



GO TO MARKET



CEE

Readiness Report

Light-Touch Diagnostics

Client: MilCom- Network For
Defence

Date: July 2025



“Small- and medium-sized enterprises are key actors in Europe’s defence industry”

European Parliament, A9-0161/2023 report

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1. Introduction: situational awareness

Client: MilCom- Network For Defence

Headquarters: Turkey

Company Life-cycle phase: Post-Seed Startup, Expansion
Candidate

Date: July 2025

Overview

MilCom is a Turkey-based deeptech venture specializing in secure wireless communication systems for defence and critical infrastructure. With a strong engineering team and growing customer traction in the domestic market, the company is positioned for strategic international expansion.

€7.1M

Seed Round 2025

Operational capabilities

Core Offering: Tactical LTE/5G communication nodes with dual-use applicability

Production Facility: Fully operational in Turkey, compliant with ISO standards

EU Expansion Intent: Open to establishing a modular production or assembly hub in the EU for proximity to key NATO/EU tenders and supply chains

MilCom lacks local brand presence and formal representation in EU/NATO procurement ecosystems but has a technically promising product and strong industrial credibility.

2. Market outlook

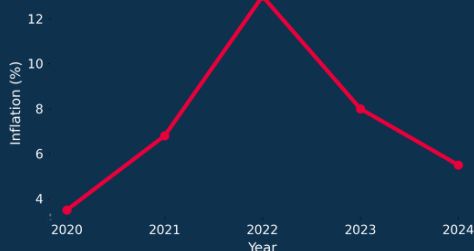
2.1 CEE economic snapshot: 2020–2024

Despite global slowdowns, the CEE region averaged **3.5%** annual GDP growth (2020–2024), with Poland and Romania recording growth rates at **4–5%** (Eurostat, 2024).

The region outpaced the EU-27 average (1.8%) and is projected to sustain **3%+ growth through 2026**.

3%+
growth
though
2026

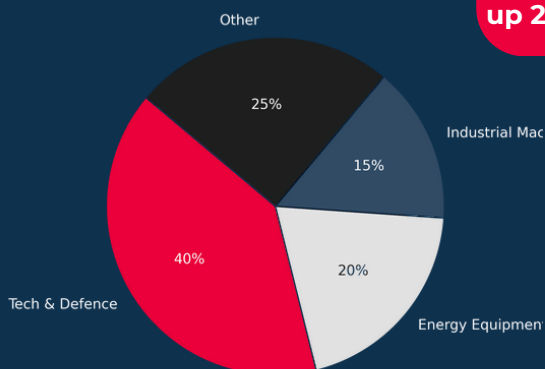
CEE Inflation Trends (2020–2024)



Inflation peaked at **12–15%** in 2022, but normalized to **5–7%** by late **2024** across most markets (IMF, 2024). **Currency stability has improved**, with the Polish zloty and Romanian leu regaining pre-2022 levels.

Total imports to CEE exceeded **€1.1 trillion in 2023**, up **28% from 2020** (Eurostat). Technology, industrial machinery, energy equipment, and defence-related components accounted for over **40%** of import value.

CEE Imports by Sector - 2023



**CEE imports
€1.1 trillion in 2023
up 28% from 2020**

2.2 CEE: macro & micro overview

CEE countries differ in growth rates, defence priorities, and technological depth — yet each presents a distinct opportunity for dual-use ventures. This overview maps out the region's strategic footprint and key sectoral champions.

