

Introduction

On a previous paper published in 2024, which discussed the present and future of the Alliance's maritime posture, I discussed the need for «a new allied maritime strategy that underscores all current challenges at sea for allied navies and informs national governments on the most pressing needs for their navies».¹ Almost two years later, the Alliance has finally published an update to the 2011 Allied Maritime Strategy (AMS).²

The new update comes at a time when the war in Ukraine is well into its fourth year, the negative effects of the Red Sea crisis still linger across the waters of the Gulf of Aden and the Red Sea, and the Western Indian Ocean has seen a mild increase in piracy cases. Additionally, China continues to move closer to the Russian Federation with regular naval exercises conducted throughout the year, while the size of its Navy and Coast Guard continues to grow, and displays of a hostile attitude towards its neighbors in the South China Sea region become ever more regular.

The 2025 version of the AMS, albeit an update of the original document, provides important insights into the change of direction the Alliance is taking at sea. Thus, as a continuation of «Sailing Rough Seas: NATO's Maritime Posture», this paper delves into the AMS, comparing the two versions and exploring the most important aspects of the 2025 update. It then follows with some comments and takeaways regarding the latter, including those aspects which could have benefited from a deeper treatment, and the challenges ahead for the Alliance.

On Maritime Strategy and Sea Power

NATO remains fundamentally a maritime alliance by virtue of its geographic configuration, with Europe as an appendix of the large Eurasian landmass thrown out to sea and with the Atlantic as the connecting fabric holding together allies on both sides. Thus, the Alliance needs a maritime strategy insofar as stability and the free flow of goods and services around its maritime periphery depend on sea power.

¹ VÁZQUEZ ORBAICETA, Gonzalo «Sailing Rough Seas: NATO's Maritime Posture», *Opinion Paper IEEE* 28/2024, 11 March 2024, https://www.ieee.es/Galerias/fichero/docs_opinion/2024/DIEEEO28_2024_GONVAZ_Otan_ENG.pdf. 18.

² NATO. «Alliance Maritime Strategy», 29 October 2025. Available at: <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2025/10/29/alliance-maritime-strategy> (Consulted 12 December 2025).

Maritime strategy can be broadly understood, following Professor James Holmes, as «the art and science of using sea power to fulfill purposes related to the sea».³ It is the main instrument with which to define the strategic and political ends sought, as well as the means that are necessary to attain them and the ways of doing so. Unlike at the national level, developing a maritime strategy for an Alliance like NATO, with 32 Member States (each with their own political objectives and different strategic realities) is by no means a minor challenge. Each individual member’s sea power is shaped and influenced in a unique way based on several aspects, including physical, geopolitical and ideational factors (Figure 1).

Figure 1: Geographical Factors Influencing Sea Power (Source: Author’s elaboration adapted from Germond).⁴

Types of Factors	Nature of the Influence
Physical Factors	- Shape, nature, length of coastline - Easy access to main SLOCs
Geopolitical Factors	- Security and Stability at one’s own borders - Access to/control of naval bases/chokepoints
Ideational Factors	- Continental vs. Maritime Strategic Culture

Within NATO sea power, aligning and coordinating the contribution of all members remains a primary concern. Besides, Europe plays a role just as important as its allies on the other side of the Atlantic. Despite the declining trend seen during the last three decades, extensively discussed and explained by Jeremy Stöhs, Europe and its navies remain an important asset with significant potential. As asserted by Professor Geoffrey Till:

Its [Europe’s] total economy is in the same league as that of China and the United States, and far superior to Russia’s. Its maritime industries remain substantial and notably innovative. Its collective naval force is already potentially impressive and likely to get more rather than less so. The key question is how well coordinated those strengths are across

³ HOLMES, James R. «America is Finally getting its Maritime Strategy right», *The National Interest*, 14 June 2025. Available at: <https://nationalinterest.org/feature/america-is-finally-getting-its-maritime-strategy-right> (Accessed 16 August 2025).

⁴ GERMOND, Basil. *The Maritime Dimension of European Security: Seapower and the European Union*. Palgrave Macmillan, 2015. 20.

the European continent.⁵

In such context, European navies have been struggling for some years now as they strive to expand the size and capabilities of their fleets while battling with ever-limited budgets for it. The consequences of low investments in naval power during the past few decades has have become visible in the Red Sea, where allied navies have been unable to put an end to the attacks in an effective way.⁶ The crisis has seen many European navies involved to provide escort and support to any merchant vessel threatened by the Houthis, though attacks on land targets were only carried out by the U.S. and British forces.

