleum products were exported through Baltic Sea ports.
- Estonia is located with Finland at the beginning of Russian oil trade.





Russian trade on the Baltic Sea



Serry, Arnaud. (2021). Port Reorganisation Revealing East-West Differentiation in the Baltic Sea Region. Regional Formation and Development Studies. 35. 101-110. 10.15181/rfds.v35i3.2276.



Terminology on substandard shipping, shadow fleet, dark fleet, grey fleet, parallel fleet vs sanctioned vessels etc



E

1. carrying out unsafe operations which do not adhere to international regulations and well-established and strict industry standards and best practices;
2. intentionally avoiding flag State and port State control inspections;
3. not maintaining adequate liability insurance or other financial security;
4. intentionally avoiding commercial screenings or inspections;
5. not operating under a transparent corporate governance policy that assures the welfare and safety of those on board and the protection of the marine environment; or
6. intentionally taking measures to avoid ship detection such as switching off their AIS or LRIT transmissions or concealing the ship's actual identity when there is no legitimate safety or security concern sufficient to justify such action;



As a Lloyds List Intelligence April 2023 report explains, prior to the imposition of international sanctions in response to Russia's full-scale invasion of Ukraine the term 'shadow fleet' was primarily used to **describe tankers 'going dark' by turning off their tracking transponders to conceal their true location and the destination of oil subject to US sanctions**. In other words, the term 'shadow fleet' was used to refer to a 'dark fleet', in its narrowest sense. However, the same report notes that vessels no longer fit a catch-all, single category of 'dark fleet' owing to the emergence of many shades of grey in terms of legality and compliance with the regulations.

