Estonian Defence and Aerospace Industry Association

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Ukrainian war impact on innovation within the Estonian Defense Industry

ESTONIAN DEFENCE & AEROSPACE INDUSTRY

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Agenda

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- Estonian Defence and Aerospace Industry Association
- Innovation processes during peace and war time
- Dual use of technology
- Ukrainian references
- Conclusion
- Q/A

Estonian Defence and Aerospace Industry Association (EDIA)

MISSION:

Our mission is to support Estonia's **defense capability** and create better opportunities for **our members within the defence industry markets**.

- EDIA was **founded** in **2009.**
- **130 members** - 100% privately held local SME's. Mostly early-stage or growth stage companies.
- Total revenue around **200Meur.**

Capabilities represented in EDIA

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Border Security & Surveillance

Communication Systems

Cyber Defence & smart software

Electronic Warfare & C-UAS Systems

Military Medicine

Military Vehicles & Armament & MRO

Personal Equipment

Protection Systems

Robotics & automation

Shipbuilding

Simulation & Training Systems

Weapon Systems

Sensor technologies

Space technologies

- **Innovation is the <u>creating</u> and use of new <u>ideas</u> or <u>methods</u>**

Innovation process (war vs peacetime)

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Peacetime	Wartime
FullHD autonomy and empowerment for teams	Command & control
Long term investments	Short term wins
Pay off debt and leave things better than you found them	Whatever it takes
All teams have their own lanes, metrics, missions and dependencies are minimized	All-hands-on-deck to shoot at a common target
Research, analysis, investing in learning	Instinct and action
Big picture, zoomed out	Ultra-focused, zoomed in
Consensus	Mandate and fiat

"Peacetime"	"Wartime"
Little to no pressure	Existential pressure
Quality is essential	Speed is essential
Work-life-balance	Work-life-what?

Dual- use technology

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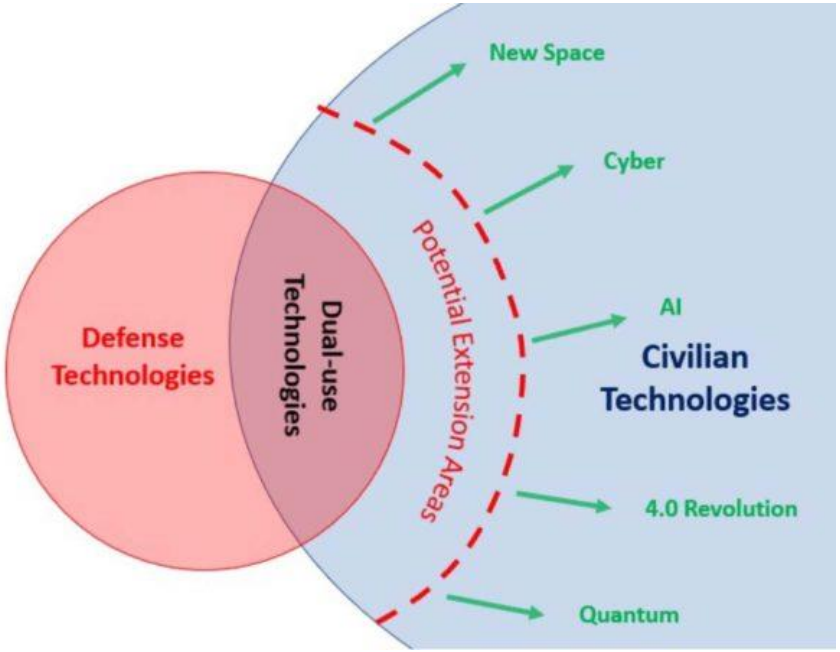

- In Ukraine innovation has adopted civilian capabilities for supporting combat activity.

Our production

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- AI and machines learning algorithms to detect, recognise, and target a variety of drones
- Creates software where an abundance of data transforms into actionable knowledge
- AI-powered surveillance solutions
- Operational support in incident handling & cyber operations
- Unmanned platforms
- Drone detection and jammers
- Support for a wide range of surveillance devices (radars, cameras and other sensors)

Ukrainian war references

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Russia-based Centre for Analysis of Strategies and Technologies said last week it was offering a reward of up to 1 million rubles ($16,330) for the Tracked Hybrid Modular Infantry System unmanned ground vehicle, or THeMIS.

https://defence-blog.com/russia-offers-1-million-rubles-for-capture-of-estonian-made-unmanned-ground-vehicle/

German arms manufacturer Rheinmetall will send several dozen million euros worth of Estonian company Defsecintel's surveillance devices to Ukraine.

https://www.reuters.com/business/aerospace-defense/rheinmetall-supplies-ukraine-with-more-drone-reconnaissance-systems-2023-10-05/

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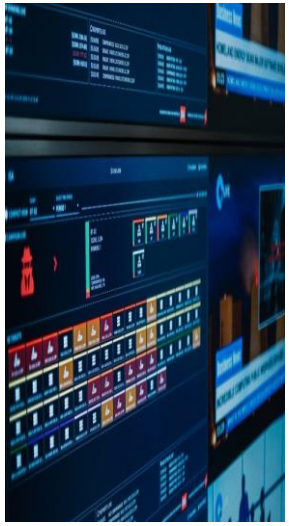

Conclusion

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- Innovation has accelerated due to the War in Ukraine
- Innovation processes have become more efficient
- Time has great value
- Competition fight between means and counter means
- We have to work harder, create more and provide new solutions

EAS
Enterprise Estonia

Euroopa Liit
Euroopa
Regionaalarengu Fond

Eesti
tuleviku heaks

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