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WHAT ARE THE MAIN DRIVERS OF MEMBER STATES' DEFENCE PROCUREMENT PRACTICES?

The Estonian Case

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Armament Industry European Research Group

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ABSTRACT

This article examines the evolution of Estonia's defence procurement practices, especially following Russia's full-scale invasion of Ukraine in 2022. It argues that Estonia´s defence capability development remains firmly threat-driven and in line with NATO collective efforts. However, Russia´s full-scale invasion of Ukraine has accelerated timelines and reprioritised some of the defence articles such as ammunition, air defence and unmanned systems. Furthermore, there has been evident shift towards more dynamic and effect-driven acquisition models, and the growing emphasis on delivery speed and supply security, which requires a revaluation of established practices and structures that often prioritize rigidity and cost-effectiveness over agility and responsiveness. The paper further explores the efforts to strengthen the domestic defence industrial base through localisation, innovation support and EU instruments, as well as the drivers and limitations of Baltic and EU-level joint procurement.

Keywords: Estonian defence | defence investments | procurement practices | defence industry | EU instruments

INTRODUCTION

For Estonia, as a frontline NATO Ally bordering Russia, defence capability development has, since regaining independence in 1991, been driven by the threat posed by Russia and has been closely aligned with NATO defence planning since joining NATO in 2004. Russia's full-scale invasion of Ukraine in February 2022 did not fundamentally change Estonia's strategic orientation in defence planning, but it significantly accelerated anticipated timelines and sharpened the short-term focus on capabilities that have proven to be critical shortfalls on Ukraine's battlefield, such as ammunition, air defence, UAS, stockpiling, and operational readiness.

Estonia´s defence procurement system is characterised by a legally sound and risk-conscious approach, where most defence procurements are centralised under Estonian Centre for Defence Investments (ECDI), established in 2017 (ECDI, 2026). With long-term experience and a proven ability to administer hundreds of procurement procedures per year, the organisation has, depending on the nature of the requested military article, used all legally possible procurement practices. Open and restricted procedures in accordance to Directive 2009/81/EC remain the default option, ensuring competition and transparency. The defence and security exceptions are mostly used in cases involving classified information or essential security interests, and are applied to about 10-20 per cent of annual procurements (Interview 3), (Riigi Teataja, 2017). Framework agreements are used only when long-term demand can be predicted with reasonable certainty, such as for ammunition. Innovation procurement mechanisms, where the operational problem is identified rather than prescribing technical specifications, exist in principle but are not yet widely applied. However, as a direct consequence of lessons learned from the Ukraine battlefield, the dynamic procurement system (DPS) and innovation procurement mechanisms are gaining more focus.

MILITARY REQUIREMENTS AS THE MAIN DRIVER OF PROCUREMENT

Since the breakout of Russia´s full-scale invasion in Ukraine, Estonian Government has significantly raised the defence expenditure. Estonia has committed to raising defence expenditure to 5% of GDP from 2026, compared 2,14% in 2022 and 3,43% in 2025, meeting the new NATO commitment agreed at the 2025 Hague Summit (NATO Heads of State and Government, 2025). With the latest Development Plan for the Ministry of Defence Area of Governance 2026-2029, more than €10 billion has been allocated to acquiring defence capabilities (Ministry of Defence, 2025a). Approximately €6 billion has been allocated over the next decade to ammunition procurement alone. The priorities for Estonia’s procurement decisions are set through the ambition to fulfil NATO capability targets in a way that supports national defence requirements. NATO capability targets are translated into Estonia's national procurement priorities by integrating the targets into the national defence policy and planning process, covering long-term (10 years), medium-term (4 years), and short-term (1 year) spectra, ensuring that procurement decisions align with NATO's collective defence efforts while addressing specific national defence requirements (Ministry of Defence, 2022). In 2026, Estonia's defence spending amounts to €2.4 billion (~ 5.43% of GDP), significantly exceeding NATO´s defence expenditure commitment. This is almost four times more than in 2021, before the breakout of full-scale Russian aggression against Ukraine. In the years 2026-2029, 37% of Estonia's defence budget will be spent on acquiring defence assets, with a further 25% on ammunition, to sustain the rapid replenishment of ammunition stocks (Ministry of Defence, 2026b). Within this context, procurement frameworks, institutional choices, and participation in joint procurement instruments are primarily treated as tools for capability delivery and often the decision-making on the use of the instrument is based on the sense of urgency – the preference is the shortest timeline, which provides the required effect.