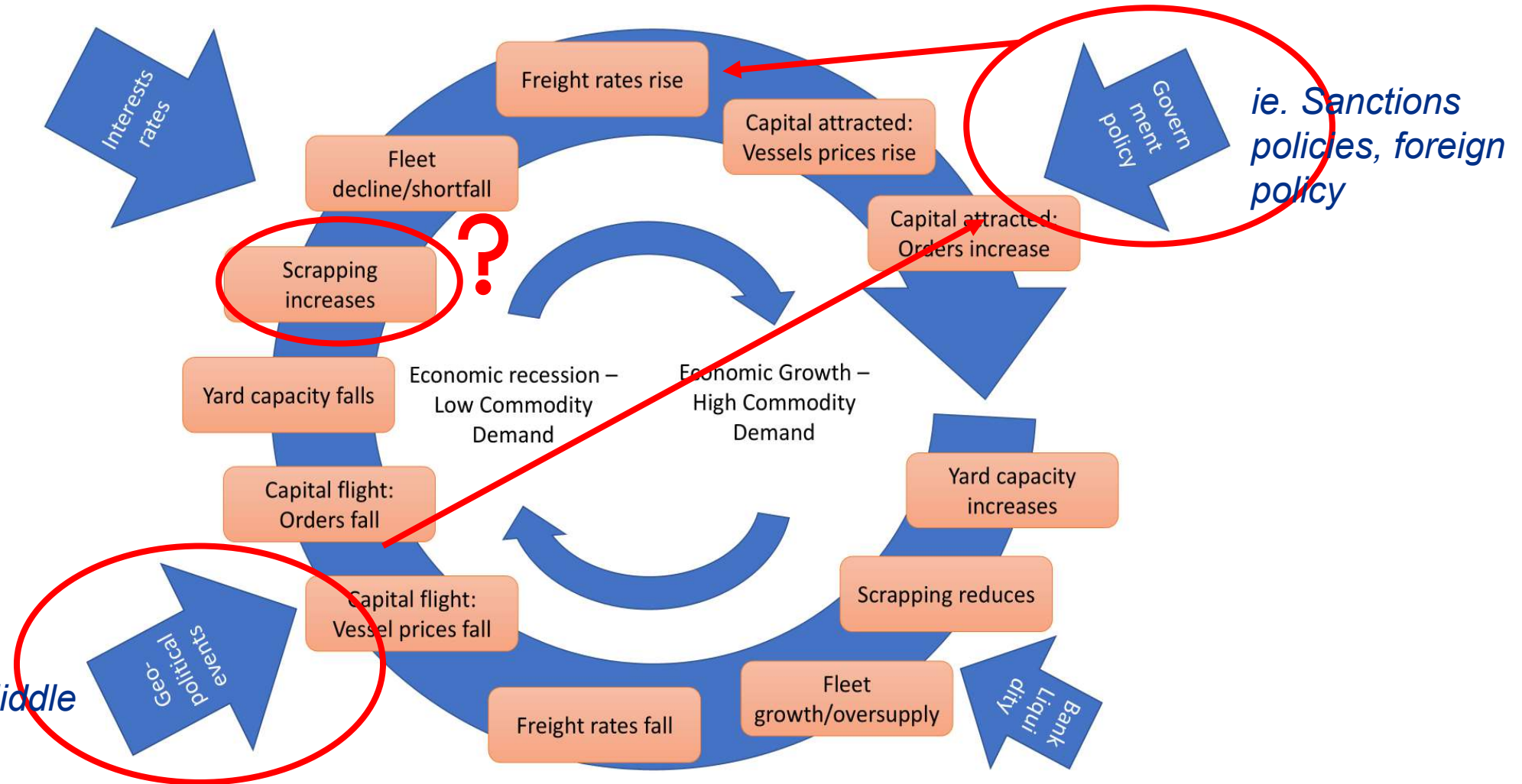


To unite these criteria, the KSE Institute (Kyiv School of Economics) proposes a wider definition of 'shadow fleet', to properly evaluate their size and 'the new and significant risks they create'. Under this definition, a 'shadow fleet' comprises **all vessels that simultaneously meet two conditions:** (i) they lack Western insurance and rely instead on providers outside the International Group of Protection and Indemnity Clubs; and (ii) they belong to companies from non-EU/G7 countries.

- **Substandard ship** is a ship whose hull, machinery, equipment, or operational safety is substantially below the standards required by the relevant convention or whose crew is not in conformance with the safe manning document. (IMO PSC procedurest).



Understanding shipping





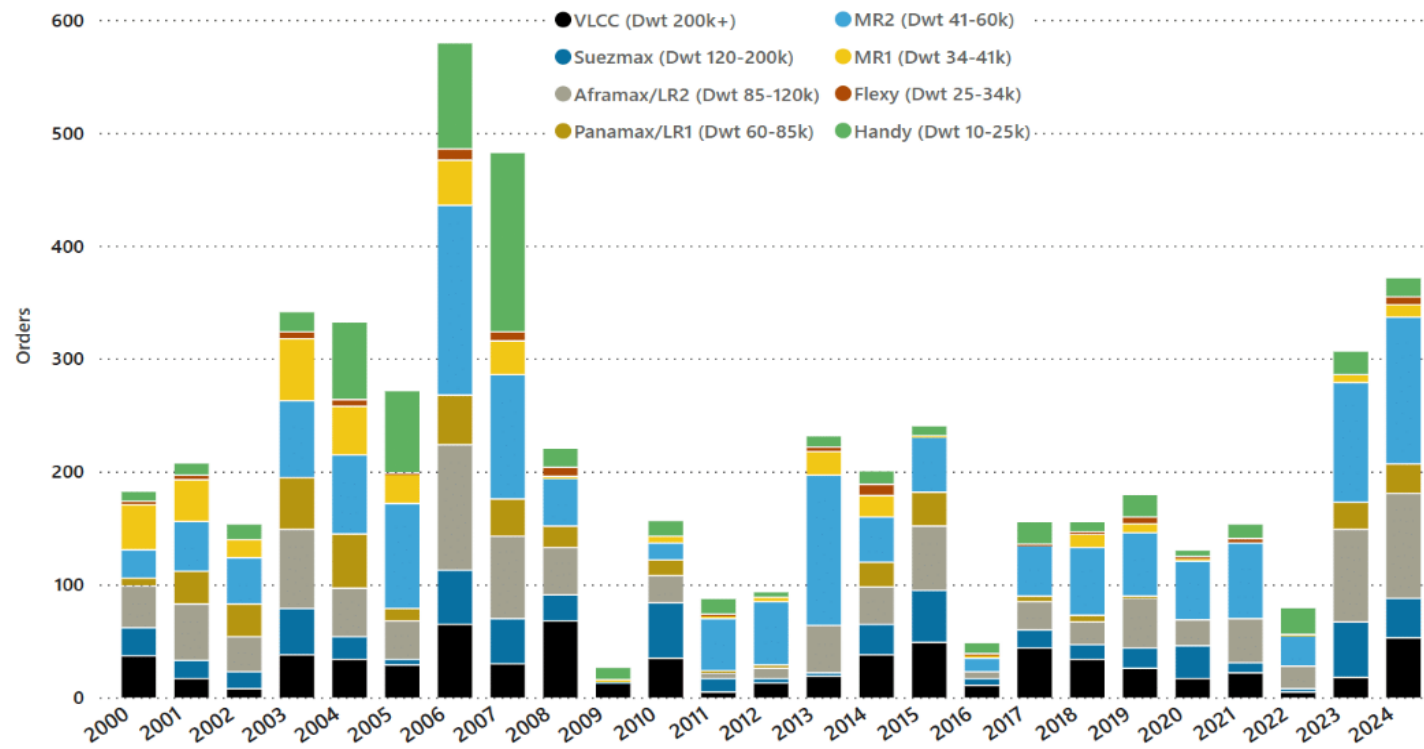
Baltic dirty tanker index



Baltic Dirty Tanker 881.00 -2.00 (-0.23%)



