

Covering the defence industry of **Estonia, Latvia, Lithuania** and the wider **Baltic Sea region** since June 2024

Baltic Defence Weekly

No. 62 | 22– 28 December 2025 | www.balticdefence.ee | For enquiries please call +372 50 24543



TOP NEWS OF 2025

JANUARY

Baltic defence industry out in force at SecD-Day in Helsinki

FEBRUARY

Baltic states decouple from the Russian-Belarus energy system

MAY

Riga hosts Drone Summit 2025

The first Supply, Security & Defence Expo held in Tallinn.

JUNE

History made as Germany starts first permanent stationing of troops abroad since WWII

JULY

Estonia says it will spend over €10 billion on defense in 2026-2029

SEPTEMBER

Tallinn hosts Estonian Defence Week, the largest defence industry event in the Baltics

NOVEMBER

Rheinmetall breaks ground on ammunition factory in Lithuania

DECEMBER

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

German company to build a €50m plant in Lithuania for assembly of Leopard tanks



Wishing you all a very Happy New Year 2026!

In this year-end edition of Baltic Defence Weekly we look back to the very eventful year 2025 by wrapping up the year's top news and developments in the defence domain in the Baltic states, Europe and elsewhere.

Our warmest wishes for the new year go to all our current and future subscribers – may the new year 2026 bring you truth, hope, progress, and shared stories that will strengthen our community and our collective resilience.

FROM THE EDITOR

Baltic Defence Weekly looks back to 2025

Dear subscribers,
As we send off 2025 and prepare for what is ahead, I would like to thank you for being a very valued part of the Baltic Defence Weekly ecosystem.

Your trust, feedback, and loyalty have shaped our newsletter into a stronger voice for the Baltic and global defence community.

We are grateful for every subscriber and look forward to growing together in the years ahead, continuing to inform, inspire, and serve you.

Toomas Hõbemägi,
founder and editor



Defence and security news and analysis from Estonia, Latvia and Lithuania

BALTIC DEFENCE WEEKLY

No. 18 | 3 - 9 February 2025 | Published by Mikko Mäkelä - For enquiries call +352 60 20402

QUOTE OF THE WEEK
"There was truly dangerous, serious, disconcerting threat, and something that was connected to the Russian military system," says Kusti Salm.

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Several defence tech companies to be worth at least a billion. Page 2

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Baltic states are unicorn factory. Page 2



Leaders of Latvia, Lithuania, Estonia, Poland and the European Commission at the Baltic states summit in Brussels.

Baltic states take a major step in increasing energy security

The Baltic states have taken a major step in increasing energy security by signing the Energy Community Treaty, which will allow them to join the EU's internal energy market.

The Energy Community Treaty is a legal framework that will allow the Baltic states to join the EU's internal energy market, which will help them to increase their energy security and reduce their dependence on Russia.

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No. 20 | 17 - 23 February 2025 | Published by Mikko Mäkelä - For enquiries call +352 60 20402

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3 - 9 FEBRUARY (# 18)

TOP STORY: Baltic states take a major step in increasing energy security

- ▶ Several Estonian defence tech companies to be worth at least a billion.
- ▶ US Army training Estonian HIMARS unit.
- ▶ **Helsing and Mistral** announce strategic partnership in defence AI.
- ▶ **Frankenburg Technologies** expands to Lithuania, appoints former deputy minister as CEO.
- ▶ **TalTech and Estonian Defence Resources Agency** to jointly develop defence tech
- ▶ One of the world's largest defence expos attracts 20+ exhibitors from Baltic defence tech companies. Baltic states are unicorn factory.

10 - 16 FEBRUARY (# 19)

TOP STORY: How will the new European policy of U.S. leaders affect Baltic states?

- ▶ Baltic, Nordic leaders: we stand firmly behind Ukraine.
- ▶ Direct military attack against Estonia in 2025 is unlikely - spymaster.
- ▶ Brussels prepares to relax Maastricht criteria.
- ▶ Direct military attack unlikely in 2025 - spy agency.
- ▶ **Kusti Salm**: no more room to wiggle nor margin for error.
- ▶ Lithuania celebrates independence day.
- ▶ **Estonian Defence Week** to take place in September 22-26.
- ▶ **Wayren CEO**: things happen fast in Ukraine.
- ▶ **EFIS**: Russia's drone development is a threat.

17 - 22 FEBRUARY (# 20)

TOP STORY: Estonia celebrates Independence Day on February 24

- ▶ Lithuanian deftech out in force at Enforce Tac
- ▶ Preparations for Supply Security Defence Expo 2025 Tallinn are well underway.
- ▶ IDEX 2025 in Abu Dhabi highlighted the power of Estonian defence tech innovation.
- ▶ Milrem Robotics to collaborate with Hanwha Aerospace.
- ▶ Milrem Robotics starts cooperation with Thales, EM&E Group.
- ▶ DefSecIntel Solutions showed combat-proven solutions.
- ▶ Civil Shield Forum 2025 to be held in Vilnius March 10.
- ▶ Lithuania to bring state-owned defence industry companies under one holding.
- ▶ Baltic officials: no indication of US troop withdrawal.

23 FEBRUARY - 1 MARCH (# 21)

TOP STORY: Lesson from the White House meeting of Donald Trump and Volodymyr Zelenskyy: it's time to act and rearm!

