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Photo: Toomas Tuul, Visit Tallinn

Wishing you Merry Christmas and truly resilient and happy New Year!

We at Baltic Defence Weekly wish all our readers across the Baltic region and beyond Merry Christmas and a Happy New Year!

In times like this, your support and trust in our newsletter matter more than ever.

We thank all our subscribers, partners, readers and contributors for your dedication. Let the new year strengthen our cooperation, deterrence, and shared values further.

Keep supporting regional security, allied solidarity, and safer future for our societies!

ALSO IN THE NEWS



Frankenburg Technologies has successfully tested its Mark 1 air defence missile.

Source: Frankenburg Technologies

Frankenburg Technologies successfully tests its counter-drone missile in NATO base in Latvia

On December 12, at the Ādaži military training area in Latvia, Frankenburg Technologies successfully demonstrated the capabilities of its next-generation air defence missile Mark 1, completing a full-cycle interception and destruction of an aerial target.

Mark 1 air-defence missile was tested against high-speed attack drones like those Russia launches at Ukraine

The company noted that this marks a significant breakthrough in defence technology development. The Mark 1 missile is designed for scalable mass production using commercially available components, and its development took just 13 months. The company aims to begin producing hundreds of units per day in late 2026, relying on widely available components to meet demand.

NEWS

Frankenburg Technologies successfully tests its counter-drone missile in NATO's Adazi base in Latvia

European defence tech startup **Frankenburg Technologies** announced this week that it has successfully tested its Mark I air-defence missile against high-speed attack drones like those Russia launches at Ukraine.

As the West is hunting for cost-effective ways to counter cheap threats, the company says its Mark I missile will cost less than the cheapest Shahed-type drones.

It aims to begin producing hundreds of units per day in late 2026, relying on widely available components to meet demand.

The company carried out live-fire field tests on December 12 at the Latvian NATO base Adazi, using the short-range interceptor missile to strike a 2-meter drone traveling at 200 kilometers per hour.



In an interview to Bloomberg, the company describes the system as a “breakthrough,” allowing defenders to reserve higher-end hardware such as Patriot batteries for bigger threats.

Russia’s nearly four-year war in Ukraine has rapidly changed modern battlefield tactics, including waves of low-cost attack drones. Many companies are developing low-cost air-defence solutions in response, such as interceptor drones.

Frankenburg said its Mark I missile — which flies at more than 1,000 kmph — will cost less than the cheapest Shahed-type drones, which the Center for Strategic and International Studies estimates to be in the range of \$35,000 per unit.

The low end of most air defence missiles costs around \$500,000, said Frankenburg CEO **Kusti Salm**.

The Center for New American Security estimates the unit cost for Raytheon’s Coyote interceptor is about \$125,000; the Tamir missiles used in Israel’s Iron Dome are estimated to cost between up to \$100,000.



Moment before impact.

Photo: Frankenburg Technologies

Missiles are also typically in short supply, Salm said, with production limited to just a few hundreds units for a given product line each year. Relying on widely available components, Frankenburg aims to begin producing hundreds of units per day in late 2026.

Frankenburg Technologies that has its head office in Tallinn, has recruited chief engineers who helped to design Europe’s IRIS-T and the UK’s SPEAR 3 missiles. The company said it is currently delivering missiles to two NATO countries.



Mark I. Photo: Frankenburg Technologies

UKRAINE UAS SHOWCASE Ukraine Battlefield-Proven UAS Showcase in Tallinn

Powered by Ondas Capital + Baltic Ghost Wing Center of Excellence, Tallinn will become a meeting point for systems that work in real conditions.

On 27–28 January 2026, Ukrainian and Ukrainian inspired unmanned systems from Europe and all over the world will present battlefield-proven technologies that have been used, tested, and improved during real operations.



Message from the organisers:

“This is not a lab demo. This is not a pitch event. This is technology shaped by real use and real responsibility.

Exhibitor and attendee access is limited so hurry to save your spot!

The Battlefield-Proven UAS Showcase brings together operators, defense decision-makers, investors, and industry leaders for two days of live demonstrations, closed briefings, and direct conversations with the teams behind the systems.”

