WORKGROUP 5: FUTURE-READY TECHNOLOGIES

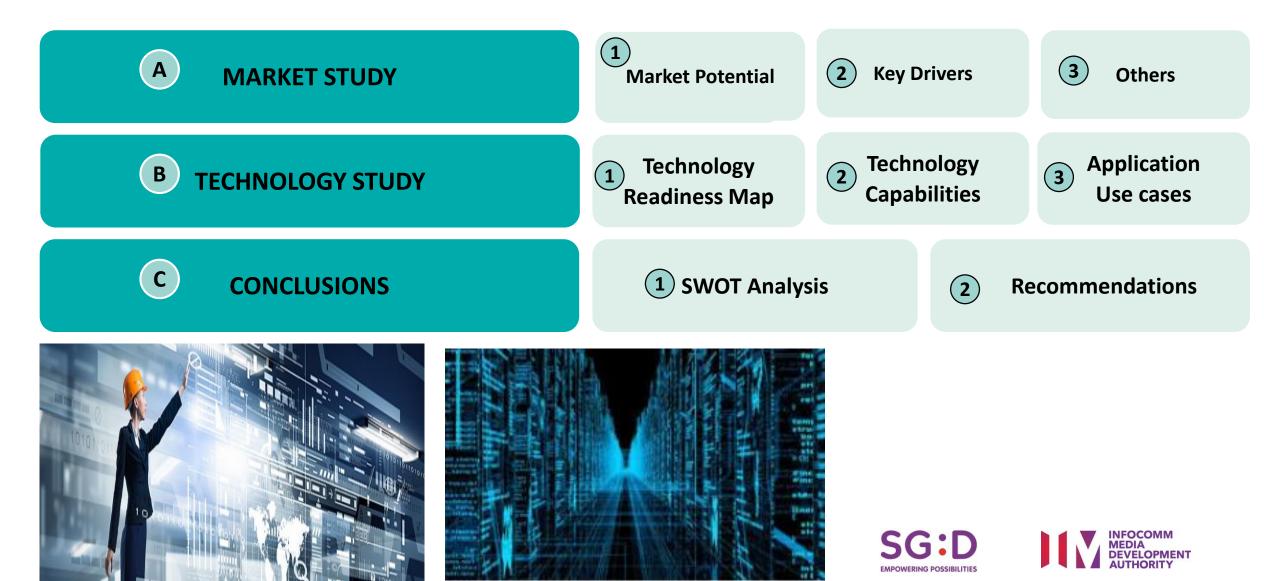
SERVICES AND DIGITAL ECONOMY TECHNOLOGY ROADMAP

22 NOVEMBER 2018





OUTLINE



OUTLINE

A MARKET STUDY	1 Market Potential	2 Key Dr	rivers	3 Others
B TECHNOLOGY STUDY	1 Technology Readiness Map	2 Technology Capabilities		(3) Application Use cases
C CONCLUSIONS	1 SWOT Analy	sis	2 R	Recommendations



New Era of Human and Machines: Embracing Future-ready Technologies



- Evolution of Human-Machine interaction: 3 main systems
 - Digital Autonomous Systems (Intelligent Machine)
 - Intelligent Connected Systems (Machine-Machine)
 - Psychological Collaborative Systems (Human-Machine)

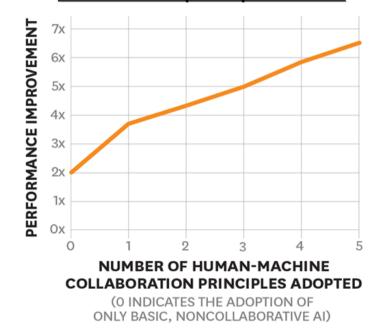
Market Study

The Trajectory of human-machines collaboration, powered by technology Stage 1 Stage 2 Stage 3 Stage 4 Stage 5 00. 1960s to 1980s to 1990s to Emerging within the Emerging within the 1980s 1990s present next 2-5 years next 5-10 years Minimal interactions Interactions between Humans interact with Humans and machines Interactions between machines between machines and machines and humans are machines through can be used and humans not possible due interchangeably as humans possible by facilitated by smart intuitive interactions as to limitations in hardware and means of intermediate both have been screens: screens machines are equipped interfaces hardware and manipulated based on with devices to respond equipped with interfaces e.g. keyboards direct physical contact or to ambient cues and capabilities to Multiple users interact spoken interaction intentional movements compensate with a single machine at A single user interacts e.g. gesture, mood, gaze shortcomings with a single machine at Machines can interact this stage A single user interacts this stage with multiple machines with each other as well

