

# Risks

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# Military threat



**Threat assessment:** The likelihood of a direct military attack on Estonia in 2025 is considered low, but Russia's policy toward us remains hostile, and its confrontation with Western states continues. Despite enormous losses, Russia's armed forces are growing; it is learning lessons from the war and rapidly developing new capabilities, including drone technology. Compared with the previous risk outlook, the overall threat assessment has not changed.☒

Against the backdrop of the war in Ukraine, Russia is preparing for a long-term confrontation with NATO, with conflict potential that in the medium term also requires strengthening its western border with additional units. Over the past 15 years, Russia's military rhetoric, aggressiveness, and readiness to use military force to achieve its objectives have steadily increased.

Almost certainly, Putin's determination can be explained by the knowledge that losers are not respected in Russia, and therefore – for reasons of prestige alone – he must end the war with an outcome that can be presented as a victory. The Kremlin leader thus remains motivated to find the resources necessary to continue the war, despite costs far greater than originally anticipated and the ever-increasing burden the war places on Russia.

The Kremlin has chosen the path of long-term confrontation and has decided to continue mobilizing additional societal resources both to expand its armed forces and to achieve the goals of military reform. If Russia succeeds in continuing the planned formation of new force groupings under its military reform, Estonia and NATO will in the coming years face a Russian force posture that constitutes a long-term military threat. If the war in Ukraine ends under conditions favourable to Russia, or the conflict is frozen, it is almost certain that more Russian military units will be permanently stationed on Estonia's borders than before 24 February 2022.

## THREATS

- ✓ In the fourth year of Russia's full-scale war of aggression against Ukraine, relations between Estonia and Russia remain predictably at a low point, with no prospect of improvement in the coming years. Russia's objectives and actions toward the Baltic states have not fundamentally changed, but its perception of threat regarding developments in the region has grown.

- ✓ Russia perceives that its strategic position in the Baltic Sea has weakened and its long-term risks have increased, following the start of the war and the accession of Sweden and Finland to NATO. From Russia's perspective, potential risks in the Baltic Sea include the blocking of connections to Kaliningrad and the closure of the Gulf of Finland to maritime traffic. These scenarios demand both preventive measures and the preparation of possible countermeasures.
- ✓ Within a single year, both an army corps and a motor rifle division were formed in Estonia's near vicinity, demonstrating Russia's ability to create large force groupings in a relatively short time. Overall, Russia is expanding its armed forces both nominally – by presidential decree increasing the number of positions in the military – and in practice through recruitment.
- ✓ Russia's defence expenditures in the state budget are breaking records year after year. For 2025, spending on defence and internal security is set to reach nearly 18 trillion rubles, amounting to 40% of the total federal budget. At the same time, there are clear signs that the rapid expansion of defence industry output, fuelled by state funding flows, has reached its ceiling.
- ✓ Based on lessons and experiences from the war in Ukraine, the Russian government has decided to ensure technological and industrial readiness for the large-scale deployment of drone technology. A national drone development program, combined with wartime experience, will likely secure Russian armed forces a strong position in applying drone technology over the long term. After the active fighting in Ukraine ends, Russia will almost certainly apply its experience from drone warfare – as well as its knowledge of the capabilities and weaknesses of Western air defence – when building up forces along the borders with Estonia and NATO.
- ✓ In September 2025, the Russia–Belarus strategic military exercise *Zapad-2025* will take place. The last such large-scale exercise occurred in 2021 (*Zapad-2021*). In the intervening years, Russia has conducted major naval- and air force-centred exercises, for example *Okean-2024* last year.

## ACTIONS

- ✓ NATO has identified Russia as the most serious and immediate threat to the Alliance. NATO must be prepared for immediate collective defence operations across the entire territory of the Alliance. Estonia's military defence is based on both independent defence capability and collective defence. Estonia is a member of NATO and the European Union (EU) and works in close cooperation with allies and other international partners.
- ✓ Estonia continues to accelerate the development of its independent defence capabilities and additional force capacities. In April 2025, the government approved the national defence investment supplementary program KILP, allocating an average of 5.4% of GDP to national defence until 2029.
- ✓ Estonia, together with the EU, NATO, and global partners, provides strong support to Ukraine and

- ✓ continues military assistance until Ukraine has won the full-scale war launched by Russia. By government decision, Estonia will provide Ukraine with annual military aid amounting to 0.25% of GDP from the defence budget during 2024–2027.
- ✓ The accession of Finland and Sweden to NATO strengthens security in the Baltic Sea region. Estonia plays an active role in shaping a new regional security framework that ensures credible deterrence.
- ✓ Within the framework of comprehensive national defence, the entire Estonian society contributes to defence. The aim of Estonia's defence policy is not only to win a possible conflict but to prevent it through deterrence – the most effective and least costly way to defend the country. A whole-of-society approach strengthens Estonia's resilience and readiness for any crisis. As such, comprehensive defence also has a deterrent effect, sending a clear message to any potential aggressor that Estonia is a resilient state and society.

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