- ▶ Editorial: the week when the masks came off
- ▶ Free world needs a new leader.
- ▶ Baltic leaders "not amused" for being excluded from Ukraine summit in London.
- ▶ Estonian defence tech companies revive idea of a **Baltic Drone Wall**.
- ▶ General Martin Herem: Estonia is now a bargaining chip.
- ▶ Latvia's defence industries are flexing their muscles.
- ▶ Latvia to co-develop C-UAV solutions with Latvian, Estonian deftech companies.

- ▶ Estonia falling behind in building its section of the Baltic Defence Line.
- ▶ Estonian state to set up a company to produce **RDX**.
- ▶ Sunken US armoured vehicle pulled from the bog in Lithuania
- ▶ Only two weeks left to secure exhibition stand at the **Tallinn Supply, Security & Defence Expo**
- ▶ Why is the town of Narva unsuitable for the West as a producer of military equipment?
- ▶ Members of **MilTech Association** present their products to Ukraine officials.
- ▶ **Darkstar** kickstarts defence VC fund ReArm Europe.
- ▶ Finnish president **Alexander Stubb** uses golf diplomacy with Donald Trump.

Defence industry news and analysis from Estonia, Latvia, Lithuania and other Baltic Sea countries

BALTIC DEFENCE WEEKLY

No. 58 | 31 March - 6 April 2025 | www.balticdefence.eu | For enquiries call +372 50 24043

Office: Latvia, 4th floor, Tēvijas laiks
Phone: +372 50 24043

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MoD awards Pärnu county as most suitable location for concrete bunkers. Page 2

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FOCUS ON EASTERN BORDER

Estonia receives final delivery of thousands of Dragon's Teeth
Estonia has received the final delivery of thousands of Dragon's Teeth. The concrete bunkers are 1.5m high and 1.5m wide. They are designed to protect the Estonian coast from Russian attacks. Page 1

EU defence ministers in Warsaw: take advantage of opportunities
Ministers attending the Warsaw meeting of EU defence ministers have agreed on April 3 and 4 to agree that EU countries can take advantage of opportunities in the defence industry. Page 2

President of Poland: we must develop our own defence industry
President of Poland, Andrzej Duda, stressed the importance of developing our own defence industry. He said that Poland must be able to defend itself. Page 3

RAIL BALTIMA
In wartime, Rail Baltica could be used to evacuate 100,000 people a day. Page 4

FINLAND
Finnish defence exports may reach EUR 10 bln by 2030. Page 5

1 - 6 APRIL (# 25)

TOP STORY: EU Defence ministers in Warsaw: take advantage of opportunities!

- **Bundeswehr** to practice defending Baltic states from Russian attack.
- Estonia receives final delivery of thousands of Dragon's Teeth
- MoD selects Pärnu county as most suitable location.
- **Pevkur**: Baltic states and Poland must work together in securing borders. Estonia to procure 600 concrete bunkers.
- **Metrosert** to become R&D centre on drone tech.
- President of Poland to arrive in Estonia on a state visit.
- Lithuania may extend right to start building major plants without a permit.
- Defence industry is Estonia's big opportunity.

Defence industry news and analysis from Estonia, Latvia, Lithuania and other Baltic Sea countries

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7- 13 APRIL (# 26)

TOP STORY: President of Poland: we must develop our own defence industry

- Milrem Robotics CEO: Estonia is overregulated.
- This is our test site - Estonian defence firms in Ukraine
- Estonian-made drone crashes in African hotspot.
- Finnish fighters: Finland is unprepared for modern war.
- Keldo: we all face similar challenges. Latvia to showcase in CANSEC 2025.
- Estonian Navy detains Russian shadow fleet tanker.
- In wartime, Rail Baltica could be used to evacuate 100,000 people a day.
- Finnish defence exports may reach EUR 10 bln by 2030.

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Estonia is kickstarting defence VC fund ReArm Europe. Page 4

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BAE Systems announces major breakthrough in munitions production. Page 6

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Estonia to buy counter-drone radars from Hungarian company Pro Patria. Page 7

FOCUS ON EASTERN BORDER

Estonia to host the largest military exercise of its history
Estonia is preparing to host the largest international military exercise in its history. The exercise will be held in May 2025. It is organized by the Estonian Defence Forces and will involve more than 10,000 troops. In addition, more than 1,000 additional allied troops will participate in the exercise. Page 1

14 - 20 APRIL (# 27)

TOP STORY: Estonia to host the largest military exercise of its history

- Estonian **DefenceTech Meetup** focused on procurements.
- Countdown to **Supply, Security & Defence Expo** begins
- Latvian company **VR Cars** plans to build military light tactical vehicles.
- Estonian weighs acquiring anti-ballistic missile systems.
- Darkstar is kickstarting defence VC fund ReArm Europe.
- Lithuania, Estonia, denied EU funding for drone wall.
- BAE Systems announces major breakthrough in munitions production.
- Estonia to buy counter-drone radars from Hungarian company **Pro Patria**.

