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Development and resource needs of national defence in the 2030s

Parliamentary working group on defence

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Development and resource needs of national defence in the 2030s

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Development and resource needs of national defence in the 2030s

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Abstract

The Government appointed a parliamentary working group on defence on 27 November 2025. The purpose of the work has been to provide Parliament actively and comprehensively with information on the need to develop and resource Finland's homeland defence. All parties of the Parliament were represented in the working group. The task was to share information on defence-related developments, not to formulate a common position on defence.

The operating environment for Finland's and NATO's defence is unstable, and Russia presents a long-term and unpredictable threat. The development of warfare is constant. The pace of technological change and its effects create new threats but also new opportunities.

Finland's defence will be developed systematically as a whole and from a long-term perspective, in accordance with the 2024 Government Defence Report. While the foundation of Finland's military capability is sound, a maintenance backlog has accumulated over the years and should be addressed as soon as possible.

Planning of the defence administration's activities and resources is increasingly dependent on funding levels agreed across electoral terms. The estimated defence expenditure needs for sustaining and developing defence capabilities clearly exceed the NATO's target of 3.5% of GDP annually, reflecting the real requirements of the current operating environment over the next decade. Deterrence and preparedness are invariably preferable to a crisis both in economic terms and from a human perspective.

Keywords inter-parliamentary, deterrence, homeland defence, resourcing, defence expenditure, parliamentary control

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1 Introduction

A fundamental purpose of sustaining and developing defence capability is to avoid a military crisis and to preserve peace. Military deterrence and capability development always entail preparing for the use of military force. Preparedness is invariably preferable to a crisis in economic terms and especially from a human perspective.

The 2024 Government Defence Report concludes that “sufficient long-term resourcing is the most critical factor for ensuring Finland’s defence capability”. Accordingly, the Government appointed a parliamentary working group on defence for the period from 27 November 2025 to 30 June 2026.

The purpose of the work has been to provide Parliament actively and comprehensively with information on the need to develop and resource Finland’s homeland defence in the 2030s. The aim was to strengthen the ability of parliamentary parties to commit to defence policy guidelines across electoral terms. The task was to share information on defence-related developments, not to formulate a common position on defence.

The Finnish defence administration provided the group with information on matters concerning the operating environment and the long-term development needs of defence as well as related resource requirements. This report reflects the information the group received. It does not take any stand on matters concerning the responsibilities of other branches of government in relation to total defence or on the prioritising of central government finances in relation to other spending needs of across government.

The parliamentary working group on defence was chaired by Jukka Kopra (National Coalition Party). All parliamentary parties were represented in the group.

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Member Heikki Autto
Deputy member Timo Heinonen

The Finns Party

Vice Chairperson Jari Ronkainen
Member Jenna Simula
Deputy Member Miko Bergbom

Social Democratic Party

Vice Chairperson Mika Kari
Member Tytti Tuppurainen
Deputy Member Joonas Räsänen

Centre Party

Member Mikko Savola
Member Hanna Räsänen
Deputy Member Mikko Polvinen

The Greens

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Left Alliance

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2 Operating environment

The operating environment for Finland's and NATO's defence is unstable, and Russia presents a long-term and unpredictable threat. Finland and the Alliance must prepare for a possible use or threat of military force against them. Although no immediate military threat is currently in sight, the security situation may change rapidly. Russia has become more aggressive in its hybrid influence activities in Europe, adjusting their intensity according to available resources, observed effects and Western countermeasures. The prevailing security landscape accentuates the importance of societal resilience.

History and contemporary developments demonstrate that war is a permanent element of Russia's toolkit. Russia prioritises power politics and military policy in the pursuit of its goals and is prepared to take significant risks with little regard for losses. It continues to pursue a sphere of influence in Europe in line with its demands for "security guarantees". Despite peace talks, there are no indications that Russia is genuinely interested in ending its war of aggression against Ukraine. Russia believes it can prevail in a war of attrition and reckons that war fatigue in the West will help it win the war.

Russia is currently focusing its attention and military resources on Ukraine. The outcome of the war in Ukraine will shape the development of the security environment. Regardless of the outcome, Russia will pose a significantly greater military threat to the West than before.

The accession of Finland and Sweden to NATO has reshaped the military-strategic landscape in Northern Europe. Russia has announced that it will respond to Finland's and Sweden's accession with military-technical retaliatory measures. The military threat posed by Russia to Finland will very likely increase once the war in Ukraine ends or as the intensity of the conflict otherwise decreases. Russia's military power will grow significantly in Finland's neighbouring areas and is likely to increase to approximately three times its current level, to around 80,000 troops, should its plans to strengthen and modernise its western strategic direction materialise. In addition, Russia can flexibly concentrate troops within its territory. Russia's deterrence ultimately rests on nuclear weapons, both now and in the future. It is making increasingly unscrupulous use of nuclear deterrence in its

strategic communications. Russia seeks to continue its cooperation (for example in defence industry, energy, technology and research) with China to sustain its military operations in Ukraine and to ensure the long-term rearmament of its armed forces. China, in turn, facilitates Russia's war of aggression and seeks to increase its global influence by creating economic, political and technological dependencies. The relationship between China and Russia has become increasingly asymmetric, with China clearly the stronger of the two.

The security of the Arctic is inseparably linked to European security and to the unity of the transatlantic region, both in terms of natural resources and military use. The region hosts strategically significant Russian military capabilities, including strategic nuclear submarines. The opening of the Northeast Passage as a sea route for transport and trade will intensify competition and increase tensions in the Arctic. The planning of military activities is complicated by long distances and underdeveloped infrastructure in remote areas. In addition, activities in the Arctic link into environmental considerations and the rights and livelihoods of indigenous peoples.

Figure 1. Working group familiarised itself with air and land defence in Lapland in March 2026.



The warfare is evolving. It is reflected in the continuous broad-spectrum threat posed by Russia, the harnessing of new technologies and the return of protracted attrition warfare to Europe. Various conflicts demonstrate that warfare often targets civilians, infrastructure and vital functions of society on a broad scale, with little regard for international law.

The pace of technological change and its effects create new threats but also new opportunities, particularly in the use of advanced technologies. Dual-use and military technologies complement each other. Battlefield transparency has made it more difficult for troops to operate covertly. Unmanned systems (UxS) have become established both on the battlefield and in long-range precision fires. Autonomous weapons systems and the military use of artificial intelligence (AI) are currently developing outside international control or generally accepted frameworks. Key disruptive technologies for warfare include data processing, digitalisation, information networks, spectrum management, AI, machine autonomy, space technologies and quantum technologies. Greater technological and industrial capacity also enables the use of cheaper and more rapidly deployable capabilities. The role of private technology companies is increasingly prominent in disruptive technologies, and, in practice, strategic capabilities may be controlled by individual companies.

The war in Ukraine has demonstrated that Europe has significant shortfalls in defence materiel and in forces required for large-scale warfare. Increased demand has weakened the availability of defence materiel and raw materials critical for the defence industry. Delivery times have lengthened, and prices have risen. Prior to 2022, EU Member States sourced approximately 60% of their defence materiel from suppliers outside the EU, particularly from the United States. In 2024–2025, European NATO members sourced around 53% of their procurements from European suppliers, 36% from US suppliers and 11% from other non-European suppliers. Europe must strengthen its defence technological and industrial base and rapidly scale up defence industrial production to reduce dependencies on non-European suppliers. This will enhance Europe's military security of supply and strategic autonomy.