Link for registration:

<https://lnkd.in/g7WgNicj>

For questions about travel, participation, or sponsorship, please contact: events@ondascapital.com

Ukrainian Tech Showcase

A two-day showcase of Ukrainian unmanned systems technology, featuring insider briefings, live demonstrations, and high-level networking.

Powered by
Ondas Capital / Baltic Ghost Wing
Tallinn, Estonia
January 27–28, 2026

DARKSTAR**Founder Ragnar Sass: it's time to build what matters!**

Looking back to 2025, **Ragnar Sass**, founder of **Darkstar**, wrote in LinkedIn this week:

"For the Darkstar team, 2025 has been a very wild ride. Just today we signed our 7th investment. We act differently - from day 0 we agreed to run like a wartime VC, helping the most promising founders who can WIN the war.

Four of our teams' products are already working on the Ukraine frontline and three will get there in next quarter. We kickstarted the Fund in July - In the first 6 months, we've deployed €6.4m, with the biggest ticket so far at €1.5m. And yes - all of these startups have been part of our Bootcamps in Ukraine."

Sass added:

"And things are not slowing down anytime soon in the near future. Even if there will be a temporary peace agreement at some point, it is not real - it will just accelerate the rearming of Europe. As risks will only grow faster.

Anyone saying it's too late to enter Defence Tech is dead wrong. Innovation speed is only increasing. We don't even know what products we'll need in the near future. And what skills do we need to build them?

Luckily, we have seen a growing number of most hard working founders move into Defence Tech. Not only from Ukraine, but from all over Europe. And for most folks the next few weeks are not a holiday, but just a calmer time to focus and build some very cool stuff."



Darkstar founders and investors. Source: Darkstar:

RASK: first-hand experience from Ukraine is becoming indispensable for defence sector legal advisor

Artur Sanglepp, Attorney-at-Law at **RASK Attorneys-at-law** who is closely involved with the defence ecosystem in both Estonia and Ukraine, writes in **RASK Defence Briefing** about his experience in Ukraine.

► What has been your exposure to the defence industry?

In recent years, the defence industry has emerged as a significant sector in Estonia, and it has also become a clear focus for RASK. In addition to daily client work with Estonian and Ukrainian defence companies, I would highlight RASK's collaboration with **Darkstar**, a unique defence industry ecosystem in Estonia. As a legal mentor, I have participated in several Darkstar events that bring together defence companies with very diverse profiles. I would also emphasize my repeated trips to Ukraine. In July, I spent over a week in Kyiv at a Darkstar bootcamp, and in November, I participated in the same event for a second time.

► How would you describe the experience you gained from the Ukrainian bootcamps?

The bootcamps in Kyiv are highly unique and intensive events, primarily aimed at growth-stage companies whose solutions have the potential to reach actual use on the frontline. Approximately half of the participating companies have been from Ukraine, a quarter from Estonia, and the remainder from other parts of Europe, creating a very diverse and practical perspective. My role at the bootcamps has been to provide legal mentorship. The general knowledge needed by early-stage growth companies – covering company formation, transfer of intellectual property, and preparing for the first investment – is largely universal, regardless of the country of operation. There is also frequent interest in how to establish a company in Estonia or relocate operations to the EU.

► How important is it that these meetings take place in Ukraine specifically?

Being on the ground in Ukraine is extremely important because the trends shaping the sector – and influencing national defence and the defence industry for decades to come – are undeniably emerging there. This firsthand experience helps identify real needs. I see that a lawyer advising technology companies must find ways not to act as a brake while quickly clarifying what is essential versus optional. In practice, a bootcamp lasts five days and brings together nearly twenty companies, potential buyers – by which I mean specific Ukrainian army units – as well as investors and mentors from various

fields. The event also includes a testing day at a proving ground. Nowhere else is it possible to test solutions under such conditions, with such immediate and broad feedback, for systems capable of neutralizing the enemy.



Artur Sanglepp,
Attorney-at-Law
at **RASK**
Source: RASK

► To what extent has the experience from Ukraine been utilized in Estonia so far, and what are the obstacles?

