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## **From Regional Forums to NATO Alignment: Institutional Adaptation in the Context of Sweden and Finland's Accession**

### SUMMARY

Russia's invasion of Ukraine in early 2022 reshaped the foundations of European security. In response, Sweden and Finland abandoned decades of military nonalignment and transitioned towards NATO membership. This paper examines how, during the accession process (2022–2023), Finland and Sweden strategically reframed existing regional institutions, such as NORDEFECO, the EU's Common Security and Defence Policy, NATO-EU coordination mechanisms, and Nordic-Baltic forums, into instruments of alliance influence and normative action. Drawing on postulates of alliance theory (Walt's balance-of-threat and Snyder's alliance security dilemma), institutional regionalism, and theories of security alignment under crisis (Lake's hierarchy model and Acharya's regional security frameworks), we analyse how functional cooperation forums were transformed into platforms for strategic signalling, anticipatory coordination, and "soft deterrence". Official statements and political speeches show that regional forums were used to demonstrate unity, coordinate defence efforts, and maintain deterrence throughout the period leading up to complete NATO integration. Partnerships that had previously focused on technical or economic cooperation took on a new role, helping align Nordic defence practices with those of allied

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structures and providing political legitimacy for the security transition. In this context, regional institutions acted as a bridge towards formal military alignment, supporting collective defence before treaty commitments were in place.

*Keywords:* NATO enlargement, Nordic cooperation, institutional adaptation, NORDEFCO, Article 42(7), alliance theory, security alignment.

## Od regionalnih foruma do usklađivanja sa NATO: institucionalna adaptacija u kontekstu pristupanja Švedske i Finske

### SAŽETAK

Ruska invazija na Ukrajinu početkom 2022. godine preoblikovala je temelje evropske bezbednosti. Kao odgovor, Švedska i Finska napustile su višedecenijsku vojnu nesvrstanost i usmerile se ka članstvu u NATO. Ovaj rad analizira kako su Finska i Švedska, tokom procesa pristupanja NATO (2022–2023), strateški preoblikovale postojeće regionalne institucije, poput NORDEFCO-a, ZSBP EU, NATO-EU mehanizama i nordijsko-baltičkih foruma, u instrumente političkog uticaja i normativnog delovanja. Polazeći od postulata teorije savezništava (Voltove teorije ravnoteže pretnje i Šnajderove bezbednosne dileme saveza), institucionalnog regionalizma i teorija bezbednosnog svrstavanja u kriznim situacijama (Lejkovog modela hijerarhija u međunarodnim odnosima i Ačarijevih koncepata regionalne bezbednosti i regionalne bezbednosne arhitekture), analizira se kako su forumi namenjeni funkcionalnoj saradnji transformisani u platforme za strateško signaliziranje, anticipativnu koordinaciju i „meko odvracanje“. Zvanična saopštenja i politički govori pokazuju da su regionalni forumi korišćeni za demonstraciju jedinstva, usklađivanje odbrambenih napora i održavanje odvracanja tokom perioda koji je prethodio punoj integraciji u NATO. Partnerstva koja su ranije bila usmerena na tehničku ili ekonomsku saradnju preuzela su drugačiju ulogu, pomažući usklađivanju nordijskih odbrambenih praksi sa savezničkim strukturama i pružajući političku legitimnost bezbednosnoj tranziciji. U tom kontekstu, regionalne institucije delovale su kao most ka formalnom vojnom usklađivanju, podržavajući kolektivnu odbranu pre nego što su ugovorne obaveze stupile na snagu.

*Ključne reči:* proširenje NATO; nordijska saradnja; institucionalna adaptacija; NORDEFCO; član 42(7); teorija savezništva; bezbednosno usklađivanje.

## *Introduction*

On 24 February, 2022, Russian forces began military operations in Ukraine. In May, Sweden and Finland applied for NATO membership. Sweden ended its long-standing neutrality, and Finland abandoned its post-Cold War policy of nonalignment. Finland became NATO's 31st member in April 2023, and Sweden joined in March 2024. Formal accession did not resolve existing challenges related to the integration of national defence planning into NATO's command structures (Friis & Tamnes, 2024). The accession period left both countries outside the scope of Article 5 guarantees. To manage this vulnerability, they relied on regional mechanisms already in place. These included NORDEFCO, the EU's security and defence instruments, NATO-EU coordination forums, and Nordic-Baltic formats. Each was adapted for interim use: signalling alignment, coordinating defence activities, and enhancing deterrence capacity. The EU expressed political support through Article 42(7) TEU, though its legal applicability remained uncertain under Swedish constitutional law (Osterdahl, 2021). NATO-EU mechanisms included Sweden and Finland in consultations related to Ukraine (Stoltenberg, 2022). Nordic-Baltic forums expanded their focus to collective security coordination (Niinistö, 2022).

These frameworks were not designed for defence integration but were subsequently repurposed to support planning, signalling, and reassurance. NORDEFCO shifted from capability coordination to more extensive operational cooperation, including new trilateral military arrangements. The EU's Article 42(7) was activated politically, despite persistent legal ambiguity in Swedish doctrine. NATO-EU mechanisms included the applicants in consultations on Ukraine, while Nordic-Baltic formats adopted a sharper defence focus to project regional cohesion. This case illustrates how institutional alignment can transition from informal cooperation to formal alliance under threat. The article examines how Finland and Sweden used existing regional security institutions to mitigate strategic vulnerability and prepare for NATO integration under conditions of acute external threat.

The analysis focuses on how institutional mechanisms helped reduce strategic vulnerability during the accession period. While previous research has examined Nordic defence cooperation and alignment dynamics, notably through analyses of operational coordination and institutional adaptation, few have systematically examined how regional mechanisms functioned as interim substitutes for alliance guarantees during the NATO accession process (Saxi, 2022; Friis & Tamnes, 2024; Migliorati, 2024). To address this gap, the article draws on insights from alliance theory and institutional regionalism to explain how regional cooperation frameworks were reconfigured in response to external threats.