Lessons learned from the battlefield in Ukraine have been integrated into Estonia’s long-term defence planning and procurement processes to some extent. The starting point remains the identification of the military capabilities required by the Estonian Defence Forces, based on threat assessments, NATO capability targets and operational planning. However, the latest long-term outlook, the “Defence Development Plan 2021-2031” was adopted before the outbreak of Russia´s full-scale war in Ukraine, and its renewal is currently ongoing (ERR, 2021).

In addition to integrating lessons from Ukraine battlefield into Estonian defence planning practices, Estonia is actively enhancing its defence industrial relationship with Ukraine through various initiatives. As an example, Estonia recently signed a Letter of Intent with Ukraine to foster defence industry cooperation through the "Build with Ukraine" initiative (Ministry of Defence, 2026c). This programme combines Estonian technological solutions with Ukrainian combat experience, enabling faster production of innovative defence solutions. Several Estonian defence companies are already collaborating with Ukrainian partners to produce attack and interceptor drones, as well as electronic warfare systems, highlighting the practical aspects of procurement and technology sharing. To support these efforts, Estonia plans to allocate 15 per cent of its 2027 aid measure—approximately 15 million euros. Furthermore, Estonia has pledged to allocate at least 0.25 per cent of its GDP annually for direct military support to Ukraine, focusing on acquiring drones and anti-drone systems while contributing to the training of Ukrainian troops.

In recent years, the focus has shifted towards increasingly dynamic and effect-driven procurement models which prioritise speed, flexibility and innovation. Rather than prescribing narrowly defined technical specifications from the outset, the Estonian Defence Forces now seek to define the desired operational effect and performance outcome, allowing industry greater flexibility in proposing solutions and fostering rapid adaption to changing needs. This approach reflects an understanding that technological innovation, particularly in areas such as drone warfare and the use of unmanned systems, electronic warfare for jamming and surveillance and secure digital infrastructure, often evolves more rapidly than traditional procurement cycles can accommodate.

In a dynamic procurement procedure, the objective is to identify the most cost-effective and operationally relevant solution through multi-stage procedures. These typically involve an initial definition of the operational problem, followed by a pre-selection phase in which viable technological approaches are assessed and tested, and, if needed, technically refined. Such phased processes enable iterative feedback between end-users and suppliers, thereby diminishing the risk of acquiring systems that fail to meet operational requirements (Interview 3).

As a result, innovation has become a more integral component of procurement practice. The system increasingly encourages adaptability, shorter development cycles and closer engagement with cutting-edge technologies, while still operating within the constraints of public procurement law and accountability requirements. However, while operating within the framework of European Union directives, Estonia applies its national public procurement law in a manner that is occasionally is regarded as more restrictive than the EU baseline, particularly below the international threshold[1]. The Ministry of Defence is currently working with framing internal procurement practices to facilitate more transparent decision-making (Interview 1).

Another novel trend since February 2022 has been a shift away from price-dominated selection criteria. Delivery timelines, scalability, sustainability, and supply security have gained more weight (Interview 3).

[1] The international threshold in the field of defence and security is an amount that is established periodically by the European Commissionon basis of Articles 8 and 68 of Directive 2009/81/EC of the European Parliament and of the Council

ENHANCING DEFENCE INDUSTRY AND FACILITATING LOCALIZATION

As stipulated in the Defence Industry Policy 2024–2030, simplifying procurement procedures for the Estonian defence industry constitutes a key strategic priority (Ministry of Defence, 2025b). The policy recognises that administrative complexity and lengthy procurement cycles can disproportionately disadvantage SMEs that constitute the majority of Estonia’s defence industrial base. In response, the Ministry of Defence is working to formulate clear principles for engaging domestic industry in defence acquisitions. This includes improving transparency in procurement plans, facilitating early dialogue between end-user and defence industry, and promoting procurement models that allow for greater flexibility and innovation.

However, the objective is not to implement protectionist measures or to privilege domestic suppliers at the expense of competition. Rather, the guiding principle is to ensure that Estonian defence companies have fair access to procurement opportunities, both nationally and within European frameworks. Strengthening the domestic defence industry is seen as an integral component of defence overall capacity: resilient supply chains, local maintenance capabilities, and the export of technological know-how directly contribute to operational readiness and the security of the supply. At the same time, improving the competitiveness of Estonian companies in international markets with a focus on EU-funded projects and multinational consortia, is seen as essential for long-term sustainability and increasing industrial capacity. Among others, NATO DIANA (Defence Innovation Acceleration for the North Atlantic) and the European Defence Fund (EDF) have seen as viable tools for enhancing industrial efforts (Interview 1), and sustained governmental support for these instruments has been highlighted in the Estonian Defence Industry Policy (Ministry of Defence, 2025b). Since 2022, NATO DIANA has provided for Estonian dual-use technologies fulfilling the military requirements equal opportunities to participate in thirteen different accelerators and test their products across over 100 testing centres. Notable success stories include GaltTec, which was the only Estonian startup selected in DIANA's first year from over 1,300 applications. In its second year, with more than 2,600 applicants, two Estonian firms, Telearmy and Wayren, successfully completed the program, demonstrating an increasing recognition of Estonian companies within the NATO DIANA framework. Wayren's recently signed €7.9 million strategic investment agreement with the EFA Group (Tehnopol, 2025).

