

Covering the defence industry of Estonia, Latvia, Lithuania and the wider Baltic Sea region

BALTIC DEFENCE WEEKLY

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Shahed-136 drone. Photo: Aleksandr Gusev

Russian drones over NATO's eastern flank. A new normalcy and what next?

Baltic states got a stark reminder this week when about 20 Russian drones entered Polish airspace that whether they like it or not, they are frontline countries.

Commenting the incident, **Kalev Stoicescu**, chairman of the National Defence Committee of the Estonian Parliament, said that NATO members' counter-drone capability and even the drone detection capability is seriously lacking. "In some cases it is virtually non-existent. This is unacceptable, because we all keep repeating, including here in Estonia, how we are learning from the war in Ukraine. So what have we actually learned?"

ALSO IN THE NEWS

Estonia's richest businesswoman: we must create a strong will to defend, not discuss buying property in Portugal

Estonian businesswoman **Reet Roos** said this week that she gets irritated by how slowly Estonia is developing its defense industry.

"Estonia should borrow, arm itself, and develop a solid war industry. We need to find within ourselves the same kind of will to defend as the Finns have, instead of discussing Portuguese real estate" she says.

Roos who owns Inspired Universal McCann, the largest media and advertising agency in the Baltic states, and whose assets are estimated to be worth €31 million, says that people in Estonia should stop talking about Portugal or Spain as a safe haven in case of crisis.

"It's not a safe haven, because the geopolitical situation isn't tense only in Estonia - it's all across Europe. And if things go wrong in the world, Portugal won't help anyone. What will help is a strong will to defend, the right mindset. I am not promoting moving to Portugal, Absolutely not. If you are going to relocate somewhere, look much farther, for example, to New Zealand. Portugal is definitely not the place. You could read in the Estonian media that Portugal is actually more afraid of war than Estonia."

NATO NATO's response to Russian drone incursion: Eastern Sentry (modeled by Baltic Sentry)

NATO Secretary General **Mark Rutte** announced on Friday, September 12 that NATO has launched operation **Eastern Sentry** to reinforce the defense of Europe's eastern flank after a Russian drone incursion into Polish airspace this week

The operation is modeled after the **Baltic Sentry** operation that NATO launched earlier this year in response to the sabotage of cables in the Baltic Sea.

NATO's Supreme Allied Commander Europe (SACEUR), US General Alexis Grynkeiwich, said the operation, which will be "flexible and agile," will include enhanced capabilities, integrated air- and ground-based defenses, and increased information-sharing among NATO partners.

Among the equipment dedicated to the operation Eastern Sentry are two F-16 fighter jets and an anti-air warfare frigate from Denmark, three Rafale jets from France, and four Eurofighters from Germany, according to a press release from the alliance.

"Although the immediacy of our focus is on Poland, this situation transcends the border of one nation. What affects one ally affects us all," Grynkeiwich said.



NATO Secretary General Mark Rutte (right) and NATO's Supreme Allied Commander Europe, US General Alexis Grynkeiwich at the launch of Eastern Sentry. Source: NATO

"Poland and citizens from across the Alliance should be assured by our rapid response earlier this week and our significant announcement here today," he said. "NATO will continue to defend every inch of its territory."

The operation will cover the entire eastern flank of NATO states, "from the high north to the Black Sea and the Mediterranean," Grynkeiwich said.

SACEUR in Tallinn to discuss the strengthening of NATO's eastern flank

Estonian Minister of Defence **Hanno Pevkur** and Commander of the Defence Forces Lieutenant General **Andrus Merilo** this week met in Tallinn with the NATO Supreme Allied Commander Europe (SACEUR), General **Alexis Grynkeiwich**, to discuss strengthening the eastern flank of the alliances

"The meeting with General Grynkeiwich confirmed that NATO is firmly committed to implementing existing decisions as well as further strengthening collective defence," said Defence Minister Hanno Pevkur.

"Estonia takes national defence very seriously and will allocate over five per cent of its GDP to this area in the coming years," he said, adding they also the unprecedented and unacceptable violation of Polish and NATO airspace was discussed.

"NATO responded decisively to the incident – for the first time, NATO fighter jets shot down drones that had entered its airspace," added the Minister of Defence.