The analysis assumes that under acute external threat, cooperative frameworks can be reconfigured to serve functions of deterrence, coordination, and legitimacy, even in the absence of binding guarantees. Methodologically, it draws on official statements, policy documents, and defence cooperation records to trace how Finland and Sweden reoriented regional institutions, originally designed for functional cooperation, into instruments of strategic alignment during the NATO accession period. Alliance theory explains the shift through balancing behaviour and alliance dilemmas (Walt, 1987; Snyder, 1990), while institutional regionalism and hierarchy theory explain how established regional forums can be reactivated and repurposed during crises (Acharya, 2009; Lake, 2009). In this context, regional partnerships served as interim substitutes for alliance guarantees and facilitated defence integration without formal obligations. The Nordic case illustrates how dense regional networks can enable flexible, crisis-driven transitions from functional cooperation to a formal alliance.

### *Theoretical and Methodological Framework*

#### Alliance Theory: Balancing Threats and Alliance Dilemmas

Alliance theory links alliance formation to the perception of threat. Walt (1987) defines “threat” as a combination of power, proximity, offensive capability, and intent. Russia meets these criteria. Since 2008, it has expanded its military, invaded Georgia and Ukraine, and articulated revisionist claims against the post-Cold War order. Following the annexation of Crimea in 2014, Sweden and Finland deepened cooperation with NATO but remained formally outside the alliance. The full-scale invasion of Ukraine in 2022 marked a turning point. The cost of staying out exceeded the political cost of joining. Alignment followed. Savolainen (2024) demonstrates that Finland and Sweden reached the same alignment outcome through distinct causal mechanisms, with Finland responding immediately to external threat, while Sweden initially attempted to preserve non-alignment, showing how different perceptions of threat can yield similar alliance behaviour. In both cases, the strategic logic was one of balancing rather than bandwagoning (Forsberg, 2023; Blackburn, 2025). Snyder (1997) conceptualises the alliance dilemma as a tension between abandonment and entrapment. States risk being left without support or being drawn into unwanted conflicts. Sweden and Finland remained nonaligned for decades to avoid entrapment, relying on informal Western partnerships to reduce abandonment risk. This balance collapsed in 2022. As non-members, they lacked binding guarantees against Russian coercion. NATO membership reduced abandonment risk but introduced greater exposure to collective obligations (Friis & Tamnes, 2024). Article 5

addressed the formal security deficit, yet the adjustment was both political and operational. Defence planning had to align with NATO's command architecture. Nordic leaders accepted this constraint, emphasising that membership would strengthen collective defence rather than complicate it (Nordic Defence Ministers, 2023). During accession, both states used EU and NATO channels to mitigate vulnerability. Article 42(7) of the Treaty on European Union was invoked politically to signal solidarity while avoiding escalation (Migliorati, 2024). The strategy reflected caution: there was no shift towards risk-seeking behaviour within the alliance framework.

Formal alliances rest on treaty-based commitments; alignments do not. They may encompass exercises, intelligence sharing, and capability development without legal guarantees. Before 2022, Sweden and Finland already operated at a high level of interoperability with NATO. Their situation does not fit a binary model of alliance versus non-alliance. Wilkins (2012) conceptualises cooperation as a spectrum, while Saxi (2022) shows that Nordic defence arrangements, though informal, created strong expectations of mutual support. Joint training, bilateral agreements, and coordinated planning existed well before formal applications. These practices reduced transaction costs and shortened the path to membership. Empirical studies confirm that Finland and Sweden had developed advanced interoperability through joint exercises and trilateral frameworks with Norway (Møller, 2019; Alberque & Schreer, 2022). When the external threat intensified, transition to membership was swift because the alignment was already functional (Migliorati, 2024). Walt's framework explains this shift as a reaction to threat perception; Snyder interprets it as an adjustment to abandonment risk. Alliance theory accounts for the decision, but not the process. The institutional environment that shaped this process is addressed in the next section.

### Institutional Regionalism and Security Alignment under Crisis

Nordic alignment occurred in a dense institutional context. Institutional regionalism theory treats regional organisations as active in shaping state behaviour, not just as venues (Acharya, 2009). Regions develop norms and frameworks that influence alignment. Acharya (2014) describes them as socially constructed spaces with shared identity. Nordic institutions have long reflected cooperative norms, consensus, mutual assistance, and democratic values, which inform the Nordic Council and NORDEF. The idea of a Nordic political community made joint accession more acceptable (Savolainen, 2024). Security community theory also applies. Deutsch defines it as a group where war is seen as implausible, and Nordic and Baltic states fit this model. Acharya's (2009) work on ASEAN shows that security cooperation can rest on identity, not treaties. Nordic states built defence cooperation without formal commitments. When the crisis hit, the

system held. Existing institutions shifted to military coordination. Nordic solidarity, previously limited to civil issues, extended to security (Nordic Defence Ministers, 2023). NORDEFCO's 2023 statement illustrates this shift. Defence cooperation was presented as central to regional stability. The forum moved from functional cooperation to strategic alignment. Acharya (2014) calls this norm localisation, adapting global norms to local frameworks, in line with his concept of cognitive priors, which explains how pre-existing regional values enable the absorption of new security norms. The collective defence norm was absorbed through existing Nordic political culture before NATO entry.

Lake (1996; 2009) links alignment decisions to hierarchical structures. In a crisis, smaller states accept external leadership to gain protection, trading some autonomy for credible security guarantees. NATO membership placed Finland and Sweden under a US-led command, which was politically costly under normal conditions but necessary in 2022. Before full accession, both states sought to reduce exposure through interim guarantees: security declarations with the United Kingdom and assurances from the United States, reinforced by the political use of EU Article 42(7) (Linde, 2022; UK Prime Minister's Office, 2022; Reuters, 2022; Élysée, 2022). David (1991) defines omnibalancing as managing internal and external threats; before 2022, domestic opposition limited NATO ambitions, but the invasion of Ukraine erased this constraint (SOM Institute, 2024; Forsberg, 2024). The shift was not only strategic but also normative. Forsberg and Christiansson (2025) describe a transformation of identity – neutrality replaced by identification with Western alliances, framed as a return to the Western security community. Ojanen and Väisänen (2023) emphasise empathy with Ukraine and shared values as drivers of this change. Regionalism and alignment theory explain the pathway: institutions provided legitimacy, existing frameworks were repurposed, and shared norms reduced the political cost of transition (Savolainen, 2024). NATO membership was thus presented not as a departure but as a continuation of the existing regional logic of cooperation.

