



The Maritime Zeitenwende: Germany in the Northern Waters

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Acknowledgements



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Executive summary

- The Zeitenwende announced following Russia's invasion of Ukraine in February 2022 marked a significant shift in Germany's approach to security and defence. Germany is now seeking to take on a broader maritime security role in the Baltic Sea and North Atlantic – the Northern waters. German priorities in recent years reflects a commitment to becoming a permanent and reliable pillar of European defence also in the maritime domain.
- Major investments – both prior to and after Russia's invasion of Ukraine – include P-8 maritime patrol aircraft, advanced frigates (F127 and F126 types), TKMS212CD submarines, and a range of unmanned systems under development. These initiatives aim to bolster NATO's deterrence in Northern Europe while addressing challenges of fleet readiness and resource allocation.
- Germany and Norway have strengthened their bilateral defence relationship, especially related to the acquisition of joint submarines and advanced missile systems. Operational efforts include protecting critical underwater infrastructure and enhancing maritime situational awareness. This partnership underscores shared strategic priorities in the Northern waters.
- Germany has in recent years maintained a presence in NATO operations across the Baltic Sea, North Atlantic, and beyond. However, global deployments such as those in the Indo-Pacific, risk an overstretch given limited resources. Balancing global ambitions with regional responsibilities remains critical for Germany to sustain operational effectiveness.
- Political and economic factors, including fiscal constraints and upcoming snap elections, may impact the further development of German security and defence in the Zeitenwende. Much is uncertain regarding the 2025 election, but it is likely that a new government will keep investing in security and defence. Still, a discrepancy between ambitions on the one hand and political and economic challenges on the other exist.
- Despite limited resources, Germany has made advancements in maritime strategy by aligning operational practices with strategic objectives. Its commitment to Northern European maritime security offers pathways for deepened relations with Norway.

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Introduction

The security landscape in Northern Europe has been fundamentally altered by Russia's full-scale invasion of Ukraine in February 2022 and persistent aggressive hybrid activity aimed at Northern European countries. One of the effects of these developments has been a deepening of German-Norwegian security and defence cooperation. The two countries have long been close partners, and recent developments have only been catalysts to further increase their cooperation. Norway's 2024 strategy document for cooperation with Germany states that the country is its most important European partner (Norwegian Ministry of Foreign Affairs, 2024). In 2023, the two countries signed a declaration of intent to enhance the bilateral co-operation in security and defence (Norwegian Government, 2023).

A crucial context for the increased cooperation witnessed in the past years is the German response to Russia's full-scale invasion of Ukraine. As many European NATO members, Germany had long been lagging behind NATO's defence spending target of two percent of GDP and taken a more cautious approach to the increasing threat from Russia. The country had rather hoped that close trading ties would deter potential aggression referring to the principle of "Wandel durch Handel" (change through trade) of the traditional social democratic policies towards the Eastern bloc ("Ostpolitik") since the early 1970s. This all changed in February 2022 when Russia invaded Ukraine. It was therefore considered monumental when Federal Chancellor Olaf Scholz addressed the Federal Parliament (Bundestag) three days after the invasion. He promised a large-scale German upscaling of its approach to security and defence, including a significant increase in defence spending aiming at exceeding the NATO two percent goal – which was eventually achieved in the spring of 2024 – and through granting heavy military support to Ukraine. This has become known as the German *Zeitenwende*, as Scholz termed the times we are living in a watershed in the history of the European continent. These developments in the German approach to security and defence created a window of opportunity for partner countries that would like to increase cooperation with Germany. And Norway is one of these countries.

German-Norwegian defence cooperation is especially relevant in the maritime domain, and the joint project to build and operate identical submarines currently being manufactured in Kiel is the staple in this area. In this context, this report answers two questions. First, how has the German approach to deterrence and defence in the Baltic Sea and North Atlantic developed since the announcement of the *Zeitenwende* in 2022? Second, how can Norway and Germany enhance maritime cooperation bilaterally, and in a transatlantic multilateral context?

The deteriorated security landscape has substantial implications for maritime security in the Northern European region, an area where seeks to play Germany a crucial role for NATO deterrence and defence (D&D). With the announcement of a *Zeitenwende* and the initial establishment of a €100 billion Special Investment Fund in February 2022, Germany expressed strong political will to assume a more prominent role in NATO D&D (Jakobsen et al. 2023). How Germany conducts its security and defence policy in the maritime domain and develops its force structure and instruments of power is therefore of vital importance to the region, NATO, and Norway.