NATO will continue to defend every inch of its territory.
- **US General Alexis Grynkeiwich**

"I received renewed confirmation that NATO takes the defence of our region very seriously. The presence, plans, and preparations of the allied forces are directly focused on real readiness to defend member states against possible aggression," said Lieutenant General **Andrus Merilo**, Commander of the Defence Forces.



General Grynkeiwich, Defence Minister Hanno Pevkur, Commander of EDF Lt Gen Andrus Merilo. Photo: Rasmus Allik

ICDS researcher: NATO mission likely to bolster Estonia's air defense

Marek Kohv, a researcher at the **International Center for Defense Studies (ICDS)**, believes the NATO mission to bolster the eastern flank will likely increase Estonia's air defense capabilities.

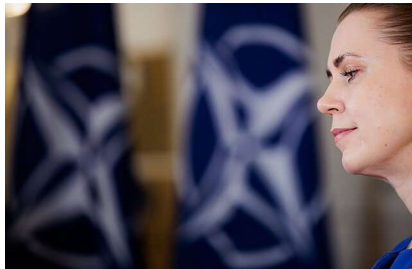
NATO is trying to better coordinate and integrate the capabilities that already exist on the eastern flank, said Kohv, adding that, for Estonia, it is likely to mean an increase in air defense capabilities.

Estonian defence minister Hanno Pevkur said that NATO also promised a form of special drone defense which primarily concerns increasing detection capabilities and response capabilities.

According to Kohv, most anti-drone capabilities in Europe and NATO are currently at the start-up level, so it is unclear what effective solutions could be produced in the region. Initially, it is likely that conventional means will continue to be relied upon, as was seen in Poland.

"Currently, the problem with NATO is that it is capable of responding and shooting down or damaging drones, but in reality, this is not a sustainable situation. If we take the cost of a fighter jet missile, which is in the range of €500,000 to €1 million, and the cost of a Russian drone, which is €10,000 to €50,000, then this situation is not sustainable," Kohv said.

This is also why not all the drones were shot down above Poland last week, said Kohv, adding that Ukrainians have been much more successful and effective when it comes to drone warfare.



Dovilė Šakalienė. Source: J. Stacevičius / LRT

AIR POLICING IN BALTICS Baltic states want NATO's air policing mission to become air defence mission

The NATO air policing mission in the Baltic countries should be replaced by rotational air defence, **Dovilė Šakalienė**, Lithuania's Minister of Defence, argued this week.

"We believe that it is time to move from air policing to air defence, which would require additional capabilities and a different concept, she said adding that NATO should lead the air defence mission in our region.

According to Šakalienė, Lithuania has prepared a position paper which will be discussed with the defence ministers of the other Baltic countries.



The NATO Baltic Air Policing Mission, carried out since 2004, is conducted from Lithuania and Estonia.

Estonian politicians: Ukraine has taught us nothing

Kalev Stoicescu, chairman of the National Defence Committee of the Estonian Parliament, said that NATO members' drone defence capability and even the drone detection capability is seriously lacking.

"In some cases it is virtually non-existent. This is unacceptable, because we all keep repeating, including here in Estonia, how we are learning from the war in Ukraine. So what have we actually learned?" he asked.

Marko Mihkelson, head of the Foreign Affairs Committee of the Estonian Parliament, added: "The situation is that, in certain scenarios, air policing may no longer be sufficient."

Mihkelson said that in addition to or alongside air policing, there should also be a clearly developed air defence mission, adding that the defense forces and Ministry of Defence should strongly present this idea to the allies when planning a new mission.

Riho Terras who is former Commander of Estonian Defence Forces and current Member of the European Parliament, added that an air defence mission has been discussed since 2014, and Estonia should definitely not wait around for NATO's plans, adding: "The Estonian state itself should make decisions quickly and determine how drone defense will be established in our country and invest in it rapidly. In my opinion, this has not been done quickly enough".



We all keep repeating, including here in Estonia, how we are learning from the war in Ukraine. So what have we actually learned?"

Kalev Stoicescu
chairman of National Defence
Committee of the Riigikogu

Ben Hodges: air defense mission instead of air policing

Former commander of US European Command, retired General **Ben Hodges**, says that Baltic air policing mission should be turned into air defense mission, granting fighter pilots the authority to shoot down Russian aircraft violating airspace.