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FOCUS ON EASTERN BORDER

Karlis invites Trump to visit Estonia
Estonian President Karis has invited Donald Trump to visit Estonia. The invitation was issued on April 14. Karis said that he would like to meet with Trump in the near future. Page 1

Countdown to Supply, Security & Defence Expo
The countdown to the Supply, Security & Defence Expo is on. The event will be held in May 2025. It is organized by the Estonian Defence Forces and will involve more than 10,000 troops. In addition, more than 1,000 additional allied troops will participate in the exercise. Page 2

21 - 27 APRIL (# 28)

TOP STORY: Estonian president invites Donald Trump to visit Estonia

- Polish Minister of Foreign Affairs **Radosław Sikorski** to visit Supply, Security & Defence Expo.
- Estonia to raise defence spending to 4.5 percent of GDP.
- **Supply Security & Defence Expo** to start in three weeks
- Latvia's munitions factory may start work in the second half of 2026.
- Estonia to establish explosives factory in the coming months.
- Baltic and Nordic countries could jointly manufacture cruise missiles.
- Estonia opens its first UAV training centre.
- **Estonian Defence Forces** to build a new base in Narva.

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Plans to build the Baltic Defense Line fortifying the eastern borders of Poland

- ▶ Nordic defence executive: cooperation lacking in both Europe and Baltic states
- ▶ Latvia to buy 18 wheeled artillery systems Archer
- ▶ This year's Victory Day Parade held in Pärnu
- ▶ Swedish company acquires the largest private ammunition manufacturer in Baltics
- ▶ Reservists' Week 2025 celebrated
- ▶ Ten companies from five different countries shortlisted for defence industrial park
- ▶ Latvia eyes possible production of anti-tank Spike missiles
- ▶ Who wants to defend Estonia?
- ▶ NATO summit agreement in place, but Spain hesitating

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BALTIC DEFENCE WEEKLY

No. 40 | 21-27 July 2025 | www.balticdefence.eu | For enquiries call Thomas Hildebrand at +372 50 24543

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- DEFENCE:** Lithuania to allocate EUR 30 million to Ukraine for Patriot
- DEFENCE:** Latvian army to buy light tactical vehicles from local VR Cars
- DEFENCE:** Latvian company wins EUR 24 million international Drone Coalition procurement
- DEFENCE:** Front42 - first in Baltic states to manufacture ballistic protective plates
- DEFENCE:** Lithuania to equip each unit of its Armed Forces with drones – Chief of Defence
- DEFENCE:** Russia's new GPS jammer near Estonia's eastern border affecting drones
- DEFENCE:** Baltic Workboats sets up separate entity for military projects



Baltic defence ministers, Hegseth meet in Washington to discuss U.S. military presence in Baltic states

Defence ministers of Estonia, Latvia, Lithuania, the United States and Sweden met in Washington to discuss the presence of the US military presence in the Baltic states and the role of NATO's Baltic Air Policing mission. The Estonian, Latvian and Lithuanian defence ministers, accompanied by the US Secretary of Defence Pete Hegseth, met in Washington to discuss the presence of the US military presence in the Baltic states and the role of NATO's Baltic Air Policing mission. The Estonian, Latvian and Lithuanian defence ministers, accompanied by the US Secretary of Defence Pete Hegseth, met in Washington to discuss the presence of the US military presence in the Baltic states and the role of NATO's Baltic Air Policing mission. The Estonian, Latvian and Lithuanian defence ministers, accompanied by the US Secretary of Defence Pete Hegseth, met in Washington to discuss the presence of the US military presence in the Baltic states and the role of NATO's Baltic Air Policing mission.

21 - 27 JULY (# 40)

TOP STORY: Baltic defence ministers to Pete Hegseth: boots on the ground sends a message to Kremlin

- ▶ Lithuania to allocate EUR 30 million to Ukraine for Patriot
- ▶ Latvian army to buy light tactical vehicles from local VR Cars
- ▶ Latvian company wins EUR 24 million international Drone Coalition procurement
- ▶ Front42 - first in Baltic states to manufacture ballistic protective plates
- ▶ Lithuania to equip each unit of its Armed Forces with drones – Chief of Defence
- ▶ Russia's new GPS jammer near Estonia's eastern border affecting drones
- ▶ Baltic Workboats sets up separate entity for military projects

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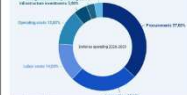
BALTIC DEFENCE WEEKLY

No. 41 | 28 July - 3 August 2025 | www.balticdefence.eu | For enquiries call Thomas Hildebrand at +372 50 24543

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- DEFENCE:** Rheinmetall to deliver infantry ammunition to Lithuania and Estonia for around €33 million
- DEFENCE:** Latvia has two drone makers in world's top 100 ranking
- DEFENCE:** Lithuanian military recovers mysterious drone 100km from Belarus border
- DEFENCE:** NATO may station German-Dutch corps in Estonia
- DEFENCE:** Turnover of Estonian deep tech startups up by 20 percent in a year
- DEFENCE:** Business Plan 2026 to discuss future of the Estonian defence industry
- DEFENCE:** EDIA to hold webinar on Singapore and Southeast Asia
- DEFENCE:** CIO of NATO confirmed as speaker at SSD 2026



Estonia will spend €10 billion on defence between 2026-2029

The Estonian government has announced a major defence budget increase for the period 2026-2029. The budget is set at €10 billion, which is a significant increase from the current level. The budget will be used to modernise the Estonian defence forces and to strengthen the country's defence capabilities. The budget will be used to modernise the Estonian defence forces and to strengthen the country's defence capabilities. The budget will be used to modernise the Estonian defence forces and to strengthen the country's defence capabilities. The budget will be used to modernise the Estonian defence forces and to strengthen the country's defence capabilities.

