



KONGSBERG

# Disruption in defence industry – How to adapt to a new era of warfare

Kongsberg 3/6-25





LTM Q1 25

# KONGSBERG size and scope



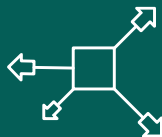
**14,808**  
Employees



**40**  
Countries

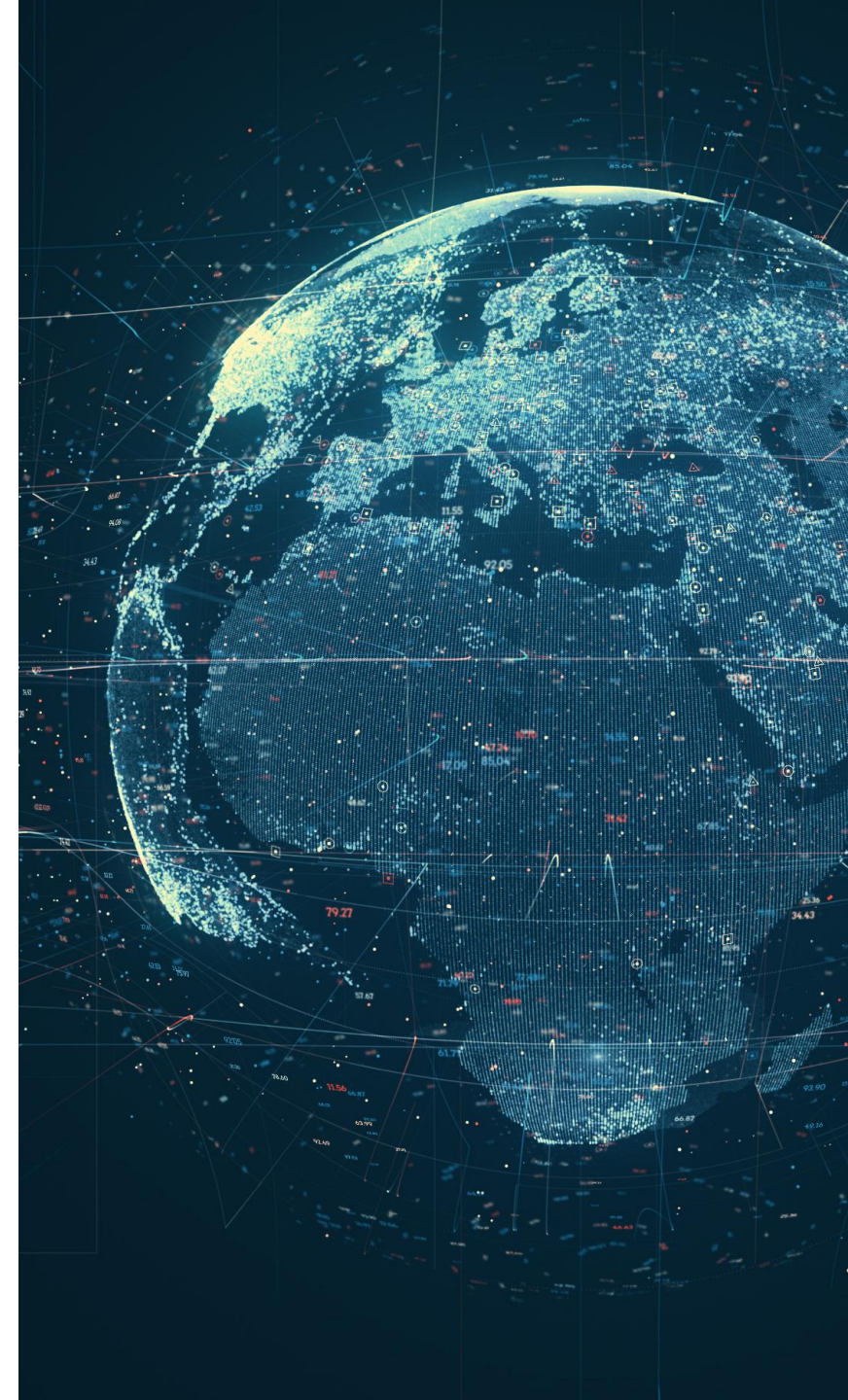


**\$4.8 bn**  
Revenues

