

GEOSPATIAL INDUSTRY: MOVING UP THE VALUE CHAIN

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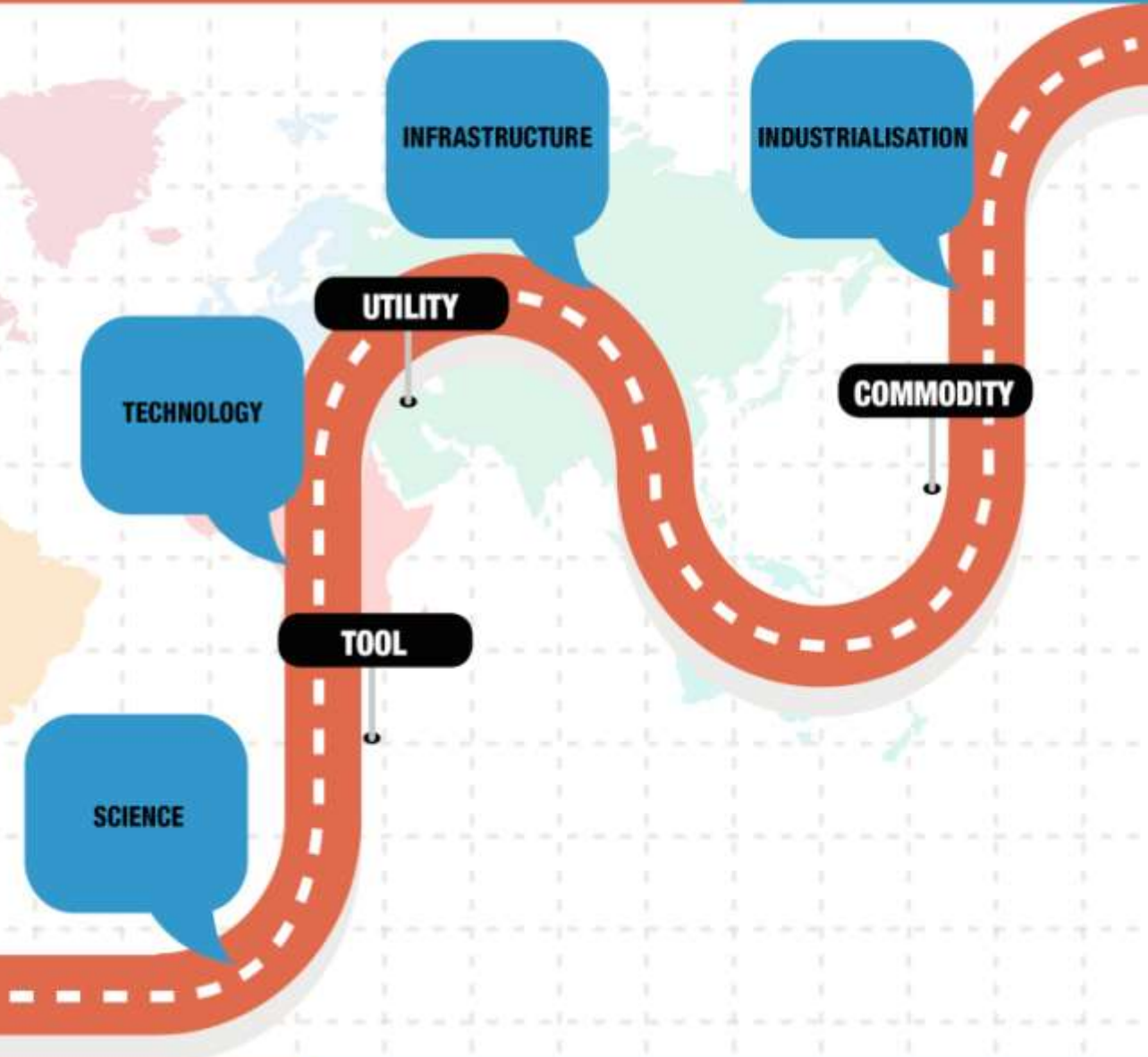
 **GEO**SPATIAL
media + communications

EVOLUTION

VISUALISATION TO INDUSTRIALISATION

GEO SPATIAL
media + communications

MONETISATION PROCESS



UP TO 10M



- **Navigation**
- **Land Use**
- **Telematics**
- **Forestry**
- **Environment**
- **Business Analytics**

UP TO 1M



- **Mapping**
- **Utilities**
- **Transportation**
- **Marine**
- **Oil & Gas**

CENTIMETER LEVEL

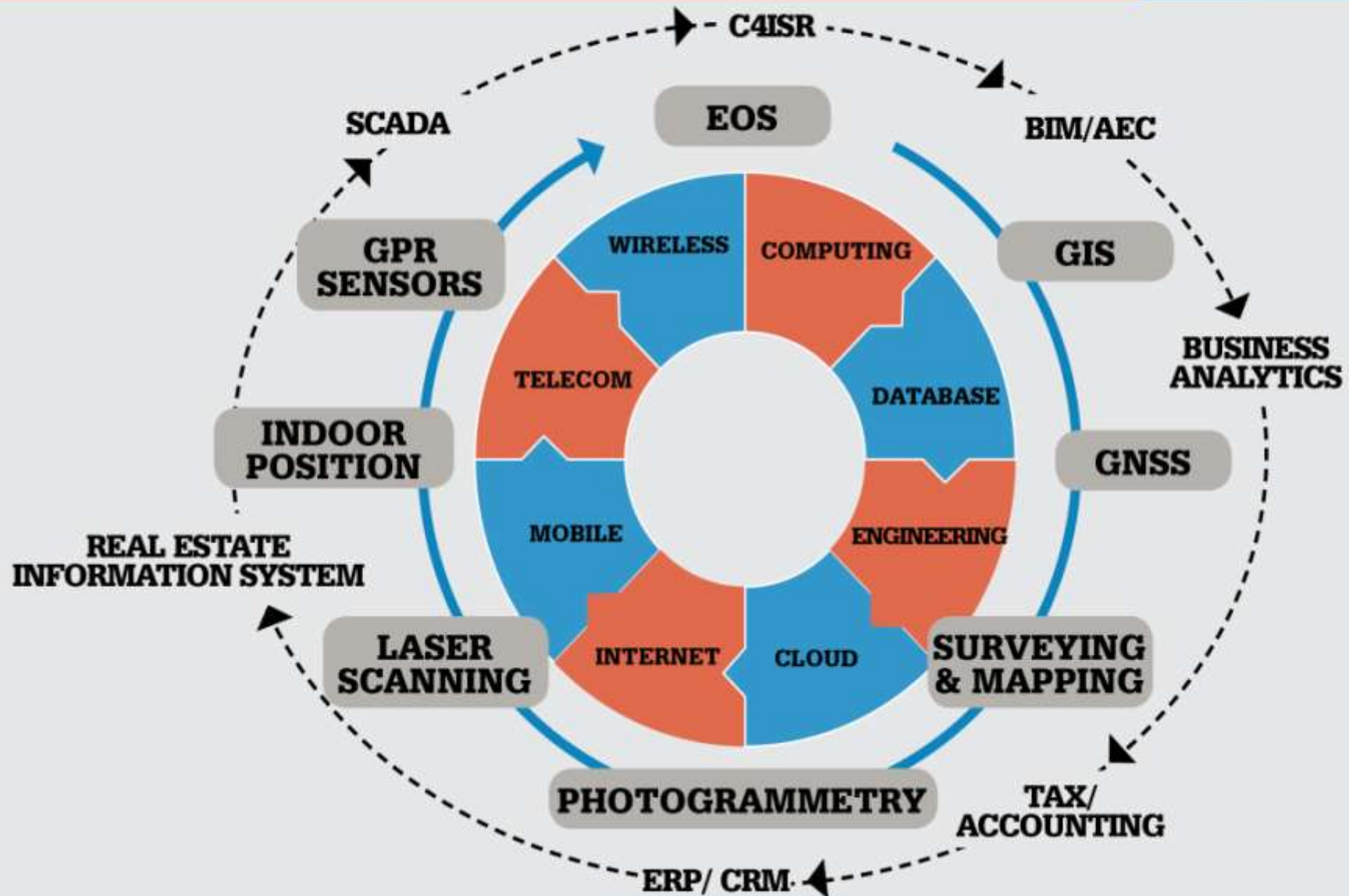


- **Mining**
- **Archeology**
- **Architecture**
- **Construction**
- **Land Admin**
- **Indoor Positioning**
- **Machine Control**

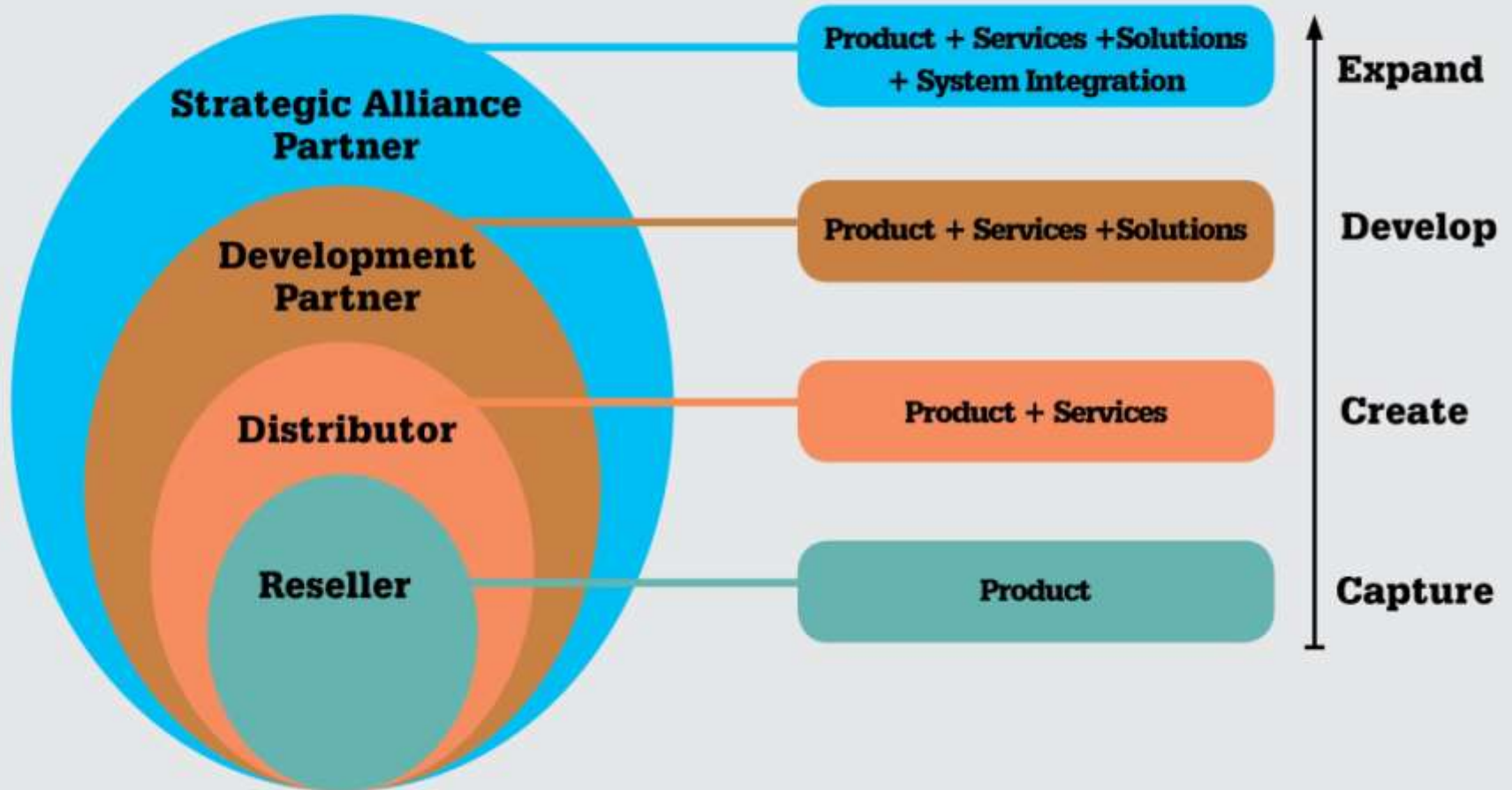
MILLIMETER LEVEL



- **Engineering**
- **Manufacturing**
- **Industrial Workflow**
- **Metrology**
- **Seismology**