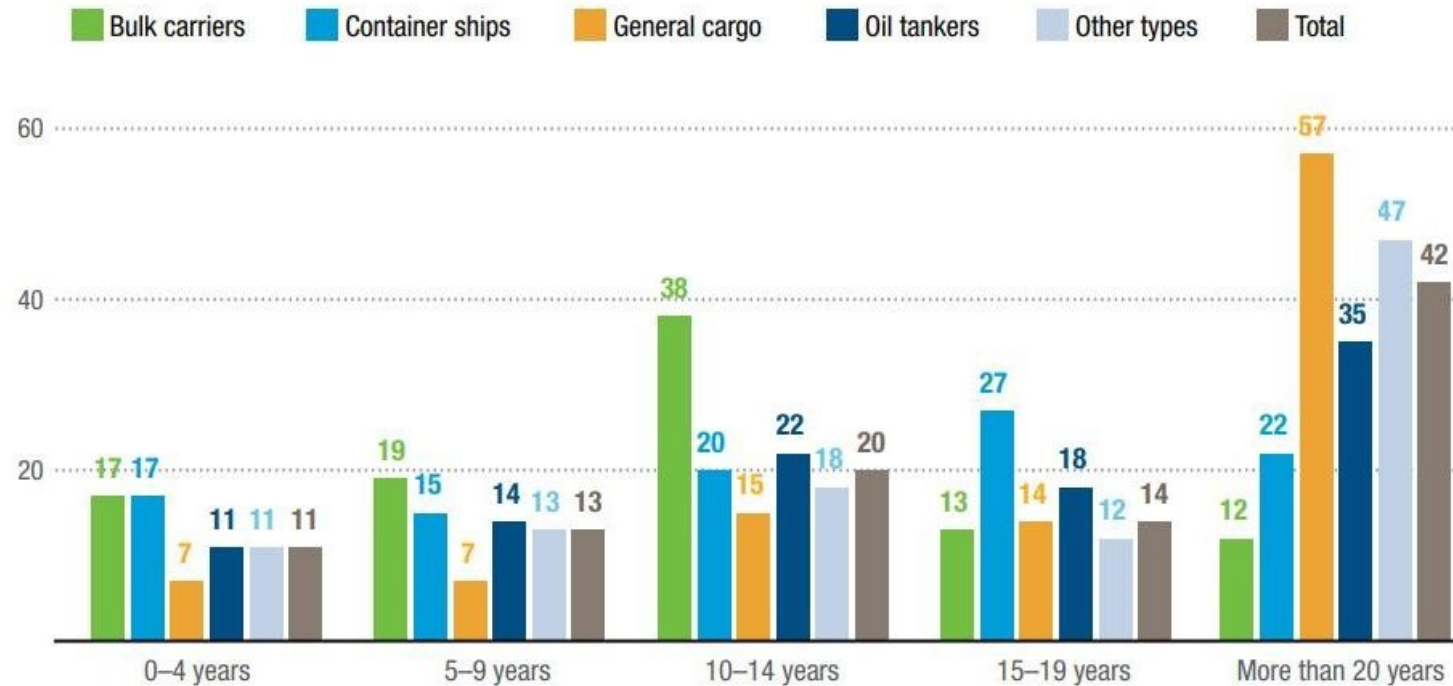
YEAR-TO-DATE TANKER ORDERING ACTIVITY PER SEGMENT





Average age of world fleet

Average age of world fleet, percentage number of vessels, 2024



Source: UNCTAD calculations, based on data provided by Clarksons Research Services.