at this stage

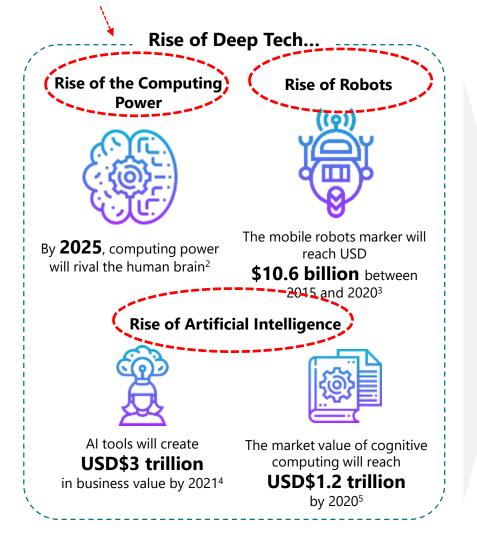
as humans at this stage

Increase in the number of human-machine collaboration improves performance.



Technology will transform this relationship and is poised to generate value that do not exist today

Technology Drivers...



... will transform human-machine collaboration...

Collaborative Human Machine Systems Perform Better than Humans or Machines in Isolation



Up to $\mathbf{7x}$ performance improvement with human-machine collaboration¹

... generating significant impacts.



Massive Productivity Improvement

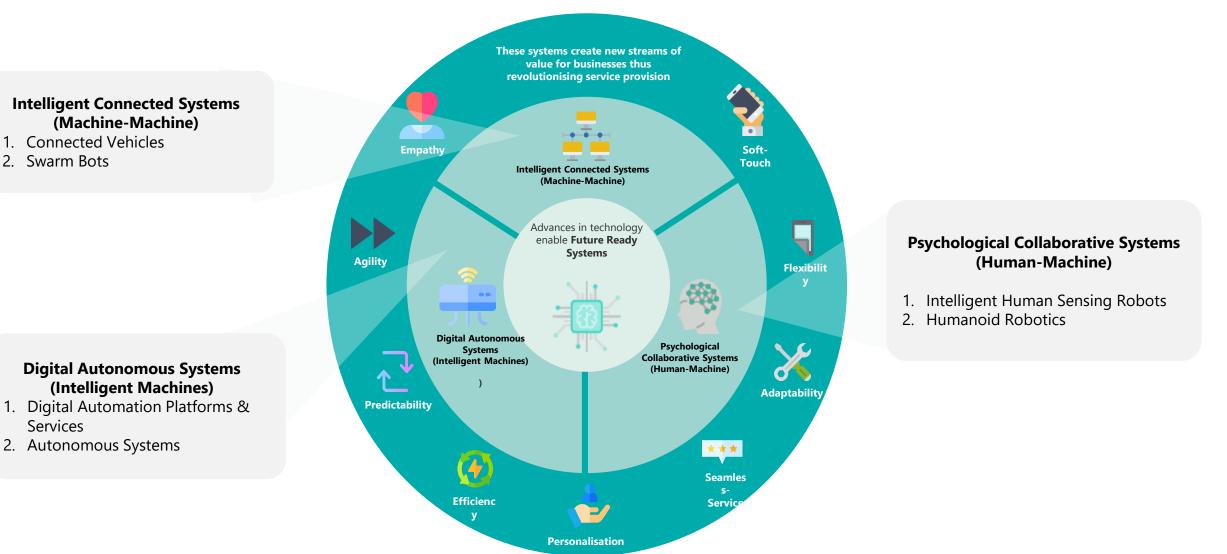


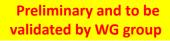
Completely New Way Of Delivering Services



New Services Offered That Does Not Exist Today

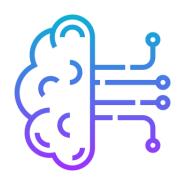
Human-machine systems can be categorized in three buckets to further Future Ready Systems