In this report we study recent developments in German maritime defence policy and practice with a particular view on German-Norwegian relations. These relations are crucial, as the current security landscape challenges old geographical domains, particularly a stark division between operations in the Baltic Sea and North Sea. These areas are now being re-defined in and through military activity and technological advancements to address the security situation – including the increasing importance of protecting critical infrastructure – which will further contribute to policy development in the short and longer term. The report is structured as follows. First, we present and analyse the emerging German maritime strategy, including the state of German rearmament in this domain. Second, we delve into German-Norwegian relations especially to unravel both political and operational developments taking place between the two countries. This allows us to also consider the longer-term developments that may be expected in coming years, as what is done and decided today will determine the cooperation structure for decades ahead. Third, we evaluate the broader political uncertainties in Germany, as there is an inherent volatility in the German willingness and ability to pursue its ambitions. This pertains to domestic factors such as political stability, considering the failure of the government in November 2024 and the upcoming snap elections in February 2025, the pressure on fiscal discipline in German politics, and the viability of German support to Ukraine’s fight against Russia’s unlawful invasion of the country.

German Maritime Strategy in the Zeitenwende

In 2023, several authoritative strategy documents were published in Germany as the country sought to adapt its armed forces and strategic outlook to accommodate the deteriorated security environment in Europe. They illuminated the German strategic outlook as well as plans for force development. The Defence Policy Guidelines published in November 2023 provides direction for the military-strategic planning in support of the objectives set out in the National Security Strategy of June 2023. The German Ministry of Defence presents a “permanent and reliable” capability for the defence of Europe as a key strategic priority, aimed at “strengthening the Bundeswehr’s defence capability in such a way that it can serve as a permanent and reliable pillar of conventional defence in Europe” (German Federal Government, 2023).

Maritime combat power and the ability to establish and maintain Maritime Domain Awareness (MDA) are vital components of conventional defence. In recognition of this, Germany have expressed intent to take on more responsibility for D&D in the Baltic Sea and the North Atlantic (Bundeswehr, 2021; Bundeswehr, n.d-a). Analysis of how this intent has materialized after the announcement of Zeitenwende could be considered important for assessing the trajectory of “the Maritime Zeitenwende” and prospects for a stronger German role in NATO, including cooperation with Norway that – naturally – has a substantial naval presence in the Northern waters.¹

In addition, in the latest version of its cross-sectoral Arctic policy guidelines, adopted in September 2024, the German government recognizes the growing strategic military significance of the Arctic. It supports an increased focus of NATO and the EU on the security policy implications of the Arctic and is willing to expand the mutual exchange of experiences with partners and allies, to allocate the relevant capabilities for reconnaissance and to plan regular training activities in the region including in the maritime domain (German Federal Government, 2024).

In the 2023 Defence Policy Guidelines three “strategic priorities in defence policy” were set out: (1) Strengthening our Defence Capabilities and our Commitment to the Alliance, (2) Supporting Stability in Europe’s Neighbourhood and (3) Contributing to Maintaining the Rules-Based International Order (German Federal Ministry of Defence, 2023). These priorities can be perceived as broad, and they will require comprehensive capability development to be successfully accommodated. In the years following Federal Chancellor Scholz’ announcement of Zeitenwende, the Bundeswehr has participated in a very broad spectrum of maritime operations in line with all three priorities. Germany has shown commitment to NATO and collective defence in the maritime domain through sustained contributions to the Alliance’s Standing Maritime Groups.

¹ While there is no authoritative definition of ‘Northern waters’ around, and while it has previously been used to describe areas close to the Arctic, we use the concept to describe the entire emerging theater from the Baltic Sea and all the way to the North Atlantic.

Year	Months
Standing NATO Maritime Group 1 (SNMG1)	
2021	Jan, Feb, Mar
2022	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sept, Oct
2023	Jan, Feb, Apr, May, Jun, Sept, Oct, Nov, Dec*
2024	Jan, Feb, Mar, Jul, Aug, Sept**
Standing NATO Maritime Group 2 (SNMG2)	
2021	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sept, Oct, Nov, Dec
2022	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sept, Oct, Nov, Dec
2023	Jan, Feb, Apr, May, Jun, Sept, Oct, Nov, Dec*
2024	Jan, Feb, Mar, Jul, Aug, Sept, Oct, Nov**
Standing NATO Mine Countermeasures Group 1 (SNMCG1)	
2021	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sept, Oct, Nov, Dec
2022	Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sept, Oct, Nov, Dec
2023	Jan, Feb, Apr, May, Jun, Sept, Oct, Nov, Dec*
2024	Jan, Feb, Mar, Jul, Aug, Sept, Oct, Nov**
Standing NATO Mine Countermeasures Group 2 (SNMCG2)	
2021	-
2022	Feb, Mar, Apr, May, Jun, Aug, Sept, Oct
2023	_*
2024	_***

*Data for March, July and August 2023 n/a.