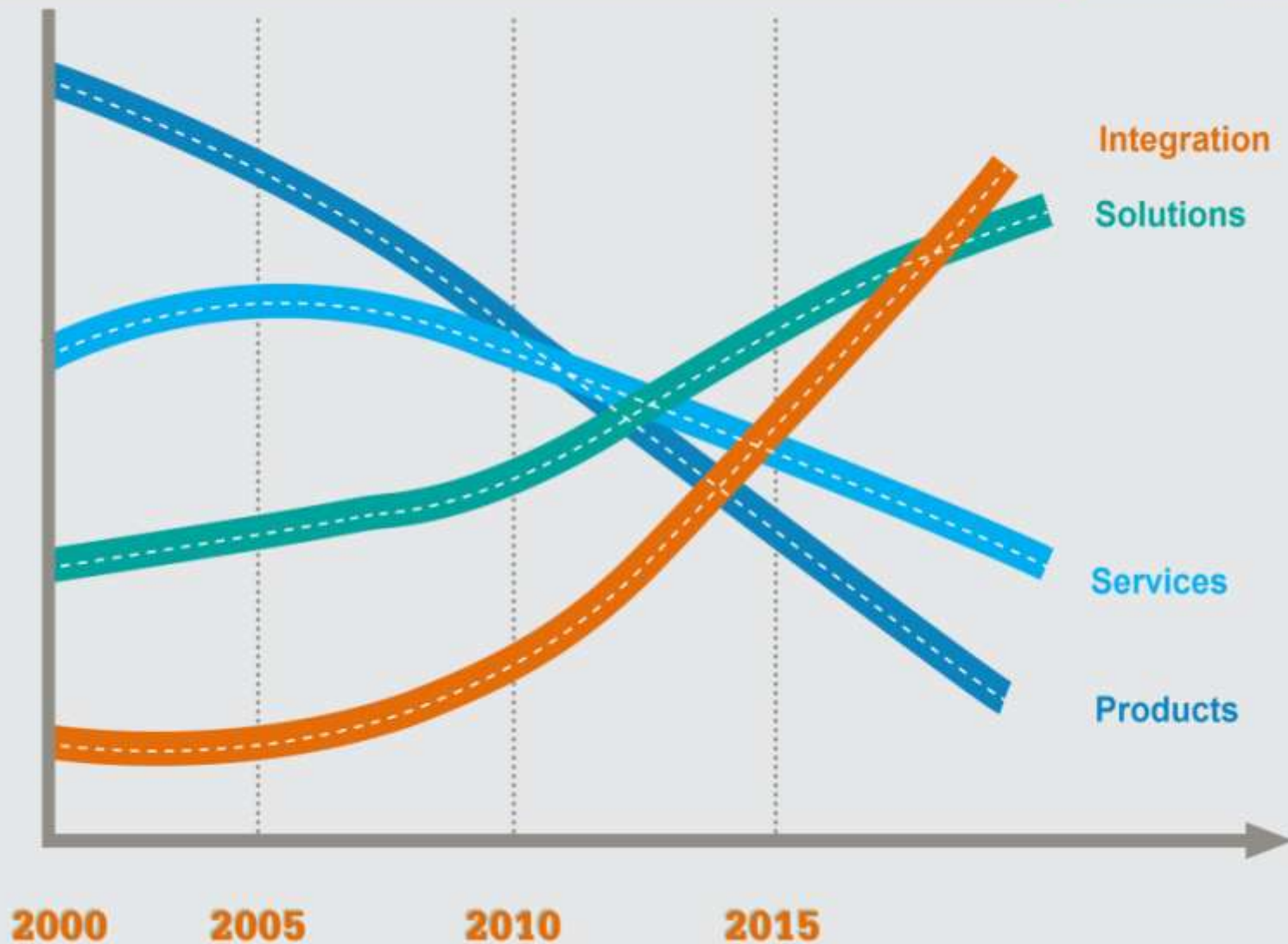


CHANGING MATRIX OF BUSINESS MODEL



Moving up the value chain

EVOLVING SALES MODEL



PARTNERSHIP MODEL

TOPCON: Sokkia

BENTLEY: elcoSystem + Ivara + InspecTech

TRIMBLE: Info + Ashtech + Spectra + Applanix
+ Gatewing + Tekla

HEXAGON: Erdas + Leica + Novatel Geomax +
Aibotics Intergraph + Distributors in Emerging Markets

TECHNOLOGY ORIENTED/MARKET CONSOLIDATION ACQUISITIONS

HEXAGON: Safe Mine, ILab; Arvus

TOPCON: Wachendorff Electronics; DynaRoad

BENTLEY: Acute3D; C3GLocal

TRIMBLE: Fifth Element; Linear Project;
IRON Solutions; Mining Information Systems

SOLUTION ORIENTED ACQUISITIONS BY GEOSPATIAL COMPANIES

AMAZON + UPNEXT = 3D Cloud

PITNEY BOWES + MAPINFO = Mailing Business

FACEBOOK + GOWALLA = Social Media

MICROSOFT + VEXCEL = Spatial Dimension

COMPETITIVE ADVANTAGE ACQUISITIONS BY MAINSTREAM COMPANIES

HEXAGON: Esri + Accenture

TOPCON: Autodesk + TORO + Komatsu

BENTLEY: Trimble +

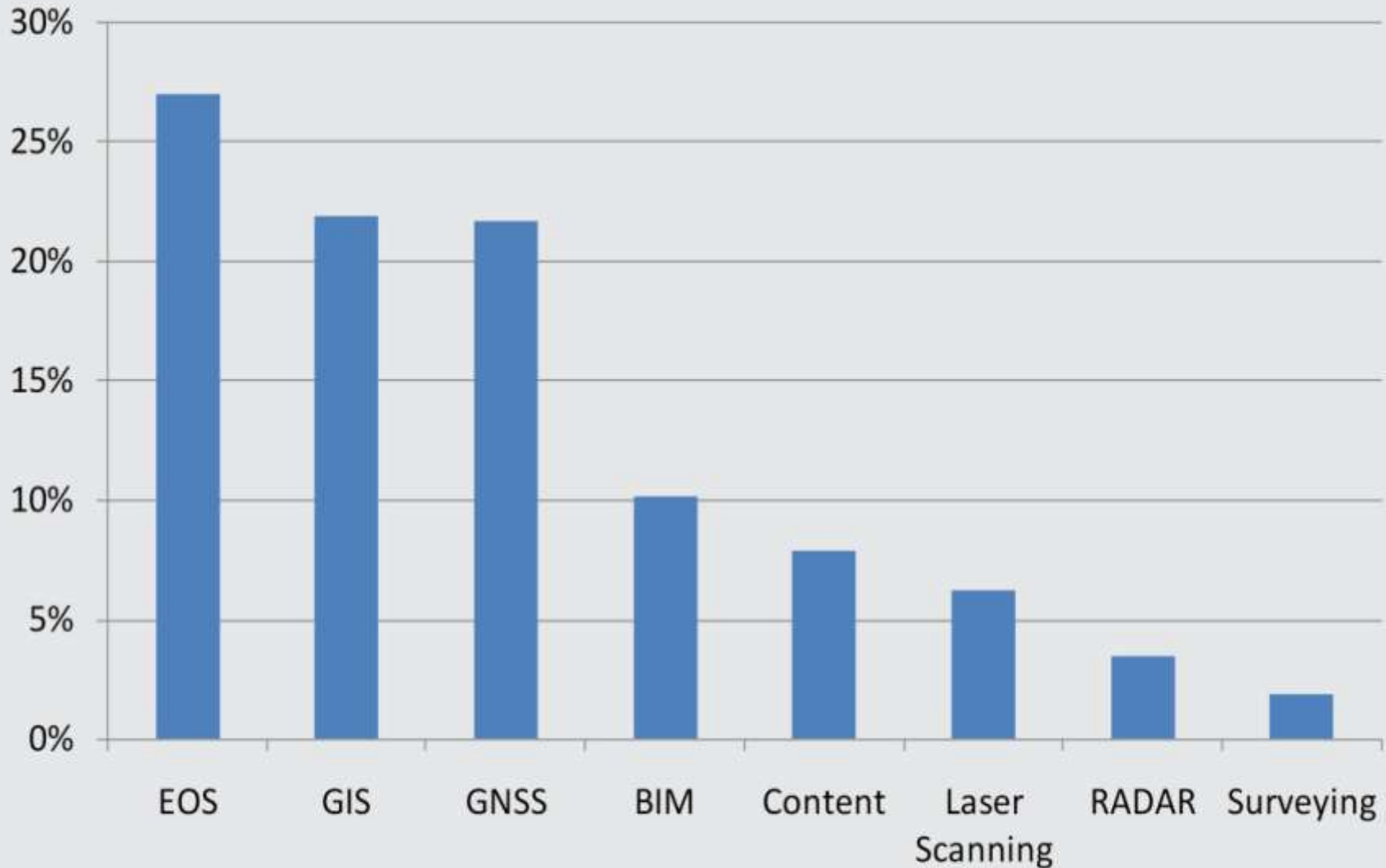
TRIMBLE: Bentley + Caterpillar + John Deere + Vico + IFICON