### Methodology

The article covers the period from late 2021 through 2023, focusing on Finland's and Sweden's path from military nonalignment to NATO accession. It is a qualitative study based on the interpretation of official records and political statements concerning regional defence cooperation and alignment. The material consists of publicly issued texts from Nordic, EU, and NATO institutions, such as NORDEFCO statements, the Vision 2030 document, EU strategic planning texts, and NATO-EU declarations, along with bilateral security pledges from France, the UK, and the US, and joint outputs from NB8 and JEF meetings. Documents were examined for

changes in tone and purpose after February 2022, with attention to how institutions discussed defence cooperation, deterrence, and alignment. Patterns in language were identified to trace how existing forums were adapted under pressure.

Between late 2021 and 2023, public speeches and statements by Sauli Niinistö, Magdalena Andersson, Ann Linde, Pål Jonson, and Jens Stoltenberg were analysed to see how they discussed Nordic security, regional cooperation, and the move towards NATO. Their words were considered alongside established discussions on alliance politics and institutional change found in the works of Walt, Snyder, Acharya, Lake, and Forsberg, together with recent analyses of Nordic defence cooperation by Saxi, Friis, Tamnes, and Migliorati, among others. Reading national and multilateral statements next to EU and NATO documents revealed where political language matched formal policy and where it diverged.

### *Empirical Analysis*

#### Nordic Defence Cooperation: From Efficiency to Strategic Unity (NORDEFECO and Nordic-Baltic Forums)

The Nordic Defence Cooperation (NORDEFECO) was formed in 2009 to coordinate military cooperation among Denmark, Finland, Iceland, Norway, and Sweden. In its first phase, the focus was mostly on “smart defence”, i.e., practical and cost-saving cooperation through shared training, exercises, capability development, and some peacekeeping activities (Dahl, 2021). In this early phase, NORDEFECO was often regarded, especially in Denmark, as a pragmatic and financially motivated initiative rather than a strategic one, since Sweden and Finland’s nonalignment placed limits on collective defence planning. The situation began to change after the Russian annexation of Crimea in 2014, which Dahl (2021) describes as a “game changer” that shifted attention to regional security and contingency planning. Still, up to 2022, differences in alliance status, with three Nordic states within NATO and two outside, continued to restrict how far defence integration could go. Instead, it facilitated workarounds, for example, joint exercises with various mixes of participants and some trilateral subgrouping (e.g., Sweden-Finland-Norway on interoperability) (Saxi, 2022). When Russia launched its full invasion of Ukraine in February 2022, the Nordic countries reacted with unprecedented unity. Within NORDEFECO, which Sweden happened to chair in 2022, the agenda immediately shifted to urgent security matters. Just weeks after the invasion, the Nordic defence ministers met (virtually or in person) to coordinate support for Ukraine and discuss the changed security environment. According to the Swedish Ministry of Defence, Sweden’s NORDEFECO chairmanship in 2022 explicitly refocused

cooperation on “adapting to the new defence and security policy situation in Europe” and on “continued support to Ukraine” (Government Offices of Sweden, 2025). This shows that NORDEFECO, originally not designed as a crisis response body, quickly adapted to address a major war in Europe, acting as a forum for policy alignment.

Crucially, as Finland and Sweden inched towards NATO applications (which were publicly hinted at by March and formalised in May 2022), NORDEFECO became a venue for Nordic political signalling of unity. In March 2022, the prime ministers of all five Nordic countries met in Copenhagen and issued a joint statement condemning Russia’s aggression and affirming Nordic solidarity (this was outside NORDEFECO’s military format but reinforced the message). Throughout spring 2022, other Nordic-Baltic forums also rallied: the Nordic-Baltic Eight (NB8), an informal group of the five Nordics plus Estonia, Latvia, and Lithuania, intensified consultations. President Niinistö (2022) indicated that Finland and its neighbours exchanged information almost daily during the early crisis, including about regional security incidents (such as airspace violations or cyber-attacks). By the time Finland and Sweden announced their NATO bids in May, the Nordic and Baltic partners were primed to endorse and protect those bids. One manifestation of this was the Joint Expeditionary Force (JEF), a UK-led coalition of ten Northern European countries (including all Nordics and Baltics). While not a Nordic initiative per se, JEF held a summit in March 2022 (in London) where members, notably the UK, stated that if Finland or Sweden were threatened in the interim, JEF countries would consult and possibly act. This hinted at a multilateral security “safety net” overlapping with NORDEFECO. Indeed, in November 2022, JEF defence ministers met and explicitly stated they had increased military activities in Northern Europe to provide “greater levels of security assurance” to members amid Russia’s aggression (Government Offices of Sweden, 2022). Such exercises and patrols often involved Nordic territories, serving as deterrent signals that Finland and Sweden were not isolated.

Although political statements in 2023 emphasised NORDEFECO’s importance in the context of NATO integration, this shift in purpose had already begun earlier. As Saxi (2022) shows, Sweden, Finland, and Norway initiated trilateral defence coordination during 2020–2021, including the discussion of operational planning for joint crisis scenarios. These efforts did not amount to formal guarantees, but they did mark a significant departure from NORDEFECO’s original scope, moving the framework towards what can reasonably be described as strategic alignment. However, as Friis and Tamnes (2024) observe, NORDEFECO’s long-term strategic function within NATO’s integrated command structure was not yet fully defined as of early 2024, and its future role will depend on whether it evolves into an operational coordination mechanism or retains a more political character. Recent Nordic statements, including the *Vision*



