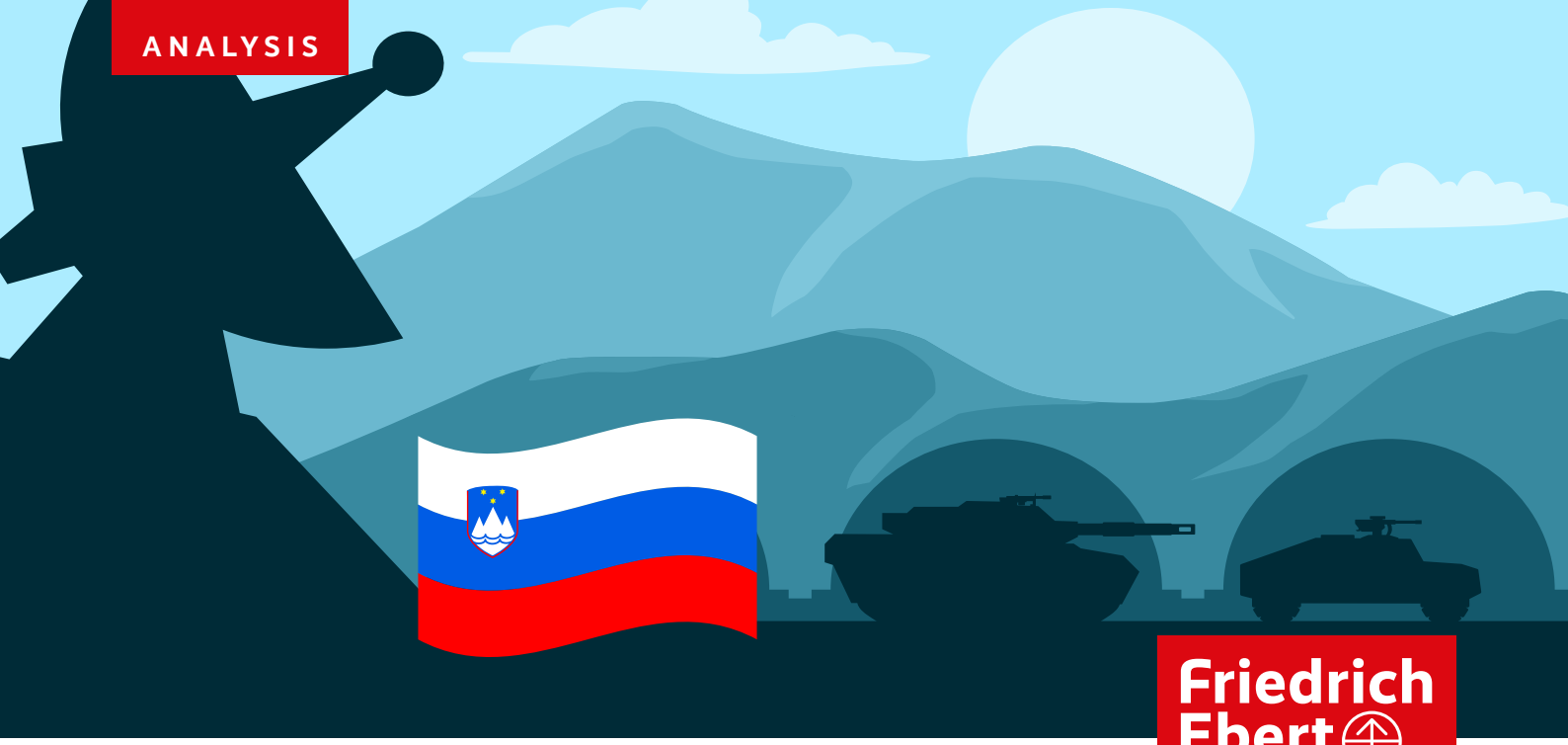
ANALYSIS



Friedrich Ebert Stiftung

Defence Industry in Central Eastern Europe

Analysis of the Slovenian Defence Sector

Katja Geršak/Jelena Juvan

This paper analyses the contemporary Slovenian defence industry, with particular emphasis on current capabilities, structure, and strategic importance within the EU-NATO framework. A brief historical overview of the Yugoslav period and the transition after independence is included to provide essential context for today's industrial and institutional arrangements. The main emphasis is placed on present-day developments, including technological orientation, dual-use innovation, and international integration. The chapter concludes by assessing the sector's economic contribution and future potential.