The struggles experienced in the Red Sea have reminded Europe and the world that sea power requires constant commitment and steady investments in order to achieve its desired strategic purposes. In light of this, it is evident the Alliance will need a coherent and rational vision to drive its efforts at sea, one which, as will be examined in the following sections, it has sought to provide with the publication of the Alliance Maritime Strategy (AMS) from 2011 and its 2025 update.

2011 Alliance Maritime Strategy

Two decades after the Cold War came to an end, the Allied Maritime Strategy (AMS) was published in 2011, linked to the 2010 Strategic Concept. The AMS is the first official Alliance document published under that name, although for practical purposes some consider the US Maritime Strategy of the 1980s to be an influence on the Alliance's maritime and naval strategy during that time.⁷ The very brief document mainly describes a maritime environment characterized by cooperation.

Thus, as already emphasized in its first lines, «the maritime environment lends itself well to strengthening commitment to cooperative security».⁸ Four fundamental pillars are identified on which allied maritime activity is configured, which are in turn ways of using

⁵ TILL, Geoffrey. «Foreword», in STÖHS, Jeremy. *European Naval Power. From Cold War to Hybrid Wars*. Palgrave Macmillan, 2024. X.

⁶ On the Red Sea crisis, see: ROMERO JUNQUERA, Abel. «The Red Sea Crisis. Analysis from a Maritime Dimension», Analysis Paper IEEE 16/2025, 4 March 2025. Available at: https://www.defensa.gob.es/ceseden/-/ieeee/la_crisis_del_mar_rojo_2025_dieeee16.

⁷ See: HATTENDORF, John B. and SWARTZ, Peter M. «U.S. Naval Strategy in the 1980s». *U.S. Naval War College, Newport Paper*, No. 33, 2008. Available at: <https://digital-commons.usnwc.edu/usnwc-newport-papers/33>.

⁸ NATO, 2011.

joint capabilities: deterrence and collective defense, crisis management, cooperative security (focused on agreements and naval diplomacy), and maritime security.⁹

The strategy elaborates a brief description of the maritime environment at that time, in which, as we have said, cooperation and globalization are essential features. Stressing the need to protect freedom of navigation, maritime trade, critical underwater infrastructure, and other issues related to marine resources, the WHA also recognizes that the oceans are increasingly accessible to illicit activities such as organized crime, drug and human trafficking, or piracy (which precisely at that time, was at all-time highs in places like the Horn of Africa).¹⁰

Despite its great contribution at the time of its publication and the fact that it was designed to maintain its validity over time, the AMS became outdated a short while after its publication. Proof of this is the lack of references to China or Russia, which are not mentioned at all in the document, despite the 2022 Strategic Concept would go on to describe them as "the most significant and direct threat to the security of allies and to peace and stability in the Euro-Atlantic space";¹¹ while placing China as a challenge to common interests and values due to the lack of transparency that characterizes its strategy and intentions, and its use of malicious irregular operations.¹²

Both countries have also made great efforts to strengthen their naval and maritime capabilities in recent years, something that in the 2020s made evident the need for a strategy to manage the aforementioned challenges as well as others.

The 2011 AMS was an important step in aligning the main ideas of the 2010 Strategic Concept with the joint maritime posture, but its contributions soon became largely obsolete. The document has a markedly different tone and approach from its American predecessor of the 1980s, although this is mainly due to the fact that it responds to totally different strategic contexts. While the 2011 Revolution is mostly oriented towards maritime security and cooperation, the 1980s Revolution focuses much more on a naval strategy aimed at deterrence given the nature of the threat posed at the time by the Soviet fleet under the leadership of Admiral Gorshkov.

⁹ NATO, 2011.

¹⁰ NATO, 2011.

¹¹ NATO, 2022, 3

¹² NATO, 2022, 5

Thus, despite the fact that the document was of great value at a political-strategic level, since the invasion of Crimea in 2014, the Alliance has seen since its publication the emergence of new threats at sea, including the vulnerability of critical undersea infrastructures to irregular tactics¹³ or the various threats to freedom of navigation in the Red Sea and the Indian Ocean. The current trade crisis, aggravated in the case of NATO by the shrinking trend of its merchant and fishing fleets,¹⁴ and to which could be added a possible upturn in the incidence of Somali piracy, has once again reminded us of the dependence of the global economy on maritime routes and the chokepoints through which they transit.

