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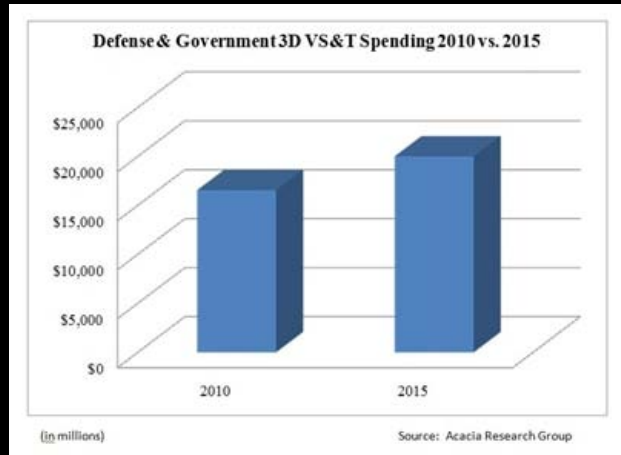
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Defense and Government 3D Visualization, Simulation, and Training Market to Grow Quickly

Category: News
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Vancouver, Wa. - Worldwide spending on hardware, software, and services for 3D visualization, simulation, and training in the defense and government segment will reach \$16.5 billion in 2010 and grow to \$20 billion by 2015, according to Acacia Research Group's latest market study, "Opportunities in 3D Visualization, Simulation, & Training 2010-2015: Defense & Government."

"The 3D visualization, simulation, and training defense and government market is on the cusp of another disruption. 3D capable browsers, ubiquitous 3D on the desktop, in notebooks, and in handheld devices will make 3D accessible to a large portion of the defense and government workforce," says Christine Arrington, senior analyst, Acacia Research Group. "Hardware makers, application developers, and service providers will have to evaluate their business models and their development strategies to take advantage of the new opportunities that will appear worldwide over the next five years. Those who adapt will benefit those who do not will suffer."



A perfect storm is brewing that will bring 3D content creation technology from the entertainment industry to the defense and government segment on a much larger scale than previously seen. The entertainment market has pulled back on spending, leaving many tool and middleware makers wondering how they are going to survive until consumer spending on games and films returns to high levels. At the same time, government agencies around the world are realizing the value of 3D applications for training and visualization. 3D capabilities are becoming ubiquitous across agencies as computers with basic graphics hardware that can run 3D applications penetrate most agencies. 3D capable browsers will be the next phase in 3D everywhere.

Many tool and middleware companies have worked with government agencies, particularly military agencies for many years. However, 3D was a luxury that was usually reserved for the high-end mission-critical jobs. Visualization, simulation, and training systems typically cost agencies millions of dollars. Entertainment technology is set to change that business model on a huge scale. Off-the-shelf middleware products such as game engines, physics, and artificial intelligence will allow agencies to commission applications at much lower prices. Content creation companies have spent many years developing packages that focus on making applications easier to use for non-programmers, and creating subscription business models that fit more appropriately in the per-seat purchase model of many government agencies.

Entertainment industry content creation technology will allow 3D applications to spread throughout the thousands of job titles in the many different government agencies around the world, helping push strong growth in the segment. The biggest challenge will be adjusting revenue models, customer support systems, and integrating "real-world" content into the development. Companies that can successfully navigate these challenges will see the defense and government visualization, simulation, and training market become an important new revenue stream.

The military sub-segment will continue to be the biggest spender on 3D technology. The biggest change will be that growth in spending on 3D technology will no longer be concentrated in Western markets. Militaries in Asian and Middle Eastern markets will adopt 3D visualization, simulation, and training technology very quickly.

Research and administrative spending will provide 3D technology companies with a

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diverse set of opportunities. Access to 3D capable computing on the desktop will allow agencies ranging in responsibility from agriculture to health services to adopt desktop simulation and training in many job categories.



Civil aviation spending sponsored by governments will be a smaller market, but security, construction, and air traffic management upgrades will keep 3D technology in high demand. The civil service segment will be one of the toughest with law enforcement and emergency response agencies focused on other technology priorities over the next five years.

"The defense and government segment will offer 3D technology makers huge opportunities over the next five years," says Arrington, "Many government agencies and government funded projects will turn to 3D technology for advanced training and analysis. No agency is looking to waste money right now so any technology that can prove it saves a government money will have an advantage. "

"Opportunities in 3D Visualization, Simulation, & Training 2010-2015: Defense & Government" is Acacia Research Group's comprehensive study on the market for technologies that enable military, emergency response, planning, and other government agencies to conduct training and education, data analysis, system simulation, and similar virtual tasks through the use of 3D computer graphics systems.

This report covers the hardware, software, and services that make these systems possible and focuses on the market and technology trends that will help shape these markets over the next several years. Included are five-year forecasts for spending in the 3D VizSim market within the defense & government segment and its sub-segments of civil aviation agencies, civil services, military, and research and administration and within the hardware and software product categories, and by major geographical region.

This market study (75 pages, with 14 charts and figures, and 46 tables) is priced at \$2,995 for electronic (PDF) and print (single copy). Site licenses are available for \$4,492.50 and include three printed copies, intranet posting privileges, and unlimited internal distribution. The study is available for purchase via the Acacia web site.

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