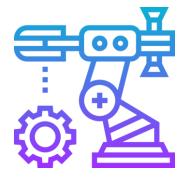


SINGAPORE SHOULD PLAY A KEY ROLE IN BUILDING HUMAN-MACHINE SYSTEMS BASED ON FUTURE TECH

"As-A-Service" Platforms



Exporter of A. Bots

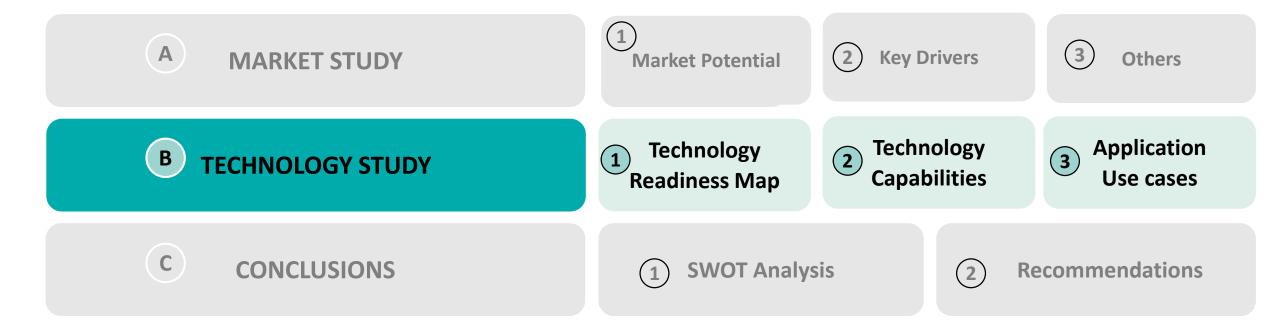


Providing "as-a-service" platforms for Future Ready tech applications which can be powered by HPC Become a key player in A.Bots that leverages psychological collaborative systems Test-Bed for Future Tech



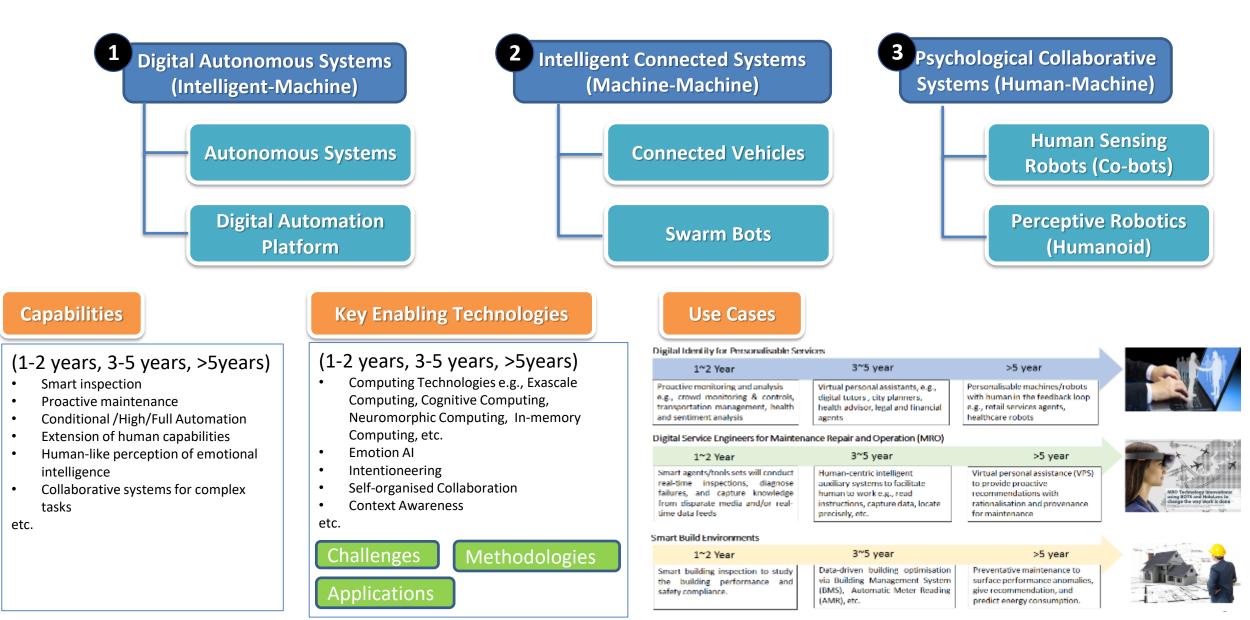
Allowing organizations to innovate and develop future tech solutions in Singapore







WG5 FUTURE READY TECHNOLOGIES: TECHNICAL WRITE-UP



WG 5

B TECHNOLOGY STUDY

2 Capabilities

Digital Autonomous Systems (Intelligent-Machine)