Estonia’s defence industry is growing, particularly in high-tech technologies such as sensors, robotics, and unmanned systems. However, scalability remains a challenge as the Estonian defence industrial base is largely composed of SMEs that specialise in agile, niche solutions rather than large-scale serial production. As a result, Estonian companies do not always possess the capacity to manufacture in large volumes independently (Interview 5). Instead, they tend to focus on developing rapid, innovative solutions, often in emerging technologies, and subsequently seek partnerships with larger prime contractors to scale production and integrate their technologies into broader systems. Lately, Estonian companies have been more actively seeking multinational collaboration opportunities such as Frankenburg Technologies collaboration agreements with PGZ, Babcock, Hanwha Aerospace and others to explore the development of variety of affordable defence systems such as air defence, missiles, interceptors etc. to counter increasing drone threats (Ruitenberg, 2026; Bernachhi, 2026).

Estonia's limited domestic market and industrial footprint make it economically difficult to sustain large-scale production facilities. At the same time, the ecosystem has proven competitive in early-stage innovation, particularly in areas involving software expertise, autonomy, and digital integration. For example, Estonian start-up DefSecIntel received the Milipol innovation prize in 2025 for developing a mobile radar system that detects enemy combat drones. (Von der Brelie, 2025).

In addition, the Estonian government also seeks opportunities to include localisation elements, including maintenance, repair, and technology transfer, as well as ammunition and explosives production (Interview 2). The aim is to reduce dependence on external partners during crises or wartime in the areas that have proven critical in Ukraine. Beyond immediate operational benefits, localisation is also viewed as a means of deepening national expertise. However, localisation requirements have not been introduced as part of the procurement evaluation up to now, but the consultations are ongoing to assess the full lifecycle of acquired capabilities more thoroughly. The coalition agreement for 2024–2027 of Estonian Government stipulates that detailed principles will be approved at the government level (Government, 2024).

One of the means offered by the Estonian Government to support localisation efforts is the development of the defence industry parks, which are aimed to provide the base infrastructure for ammunition and military explosives production (ERR, 2025c). The first contract with the initial company was signed in December 2025 with Nitrotol OÜ for the production of military explosives and ammunition, including mines and charges (ECDI, 2025b).

DRIVERS AND LIMITATIONS FOR JOINT PROCUREMENT

In adopting joint procurement, Estonia has a pragmatic approach. Cooperation is pursued when it offers a practical advantage and is not regarded as an objective in itself. Joint procurements typically emerge through regional and multinational cooperation formats, including Baltic, Nordic and EU frameworks. Consequently, while Estonia often prefers to utilise its national defence investment centre for conducting the defence procurements, it also actively engages with various international procurement bodies, such as the NATO Support and Procurement Agency (NSPA) and the European Defence Agency (EDA) and seeks for effective usage of defence investment instruments such as SAFE (Security Action for Europe), the European Defence Fund (EDF) and European Defence Industrial Partnership (EDIP).

For years, there has been sustained discussion regarding the potential for improved joint procurement among the three Baltic States—Estonia, Latvia and Lithuania. From a strategic perspective, closer coordination appears both logical and desirable, given the shared threat environment, geographic proximity, and the need to ensure interoperability within NATO's regional defence plans.

However, historically, such cooperation has been constrained by structural and doctrinal factors (Interview 4). The development paths of the three national defence forces have differed significantly since the restoration of independence. Estonia has consistently maintained a defence model centred on mandatory conscription and a large reserve force, embedded within a total defence concept. In contrast, Latvia and Lithuania for many years pursued predominantly professional armed forces and only reintroduced conscription more recently. These divergent force structures have naturally influenced capability priorities, equipment requirements, and procurement timelines. Differences in defence planning cultures, budgetary cycles, and industrial engagement have further complicated attempts to align large-scale acquisitions. However, there have been some large-scale success stories, such as the procurement of German Iris-T air defence system in cooperation with Latvia (ERR, 2023) and HIMARS multiple launch rocket systems procurement in cooperation with all three Baltic States (ERR, 2025).