The potential of skills and knowledge gained from Ukraine is far from fully realized. As usual, processes move slowly. For growth companies, a central question is what official channels exist for testing their products. If a solution in development has direct destructive potential, assembly for testing is possible only under a permit, which is a clear bottleneck. True, some steps have been taken and certain problems addressed, but there remains a need to analyse whether and how regulations could be made more flexible, while keeping in mind that various restrictions exist to protect our internal security. There is also continued uncertainty regarding handling sites: where and how we will produce, store, and manage ammunition and explosives.

The Ukrainian experience shows that in a high-risk environment, the most viable solutions are those that are decentralized, dispersed, and difficult to detect.

PROCUREMENT

Lithuania to procure a hundred CV90 MkIV infantry fighting vehicles from Sweden's BAE Systems Hägglunds

Lithuania this week ordered one hundred CV90 MkIV infantry fighting vehicles from Sweden's BAE Systems Hägglunds.

The decision was approved by the country's state defence council, with an emphasis on including production of technical components and maintenance services in Lithuania within later acquisition contracts.

CV90 infantry fighting vehicles are becoming increasingly widespread across Europe and could become the most common vehicle of their type in European armed forces by 2030.

The Mk IV is still under development, and scheduled to reach the prototype stage in 2028. The first CV90 Mk IVs could be delivered in 2029.

Six-nation joint procurement

The order is part of the joint procurement of six NATO Allies which includes Estonia, Finland, Sweden, Norway, and the Netherlands.

The six nations signed the Statement of Intent on CV90 infantry fighting vehicle procurement in June.

This was reinforced by a technical agreement concluded in Helsinki in late November, setting out collaboration principles, technical parameters and an action plan ahead of the main contract planned for early 2026.

The CV90 are planned to be delivered to Lithuania and other programme participants starting 2028.



CV90 MkIV infantry fighting vehicles from Sweden's BAE Systems Hägglunds.
Photo: BAE Systems Hägglunds

One argument in favor of the new CV90 model is that the manufacturer is Swedish.

"This is a next-generation platform," says **Marek Mardo**, the strategic category manager for air, sea and combat vehicles of the Estonian Center for Defence Investments (ECDI), adding: "The weapon itself is the same, the armor protection is the same. The turret and the weapon's placement in the turret is newer, and active protection systems and anti-tank systems have been added, but the platform is quite similar to the Mk III."

To date, there are 17 contracted variants of the CV90 used by 10 nations: Denmark, Estonia, Finland, Norway, Sweden, Switzerland, The Netherlands, Czechia, Slovakia and Ukraine.



CV90 Mark IV illustration. Source: BAE Systems Hägglunds

CV90 Mk IV in a nutshell

- ▶ This combat-proven Infantry Fighting Vehicle (IFV) combines improved battlefield speeds and handling with an upgraded Electronic Architecture to support future growth capabilities.
- ▶ It's the next step in the evolution of the CV90 concept. The CV90MkIV brings unrivalled technological capabilities and flexibility to today's complex battlefield.
- ▶ With a new engine, the MkIV boasts up to 1,000 horsepower and the latest upgraded X300 heavy-duty transmission. The Gross Vehicle Weight Rating is increased from 35 tonnes to 38 tonnes, offering users three tonnes of extra payload without a decrease in vehicle agility.

DRONES

Lithuanian state to buy locally made FPV drone warheads and anti-tank mines for more than €30m

Lithuanian state will procure Lithuanian-made FPV drone warheads from **LTMilTech UAB** for €9m and antitank mines from **Eksplisita UAB** for €22.8m.

"This decision is a significant step towards a stronger national defence industry. Development of local manufacturing capabilities is a proof of Lithuania's defence sector is mature and able to contribute in ensuring Lithuania's national security. It is also consistent with our aims to develop strategic sectors of ammunition and explosives production," said Lithuanian Minister of National Defence **Robertas Kaunas**.



All equipment will be made in Lithuania.

LTMilTech wins a €9m contract

The contract worth €9m was signed with **LTMilTech UAB** on the acquisition of FPV drone warheads, more specifically, fragment, lens and cumulative warheads.