**Data for April, May, June and December 2024 n/a.

Table 1. German contributions to NATO Standing Maritime Groups, 2021-2024. Data sourced from the Institute for Security Policy at Kiel University (ISPK) German Navy Fleet Tracker: <https://www.kielseapowerseries.com/en/fleet-tracker.html>.

As table 1 shows, Germany has maintained reliable and sustained contributions to NATO's day-to-day maritime operations since before the announcement of *Zeitenwende*. The contributions and operational tempo have however been scaled up in the years after. SNMG1/SNMCG1 primarily operates in the Atlantic and Northern Waters and SNMG2/SNMCG2 in the Mediterranean Sea (ISPK, 2022). The most sustained German effort has been dedicated to SNMG2 and SNMCG1. Before the announcement of *Zeitenwende* contributions to SNMCG2 were close to non-existing, but the mine-clearing vessel *Bad-Rappenau* was deployed to the Black Sea under SNMCG2 in February 2022 after the Russian full-scale invasion of Ukraine. We find that this illustrates a shift in German operational practice spurred on by the war. In 2023 and 2024, however, Germany went back to not participating in SNMCG2, returning to normal operations in the Baltic Sea and North Atlantic.

The German Navy has furthermore contributed to supporting stability in Europe's neighbourhood through several long-lasting and new NATO and EU maritime operations. In the Mediterranean Sea, they have deployed forces to uphold the arms embargo on Libya through EUNAVFOR MED IRINI (EUNAVFOR, n. d.) and NATO Sea Guardian for capacity building and MDA (NATO, 2023). At the Horn of Africa Germany offers sustained contributions to Operation ATALANTA to counter piracy and protect vessels (EEAS, n. d.). In the Red Sea, Indian Ocean and Gulf, German Frigate *Hessen* was deployed to EU NAVFOR ASPIDES in February 2024 to maintain MDA and protect vulnerable vessels (Siebold, 2024; Tringham, 2024).

In line with the priority of Contributing to Maintaining the Rules-Based International Order, Germany has also deployed Frigate *Baden-Württemberg* and replenishment ship *Frankfurt am Main* to the Indo-Pacific for the RIMPAC-exercise in July/August 2024 (Bundeswehr, 2024a). The Indo-Pacific expedition has been described as: "the German Navy's most important defence diplomacy and enhanced security cooperation project this year" (Bundeswehr, 2024b).

The broad spectrum of maritime operations Germany has engaged in after the announcement of *Zeitenwende* appears harmonized with the strategy enshrined in the NSS and DPG. Fulfilling the role of global purveyor of maritime D&D as well as permanent and reliable presence "locally", however, is resource intensive. It puts significant strains on crews and increases the need for fleet maintenance. Related to this fact, the Bundeswehr have stated that "Sustained operations of low intensity, however, have a negative impact on the operational readiness and responsiveness required for national and collective defence. Therefore, assigning naval forces to international crisis management operations always calls for careful consideration" (Bundeswehr, 2023).

This statement illustrates the risk of overstretch and further indicates that Germany is cognizant of the issue. The risk has also been incorporated into the plan for maritime force development. The trade-off between operational capacity for national and collective defence in the Baltic Sea and North Atlantic and acting as a purveyor of maritime security elsewhere is significant (Stöhs, 2021). The trade-off is most pronounced when the activity is naval power projection on the other side of the globe as during RIMPAC 2024. For every sailor at sea there are 3-4 people employed in support functions (Interviewee 2). The very infrequent nature of operations like RIMPAC does however make it less of a risk to causing overstretch. The relative Russian maritime weakness in the Baltic Sea can also be considered to make the risk of overstretch less severe (Bruns, 2023).

Should Germany maintain a high level of ambition for presence in the Mediterranean, Red Sea, Gulf,

and naval power projection in the Indo-Pacific, while also maintaining a “permanent and reliable” operational pattern in the Baltic Sea and North Atlantic, it will risk overstressing its resources. Yet there are very strong indications and concrete developments pointing towards Germany assuming a more sustained military presence in the Northern Waters. In October 2024, Germany and the UK signed a “landmark” agreement on extensive defence cooperation known as the Trinity House Agreement (UK Ministry of Defence, 2024a). The agreement includes several areas of cooperation with great importance for the Northern European maritime domain: protecting critical underwater infrastructure in the North Sea, exploring new surveillance capabilities; periodic German P8-operations from Lossiemouth in Scotland and exploration and development of new Maritime UAS (UK Ministry of Defence, 2024b). The agreement with the UK furthermore indicated that Germany is willing to seek fruitful cooperation on matters of defence also with non-EU member states, which is relevant also for the Norwegian case.