The rapid deterioration that the maritime environment has experienced over the last two decades – described, as previously said, in previous works – adds to the eminently maritime nature that the conflicts have acquired and the current context of confrontation between great powers. All this has made it imperative to have a new strategy to restore a greater role to navies as a central element of deterrence and protection of the main maritime lines of communication.¹⁵

2025 Updated Alliance Maritime Strategy

As said, the 2025 updated Allied Maritime Strategy was published in October 2025. The new document brings a visible change in language, though it has kept some parts relatively unchanged from its predecessor. A quick glance at it reveals the Alliance is gradually going back to speaking the language of power. In fact, as a reference, maritime power/projection of power is mentioned 17 times, 15 more than in the 2011 version.

As is stated in the opening paragraphs, the updated strategy aspires to provide «an overarching reference for delivering the ways and means of maritime power to contribute to achieving NATO's objectives» over the following years.¹⁶

¹³ In early 2024, NATO launched Operation Baltic Sentry to bolster maritime vigilance around those regions most affected by these threats.

¹⁴ VÁZQUEZ ORBAICETA, Gonzalo «NATO's Missing Merchant Ships», *Center for European Policy Analysis*, 18 July 2025. Available at: <https://cepa.org/article/natos-missing-merchant-ships/> (Accessed 23 July 2025).

¹⁵ VÁZQUEZ ORBAICETA, Gonzalo (2024) «Estrategia Marítima Aliada: Algunos Apuntes», *Revista General de Marina*, Vol. 287, No. 3, 563-574.

¹⁶ NATO. «Alliance Maritime Strategy».

The first broad section is devoted to the strategic environment. When compared to that in which the 2011 strategy was drafted, 14 years later the picture is quite different:

The global security environment is contested and unpredictable, with threats and other challenges emanating from state or non-state actors. Maritime crises and incidents illustrate the importance of the maritime domain to NATO as a transatlantic Alliance. NATO is united and steadfast in its resolve to protect its one billion citizens and therefore must be prepared to “fight tonight” and “fight tomorrow”.¹⁷

The two main threats identified are Russia and terrorism, the latter in all the different shapes it may take. Additionally, the PRC, the changes brought by AI and technology, and climate change are also highlighted. Russia «is the most significant and direct threat to Allies’ security». It relies on a mix of «conventional and nuclear capabilities, while carrying out increasingly aggressive destabilizing cyber and hybrid actions against the Alliance and its partners». Furthermore, «Its capability to disrupt Allied reinforcements, to hinder freedom of navigation and to avoid sanctions, remains a strategic challenge to the Alliance». ¹⁸ The portrayal of Russia is concise, straightforward and clearly done.

So is the inclusion of China, which has grown to become a central challenger to the status quo since the publication of the previous strategy. Indeed, China’s «stated ambitions and coercive policies challenge our interests, security and values. It poses systemic challenges to Euro-Atlantic security. The PRC’s confrontational rhetoric and disinformation target Allies and harm Alliance security». ¹⁹

The driving theme throughout the strategy is the vision that «NATO will have the maritime power required to uphold freedom of navigation, safeguard vital sea-lanes, protect critical infrastructure, and contribute to deterring and countering emerging threats and challenges across all domains». ²⁰ It highlights the crucial importance of maritime power to ensure credible collective defense, in what is probably one of the best definitions of sea power and its importance ever seen in official NATO publication:

Alliance maritime power, supported by effects from other domains, provides freedom of action across multiple domains and in all three dimensions. Maritime forces, with their unique characteristics, such as reach, flexibility, poise, deterrence, deployability and

¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ Ibid.

²⁰ Ibid.

mobility, amphibiosity, readiness, interoperability, sustainability and security, have scalable utility across the Peace — Crisis — Conflict continuum.²¹

The second part outlines the three main pillars of maritime power's contribution to Alliance's security. The three pillars, with a slight change are quite similar from the 2011 strategy: *deterrence and defense*, *crisis prevention and management*, and *cooperative security*. In each of them, the strategy outlines how allied maritime power will contribute to it.

The first is **deterrence and defense**. Together with existing concepts and defense plans, maritime power will to contribute with the first pillar by providing:

- a) Credible nuclear deterrence from the sea;
- b) Sea control, power projection, and sea denial;
- c) Assured maritime access, freedom of navigation, maneuver and action in the maritime domain;
- d) Protected sea-lanes and critical maritime infrastructure with a focus on securing undersea infrastructure; and
- e) Hard power required to prevail in conflict.²²

It sets 18 tasks to pursue the attainment of such objectives, including the contribution to credible nuclear deterrence, and the ambition of further developing «carrier strike, anti-submarine, naval mine warfare and seaborne autonomous capabilities to support NATO's ability to deter, defend, or decisively strike against an aggressor».²³

The second pillar is **crisis prevention and management**, an area in which allied navies have had certain experience over the past decades responding to humanitarian crises and natural disasters. Among the paths of action to ensure the attainment of the objectives in this field, the strategy outlines 6 key tasks, including the aspiration to «leverage the inherent agility of its maritime forces to conduct flexible and scalable maritime security operations that prevent or respond to emerging crisis situations and ensure freedom of navigation at sea». Equally important is the will to «rapid response maritime forces able to operate in littoral environments», which are expected to become

²¹ Ibid.