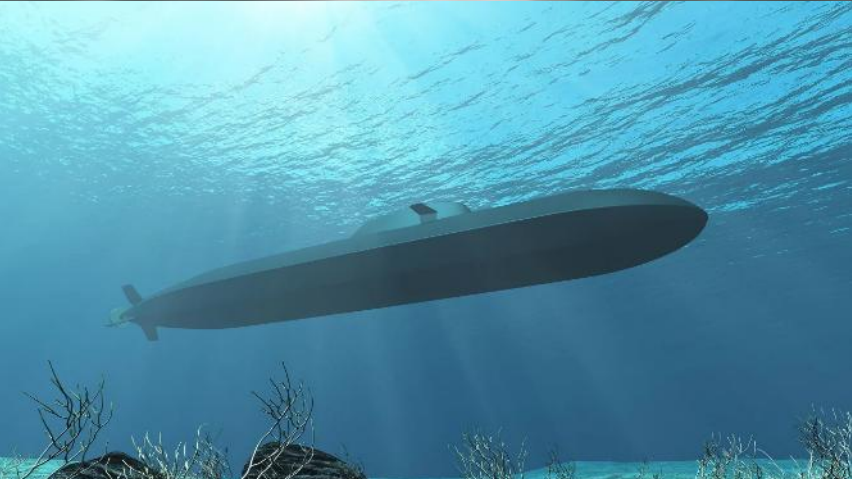


**3**  
Business areas

See Statement of Proprietary information







 KONGSBERG









# Ukrainian Strike mission



See Statement of Proprietary information

# Disruptive warfare concepts



=





# Disruptive warfare concepts

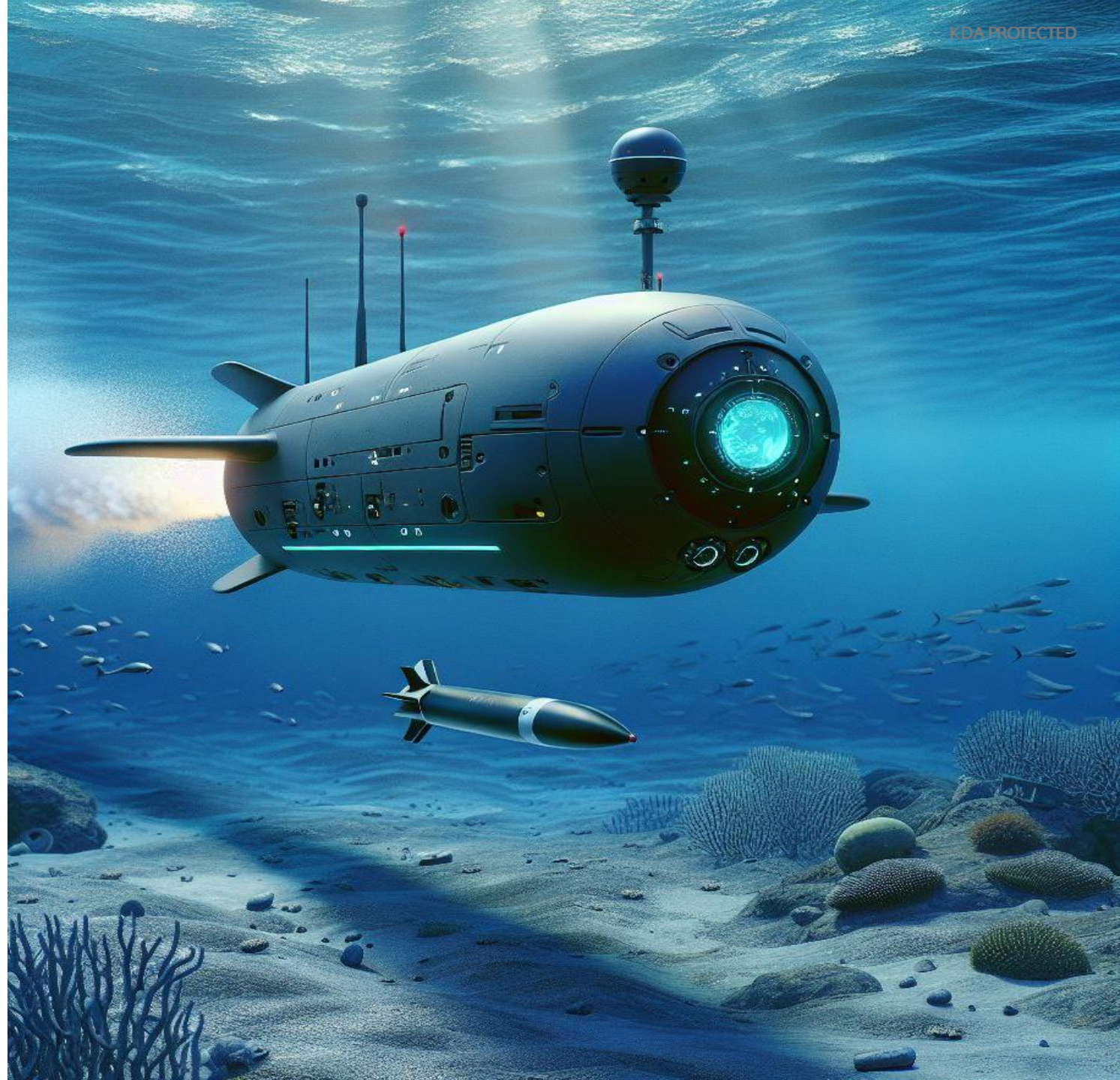