Commenting the procurement deal, LTMilTech posted in LinkedIn:

"We're proud to share that the Lithuanian Ministry of National Defence has signed a contract with LTMilTech for the procurement of FPV drone warheads. FPV drone warheads are becoming an increasingly important capability. Compared to guided missiles or manned aircraft, unmanned munitions are typically far more cost-effective, while still delivering a comparable battlefield effect. Just as significantly, they can reduce personnel risk by enabling precise targeting without exposing operators to direct danger."



Development of local manufacturing capabilities is a proof of Lithuania's defence sector is mature and able to contribute in ensuring Lithuania's national security."
Defence Minister Robertas Kaunas

DEFENCE INDUSTRY**Defence Committee chair: Estonian state should learn from Latvia and Lithuania on how to increase its role in national defence sector**

Estonian state has fallen significantly behind neighbors Latvia and Lithuania in the role of the state in the national defence sector, according to Reserve Lt. Col **Leo Kunnas** who is chairman of the Estonian parliament's defence committee.

In an interview to ERR, Kunnas said that in the defence industry of Latvia and Lithuania the state plays a much larger role than in Estonia.

As an example, Kunnas cited German arms manufacturer **Rheinmetall** building factories in both Lithuania and Latvia, but not in Estonia.

"Where are our partners, the major companies from the European countries?" Kunnas inquired.

"We are a part of Europe, the EU — it is vital that we be able to bring major manufacturers here who could establish production in such a way that it would remain operational even during wartime," he went on.

The Defence Committee is in talks with the Estonian Ministry of Defence on how to involve the state more in Estonia's defence industry.

This discussion has included looking at how the defence sector could continue to function during an actual wartime or crisis situation.

At a meeting last week, committee members pointed out that the state should take on a larger role in the defence industry sector, currently largely in the private sector's hands.



Leo Kunnas is urging the Estonian state to play a much stronger role in the national defence industry sector.

While Ukraine lost a lot of defence industry infrastructure early on in the invasion, it still has been able to rebuild its defence industry while some of the more critical production facilities are located underground to protect them from enemy attacks.

Covering EDF needs locally

Kunnas says that the defence industry should cover all needs of the Estonian Defence Forces (EDF) locally.

He added that the defence industry sector needs to pull itself together as defence spending is growing in both NATO and the EU as a percentage of GDP.

"Our defence spending may be over 5 percent, but it is clear that we do not have very long-term sustainability if we are unable to produce ourselves what is needed for our military defence," Kunnas said, adding: "Such that as large a share as possible of the money we put into defence spending should remain in the country."

This works both ways according to Kunnas, both in boosting domestic output and in attracting foreign defence industry investment.

MoD top official: we differ, but we are not wrong either

Siim Sukles, Deputy Secretary General for Defence Industry and Innovation of the Estonian Ministry of Defence, agrees that the state has almost no ownership in defence industry companies.

The only exception is Hexest Materials, a manufacturer of explosives, that was founded by the state and in which the state will keep a 51 percent holding, Sukles said.

"As for other defence industry companies, it is true that the state has no ownership stake in any of them," he said.

"I think this is clearly where we differ from Finland, Latvia and Lithuania — but it does not seem to me that this is wrong, either. There are currently no obstructions or market barriers that would require us to enter this business or market using state-owned companies," Sukles said.



Siim Sukles, Deputy Secretary General of the Estonian MoD.

The Estonian defence sector is small and the product range is quite narrow, Sukles said, adding that this means that to ensure capabilities, a great deal has to be procured from abroad in any case. This includes long-range missiles and multiple rocket launchers (MLRS) systems.



Chonmoo rocket launcher used in exercise.
Source: SCANPIX

South Korea's Hanwha to invest in Estonian defence industry as Estonia orders Chunmoo rocket launchers

Estonia announced this week that it will purchase six Chunmoo multiple rocket launchers from South Korean defence company Hanwha for €290m.

As part of the deal, Hanwha will also invest in Estonia's defence sector industry, which is expected to bring back 40m to 60m to Estonia over the next ten years.

Estonia has for some time been inviting South Korean defence industry companies to establish manufacturing in Estonia. The two countries have also signed a bilateral defence cooperation contract.

This year representatives of Hanwha have met with the representatives of the **Estonian Centre of Defence Investments (RKIK)** on the topic "Chonmoo, capability developments of Redback Infantry Fighting Vehicle, industrial participation, possibilities to produce ammunition in Estonia."