POLAND

GDP Growth

3.3–3.5%

Defence Spend (% GDP)

~4.7%

Innovation Index (EU)

High (~15th)

Dual-Use Ecosystem

Extensive (primes, NSF, R&D platforms)

ROMANIA

GDP Growth

~1.6%

Defence Spend (% GDP)

~2.2% (rising)

Innovation Index (EU)

Moderate

Dual-Use Ecosystem

Emerging cyber & dual-use cluster

CZECHIA

GDP Growth

1.9%

Defence Spend (% GDP)

~2.1%

Innovation Index (EU)

Moderate-High

Dual-Use Ecosystem

Engineering-heavy base, deep-tech startups

HUNGARY

GDP Growth

~1.65%

Defence Spend (% GDP)

~1.9%

Innovation Index (EU)

Moderate

Dual-Use Ecosystem

Dual-use tech in electronics, AI, mobility

GDP Growth

3.3–3.5%

Defence Spend (% GDP)

~4.7%

BALTICS

Innovation Index (EU)

Very High (top quartile)

Dual-Use Ecosystem

Emerging cyber & dual-use cluster

Analysis based on Eurostat, NATO, EDA, and national sources (2024). Full references available in bibliography.

2.3 CEE sectoral expansion trends: 2020–2026

CEE's strategic transformation is accelerating with four core sectors showing strong demand, budget growth, and international procurement interest.

DEFENCE & NATIONAL SECURITY

Drivers: NATO modernization, regional threats, and national strategic autonomy goals

+45%

Imports of defence hardware, ISR systems, technologies rose by 45% (2020–2023).

€29B

Estimated value of defence contracts to be issued by Poland by 2026 (NATO DI, EDA).

€8.5B

Value of defence contracts awarded in Poland since 2022 (NATO DI, EDA).

12-20%

Annual increase in defence budgets among NATO-aligned states.

CRITICAL INFRASTRUCTURE & CYBERSECURITY

Drivers: Grid modernization, ICS/OT protection, digital infrastructure

+35%

Imports of turbines, sensors, heavy equipment grew.

€7.2B

Cybersecurity market in CEE forecasted to reach by 2026.

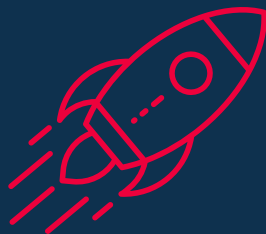
€136B

Public funding allocated to renewables in CEE (2022-26)

€930M

Located in 2024 to boost Poland's cyber and infrastructure resilience.

Full references available in bibliography.



DUAL-USE & DEEP TECH

Drivers: EU innovation funding, civil-military fusion, space & AI focus

€11B

Public and EU funding dedicated to quantum, AI, and space technologies over the past five years

€15B

VC funding raised in 2024 by European deep-tech startups, including dual-use ventures

€5.2B

Investment in European defence-tech startups, record high deal volume in 2024

€57.3B

EU dual-use exports in 2022 (49% year over year growth)

B2B TECHNOLOGY & SAAS SERVICES

Drivers: Digital transformation, cloud migration, compliance requirements

+25%

SaaS imports have grown by 25% per year (2021-2024)

+20%

ICT now accounts for goods imports in Baltics & Poland.

€9.75B

Size of Poland's IT services sector in 2024 (software, consulting, compliance).

€2 B

Total market cap of 10 selected CEE SaaS companies: vestbee.com

Full references available in bibliography.

3. Opportunity map & competition

Market demand:

- **Government:** secure field & mobile comms, battlefield network solutions
- **Airports/Ports:** mission-critical LTE/5G comms: Drones threat detections
- **Critical infrastructure:** backup and encrypted comms
- **Civilian Dual-Use:** emergency services, energy grid maintenance

Top competitors (local + global)

Company	Segment	Origin	Presence
WB Group	Defence Comms	Poland	CEE
Airbus Secure Comms	Tactical Networks	France	Worldwide/NATO - several sites in PL
Rohde & Schwarz	Spectrum mgmt	Germany	DACH/NATO- presence in PL
Advanced Protection Systems	Radars/Sky Drone systems	Poland	CEE

Opportunity:



- A.** Niche for mid-size, agile player offering configurable, secure, dual-use wireless systems.
- B.** Partnerships: tenders and/or system integrator

4. PESTLE summary

POLITICAL

NATO:

Strong integration;
defence + critical infra
prioritized

Geopolitics:

Dual-Use Policy Climate
(EDF & Digital Europe
Programme)

ECONOMIC

GDP Rate:

Total CEE: \$2.3 trillion

Spend on Defence:

up to 6% of GDP on
infrastructure & defence by
2025 onwards

SOCIAL

Population:

Total CEE: approx.
87M

Expertise:

Skilled engineering
workforce, strong digital
literacy

TECH

5G:

High Interest, modern
infra, private networks

Space:

low-Earth orbit capabilities
for redundant comms, with
emerging players such as
ICEYE and Sybilla Tech.