According to him, it is possible that NATO will make this decision already during the planning of the new deterrence mission Eastern Sentry.

Russia has taken several aggressive steps against countries on NATO's eastern flank, but the alliance has so far merely watched these actions, adds Hodges.

One way to respond more forcefully is to transform Baltic air policing mission into air defense mission, says Hodges.

"They would have a different mission profile, carrying weapons and the authority to shoot down anything that they see that violates or looks like it about to violate the NATO airspace. That would be a very easy thing with which the nations could agree.



Ben Hodges is
former
Commanding
General of
US Army Europe.

I suspect although I don't know that Eastern Sentry will ultimately incorporate something like that."

Russian drones flew into Poland, where there are about 10,000 US soldiers.

According to Hodges, this clearly shows that Russia does not respect the US administration nor believes in NATO's deterrence.

NATO must find effective and more affordable ways to shoot down and detect drones, he added.



In order for a large organization to get moving, a huge failure is often necessary. The incident in Poland demonstrated that the alliance is not ready for drone warfare, and this embarrassment may ultimately be the needed push."

Ben Hodges,
former Commanding General
of US Army Europe

DSEI UK 2025

Baltic defence industry looked for and found partners from DSEI UK, one of the leading international defence industry expos

About 50 defence industry companies from the three Baltic states exhibited their solutions at the international defence expo DSEI UK 2025 held in London from September 9 until 12. Below is a short photo collage from Baltic presence at DSEI. More about DSEI UK 2025 in our next issue.



MANUFACTURING

Ammo production in the planned Estonian defense industry park faces delays

Companies considering to start producing ammunition in Estonia's planned national defense industry park are cautious because the government does not provide any guarantees that it will purchase the output, ERR wrote this week.

In June, initial proposals were submitted by ten companies with whom the state has begun negotiations, but lack of guarantees is eroding the project's attractiveness for investors.

Raul Kirsimäe, head of Swedbank's industrial department, told ERR that the companies producing in the defence industry park will be selling to states or governments, adding: "This is why long-term supply contracts are important for them. I think this is where the process is stuck. Suppose that an investor wants to build a factory in Estonia and buy equipment as long-term investment. No one would base a business plan like that on a one-off or single-year order".

Without state guarantees that it will purchase the output produced in the industry park, it is a huge risk for the companies. Also, since the defense industry park area is currently forested the company will have to cover the costs of clearing it, among others.

There will be also other costs, admits **Indrek Sirp**, special adviser for defense industry development at the Ministry of Defense.

Sirp explained that the land use under building rights includes a fee and if the produce wants to use services, for example, to store its ammunition or raw materials in the ammunition storage, there will also be a fee.

This means that the producer would have to pay a fee for storing ammunition while the state does not guarantee that it will buy it.



Public debate on the location of the defence industry park. Source: Rauno Volmar / Delfi Meedia

Says the Commander of Estonian Defence Forces Lieutenant General **Andrus Merilo**: "Despite the fact that a full-scale war has been going on in Europe for the fourth year, we still haven't got our defense industry up and running in such a way that the necessary equipment for training is actually being produced."

"Hopefully, they won't actually be needed in war, but if the state continues to drag its feet and hiding behind excuses, one day it may simply be too late," Merilo added.

EUROPEAN UNION

European Commission to allocate €14.7 billion to Baltic states in SAFE defence loans

EU Defence Commissioner **Andrius Kubilius** announced this week that the European Commission has approved the tentative allocation of the €150 billion SAFE defence loans among 19 member states.

The three Baltic states will be allocated a combined €14.71 billion under the SAFE mechanism.

Lithuania will be allocated €6.37 billion, Latvia will receive €5.68 billion and Estonia will receive €2.66 billion under the tentative allocation.

Two-thirds of EU's €150 billion SAFE defence loans will go to five countries

According to the tentative allocation, the largest recipient will be Poland with €43.7 billion or almost one third of the total money available under the Commission's SAFE defence loans programme.

The second-largest recipient will be Romania with €16.7 billion.

Rounding out the top five are France and Hungary, with €16.2 billion each, and Italy with €14.9 billion.