SOLUTIONS CENTRIC PARTNERSHIPS

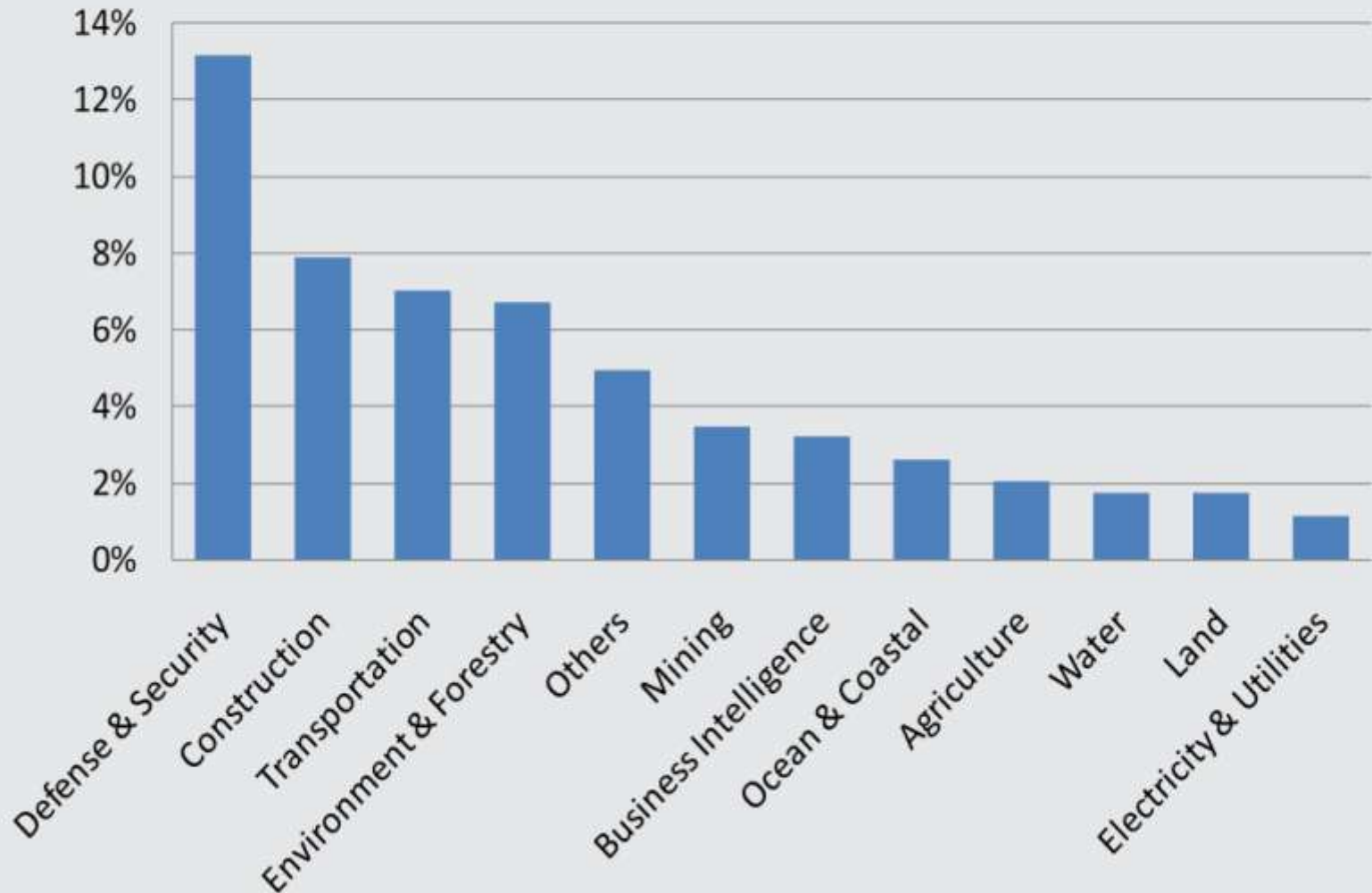
INDUSTRY DIRECTION

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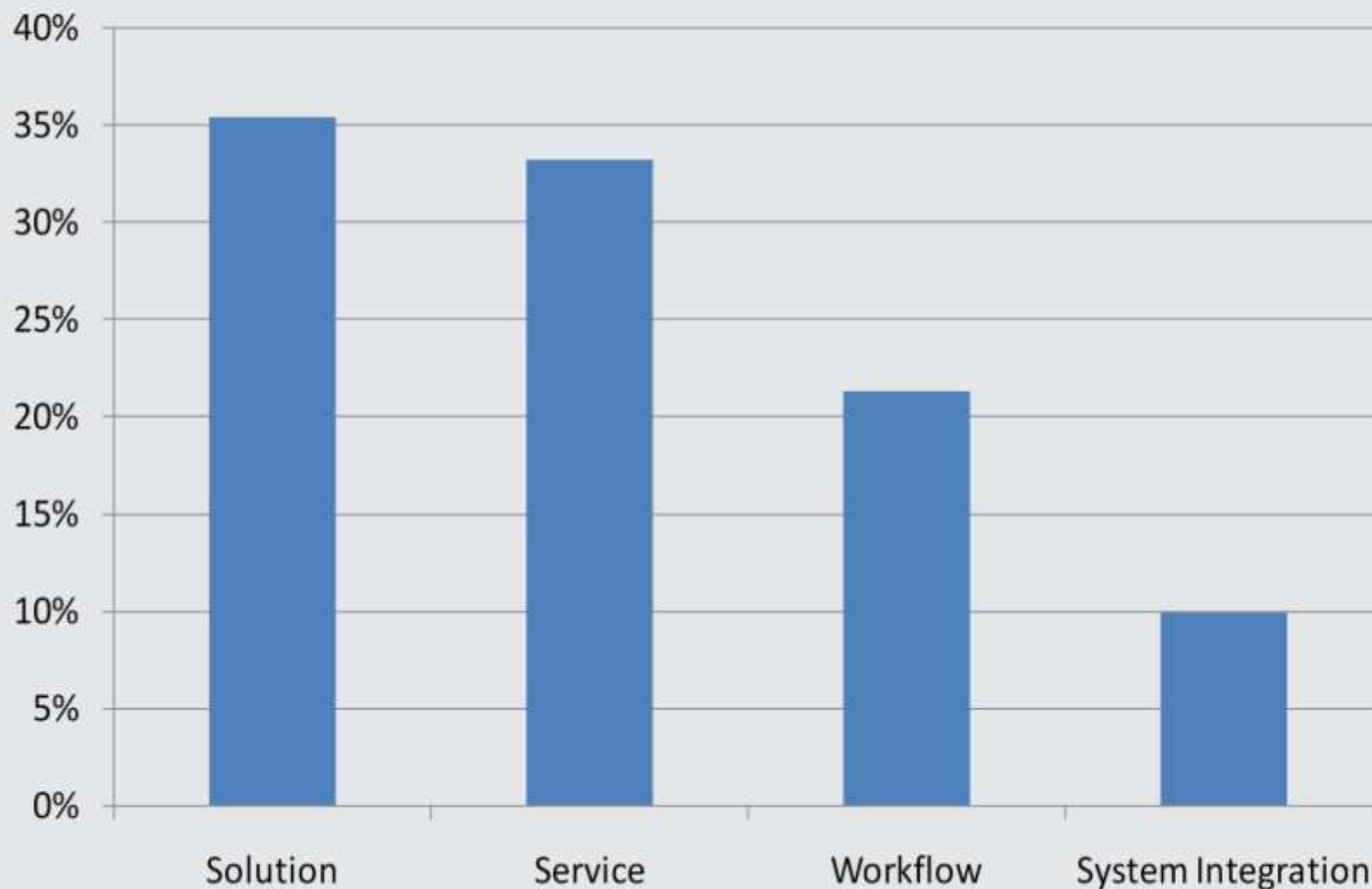
TECHNOLOGY FOOTPRINT OF GEOSPATIAL INDUSTRY



