

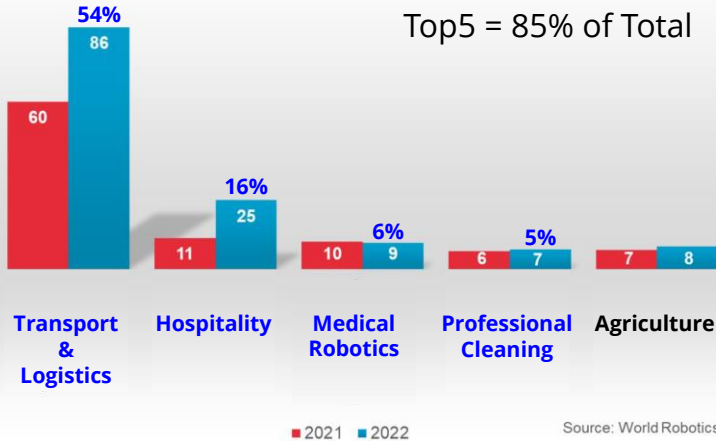


# Booming Market for Professional Service Robots



Service robots for professional use. Top 5 applications  
Unit sales 2021 and 2022  
'000 of units

Top5 = 85% of Total



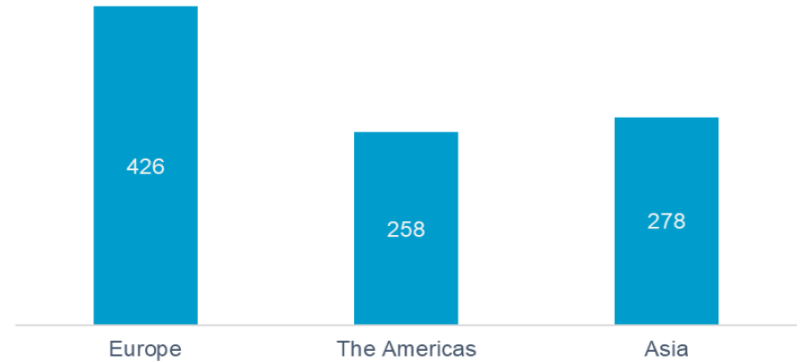
Source: World Robotics 2023

## Worldwide Market for Professional Service Robots

- **158,000** new robots installed in 2022
- **48% YoY growth** over 2021
- **Transport & Logistics** account for 54.4% of the new installation

## Five times more SR than IR suppliers

Number of service robot suppliers by region  
as of August 2023, main regions only



## More Vendors/Robots Entering the Market

- 1000 suppliers (80% SMEs; 10% new startups)
- **Opportunities** to benefit from new innovations
- **Challenges** to manage different brands/models
- High demand for interoperability solutions



# The Challenges

**Vendor lock-in**



**IT/OT Integration**



**Total cost of Deployment**



**Safety and Collaboration**



**Scalability**

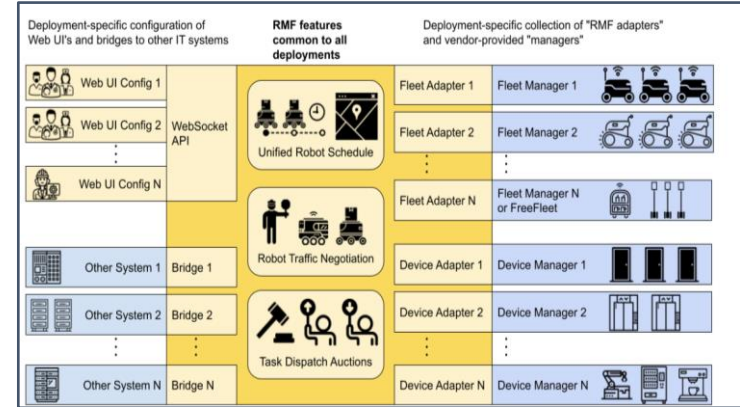


**Talent Crunch**



# Robotics Middleware Framework (RMF)

- Initiated in 2018, with funding from Singapore's National Robotic Program (NRP) office
- Collection of software modules and tools that enable interoperability among:
  - Fleets of heterogeneous mobile robots (different vendors, models, specs)
  - Building infrastructure (door, elevators, etc.)
- Primary focus on healthcare and hospital applications