28 JULY - 3 AUGUST (# 41)

TOP STORY: Estonia to spend over €10 billion on defence in 2026-2029

- ▶ Rheinmetall to deliver infantry ammunition to Lithuania and Estonia for around €33 million
- ▶ Latvia has two drone makers in world's top 100 ranking
- ▶ Lithuanian military recovers mysterious drone 100km from Belarus border
- ▶ NATO may station German-Dutch corps in Estonia
- ▶ Turnover of Estonian deep tech startups up by 20 percent in a year
- ▶ Business Plan 2026 to discuss future of the Estonian defence industry
- ▶ EDIA to hold webinar on Singapore and Southeast Asia
- ▶ CIO of NATO confirmed as speaker at SSD 2026

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BALTIC DEFENCE WEEKLY

No. 42 | 4 - 10 August 2025 | www.balticdefence.eu | For enquiries call Thomas Hildebrand at +372 50 24543

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- DEFENCE:** Frankenburg Technologies joins UK's leading aerospace & defence trade body
- DEFENCE:** Drone expert: without Chinese-made components, electronics used in drones will be very expensive
- DEFENCE:** Estonia to borrow up to €3.6 billion in defence loans
- DEFENCE:** Northrop Grumman, Nammo partner with Lithuania to expand ammo production
- DEFENCE:** Estonian producer of prefab houses wins €2m contract to build an apartment house in Ukraine
- DEFENCE:** Estonia's flagship defence manufacturer prepares for explosive growth after loss of €10.7m in 2024



Baltic states set to borrow billions from Brussels to boost their defence

The Baltic states are set to borrow billions from the European Union to boost their defence capabilities. The borrowing is part of a larger initiative to strengthen the defence of the Baltic region. The borrowing is part of a larger initiative to strengthen the defence of the Baltic region. The borrowing is part of a larger initiative to strengthen the defence of the Baltic region. The borrowing is part of a larger initiative to strengthen the defence of the Baltic region.

4 - 10 AUGUST (# 42)

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- ▶ Embraer signs MoUs with eight Lithuanian industrial partners
- ▶ Frankenburg Technologies joins UK's leading aerospace & defence trade body
- ▶ Drone expert: without Chinese-made components, electronics used in drones will be very expensive
- ▶ Estonia to borrow up to €3.6 billion in defence loans
- ▶ Northrop Grumman, Nammo partner with Lithuania to expand ammo production
- ▶ Estonian producer of prefab houses wins €2m contract to build an apartment house in Ukraine
- ▶ Estonia's flagship defence manufacturer prepares for explosive growth after loss of €10.7m in 2024

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BALTIC DEFENCE WEEKLY

No. 43 | 11 - 17 August 2025 | www.balticdefence.eu | For enquiries call Thomas Hildebrand at +372 50 24543

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- DEFENCE:** Lithuania to invest about EUR 4 billion in infrastructure over four years
- DEFENCE:** Latvia approves sale of Ammunition to Astor Group from Sweden
- DEFENCE:** Lithuania buys anti-tank mines, artillery shells to boost defence
- DEFENCE:** Milworks executive: change of ownership enables us to respond more flexibly to needs of our defence forces
- DEFENCE:** Lithuania allocates €461m for advance payment on German-made battle tanks



Milrem Robotics and Frontline integrate Themis UGV and BURIA remote weapon station into a Unified Combat Support System

Milrem Robotics and Frontline have announced a major partnership to integrate their Themis UGV and BURIA remote weapon station into a Unified Combat Support System. The partnership is a significant step towards the development of a more integrated and effective defence system. The partnership is a significant step towards the development of a more integrated and effective defence system. The partnership is a significant step towards the development of a more integrated and effective defence system. The partnership is a significant step towards the development of a more integrated and effective defence system.

11 - 17 AUGUST (# 43)

TOP STORY: Milrem Robotics, Frontline team up on Themis

- ▶ Baltic Defence Weekly to attend DALO
- ▶ EU member states initially requesting at least €127 billion
- ▶ Ukraine's Frontline integrates its BURIA remote weapon station on Milrem Robotics' THeMIS UGV
- ▶ Lithuania to invest about EUR 4 billion in infrastructure over four years
- ▶ Latvia approves sale of Ammunition to Astor Group from Sweden
- ▶ Lithuania buys anti-tank mines, artillery shells to boost defence
- ▶ Milworks executive: change of ownership enables us to respond more flexibly to needs of our defence forces
- ▶ Lithuania allocates €461m for advance payment on German-made battle tanks

BALTIM DEFENCE WEEKLY

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Military presence in Eastern Europe
underlines its intentions to defend
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Major US force remains as second
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EU member states agree to strengthen
border controls together with Poland
and Lithuania

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POLAND & ESTONIA
Poland and Estonia agree to
strengthen border controls in Eastern
Europe as a whole and EU

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EU member states agree to
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Baltic Defence

(Only Law, Not Politics)

10th September 2008

10th September 2008

FOCUS ON EASTERN BORDER

EU member states agree to strengthen border controls in Eastern Europe as a whole and EU

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EU defence ministers in Warsaw: take advantage of opportunities

Members attending the Warsaw meeting of EU defence ministers last night agreed to a statement that EU countries can now do more to strengthen their defence capabilities.