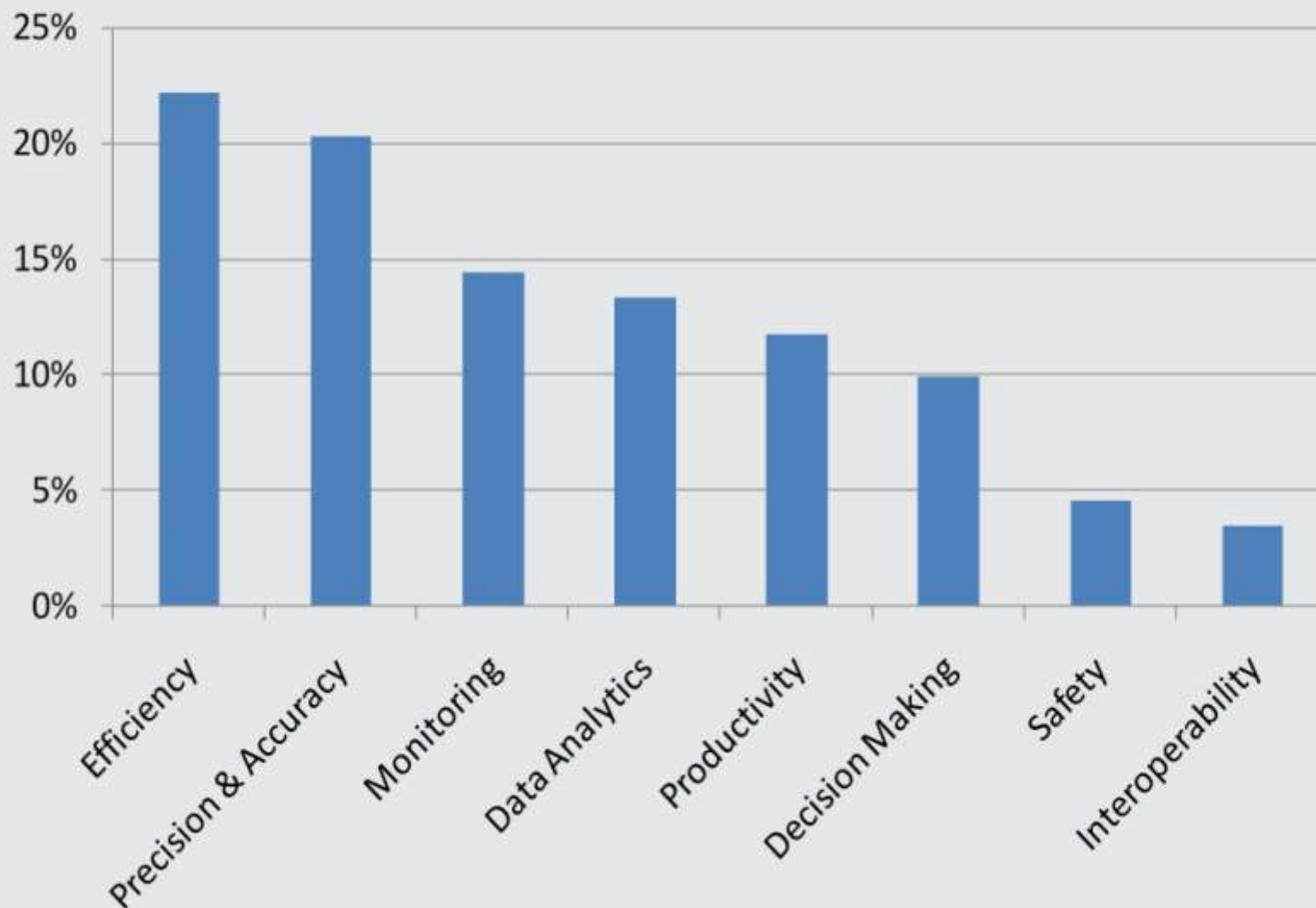
INDUSTRY WISE ADOPTION OF GEOSPATIAL TECHNOLOGY

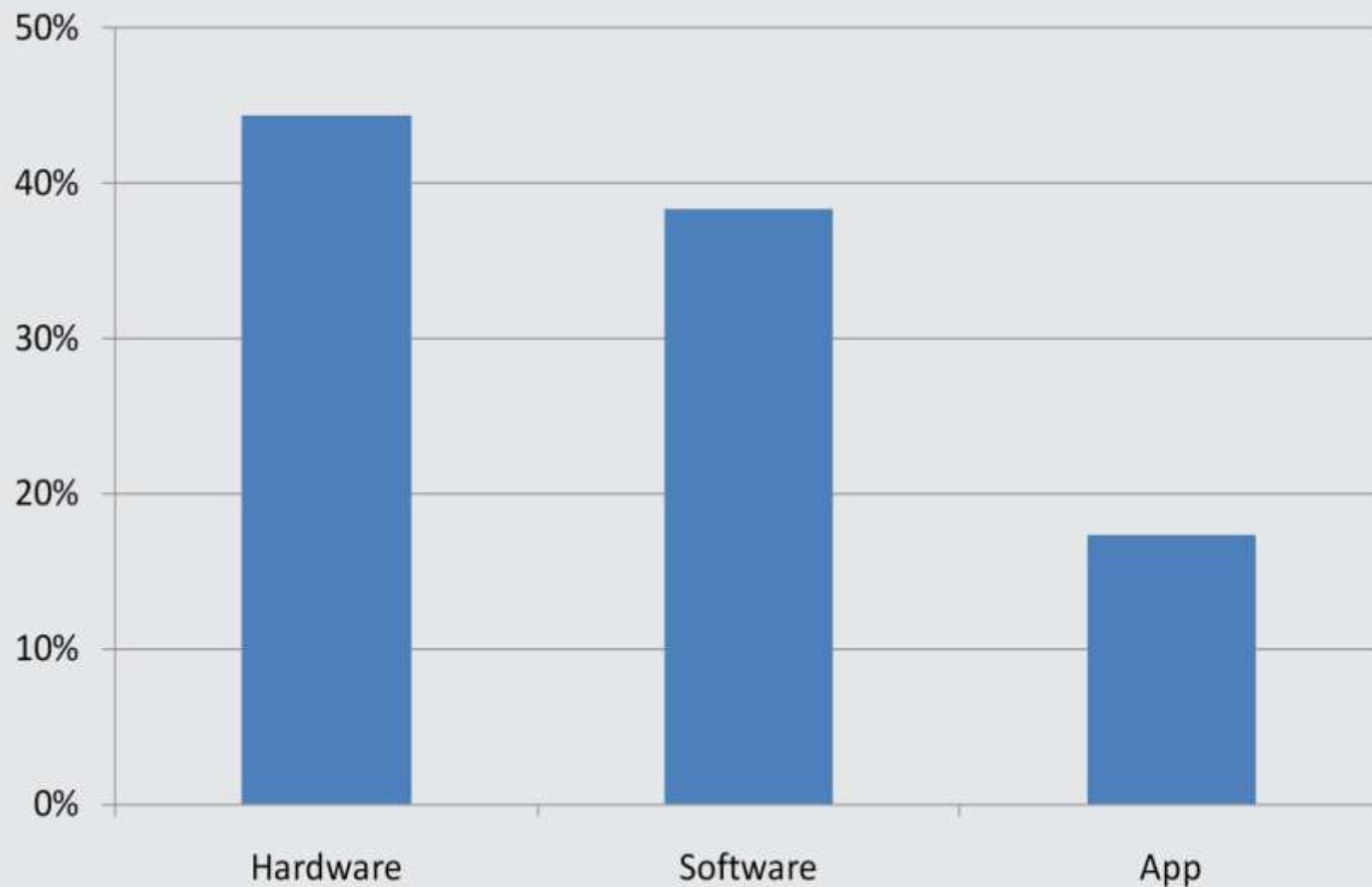


GEOSPATIAL TECHNOLOGY INTEGRATION AND CONVERGENCE

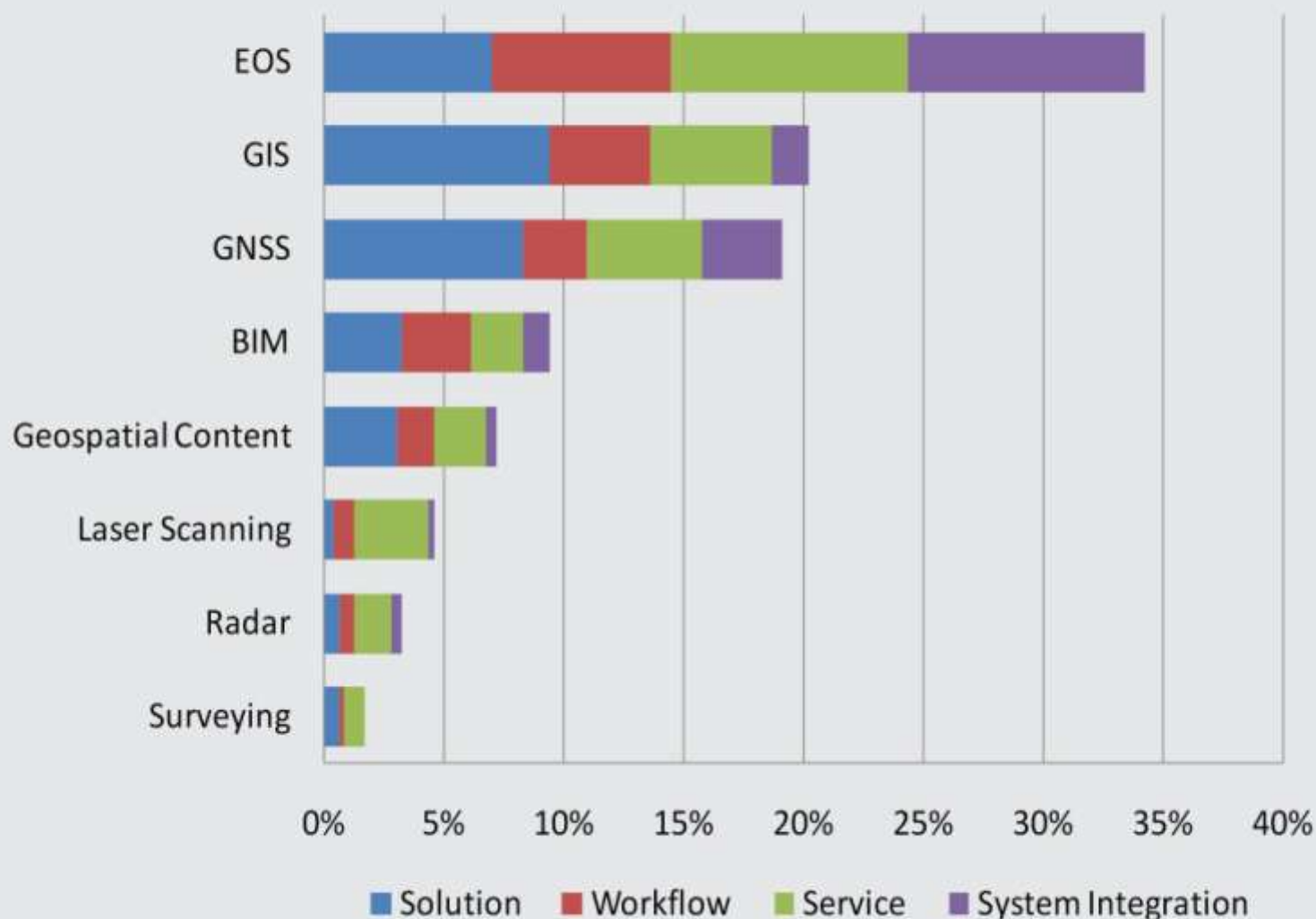