The defence commissioner praised the "equal geographical spread" of loans through the programme, which he said demonstrated that "not only eastern frontier countries are interested" in SAFE.



Andrius Kubilius, EU Commissioner for Defence & Space, at the European Parliament in Strasbourg. Source: Philipp von Dittfurth/picture alliance via Getty Images

Support for Ukraine is a common thread across 13 of the 19 countries' plans.

"The programme also includes provisions to support Ukraine by enabling joint procurement efforts within and for the country," Kubilius said.

The defence commissioner called the quick implementation of the SAFE programme as a "big bang", saying that Europe does not have time for the EU's typical slow-moving legislative proposals and drawn-out debates that can stretch more than a year.

The Commission will evaluate detailed plans for spending SAFE loans after the late November deadline and present the plans to the Council.

"The goal is to sign loan agreements and operational agreements with the member states in the first quarter of next year, and payments will follow immediately", Kubilius told the press. Commission President **Ursula von der Leyen** previously said the Commission would start disbursing the first SAFE loans as early as this December.

BALTIC-U.S. RELATIONS

Baltic parliaments plead with U.S. Congress not to cut military funding to Baltic states

One day after Poland shot down a number of Russian drones that violated its airspace, 36 MPs from Baltic parliaments sent a joint letter to the committees of the U.S. Congress, asking the U.S. Congress not to cut military support under the Baltic Security Initiative program.

“We kindly ask you to support the funding of the Baltic Security Initiative in the fiscal year 2026 Defense Appropriations Bill and its authorization in the National Defense Appropriation Act,” a joint letter dated September 10 said.

Lithuania’s Defense Ministry Policy Director **Vaidotas Urbelis** said this week in Vilnius that, the Trump administration plans to reduce the amount available under the program known as Section 333 to zero from the next fiscal year. Section 333 is an authority under which the U.S. provides training and equipment to enhance the security of partner states.

The cuts, which need to be confirmed by Congress, do not affect the deployment of U.S. troops, nor the support through the separate U.S. program called Foreign Military Financing, which is administered by the U.S. Department of State.



Getty Images via AFP, AL DRAGO

In the letter, the Baltic politicians thank the United States repeatedly for supporting the security of the Baltic States, and underline that historically the Baltic nations have been strong allies of the United States.

“We were together with you in Iraq and Afghanistan, we stand by Taiwan, Israel and the democratic opposition in Cuba, we resist autocracies in Belarus and Russia, we fight alongside you for freedom democracy, peace worldwide. We work with the United States for the security, sovereignty, territorial integrity of Ukraine, and its transatlantic future,” they write.

The Baltic MPs insist that security cooperation with the U.S. remains a strategic priority for all three countries.

“Your support will be instrumental in continuing the Baltic Security Initiative. Therefore, we kindly ask you to support the funding of the Baltic Security Initiative in the Fiscal Year 2026 Defense Appropriations Bill and its authorization in the National Defense Appropriations Act,” they add.

The parliamentarians also noted that they are committed to “buying American” in defence procurements.

Lithuania has received \$200.3 million of Section 333 funding over the financial years 2018-22, and Latvia and Estonia a total of \$360.2 million.

ESTONIAN DEFENCE WEEK

Estonian Defence Week kicks off with Defence Innovation Day on September 22

Estonian Defence Week will kick off on 22 September with the Defence Innovation Day, where leaders in defence, technology, and investment will explore how innovation is reshaping the future of security across the NATO alliance and beyond.

According to organisers, Defence Innovation is a platform for startups, scale-ups, governments, and industry players to exchange ideas, showcase cutting-edge solutions, and build meaningful partnerships.

The programme features keynote presentations, panel discussions, startup pitches, and networking opportunities – all aimed at accelerating capability development.

Defence Innovation Day will begin with greetings from **Hanno Pevkur**, Minister of Defence of Estonia, followed by a keynote from Martin Karkour, CRO at **Quantum Systems**, Europe’s defence unicorn in dual-use drone technology.

A high-level panel will then explore the future of government, industry, and defence, with insights from **Ivo Peets**, **Kadri Tammai**, and **Jaanus Tamm**, moderated by **Madis Kimmel**.