International cooperation in the development of defence capabilities has deepened rapidly. Materiel cooperation across various forums and multinational joint projects is central to the development of European capabilities. As the international division of labour is changing, Finland has an opportunity to position itself as a leading defence industry nation by leveraging its high level of technological and specialised expertise, as well as the quality and cost-effectiveness of its production.

The national security and defence strategies of the current United States administration place the primary US focus on homeland security and the Western hemisphere. The military focus is shifting towards the Indo-Pacific region, where China is seen as the primary challenge. Russia is regarded as a long-term but manageable threat, primarily to NATO's eastern member states. The US administration nevertheless recognises that Russia can also pose a threat to the United States, for example through its nuclear weapons and cyber capabilities. The United States provides Europe with critical capabilities that are scarce in Europe. If a conflict in Europe were to coincide with a conflict in Asia, the United States would focus its capabilities on Asia. The United States seeks defence cooperation with countries that meet NATO's common defence spending targets and invest in the development of their defence capabilities. The United States remains committed to NATO's collective defence and nuclear deterrence.¹

The United States is a key ally for European security. It is justifiably demanding that European Allies assume primary responsibility for the conventional defence of their continent. The message is not new, but it takes on weight in the current security environment. The change is expected to be permanent and not dependent on individual administrations. The transfer of responsibility within NATO is likely to proceed at the pace at which Europe is able to replace the conventional capabilities currently provided by the United States. However, it is also necessary to prepare for the possibility that the transfer may happen sooner than anticipated. The political changes in the United States have placed allies and partners in a new situation. The transatlantic environment is now marked by unpredictability, rapid change and increasingly harsh rhetoric. US military operations in Venezuela and Iran demonstrate that the United States is prepared to use military force without consulting its allies. This reflects a broader global trend in which the rules-based international order is eroding, and the status of the United Nations is diminishing.

Defence cooperation between Finland and the United States is conducted on a long-term basis and is grounded in the interests of both parties. At the practical level, cooperation is close in terms of defence policy, the military, the defence industry and defence materiel. The implementation of the Defence Cooperation Agreement (DCA) between Finland and the United States is progressing as planned.

1 A statement by United States at a meeting of NATO defence ministers on 12 February 2026. <https://www.war.gov/News/Speeches/Speech/Article/4404801/remarks-by-under-secretary-of-war-for-policy-elbridge-colby-at-the-nato-defense/>

NATO is the foundation of Europe's military defence. The Alliance is undergoing a fundamental transformation to strengthen its deterrence and defence in response to the Russian threat. At the same time, NATO is becoming more European as greater responsibility for the continent's conventional defence shifts to Europe. The various components of deterrence and defence are being developed comprehensively. Key areas include defence planning, capabilities and forces, command and force structure, command and control systems, exercises, operational support functions, logistics, host nation support and force sustainment.

In future NATO defence planning, member states' capability targets will remain highly demanding, reflecting the deteriorating security environment and the greater responsibility of European member states for Europe's defence. The Allies agreed to increase their defence spending at the 2025 NATO Summit in The Hague. A new defence investment target was set at 5% of gross domestic product (GDP) annually to be met by 2035, representing a clear increase from the previous target of 2%. Allies will allocate at least 3.5% of GDP annually to military capabilities and up to 1.5% of GDP annually on defence- and security-related spending. For many Allies, meeting this commitment will entail difficult financial decisions.

The NATO integration of Finland and Sweden is progressing as planned. Finland's expertise and defence capability are valued within the Alliance. Significant expectations are placed on Finland to defend its own territory and to support Allies. NATO's military presence in Finland is becoming an established part of the Alliance's defence. It enhances deterrence in Finland and Northern Europe and is one manifestation of the increased importance of the Arctic for the Alliance.

Nuclear weapons are an integral part of NATO's deterrence and defence, alongside conventional capabilities and air and missile defence, supported by space and cyber capabilities. A credible nuclear deterrence is the foundation of the Alliance's security.

The EU has taken concrete steps to strengthen Europe's defence capability and its role as a regional actor. The EU has launched significant initiatives to develop European defence, through funding and legislation. These measures are primarily focused on identifying European capability needs, supporting the production capacity, funding and operating environment of the defence industry and promoting military mobility. They also support the implementation of NATO's plans. Finland's accession to NATO does not lessen the importance of bilateral and multilateral defence cooperation but rather reinforces it. While Nordic cooperation has intensified considerably, there is still substantial untapped potential.

The escalating situation in the Middle East also affects security in Europe. US and Israeli strikes against Iran, as well as Iran's strikes against several countries in the region and its blockade of the Strait of Hormuz, have created long-term and far-reaching uncertainty. The conflict is drawing global attention away from Russia's war of aggression against Ukraine, benefiting Russia through higher oil prices, tying up Allies' resources and risking weakening the focus on countering the long-term threat posed by Russia.

Figure 2. Finland's membership to EU and NATO complement each other.



3 Development of defence

Finland's defence will be designed to meet the demands of the significantly deteriorated security environment, as well as the objectives and commitments related to NATO's collective defence. Finland's defence capability is based on a strong national defence capability as part of NATO's deterrence and defence. National military service, a large reserve and a strong will to defend the country remain the foundations of Finnish defence.

Finland's military-geographical location on NATO's eastern flank places significant demands on its defence. Finland will need to sustain its capability to counter broad-spectrum influencing, resist protracted military pressure and, in the worst-case scenario, fight large-scale wars that may last for years.

Finland is building deterrence and preparing to defend itself against the use of military force together with Allies, based on plans and arrangements prepared and rehearsed in advance. Finland is creating the conditions for cooperation with Allies, for NATO presence in Finland, for the reception of Allied forces and for the provision of host nation support. Exercises are a key element of maintaining readiness. However, Finland must also be prepared for the possibility that Allied support could be delayed.

The military defence of Finland's territory is part of a larger geographical area stretching from the Baltic Sea region to the Nordic countries, the Norwegian Sea, the Arctic Ocean and the North Atlantic in the Arctic region. In addition to defending its own territory, Finland is also committed to defending other NATO member states. The Finnish Defence Forces uses the same forces and capabilities both to defend the territory of Finland and to contribute to NATO's deterrence and defence. The increase in commitments relative to available capabilities and forces may affect the current level of participation in military crisis management. NATO's capability requirements are likely to increase further as the United States transfers responsibility for the deterrence and defence of Europe to European Allies.

The Finnish conscription system produces a large, well-trained and capable reserve that enables the defence of the whole country. Also, as a member of the Alliance, the Finnish conscription system produces a large, well-trained and capable

reserve that enables the defence of the whole country. Finland will improve the conscription system both in terms of both quality and quantity, in line with the military needs of homeland defence, while considering its societal impact. This work will consider shrinking age groups and the growing need for technological skills. Financial benefits for those liable for military service will be improved, for example by raising the level of daily allowances.