LEGAL

Regulated sectors:

Telecom

Procurement:

Tender Compliance
Needed, ISO standards
relevant

ENVIRONMENT

Sustainability:

Push for ESG, 17 SDG-
low carbon prioritised

Other:

A low-radiation comms in
civil sector is a standard

5. Entry barriers, risks & priorities



Risks & Barriers:



Tendering Eligibility:
Need for local entity or EU-based partner



Perception gaps:
Non-EU firms may need local PA/PR support.



GDPR/Export Controls:
Civilian + dual-use exports must meet EU norms



Local:
Buyer trust and long-term presence critical

Go-to-Market Priorities

Area:	Recommendation:
Cert. & Legal	Legal entity, local VAT: start EU compliance
Representation	Local Agent: BD partner in Poland & Romania
Messaging	Narrative EU alignment + sovereignty
Partnerships	Engage systems integrators & NATO primes
Pilot Planning	Demo for MoDs & emergency comms use
PA/Lobbying	Public affairs for grants, tenders, visibility

6. G2M readiness scorecard

Millcom - Network for Defence

Category:	RAG:	Notes:
Product-Market Fit	●	Proven use in defence/security; EU relevance strong
Cert & Compliance	●	NATO-aligned, but EU/CE mark + local specs missing
Public Affairs Capacity	●	No established presence in EU/NATO public affairs or stakeholder engagement
Local Buyer Relationships	●	No known presence in Poland, Romania, Baltics
GTM/BD Resources	●	Internal capacity but no regional BD or sales
Legal Entity / Tender Ready	●	Cannot participate in tenders yet
Production Scalability	●	EU production & Distribution planned
Strategic Partnerships	●	Need to build alliances with integrators, primes, or local VARs

- None
- Early Stage/Partial
- Strong

Overall Readiness Score: 2.5 / 7 ~~Go/No Go~~

Proceed with focus on pre-entry actions recommended:

- Detailed Go 2 Market Strategy with deep analysis and clear Roadmap
- Appoint a local advisor / BD
- Certification audit/transfer
- Localise (pitch, media, legal entity)
- Align the Production Facility establishment with Go 2 Market and BusDev operations

7. Basic cost overview

Millcom - network for defence

Phase:	Details:	Timeline:	Cost(€):
Explore (0-2 months)	Market Research/ Pilot Testing	2-4 weeks	3k
	Cert Audits	2-8 weeks	5-50k
	Expansion Strategy: Facility Allocations (Prod & DCs)	4-8 weeks	5-12k
Enter (2-8 months)	G2M Strategy & Roadmap	2-4 weeks	5-7k
	Market Activation Retainer	--	3-5k / monthly
	Facility establishment	1-6 months	varies
Operate (8-24 months)	Business Development Retainer	--	3.5-6k / monthly
	PMO 360 Retainer (Local Legal & Admin)		0.5-1.5k / monthly
Scale	Strategic Expansion Roadmap	--	
	M&A / Exit Strategy and Execution		

Comprehensive phases include:

- Growth strategy, execution, and embedded ops (marketing and business development)
- Sales automation and tools
- Sales enablement (localized materials)
- Tender readiness and scouting
- Finance and admin operations
- Legal, contracts and risk management
- Public affairs and lobbying
- Pilot testing and strategic intros
- Channel partner development

Let's explore your CEE growth plan.

Let's explore what's possible together.



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