VALUE AND BENEFITS OF GEOSPATIAL TECHNOLOGIES

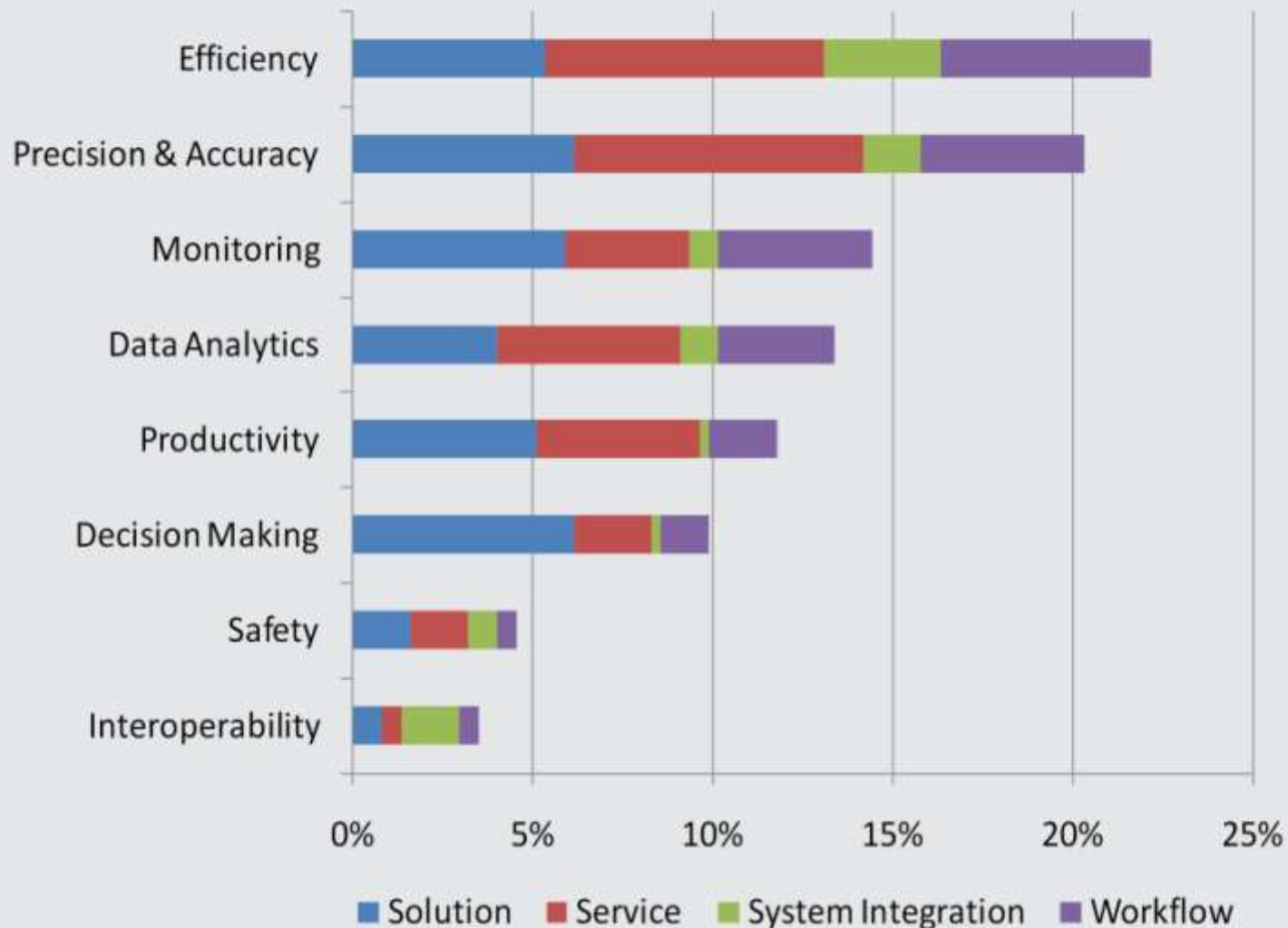




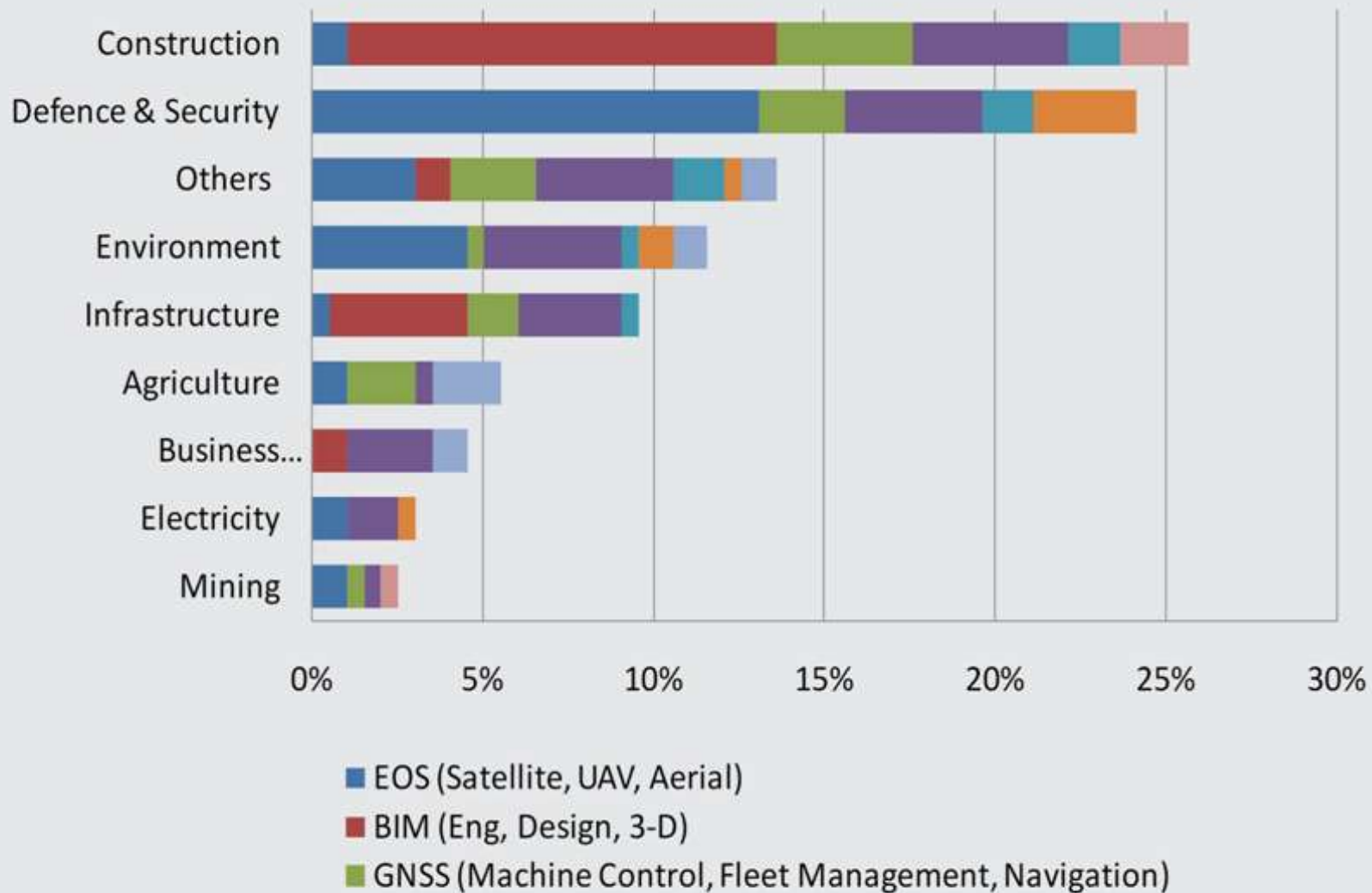
TECHNOLOGY WISE INTEGRATION AND CONVERGENCE



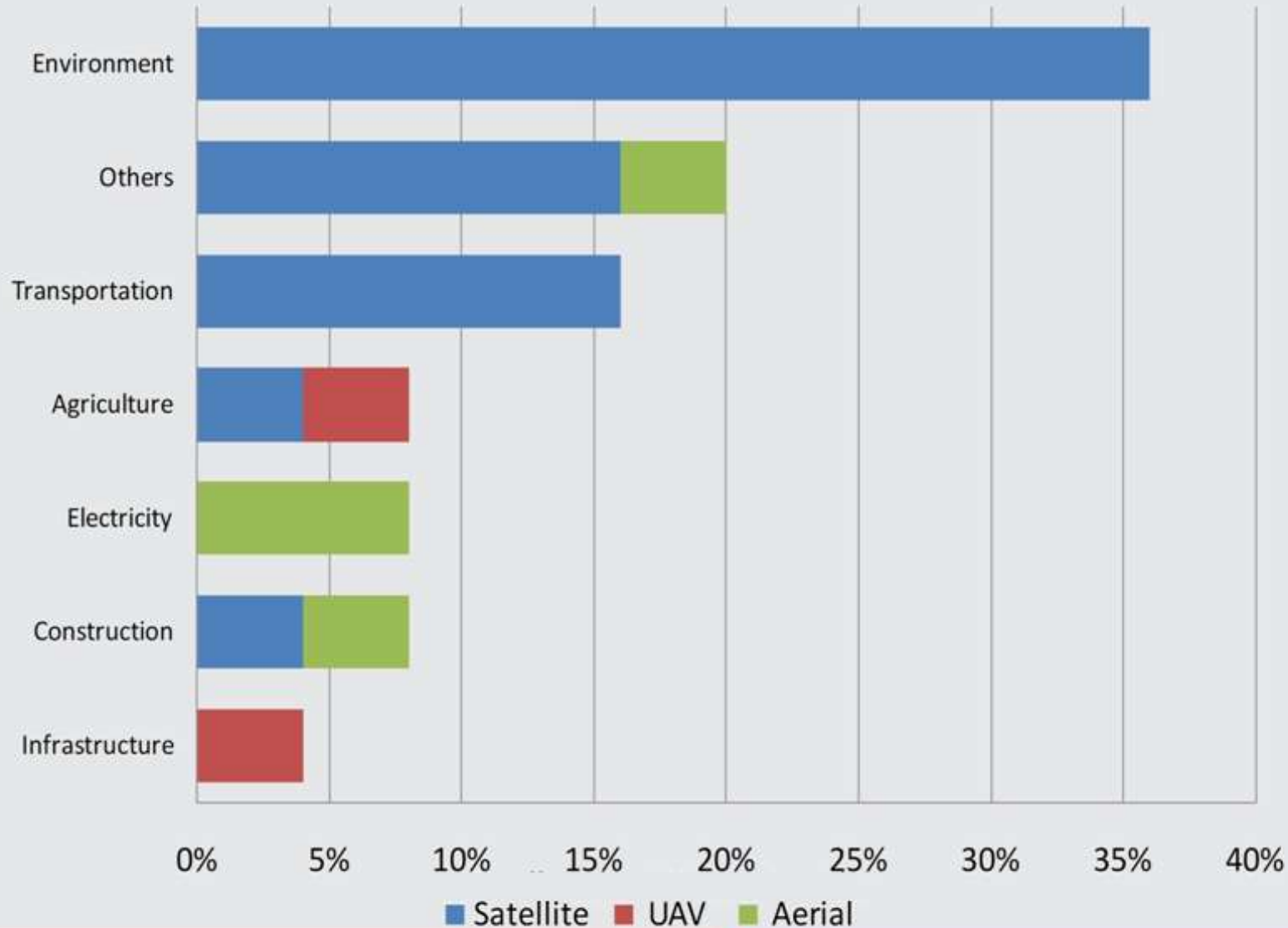
CONVERGENCE LEADING TO BENEFITS