The full potential of voluntary national defence will be leveraged. The implementation of the proposals presented in the 2025 final report of the working group reviewing the desired end state of voluntary national defence will strengthen the effectiveness of voluntary national defence training. The training serves both individual skills and war time units and the focus of preparedness training is shifted towards critical needs in emergency and wartime conditions. The duties of the National Defence Training Association (MPK) in emergency and wartime conditions will be developed. Financial aspect to voluntary national defence activities will be improved. Enhanced voluntary national defence activities will strengthen the will to defend the country and a large reserve, as well as encourage civilians, especially women, to participate.

The concept of total defence means that in Finland the society and its resources support defence in all security conditions. It is important that infrastructure and logistics are developed with the needs of total defence and preparedness in mind. Moreover, sufficient resources must be ensured for both military and civilian intelligence as part of the efforts to strengthen total defence.

Bilateral and multilateral defence cooperation between Allies will support NATO's deterrence and defence and create conditions for receiving and providing support even before activating NATO's plans and Article 5. Finland will intensify cooperation with key Allies and multinational frameworks. The implementation of the DCA and cooperation with the United States will be further strengthened.

The foundation of Finland's military capabilities is solid, but over the years a backlog of maintenance and improvements has accumulated, which must be addressed as soon as possible. Finland development of defence capabilities takes into account national capability gaps and requirements, the capability targets set to Finland by NATO's Defence Planning Process (NDPP), technological advancements, as well as lessons learned from Ukraine and other recent conflicts.

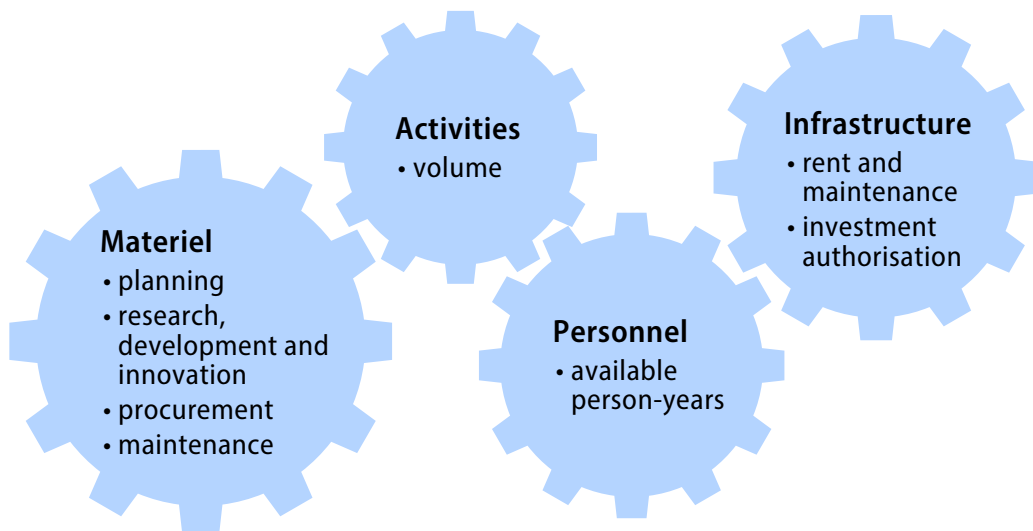
Finland's defence is being developed in a long-term, systematic, and comprehensive manner, based on the Government's 2024 Defense Report. This

work will emphasise the role of multi-domain operations (MDO)², covering all services and operational domains. Alongside these long-term development efforts, Finland will promote functions that enable rapid reprioritisation towards capability development, such as innovation and counter-unmanned system (C-UxS) capabilities.

A guiding principle in developing Finland's defence is maintaining a balance between the different components of the defence system: personnel, operations and training, materiel, and infrastructure. Sustaining the defence system is an element of this balance and the FDFs level of readiness, operations and training volumes have also influence to that. Procurement of equipment and materiel alone is not sustainable in the long term. In addition to defence materiel, development efforts will also touch force structure, concepts and training in the Finnish Defence Forces.

Figure 3. Interdependence of the different components of defence system development.

Changes to one component will affect all components



2 Multi-domain operations (MDO) mean the orchestration of activities across all services and operational domains. The five operational domains of warfare – land, sea, air, cyber and space – are increasingly interrelated. In MDO, military activities are synchronised with non-military activities across all operational domains and environments to create converging effects at the speed of relevance in the physical, cognitive and virtual dimensions. Information defence is implemented in all domains and dimensions.

Over the next ten to fifteen years, the focus of defence system development will be on modernising land defence. The strategic procurement programmes of the Finnish Air Force and Navy will be completed, and the planning and implementation of additional procurements to support them will be started. Development efforts must also cover decision-making capacity, effective cooperation among all authorities and up-to-date legislation.

3.1 Land defence

The aim of land defence is to prevent, and if necessary, repel ground-based attacks against Finland and the Alliance. The foundation of a credible national ground defence capability is a national capability to repel ground attacks, including the development of doctrine aligned with the evolving warfare.

The focus will be on increasing the procurement readiness and the deployment readiness of the procured new systems of land defence, improving close combat and long-range fires, addressing infrastructure requirements arising from new weapons systems, as well as sustaining materiel self-sufficiency in emergency conditions.

The process of modernising land defence has been under preparation for years. It is divided into a large number of projects which together will contribute to building the Finnish Army of the next decade. The modernisation process is a strategic capability programs comparable in scale and impact to the HX Fighter Programme of the Finnish Air Force and the Squadron 2020 programme of the Finnish Navy.

The Finnish Army will be developed in a balanced manner together with Allies, taking into account all service branches. New capabilities, such as unmanned systems (UxS), counter-unmanned systems (C-UxS), electromagnetic warfare systems (EWS) and long-range precision fires (LRPF), will be integrated into existing systems. Unmanned systems will be procured to support reconnaissance and the use of fires at different levels of command and control, supplementing combined-fires systems against both ground and aerial targets. Additional unmanned systems will be procured to support land combat and logistics. They must be rapidly and cost-effectively scalable, both nationally and with Allies. From a systems perspective, the process of modernising land defence is also linked to the development of the Finnish Air Force, the Finnish Navy, establishments subordinate to Defence Command Finland and the forces and systems of the Finnish Border

Guard. Capabilities will be sustained, replaced or developed, and command and force structures, as well as their deployment and operating principles, will be developed based on lessons learned from recent wars.

Multiple launch rocket systems (MLRS) are being upgraded, and a decision has been made to procure an additional fleet of armoured howitzers. The firepower, protection and mobility of the infantry as well as the Finnish Army's command and control systems and engineer capabilities, will be developed as outlined in the 2024 Government Defence Report. In addition, basic equipment, such as ammunition and soldiers' personal equipment, will be sustained and renewed, defence materiel will be maintained, and the necessary infrastructure will be developed.

3.2 Maritime defence

The aim of maritime defence is to prevent and, if necessary, repel attacks by sea against Finland and the Alliance. Protecting sea lines of communication in all security situations is vital for Finland and for the Alliance.

The Finnish Navy must strengthen its capability to operate as part of the Alliance and, if necessary, to command multinational maritime operations across the Baltic Sea region and beyond. Maritime defence must have capabilities for comprehensive surveillance of sea areas (air, surface, subsurface, littoral and coastal surveillance and electromagnetic spectrum), for maintaining permanent readiness to protect territorial integrity, for multilayered and long-range fires as part of the defence system, and for a sustained presence at sea.