FIGURE

€40-60m

The amount that Estonia hopes to earn in 10 years from the investment by Hanwha in Estonia's defence industry

Nordic Defence and Security Cluster NORDSEC to join Supply, Security & Defence Expo 2026 as Executive Partner

Rooted in Norway, NORDSEC operates with a strong Nordic and Baltic outlook, reflecting a rapidly changing geopolitical landscape where cooperation, resilience and preparedness are more important than ever.



NORDSEC is committed to building stronger connections, more resilient supply chains and a shared foundation for sustainable growth and security across the Nordic-Baltic region.

Below are logos of some of SSD2026 exhibitors



We at NORDSEC are always looking for cooperation with clusters and ecosystems."

► For more information contact
Tevje R. Eggan (tevje@fi-nor.no) or
visit www.nordsec-cluster.no



In September, EDTH held its shortest ' (6 hrs) hackathon in the framework of the Estonian Defence Week.

European Defense Tech Hackathon to be held in Tallinn on Feb 27 – March 1

Get inspired by the challenges or feel free to bring your own project. You'll get feedback from folks who have been on the frontline to ensure you're solving real problems.



INFRASTRUCTURE

Construction at German brigade's training area in Lithuania advances ahead of schedule

Construction work at the Rūdninkai military training area in Lithuania is progressing significantly faster than planned, with the first stage of the project nearing structural completion nearly a year ahead of schedule, **Almantas Čebanauskas**, head of **EIKA Construction**, said.

"Our entire team lives by this project, believes in it and is making every effort to complete it 10 months earlier than planned," Čebanauskas said. "We plan to finish this project by the end of next year."

A wreath was raised Wednesday atop the future headquarters building of the German brigade to be stationed at the site, marking a traditional milestone in Lithuanian construction. German brigade commander **Christoph Huber**, who inspected the site, said the pace of work exceeded his expectations, reported LRT.

"I am very grateful to Lithuania for doing this so quickly. We see very significant progress in the construction of this military town," he said.

"This site is very important to us because it will be our home – my home and the home of my soldiers. We hope that by the end of 2027, about 3,800 soldiers will already be here."



Construction work at the Rūdninkai military training area is progressing significantly faster than planned.

Source: R. Riabovas / BNS

INVESTMENT

Nefab Baltics donates innovative customised packaging equipment to Estonian Defence League

Nefab Baltics, provider of industrial packaging, this week donated innovative packaging solutions specifically developed for storing protective and security equipment to the Defence League's Tallinn district and its territorial defense battalion.

Thanks to the donation, the Defence League will be able to test several professional, internationally-standardized equipment storage solutions.

The prototypes were developed in collaboration with the Defence League, and took more than five months to develop.

A total of 50 different equipment storage solutions were handed over to the Tallinn district, including both water-proof plastic cases and durable plywood boxes.

The solutions are designed for the safe transport and storage of, among other things, communication devices, weapons, technical equipment, and special gear, and are created with the specific needs of the defense sector in mind, such as noiseless handling, discreet appearance, and durability in challenging conditions.

The development of the packaging began five months ago, production lasted several weeks, and the latest solutions were completed just before the holidays.



NEFAB
SAVING RESOURCES

Jana Salm, head of Nefab Baltics, noted that this marks the start of a long-term collaboration.

"National defense is a joint effort, requiring the input of all parts of society. Collaboration is important to us because it brings together the competence of the company and the real needs of national defenders.

At the same time, the motivation of Defence League members increases, and companies receive valuable feedback on the functionality of their solutions in real-world conditions," Salm said, adding that the company's aim is to furnish other Defence League districts in Estonia with similar solutions.



National defence is a joint effort to which all parties of society must contribute."

Jana Salm, head of Nefab Baltics

According to **Rene Ilves**, company commander of the territorial defense battalion, every detail is important in defense operations.

"We are pleased to be able to test professional solutions for equipment storage and transport.

About Nefab Baltic

- ▶ Nefab Baltic is part of the international Nefab Group, whose parent company is based in Sweden.
- ▶ Nefab's factory in Estonia produces solutions from plywood, wood, corrugated cardboard, and foam plastic, and tests packaging solutions for the transport of dangerous goods at its local testing facility.
- ▶ Nefab employs 220 people in Estonia, several of whom are Defence League members or reservists.