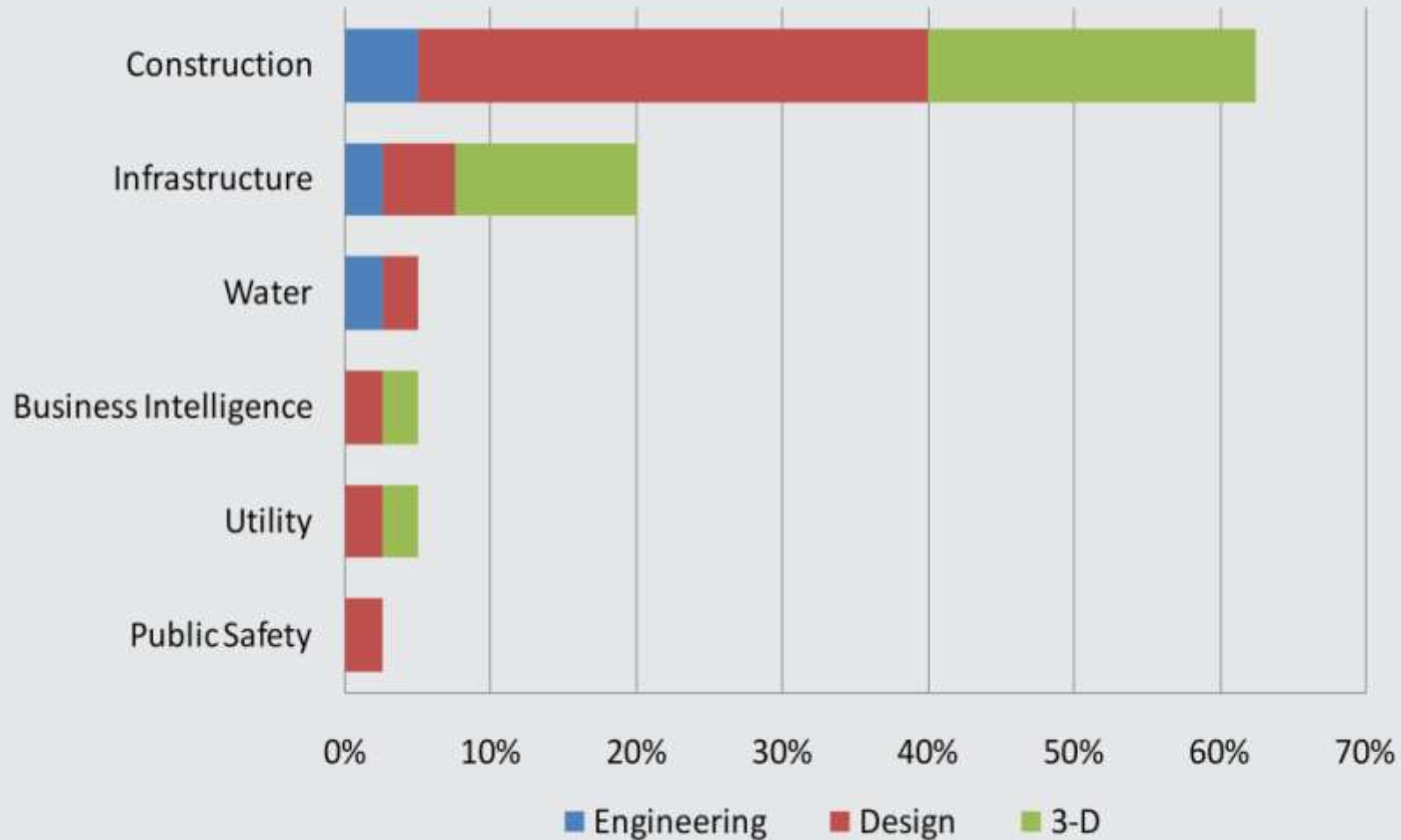
INDUSTRY WISE ADOPTION OF GEOSPATIAL TECHNOLOGIES

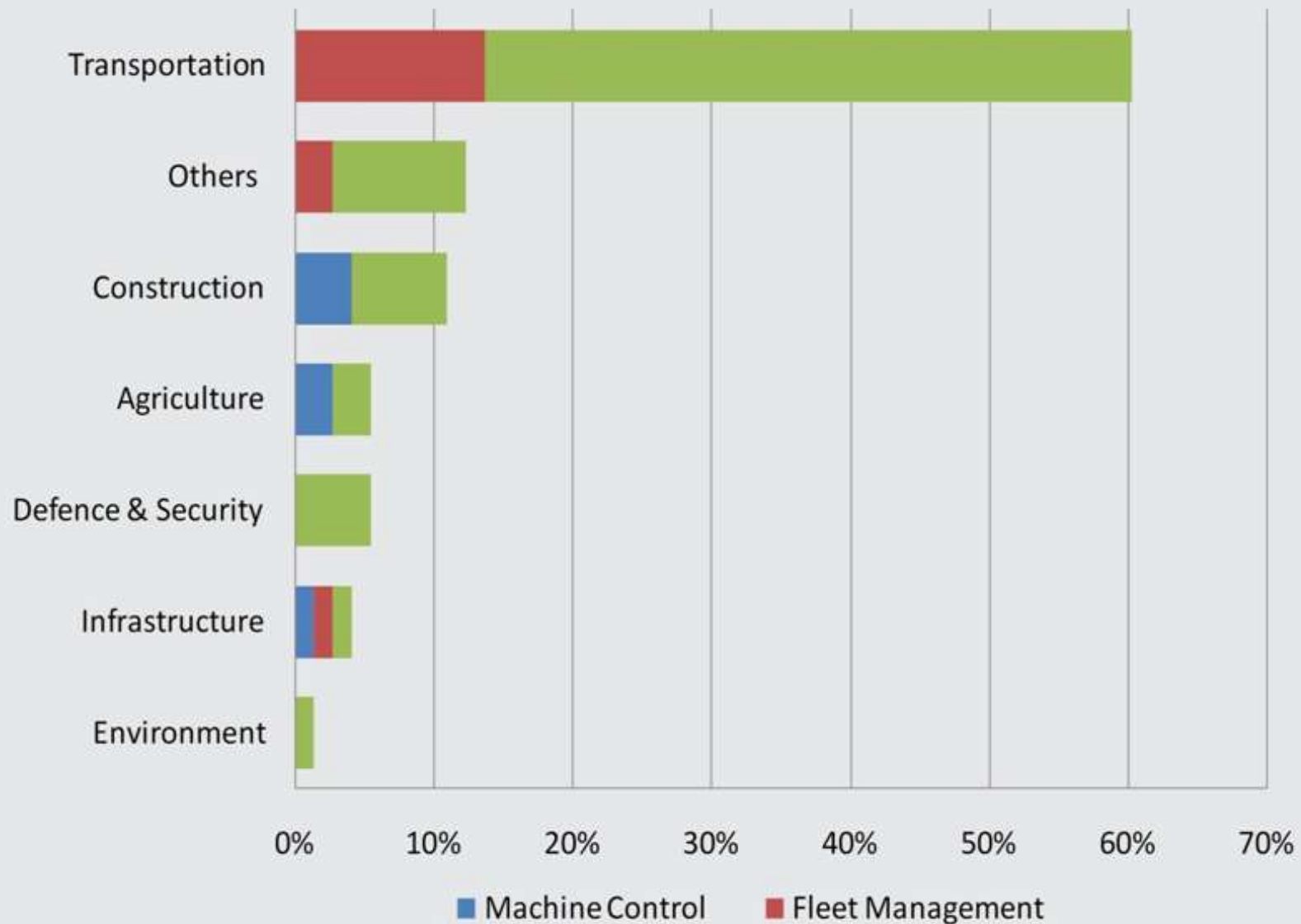


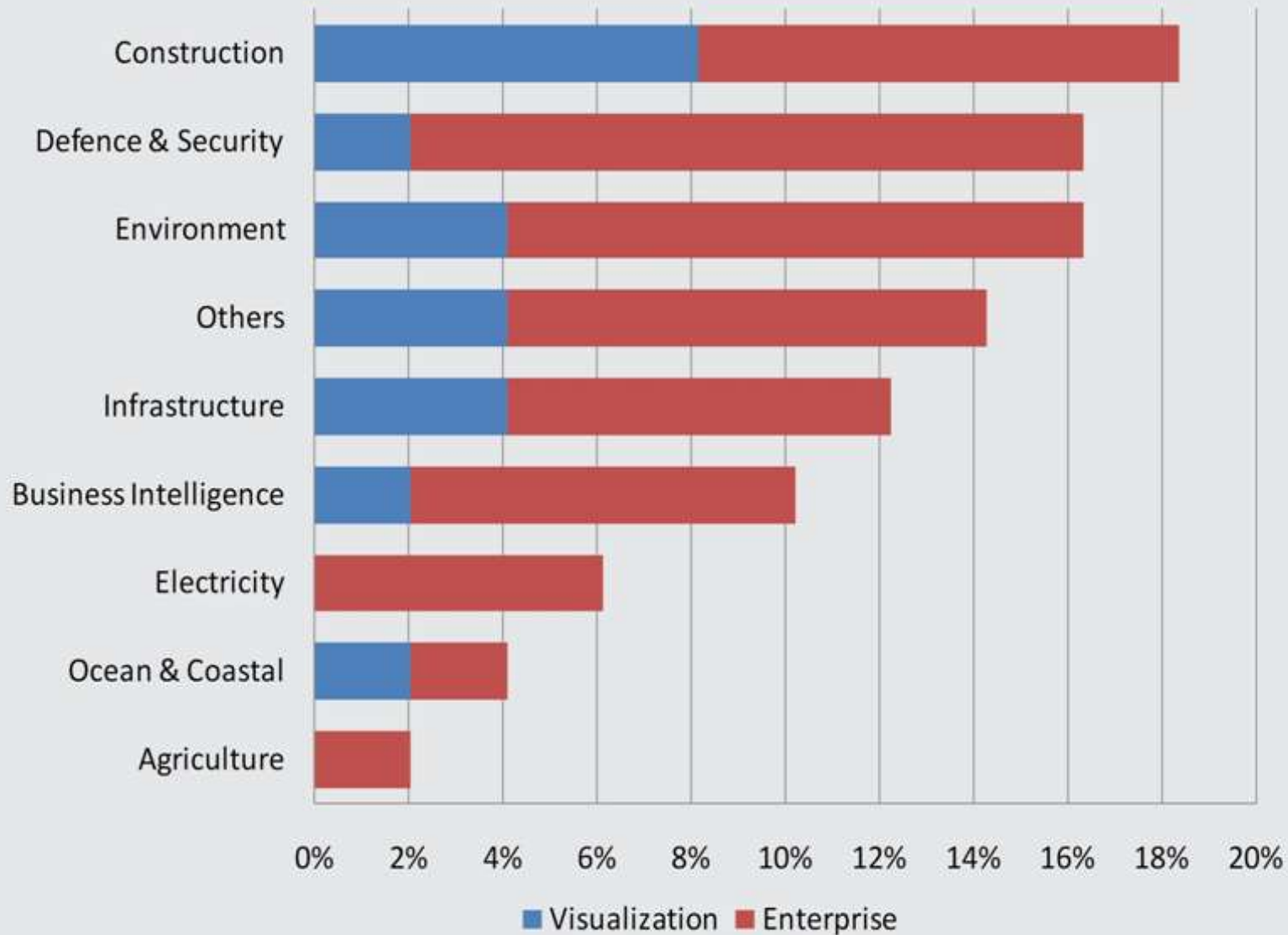
APPLICATION OF EARTH OBSERVATION SYSTEMS