The capabilities of the Finnish Navy will improve significantly by the early 2030s, when four Pohjanmaa-class multi-role corvettes (Squadron 2020) enter service. The corvettes are important components of Finland's defence system, forming the backbone of maritime capability for years to come.

Parallel to enhancing capabilities it should be noted that fast-attack missile craft of the Hamina class and minelayers of the Pansio-class will reach the end of their lifecycle by the mid-2030s which will subsequently decrease Finnish Navy's capabilities. Replacing these capabilities is comparable in significance and financial impact to the Squadron 2020 programme. Minesweeping capabilities at sea must be strengthened extensively to safeguard the Finnish Navy's freedom of action and sea lines of communication. In the near future, Finland must also decide on funding for the construction and deployment of both a flagship for the mine countermeasures group, and a multi-role flagship and supply ship.

Finland's coastal forces will undergo an extensive reform. In future, the coastal forces will require more versatile and long-range firepower and surveillance capabilities, continuous (24/7) mobility, modularity and enhanced protection compared with current capabilities. Unmanned and remotely operated systems, along with corresponding countermeasures, must be integrated into naval and coastal forces.

Figure 4. Working group familiarised itself with naval defence in Upinniemi in February 2026.



3.3 Air and missile defence

The goal of Finland's air and missile defence is to repel airborne attacks. Air operations aim to achieve local and temporal air superiority to enable national and NATO operations. Key capabilities are adaptable and multi-layered air defence and the ability to reduce threat through offensive air operations. The ability to protect functions vital to society and guard against large-scale attacks depends on defensive actions based on common operational picture (COP), which also enables society-wide alerts and physical protection.

The capability of air defence system will be improved by increasing ranges and by adding layers. Multilayered air defence is built on a mix of high-end and low-end (HI/LO mix) ground-based air defence (GBAD) systems and combat aircraft able to target enemies at different altitudes and ranges.

The nature and scale of the air threat have evolved while the number of GBAD troops and systems in the Finnish Defence Forces has declined. Additional funding is required to increase the number of GBAD systems and replace decommissioned systems. Alongside traditional counter-air capabilities and counter-unmanned system (C-UxS) capabilities, Finland must also invest in cruise and ballistic missile defence. Air defence must be versatile against a broad spectrum of air threats. Cost-effective defensive and offensive capabilities are needed in sufficient volumes to counter massed threats. Large-scale attacks often involve a mix of different threat systems with varying roles. Low-speed, low-cost drones should be countered with relatively inexpensive and mass-produced systems, such as interceptor drones or anti-aircraft artillery, whereas advanced systems, such as GBAD capable of intercepting ballistic missiles, are required to counter high-speed and high-value missile systems. Passive air defence methods, such as cover and deception, should also be employed.

F-35 fighters and the David's Sling system will be introduced to service in the coming years, significantly improving the performance of Finland's air defence. The full use of these systems requires improvements in command and control and the COP (Common Operation Picture), including the introduction of automation and AI solutions.

Air surveillance capabilities must be modernised as ageing systems are decommissioned, and the detection of threat systems becomes more difficult. Low-flying micro-drones and projectiles present a particular challenge for situational awareness. Possible ways of improving low-altitude detection capabilities, such as airborne early warning and control aircraft, are being considered together with Allies, with Nordic cooperation as one option. Capabilities for detecting and intercepting ballistic missiles will also be developed. Space-based capabilities must be better utilised to improve the COP, and the ability to manage and control the electromagnetic spectrum must be strengthened.

European air-to-air refuelling capacity must be increased to enable Allied air operations. The procurement of a new national training solution must begin to ensure the quality of F-35 pilot training and to replace the current Hawk jet trainer fleet.

Figure 5. Working group familiarised itself with air and land defence in Rovaniemi in March 2026.



3.4 Space

Space is a new domain of warfare. It is a strategic enabler necessary for all branches and arms to conduct their individual and joint operations effectively. Military space capabilities and the Finnish Defence Forces' future activities in space have societal significance and an international dimension beyond defence.

Space capabilities include space situational awareness, certified satellite services, the active protection of national space assets and the ability to counter an adversary's space capabilities. Access to space must be safeguarded in cooperation with Allies and partners. Because space is a global domain beyond the borders of sovereign states and a fast-developing ecosystem, the Finnish Defence Forces requires additional resources and new types of skills, practices and organisational structures. There is strong space expertise in Finland, which also benefits the Finnish Defence Forces.

In the forthcoming space strategy for defence, the Finnish Ministry of Defence identifies several major investment needs, including intelligence, surveillance and reconnaissance capabilities in space, satellite communications capabilities and the ability to establish and sustain space situational awareness.

3.5 Joint capabilities and essential enablers for defence

3.5.1 Special operations forces

The Finnish Defence Forces will continue to develop the joint operational capabilities of its special operations forces, both internally within the Defence Forces and externally in collaboration with other authorities and Allies. Command structures, organisation, personnel, readiness and infrastructure are being developed with regard to homeland defence, unmanned systems and Allied interoperability. The personnel structure and the troop production are being reformed to ensure that the special operations forces reserve is able to adapt to the evolving warfare. Legislation and powers required for special operations will be modernised, taking into account changes in the security environment.

3.5.2 Command and control systems, cyber defence, electromagnetic warfare and information defence

A key objective of the command and control (C2) system is to ensure that the Finnish Defence Forces has the capabilities necessary for multi-domain operations (MDO). This will be achieved by improving the compatibility of existing C2 systems, expanding interoperability and building a national set of next-generation C2 system capable of making full use of emerging and disruptive technologies. The rise in ICT costs puts a strain on resources at a time when compatible C2 systems are essential for effective operations.

Finland's military cyber defence will be improved by strengthening national systems' surveillance and response capabilities, enhancing cyber situational awareness and proactive cyber defence, and by increasing the level of automation. Efforts will be made to link these measures as extensively as possible to domestic industry and to a large and capable reserve. National concepts, responsibilities and legislation must be revised to safeguard cyber sovereignty and ensure the defence of Finland in the cyber domain.

As a result of the rapid changes in the operating environment, C2 systems and cyber defence concepts, tactics and capabilities must be improved without delay, and the speed and flexibility of procurement processes must be increased. System interoperability must be ensured across all national, bilateral and multilateral arrangements and as part of NATO. Attention should be paid to big data management, the integration of data across the armed forces and society, battlefield transparency, the survivability of ICT infrastructure and the importance of the electromagnetic spectrum.

Advances in electromagnetic warfare and information defence are rapid, and this must be taken into account in all development efforts.

3.5.3 Logistics and infrastructure

Logistics will be improved to enable the operations of national and multinational troops in Finland. Logistics command and control will be safeguarded by procuring mobile or transportable command posts and C2 toolsets that enable dispersal. Force and equipment protection will be improved through both active and passive means.

The capability to receive NATO forces and materiel and to provide the logistical support for operations will be ensured by strengthening logistics forces, updating logistics doctrines and by procuring materiel. The ability to evacuate and transport heavy materiel by road will be safeguarded by procuring suitable equipment.

The field medicine system will be comprehensively improved in collaboration with civilian healthcare. The focus will be on enhancing medical evacuation capabilities and improving the delivery of life-saving first aid.