1

TECHNOLOGY READINESS MAP ON DIGITAL AUTONOMOUS SYSTEMS

	Categories	Now~2 Years	3~5 years	>5 years		
Digital Aut	Capabilities	Smart Inspection: - Observe, learn, and capture knowledge from disparate media and/or real-time data feeds; - High performance inspection for detection or quality control;	 Preventive maintenance: maintain self-sovereign identity; interpret human intention for engineering design and analysis; 	 Proactive enhancement: give recommendations with rationalisation and provenance for production improvement; transfer knowledge between systems e.g., virtual personal assistance (VPS) 		
	Technologies	 GPU-accelerated Computing Narrow AI/ML Nature Language Processing (NLP) IoT sensors and wearables Edge computing Chat bots Computer vision 	 Exascale Computing General AI for decision making, reasoning, and planning Cognitive computing Assistive Technology Augmented Reality Semantic technology 	 Neuromorphic Computing Commensense AI for proactive improvement Virtual Assistant Deep Neural Network ASICs High performance blockchain 		
	Application Scenarios/Use Cases	Smart Building Environment Automate analytics of building performance (e.g., to inspect building for safety and compliance), drive performance and cost optimization of their real estate portfolio by surfacing performance anomalies, recommend preventative maintenance, predict energy consumption, and etc.				
Automatous systems/	Capabilities	Conditional Automation - auto steering and monitoring - semi-auto for dynamic tasks - human take over when needed	High Automation - auto steering and monitoring - fully auto for dynamic tasks - more auto driving modes/conditions;	Full Automation - auto steering and monitoring - all driving modes/conditions that can be managed by a human driver		
	Technologies	 Perception-detection Route planning and learning for simple uncrowded environments Augmented reality Deep learning 	 Perception-tracking Route planning and learning for unstructured and Semi-crowded environments 	 Perception-prediction Route planning and learning for complex, unstructured and human environments 		
	Application Scenarios /Use Cases	Autonomous Bots/Vehicles – Land Autonomous systems including autonomous vehicle with less human invention	s, mobile bots, machines or devices which can navigate, plan routes,	and complete tasks indoor and/or outdoor autonomously		

USE CASES ON INTELLIGENT-MACHINE

Construction Building inspection, maintenance
Financial Service virtual assistant as financial advisor
Professional Service virtual assistant
ICT and media videos or contents recommendation
Food manufacturing smart inspections
Retail Personalisable robots for recommendation
Manufacturing digital twins for MRO
Education virtual tutors

B TECHNOLOGY STUDY

WG 5



Digital Automation Platforms and Services

Now~2 Years

Proactive health monitoring, Identification of manpower shortage, mass sentiment analysis, and crowd monitoring and controls

3~5 years

Virtual personal assistants such as digital tutors, health/legal/ financial advisors to help rapid digital workforce reconstruction

>5 years

Personalisable machines/robots to help on personalized customizable retail services and have a feedback loop with human









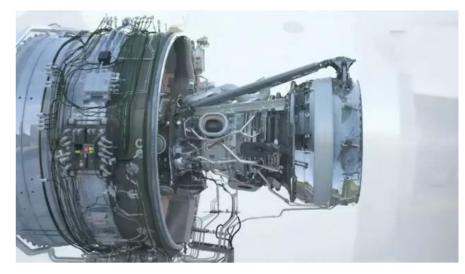
TECHNOLOGY READINESS MAP ON INTELLIGENT CONNECTED SYSTEMS

	Categories	Now~2 Years	3~5 years	>5 years		
Conn	Capabilities	Be capable of vehicles to vehicles communications, and	Be capable of communication between vehicles and a broad range of infrastructures, and advanced traffic management			
Connected vehicles	Technologies	 In-memory Computing V2X communication Narrow AI / Data analytics Vehicles platooning Intelligent traffic advisor Driver assistance system 	 Strong AI / Big data analytics 5G Context-aware system Intelligent traffic management Remote vehicles platooning 	 Advanced context-aware system Security Advanced traffic management system 		
es	Sconarios / Iso	Connected vehicles for safety: Vehicles can sense the movement of vehicles and pedestrians in its neighbourhood, and can predict their movement to avoid possible collisions.				
Swarm bots	Capabilities	Be capable of collaborative tasks with central control or human intervention. Robots are able to communicate with neighbouring ones, collect data, and execute the activities assigned by the central controller.	Collaborative systems with little human intervention: Be capable of collaborative tasks with little human intervention, self-organised, and making decisions by individual bots. Robots are able to negotiate with neighbouring ones, generate and execute the activities towards a set of tasks.	bots under complex environments, and adapting organisation structures to tasks.		
	Technologies	 Machine to Machine communication Planning and scheduling Localization Narrow Al Cloud intelligence Petascale computing 	 Multimodal context awareness Self-organized systems Context-aware system Strong AI Edge computing Exascale Computing 	 Context-aware system for complex tasks Self-organized cooperation Low cost bots Collaboration of robotics with different operating systems 		
	Application Scenarios /Use Casees	Micro swarm bots for maintenance and healthcare: Micro swarm robotics can be used to inspect the engine without removing it from the aircraft. On the other hand, tiny swarm robotics for healthcare can carry medicals to accurately travel to targeted tissues and destroy them.				