1. Historical Review: Defence Industry during Yugoslavia and after Independence

After 1945, Yugoslavia systematically established an extensive defence-industrial complex. In Slovenia, key facilities included Barutana Kamnik (explosives), Železarne Ravne (special steels and weapons components), TAM Maribor (military trucks and light armoured vehicles), and Iskra (communications, electronics, optics, and lasers) (Završnik, 2014). Due to the political split with the Soviet Union in the late 1940s, Yugoslavia invested substantial resources in developing its own military industry, which led to significant technological growth in the 1970s and 1980s. During the socialist era, Yugoslavia maintained one of the largest defence industries in the non-aligned world, ranging from infantry weapons and ammunition to armoured vehicles, electronics, shipbuilding, and aircraft production. The industry was able to meet up to 80% of the requirements of the Yugoslav People's Army (JLA). The industry was highly specialised, technologically advanced, and strongly export-oriented. Slovenian firms delivered critical sub-components that were then integrated into larger platforms manufactured in other republics. Because of Yugoslavia's strategy of dispersing defence production geographically for political and security reasons, Slovenia's industrial capacity was essential for federal autonomy.

Slovenian companies, however, were limited despite their innovations because decisions were centralised in Belgrade and independent export was prohibited; all exports were conducted exclusively through the state company SDPR. By the end of the 1980s, the Slovenian defence industry comprised three major military factories and 25 larger subcontractors, and produced more than 220 million pieces of ammunition and equipment annually.

The War for Independence and Development of Slovenia's Defence Sector

Independence brought significant challenges for the Slovenian defence industry. The breakup of Yugoslavia, the end of the Cold War, and the UN arms embargo caused sales to

fall almost fourfold and severed links with traditional buyers and partners.

Yugoslav-era production had been highly fragmented; Slovenian companies typically manufactured components rather than complete systems. This model became unviable once the federal market disappeared. The Slovenian defence industry therefore required drastic restructuring and faced a severe decline. Most firms faced immediate contraction, minimal domestic demand, bankruptcies, and restructuring towards civilian production (Kopač, 2002). At the same time, Slovenia developed its defence legislation, including the 1994 Defence Act, which set rules for military production and trade. According to this Act, companies must obtain the consent of the Government of the Republic of Slovenia for the trade in military equipment and the consent of the Ministry of Defence of the Republic of Slovenia (MORS) for its production.

NATO and EU membership had already reoriented Slovenia towards modern Euro-Atlantic standards, requiring full STANAG compatibility and extensive technological upgrades. Integration into EU defence frameworks – EDF, PESCO, and NATO STO – further boosted collaboration and innovation. During this period, Slovenian companies expanded in high-tech niches such as UAV/UGV systems, anti-drone technologies, sensors, C2 systems, secure communications, simulators, weapon stations, protective materials, and military textiles. Firms including Fotona, Guardiaris, Valhalla Turrets, Carboteh, Globus, and Arex increasingly positioned themselves as export-oriented producers. Growing defence budgets and procurement programmes (e.g., 8x8 vehicles, C4ISR, helicopters) created opportunities for domestic participation through offsets. Overall, Slovenia evolved into a small but technologically capable, internationally integrated defence producer within the EU-NATO ecosystem.

Russia's aggression against Ukraine in 2022 triggered broad European reforms, renewed attention to military readiness, increased spending, and revived interest in strengthening domestic industry. In Slovenia, this led to adjustments in strategic documents, increased spending, and attempts to strengthen the defence industry, most recently with the establishment of DOVOS.

2. The Situation Today

Over the past two decades, Slovenia has pursued a strategy emphasising technological autonomy, dual-use innovation, and integration into multinational development programmes. The Ministry of Defence of the Republic of Slovenia (MoD) explicitly recognises the national defence industry base as a strategic asset, both for security and economic potential, particularly in fields where dual-use technologies support civilian and military applications.