EASTERN FLANK SUMMIT Prime ministers of eight Eastern Flank countries urge EU to make their security a priority

This week the prime ministers of Eastern Flank countries Poland, Finland, Sweden, Estonia, Latvia, Lithuania, Romania, and Bulgaria met in Helsinki for a one-day **Eastern Flank Summit** to discuss regional security.

The participants declared that all of Europe must take responsibility for NATO's Eastern Flank and defend it quickly, decisively, and with leadership responsibility.

The heads of government also stressed that operations on the eastern flank, such as Eastern Sentry and Baltic Sentry, as well as airspace patrols over the Baltic states, need to be strengthened.

One obvious tool is a strong defense industry, which the countries at the meeting have developed and will continue to develop. However, the entire European defense industry needs to achieve technological independence.

Therefore, the prime ministers are demanding swift action both in EU funding and in mobilizing resources from the EU and the public sector. If necessary, the influence of the European Investment Bank should also be used for this purpose.

"We are also sending a clear message to Brussels that we want to take responsibility for defending the eastern flank, and we want to do this in good cooperation with the EU and NATO," said Finnish PM **Petteri Orpo**.



PMs of NATO and EU Eastern Flank countries at a press conference in Helsinki. Photo: Kimmo Brandt EPA

Michal: we are the first line of defence for NATO and EU

Estonian Prime Minister **Kristen Michal** said the region is "not waiting around" and is "working hard" to protect the eastern flank and the EU.

"Europe's future is closely tied to Ukraine. If Russia is not strategically defeated in Ukraine, it will become bolder," he told the assembled media. Michal also urged the EU to use Russia's frozen assets to support Ukraine.

The prime minister stressed that Europe needs to do more for its own defense: "This must include [seeing] the eastern border as a priority. It is the first line of defense for the whole EU and NATO."

"The EU must take responsibility and speed up support," he continued. "We have a good plan for the Eastern Flank Watch. The focus is on air and drone defense, stronger situational awareness and the ability to stop the enemy at the border."

Latvia's Prime Minister **Evika Silina** said the eight countries already work together, but now they will seek to "use different EU instruments" to advance their cause.

"We know the methods generally used by the FSB, how they reach those who actually carry out acts of sabotage. It's not like the old films where spies were used for such acts. Usually, there are several people involved who have never seen the Russian organizers," said Silina, adding: "A strong eastern flank means a safer Europe, and our unity is our strength and best defense."

Those present also acknowledged that protection and surveillance of the EU's eastern border cannot rely on the capabilities of individual countries alone; instead, a comprehensive framework and credible capacities are required to cope under various conditions.

"This means joint projects, it means coordination," added Michal.

Eastern Flank Watch initiative

The eight countries promised to strengthen cooperation and urge the EU to see the region as a priority. Finland and Poland have agreed to lead the Eastern Flank Watch initiative, designed to strengthen the defense capabilities of frontier countries. The countries will work together on several levels, including their militaries, ministries of defense, the European Commission and with NATO.



Our priorities are air defense, drone capabilities, land forces and very good cooperation."
Finnish PM Petteri Orpo

NATO DIANA

Four Baltic defence tech companies included in NATO DIANA 2026 Cohort

NATO DIANA has announced its largest-ever cohort: 150 innovators selected across ten areas for 2026 Challenge Programme.

The list includes one company from Latvia and three companies from Estonia.

The Latvian company **Deep Space Energy** specializes in resilient radioisotope power for satellite manoeuvring and non-kinetic threat defence.

Estonian innovators include **Spacedrip** (Autonomous containerised freshwater logistics and water-reuse system for extreme environments), **C2GRID** (Fusing battlefield data with AI for real-time 3D awareness and accelerated operational decisions) and **LSMedical** (precision-engineered magnets deliver superior performance with rare earth-free technology).



NATO DIANA connects companies with military end-users, mentors, and investors, accelerating the development, validation, and adoption of their innovations to help NATO tackle urgent operational challenges and maintain a decisive edge in defence technology.