USE CASES ON MACHINE-MACHINE

Professional/Manufacturing service maintenance			
Logistic container ship terminal			
Sea transport search for missing marine			
Security security monitoring system			
Retail service robotics			
Healthcare - Medicine			

B TECHNOLOGY STUDY



Swarm Bots for Engine Maintenance

Now~2 Years

WG 5

Micro robots are able to bring cameras to the inside of the engine so that human can do defects detection. They collaborate to cover the whole engine to save time.

3~5 years

Micro robots are able to communicate with neighboring ones, perform defects detection by themselves, and even collaborate to do repairs.

>5 years

Miro robots can collaborate to complete the defects detection and repair task in an efficient and intelligent way.







TECHNOLOGY READINESS MAP ON PSYCHOLOGICAL COLLABORATIVE SYSTEMS

	Categories	Now~2 Years	3~5 years	>5 years	
Human Sei	Capabilities	 Advanced Sensing for Automated Planning Capabilities: Robust detection of humans for safety purposes. Advanced force control of end-effectors. Automated route planning and navigation. 	 Advanced Sensing for Shared Human-Robot Workspaces: Increased implementation of shared workspaces. Enhanced safety in terms of human-robot interaction. Improved productivity. 	Advanced Sensing for Joint Workflow: Optimum productivity. 	
Human Sensing Robots (Co-bots)	Technologies	 3D Sensing Cameras Cognitive computing Automated planning Affective Computing 	 Human behaviour prediction Advanced Emotion Analytics Physical Human Robot Interaction 	 Neuromorphic Computing Intention Influence Robot knowledge sharing 	
-bots)	Application Scenarios/Use Cases	Future robotic systems shall be equipped with a variety of sensors and advanced algorithms that permit robust detection of human presence along with their behaviour. The development of these technologies progressively improves the collaboration quality between man and machine over the next 5 years.			
	Capabilities	Extension of Human Capabilities	Advanced Perception of Emotional Intelligence	Human-like Perception of Emotional Intelligence	
Perceptive Robots (Humanoid)	Technologies	 3D Sensing Cameras Advances in SLAM Personal recommendation systems (based on human preference) Wearable sensors 	Emotion sensingSoft robots	Neuromorphic ComputingDeep learning accelerator)	
	Application Scenarios /Use Casees		basic constructions of human law and norms of society. This	Robotic Authority type of systems with their improved emotional, legal, and moral understanding, can act as a part of the social hierarchy. In several instances, they can act as an authority.	

USE CASES ON HUMAN-MACHINE

Retailcustomer service robots
Retailentertainment robots
Hotelservice robots
Food service customer service robots
Securitysurveillance robots
Financial servicepayment services (e.g. Credit card)
Healthcare/Eldercare – personal robots

B TECHNOLOGY STUDY

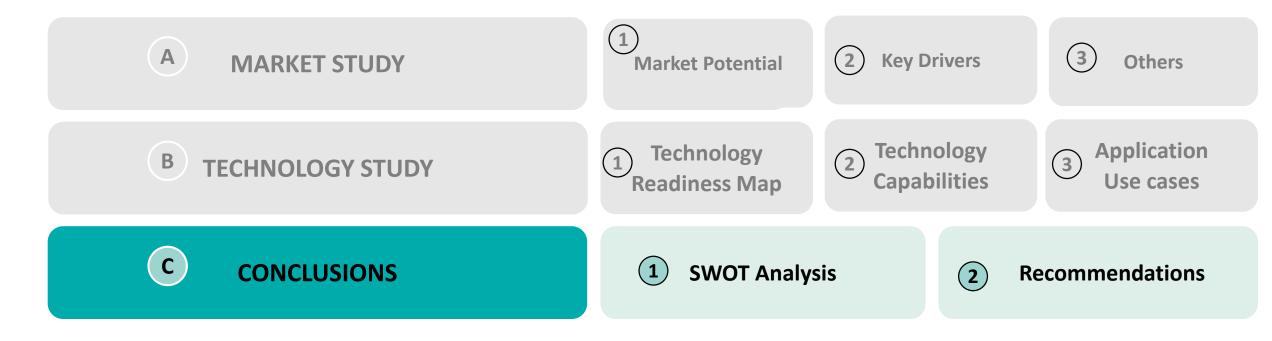
Perceptive Robots (Humanoid)

WG 5

Now~2 Years	3~5 years	>5 years	ATTR
Recommender algorithms utilized in services and retail to customers, companion bots, in restaurants for F&B industry, provide entertainment in malls, home security, home monitoring.	In hotels and travel agencies for tourism, connected home and housing, mobility assistance in eldercare, in hospitals as robotic caregiver systems to post-surgery patients, to provide assistance to customers in banks.	To assist in providing paediatric care and telemedicine, medical diagnosis, medical therapy, robotic authority (e.g., traffic enforcement, etc)	



OUTLINE





SWOT Analysis - System Specific Analysis

Our analysis of Singapore and the global landscape reveals that there are <u>both system specific as well as system aqnostic</u> <u>elements</u> to the SWOT analysis.