A defining feature of the sector is its orientation toward a broad technology base. Many Slovenian companies operate at the intersection of civilian and defence innovation, especially in areas such as electronics, unmanned systems, advanced materials, sensors, and digital technologies. This approach aligns with the global shift towards dual-use capabilities and enables Slovenian firms to compete in niche markets despite their limited size. The state has increasingly supported this direction by investing in research and development, standardisation and certification processes, and by promoting stronger links with the European Defence Fund (EDF), the EU single market, and NATO capability-building initiatives.

Slovenian companies have also strengthened their export orientation, playing active roles in international supply chains and regularly participating in European and global defence exhibitions. A notable example is the SIDEC 2025 defence industry fair in Celje, where more than 110 Slovenian companies presented their products, demonstrating the breadth of the national ecosystem. On the procurement side, Slovenia's defence budget is growing towards NATO's 2% GDP target, which has revitalised modernisation programmes for the Slovenian Armed Forces and created opportunities for domestic contractors in maintenance, integration, and sub-system production.

Several capability clusters illustrate the sector's growing sophistication: unmanned aerial and ground platforms, weapon stations and turrets, sensor and electronic systems, ballistic protection and advanced textiles, defence logistics integration, cybersecurity, and system integration services. Although the sector remains small in absolute terms, it is increasingly characterised by innovation, export orientation, and cross-border cooperation, rather than the heavy standalone industrial platforms typical of the Yugoslav era.

Most defence companies are privately owned, with the state holding only minor stakes in a few firms and none majority-owned; some companies have foreign ownership (Interview 2). The state currently acts mainly as an R&D funder, investing about €23 million annually, which has supported several new products in recent years. The establishment of the Strategic Council for the Defence Industry opens the possibility for limited state participation – as a minority owner or through joint ventures – in strategically important companies or technologies to retain domestic know-how (Interviews 1, 2, 4).

In September 2025, the state established DOVOS d.o.o. as a fully state-owned enterprise, with initial capital of €3 million, to invest in high-technology defence and dual-use firms and support their integration into European and NATO supply chains, in line with the 2025 national defence industrial strategy (SDH, 2025). Public debate has stressed the need for strong transparency and parliamentary oversight (MMC, 2025).

Most Slovenian firms primarily produce civilian goods with defence applications, requiring special permits only for direct defence production. The defence industry generates around 40% higher value added than the national average (nearly €100,000 per employee) and has the potential to contribute up to 10% of GDP, comparable to the automotive or tourism sectors (Interviews 1, 2, 4).

Key Companies and Capability Clusters

Slovenia's defence industry consists of a diverse range of small and medium-sized firms specialising in high-value niches. Some of the most prominent are listed in Table 1.

Table 1

Most significant companies in the Slovenian defence industry

Company	Sector / Specialisation	Key Products / Capabilities)	Export Activity)	Revenue (2024)	Property	Employees (2024)
C-Astral d.o.o.	Unmanned Aircraft Systems (UAS)	Fixed-wing UAS, ISR systems, ground control stations	24% of income	5.26 mln	Private	24
Valhalla Turrets d.o.o.	Remote Weapon Stations	Remote weapon turrets, fire-control integration	Yes	€7.19 mln	Private	20-35
AREX d.o.o.	Weapons & Ammunition	Training ammo, links, weapon parts, pistols	Yes / 86% export share	€26.24 mln	Private (foreign owned)	152
MIL Sistemika d.o.o.	C4I / Military Software	Battlefield management systems, C2 platforms	International markets (Europe, Asia, and beyond)	€716,648.44	Private	6-8
Arctur d.o.o.	HPC / Digital Technologies	Cloud computing, HPC, data platforms	Yes	€4.49 mln	Private	48
Onedrone d.o.o.	UAS sales & integration	Drone integrations, export channels	Strong	€2.47 mln	Private	8-12
ARMAS d.o.o.	Defence Components / Steel	Components for weapons, armoured elements	Yes (85%)	€22 mln	Private	26
DAT CON d.o.o.	border surveillance, infrastructure protection and observation systems	Pan-Tilt systems, Multi-sensor Observation Systems, SWIR Cameras	More than 98%	€29.5 mln	Private	95
Guardiaris d.o.o.	advanced simulation and training solutions for defence, security, and related sectors.	Vehicle and Remote Weapon Station (RWS) simulators; Anti-armour / anti-tank weapon simulators	Data not available	€14.05 mln	Private	72
Biokoda d.o.o.	Advanced security software, encrypted communication	Security communication platform, NCSA certification for government use at NATO RESTRICTED level	53%	€1.12 mln	Private	12
Skylabs d.o.o.	miniaturised satellite avionics, on-board data handling systems and ground-segment solutions	Space technology	99%	€3.12 mln	Private	26

Source: Own elaboration based on data from SloExport. AJPES, Company Wall.