2030 document signed in April 2024, indicate ongoing efforts to align NORDEFECO more closely with NATO's regional defence planning (Nordic Defence Cooperation, 2024; Tarociński, 2024). The Nordic ministers effectively positioned NORDEFECO as a "complementary organisation that strengthens NATO" (Nordic Defence Ministers, 2023). However, as RAND researchers Black, Kleberg, and Silfversten (2024) note, platforms like NORDEFECO now face strategic ambiguity: while essential in the lead-up to accession, their exact role within NATO's command and planning structures remains undefined. Swedish Defence Minister Pål Jonson explicitly said that through long-standing cooperation based on shared values, the Nordics had built trust, and now they were preparing a new vision to deepen defence cooperation – "NORDEFECO is a complementary organisation that strengthens NATO" (Nordic Defence Ministers, 2023). Thus, a forum originally about regional self-help was being hitched to the waggon of the NATO alliance. Concrete plans under this new vision include developing the ability to conduct joint operations among Nordic forces, mutual host-nation support (so troops from one Nordic country can smoothly operate in another), joint logistics, and even integration of civil defence support across borders (Nordic Defence Ministers, 2023). In effect, the Nordics are preparing to operate as a single defence entity within NATO. An illustrative initiative is the plan for a unified Nordic air defence. In March 2023, the air force commanders of Sweden, Finland, Norway, and Denmark signed a declaration of intent to integrate their over 250 combined fighter jets for coordinated air patrols and missions, aimed explicitly at deterring Russia in the Baltic and Arctic regions. This move, unthinkable during the Cold War divisions and not achieved in earlier NORDEFECO days, became feasible and logical once all four countries were NATO-bound or members. It demonstrates the repurposing of a regional partnership (Nordic Air Cooperation) from peacetime training to collective deterrence. Danish defence officials described this initiative as a step towards creating a joint Nordic air operations concept that would enable seamless coordination across national airspaces, effectively treating the Nordic air sector as a unified operational domain designed to complicate any adversary's calculations (Jennings, 2024; Bye, 2025). This growing operational integration was mirrored on the political level.

Nordic-Baltic political forums likewise took on strategic signalling roles. President Niinistö (2022), in his speech, encouraged the NB8 (Nordic-Baltic Eight) to focus "increasingly on security" and to strengthen inter-parliamentary contacts on defence matters. This indicates a push to use even traditionally non-military forums (NB8 has often been about economic and societal cooperation) to build a normative consensus on security. By involving parliaments, the intent was to ensure broad political backing for defence integration and to synchronise threat assessments among Nordics

and Baltics. Notably, the Baltic states (Estonia, Latvia, and Lithuania) were among the loudest advocates for Finnish/Swedish NATO membership, viewing it as bolstering their security in the region. In July 2022, well before accession was complete, the prime ministers of the Nordic and Baltic countries met (at the NB8 level) and issued statements effectively treating Finland and Sweden as part of the allied community, for example, discussing the defence of the Baltic Sea region as a shared responsibility. These acts served as “soft deterrence”: they signalled to Russia that any aggression in the Nordic-Baltic area would meet a unified response, even before NATO’s legal Article 5 applied to Finland or Sweden.

#### The European Union’s CFSP: Mutual Assistance and Strategic Compass

Sweden and Finland’s membership in the European Union (EU) was another crucial regional linkage that they leveraged during their NATO accession journey. Both countries joined the EU in 1995, and since then the EU’s Common Foreign and Security Policy (CFSP), including the Common Security and Defence Policy (CSDP), has been a key pillar of their security orientation. While the EU is not a defence alliance, it embodies a political and normative community. In the context of 2022–2023, the EU provided diplomatic support, coordinated sanctions and aid, and even a form of security guarantees to Finland and Sweden, thereby acting as a “force multiplier” for their alignment with NATO. Immediately after Russia’s invasion of Ukraine, the EU moved with surprising speed and cohesion to impose massive sanctions on Russia and to assist Ukraine. Sweden and Finland were at the forefront of this effort, aligning completely with EU positions. Ann Linde (2022), Swedish Foreign Minister, emphasised that the EU’s unprecedentedly swift adoption of sanctions (six packages by mid-2022) and unity in condemning Russia had proven the value of European cohesion. As noted by Brommesson, Ekengren, and Michalski (2022), Linde stated in her June 2022 foreign policy address that Sweden had aligned with EU institutions and other member states in shaping a common response to Russia, demonstrating unity within the European Union. This diplomatic unity was important for Sweden/Finland’s NATO aspirations in two ways. First, it signalled to Moscow that Europe as a whole, not just NATO, stood against its aggression; thus, any retaliation against the two applicants would anger all EU members. Second, it built confidence among NATO allies, especially those in the EU, that Sweden and Finland were deeply committed to Western collective action. In effect, Stockholm and Helsinki demonstrated that they were already *de facto* part of the “Western security community” through the EU, making their NATO candidacy more credible.

A critical instrument of soft deterrence for Finland and Sweden during the vulnerable application phase was Article 42(7) of the Treaty on

European Union. This clause, introduced by the Lisbon Treaty, states that if an EU member is the victim of armed aggression, other members have an obligation of aid and assistance by all means in their power. It is often likened to a mutual defence commitment, though with important caveats (it does not prejudice specific national policies like neutrality, and NATO remains the cornerstone for allies). Importantly, Finland and Sweden explicitly invoked Article 42(7) as a reassurance. In March 2022, as the debate on NATO was raging domestically, Finnish and Swedish officials sent a letter to EU member states reminding them of the 42(7) commitment (Urciuolo, 2022). In Sweden's Parliamentary Security Policy report (May 2022), Article 42(7) was discussed as a potential alternative or complement to NATO membership, though it concluded that relying on it alone was insufficient (Brommesson, Ekengren & Michalski, 2022). European partners reacted quickly. France took the lead. On 16 May 2022, the day Finland and Sweden announced their intention to apply for NATO membership, President Emmanuel Macron welcomed the decision and referred to Article 42(7) of the Treaty on European Union as a basis for European solidarity (Élysée, 2022). The statement noted that any attempt to threaten the sovereignty of Finland or Sweden would face a response from France and confirmed readiness to strengthen cooperation through consultations and defence activities. This was not a formal security guarantee but a political assurance of support during the accession period. Other EU states voiced similar support. For instance, Belgium's Foreign Minister stated that by virtue of 42(7), the EU members are committed to defending and assisting each other by all means if Finland or Sweden were attacked during the interim (Belgian Ministry of Foreign Affairs, 2022). Germany, the Netherlands, Spain, Poland, Italy, and others likewise indicated they would not "stand by" if the Nordics were under threat.