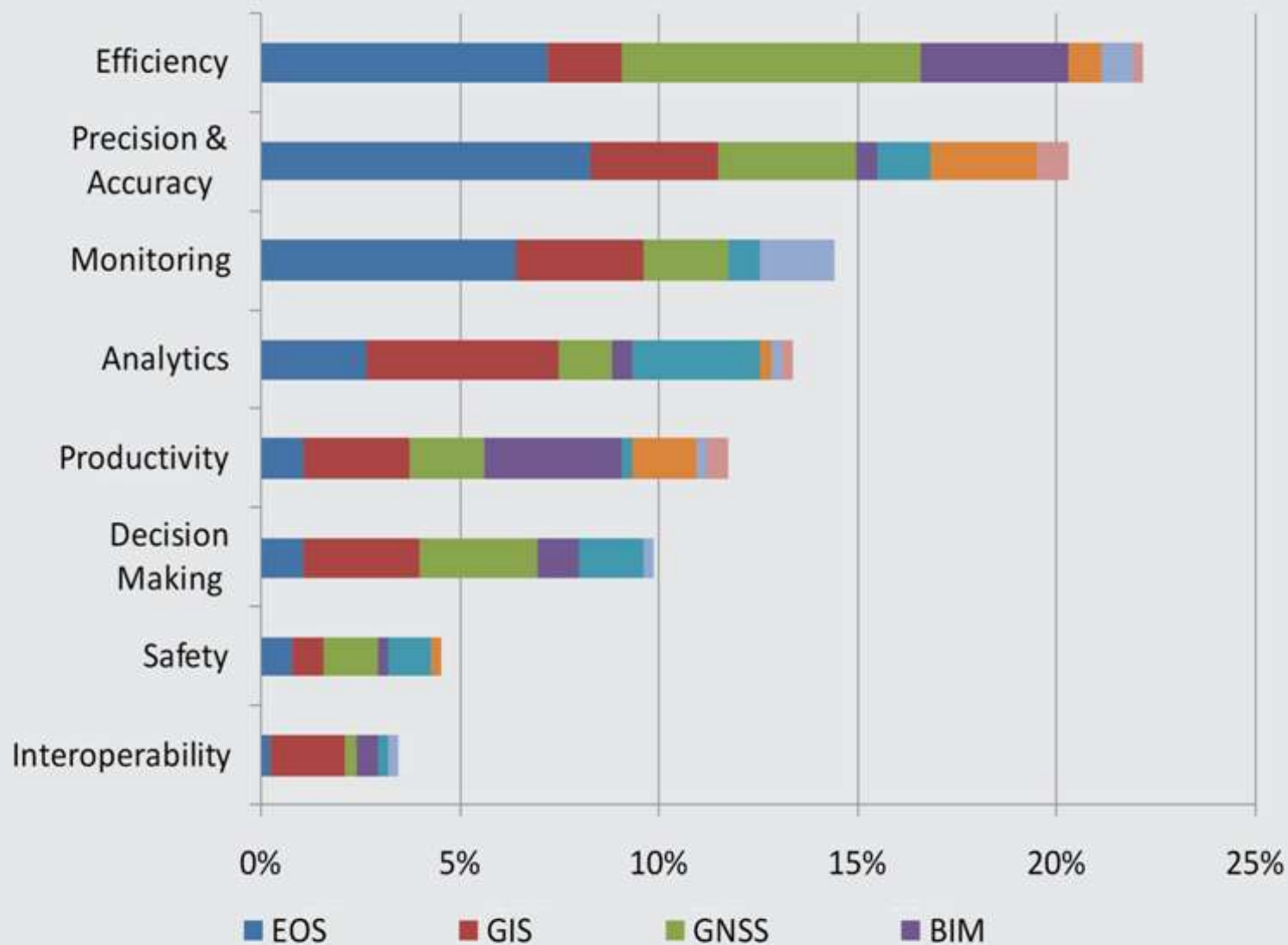
APPLICATION OF BUILDING INFORMATION MODELING



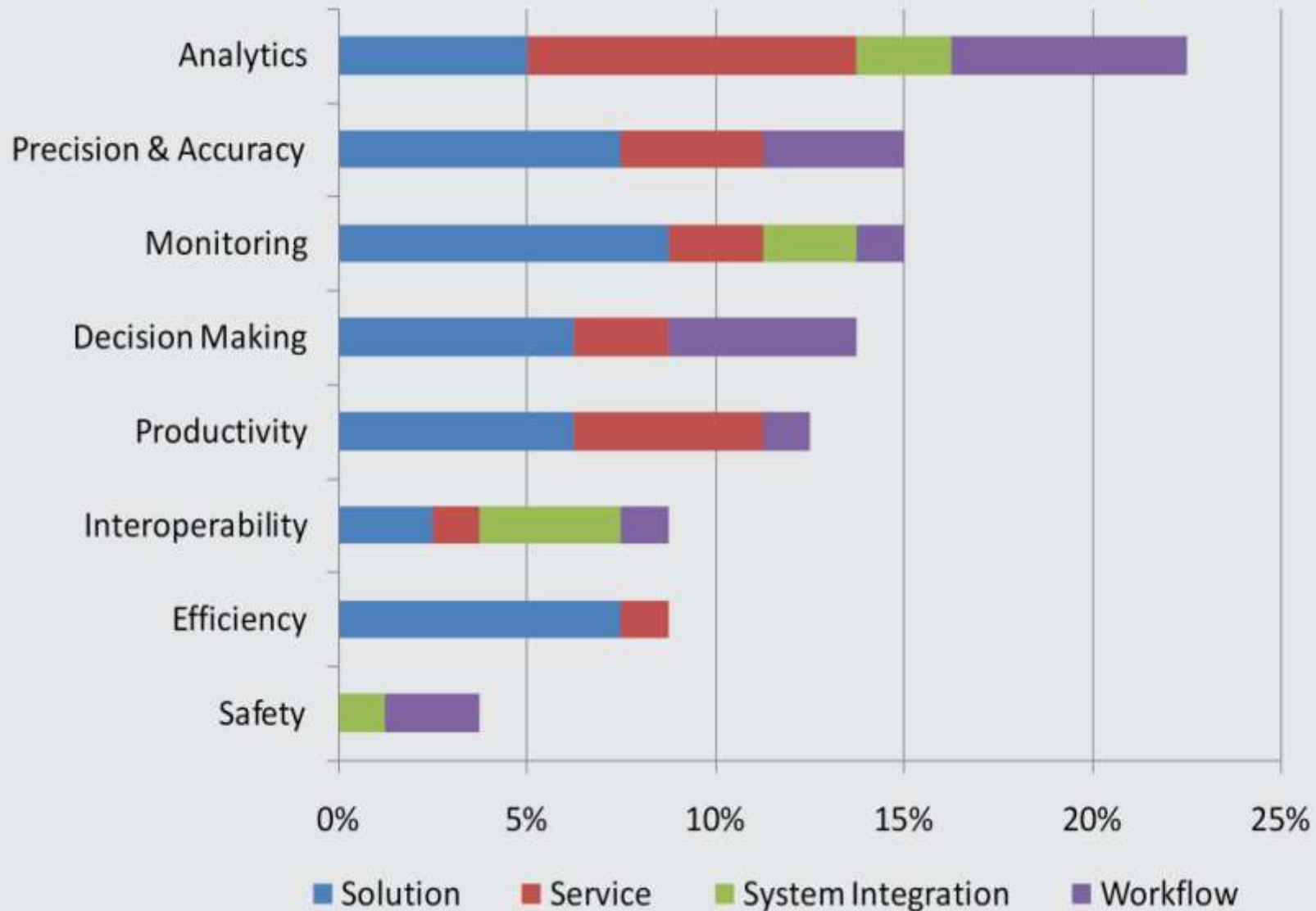




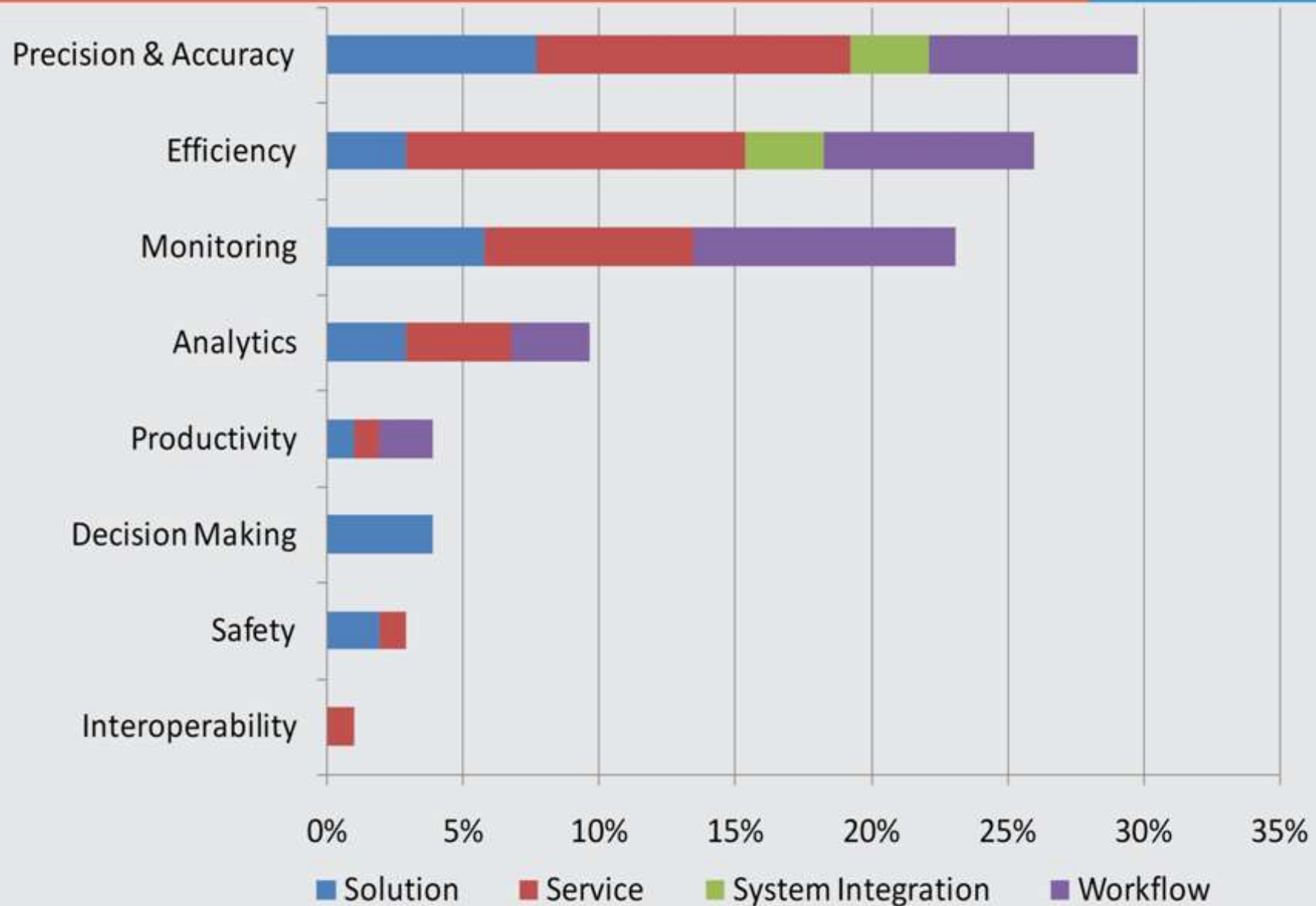
TECHNOLOGY BENEFITS



