



DAVID PATERSON

The Military Market, Requirements & New 4C Clients and Solutions

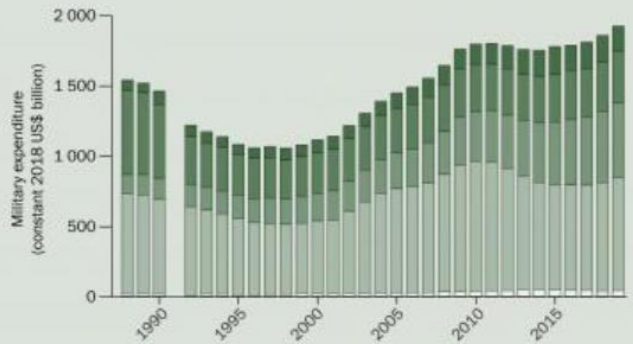
Military Training



The Military market is picking up fast. The large scale use of “training as operations” in Europe (NATO as well as individual countries) and the Pacific, combined with continuing small scale operations in theatres of operation around the world, is opening up unprecedented opportunities to support the cost efficient production and maintenance of Force Readiness.

Military Training – Increasing Budgets

WORLD MILITARY EXPENDITURE, BY REGION, 1988-2019



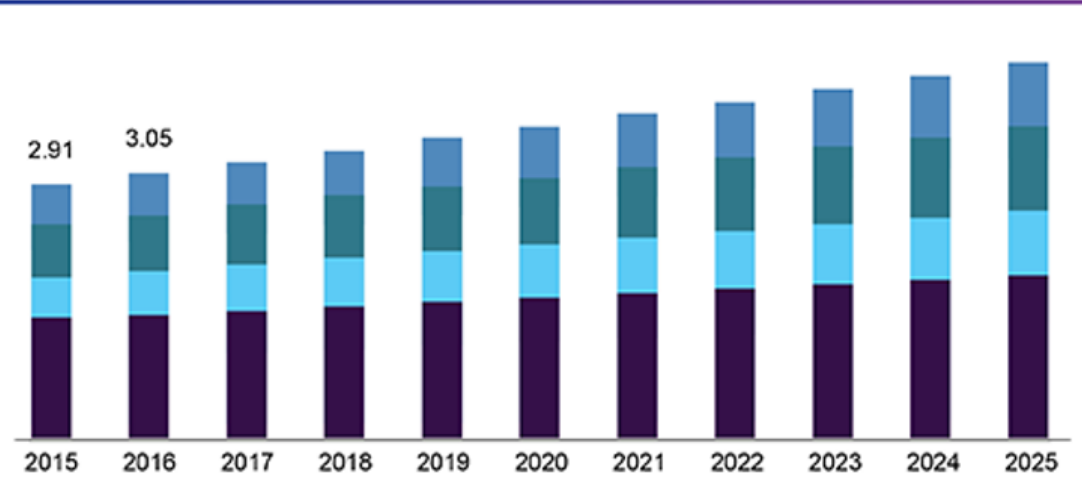
Africa
 Americas
 Asia and Oceania
 Europe
 Middle East

Notes: The absence of data for the Soviet Union in 1991 means that no total can be calculated for that year. Rough estimates for the Middle East are included in the world totals for 2015-19.

Source: SIPRI Military Expenditure Database, Apr. 2020.

www.sipri.org
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U.S. military simulation and virtual training market size, by platform, 2015 - 2025 (USD Billion)



Flight Simulation
 Vehicle Simulation
 Battlefield Simulation
 Virtual Boot Camp

www.grandviewresearch.com

Senior Military Views (1)



GENERAL MARK MILLEY
Chairman of the US Joint
Chiefs of Staff
National Defense University
Class of 2020 – Jul 20

“We are in the return of great power competition and we need to remain in competition and prevent the return of great power war.”

“Our contribution as a military to that end state is a **highly capable, agile and ready joint force**. We have taken significant steps to **increase investment** in the current readiness in order to deter and defend against today’s threats while modernizing our force through innovative concept development, **advanced technology and new capabilities** for the security challenges of tomorrow.”

Senior Military Views (2)



GENERAL SIR NICK CARTER
UK Chief of Defence Staff
UK Integrated Operating
Concept – 30 Sep 20

“Engaged and forward deployed – armed forces much more in use rather than dedicated solely for contingency - with training and exercising being delivered as operations.”

“Premium on building alliances and **improving interoperability** to make us more ‘allied by design’ and thus able to burden share more productively”

“We cannot afford any longer to operate in silos – we have to be integrated: with allies as I have described, across Government, as a national enterprise, but particularly across the military instrument. **Effective integration of maritime, land, air, space and cyber achieves a multi-Domain effect** that adds up to far more than simply the sum of the parts”

Military Training Trends

'TRAINING AS AN ENGINE FOR CHANGE'



Focus on Capabilities rather than Systems



Networked & distributed planning and execution



Back to Basics / Mapping Progressions



TAUF / Real world warfighting scenarios



Training & Ops continuum
Combat & Mission ready



LVC blend and simulation wrap supporting most training



Measuring effect through contextualised & objective evidence



Integrated, Combined & Joint For multi domain effect



Cross-Nation Collaboration vs. Increased Protectionism



Secure cloud & Local instances

FROM DATA COLLECTION
TO DATA DRIVEN

FROM SPECIALISTS TO
GENERALISTS

FROM MANDRAULIC
TO AUTOMATION

FROM SILOS TO
INTEGRATED SOLUTIONS

Our Proposition

Ensuring Allied Forces Readiness through measurable, efficient and effective training management



CUSTOMER
SOLUTIONS

DOMAIN
SOLUTIONS

DOMAIN/CORE
APPS/COMPONENTS/
INTEGRATIONS

DOMAIN
SERVICES



MILITARY TRAINING
MANAGEMENT

MANAGED SERVICE

On site support to training Design,
Delivery and Exploitation

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IMPLEMENTATION

Design and Configuration of
Exonaut to meet customer
solutions, testing and training

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INTEGRATION

Integration with Simulations,
EXCON toolsets, C2 Systems and
authoritative data sets

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EXTENDED SUPPORT

Additional reachback support to
technical expertise

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CUSTOMISATION

Further customisations of Exonaut
To meet specific client specifications
and requirements

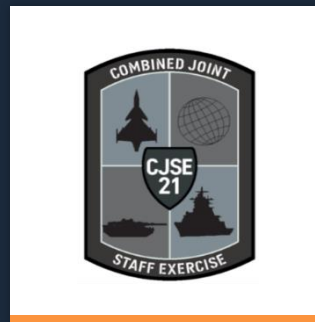
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FINANCED DEVELOPMENT

Accelerated development of
functionality out of the 4C
development cycle

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4C Nordics - Military Development in 2019/2020



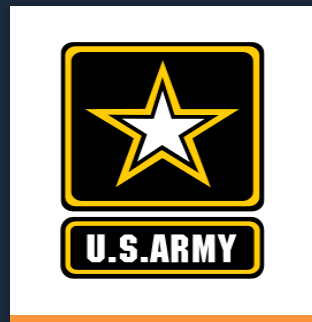
4C International - Military Development in 2019/2020



4C International - Military Development in 2019/2020



4C NA - Military Development in 2019/2020





4C STRATEGIES



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