The companies presented in Table 1 were identified using a twofold approach. First, input from relevant institutional stakeholders was used to determine the organisations most commonly referenced. Second, the selection sought to ensure representation across different technological domains, including entities operating in areas such as space-related technologies and secure communications.

Defence-Industry Ecosystem and Clustering

GOIS (the Slovenian Defence Industry Cluster) is a voluntary and independent business-interest association (*gospodarsko interesno združenje*) that brings together companies, suppliers, and service providers active in the fields of defence, security, and protection. Its mission is to connect and coordinate Slovenian producers and service providers within the defence and security sector, promote cooperation among members, support industry development, and facilitate collaboration between industry, state institutions (such as the Ministry of Defence), and research and innovation bodies. As of November 2025, GOIS comprises 176 members. By comparison, in early 2024, the cluster had 58 members, meaning that its membership has tripled in less than two years (Interview 2). However, according to Mr Boštjan Skalar (Interview 2), "some companies have joined GOIS primarily in anticipation of immediate financial benefits." The Slovenian state currently invests around EUR 23 million annually in research and development supporting around 140 to 150 projects. Alongside traditional defence manufacturers, an increasing number of companies are active in areas such as protective shelters, monitoring of soldiers' physical condition, artificial intelligence, cybersecurity, protection of critical infrastructure, and food and water security. Consequently, the defence industry extends well beyond conventional weapons systems to encompass technologies such as drone and counter-drone solutions, autonomous vehicles, mobile outposts, and related capabilities (Interview 2).

According to GOIS and public descriptions of the Slovenian defence-industrial base, members cover a wide and diversified portfolio: personal protection gear, communication systems, optoelectronics, telecommunications; vehicles, vessels, aircraft, and vehicle upgrades (e.g., light armoured vehicles, special-purpose vehicles); engineering, logistics, maintenance, infrastructure support; research and development (R&D), innovation, manufacturing, testing, and marketing of defence and security technologies; dual-use technology and products serving both military and civilian markets (Slovenian Defence Industry Cluster Catalogue).

3. Foreign Investments and Participations

Foreign investments and participations in the Slovenian defence industrial ecosystem remain relatively modest, as Slovenia's strategic approach prioritises domestic ownership, technological sovereignty, and the strengthening of national supply chains. According to Interview 1, Slovenia's defence industry is increasingly attractive to highly advanced domestic technology companies in fields such as biotechnology, IT, and quantum technologies, which currently operate mainly in civilian markets but are showing strong interest in dual-use and defence-related activities. This shift reflects an inward-oriented innovation dynamic rather than reliance on foreign capital.

International participation is therefore channelled primarily through structured multinational frameworks (EDF, PESCO, EDA CapTechs, NATO programmes such as NATO DIANA, STO, and NIAG), where Slovenian companies gain access to foreign partners, specialised knowledge, and competitive funding without ceding ownership or control. Three Slovenian companies – PeK Automotive, Robotina, and Microbium – were selected for inclusion in the 2026 DIANA cohort from a pool of approximately 3,600 applicants, qualifying them to participate in NATO's Defence Innovation Accelerator programme. Slovenia's exceptional performance in EDF calls, where it ranked among the most successful states relative to population size in the first year of the programme, demonstrates that foreign participation is predominantly collaborative rather than investment-driven, meaning foreign actors are mainly involved through cooperation rather than ownership. In practice, this refers to partnerships such as joint projects, technology cooperation, subcontracting, or participation in supply chains, without significant foreign capital investment or equity stakes in domestic companies. The Ministry of Defence reinforces this model by issuing annual letters of support, co-financing projects accepted into EU schemes, and integrating domestic companies into multinational consortia, ensuring that external cooperation directly strengthens the domestic R&D base, accelerates capability development, and retains high-value expertise within Slovenia rather than transferring it abroad.