**I want to turn the Taiwan Strait  
into an unmanned hellscape  
using a number of classified  
capabilities**

*USINDOPACOM, Adm Paparo*





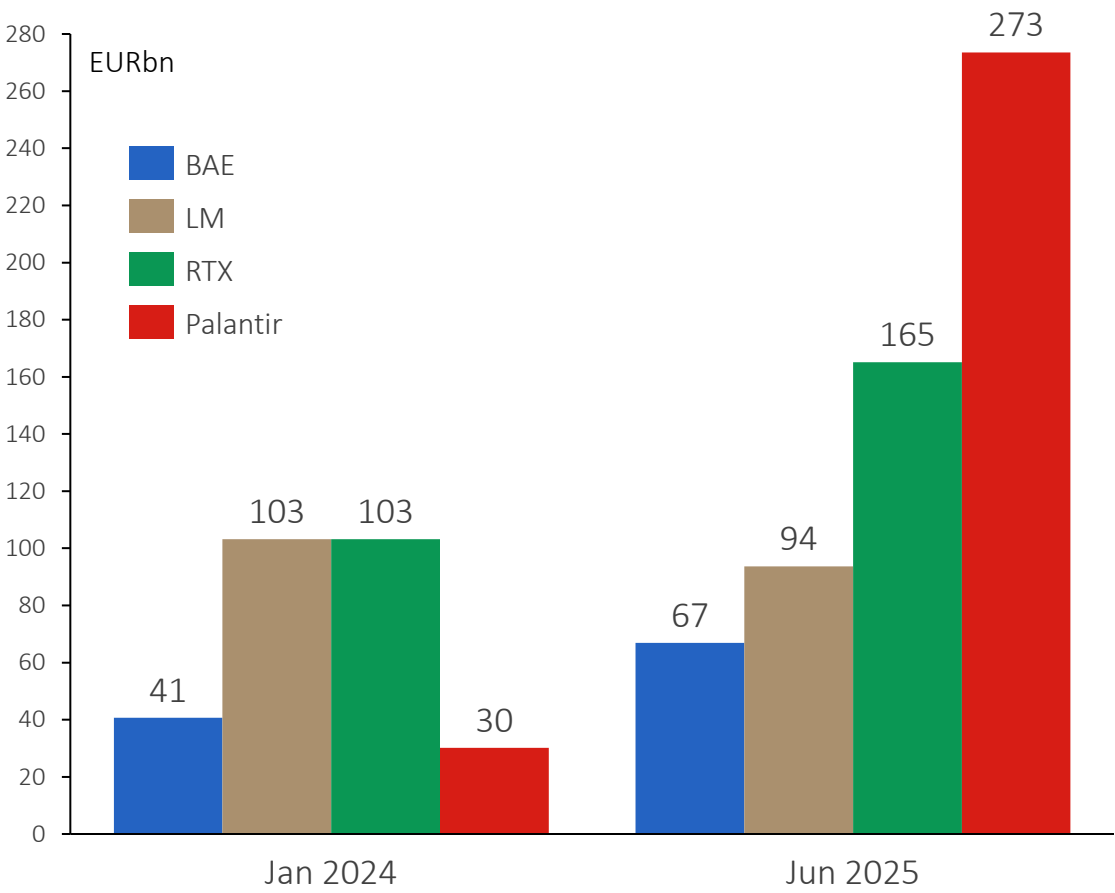
# Rapid innovation cycles





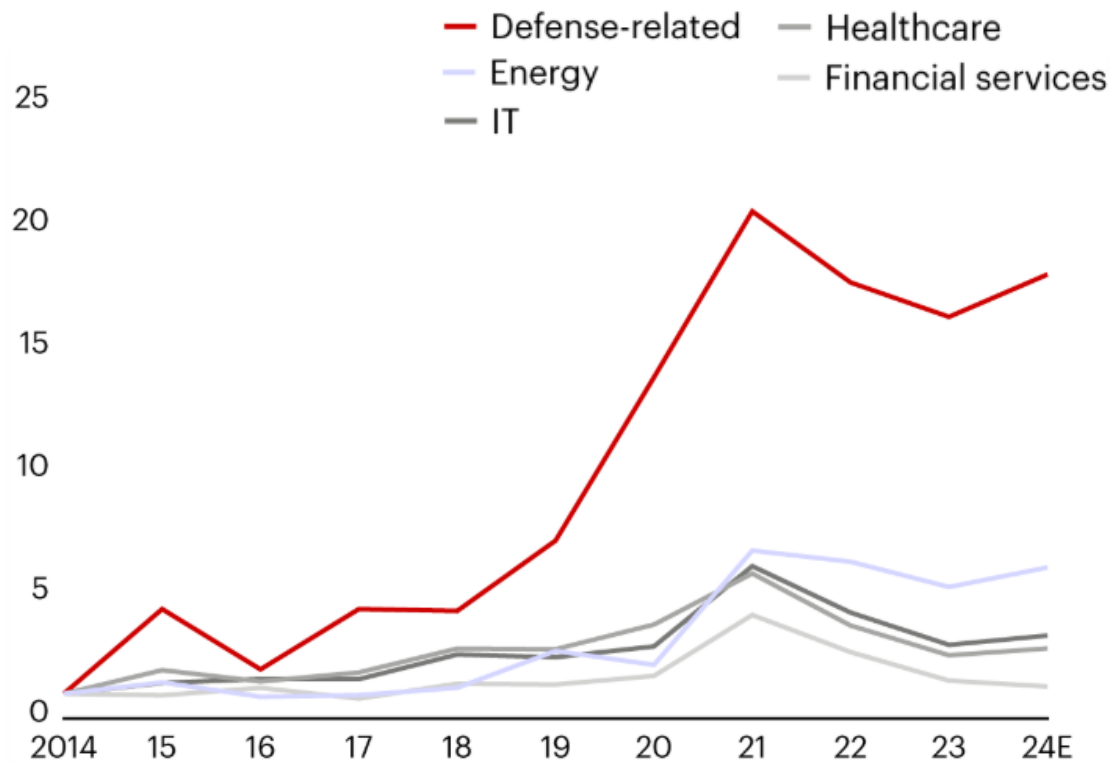
# New capital is changing the defence industry landscape

Development in market cap



Global venture capital deal value, indexed to 2014 levels

Source: Bain Capital



Source: S&P Global market intelligence, Factset



# Two distinct innovation labs



No boundaries in Ukraine

- Existential warfare motivation
- Limited red tape processes
- Limited workforce restrictions
- Limited test & qualification