At the same time, Germany is not part of the Joint Expeditionary Force (JEF) which is led by the UK and includes Norway, Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, the Netherlands, and Sweden. In addition to Germany, Poland is not a member of JEF, which raises questions as to how the force can operate effectively in the Baltic Sea (Arnold, 2024). Poland could ask to join JEF in the foreseeable future, but it is less likely that Germany will do so. Therefore, coordination between Germany and the UK – and Germany and JEF – will become a pertinent question, particularly with regards to effective protection of critical undersea infrastructure. Given JEF’s increasing salience in the Northern waters, Germany staying on the outside of this format limits the ability – for a nation seeking to lead on European security – to be present in the arenas where the most significant developments are taking place.

The decision by the UK and Germany to provide for operational cooperation with maritime patrol aircraft (MPA) in a formal agreement is still significant. The explicit description of the mission statement for the aircrafts being to “...help protect the North Atlantic” is a solid confirmation that Germany will enhance its presence in the Northern Waters. Statements made by senior Bundeswehr officers also point towards a future increase in German military presence in the North Atlantic. One opined that the vastness of the North Atlantic makes it suitable to utilize German P8s there together with close Allies. The interviewee also noted that Germany can largely rely on existing assets, infrastructure and sensors to maintain sufficient MDA in the Baltic Sea. It was also stated that both the TKMS212CD submarines and F127 frigates will be highly suitable for operations in the North Atlantic (Interviewee 2).

German contributions to low and mid-intensity operations and maintaining MDA together with the US, UK and Norway will show commitment to key Allies and foster improved interoperability and potentially *interchangeability* where it matters most. Developing interoperability and reaching mature operational relationships takes time but the German decision to increase its commitment in the North Atlantic is a significant step in the direction of fulfilling the grand aspirations enshrined in the Zeitenwende-speech and subsequent strategy-documents.

In addition to committing to future force contributions, Germany plans to offer increased capacity for command to NATO in the region. The establishment of the Baltic Commanders Conference in 2015 and subsequent creation of the German Maritime Forces Staff task force (DEU MARFOR) in 2019 were indications of the German ambition to assume a leadership role in securing the Baltic

Sea (Bundeswehr, 2021; n.d-a; Gehle, 2023). In October 2024 DEU MARFOR was absorbed by the Commanders Task Force Baltic (CTF Baltic) which is a German national Headquarters for maritime operations that can also function in the NATO Command structure. The command will gain capacity as it is further developed and can also serve a “supra-regional” role in NATO operations in the North Atlantic (Interviewee 2). Its main tasks will be to plan and lead naval exercises and operations of NATO partners in the Baltic Sea region as well as to compile a comprehensive maritime situation picture in support of allied situational awareness including movements of the civilian shipping traffic with an eye to potential threats (Schneider, 2024). As CTF Baltic matures, it could contribute to Germany’s ability to live up to expectations spurred on by the Zeitenwende speech and announced strategic aspirations. Simultaneously, it illustrates limits to the extent that Germany can take leadership in NATO. Due to, among other factors, the 1990 Treaty on the Final Settlement with Respect to Germany which prohibited stationing of foreign troops in the former GDR, the level of ambition for CTF Baltic is lower than in a scenario in which it would have been integrated as a maritime command *within* NATO structures (Klein, 2024).

German Maritime Rearmament

Germany is cognizant that assuming a more prominent role in D&D in its regional and close supra-regional waters requires “comprehensive capabilities”:

The particular characteristics of the maritime area of operations and the requirements resulting from the new NATO Force Structure demand comprehensive capabilities of the German Navy. These include operations in the open Atlantic Ocean as well as in the North and Baltic Seas (Bundeswehr, 2023).

To raise the German navy to an appropriate level of *comprehensive capabilities* it will undergo a significant rearmament and increase of capacity by 2035. The broad range of objectives Germany has set for itself in the maritime domain does however raise questions related to overstretch of resources, even with a more powerful maritime force structure.

The German Navy underwent substantial downsizing after the end of the Cold War. Going from around 35 000 personnel serving in the West-German fleet in the 1980s to around 15 500 personnel serving in the German Navy of 2024 (Bundeswehr, n.d.-b; IISS, 2024). During the later stages of the Cold War the Bundeswehr operated up to 24 submarines in contrast to the 6 Type-212A-units in operation today (Bundeswehr, n.d.-c; IISS, 2024).

Partly in response to the Russian annexation of Crimea in 2014, Germany started to refocus on maritime security in the Baltic Sea (Brake, 2024; Granholm, 2021). However, development of naval combat power remained modest. The capacity for Germany to project naval power and conduct low intensity operations also faced major challenges. The operational status of the fleet’s principal surface combatants (PSC) and submarines fluctuated, and at some points very few vessels were available for operations, including none of the submarines at one point in 2017 (Roblin, 2017).