Slovenia has been extremely active in the EDF from the outset; in the first year, it was the most successful country in the tender (measured by the success rate of companies relative to the number of inhabitants) and continues its activities (Interview 1). Each year, the Ministry of Defence of the Republic of Slovenia organises national information days to present that year's call and specific topics, and to invite an expert from the European Commission to answer questions from the audience. Every year, the Ministry issues several letters of support as well as dedicated letters of cooperation to assist Slovenian companies with applications.

Slovenian companies and research institutions are invited to meetings of the Technological CapTechs within the European Defence Agency, where concrete RTI projects are developed. These meetings also provide excellent opportunities for networking and the creation of future consortia, especially for EDF calls, and ultimately for knowledge transfer within the European defence sector. Slovenian companies have already demonstrated that they are highly successful in European tenders, particularly the EDF.

4. Technological, Industrial and Cooperation Potential of Slovenia's Defence Sector

Slovenia's defence-industrial base is limited in scale but comparatively advanced in a set of specialised, high-technology, and predominantly dual-use niches. Rather than competing in large-scale production of heavy platforms or ammunition, Slovenia's comparative advantage lies in modular subsystems, software, sensors, unmanned systems, and simulation technologies that align closely with current European rearmament priorities. These capabilities position Slovenian companies as credible second-tier suppliers and research and development partners within multinational European consortia, rather than as stand-alone prime contractors.

Unmanned Systems and ISR

Slovenia has developed a mature ecosystem in unmanned aerial systems and intelligence, surveillance, and reconnaissance. C-Astral Aerospace is a vertically integrated manufacturer of NATO Class I tactical UAS, combining in-house airframes, EO/IR payloads, secure datalinks, and mission-planning software. Its systems are operationally proven with NATO and non-NATO users and are suitable for scaled production if demand increases. These platforms are directly relevant for artillery support, border surveillance, persistent ISR, and CBRN reconnaissance, and are well suited for inclusion in European Defence Fund (EDF) and PESCO system-of-systems projects. Smaller firms complement this ecosystem through platform integration, services, and niche applications.

C4I Software and Digital Battlefield Solutions

In command, control, and digitalisation, Mil Sistemika provides a comprehensive, NATO-interoperable C4I software suite spanning dismounted soldiers, vehicle platforms, and higher-level headquarters. These software-centric solutions support blue-force tracking, sensor-to-shooter integration, and data fusion across all echelons. Their modularity and openness make them highly scalable and attractive to Western European primes developing digitised force structures, integrated fires, and multi-domain command and control systems, particularly in programmes requiring rapid prototyping and interoperability among heterogeneous national systems. Biokoda d.o.o. develops advanced security software, providing an encrypted communication platform certified by the NCSA for government use at the NATO RESTRICTED level.

Remote Weapon Stations, SHORAD, and Counter-UAS Fire Platforms

Valhalla Turrets develops remotely controlled weapon stations and turrets in the 25–30 mm class, optimised for short-range air defence, counter-drone, and multi-role applications. Procurement and testing by the Slovenian Armed Forces, combined with Ministry of Defence co-financing, indicate a maturing industrial and certification base. Existing cooperation with foreign partners, including integration on manned and unmanned platforms, demonstrates strong potential for embedding Slovenian turrets within wider European SHORAD, convoy protection, and manoeuvre air-defence programmes.

Sensors, Surveillance, and Border-Security Systems

DAT-CON contributes advanced EO/IR sensors, radar-integrated surveillance systems, and the LYNX counter-UAS solution for border, infrastructure, and airspace protection. These systems are operationally validated and have already entered cross-border co-production arrangements, illustrating Slovenia's capacity for transnational industrial teaming. Such capabilities directly support EU priorities in external border management, critical infrastructure protection, and layered counter-drone architectures.