Innovative startups will take the stage throughout the programme. **Factiverse**, **Scaleout**, **Resquant**, **IS-Wireless**, and **GaltTec** will showcase dual-use solutions supported by **NATO DIANA**, while **Asvel**, **Swarmer**, **18°C Thermal**, **Harlequin Defense**, and **AEREUS** will present technologies ranging from counter-drone systems to battlefield situational awareness tools.



Getty Images via AFP, AL DRAGO

From Ukraine, **Ihor Fedirko**, CEO of the **Ukrainian Council of Defence Industry (UCDI)**, will share lessons from the battlefield, followed by a discussion with **Misha Rudominski (HIMERA)** and **Viktoriia Yaremchuk (Farsight Vision)**, moderated by Jaanika Merilo.

Innovation funding and collaboration across the New Nordics will be discussed by experts from **VTT** and **Vinnova**.

Held at Kultuurikatel in Tallinn, the event is powered by Tehnopol and the Estonian Ministry of Economic Affairs and Communications through the NATO DIANA Estonian Accelerator.

ESTONIAN TOP TECH**Value of the 30 largest tech companies up by 35% to €27bln in two years, but plenty of problems remain**

Value of Estonia's largest 30 top tech firms has grown in average by 48% in a year, shows the latest TopTech unveiled this week, writes Foundme.io.

"The total value of Estonia's 30 largest tech companies has soared to €27.7 billion, which is a massive 35.2% increase compared to two years ago," commented **Indrek Uudeküll**, a partner at **Prudentia** and one of the compilers of the TopTech ranking.

This year's ranking was topped by **Wise**, valued at €12.47 billion, followed by **Bolt** (€8.86 billion) and **Pipedrive** (€2.23 billion). Their ranking was the same also last year.

The ranking was compiled by **Prudentia Tallinn**, a M&A advisor, and **Siena Secondary Fund**, which focuses on secondary investments in technology companies.



This year's TopTech was once again won by Wise, pictured here with co-founder Taavet Hinrikus. Photo: Harry Tiits

DEFTECHS' VALUE GROWING

(defence tech companies shown in red)

#	Company name	Value mEUR
1.	Wise	12,471
2.	Bolt	8,856
3.	Pipedrive	2,228
4.	Skeleton	499
5.	Nortal	325
6.	Pactum	290
7.	Lightyear	272
8.	Elcogen	267
9.	Blackwall	221
10.	DefsecIntel Solutions	189
11.	Admirals Group	175
12.	Threod Systems	168
13.	Katana	161
14.	Helmes	160
15.	Frankenburg Technologies	150
16.	Toggl	150
17.	Milrem Robotics	140
18.	Car Rental Gateway	137
19.	Bondora	132
20.	Tuum	123

Source: Prudentia Tallinn, Siena Secondary Fund

COMMENT**"Estonian tech sector is like middle-aged family of professionals who are successful, but have no children"**

Allan Martinson, President of the Founders Society, says that the number of tech companies founded in Estonia continues to decrease.



Allan Martinson, head of the Founders' Society, believes that Estonia will one day have a unicorn founded by AI.

Photo: Andras Kralla

"Despite the fact that our technology companies are getting bigger and more mature, this is, on the other hand, also a problem.

Our techn sector is like a successful middle-aged family of professionals who keep earning more and have achieved recognition. But they have no children.

The best thing we can do is to act to achieve the so-called "birth rate" necessary for regeneration and growth in the startup sector.

The Estonian tech sector has entered a new and previously unseen phase of development. On one hand, its growth has accelerated again after some quieter years—in all likelihood, the total turnover will increase by 20–25% this year.

The sector's added value has grown especially quickly: since efficiency and profits are higher, added value has more than doubled over past 5 years!

Most of the growth in turnover and added value also comes from mature companies.

The new and weaker companies are struggling to get off the ground because early-stage capital is scarce. You keep seeing the same faces at startup events. There are few new entrepreneurs or people daring enough to quit their steady jobs and start their own ventures.

Is this stagnation and should we be worried? In some ways, certainly. But is there anything we can do about it?

Yes — by encouraging and helping those brave enough to take the plunge into the unknown, by attracting foreign founders to Estonia, etc.

But there are also issues we can't fight against. In the early 1990s, the birth rate nearly halved. If there's a dip in our demographic pyramid, something that Rein Taagepera aptly called the "demographic toilet bowl," it also brings drought among the founder population.