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System		Indicators	Singapore's Standing	Rationale
		Self Driving Vehicles	2 nd Globally ¹	Singapore has supportive policy and legislation, robust infrastructure and high customer acceptance ²
Digital Autonomous System (Intelligent Machine)		High Performance Computing	19 th Globally ⁷	Singapore has 2 of the high performance computers listed in the Top500 list ⁷
(intelligent machine)				
		Advanced Cloud Technology	1 st in APAC ⁶	High ranking as a result of high-quality broadband, governmental support, emphasis on cybersecurity and strong IP protection laws ⁶
Intelligent Connected system	N°°	Advanced Communication Technology	10 th Globally ⁹	Singapore is still at a trial phase for advanced communications behind the front runners China, South Korea, Japan and the US ³
(Machine-Machine)				
-99	ı∰،	Advanced Robotics	2 nd / 3 rd Globally ^{4 5}	National Robotics Programme received SGD\$450 million over the last 3 years has greatly supported robotics development ⁴
Psychological collaborative system (Human-Machine		Advanced Al	Not listed in top 10 list for #Al professionals working in the country	Proactive government initiatives an funding; however, lack of talent will be a constraint to develop the technology ⁸

Source: (1) eGov Innovation, https://www.enterpriseinnovation.net/article/us-singapore-lead-country-readiness-index-self-driving-vehicles-716424406, (2) KPMG https://www.enterpriseinnovation.net/article/us-singapore-lead-country-readiness-index-self-driving-vehicles-716424406, (2) KPMG https://www.singtel.com/about-Us/news-releases/journey-to-5g-singtel-and-ericson-to-launch-singapores-first-5g-pilot-network (4) The Robo Report https://www.thropsourney-to-5g-singtel-and-ericson-to-launch-singapores-first-5g-pilot-network (4) The Robo Report https://www.thropsourney-thtps://www.thropsourney-to-5g-singtel-and-ericson-to-launch-singapores-first-5g-pilot-network (4) The Robo Report https://www.thropsourney-to-sg-singtel-and-ericson-to-launch-singapores-first-5g-pilot-network (4) The Robo Report https://www.thropsourney-thropsourney-thropsourney-thropsourney-thropsourney-thropsourney-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-singtel-and-ericson-to-sg-sg-singtel-and-ericson-to-sg-sg-sg-sg-sg-sg-sg-sg-s

SWOT Analysis - System Agnostic Analysis

What is Working Well

What is Not Working Well

Strong Presence of Technology Companies: Singapore ranks second in top Asian locations for tech companies

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Strong support by the government on Technology in R&D: Smart Nation initiatives focussed on assistive technologies, analytics and robots for healthcare

High Quality Talent Pool: Singapore ranks first in Asia Pacific in the Global Talent Competitiveness Index (GTCI) 2017

Investment in R&D: The Government has committed SG\$19 billion to R&D over the for the Research Innovation Enterprise 2020 Plan; a component of this is the development of the ASPIRE1 the first peta-scale supercomputer in Southeast Asia

Investment in Technology by Multiple Sectors: The financial and technology industries are is investing heavily in new and emerging technologies in order to improve its service offerings

World Class Innovation: The 2017 Global Innovation Index ranked Singapore as the most innovative country in Asia, while the 2017 Bloomberg Innovation Index ranked Singapore sixth globally

Geographic Location: Singapore's unique geographic location within the ASEAN region and in the broader Asian continent, lends itself to become a hub to service intelligence driven technology. Singapore's size allows such technologies to be tested in this area



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Lack of Local Market: Lack of successful start-ups in deep-tech areas, compared to dynamic innovation hubs like the Silicon Valley and Israel

Aggressive Overseas Markets: China and the US alone account for 46% of global R&D spending, severely outpacing any other country in this area, competing with them on the same level is challenging due to the sheer size of both countries

Lack of Talent: Demand far exceeds supply of local technology talent; the government estimates that there are 400 graduates a year with the right gualifications for the tech jobs; the shortage of tech talent forces Singapore firms to outsource abroad

Overdependence on Government Grants: Many tech start-ups here are of "lower risk, lower growth" calibre leading to fewer deep-tech start-ups that, despite being riskier ventures, could reap greater rewards