The operational capacity of the German Maritime Forces is crucial with regards to the feasibility of increasing presence in the Northern waters while also continuing contributions to low and mid-

intensity operations globally. The planned future fleet is thus highly relevant for assessing the German potential for stable and sustained operations in the Northern Waters while also acting as a global purveyor of maritime security.

The plan for maritime force development published in May 2023 offers crucial insights into the planned future structure of the German maritime forces and composition of the fleet. The German Navy is to become “ready for the future” and a mix of manned and unmanned platforms is purported to make it so. The most important expansion from the 2031 plan is the addition of a substantial number of unmanned systems on the surface, subsurface and in the air. This is in line with broader technological advances in the defence sector and includes the development of semi-autonomous and autonomous weapons systems. According to the plan, the Baltic Sea requires such weapon systems with uninhabited capabilities. It also underlines that mass matters referring to the need to increase the numbers of platforms and systems (Gehle, 2023).

Capability	2024	2035
Principal Surface Combatants (Destroyers and Frigates)	11	15*
Patrol and Coastal Combatants (Corvettes)	5	6-9*
Submarines	6	9*
Mine Warfare	12	12
Logistics and Support	26	12*
Maritime Patrol Aircraft (MPA)	4	8
Unmanned Surface Vehicles (USV)	-	18*
Large Unmanned Underwater Vehicles (LUUV)	n/a	6
Unmanned Aerial Systems (UAS)	2	6
Rotary Wing Unmanned Aerial Vehicles (RWUAV)	-	22*

*Number of units depend on pending procurement-decisions.

Table 2. Current vs. future German maritime force. Data sourced from IISS, 2024; Bundeswehr, 2023.

PSCs provide substantial naval combat power and are key for assessing Germany's capacity for sustained regional and supra-regional presence in the future. The German Navy currently operates three types of PSC. The F123 Brandenburg-class for Anti-submarine-warfare (ASW), The F124 Sachsen-class for Anti-air-warfare (AAW), and the multi-purpose (stability) F125 Baden-Württemberg-class. In 2035, Germany plans to keep 3 out of 4 F125 frigates in operation and procure up to six F126 (ASW/Multi-purpose) and six F127 (AAW) frigates (Bundeswehr, 2023).

The design of the F126 is modular allowing for swapping of capabilities to fill various operational requirements. The modular design enables the frigates to engage in AAW, surface warfare and ASW, making it a true multi-purpose vessel (Buitendijk, 2021; Naval News Staff, 2024a; Newdick, 2023). A highly automated and low-maintenance design will purportedly enable the ship to operate continually for two years (Newdick, 2023). The robustness of the new F126 frigates can thusly contribute positively to the prospects of a high operational tempo for the future German fleet.

The F127 is currently in development and the design is in the process of being determined. Germany has an aspiration of collaborating with Allies on the F127 procurement and Norway is a potential partner. The frigates will be outfitted with the sophisticated and potent AEGIS combat management system which has proven very effective across Western navies since its inception. The AEGIS-system and accompanying capabilities can be acquired with different levels of potency and the "maximum firepower"-configuration is costly. However, this cost could be considered a necessary expense considering the current dire security landscape in Northern Europe. Anti-air directed energy (laser) technology (DEW) is also planned to be integrated into the F127 in the future (Luck, 2024). The F127's powerful anti-air properties could contribute to an ability to establish "safe zones" at sea or in littoral environments. This ability could be perceived as essential in future conflict scenarios where traditional and hypersonic missiles are serious threats. The F127 can also be fitted with towed sonar capability (Towed-Array Sonar) enabling key ASW-functionality that could make it a viable option for Norway. Norway is currently deciding which platform should replace the Fridtjof Nansen-class frigates. The plan is a procurement partnership akin to the ongoing 212CD procurement with a major ally. At the time of writing, Norway has selected the UK, the US, France and Germany as potential partners for procurement of frigates, and the decision will be made in 2025 (Norwegian Ministry of Defence, 2024).

The shift in the German focus towards unmanned systems from the 2031 plan to the Development Plan 2035 is profound. Many of the unmanned systems will rely on further technology development before getting fielded and in the document, the German Navy has stated an intent of contributing to testing such systems. Aiming to: "enable the testing of new unmanned capabilities in short time frames with a small number of commercially available prototypes (experimentation)" (Bundeswehr, 2023). Such testing is well underway and in November 2024 the German Navy concluded a two-week Operational Experimentation (OPEX) in the Baltic Sea with the cutting-edge Israeli BlueWhale autonomous underwater vehicle (Naval News Staff, 2024b).