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Estonia receives final delivery of thousands of Dragon's Teeth

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18 – 24 AUGUST (# 44)

TOP STORY: EU defence ministers in Warsaw: take advantage of opportunities

- ▶ Lithuania seeks to start assembling next-gen CV90 infantry fighting vehicles
- ▶ Estonian Defence Forces seek program manager to develop Baltic Defence Zone
- ▶ Estonia to establish not one, but two defence industry parks
- ▶ Airplane full of Russian tourists lands in Tallinn after St. Petersburg airport closed down due to Ukrainian drone attack
- ▶ Lithuania closes part of airspace near Belarus ahead of Zapad
- ▶ A drone crashes on Russian territory six kilometers from Estonian border at Lake Peipus
- ▶ Estonia and Japan join forces in Ukraine to build housing for IDPs

[illegible]

25 AUGUST – 31 AUGUST (# 45)

TOP STORY: Poland, Baltic states leading in defence spending as share of GDP

- ▶ European Commission President, EU Defence Commissioner kick off their frontline member states' tour in Latvia
- ▶ Remains of crashed, exploded Ukrainian combat drone found in Estonia
- ▶ Baltic defence industry to be prominently visible at 33rd International Defence Industry Exhibition MSPO 2025
- ▶ Lithuania, Ukraine plan joint weapons production
- ▶ Latvia, Estonia plan cross-border cooperation in the deep tech sector
- ▶ Canadian group to start production of strategically important permanent magnets in Narva
- ▶ NATO's eastern flank looks at bogs as a means to stop Russian tank

Covering the defense industry, electronics, Latvia, Lithuania and the wider Baltic Sea region **BALTIC DEFENCE WEEKLY**

Vol. 1, No. 1 - September 2005 some information on... For more information and to subscribe visit us at www.bdw1.com

IN THIS ISSUE

EDITORIAL
 Welcome to the first issue of Baltic Defence Weekly. We are pleased to have you as a subscriber and hope you will find the information in this issue useful. We will be publishing news, analysis and commentary on the defense industry, electronics, Latvia, Lithuania and the wider Baltic Sea region. We will also be publishing information on the defense industry in the Baltic states and the wider region.

NEWS
 Latvia's defense industry is expected to receive a significant boost from the EU. The EU has agreed to provide Latvia with a grant of up to 10 million euros to help it develop its defense industry. This grant will be used to fund a number of projects, including the development of a new defense industry park in Riga. The park will be a hub for defense industry companies and will provide a range of services, including research and development, production and distribution. The park is expected to create a number of new jobs and to attract a number of new companies to the region.

OPINION
 The Baltic states are facing a number of challenges in the defense industry. One of the main challenges is the need to modernize their defense forces. The Baltic states have inherited a large number of Soviet-era weapons and equipment, which are now outdated and unreliable. They need to replace these with modern weapons and equipment. Another challenge is the need to develop a strong defense industry. The Baltic states have a long history of being a net importer of defense equipment. They need to develop a strong defense industry to be able to produce their own defense equipment. This will help them to reduce their dependence on foreign suppliers and to save money.

EDITORIAL
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Baltic Defence Weekly

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Cost annuities go? declining to use fast-track method for expanding Nurtupia training area

The Ministry of Defense has announced that it will not use the fast-track method for expanding the Nurtupia training area. The fast-track method is a simplified procedure for obtaining land for military purposes. It allows the Ministry of Defense to bypass the usual planning and zoning process. However, the Ministry of Defense has decided that this method is not appropriate for the Nurtupia training area. The area is a sensitive environment and the fast-track method could lead to the loss of valuable natural resources. The Ministry of Defense will instead use the usual planning and zoning process to expand the training area. This will ensure that the area is developed in a sustainable way and that the natural resources are protected.

2005 defense expenditure in the Baltic

The following table shows the defense expenditure in the Baltic states for the year 2005. The data is expressed in millions of euros.

Country	2005	2004
Latvia	1.2	1.1
Lithuania	1.5	1.4
Estonia	0.8	0.7

Source: Ministry of Defense, Baltic states

Pentagon moves to cut security funding for the Baltic states

The Pentagon has announced that it will cut security funding for the Baltic states. The funding is part of the US military's global security assistance program. It is used to provide the Baltic states with military equipment, training and other security assistance. The Pentagon has decided that the funding should be reduced by 10% for the year 2006. This decision has caused concern in the Baltic states. They argue that the funding is essential for their security and that a reduction would weaken their defense forces. The Pentagon has responded by saying that the funding is being reduced as part of a broader effort to reduce US military spending. It has also said that the funding will be used to provide the Baltic states with other security assistance, such as training and equipment. The Baltic states have agreed to accept the reduction in funding, but they have also asked the Pentagon to provide them with other security assistance to make up for the loss of funding.