The EU's institutional framework thus provided an immediate legal-political backstop once the NATO applications were submitted. Finnish President Niinistö and Swedish Prime Minister Andersson cited these EU commitments when addressing public concerns about the gap before NATO ratification, stressing that Sweden and Finland were "not alone" and pointing to the mutual aid clause and the bilateral pledges from the UK and the United States (UK Prime Minister's Office, 2022; Élysée, 2022; Reuters, 2022). This reassurance was framed in terms of intra-EU solidarity and bilateral security logic. In effect, Article 42(7) functioned as a form of political deterrence: although not tested in practice, its invocation by major EU states signalled that any attack on these countries would prompt a collective European response. As the Clingendael Institute (2022) notes, the clause is most relevant for EU members outside NATO but geographically exposed to Russia, such as Finland and Sweden before their accession, and serves as a last-resort framework for political and military assistance. In parallel, the EU itself was bolstering its role as a security actor

through the adoption of the Strategic Compass in March 2022 (an EU policy guiding CSDP for the next 5-10 years). The war injected urgency and ambition into this document. Sweden and Finland, traditionally strong supporters of the EU's defence initiatives (as long as they complement NATO, not compete with it), helped shape a Compass that calls for stronger EU-NATO cooperation and for improving Europe's ability to act. The Compass even contemplates scenarios to use the EU's rapid deployment forces. As Migliorati (2024) argues, Sweden and Finland gradually reframed their EU engagement as strategically complementary to NATO membership. In both cases, the EU's Common Security and Defence Policy was not viewed as sufficient for hard security but remained politically useful in communicating commitment to European cooperation. Rather than abandoning their non-aligned traditions abruptly, Sweden and Finland used their record of EU engagement to support a gradual political and institutional transition during the crisis, without provoking domestic backlash. This view, that EU defence instruments can have practical significance, has since gained broader political visibility. While Finland emphasised Article 42(7), Sweden took a more institutional route. Sweden held the Council of the EU presidency from January to June 2023. During that time, it hosted defence-focused meetings. One of them included a speech by Defence Minister Pål Jonson on military support to Ukraine and EU-NATO cooperation (Government Offices of Sweden, 2025). That Sweden chose these themes indicates that it used the EU presidency to further connect NATO and EU efforts, aligning with its imminent ally status. Moreover, both countries were deeply involved in EU defence projects such as PESCO (Permanent Structured Cooperation) projects on military mobility and joint procurement. Finland and Sweden have been active participants in the EU's PESCO Military Mobility initiative since late 2022, following the Council's revision of the Action Plan on Military Mobility. The initiative has since evolved into the comprehensive Military Mobility Package 2025, proposed by the European Commission and the High Representative, representing the EU's most ambitious step towards creating a "Military Schengen" for the rapid movement of troops and equipment across Europe (European Commission, 2025). In November 2022, the Nordic states signed an EU PESCO project (with others) on military mobility to ease the movement of troops across Europe (Government Offices of Sweden, 2025). Military mobility has a clear NATO benefit – moving reinforcements in a crisis. Thus, by championing it in the EU, Finland and Sweden indirectly boosted NATO's readiness, again blurring the line between EU cooperation and alliance preparation. Another example is that Finland and Sweden joined the German-led European Sky Shield Initiative in late 2022 to jointly acquire air defence systems with 15 other European countries (Elgin & Lanoszka, 2023). This was done within a NATO context but overlapped

with EU initiatives on capability development. It underscores how they positioned themselves as contributors to collective defence even before formally joining NATO by leveraging EU mechanisms for capability investment that NATO also needs.

At the narrative level, Sweden and Finland consistently framed their NATO move as being consistent with EU membership, emphasising Western values and unity. “Our security policy remains firmly in place” and “builds on cohesion in the EU and increased cooperation... in the Nordic region, in the EU, and the transatlantic link”, declared Sweden’s government in early 2022 (notwithstanding the shift on NATO, they portrayed it as a complement to EU solidarity, not a change of orientation). They also reassured EU neutrals (Ireland and Austria) that Nordic NATO membership would not undermine the EU’s independent voice or their commitments to the EU’s security efforts (Linde, 2022). The EU context also played a role in dealing with the delays caused by Turkey and Hungary in approving Sweden’s NATO membership. EU diplomacy was at work in the background. Nordic and Baltic members spoke with Hungary through informal Union channels, urging it not to stall Sweden’s bid. Although there is little official record of this, the overlap between the EU and NATO helped Sweden and Finland use their EU membership to keep the process moving. Hungary, which belongs to both groups, was pressed by European and transatlantic partners not to break EU unity or disrupt NATO cohesion (Than, 2024a; Than & Pollard, 2024b).

### NATO-EU Coordination and the Interlocking Platforms of Alignment

During the accession period, Sweden and Finland occupied a unique position: they were members of the European Union (fully inside one major security institution) and enhanced partners of NATO (closely associated, but not members). This intersection allowed them to serve as a natural bridge between NATO and EU efforts, and they capitalised on this to ensure they were as integrated as possible into Western security deliberations. The Ukraine war itself prompted an unprecedented level of NATO-EU coordination, which in turn benefited Finland and Sweden’s cause by keeping them closely in the loop. Within days of Russia’s invasion, NATO made an extraordinary move to include Finland and Sweden in its inner-circle discussions about the war. On 4 March, 2022, NATO Secretary General Jens Stoltenberg announced that “in response to Russia’s aggression, we have decided to strengthen our coordination and information-sharing with Finland and Sweden. Both countries are now taking part in most NATO consultations about the crisis” (Stoltenberg, 2022). In practice, this meant Finnish and Swedish representatives were present in NATO meetings regarding the Ukraine conflict and related defence posture updates. This level of inclusion is far beyond normal

partnership; even other close partners do not sit in all such sessions. It reflected the fact that these two were on a fast track to membership and that their input was valued. From a strategic viewpoint, it also bolstered deterrence: Russia could no longer count on Finland and Sweden being “out of the room” in NATO councils. As Defence News reported, Finland and Sweden were considered a “tier of their own” among NATO’s Enhanced Opportunity Partners due to the sophistication of their militaries and their geographic importance bridging NATO’s Nordic and Baltic members (Stoltenberg, 2022). NATO treated them accordingly, effectively as allies in all but name.