The German Navy is also testing AI-systems to aid in tasking, collecting, processing, exploitation and dissemination (TCPED) of information to achieve better MDA in the Baltic Sea. The first phases of testing were conducted together with MARCOM and these activities are in line with the goal of developing capability to produce AI-enabled comprehensive situational pictures, purported to become a key asset in future naval operations (Bundeswehr, 2023; Interviewee 2). Such capability

does however require high-capacity digital infrastructure which could become an issue if such functionality is to be implemented at scale (Interviewee 2).

Germany's exploratory and proactive approach in the autonomy-sphere provides great potential for cooperation between Allies. The inclusion of cooperative initiatives within this area in the UK-German defence agreement of October 2024 also underpins this notion (UK Ministry of Defence, 2024b). It has furthermore been stated that the Bundeswehr has quite a forward-leaning approach towards Norwegian industry actors with relevant technology (Interviewee 2). Close allies with innovation ecosystems for autonomous military technology like Norway and the US could take notice of this and try to engage more actively at the government-level.

The emphasis placed on the NATO Multi Domain Operations (MDO)-concept in the Development Plan, viewed in relation with the proactive approach to unmanned systems and the massive amount of funds allocated to digitalization and networks in the Special Investment Fund, indicate that Germany is serious about getting "future-proof". MDO is planned to rely heavily on the merging of sensors and effectors in all domains and integration of unmanned systems is envisaged as a key factor for its success. Current developments points towards a force that, in theory, can function in accordance with MDO. However, the procurement and acquisition-efforts necessary to obtain the necessary equipment is massive and demands a substantial amount of funds and resources. A Bundeswehr-Interviewee noted that high, politically formulated, aspirations must be followed by resources, and the current political aspirations are not matched by a sufficient amount of resources (Interviewee 2). The Special investment fund will be spent by 2026 and formally end in 2028. In addition, the prospects of increased funding through the general defence-budget are uncertain.

German-Norwegian Maritime Defence Cooperation

Germany and Norway enjoy a tight relationship in security and defence policy, and as mentioned earlier Norway refers to Germany as its closest partner in Europe. The two countries have cooperated close for years as NATO allies, and defence relations started to fully blossom some years prior to Olaf Scholz' announcement of Zeitenwende for Germany in 2022. The decision to cooperate on the development, procurement, maintenance and operation of the new TKMS212CD submarines was made in 2017 (Norwegian Government, 2017). The project reached an important milestone in the summer of 2024 when the Critical Design Review (CDR) was completed, marking the end of the design phase (Norwegian Government, 2024a). Construction of the vessels is underway for the four units to be delivered to the Norwegian navy from 2029 onwards. The most recent Norwegian long-term plan for defence states an upscaling to at least five submarines with an option for acquiring a sixth (Norwegian Government, 2024c). Germany is also looking into upscaling its order, considering procuring 4 additional units which would bring their total to 6 (NDR, 2024). The successful progression of the project is highly important for both Norway and Germany, and indicates well-functioning cooperation on the political level, military-to-military and between industry actors.

Another important collaboration between Norwegian and German militaries and industry is the development and procurement of a new supersonic naval missile. The SuperSonic Strike Missile (3SM) Tyrfing is planned to be ready for delivery in 2035 and the Norwegian company Kongsberg Defence & Aerospace is leading the endeavour in partnership with German industry actors Diehl Defence and MBDA Deutschland. In addition, The Norwegian Defence Research Establishment (FFI) and Nammo will participate in the development process (Norwegian Ministry of Defence, 2023; Kongsberg Defence & Aerospace, 2023; 2024a; 2024b).

In addition to significant collaboration on procurement-projects there has been sustained operational cooperation that will only be strengthened in the future. The German plan to contribute its P-8s to increase MDA in the North Atlantic and the arrival of the TKMS 212CD submarines from 2029 onwards being key elements. Germany and Norway have also put protection of critical undersea infrastructure (CUI) high on the political agenda since 2022. The two countries interests align closely in this area since petroleum infrastructure is vital for the economies of both countries.

The political will to enhance protective measures of CUI particularly gained momentum after the Nord Stream pipelines sabotage in September 2022. The will has been turned into concrete initiatives with Norway and Germany being instrumental for the establishment of the NATO Maritime Centre for Security of Critical Undersea Infrastructure (Norwegian Government, 2022; MARCOM, 2024). In October 2024, German-Norwegian efforts to protect CUI were further enhanced with the proposal of five regional CUI Hubs for increased MDA, presented jointly by defence ministers Gram and Pistorius. Norway has offered to implement a hub for the High North and Germany for the Baltic Sea (Norwegian Government, 2024b). The joint efforts of Norway and Germany to enhance protection of CUI undertaken after the Nord Stream sabotage is a clear expression of their close partnership and

cooperation in security- and defence matters and their aligned security interests. At the same time the establishment of several CUI's with different geographical scopes means that making full use of their inherent potential is dependent on functioning horizontal cooperation and integration across CUI's. The CUI hubs are still only rather vague configurations, and a range of difficult questions must be answered with regards to structure, a range of involved actors and public/private cooperation.