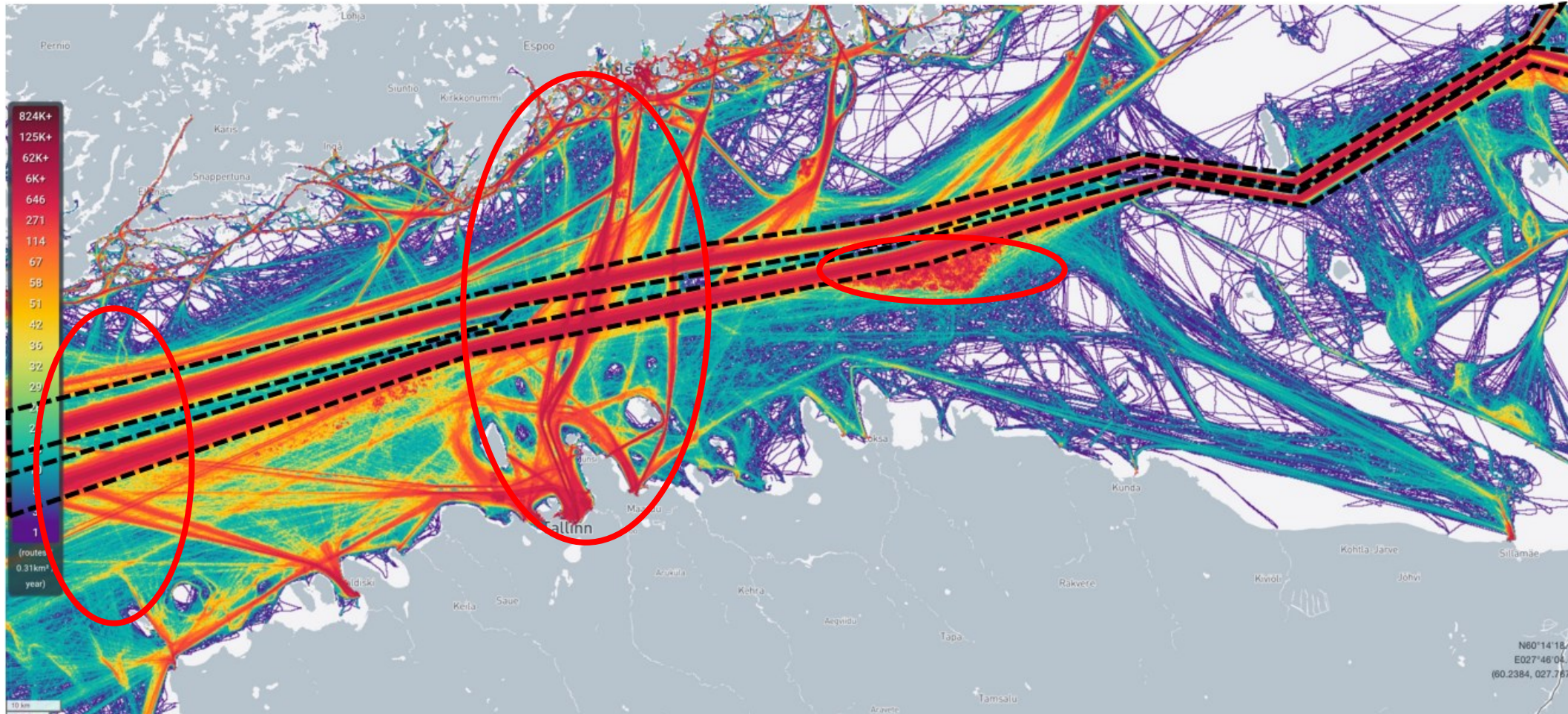
Note: Propelled seagoing vessels of 100 gross tons and above, as of 1 January 2024.

UN Trade and Development calls for

- Strengthened international cooperation to stabilize trade routes, enhance resilience and minimize supply chain disruptions from geopolitical and climate-related risks.
- Improved monitoring systems for early detection of chokepoint disruptions and faster rerouting, as well as investment in early warning systems for ports.
- Support for regional trade to reduce reliance on vulnerable routes and boost intraregional supply chains.
- Enhanced global coordination to prevent protectionism and ensure open trade routes.
- Active support of all UN Member States and stakeholders for IMO efforts to combat fraudulent ship registration through better verification, information sharing and strengthening of the legal framework.