1 - 7 SEPTEMBER (# 46)

TOP STORY: Baltic states to US: any cuts to US military support to the Baltic states only weaken credibility of NATO's efforts at deterrence

- ▶ Baltic defence industry made its mark at the largest defence expo in Central and Eastern Europe
 - ▶ Latvia launches Autonomous Systems Competence Center in Riga
 - ▶ Milrem Robotics to deliver a record number of THeMIS UGVs to Ukraine
 - ▶ SensusQ, Nortal partner with Hanwha Aerospace to co-develop advanced Battlefield Management System
 - ▶ Lithuania, Finland boost cooperation in defence
 - ▶ Nordic countries under pressure: time for a true Nordic defence cooperation
- Techtritory Forum to be held October 22-23

[illegible]

8 – 14 SEPTEMBER (# 47)

TOP STORY: Russian drones over NATO's eastern flank

- ▶ NATO's response to Russian drone incursion: Eastern Sentry
- ▶ Baltic states want NATO's air policing mission to become air defence mission
- ▶ Baltic defence industry looked for and found partners from DSEI UK
- ▶ Ammo production in the planned Estonian defense industry park faces delays
- ▶ European Commission to allocate €14.7 billion to Baltic states in SAFE defence loans
- ▶ Baltic parliaments plead with U.S. Congress not to cut military funding to Baltics
- ▶ Estonian Defence Week kicks off
- ▶ Value of the 30 largest tech companies up by 35% to €27bln in two years, but plenty of problems remain

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Donald Trump has vowed to defend Poland, the Baltic states and NATO member states in the Baltic region if Russia escalates its aggression.
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Russia tests Eastern SENTRY as NATO scrambles jets after three Russian MiG-31s violate Estonian airspace

Three Russian MiG-31 fighters were reported to have violated Estonian airspace on the 15th of September. The Estonian Air Force immediately scrambled its F-16 fighters to intercept them. The Russian jets were seen flying in a loose formation, performing evasive maneuvers and emitting radar signals. The incident occurred in the vicinity of the Estonian-Latvian border. NATO expressed concern over the violation and called for a de-escalation of tensions in the region.



GDP in the Baltic region 2025

Country	GDP (Billion EUR)
Estonia	18.5
Latvia	22.5
Lithuania	35.5

15 - 21 SEPTEMBER (# 48)

TOP STORY: Three Russian fighter jets violated Estonian airspace

- ▶ NATO: Russia is testing our readiness
- ▶ Estonian Air Force's Chief of Staff: no need to be scared, but we need to be prepared
- ▶ Baltic region's largest defence industry event to start on Sept 22
- ▶ Granta Autonomy unveils its new X-WING loitering munition system with VTOL and fixed wing
- ▶ CEOs of leading defence companies: train is moving and Estonia is on board
- ▶ Latvia starts building plant for assembly of modular powder charges for artillery ammunition
- ▶ Rheinmetall, Lithuanian partners set to begin work on €300m ammunition plant
- ▶ Swedish owner of industrial group Hanza AB to Estonians: be proud, you deserve it!

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Rheinmetall to build artillery ammunition plant in Latvia

Rheinmetall has announced a plan to build a new artillery ammunition plant in Latvia. The plant is expected to be completed by 2027 and will have a capacity of 100,000 rounds per year. The company is currently in the planning phase and has already secured the necessary permits. The plant will be a significant addition to the defence industry in the Baltic region and will create many jobs for the local population.



GDP in the Baltic region 2025

Country	GDP (Billion EUR)
Estonia	18.5
Latvia	22.5
Lithuania	35.5

22 - 28 SEPTEMBER (# 49)

TOP STORY: Estonia hosts the largest defence industry event in the Baltics

- ▶ German defence giant Rheinmetall to build artillery ammunition plant in Latvia
- ▶ Hanno Pevkur: Rheinmetall's offer was not suitable
- ▶ EU defence chief Andrius Kubilius: Drone Wall could be ready in a year
- ▶ Estonian, Latvian defence tech companies team up to develop Drone Wall
- ▶ Lithuania's UDS signs a MoU with OQ Technology to pioneer 5G satellite connectivity for drones
- ▶ Estonia's Front42 signs MoU with Taiwanese AI drone innovator AiSeed.
- ▶ US-Israeli cybersecurity company Cyberbit acquires Estonian startup RangeForce

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German defence minister: we must build defences, but avoid Putin's "escalation trap"

German Defence Minister Boris Pistorius has stated that Germany must build up its defence capabilities to deter Russia, but must avoid falling into Putin's "escalation trap". He emphasized the importance of maintaining a strong and credible defence posture while avoiding any actions that could be perceived as provocative. Pistorius also mentioned the need for international cooperation and dialogue to address the challenges in the region.



GDP in the Baltic region 2025

Country	GDP (Billion EUR)
Estonia	18.5
Latvia	22.5
Lithuania	35.5

29 SEPT - 5 OCTOBER (# 50)

TOP STORY: We must build defences, but avoid Putin's escalation trap

- ▶ Vilnius Airport suspends air traffic over 25 weather balloons
- ▶ Defence giants welcome Europe's push to build a Drone Wall
- ▶ Japan's defence force is testing THEMIS UGV
- ▶ Milrem Robotics to deliver over 150 THEMIS UGVs to Ukraine
- ▶ Estonia still lacks laboratory facilities needed for testing explosives
- ▶ Estonia, Ukraine launch project to train over 500 cyber specialists
- ▶ Latvia shows it is a superpower in drone technology
- ▶ Lithuania to kick off its largest mobilisation exercise
- ▶ Lithuania to expand air defence with additional batteries

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Estonian Defence Forces to set up Force Transformation Command

The Estonian Defence Forces are planning to establish a new Force Transformation Command. This command will be responsible for coordinating and implementing the transformation of the Estonian Defence Forces into a more modern and capable fighting force. The command will focus on integrating new technologies, improving training and readiness, and enhancing the overall effectiveness of the force. The establishment of this command is a key step in the Estonian Defence Forces' modernization efforts.