So now it's time for Estonia to consider how the same number of founders and employees can achieve more. The keyword here is AI! I am certain we'll see one-person startups reach tens of millions in turnover. And in the end, Estonia could have a unicorn founded by AI. That might not even be a joke.

The startup sector is now healthily profitable and no longer reliant on investors' money.

Although we are still far from the record year of 2022, when €1.3 billion in new capital was raised, it's likely that more capital will flow in than in the intervening two years.

This will boost growth in the coming years.

NORDIC PARTNERSHIP Kongsberg, Patria and Nammo AS strengthen cooperation and Nordic Partnership

Nordic countries are showing the way forward for Europe on how cooperate and forge strong partnership ties between leading defence companies.

The best example is the three leading Nordic defence companies **Kongsberg Defence & Aerospace, Patria** and **Nammo AS**.

The three companies form a significant Nordic defense alliance, with Kongsberg owning a significant share of Patria, and Patria and Kongsberg each owning 50% of Nammo

To showcase the strength and importance of the Nordic defense industry, particularly in light of Finland and Sweden's NATO membership and demonstrating the impact of Nordic collaboration, on September 10 the three companies held a Nordic Reception at the DSEI UK defense exhibition.



Patria, Kongsberg and Nammo held a Nordic Reception on Sep 10. Source: Patria

Patria's President and CEO: strengthening Europe's defence through cooperation and strategic industry development

At the start of September, **Esa Rautalinko**, President and CEO of **Patria**, wrote in Patria Magazine: "European countries closest to Russia have best understood the importance of strengthening defence capacity. In addition to Finland, Norway, the Baltic countries and Poland are prime examples of how to develop defence capabilities systematically. Sweden and Denmark followed suite and have increased their contributions significantly as well.

Importantly, cooperation – both nationally and internationally – remains crucial for the systematic development of European defence and the defence industry. Without binding joint procurement decisions underpinning a firm long-term perspective, the capital-intensive defence industry can not increase its production to the level required for improvement in security situation.

Importance of cooperation in the development of defence

Finland is a good example of seamless cooperation between the defence administration, the defence forces and the defence industry. In many other countries, such cooperation does not exist. The Finnish defence industry has shown great resilience in crisis situations.

European defence collaboration is one of the best and most productive ways to keep peace in Europe.

The war in Europe is driving long-term demand growth for defence materiel. Long-term plans and commitment together with continuous collaboration are needed to improve overall preparedness, but also to give the industry a much-needed security for investments.

We have already witnessed that joint European projects enhance European equipment acquisitions. European defence collaboration is one of the best and most productive ways to keep peace in Europe.

Joint European projects enhancing European equipment acquisitions, such as the CAVS (Common Armoured Vehicle System) programme based on the Patria 6x6 vehicle, or the European Defence Fund's R&D projects, such as FAMOUS (European Future Highly Mobile Augmented Armoured Systems), are great and tangible examples and success stories combining European collaboration and development of interchangeable equipment and performance.

When if is not an option

Europe's production capacity is still on a lower order of magnitude compared to the threats faced. The range of security challenges we must address is expanding every day, forcing us to think differently and act accordingly.

Innovation in defence is crucial for maintaining military effectiveness, technological superiority, and national security in the face of evolving threats.



Esa Rautalinko, President and CEO of Patria

It enables the development of new technologies, enhances operational capabilities, and strengthens the defence industry's competitiveness.

As Patria is a key part of Finland's security of supply, preparing for various crises and ensuring comprehensive security are always at the core of Patria's operations. We remain committed to enhancing our customers' defence capabilities with our market-leading products and services. When if is not an option."

Nordic Partnership in a nutshell

- ▶ Patria, Kongsberg, and Nammo are leading Nordic defense companies that collaborate and offer complementary products and services.
- ▶ **Kongsberg Defence & Aerospace** is a major Norwegian defense company. It has approximately 15,000 employees.
- ▶ **Nammo** is a Norwegian-Finnish company specializing in ammunitions and aerospace propulsion with over 3,000 employees.
- ▶ **Patria** provides defense, security, and aviation life-cycle support services with over 3,000 employees.