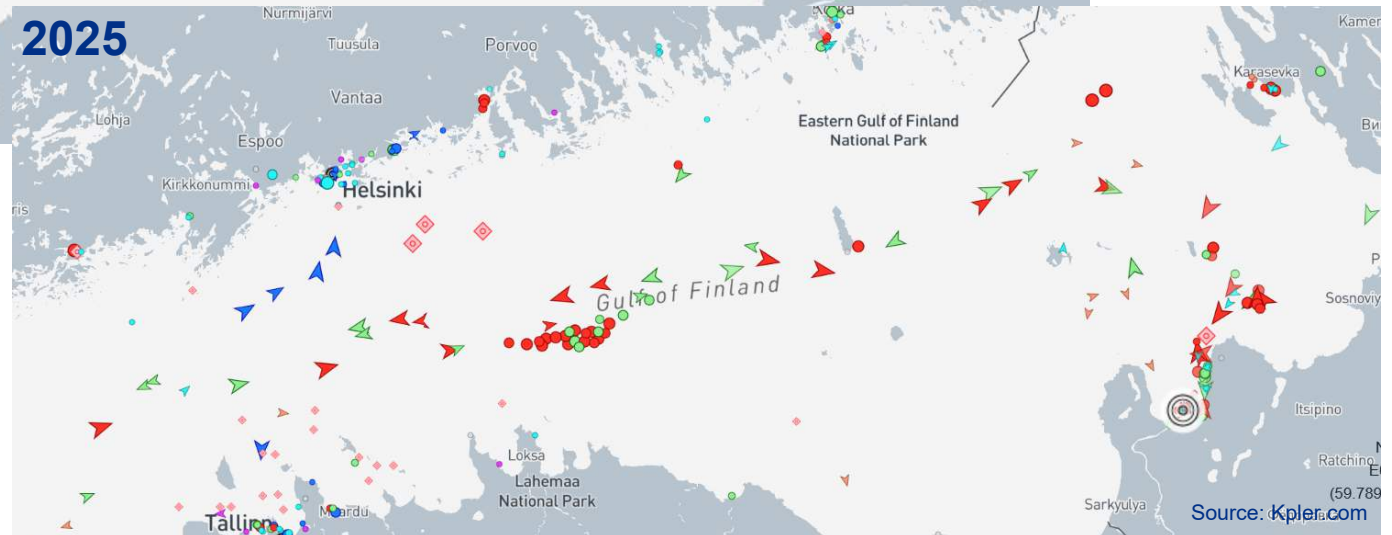
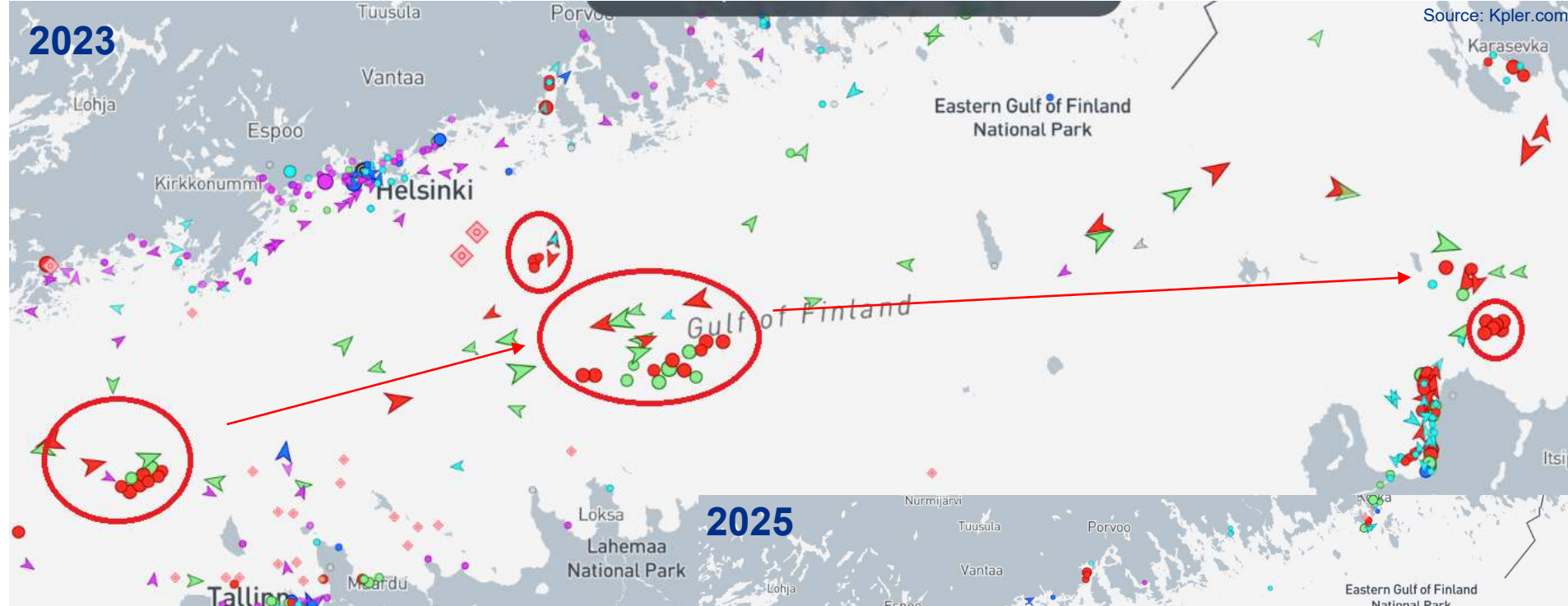