Lack of Commercialisation of Future Tech: It is challenging to bridge the value of death for Future Tech due to inability to commercialize, the market stagnating or betting on the wrong technology

Lack of Scale in Data: Many emerging systems require data to train them, Singapore lacks the size compared to, for example, China and India, who have much larger populations and consequently larger data pools



Three guiding principles to leverage Singapore's unique strengths and overcome its weaknesses to build its Future Ready Technology capabilities

Singapore should <u>aim to become a hub</u> where Future Ready Technologies is developed, piloted and scale up by <u>concerted effort of local and global stakeholders</u>

Leverage Singapore's unique geographic location and highly innovative and 'trusted' environment to attract global investments and talent

Singapore develops a <u>technology infrastructure</u> that provides <u>enabling ingredients</u> to develop Future Ready Tech as well as <u>access to the Future Ready tech</u> to maximize adoption – ISaaS Adopt As-a-Service philosophy in developing and disseminating technology into the ecosystem

Singapore should <u>continue building</u> its capabilities for the Future Ready Tech – National Competency Program*

Singapore boasts a strong talent pool but is constrained in scale; focussing on Future Ready Tech early on will ensure long term sustainability and competitive advantage

* Junior STEM (Science, Technology, Engineering and Mathematics) is required to build a funnel of talent for national competency programme

Recommendations

- Firstly, Singapore should aim to develop research and development (R&D) programme for Future-Ready Systems -Intelligent-Systems-as-a-Service (ISaaS) platforms for R&D of Future-Ready Systems such as Intelligent-Machine, Machine-Machine and Human-Machine systems and its innovative services. These platforms should comprise of advanced computing architectures and provide democratised access to newly created APIs including "warm" and "perceptive" human-centric API system technologies. This includes the seeding of a next generation computing platform on a Public-Private-Partnership (PPP) basis. Furthermore, to support ISaaS and to accelerate R&D for emerging technologies and adoption, a roadmap for an advanced computational infrastructure and exascale performance capability (e.g., at least 1 exaFLOPS) should be put in place in Singapore by 2025.
 - Secondly, Singapore should set up the SDE Future-Ready Living Lab Framework addressing the value chain of technology readiness levels and together with GLCs, MNCs, SMEs, IHLs, R&D organisations and start-ups to build a scalable and sustainable SDE in Singapore. Singapore's unique geographic location and highly innovative and 'trusted' environment will help attract global investments and talent. This framework should include series of tech innovative challenges focusing on building and incorporating the future-ready systems such as Intelligent-Machine, Machine-Machine, Human-Machine, etc.
 - To set up National Competency Programme to focus on Intelligent Systems capability building incorporating multidisciplinary of intelligence of Things (IoT – not "Internet"), Autonomy and Social-Psychology combined. Singapore currently boasts a strong talent pool but is constrained in scale; focussing on training programmes and fostering growth of talent, will enable long-term sustainability and competitive advantage.

3

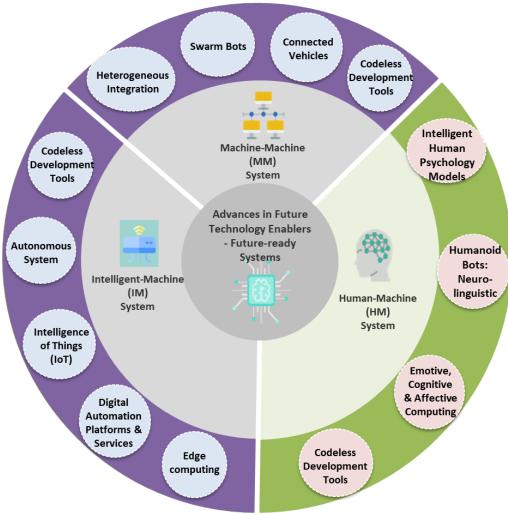
Example Outcome: Singapore to become a hub for A-bots

Singapore has a competitive advantage in the development of HM systems and could aim to become a hub where **Augmented Bots – 'A Bots'** R&D

- Multiple countries around the world have invested in developing IM and MM Systems
- Singapore should continue to conduct R&D in this area but not prioritise its resources in this area due to the stiff competitive landscape