Political uncertainties in Germany

Given the major changes promised by Germany in security and defence, several political developments domestically will impact the extent to which it all comes into fruition. Federal Chancellor Olaf Scholz' Zeitenwende speech on 27 February 2022 raised high hopes in Germany itself and among allies and partners that Germany would now be willing and able to assume a leadership role in European security and defence. Germany indeed started implementing a number of profound changes in its security and defence policies, such as increasing its support to Ukraine significantly, sanctioning Russia and reaching NATO's two percent goal for defence spending. However, these hopes have not materialized fully thus far and, although the process has generated some progress and improvement of Germany's defence capabilities. As we see in the case of the German Navy, it quickly became obvious that both external and domestic expectations projected in the Zeitenwende have been exaggerated (Keßler, 2023). Currently, the process is stagnating somewhat, and it seems to be difficult to maintain the willingness and interest in implementing the changes and treating the Zeitenwende as an urgent matter. In respect of military support to Ukraine, Olaf Scholz has often been blamed for doing too little too late, taking on a rather hesitant stance, especially concerning big weapon systems such as tanks and Taurus cruise-missiles.

It seems especially difficult to make higher defence spending sustainable in the long term and to meet NATO's two percent target once the special fund has expired in 2027/28 while the regular annual defence budget is frozen at around €50 billion until 2026 (Puglierin, 2024). In this context, the budgetary mechanism that limits German federal spending, the *Schuldenbremse*, has been described as a significant obstacle to living up to expectations in security and defence. Regardless of budgetary technical considerations, the need for increased funding is considered apparent by some. Defence Minister Boris Pistorius has called for exempting the Bundeswehr from the *Schuldenbremse* (NTV, 2024). Others have advocated for establishing a second, exempt, special investment fund (Balling, 2024). Roderich Kiesewetter, MP and defence expert for the CDU, suggested a new fund worth 300 billion Euro for making the Bundeswehr war-ready (Frankfurter Allgemeine Zeitung, 2024). One interviewee noted that the Bundeswehr needs budgets that makes it possible to plan long-term (Interviewee 2), thus a guarantee for strong and sustainable funding over a longer period of time.

Although a majority of Germans supported the increase in defence spending – in June 2024, 57 and 56 percent were in favour of a further increase of the financial respectively personnel recourse of the Bundeswehr (Pfitzner, 2024) – it might become an issue once this will come at the cost of for example social benefits, thus imposing hardship on Germans. The tough political debates are thus only to come (Puglierin, 2024). Also, parts of the German public are not very keen on the idea of Germany taking on a military leadership role (Keßler, 2023). Both right- and left-wing parties that are critical of NATO and EU and military support for Ukraine and show a pro-Russia stance, have gained massive support in the latest regional elections in several East German states. Especially in Eastern Germany, many people feel uncomfortable with the financial and military support for Ukraine which is especially interesting in the light of the upcoming snap federal elections in February 2025.

In November 2024, the German three-party coalition government representing partly very divergent interests and views from its very start in late 2021, collapsed. It did so after the social democratic Federal Chancellor Olaf Scholz dismissed the liberal Minister of Finance Christian Lindner. This was not a result of Trump's victory but longstanding disputes among the partners, the Liberal Democrats (FDP) on the one side and the Social Democrats (SPD) and the Greens on the other. They mainly concerned the state budget, new debts – for example for funding fresh weapon deliveries to Ukraine, and in this context the *Schuldenbremse* (see above) – and Germany's general economic direction. After the FDP left the government, SPD and the Greens continued as a minority government. A lost vote of confidence in the Bundestag on 16 December 2024 opened, in line with the constitution, the door for snap elections. A date for those has already been set for 23 February 2025, about half a year earlier than regularly scheduled.

According to current opinion polls, the Christian Democrats (CDU/CSU) with Friedrich Merz at its helm, since 2021 in opposition after having been in government under Federal Chancellor Angela Merkel for 16 years, has a likelihood of winning 30 to 34 percent of the votes, which is a rather large margin. The right-wing populist Alternative für Deutschland (AfD), the SPD and the Greens, follow at between 14 and 18 percent (wahlrecht.de). The FDP is struggling to stay above the 5 percent threshold which is required for parliamentary representation. Although being likely to become the biggest party and gaining the right to form a government, the CDU/CSU is unlikely to acquire a majority of its own or with its traditional coalition partner FDP. A coalition with the far-right AfD has been excluded by internal party guidelines. Therefore, a likely outcome will be a coalition with the SPD (a so-called "grand coalition" that has already been governing the country between 2005 and 2009 as well as 2013 and 2021) or with the Greens (or both), depending on the individual results being sufficient for a majority. None of these options are very popular. A grand coalition usually stands for far-reaching compromises with little movement into one or the other direction. A coalition with the Green Party meets great opposition in parts of the CDU, and particularly its Bavarian sister party CSU. For many in these circles, the Greens are too left-wing and have a reputation of adhering to state-centrism and paternalism.