Within the Baltic framework, the required capabilities include integrated air and missile defence (iAMD), ammunition, artillery systems, military mobility and counter-mobility, UAS and counter-UAS, ground combat capabilities, and individual soldier equipment (Interview 4). On 30 January 2026, the three defence ministers of the Baltic States signed the Joint Communique of the Baltic Defence Cooperation Ministerial Committee, which, among other co-operation efforts stressed the willingness to enhance joint capability development to improve interoperability within the Baltic States (Ministry of Defence, 2026a).

In the context of enhancing European Defence Industry, Estonian Defence Industrial Policy has outlined 5 priority areas such as European regional air and missile defence systems, long-range strike capabilities, drone production capabilities, European underwater surveillance and critical infrastructure protection capabilities, and ammunition and explosives production. The transforming European defence financing landscape may create new incentives for closer cooperation. Under the EU's SAFE loan instrument, joint procurement constitutes one of the eligibility requirements for accessing funding (European Commission, 2026). The European Commission has endorsed the Estonian defence procurement projects amounting to approximately €2.34 billion. The proposed projects include integrated air and missile defence (iAMD), ammunition, artillery systems, military mobility and counter-mobility (defensive belts), UAS and counter-UAS, ground combat capabilities, and individual soldier equipment. In this context, joint procurement is no longer solely a political aspiration, but increasingly a practical prerequisite for accessing substantial financial support.

European Union defence instruments have become increasingly relevant to Estonia's procurement ecosystem, although they remain supportive rather than determinative.

The EDF primarily supports medium- and long-term capability development. Estonia proactively seeks to align national priorities with upcoming EDF work programmes. Dedicated national co-financing is allocated to highly prioritised projects. In 2025, the Ministry of Defence identified three Estonian firms, Defsecintel Solutions OÜ, Threod Systems OÜ, and Frankenburg Technologies, taking a leading role in pan-European defence consortia focusing on airstrike munitions and the production of critical infrastructure and granted them a total of €900,000 in co-financing (ERR, 2025a).

As an example 2025, the Europe's largest unmanned ground systems development programme, Integrated Modular Unmanned Ground Systems (iMUGS2), was officially launched in Brussels under Estonia's leadership (ECDI, 2025a).

EDIP is viewed as a possible avenue for enhancing national security and bolstering European defence capabilities. Estonia anticipates that EDIP will facilitate collaborative efforts among EU member states, thereby strengthening interoperability and optimising resource allocation. The potential of EDIP to drive advancements in defence technology and innovation are recognised and seen as essential for maintaining military readiness as well as raising international competitiveness of national defence industry (Interview 1). One of the key expectations is that EDIP will prioritise transparency and information sharing among member states, thereby reinforcing collective defence mechanisms. The priority areas include European regional air and missile defence systems, long-range strike capabilities, drone production capabilities, underwater surveillance and critical infrastructure protection, and ammunition and explosives production with emphasising the need to prioritise urgent NATO-related requirements such as air and missile defence, indirect fire capabilities, and the enhancement of critical ammunition stockpiles (EIS, 2024).

However, with all the expanded EU instruments, there exists a structural challenge for smaller nations - substantial administrative burden. Large-scale funding programmes require extensive documentation and compliance procedures. During the interviews, the challenge was amplified at all levels.

CONCLUSION

Estonia’s procurement practices reflect the realities of a small frontline state operating in a high-threat environment. Procurement choices are guided first and foremost by NATO capability targets, operational readiness, and delivery speed. Since February 2022, urgency, ammunition stockpiling, innovation acceleration, and increased defence spending have altered the procurement timelines but less in the principles. However, there is an evident shift towards more dynamic and innovative procurement practices, where the desired effect defines the operational requirements, allowing for faster adaption to changing battlefield requirements.

Strengthening the domestic defence industry is another national priority. Through promoting local production and maintenance, Estonia aims to enhance the operational readiness and reduce dependencies on external suppliers and supply chains during crises. The increasing focus on innovation and cutting-edge technologies through fostering the partnerships between SMEs and prime contractors, could facilitate rapid development and deployment of effective military solutions.

Joint procurements have been mostly adopted when they deliver scale, interoperability, and faster access to capabilities. However, the new EU defence instruments (such as SAFE, EDF, EDIP) have set more focus on collaboration and joint efforts, though bureaucratic challenges pose the limitations for small nations to fully leveraging these instruments.

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