Future-ready System Technology

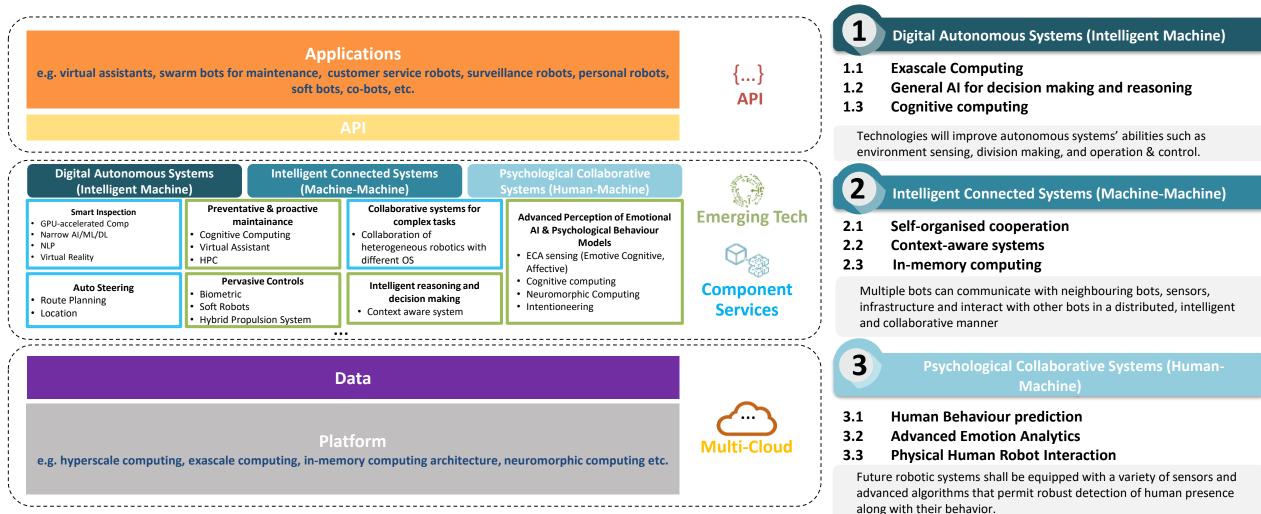
Legend



- HM Systems are endowed with capabilities to recognise, interpret and express emotions in human psychological models
- Singapore has a significant competitive advantage in these systems as not many countries have invested in developing these solutions.
- By focussing R&D resources on developing HM systems, Singapore can build a strong foundation to anchor this R&D in this futureready system technology and adoption in Singapore early.
- Key differentiating factors of Singapore:
 - pervasive high-bandwidth digital infrastructure,
 - multi-racial cultural behavioural understanding,
 - psychological personalization sensitivity,
 - high productivity/efficiency,
 - trusted entities, etc.



Alignment of Future Ready Technologies in Cloud Native Architecture





WG5

Future-Ready

Technologies

Alignment of Future Ready systems to the DE Framework

INTEGRATING ECOSYSTEMS

SDE Future Ready Living Lab Framework

Addresses the value chain of technology readiness levels and together with GLCs, MNCs, SMEs, IHLs, R&D organisations and start-ups to build a scalable and sustainable SDE in Singapore

DIGITALISING INDUSTRIES

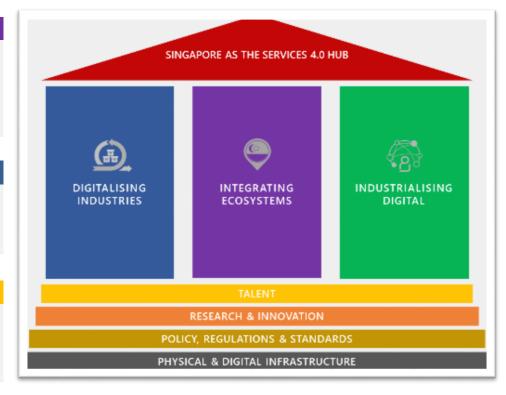
SDE Future Ready Living Lab Framework

To support technology innovation challenges focusing on building and incorporating the future ready technologies.

TALENT

National Competency Programme

Capability building incorporating multi-disciplinary of intelligence of Things (IoT – not "Internet"), Autonomy and Social-Psychology combined



INDUSTRIALISING DIGITAL

SDE Future Ready Living Lab Framework

This includes the seeding of a next generation computing platform on a Public-Private-Partnership (PPP) basis. To support ISaaS and for accelerating emerging technologies R&D and adoption,

RESEARCH & INNOVATION

R&D Programme for Future-Ready Systems

Develop research and development (R&D) programme for Future-Ready Systems - Intelligent-Systems-as-a-Service (ISaaS) platforms for R&D of Future-Ready Systems such as Intelligent-Machine, Machine-Machine and Human-Machine systems and its innovative services

PHYSICAL & DIGITAL INFRA

Intelligent Systems as A Service (ISaaS)

Uses advanced computing architectures e.g. exascale performance capability by 2025

THANK YOU