Military mobility will be enhanced by improving transport infrastructure in collaboration with other branches of government. The focus will be on dual-use solutions, and every effort will be made to utilise available international financing mechanisms. Key ports and airfields, fuel infrastructure, fuel distribution systems and road and rail connections for the movement and sustainment of forces will be prioritised.

Military infrastructure, including garrisons, ports, airfields, exercise areas, stockpiles, shelters and C2 facilities, is an integral part of the defence system. Infrastructure development, as part of capability development, ensures the usability, protection and lifecycle management of other systems. Work on Air Force air bases continues to enable dispersal of F-35 fighters and more extensive Allied operations in Finland.

The increase in the volume of operations necessitates more extensive stockpiling, efficient material flows in logistics and expanded maintenance and servicing systems. Materiel procurements will consider the requirements for storage space and conditions, as well as the spare parts, equipment and personnel needed for maintenance.

Achieving full capability to execute national and NATO defence plans will require substantial investment in military infrastructure well into the early 2030s.

Finland's defence will be strengthened by building the facilities and structures necessary for future capabilities, increasing munition stockpiles and relocating critical functions, such as command and control, underground. The health security of barracks will be ensured through sufficient renovations. Force reception capabilities, exercises and stockpiling will be developed to meet the requirements of collective defence, and facilities will be established for Allied headquarters in Finland. These projects will seek to make maximum use of NATO common funding.

3.5.4 Technology and defence industry

The threat environment and the accelerating pace of innovation cycles clearly demonstrate the technology leap that has taken place and compel the defence administration to step up its technology, research, development and innovation (TRDI) activities. Proactive technological situational awareness within the defence administration and its ability to apply new technologies must be strengthened. To this end, the defence administration must reshape its TRDI activities, allocate more financial and human resources to these efforts and pursue close cooperation with the research community and industry. By the 2030s, at least 2% of defence expenditure will be allocated annually to TRDI in accordance with EU targets. This will enable the defence administration to develop new capabilities, acquire the necessary skills and strengthen its technological warfighting capability. Moreover, it will create opportunities for Finnish defence exports and generate life-cycle savings from these capabilities.

It is essential to strengthen the defence technological and industrial base and increase production capacity to safeguard Finland's military security of supply and access to critical technologies. There is significant economic potential in enhancing the capability and capacity of the defence industry. Achieving this goal calls for a number of measures, including support for defence industry operators in scaling up their production, trade missions, international materiel cooperation, streamlined administrative processes and sufficient strategic funding (e.g. Tesi, Business Finland, Finnvera). Practices relating to supporting the defence industrial base will be developed across government.

The evolving operating environment, the ramp-up of the European defence industry and Finland's NATO membership create significant opportunities for Finland and its industry. International materiel cooperation plays a central role in realising this potential. It is guided by the capability development needs of the Finnish Defence Forces and by the skills requirements in the defence industry and defence technology sectors. The aim is to leverage the leading expertise in the defence administration and industry to support multinational projects and to create positive dependencies and beneficial partnerships. The Finnish defence industry's areas of expertise include land defence, command and control systems and Arctic capabilities.

3.5.5 Personnel

The evolving operating environment and Finland's accession to NATO have significantly changed personnel needs and requirements across the defence administration. At present, personnel numbers do not reflect the demands of the changed operating environment. Increasing personnel numbers alone is not sufficient; resources must also be allocated to support skills development, workplace wellbeing and coping at work. Ensuring a flexible system with competitive and motivating terms of employment will also help the defence administration remain an attractive workplace.

Advancing national objectives requires Finland to contribute to and actively influence international activities, particularly with regard to NATO's deterrence and defence, NATO commitments and the EU. The presence of NATO and Allies in Finland (MCLCC, FLF Finland, NCISG³) and the provision of host nation support to

3 MCLCC = Multi-Corps Land Component Command, FLF = Forward Land Forces, NCISG = NATO Communications and Information Systems Group.

foreign forces operating in Finland increase the need to prepare political decisions, address legal issues, provide implementation guidance and resolve financial matters. The EU is also active across several forums in developing capabilities, strengthening the defence industry and improving military mobility. The Ministry of Defence needs additional human resources to prepare and coordinate new technology-related initiatives of NATO and the EU.

The total number of person-years in the Ministry of Defence was 175 in 2025. At present, there are clearly too few employees to manage all the tasks assigned to the Ministry. It is essential to raise the number of person-years to around 250 by 2030. The Ministry of Defence intends to increase the number of person-years in international assignments to 20 by 2030.

The Finnish Defence Forces employed 13,709 people in 2025. Approximately 2,000 new positions will be created by the early 2030s. The Finnish Defence Forces has brought forward the creation of 500 additional positions, related to the deployment of new capabilities, to the period 2026–2029. It is anticipated that further decisions to increase personnel numbers will be necessary in the coming years. The assignment of personnel to NATO command structures is proceeding as planned, and it is estimated that the positions assigned to Finland will be filled by 2029. The human resources implications of NATO functions to be established in Finland must also be taken into account. The total number of Finnish soldiers, including defence attachés, serving abroad in international positions is estimated to reach around 200 by the end of 2026 and around 300 by the end of 2029.

To ensure sufficient resources for the new duties of the Finnish Defence Forces, legislation must be amended to enable more flexible deployment of salaried personnel, conscripts and reservists to Defence Forces duties in Finland and abroad. Gender equality and non-discrimination perspectives are integrated into the activities of the Ministry of Defence and its branch of government.

By the end of 2026, the defence administration will examine the need to increase the wartime strength of the Finnish Defence Forces. It is also collecting experience from expanding the reserve and from raising its upper age limit to 65 years.

4 Financial resources

Sufficient long-term funding is necessary to ensure Finland's defence capability. The current operating environment makes the planning of the defence administration's activities and resources increasingly dependent on funding levels agreed across electoral terms.

Finland's defence expenditure has been around 1.3% of GDP annually for decades. Since 2021, the level of spending has exceeded 2% of GDP annually due to the Finnish Defence Forces' strategic programmes in the 2020s.⁴ In addition, since 2022, the defence budget has grown because of the additional appropriations allocated to readiness and preparedness and to replacing the defence materiel donated to Ukraine.