GDP in the Baltic region 2025

Country	GDP (Billion EUR)
Estonia	18.5
Latvia	22.5
Lithuania	35.5

6 - 12 OCTOBER (# 51)

- ▶ TOP STORY: Force Transformation Command, a new structural unit of Estonian Defence Forces
- ▶ Tallinn becomes stage for global dialogue on AI, cybersecurity and digital resilience
- ▶ Deputy Minister of Defence of Ukraine: don't waste time on developing products that already exist
- ▶ Head of the French Agency for AI in Defence: Europe can no longer fail in technology
- ▶ Nortal's Senior VP for Defence: innovation can give smaller forces a decisive edge against larger adversaries
- ▶ Lithuania wins EU bid to set up €130m AI factory
- ▶ Nordic Investment Bank supports defence investments in Lithuania
- ▶ German-Baltic Chamber of Commerce to award the best among Def-Tech, Mil-Tech or Dual-Use startups

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ISSN 2792-1234
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To purchase Chummo rocket launchers

EU Defence Roadmap 2030 focuses on Eastern border security and C-UAV

The European Union has unveiled its new defence strategy, focusing on Eastern border security and C-UAV. The roadmap outlines a series of measures to enhance the EU's defence capabilities, including the development of a common drone wall and the establishment of a joint defence fund.

TECHRITORY FORUM 2025 – a roadmap to the ecosystem of digital future

The Techritory Forum 2025 is a landmark event in the Baltic region, bringing together leading experts and industry leaders to discuss the future of digital defence. The forum will explore the latest trends in digital technology and its application in defence, as well as the challenges and opportunities ahead.

13 – 19 OCTOBER (# 52)

TOP STORY: EU Defence Roadmap focuses on Eastern border security, C-UAV

- ▶ Europe unveils the plan for Drone Wall to shield the continent from Russian threats by 2027
- ▶ Defence official: three Baltic states should build an identical drone wall
- ▶ Riga to host the International Drone Summit and Expo
- ▶ Four companies to build weapons factories in Estonia's new defence hub
- ▶ Defence tech and military connectivity to be discussed at the Techritory Forum in Riga
- ▶ Denmark tests new drone concept with Danish battalion stationed in Latvia
- ▶ Apple to buy capacity of 110 MW solar farm in Latvia

Amazon Web Services opens office in Estonia

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ISSN 2792-1234
No. 52 | 20 - 26 October 2025 | www.balticdefence.com | English | Twitter: @balticdefence | Phone: +372 12 12345 | Email: info@balticdefence.com

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EUROPEAN DEFENCE ROADMAP

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ESTONIA PLANS TO PURCHASE CHUMMO ROCKET LAUNCHERS

Estonia has announced its intention to purchase Chummo rocket launchers from South Korea. The launchers are designed to provide a cost-effective and reliable means of air defence, and are expected to be delivered to Estonia in the near future.

20 – 26 OCTOBER (# 53)

TOP STORY: TECHRITORY 2025 – paving the way to the ecosystem of our digital future

- ▶ The three Baltic countries sign MoU to boost investment and research in chips
- ▶ Russian fighter jet violates Lithuanian airspace, NATO jets scrambled
- ▶ Vilnius, Kaunas airports forced to stop air traffic
- ▶ Lithuanian Minister of Defence resigns after clashing with PM over defence spending
- ▶ Estonia's **DefSecIntel Solutions** tested a solution for multi-layered drone shield
- ▶ **Marduk Technologies** signs MoU with South Korea's **Hanwha Aerospace**
- ▶ Lithuanian defence industry criticizes government for not buying local products
- ▶ Latvia to buy remote mine-laying system from **Dynamit Nobel Defence GmbH**
- ▶ Estonia to purchase South Korean-made **Chunmoo** rocket launchers

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ISSN 2792-1234
No. 53 | 27 October - 2 November 2025 | www.balticdefence.com | English | Twitter: @balticdefence | Phone: +372 12 12345 | Email: info@balticdefence.com

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27 OCT – 2 NOVEMBER (# 54)

TOP STORY: US has no plans to reduce its forces in the Baltics

- ▶ Baltic states to organise a joint defence and security industry forum and expo in May 2026
- ▶ Estonian defence minister: we made a better deal than Latvia, Lithuania
- ▶ **Robertas Kaunas** could become the next Minister of Defence of Lithuania
- ▶ **PST Group** wins €141m contract to build Rheinmetall factory in Lithuania
- ▶ A look into R&D in **LMT Defence**
- ▶ Tallinn hosts high-level forum of space industry experts
- ▶ European Defence Agency to host conference on autonomous systems
- ▶ Kaspars Pollaks to head the Latvian arm of **Frankenburg Technologies**
- ▶ **Meridein** to start testing its developed drones at Metroser

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ISSN 2792-1234
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3 – 9 NOVEMBER (# 55)