²² Ibid.

²³ Ibid.

increasingly complex and threatening the following years.²⁴

The third pillar is **cooperative security**. It sets six objectives, which revolve around fostering multilateral cooperation, improving situational awareness, and conducting diplomatic activities oriented towards upholding the rules based international order. Much like in 2011, the strategy seeks to «make an important contribution to NATO’s policy of outreach through partnerships, dialogue and cooperation», doing so in parallel to individual activities of similar nature undertaken by member states on their own.²⁵

The last section discusses in brief the implementation of the strategy. It highlights the role of the Standing Naval Forces (SNFs), which remain a vital tool of the Alliance’s maritime posture to build a credible deterrent.²⁶ It also highlights the importance of integrating digital transformation processes and the need for a shift in mentality that emphasizes the training and exercises with a view to «fight tonight» y «fight tomorrow».

The document’s conclusions broadly highlight the relevance of naval power in the pursuit of collective security interests restating the central goal moving forward: «NATO’s maritime power will contribute to the Alliance’s three core tasks, in an interconnected and contested future operating environment».²⁷ Altogether, the updated AMS constitutes a step forward for the Alliance when it comes to articulating a vision for its maritime posture in a more contested and rapidly changing maritime environment, but it will demand a strong commitment to turn such view into solid reality. Several aspects demand a more detailed analysis in this regard.

General Considerations

NATO has been in dire need of a refreshed vision for its maritime strategy for a long while. Thus, in broad terms, the text must be seen as a positive input. As always, the fact that the strategy must touch upon common ground among all 32 member states has a bearing on the overall product, but it is true that it has a new tone reflecting ambitions in a much clearer way, and a set of steps to achieve the desired strategic objectives. Nevertheless,

²⁴ Ibid.

²⁵ Ibid.

²⁶ Although it should be mentioned that the SNMGs are going through a period of lower investments in terms of the number of units and total assets devoted to them.

²⁷ NATO Alliance Maritime Strategy.

there are still some aspects which deserve further examination.

First, the strategy could have benefited from drawing a distinction among the different bodies of water which make up its maritime backyard. Even though the most significant threats and challenges found across those regions can be found in the document to some extent, there are no specific mentions to the Baltic, the Mediterranean, or even the Arctic. In the case of the latter, only the High North is mentioned in passing in the section discussing climate change. The Alliance is a collective entity, but there are sharp differences in the strategic reality of each of its bodies of water. Thus, providing a more in depth outline of each region could have contributed to strengthening threat perceptions among allies which lie distant from one another.

Second, while terrorism at and from the sea receives particular attention as the central asymmetric threat to allies and partners, the strategy does not mention the Red Sea crisis. Considering the important insights it has left, particularly for those navies which have deployed to the region to defend freedom of navigation, it is surprising to see no explicit reference to it or the ongoing effects which still linger in the region.²⁸ Over the following years, littorals are set to become increasingly contested with the so-called democratization of A2/AD capabilities, enabling actors such as the Houthis to exert a certain degree of sea denial.²⁹ In other words, allied navies will find their ability to obtain sea control contested by actors without a navy.

In a similar way, the protection of critical undersea infrastructure from hybrid attacks has gained more prominence as compared to the 2011 document. However, in light of recent events in the Baltic Sea, where numerous incidents with undersea cables and Russia's Dark Fleet have been taking place almost on a regular basis,³⁰ it comes as a surprise that the issue has not been address with more depth – especially considering Operation Baltic Sentry was launched a year ago.

²⁸ VÁZQUEZ ORBAICETA, Gonzalo «Is Western sea power adrift?», *Center for European Policy Analysis*, 7 November 2024. Available at: <https://cepa.org/article/is-western-sea-power-adrift/> (Accessed 15 August 2025).

²⁹ DUNLEY, Richard «The End of the Age of Transoceanic Navies? Democratization of A2/AD and the Relationship Between Land and Sea Power». *The RUSI Journal*, 169 (4). <https://doi.org/10.1080/03071847.2024.2391354>.