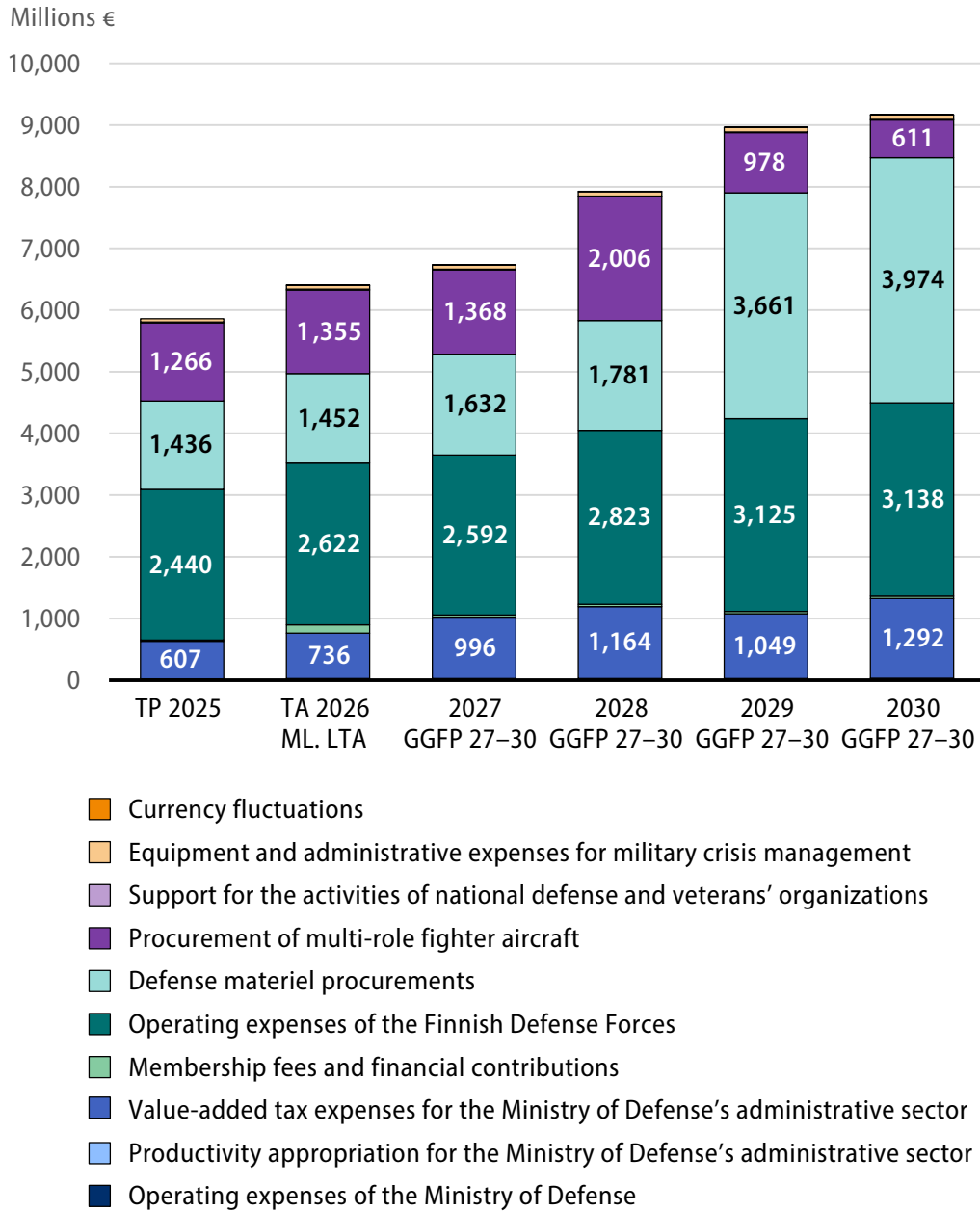
In the 2026 Budget, defence expenditure is around EUR 7.7 billion. This figure includes the budget for the Ministry of Defence's branch of government (i.e. the defence budget), which is around EUR 6.4 billion, as well as approximately EUR 550 million in pensions expenditure and approximately EUR 660 million in expenditure of the Finnish Border Guard.⁵

The 2026 defence budget includes EUR 2.6 billion in operating expenses of the Finnish Defence Forces, EUR 1.5 billion in materiel procurements and EUR 1.3 billion in expenditure related to the Finnish Air Force's F-35 strategic programme. Value-added tax expenditure is around EUR 900 million.

4 One tenth of a percent corresponds to around EUR 300 million at 2026 prices.

5 NATO has a common definition of defence expenditure. The expenditure in the Budget that fall under this definition include the main title of expenditure number 27 (Ministry of Defence's branch of government) and the expenditure of other branches of government that are related to other forces that can operate as part of military operations during emergency conditions (in Finland this means homeland defence and border control by the Finnish Border Guard), the expenditure of peacekeeping operations (including the Ministry for Foreign Affairs' share of military crisis management operations) and the retirement pensions payments in the defence administration.

Figure 6. General Government Fiscal Plan for the defence budget in 2027–2030.



Some degree of maintenance backlog in Finland's defence capability has built up over the years and needs to be addressed as soon as possible. The need is even more urgent given the difficult and unpredictable operating environment. Moreover, as Finland is committed to burden-sharing in NATO, there must be an agreement across electoral terms that the level of Finland's defence expenditure is

at least the target level agreed in NATO. The Allies agreed to raise the level of their defence spending at the 2025 NATO Summit in The Hague. Finland is committed to raising its defence expenditure to at least the NATO target of 3.5% of GDP annually by 2035.

In addition to the defence expenditure commitment, the Allies are also committed to allocating up to 1.5% of GDP annually to defence- and security-related spending by 2035. In Finland, this spending includes the statutory preparedness and readiness costs of different branches of government, estimated at around 2.4% of GDP in 2025, which are primarily intended to strengthen societal resilience. While these defence- and security-related costs are not included in the budget of the Ministry of Defence's branch of government, they constitute part of Finland's comprehensive security and are critical to homeland defence. They also support total defence as part of comprehensive security.

4.1 What does a war cost?

The fundamental purpose of developing and sustaining defence capability in peacetime is to create credible military deterrence that preserves peace and prevents Finland from getting into a military crisis, although such capabilities also prepare for the use of military force. Deterrence and preparedness are invariably preferable to a crisis both in economic terms and from a human perspective.

Since Russia's full-scale invasion of Ukraine in 2022, Ukraine has experienced a massive loss of capital value and a decline in investment due to infrastructure damage and the rapid depletion of defence materiel, among other factors. Based on the situation at the end of 2025, reconstruction and recovery in Ukraine are estimated to cost around USD 588 billion.⁶ In November, Ukraine claimed USD 43 billion from Russia for environmental damage caused by the war.⁷ Reconstruction is estimated to take up to four decades. Moreover, its environmental

6 UN News 23.2.2026, <https://news.un.org/en/story/2026/02/1167016>, retrieved on 27 April 2026

7 [renewablematter.eu, https://www.renewablematter.eu/en/ukraine-demands-43-billion-russia-environmental-damage-war](https://www.renewablematter.eu/en/ukraine-demands-43-billion-russia-environmental-damage-war), retrieved on 27 April 2026. Ukraine's demand is based on a research report *Climate Damage Caused by Russia's War in Ukraine – 36 months*, published by Initiative on GHG Accounting of War, an association of experts, in October 2025.

impact is estimated to be significantly negative.⁸ Ukraine's gross domestic product declined by around 27% between 2022 and 2025. Ukraine's defence expenditure was around 3.5% of GDP annually until 2021. Since Russia's invasion in 2022, defence spending has risen to over 30% of GDP annually⁹. At the same time, Ukraine's population has plummeted from 46 million in 2014, when Russia began its war against Ukraine, to 38 million in 2024.¹⁰

The poor growth potential of Russia's economy is likely to weaken further because of the war against Ukraine.¹¹ However, Russia is waging war largely outside its borders, which is economically less burdensome. Russia's finances are under strain, and its outlook is uncertain, but a collapse does not appear likely at present. If Russia's economy were to collapse, it could lead to social unrest, which could also have spillover effects in Finland. Even in the event of a ceasefire, it is highly likely that Russia's war industry would continue producing weapons systems and equipment for its armed forces. According to estimates at the end of 2025, Russia has incurred between 1.2 and 1.3 million casualties (killed and wounded).¹²

During the most severe years of the Winter War and the Continuation War, Finland's defence expenditure exceeded 30% of GDP annually.¹³ It is estimated that defence spending would again reach at least this level were Finland to enter a war. The human cost and intangible losses of war cannot be quantified.

