Virtual & Mixed Reality innovation: Enabling a 10X productivity leap in Simulation & Training VR

XR

Feb 26, 2020 Washington DC seppo.aaltonen@varjo.com Head of Sales Varjo Technologies

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#### AR/VR/MR/XR has long promised to change the world

- Background: Envisioned in the 1960s, developed in the 1980s/ 1990s/2000s
- The concept thrilled potential users, **but ultimately** disappointed:
  - Fidelity (resolution, scene content)
  - Component and development costs
  - o Human Interface
  - $\circ$   $\;$  Weight, comfort, and hygiene
  - Connectivity
  - Simulator Sickness (discomfort)



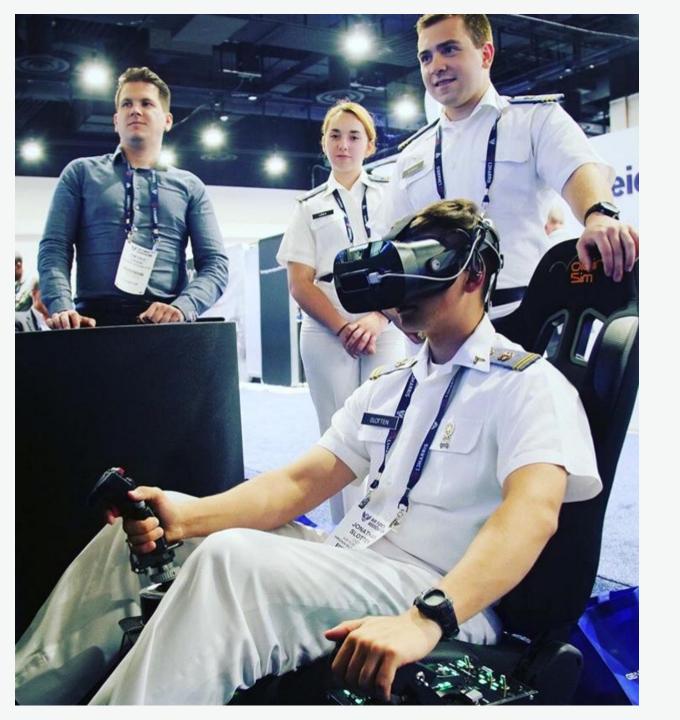


# Now professional VR & XR technology innovation has reached new performance levels...



## "It's a new standard in training and simulation."

Tobias Olsson - SAAB, Stockholm



VR/XR is delivering strong business case benefits in training & simulation

- Support training that cannot be performed or with today's simulators
- Portable deploy training to the point of need
- Drive massive cost reduction
- Increase training velocity
- Optimize student engagement
- Increase value of part-task simulators by provision of full field of view, immersive visuals using MR technology

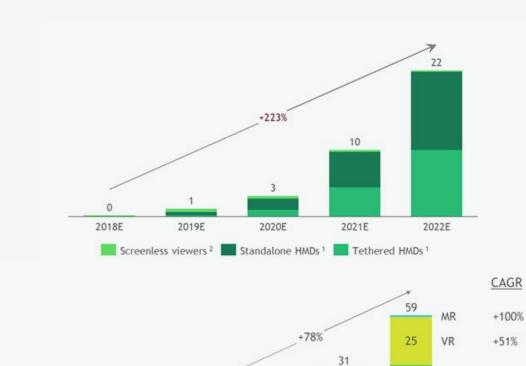
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#### ...resulting in explosive VR&XR market growth

AR

2022E

+130%



17

2020E

2021E

10

2019E

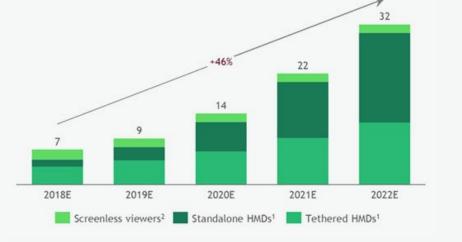
+64%

2017

2016

6

2018E



1. Head-mounted display, tethered HMDs connect to a computing device, standalone products have the necessary computing power integrated 2. Screenless viewers, which strap a smartphone screen to a person's face Source: IDC,Worldwide Augmented and Virtual Reality Hardware Forecast, 2019-2023, 2019, BCG analysis

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#### VR/XR Pilot training cases









#### Maintenance training VR/XR use cases





#### Advanced equipment VR/XR training use cases



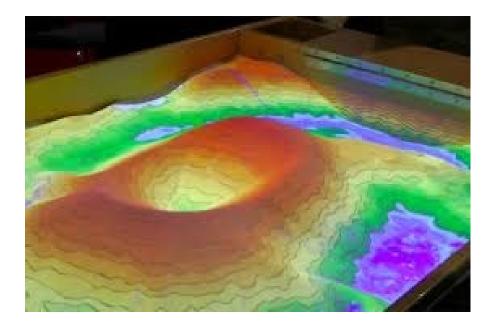






#### Mission planning, control & debrief VR/XR use cases





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#### Live virtual constructive VR/XR use cases





### Thank you!

#### Questions ?