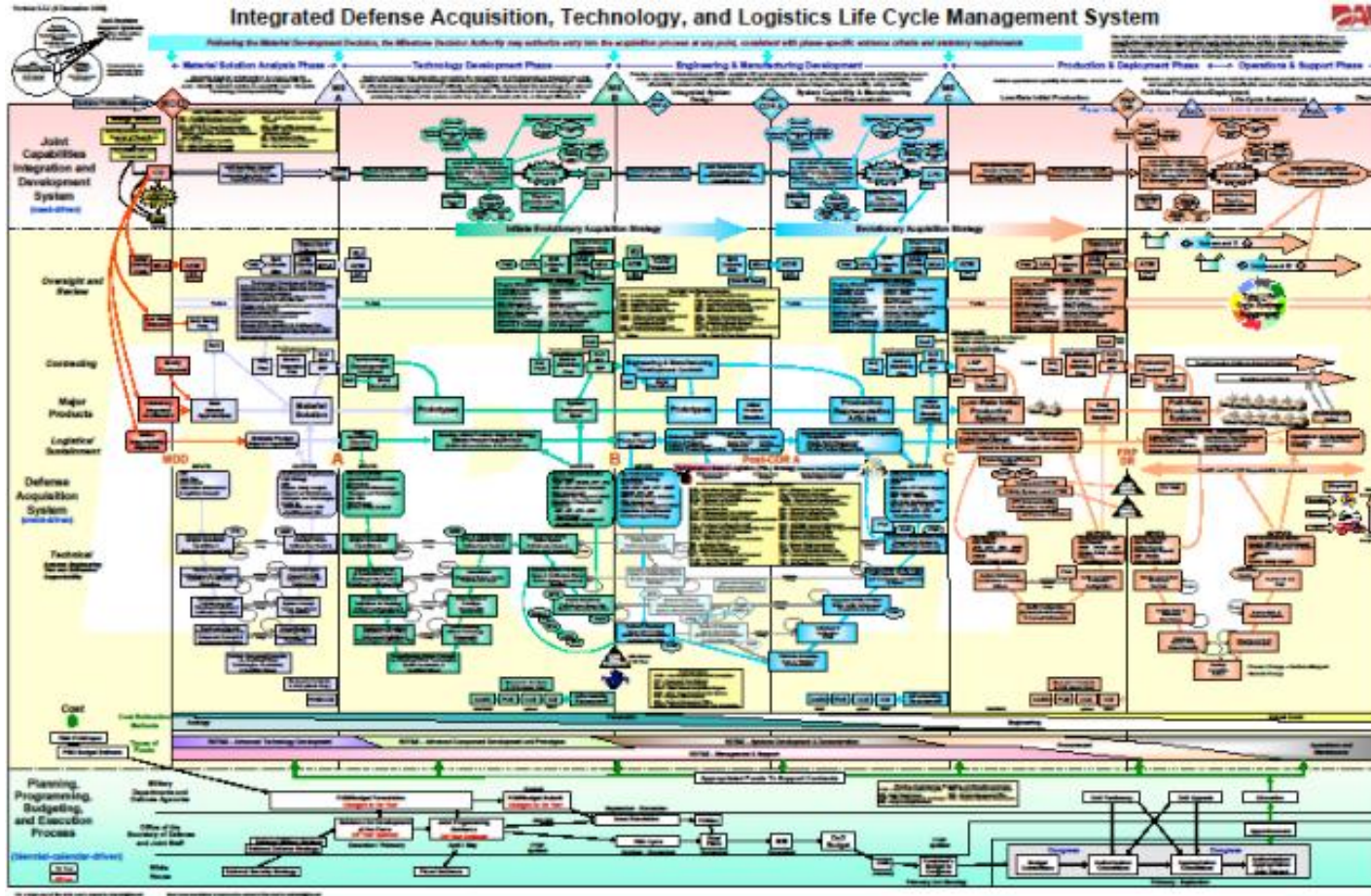


Unlocking big capital in USA

- World class Technology base
- Access to massive risk capital
- Innovation appetite



# But acquisition processes remains....



- Procurement process
  - Defining scope of delivery
  - Negotiate
  - Test and qualify
- How to deal with fluent changes?





KONGSBERG

**Thank you**