Simulation, Training, Digital Twins, and HPC

Simulation and synthetic training environments represent another area of comparative advantage. Companies such as Guardiaris and Arctur provide customised military simulators, digital twins, high-performance computing, and advanced data-processing services. These capabilities are essential enablers for rapid rearmament, as they shorten training cycles, support certification of new systems, and enable live-virtual-constructive training concepts. Slovenian firms are already embedded in EU- and MoD-funded projects that link simulation, UAS, and C4I development, reinforcing their value as partners for European readiness and training initiatives. In addition, the Jožef Stefan Institute contributes strong research capabilities in artificial intelligence and digital-twinning technologies, further strengthening the national ecosystem.

Precision Engineering, Small Arms, and Protective Equipment

Additional strengths include precision engineering, small-arms components, and protective equipment. Arex Defense is an established supplier of pistols and ammunition belt links to European NATO members, while companies within the GOIS cluster contribute protective textiles, uniforms, and personal protective equipment. These sectors offer opportunities to strengthen and diversify European supply chains, particularly where smaller production runs, flexibility, and customisation are required.

Cooperation Framework and International Integration

Foreign ownership in Slovenia's defence sector remains limited, reflecting a strategic preference for national ownership and technological autonomy. Internationalisation occurs mainly through structured cooperation mechanisms such as the EDF, PESCO, EDA Capability Technology

Groups, and NATO innovation and research programmes. Slovenia has performed strongly in EDF calls relative to its size, supported by active Ministry of Defence co-financing and facilitation. These frameworks provide access to funding, certification, and standardisation while ensuring that intellectual property and high-value expertise remain embedded in the national ecosystem.

5. Country-Specific Challenges for Slovenia

Scepticism towards NATO

Slovenian attitudes towards NATO have evolved from initial ambivalence to stable majority support, but with a persistent critical minority. Early polls showed a divided public, but support gradually consolidated, culminating in the 2003 accession referendum, where a clear majority voted in favour – helped in part by simultaneous EU membership voting.

Debates about NATO membership often relate to defence expenditures. Slovenian public attitudes towards defence expenditure remain cautious, and this fiscal scepticism is closely linked to a broader ambivalence towards NATO's requirements and burden-sharing expectations. While support for NATO membership itself is relatively high (around 70–75% in recent 2025 polls), willingness to increase defence spending is consistently lower. A July 2025 Vox populi survey (Dnevnik.si, 2025) found that 65.7% of respondents opposed holding a referendum on raising defence expenditure, indicating that the public does not perceive higher spending as a priority and wishes to avoid political mobilisation on this issue. At the same time, only a minority supports reaching NATO's 2%-of-GDP benchmark, a pattern visible in longitudinal Slovensko javno mnenje (SJM) surveys, where defence ranks among the least preferred public-budget categories. This tension produces a characteristic Slovenian pattern: support for remaining in NATO as a security umbrella, paired with reluctance to assume the financial commitments associated with alliance credibility. Public scepticism towards higher military spending therefore reinforces a subtler form of scepticism towards NATO itself, most likely not so much a rejection of membership, but resistance to the alliance's expectations regarding capability development, investment, and long-term burden sharing.

Since the beginning of the war in Ukraine, Slovenia's political discourse on security and defence has undergone a notable transformation. For the first time in many years, almost the entire political spectrum – spanning both the previous and the current government – explicitly situates Slovenia within the Western security community and endorses assistance to Ukraine. Defence issues have gained significantly greater public and political visibility, accompanied by clearer affirmations of Slovenia's commitment to NATO and its Western partners. At the same time, there is a growing recognition that credible national defence requires more than symbolic contributions; it demands the development of substantive national capabilities. Several previously persistent but unrealistic assumptions – such as the belief that Slovenia could remain on the margins of major European and transatlantic security dynamics – have diminished. Nevertheless, the political discourse is still unevenly structured and often lacks a coherent national strategic framework.

Conclusion

Even if NATO defence spending targets are fully implemented, Slovenia is unlikely to become a producer of heavy weapon systems or mass ammunition.

Slovenia's most realistic and strategically valuable role lies in high-technology, modular, and software-centric niches that align closely with current European rearmament priorities. By acting as a specialised supplier and R&D partner within multinational EU and NATO consortia and leveraging dual-use technologies that also support civil protection and climate-related crisis response, Slovenia can make a disproportionate contribution to European defence capabilities while maintaining technological autonomy and a resilient national industrial base.

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