Situation on the Gulf of Finland



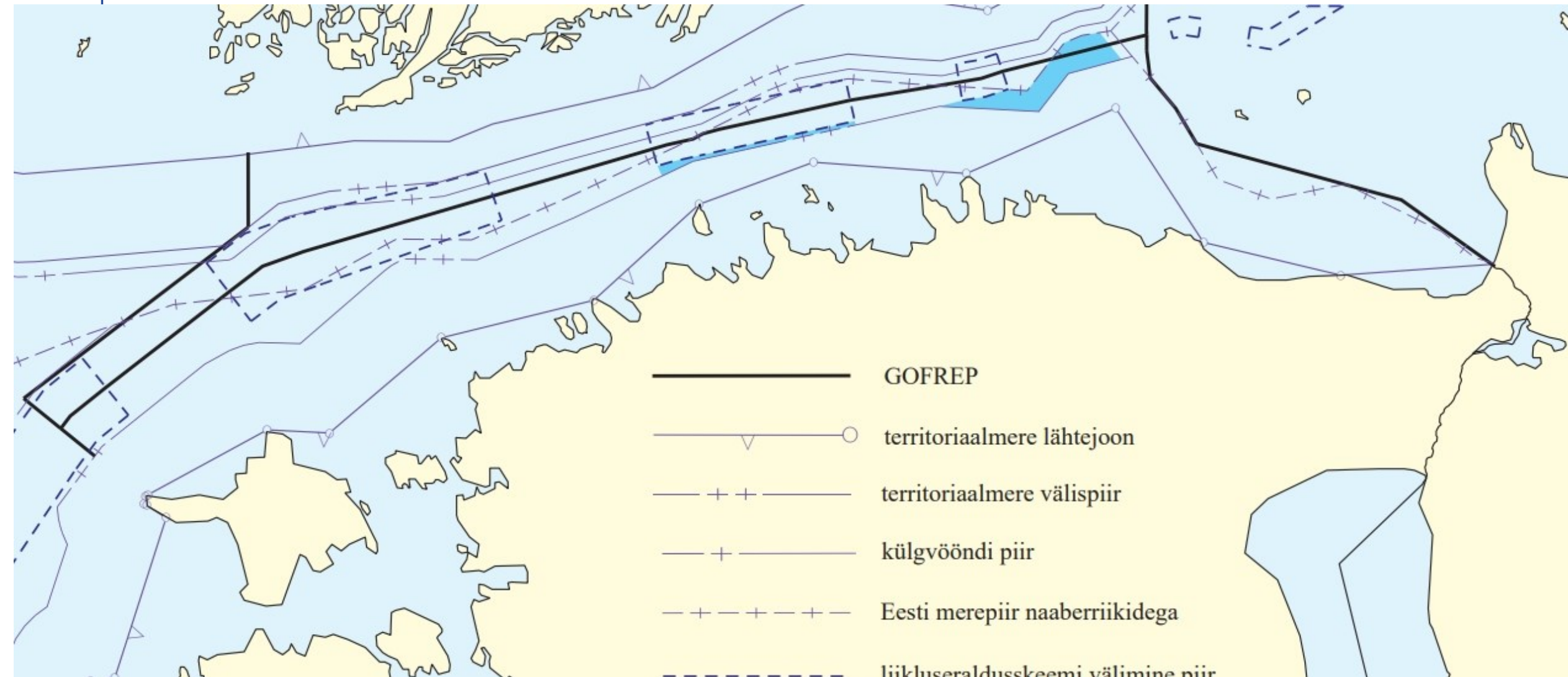


Vessel gatherings in the Gulf of Finland





Maritime boundaries in the Gulf of Finland





What is happening on the Baltic Sea?



United Nations

Meetings Coverage and

9741ST MEETING (AM)

At Security Council Meeting on the Nord Stream Pipeline, Members Condemn Attacks on Cables and Stress Need for Accountability

Several Members Call Out Russian Federation's Resources while Moscow Destroys Ukrainian Ship

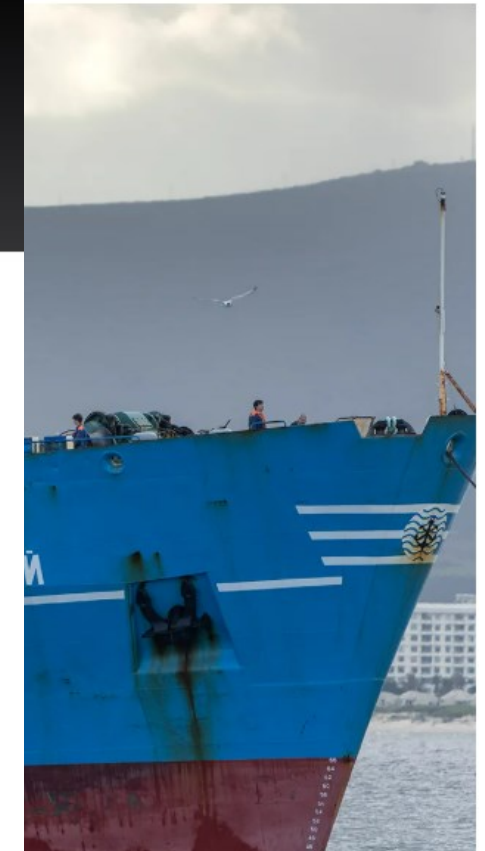
Two years after the September 2022 explosions that damaged natural gas pipelines in the Baltic Sea, the Security Council, in the absence of a brief, assessed the Russian Federation, who, in the absence of a brief, assessed the lack of conclusive findings and the 15

WORLD NEWS

NATO announces a new mission to protect undersea cables in the Baltic Sea region



to dock in Estonia





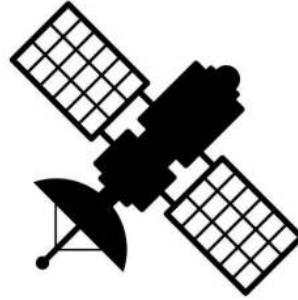
What are we encountering?



Divers,
submersible
activities



Anchor dragging,
self made
anchorage areas



GNSS disruptions,
GPS spoofing



Naval shadowing,
escorting, armed
guards



Spying and
intelligence

Sabotage, negligence or accident





Fire and rescue services respond after a collision between the oil tanker MV Stena Immaculate and the cargo vessel MV Solong on Monday. Getty Images. NBC News.



What is done in tackling these challenges?