While there are significant differences in these parties' economic, energy, migration and social policies, both parties share views in their foreign and security policies. The CDU/CSU stands for more military support for Ukraine, including the delivery of Taurus, modern tanks and fighter jets, and a strong and sustainable funding of the Bundeswehr. This distinguishes them from parts of the SPD. CDU/CSU are also strongly committed to international security cooperation within NATO and the EU as well as on the bilateral level including countries such as Norway. While Federal Chancellor Scholz and the SPD were reluctant to strive for an international leading role by Germany, CDU/CSU are more ambitious in this regard backed by Vice-Chancellor Robert Habeck of the Green Party who spoke out in favour of Germany taking on such role after Donald's Trump victory in the US presidential elections (Deutschlandfunk, 2024).

In whatever constellation, a CDU having won the elections with a big margin is likely to enforce at least some of its ideas over their much smaller coalition partner(s). CDU/CSU wants to maintain the *Schuldenbremse* but at the same time spend more money for defence and for Ukraine, which naturally can only go at the cost of other budget posts. However, Germany is in dire need of heavy public investments in other areas such as infrastructure, the health sector and education. More funds for defence and security will imply cuts in social benefits, thus there will be hard negotiations

between the partners which could delay the necessary investments considerably. Still, with the CDU/CSU as the biggest party in parliament and government there is a fair chance that the Zeitenwende will be manifested, even further elaborated and accelerated.

While observers feared a political standstill until the elections, at least several laws are still to be adopted and several projects in the defence sector to be approved. There is a good chance that about 40 projects above the 25 million Euro threshold, of which 24 projects have already been pointed out, will still officially be approved by the parliament's budget committee before the end of 2024. Some of these investments will be allocated to the Navy. The acquisition of four frigates F127 worth 7,5 billion Euro, possibly even four worth 15 billion, will be part of this deal (Frank, 2024). Thus, the transition and strengthening of the German Navy is continuing and is likely to continue on this path also under a new government.

Conclusion

In this report we have sought to answer two questions. First, how has the German approach to deterrence and defence in the Baltic Sea and North Atlantic developed since the announcement of the Zeitenwende in 2022? Second, how can Norway and Germany enhance maritime cooperation bilaterally, and in a transatlantic multilateral context? Several conclusions can be drawn out of the analysis.

In the years after the announcement of Zeitenwende, Germany has managed to maintain a sustained operational pattern in the Baltic Sea and North Atlantic while also contributing to EU-operations in the Mediterranean and Arabian Gulf as well as an Indo-Pacific expedition. The depth of their sustained contributions in the Northern waters has been important and the ongoing shift in operational focus points towards increased presence in the future. Germany's renewed and advanced fleet of P-8 MPAs, the TKMS212CD submarines and the F126/F127 frigates will all be utilized in the Northern waters in the future. These assets will be operated in close cooperation with Norway, UK and the US and significantly improve NATO's ability to deter and defend in Northern Europe. Germany is even willing to take on a leading role in maritime operations in the Baltic Sea as manifested by the inauguration of the Commanders Task Force Baltic (CTF Baltic) which as a German national Headquarters for maritime operations can also function in the NATO Command structure. A new government, to be installed after the federal elections on 23 February 2025, is likely to continue along those lines.

The broad and resource intensive operational pattern of the German Navy indicates that the risk of overstretch could be looming. Particularly if Germany is to realize their announced strategic objective of being a permanent and reliable pillar of collective defence in Europe. One key opportunity cost of deploying across the world and naval power projection for defence diplomacy purposes is less depth in defence cooperation and integration with key Allies like the US, UK and Norway in the North Atlantic. To fulfil the strategic objective of being a permanent and reliable pillar of conventional defence in Europe, Germany should continue increasing the depth of its maritime presence and defence cooperation in the Northern waters. Permanent and stable engagement and cooperation, especially with smaller countries such as Norway and the other Nordic countries, is important for credible D&D in the region. So far, it has been rather ad hoc and driven by external events. This policy change towards a stronger presence in its near neighbourhood might entail lowering ambitions in other regions of the globe. It could also entail prioritizing integration with key allies at the expense of resource intensive naval power projection. In sum, the range of new initiatives we have discussed in this report, steps taken in procurement, operational planning, and politically will bind Germany and Norway together in close maritime cooperation for years to come.

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