TOP STORY: Rheinmetall breaks ground on ammunition factory in Lithuania

- ▶ Lithuania in talks with **Rheinmetall** on second investment
- ▶ **Milrem Robotics**: autonomy is the future of warfare
- ▶ **Drone House** opens in Riga
- ▶ Baltic deep tech at the Nordic Singapore Innovation Days 2025
- ▶ Large supply contract with Royal Dutch Navy opens new export markets for **Alunaut**
- ▶ Developer of autonomous robotic vessels to start joint R&D with Korean partner
- ▶ Latvia's **LMT, Nokia** sign agreement to develop tactical defence com solution
- ▶ Estonian defence startup with average monthly wage of €5,900 seeks staff also from Croatia, UK
- ▶ NIB finances two major battery energy storage projects in Estonia with an €27.7m loan

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Baltic Defence Weekly

No. 60 | 8 – 14 December 2025 | www.balticdefence.eu | Editorial office: Laeva 2, Tallinn, Estonia



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Lithuanian, Estonian construction companies to build military base for the German brigade in Lithuania for €1 billion

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Latvia's LMT Group transforms from info operator to tech company

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Founder and investor: Estonia's defence sector is much larger than what is publicly known

VENTURE CAPITAL



KNDS, Rheinmetall to assemble Leopard 2A8 tanks in Lithuania

Lithuania Defence Services, a joint venture between German defence industry leaders KNDS Deutschland and Rheinmetall Landysteme, will invest almost €50m in the assembly of Leopard 2A8 main battle tanks in Lithuania.

It will be one of the largest defence sector investments in Lithuania and will significantly expand the capabilities of the Lithuanian defence industry. The production is scheduled to start in 2026.

According to Minister of Defence of Lithuania, Robertas Kuuskas, this investment not only strengthens the country's defence potential, but also creates a real industrial base capable of servicing the German brigade in Lithuania and providing services to other allied countries.

ALSO IN THE NEWS

NATO chief Mark Rutte: we are Russia's next target

NATO chief Mark Rutte this week urged allies to step up defence efforts to prevent a war against by Russia, that could be "on the scale of war our grandparents and great-grandparents endured".

In a speech in Berlin, Rutte said too many allies of the military alliance did not feel the urgency of Russia's threat in Europe and that they must rapidly increase defence spending and production to prevent a war on the scale of that seen by past generations.

"We see Russia's next target. I fear that too many are asleep at the switch. Tomorrow don't feel the urgency. And too many believe that time is on our side. It is not. The time for action is now. Conflict is at our door. Russia has brought war back to Europe. And we must be prepared," he added.

Rutte said he could be ready to use military force against NATO within two years, Rutte said.



Covering the defence industry of Estonia, Latvia, Lithuania and the wider Baltic Sea region since June 2024.

Baltic Defence Weekly

No. 61 | 15 – 21 December 2025 | www.balticdefence.eu | Editorial office: Laeva 2, Tallinn, Estonia



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Photo: Tuomas Toot, Viki 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 think of 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 successfully tests its counter-drone missile in NATO base in Latvia

On December 12, at the Aadi military training area in Latvia, Frankenburg Technologies successfully demonstrated the capabilities of its next-generation air defence missile system '1', consisting of a launch, interception and destruction of air targets.

Mark 1 air defence missile was tested against a target drone.

The company stated 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 12 months. The company aims to begin producing hundreds of units per day in Q4 2026, meeting on-demand scalable components to meet demand.

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TOP STORY: German company to build a €50m plant in Lithuania for assembly of Leopard 2A8 tanks

- ▶ Lithuania to buy CAESAR Mk II self-propelling howitzers from KNDS France for €252m
- ▶ Thirty-two Estonian defence tech companies make a high-level visit to Berlin, promote direct ties
- ▶ DefSecIntel Solutions to start strategic partnership with German counter-drone specialist TYTAN
- ▶ Baltic prime ministers: Rail Baltica will be completed on time
- ▶ Two Lithuanian, Estonian construction companies to build military base for the German brigade in Lithuania

- ▶ Latvia's LMT Group transforms from telco operator to tech company, unveils IoT Shortcut
- ▶ French-Estonian joint venture completes its energy storage park in Estonia
- ▶ Founder and investor: Estonian defence sector is much larger than what is publicly known
- ▶ Partner of US VC firm: we are looking for suitable defence tech startups from Estonia
- ▶ Lithuanian Defence and Security Industry Awards announced
- ▶ NATO Defence Accelerator selects 150 companies in record cohort
- ▶ Brolis secures large contract to supply Danish Army

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

- ▶ Ukraine Battlefield-Proven UAS Showcase in Tallinn
- ▶ Founder Ragnar Sass: it's time to build what matters!
- ▶ First-hand experience from Ukraine is becoming indispensable for defence sector legal advisor
- ▶ Estonian state should learn from Latvia and Lithuania on how to increase its role in defence sector
- ▶ Hanwha to invest in Estonian defence industry as Estonia orders Chunmoo rocket launchers

- ▶ NORDSEC to join Supply, Security & Defence Expo 2026 as Executive Partner
- ▶ European Defense Tech Hackathon to be held in Tallinn on Feb 27 – March 1
- ▶ Construction at German brigade's training area advances ahead of schedule
- ▶ Nefab Baltics donates innovative customised packaging equipment to Estonian Defence League
- ▶ Prime ministers of eight Eastern Flank countries urge EU to make their security a priority
- ▶ Four Baltic defence tech companies included in NATO DIANA 2026 Cohort