This arrangement served both NATO and the Nordic states. For NATO, it ensured seamless planning: any NATO defensive moves in the Baltic Sea or Arctic could be coordinated with Finland and Sweden, avoiding gaps. For the two states, it meant receiving real-time intelligence and plans from NATO, improving their readiness. It also gave them a voice to shape NATO responses that would affect their security (for example, decisions on force posture in the Baltics). Importantly, it signalled to their own publics and militaries that joining NATO would not be a shock but rather a continuation of what was already happening. Indeed, by the time Finland formally joined in April 2023, its personnel had been sitting in NATO’s Military Committee as observers for months, and Finnish F-18 fighters were routinely drilling with NATO air forces. This heavy integration before accession is a case of anticipatory coordination - aligning practices and policies in advance so that formal membership would be a smooth bureaucratic step. The war revitalised NATO-EU cooperation at top levels. In January 2023, for the first time in several years, NATO and EU leadership signed a Joint Declaration on Cooperation. One impetus was clearly the changed security landscape in Europe and the fact that, as the declaration noted, with Finland and Sweden in NATO, 96% of EU citizens would be protected by NATO. The draft of that declaration was delayed in 2022 (reportedly due to Turkey-Cyprus issues), but it was finally linked when it became clear Finland and Sweden’s accession was close. That text and accompanying statements emphasised unity in facing Russian aggression and the need to coordinate on issues like resilience, cyber, and infrastructure protection, which were areas where NATO and EU roles intersect (Monaghan, Wall, Svendsen, & Martinez, 2023). The subtext was that Europe’s security architecture now truly overlaps: NATO is no longer partly out of sync with EU membership (previously 21 of 27 EU members were NATO allies; now it is 23 of 27, leaving only Ireland, Austria, Malta, and Cyprus as neutrals). Finnish and Swedish officials have long advocated resolving the long-standing Turkey-Cyprus impasse that has hindered formal NATO-EU cooperation, and their accession arguably helped shift the momentum towards greater pragmatism (Howorth, 2017). During 2022–2023, Finland and Sweden participated in several practical

NATO-EU coordination platforms where their involvement was increasingly visible. One notable example was the European Centre of Excellence for Countering Hybrid Threats in Helsinki, a joint NATO-EU-affiliated hub that became central to analysing Russia's hybrid tactics, including cyber operations and disinformation. Hosting this centre placed Finland at the forefront of NATO-EU cooperation on hybrid defence and allowed both Nordic states to demonstrate their added value to transatlantic security. Another important domain of cooperation was military mobility as a technical but crucial field in which the EU, through its funding and regulatory mechanisms, and NATO, through reinforcement planning, worked in parallel. The Netherlands-led PESCO project on Military Mobility, joined by the United States, Canada, and Norway and by 2023 open to Finland and Sweden, effectively bridged EU and NATO defence planning. Finland and Sweden's advocacy ensured that the specific needs of Northern Europe, such as the rapid movement of forces to the High North, were prioritised (Government Offices of Sweden, 2025). NATO and the EU's joint progress report from June 2022 also highlighted improvements in military mobility that directly benefited Nordic defence (Council of the European Union, 2022). Finally, information-sharing mechanisms deepened integration even before formal accession. As Ojanen and Väisänen (2023) observe, the early synchronisation of Sweden and Finland with NATO's political rhythm developed through joint planning and regional consultation forums, reinforcing operational alignment within both NATO and EU frameworks.

Although NATO and the EU do not conduct joint military operations, they coordinate in theatres like the Baltic Sea. Finland and Sweden, even pre-accession, participated in NATO exercises (BALTOPS, Arctic Challenge, etc.) while simultaneously shaping EU exercises (like Crisis Management exercises under the CSDP). In 2022, as a sign of unity, NATO invited the EU to observe or participate in certain military exercises and vice versa. The presence of Finnish and Swedish officers in both NATO and EU drills ensured consistency. For example, in BALTOPS 22 (a major NATO-led naval exercise in the Baltic in June 2022), Swedish and Finnish forces participated fully, and the exercise showcased allied and EU cooperation through high-level visits and coordination events (NATO, 2022). Conversely, when the EU held exercises for its Battlegroup or tested its response to hybrid scenarios, NATO liaison teams included Finns/Swedes, ensuring NATO considerations were known. Finland and Sweden also used their dual status to navigate diplomatic hurdles. A clear case was dealing with Turkey's objections to Swedish NATO membership over issues like Kurdish groups. While primarily handled bilaterally and within NATO (the Madrid trilateral memorandum of June 2022 between Turkey, Finland and Sweden), the EU context remained in the background. Both Nordic states implied that security cooperation with

Turkey in other forums (like in the EU or within the anti-ISIS coalition) would benefit from resolving the NATO issue. Moreover, the European Parliament and many EU voices openly supported Sweden, putting indirect pressure on Turkey by suggesting its obstruction risked its EU relations. This is more an intangible effect, but it shows how being part of the EU gave Sweden another platform of support that purely NATO aspirants (like Ukraine or Georgia) lack. Finally, one should note how Nordic accession itself has altered NATO-EU relations: nearly the entire EU is under NATO's umbrella, fulfilling a long-standing aim of Euro-Atlantic integration. President Niinistö and others highlighted that with Finland and Sweden in NATO, there will be "no empty Nordic chairs" in NATO councils, reflecting the completion of regional security alignment. Almost all EU nations are now allies, a development expected to reduce duplication and friction while making platforms like NATO-EU task forces on cyber, terrorism, and infrastructure protection more effective. Sweden's EU presidency in early 2023 also prioritised closer NATO-EU coordination through a joint playbook on resilience and infrastructure after the Nord Stream pipeline sabotage, an issue that highlighted the growing overlap between the two organisations in protecting critical infrastructure and countering hybrid threats (Niinistö, 2022; NATO, 2023).

### *Discussion*

The empirical evidence from the Nordic NATO accession process reveals a dynamic interplay between alliances and regional partnerships, confirming and extending insights from the theoretical framework. This section identifies three overarching themes: (1) regional frameworks as enablers of alliance formation, (2) the evolution of partnerships from functional to strategic roles, and (3) the implications for alliance theory under crisis conditions.