- Emphasizing international collaboration, particularly on regional and EU levels, leveraging initiatives like CISE and Safeseanet.
- Utilizing various EU and NATO formats.
- Aligning maritime activities within the NB8++ format.
- Conducting outreaches to ship register countries.
- Gathering evidence for vessel listing packages and information on insurance and technical conditions.
- Increasing the presence and surveillance within the maritime domain.



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Policy paper

Joint statement on further action to counter Russia's 'shadow fleet'



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Joint Statement 4th Shadow Fleet Expert Group Meeting 19–20



NORTH ATLANTIC TREATY ORGANIZATION

NATO launches 'Baltic Sentry' to increase critical infrastructure security



Challenges for Estonia

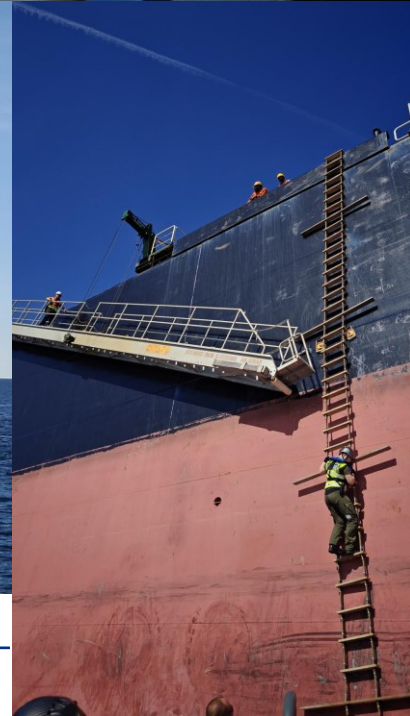
- Large amount of vessels standing idle in the EEZ – some days until several months
- Oil trade and passenger traffic is crossing in the Gulf of Finland increasing risks for high casualty accidents.
- Environmental risk due to collision/grounding but also tank wash residues
- Estonian location at the beginning of the Russian oil seatriade creates addition risks – additional gathering of vessels due transitsion persiods of imposing different sanctions.
- Lack of co-ordination between imposing sanctions by different countries and economies may have stepbacks in our waters
- Uneffectivenss of port state control mechanism incuding data gathering in current situation
- GNSS disruptions have increased from 01.07.2024 (lasting from couple of minutes to several hours and are daily)





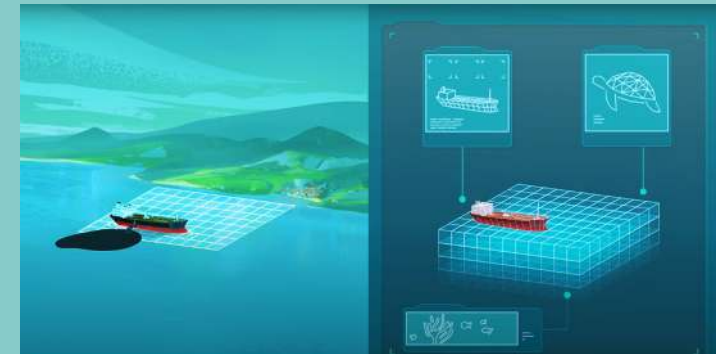
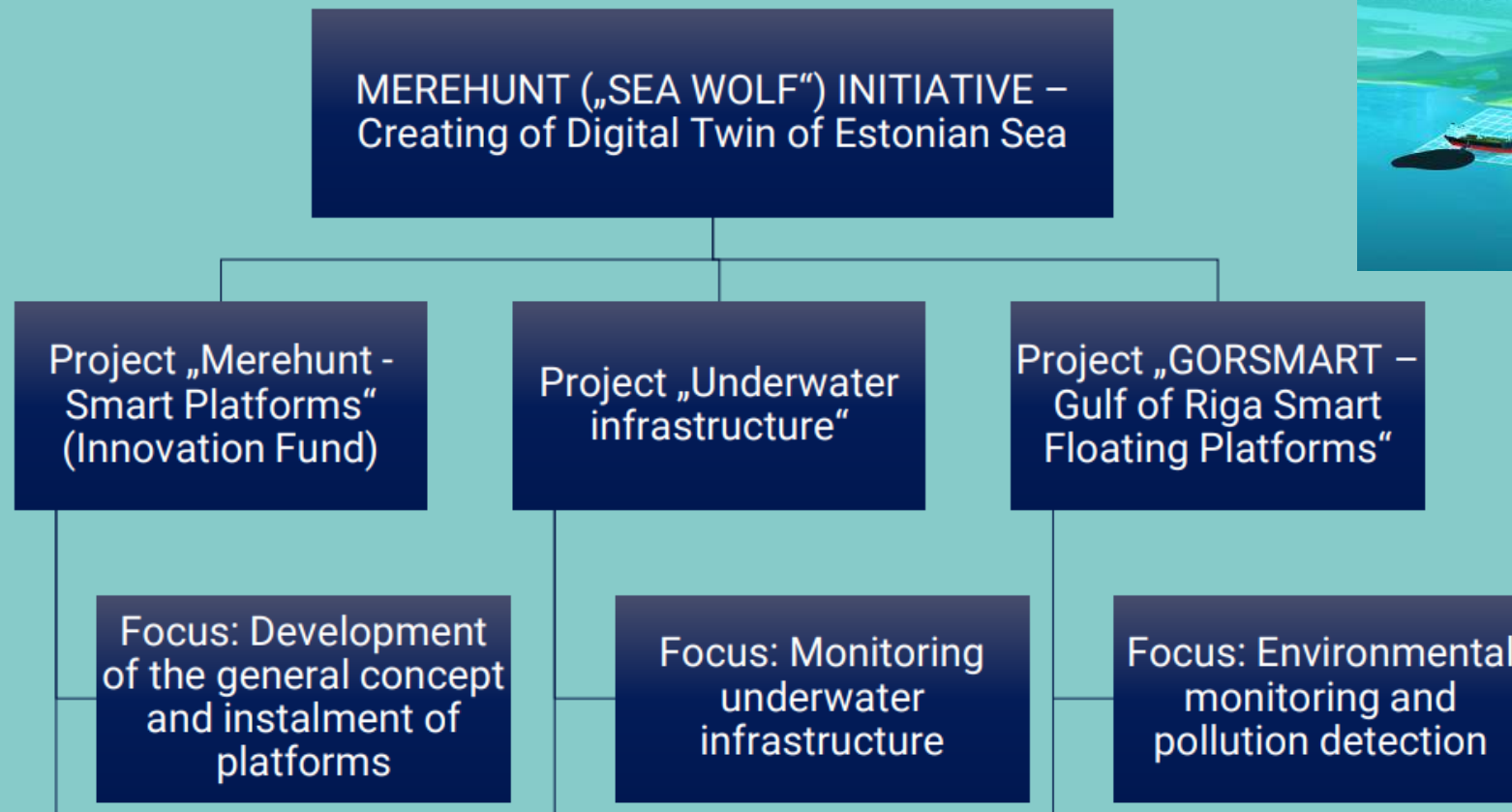
Inspections and boarding in the EEZ last year