4.2 Defence sustainment and development costs

Finland's defence capability will be developed on a threat-informed, needs-driven basis that accounts for changes in the security environment. A guiding principle for developing Finland's defence is a balance between the different components of the defence system: personnel, operations and training, materiel, and infrastructure.

8 renewablenmatter.eu, <https://www.renewablenmatter.eu/en/ukraine-demands-43-billion-russia-environmental-damage-war>, retrieved on 27 April 2026.

9 SIPRI Military Expenditure Database, retrieved on 2 April 2026

10 World Bank, <https://data.worldbank.org/indicator/SP.POP.TOTL?end=2024&locations=UA&start=2014>, retrieved on 27 April 2026

11 Bank of Finland Institute for Emerging Economies (BOFIT), Briefing on Russia, 30 March 2026.

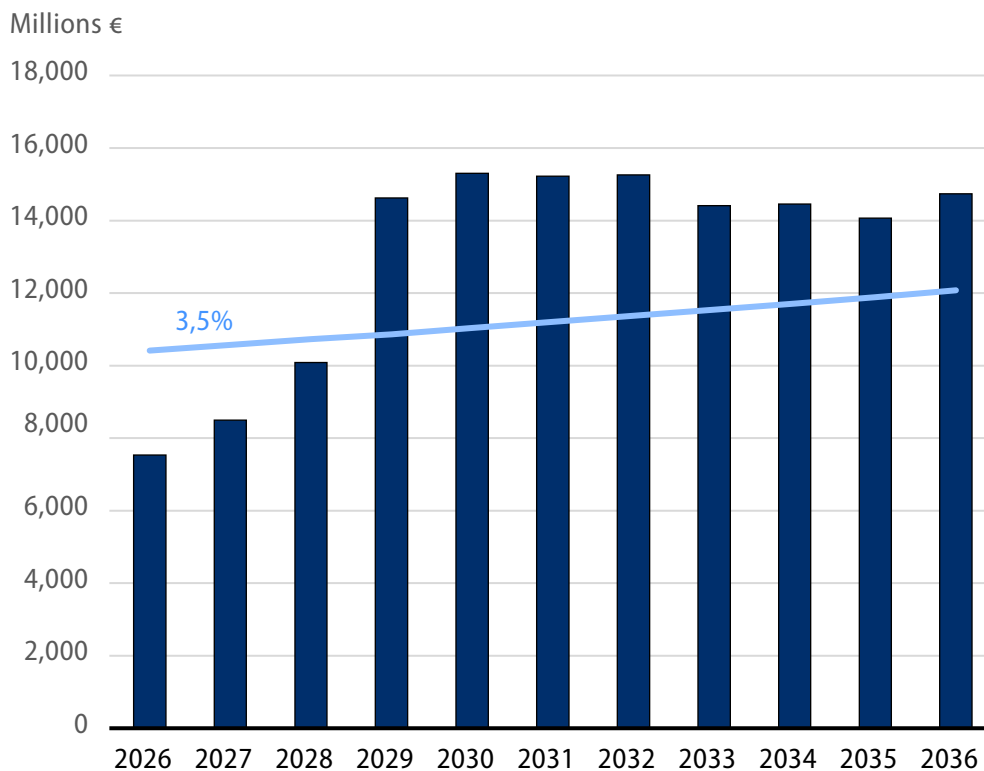
12 Yle, 30 December 2025.

13 Sotataloustietoutta V [On war economy] (1996)

Only indicative estimates can be made of the costs of defence sustainment and development over the next decade. Cost developments depend on a number of factors, including the general price level, the production capacity of the defence industry, technological advances and the availability of products and services. The rise in the prices of defence materiel is likely to accelerate due to ongoing crises, further increasing the uncertainty of these estimates. Cost estimates will become more accurate as the planning progresses.

The costs of the defence sustainment and development needs outlined in this report are expected to exceed NATO's target of 3.5% of GDP annually, but they reflect a genuine need for improvement in the period 2026–2036, driven by the current operating environment. As Finland is located at NATO's frontline, it is particularly important to strengthen its defence and set an example that encourages Allies further from the frontline to commit to the rapid build-up of NATO's collective defence.

Figure 7. Estimated defence expenditure needs for maintaining and developing defense capabilities compared to NATO's target level for defense spending.



Being at NATO's frontline also means that the resilience of the civilian society would become an integral part of the defence of Finland should a war break out. For example, there are no military hospitals in Finland. Instead, the surgical readiness and preparedness of central hospitals under normal conditions form part of the Finnish field medicine system in emergency conditions. This reflects the basic idea of total defence, which forms part of Finland's comprehensive security concept: when society prepares for the worst possible threat – a war – it also prepares for all other types of threats.

4.3 Procurement processes and EU and NATO financial mechanisms

Procurements by the defence administration are based on the capability requirements of Finland's defence system, the safeguarding of military security of supply and relevant legislation. Procurement processes must be further streamlined, for example by amending direct award criteria and by making greater use of joint procurement.

NATO and the EU have several financial mechanisms for defence investment. The NATO Security Investment Programme (NSIP) finances investments that are essential for the implementation of collective defence. To date, Finland has identified potential opportunities for NATO common funding corresponding to a value of approximately EUR 1.6 billion. These projects meet the requirements of NATO's capability programmes. Success in funding applications requires active participation and influence by Finland in multi-stage planning and award processes. To date, Finland's funding proposals have mainly focused on F-35 infrastructure and the development of host nation support. The total amount of funding awarded will be confirmed only after the projects have been completed. Finland's potential to benefit from NSIP funding is expected to increase in the coming years.

The EU has strengthened its defence role by increasing joint procurements, funding and coordination between Member States. It is important to ensure that EU defence funding is allocated in a way that supports NATO and European defence priorities, thereby generating genuine added value for strengthening collective defence. The Commission has proposed allocating EUR 131 billion from the next Multiannual Financial Framework (MFF) to defence and space. The funding received from the EU may be considerable relative to the national share of investment. This requires risk-taking capacity on the part of the Finnish Government, as no EU funding will be awarded without a timely national funding decision.

Efficient procurement and co-financing arrangements require improved resourcing. If Finland fails to allocate significant human resources to co-financing arrangements, it may receive less funding than its contributions warrant.

4.4 Supporting Ukraine

Since 2022, Finland has supported Ukraine by donating defence materiel both from the Finnish Defence Forces' stocks and through procurement arrangements with the Finnish industry. The estimated cost of replacing the materiel donated from the Defence Forces' stocks is EUR 3.2 billion. Finland will continue its materiel support to Ukraine within the framework of an industrial programme worth EUR 660 million and, potentially, through production cooperation with Ukraine.¹⁴ Finland has decided to increase its support to Ukraine by additional EUR 300 million in 2026 and 2027.

¹⁴ The monetary value of the planned materiel deliveries to Ukraine is approximately EUR 378 million in 2026.