#### Regional frameworks as enablers of alliance formation

Sweden and Finland's experience demonstrates that pre-existing regional institutions can significantly smooth the path into a formal alliance. Alliance theory traditionally treats the decision to ally as a function of threat and interest calculations but often brackets off the role of institutions unless they are themselves alliances. In this case, NORDEF, the EU, and Nordic-Baltic forums, none of which are defence alliances per se, acted as a proving ground and safety net for NATO membership. By the time the decisive threat (Russia's 2022 invasion) emerged, Finland and Sweden had already incrementally built interoperability and political alignment with NATO through these frameworks (Stoltenberg, 2022). That reflects the development of an "alignment habit", a concept describing how repeated



defence cooperation can evolve into stable alignment practices (Wilkins, 2012). This habit reduced the uncertainty and fear of abandonment that can accompany a leap into alliance, as confidence in support had been reinforced by prior cooperation. Quick security guarantees from EU countries and the UK rested on decades of solidarity cultivated in the EU and Nordic frameworks.

These patterns support institutionalist arguments that institutions build trust and communication channels that can be vital in crises. Acharya (2014) argues that regional cooperation can circumvent restrictions, such as Sweden's former nonalignment, and still integrate states in meaningful ways. Dahl (2021) provides an empirical example of this logic, showing how NORDEFECO helped the Nordic states align despite differing defence doctrines. Alliance theory often debates the problem of credible commitment, i.e., how states can ensure that allies will deliver support when needed. Formal treaties are one mechanism to enhance credibility because they increase reputational and political costs for defection (Morrow, 2000). Another is embedding alliance aspirants in multilateral institutions that create political expectations of support. By the time Finland and Sweden formally applied to join NATO, nearly all NATO members were already politically committed to their defence through the EU or bilateral ties. RAND (2024) confirms that both countries were already embedded in NATO-compatible frameworks such as the JEF and NORDEFECO, which allowed for a smooth transition into full membership, though command alignment issues remain, especially in Finland's preference for JFC Norfolk over Brunssum. This institutional background made the NATO commitment less controversial and more credible. Accession talks concluded in record time; protocols were signed just weeks after application. No other post-Cold War entrant moved so quickly. This speed is attributable in part to the depth of regional integration. In effect, NATO membership formalised an alignment already largely in place. This reinforces Wilkins' argument that alignment today takes multiple forms beyond traditional alliances (Wilkins, 2012). Finland and Sweden aligned through regional institutions first, then allied formally; the two paths were not contradictory but sequentially reinforcing.

### Functional to strategic: the repurposing of partnerships

The functionalist origins of several partnerships shifted under pressure, turning into instruments for strategic signalling and coordination. NORDEFECO began as a cost-sharing arrangement ("smart defence") but by 2023 facilitated combined Nordic air deterrence postures aimed at Russia. The EU's Common Foreign and Security Policy (CFSP), originally a diplomatic and soft power tool, became a channel for security guarantees via Article 42(7) (Élysée, 2022). This transformation fits a broader historical

pattern; institutions built for one function often evolve when conditions require them. A similar shift followed Russia's 2014 annexation of Crimea and conflict in Donbas, which moved NORDEFCO towards more operational cooperation (Dahl, 2021). The events of 2022 accelerated this shift. Instead of building new bodies, leaders turned to existing ones. This approach was not only efficient but also carried institutional legitimacy. Messages sent through the Nordic Council or the EU carried symbolic weight by virtue of the broader communities they represent. When President Niinistö (2022) addressed the Nordic Council, his remark that the Nordic countries were "strong security providers" and that there would be "no more empty chairs" carried additional weight because it was delivered within the very institution that embodied that unity.

This process had limits. Institutions could not transform into something entirely different overnight; the EU did not become a military alliance. Friis and Tamnes (2024) note that despite rapid accession to NATO, procedural and doctrinal mismatches within Nordic regional defence remain unresolved. However, these frameworks demonstrated considerable flexibility. The EU moved beyond its prior constraints by funding military support to Ukraine via the European Peace Facility, with backing from Sweden and Finland. It also engaged in cyber coordination through CERT-EU alongside NATO. Nordic cooperation also shifted from general policy alignment to elements of an integrated command. The Nordic Air Command initiative reflects this development (Moyer & Winberg, 2024). Soft deterrence emerged as a core function: coordinated messaging, joint statements, and exercises signalled collective resolve without requiring formal treaty guarantees. This can increase the political cost of aggression for potential adversaries, even if legal obligations are not explicit. As reflected in Linde's (2022) statement, Western coordination and unified action signalled collective resolve and helped counter the effect of Russia's early threats towards Finland and Sweden. No overt hostile actions followed, aside from minor airspace incursions and disinformation. Integrated messaging by the Nordics, the EU, and NATO likely shaped Moscow's expectations of a joint reaction. Anticipatory coordination also became visible. Before joining NATO, Finland and Sweden signed onto NATO's European Sky Shield air defence project and negotiated bilateral defence agreements with the United States (Elgin & Lanoszka, 2023). Ojanen and Väisänen (2023) describe this as pragmatic regional coordination, particularly evident in Arctic defence planning. These moves signalled readiness, despite the absence of formal command integration. They also demonstrated to external and domestic audiences that the two states would be dependable NATO allies. Alliances serve multiple purposes, with some designed for war-fighting and others for signalling. Snyder (1991) has emphasised that alliances convey deterrent and compelling messages alike. Regional partnerships here functioned in that

communicative role: Nordic statements conveyed resolve to Moscow, EU rhetoric reassured domestic publics, and joint NATO-EU actions projected cohesion internationally (Monaghan, Wall, Svendsen, & Martinez, 2023).

