#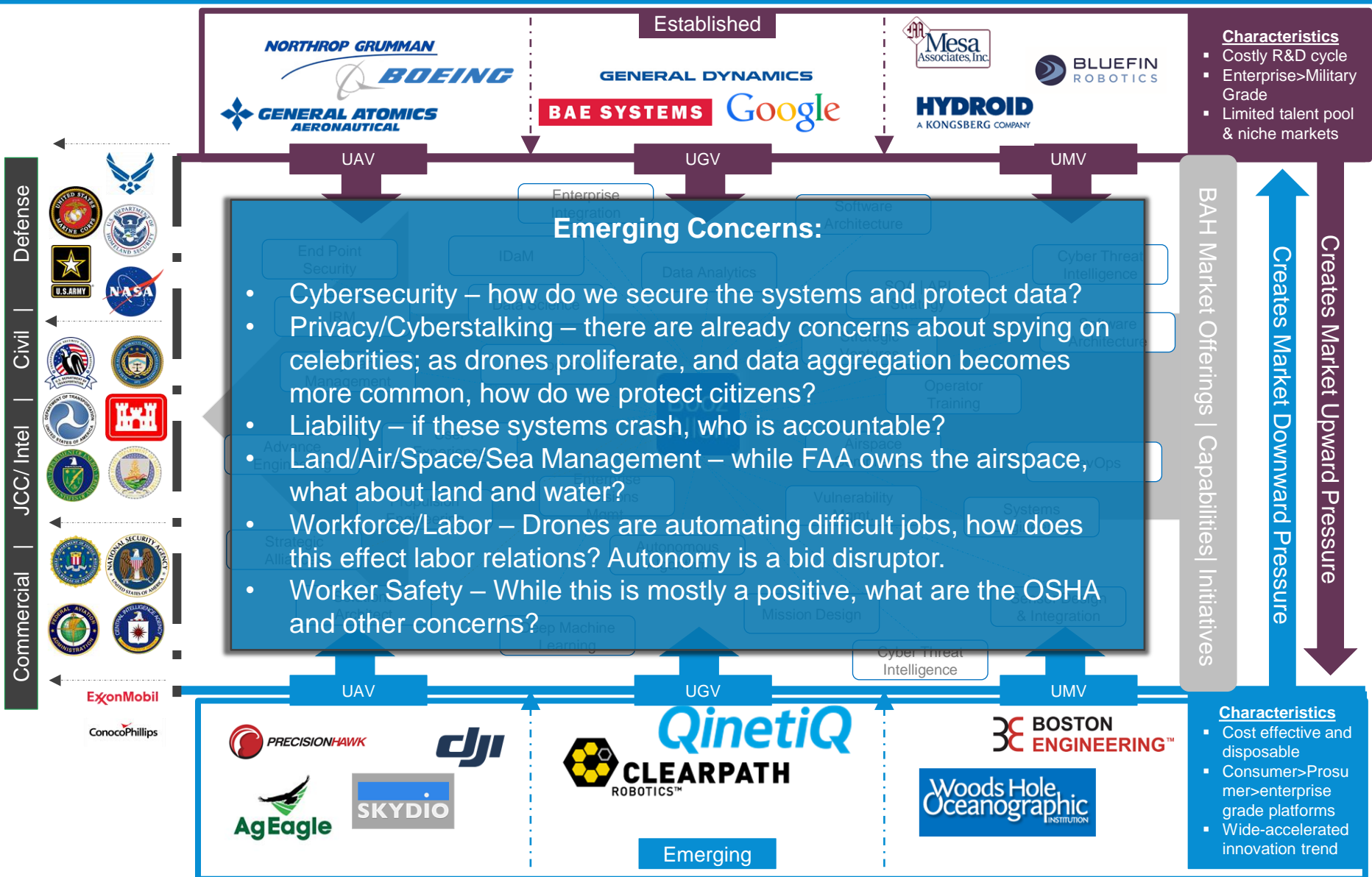 Unmanned systems will have a dramatic effect on the technology and regulatory landscape from security to labor and education.

Established

NORTHROP GRUMMAN
BOEING
GENERAL ATOMICS AERONAUTICAL

GENERAL DYNAMICS
BAE SYSTEMS
Google

Mesa Associates, Inc.
BLUEFIN ROBOTICS
HYDROID A KONGSBERG COMPANY

Characteristics
- Costly R&D cycle
- Enterprise>Military Grade
- Limited talent pool & niche markets

UAV | UGV | UMV

Defense | Civil | JCC/Intel | Commercial

BAH Market Offerings | Capabilities | Initiatives

Creates Market Downward Pressure
Creates Market Upward Pressure

Emerging Concerns:

- Cybersecurity – how do we secure the systems and protect data?
- Privacy/Cyberstalking – there are already concerns about spying on celebrities; as drones proliferate, and data aggregation becomes more common, how do we protect citizens?
- Liability – if these systems crash, who is accountable?
- Land/Air/Space/Sea Management – while FAA owns the airspace, what about land and water?
- Workforce/Labor – Drones are automating difficult jobs, how does this effect labor relations? Autonomy is a bid disruptor.
- Worker Safety – While this is mostly a positive, what are the OSHA and other concerns?

ExxonMobil
ConocoPhillips

UAV | UGV | UMV

PRECISIONHAWK
DJI
AgEagle
SKYDIO

QinetiQ
CLEARPATH ROBOTICS

BOSTON ENGINEERING
Woods Hole Oceanographic INSTITUTION

Characteristics
- Cost effective and disposable
- Consumer>Prosumer>enterprise grade platforms
- Wide-accelerated innovation trend

Emerging

Sources: Strategic Ventures Analysis

Experiential Technology is on the brink of commercialization – it will dramatically effect the way we work.

Virtual Reality

Oculus Rift

BREAKING NEWS
There are currently 685 virtual reality start-ups with an average valuation of $4.5 million
-- Motley Fool --

HTC Vive

Samsung Gear VR

Leap Motion
(Hand Tracking)

LEAP

Augmented Reality

MS Hololens

BREAKING NEWS
Augmented/Virtual Reality to hit $150 billion disrupting mobile by 2020
-- Digi-Capital --

Google Project Tango

Daqri Industrial Helmet

PTC Vuforia

Horizon Technologies

Lightfield Displays
(Zebra Imaging, NVIDIA)

Brain-Computer Interface
(Muse, Emotive)

Voice Recognition/Control
(Amazon Echo, Siri)

amazon

Sensory Extension
(VEST, SuperVentures)
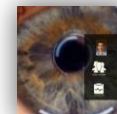
Eyefluence
(Eye Tracking)

Sand Display
(US Army)

Emerging Concerns:

- Privacy
- Cybersecurity
- Biometric Security
- Public Safety
- Data Ownership

Digi-Capital Platform Waves

VR/AR/MR

Mobile

Internet

PC