5 Conclusions

1. The change in Finland's threat environment and operating environment appears to be permanent. Russia poses a long-term and unpredictable threat to the security of Finland and NATO. Finland is not facing an immediate military threat. However, Finland must be prepared for rapid changes in the security situation. The outcome of the war in Ukraine will shape the development of the security environment. Regardless of the outcome, Russia will pose a significantly greater military threat to the West than before.
2. In addition to the threat posed by Russia, the operating environment is also reshaped by the evolving warfare, technological advances and changes in the transatlantic division of responsibilities.
3. NATO is the foundation of Europe's defence. Europe must, as soon as possible, develop the capacity to assume the primary responsibility for NATO's conventional defence in Europe.
4. Finland's defence will be dimensioned to meet the requirements of the security environment, as well as the objectives and commitments related to NATO's collective defence. Finland's defence capability is based on a strong homeland defence capability as part of NATO's deterrence and defence.
5. The United States is a key ally for European security. Defence cooperation between Finland and the United States is conducted on a long-term basis.
6. The Nordic countries are Finland's most important allies, and Finland must better leverage the potential of Nordic cooperation. Finland must also intensify its cooperation with other key allies and multinational frameworks. The process of deepening the EU's Common Security and Defence Policy must continue.
7. Capability is the key criterion for defence materiel procurement, alongside security of supply, cost effectiveness and Finland's foreign and security policy objectives. Cooperation and interoperability between the EU and NATO, and their complementary roles, are important components of developing the defence technological and industrial base and ensuring security of supply.

8. It is important to strengthen the defence technological and industrial base of Finland and Europe and to rapidly scale up defence industrial production to reduce dependencies on non-European suppliers. As part of this effort, Finland and Europe must also improve their ability to develop, pilot and scale up emerging technologies quickly.
9. It is essential for Finland's defence that it continues to support Ukraine as long as necessary.
10. While the foundation of Finland's military capability is sound, a maintenance backlog has accumulated over the years and should be addressed as soon as possible.
11. Finland's defence is developed on a long-term basis as a coherent whole. The different components of the defence system – personnel, operations and training, materiel, and infrastructure – must remain in balance.
12. Over the next ten to fifteen years, the focus of defence system development will be on modernising land defence and addressing accumulated capability gaps.
13. Finland's air defence will be developed, taking into account multilayered capabilities across services. Large-scale aerial attacks often involve a mix of different types of missiles and drones. Low-speed, low-cost drones should be countered with relatively inexpensive and mass-produced systems, whereas advanced systems are required to counter high-speed and high-value missile systems. Passive air defence methods, such as cover, should also be employed.
14. The conscription system will be improved to match the military needs of homeland defence, while taking into account its societal impact, shrinking age cohorts and the growing need for technological skills. Financial benefits for those liable for military service will be improved, for example by raising the level of daily allowances.
15. Full use will be made of the potential of voluntary national defence, while ensuring sufficient funding. Voluntary national defence activities support a strong will to defend the country and a large reserve and encourage civilians, especially women, to participate.
16. Homeland defence relies on support from society. Total defence will be developed together with other branches of government.
17. At present, personnel numbers within the defence administration do not reflect the demands of the changed operating environment and must be increased significantly.
18. Sufficient long-term resourcing of defence across electoral terms is essential for safeguarding Finland's defence capability.

19. Finland is commitment to the defence investment commitment of 3.5% + 1.5% of GDP annually by 2035, as agreed at the NATO Summit in The Hague.
20. The costs of Finland's defence sustainment and development needs clearly exceed the NATO target of 3.5%, reflecting the real requirements of the current operating environment over the next decade. What is relevant for defence capability is the volume of funding, not the percentage level alone.
21. Finland must make full use of EU and NATO financial mechanisms in its defence development. Procurement processes must be streamlined, for example by amending direct award criteria and by making greater use of joint procurement.

Dissenting opinion of the Left Alliance parliamentary group

Reasoning

Russia's invasion of Ukraine has altered Finland's foreign and security policy position and the security landscape of Europe fundamentally and in the long term. The Left Alliance agrees with the parliamentary working group on defence that the operating environment for Finland's and NATO's defence is unstable and that Russia presents a long-term and unpredictable threat for which Finland must prepare. The Left Alliance maintains that Finland must continue its active support for and assistance to Ukraine. As the war continues, Ukrainians need our solidarity more than ever. Finland and the EU must do their utmost to achieve peace in Ukraine on terms acceptable to Ukraine. That being said, the Left Alliance does not completely agree with the conclusions of the report.

The report fails to describe clearly the drastic changes in the United States' foreign policy, which also affects the security of Finland and Europe and the functioning of NATO. US foreign policy has in many ways become more unpredictable under the leadership of Donald Trump, and this will inevitably affect European security, the situation in Ukraine and the activities of NATO, as has already been observed. Moreover, as Trump has repeatedly threatened to withdraw the United States from NATO, US commitment to the Alliance is no longer self-evident. The war in Iran has demonstrated that the United States can use military force without consulting its allies and with apparent disregard for international law. It is therefore clear that Europe must assume greater responsibility for its own security and reduce its dependence on the United States.

The security of Finland and its people is a key priority for the Left Alliance. Finland has taken responsibility for its own defence and must continue to do so in future. It is clear that, in the current security situation, Finland and Europe must invest in defence and address existing gaps. However, the Left Alliance will not commit to the defence investment commitment agreed by the Allies at the NATO Summit in The Hague. This position was already made clear during the preparation of the Government Defence Report. Rather than focusing on fixed percentages, attention should be directed towards how resources are used, what is economically sustainable and how each investment affects society.

At the same time, the costs of the defence development and sustainment outlined in this report clearly exceed even the NATO target of 3.5%. Parliament should conduct a broad discussion on the financing of these multi-billion-euro needs before drawing conclusions.

In addition to armed defence, other measures are also necessary to ensure the security of the Finnish people. Investment in people is essential: in their mental health, healthcare, livelihoods and young people's confidence in the future. Social cohesion and trust in society become even more important in times of uncertainty and threat. Without wellbeing, there can be neither a strong sense of security nor a strong will to defend the country, which ultimately forms the foundation of Finland's defence. The Left Alliance reminds that defence funding cannot be considered in isolation from other policy areas and underlines that economic policies that increase inequality weaken comprehensive security.

As a NATO member, Finland's defence and foreign policy must continue to be based on a comprehensive concept of security and respect for human rights. Within NATO, Finland should pursue close cooperation especially with the Nordic countries. Finland must continue to promote nuclear disarmament and oppose the proliferation of weapons of mass destruction. Nuclear weapons should not be brought into Finland.

Finland's approach to the Arctic should extend beyond military considerations. Finland must actively advocate that all activities in the Arctic region respect environmental carrying capacity, climate protection, sustainable development principles and the rights of indigenous peoples.

It is important that Finland's arms exports are conducted responsibly. Controls on arms exports should also be extended to imports, and all arms trade should comply with human rights impact assessments and international humanitarian law. The Left Alliance calls for all arms trade with countries such as Israel to cease. Finland should minimise capability-related dependencies on countries whose actions conflict with its foreign policy in order to avoid risking the security of its defence supply.

The development of autonomous weapon systems must be addressed while these technologies are still emerging. As artificial intelligence advances, such systems will become increasingly difficult to understand or predict. The development, production and use of autonomous weapons should be prohibited through an international treaty. Finland should support the drafting of a politically binding instrument on autonomous weapons systems with the aim of establishing a legally binding international treaty, complemented by comprehensive national legislation.

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