<https://www.open-rmf.org/>



# RMF2.0: Next-generation Interoperation Platform and Technologies



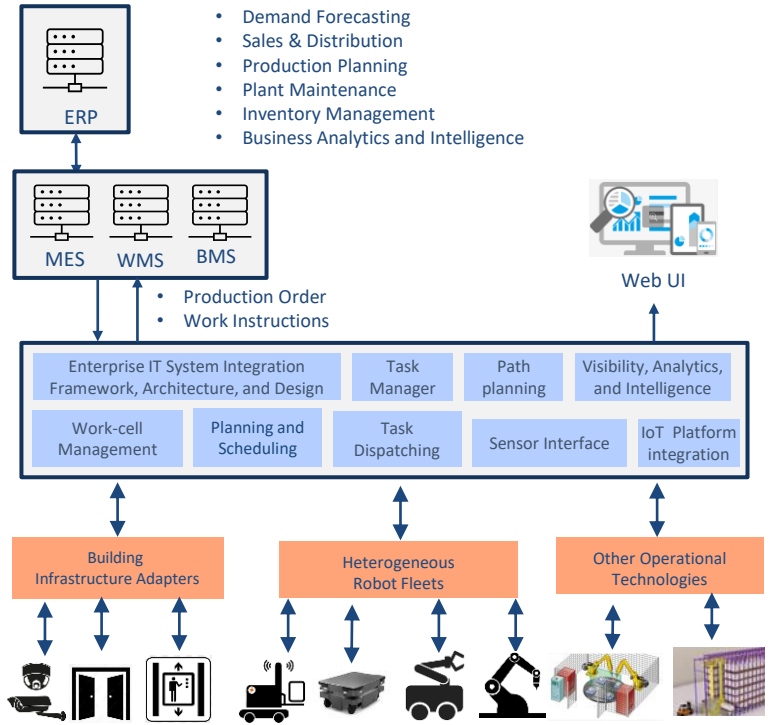
- **The RMF2.0 Program** (Jul 2023- Jun 2025) led by ARTC will be focused on use cases in manufacturing & logistics (M&L), and facility management (FM).
  - Programme is funded by NRP and supported with additional internal fund from ARTC
  - New features to support IT/OT integration, co-simulation, and robot execution
  - Interoperability among mobile robot fleets with automated M&L systems, such as ERP, MES, WMS, SCADA, ASRS, workcells, etc.
  - New web UI based control tower and configuration support



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# Interoperable Robotics for Multiple Industries

— *To better enable the integration, inter-operation, and orchestration of heterogeneous mobile robot fleets and related enterprise IT & OT systems*



**1 Integrative Dynamic Co-Simulation for Digital Twin-based Scenario Planning & Performance Optimization**

- Certainty in production schedule execution
- Early detection and elimination of bottle-necks
- Optimal utilization of AMR resources
- Digital twin-based scenario planning and optimization.

**2 Hyper Connectivity for Enterprise IT/OT Integration in Manufacturing and Logistics**

- Seamless integration of IT/OT systems
- Unified data structure and unambiguous semantics across systems and applications
- Elimination of islands of automation/data/analytics

**3 Robot Execution System for Autonomous Manufacturing Value Chain**

- Optimal execution of schedules by AMRs
- Agility in accommodating operation dynamics
- Learning-based continuous optimization
- Control tower of AMRs and related operations



# Ecosystem Approach to Capability Development



## RMF2.0 Program Team

- **Collaborate** with ecosystems players: end-users, product owners, systems integrators
- **Define** and **Prioritize** technologies, features and functions based on industries' inputs
- **Develop** technologies that best reflect the needs of participating companies
- **Demonstrate** and **Prove** the values at select partners' factory, warehouse, or facility



## Industrial Partners

- **Voice** your company's specific needs, requirements, and priorities
- **Co-steer** the direction of RMF2.0 technologies development
- **Prove** the values ahead of competition
- **Maximize** your return on investment



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**End-users** • **Systems Integrators** • **Product/Technology Suppliers**  
**Manufacturing**                      **Logistics**                      **Facility Management**



CREATING GROWTH, ENHANCING LIVES



# THANK YOU

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