³⁰ MUÑOZ ABAD, Rafael J. «El fenómeno de la flota fantasma y sus riesgos para España», *Real Instituto Elcano*, 28 July 2025. Available at: <https://www.realinstitutoelcano.org/analisis/el-fenomeno-de-la-flota-fantasma-y-sus-riesgos-para-espana/> (Accessed 15 August 2025).

Third, NATO navies need more ships. The strategy mentions in passing that allied navies will have to grow the size of their fleets («by increasing maritime readiness, posture and mass...») While this may be taken as an implicit acknowledgement that the current naval capabilities do not suffice to meet existing threats, the role of the shipbuilding industry and its contribution to Allied maritime activities has also been left out of the document. Considering that most countries and their navies are currently battling to resource their shipbuilding industries and enhance partnerships between industry and the military to drive innovation, it comes as a surprise that the topic (as well as recruitment) has been avoided completely.

Fourth, at the risk of sounding obvious, it bears repeating that the strategy is maritime, not naval. There is an emphasis on hard power at sea, and the role of naval capabilities, and rightly so. But the predominant attention placed on naval power throughout the strategy contrasts with the very little attention paid to other aspects of allied maritime activities at sea beyond the purely naval dimension, in spite of them being just as important.

For example, member states' merchant fleets are going through a complicated period in terms of total shipping capacity and availability of seafarers.³¹ Adding to it, the need to address problems such as the growing proportion of flags of convenience (FOC) among their fleets, which in most cases are on the rise, will demand careful attention and effective policies.³² These are problems with serious logistical implications which could potentially hinder deployments in case of conflict and are left out of the strategy.

Lastly, and beyond the content of the strategy itself, visibility is key for an alliance like NATO. It is important regarding naval deployments and operations, but it is just as important with strategic documents. As the AMS suggests, «coherent Alliance strategic communication is essential in explaining NATO's efforts in the maritime domain».³³ Sea power is not cheap, and navies are expensive to build and maintain. Thus, it behooves policymakers and senior officials to make sure the taxpayers are fully aware of this and

³¹ NAUTILUS INTERNATIONAL. «NATO Member States' Merchant Fleets and Seafarers». *Nautilus International & IOMMP*, May 2025. Available at: https://www.nautilusint.org/globalassets/my-nautilus/member-resources/pdfs/nato-report/report_nato_may_2025_v11.pdf.

³² VÁZQUEZ ORBAICETA, Gonzalo «NATO's Missing Merchant Ships», *Center for European Policy Analysis*, 18 July 2025. Available at: <https://cepa.org/article/natos-missing-merchant-ships/> (Accessed 13 August 2025).

³³ NATO (2025) «Updated Alliance Maritime Strategy».

understand the importance of investing in national maritime statecraft. As the ever-insightful Commander Salamander has aptly asserted, «the AMS is a solid, compact briefing document that we should be handing out like pamphlets at the church door on Sunday.³⁴

Conclusions

14 years later, NATO has finally updated its Alliance Maritime Strategy. Shortly after 2011, changes in the maritime environment gradually left the AMS outdated and in need of a revision, particularly with the publication of the 2022 NATO Strategic Concept. The update, being precisely that, builds on its predecessor and updates the Alliance's vision to reflect the changes in the strategic environment and the threats which have emerged since then.

After missing their place (understandably) in the 2011 AMS, Russia, terrorism and the PRC are now central concerns in a world that is no longer stable nor defined by international cooperation at sea. On the contrary, the drastic deterioration of the strategic environment at sea has been aggravated by the emergence of asymmetric threats with potential to hold at risk some of the world's most important lines of communication.

The new update succeeds in defining the strategic ends its sea power must strive to achieve, as well as some of the ways in which to do so. It has a more concise language, with accurate and straightforward descriptions of the threats faced at sea. In keeping the pillars of its sea power almost unchanged, it builds on its predecessor to provide a refreshed vision for its members to follow.

However, some aspects of it would have benefited from more attention, particularly those that stand outside the purely naval dimension. The current state of allied merchant fleets and sealift capabilities, the challenges faced by the shipbuilding industry in the quest to expand the size of its navies, or a more region-specific approach in the description of the strategic environment would have made a much more solid document.

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³⁴ CDR Salamander «NATO has a new Alliance Maritime Strategy», *Substack*, 26 August 2025. Available at: <https://cdrsalamander.substack.com/p/blue-has-a-new-alliance-maritime> (Accessed 27 August 2025).