- From 19 June 2024 Estonia has asked 413 times insurance documents from vessels anchoring in the EEZ.
- 337 responses were received and 76 did not respond.
- Majority of the vessels have valid insurance documents.
- No major technical issues have been discovered.
- 7 boardings, one refusal and 1 false insurance were discovered.
- Majority of vessels are registered in Gabon, Panama, Cook Island, Cameroon, Azerbaijan, Barbados, Guinea Bissau





Estonia has started to pilot a network of smart platforms that would provide a real-time overview of what is happening in Estonia's maritime area.



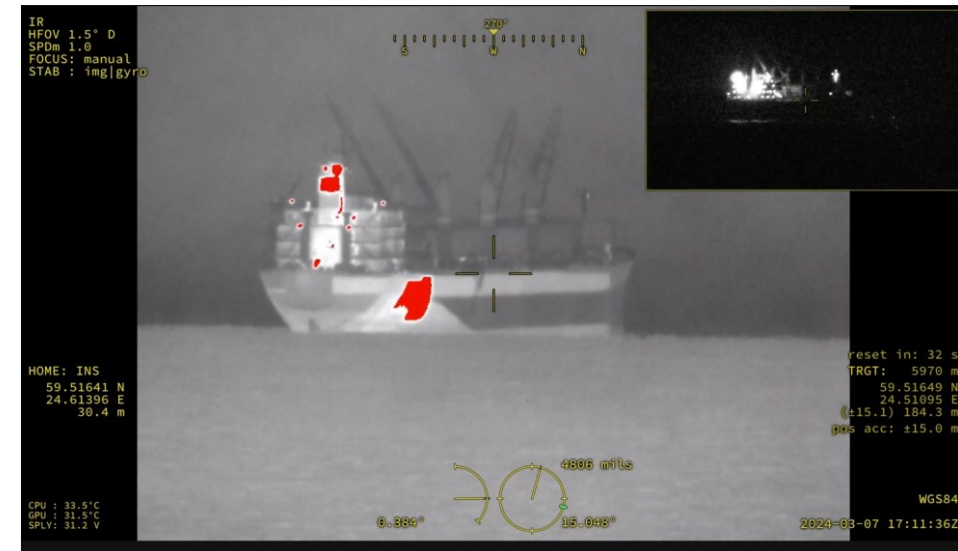


Conclusion

- Hybrid threat is new norm on the Baltic Sea.
- These threats combine military and non-military tactics onshore, at sea, underwater etc.
- To tackle these threats we need expand the use of different technology, methodology and resources.
- International collaboration is key.
- It is a chess game where you need to think two steps ahead and constantly revise your strategy.

We came from „cold war“ age ...

*but are we entering „shadow war“
age on the Baltic Sea?*





Questions?

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