### Implications for alliance theory under crisis

The Nordic case provides a contemporary example of Walt's (1987) balance-of-threat logic, though filtered through domestic identity and institutional mediation. The threshold for action was high. Formal alignment occurred only when the perceived threat became overwhelming and existing forms of informal security cooperation were perceived as insufficient. Walt's framework explains the eventual NATO decision, but not the delay. Domestic politics and national identity contributed to this hesitation, particularly in Sweden, where a tradition of neutrality and public ambivalence towards military alliances constrained early political moves towards NATO membership (Forsberg, 2023; Savolainen, 2024). Finland, by contrast, reacted more quickly to the same threat, viewing nonalignment as increasingly untenable once Russia's full-scale invasion had begun. As both authors note, the availability of alternative alignments, through the EU, NORDEFCO, and bilateral assurances, created a sense of security that postponed the formal step into NATO. Only when these frameworks were perceived as inadequate against a maximal threat did formal alliance become necessary. This supports the idea that states often prefer lighter forms of alignment until a crisis escalates. The transition reflects Lake's view that states avoid hierarchical commitments until the security trade-off justifies the loss of autonomy. When that moment came, Finland and Sweden accepted NATO's structure, subordinating parts of their defence planning to US-led command arrangements in exchange for credible protection. Lake would interpret that as a shift up the security hierarchy, which was rational but reluctant, from loose alignment to formal integration under pressure. Snyder's alliance dilemma (1991, 1997) also applies in this case. Prior to 2022, there was concern, especially in Sweden, about the entrapment that NATO membership might bring, namely involvement in great power conflicts. Nonalignment offered a buffer. After Russia's full invasion of Ukraine, the fear of abandonment when facing aggression alone or with only EU support overrode concerns about entrapment. NATO's posture in 2022, oriented strictly towards defence, likely reassured Nordic leaders. Snyder (1997) has argued that flexible or ambiguous obligations can help manage the trade-off between abandonment and entrapment. Finland and Sweden operated in that space, first relying on informal ambiguity in the absence of a treaty and without entrapment, but with partial reassurance, while moving towards formal clarity later, with binding commitments that reduced abandonment

risk and maintained only limited exposure to entrapment given NATO's defensive character.

From a broader international relations perspective, the Nordic experience reinforces the role of regions in global alignment processes. Nordic and EU institutions functioned as a regional security complex in Buzan's (2003) terms: a set of states with interlinked security concerns. By aligning with NATO, the entire complex pivoted. The case is reminiscent of Cold War Western Europe, where states aligned through both NATO and European communities. What stands out here is the normative framing. Identity and values featured heavily in political rhetoric. Few prior NATO enlargements emphasised liberal democracy and rule of law as explicitly as Finland and Sweden did, framing their accession as rejoining the West (Élysée, 2022). This aligns with a constructivist reading of alliance formation, particularly Wendt's (1999) argument that states act in line with shared identity and social belonging. The case also informs thinking about alliance credibility and crisis response. NATO's willingness to integrate partners during a crisis and the EU's readiness to provide solidarity establish a precedent. Similar approaches may occur. If another non-member European state were to move towards NATO under threat, existing regional institutions would likely be leveraged to ease the transition. The Nordic case illustrates the function of "alignment scaffolding", framed in intermediate institutional structures that support states on the path to formal alliance. Alliance formation does not occur in a vacuum. It is shaped by institutions, identity, and regional context. The Nordic example affirms core expectations of alliance theory: that severe threats push states towards alliances (Walt, 1987), but also reveals the mediating role of norms, regional cooperation, and domestic politics. Strategic repurposing of regional partnerships allowed Sweden and Finland to manage risk while securing alignment.

### *Conclusions*

The Nordic enlargement of NATO in 2022–2023, which brought Finland and Sweden into the Alliance, marked a significant shift in Northern Europe's security environment. The process showed how both states relied on existing regional arrangements to manage accession, using NORDEFECO, the EU's defence mechanisms, NATO-EU coordination, and Nordic-Baltic forums to bridge the gap between partnership and alliance. These frameworks provided coordination, reassurance, and visibility, allowing both countries to function as *de facto* allies before formal membership. The case confirms that regional institutions can serve as effective interim structures for security cooperation under crises. Regional partnerships acted as a bridge to NATO. NORDEFECO enabled operational planning and coordination, while the EU's Article 42(7) and bilateral

guarantees from the UK and France signalled deterrence and political solidarity. Joint initiatives within the Nordic-Baltic formats and the Joint Expeditionary Force increased readiness and interoperability. Together, these mechanisms helped stabilise the security environment and prevented miscalculation during the accession period. Functional cooperation platforms evolved into strategic instruments. NORDEFCO shifted from a cost-saving framework to a defence coordination platform linked to NATO's regional plans. The EU moved beyond its political mandate to serve as a backstop for deterrence. This adaptation illustrates the flexibility of institutional regionalism and the ability of small states to use existing frameworks to advance security goals. Regional cooperation complemented the formal alliance system rather than competing with it. Unified messaging and soft deterrence were central to the Nordic approach. Coordinated statements, symbolic actions, and joint exercises projected cohesion and signalled collective resolve. This form of deterrence worked without invoking hard military power, reducing uncertainty about the Nordics' commitment to mutual defence. It underscored the importance of political unity as a strategic tool in times of transition.

Finland and Sweden's alignment followed classic alliance logic. A direct external threat prompted balancing behaviour, but long-term institutional cooperation and shared democratic identity made the transition faster and more legitimate. Public opinion and elite discourse converged on the view that membership was a natural extension of existing cooperation. The Nordic case refines alliance theory by showing how previous institutional links and shared norms reduce the costs of realignment. The findings extend alliance theory by demonstrating how institutional regionalism can provide functional substitutes for formal guarantees, linking balancing behaviour with institutional adaptation under threat.

For Europe, NATO's Nordic enlargement strengthened deterrence and collective defence in the Baltic and Arctic regions. The integration of Nordic capabilities and the alignment of regional institutions with NATO planning have made Northern Europe more coherent and resilient. The case also highlights the growing interdependence between NATO and the EU, whose instruments now operate in complementary roles. The Nordic experience demonstrates that regional institutions, when flexible and embedded in trust, can sustain security even before formal treaty guarantees take effect. These insights may inform further research on alliance formation and regional security governance, showing how existing institutions can sustain stability in periods of strategic uncertainty. The Nordic experience thus illustrates how regional cooperation can evolve into a lasting pillar of collective defence when shaped by shared norms and external pressure.

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