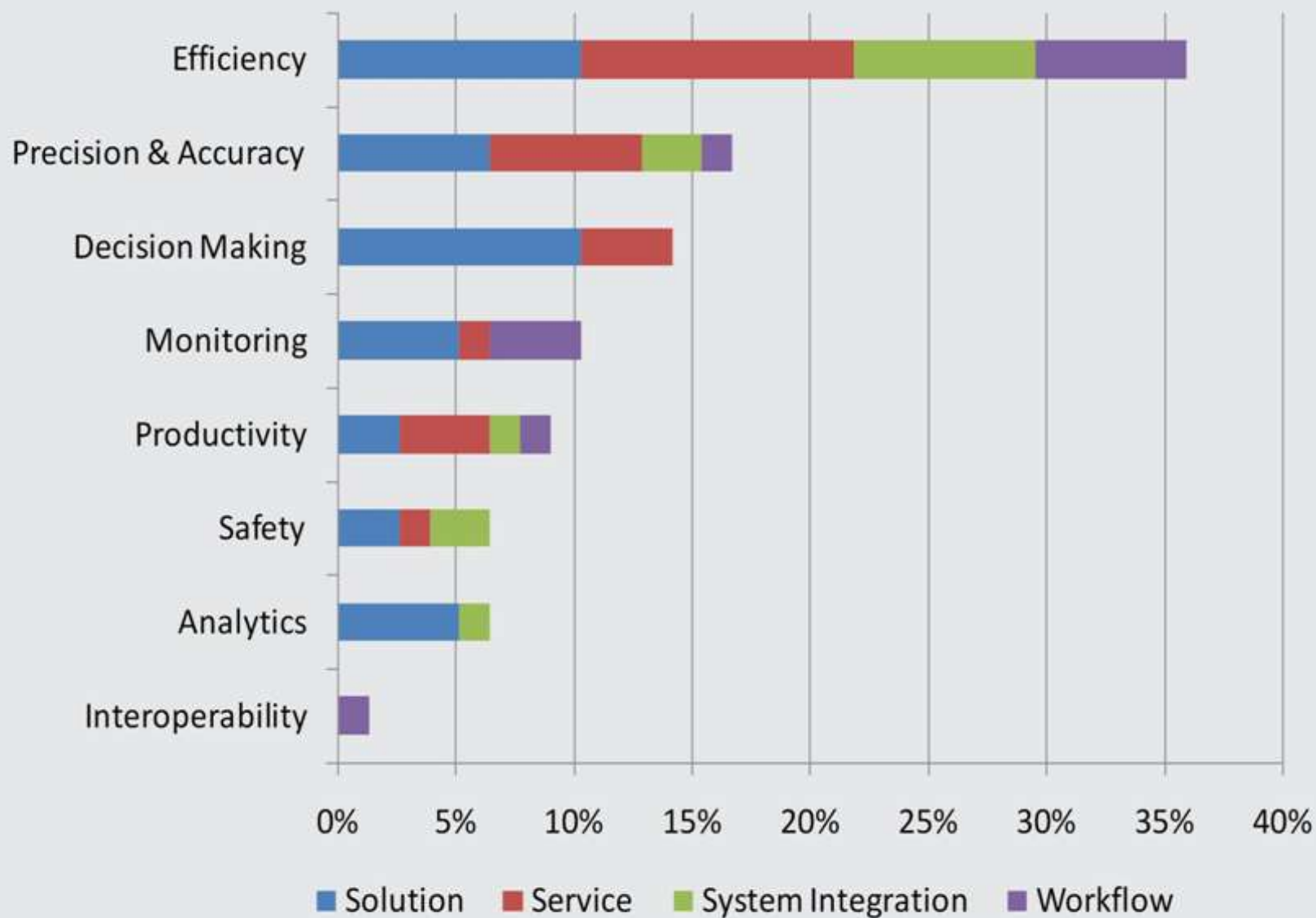
BENEFITS OF GIS TECHNOLOGY



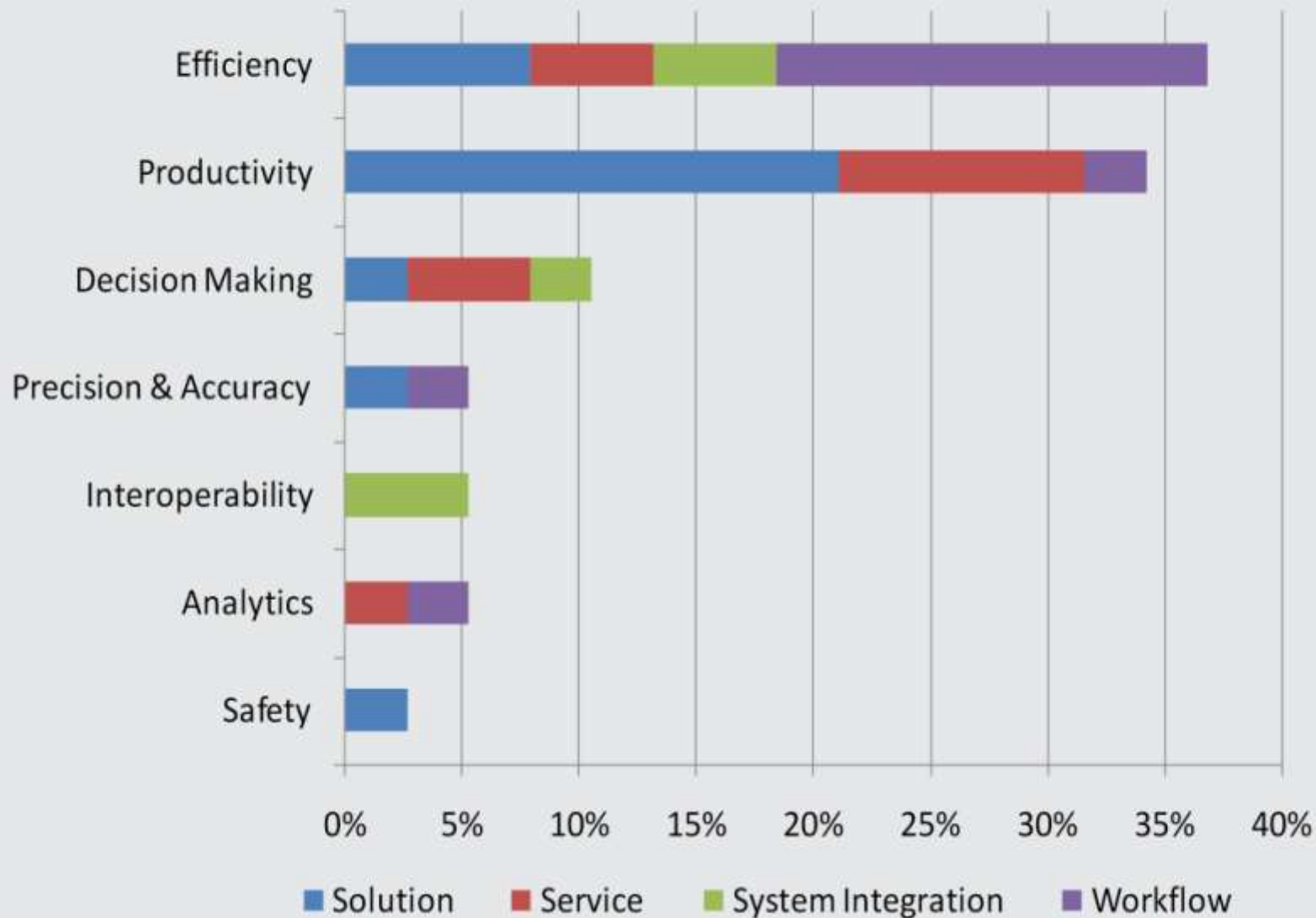
BENEFITS OF EARTH OBSERVATION SYSTEM

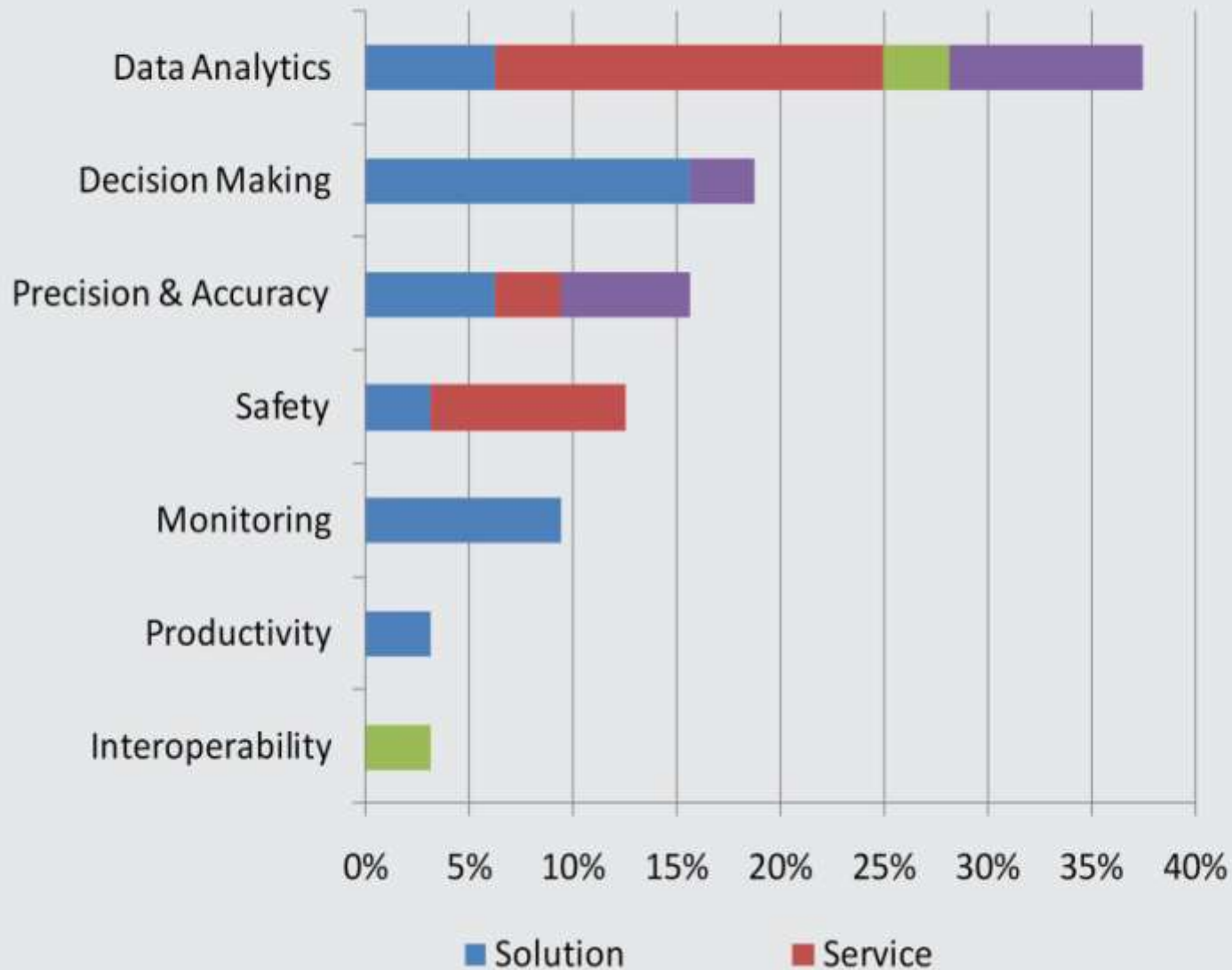


BENEFITS OF GNSS

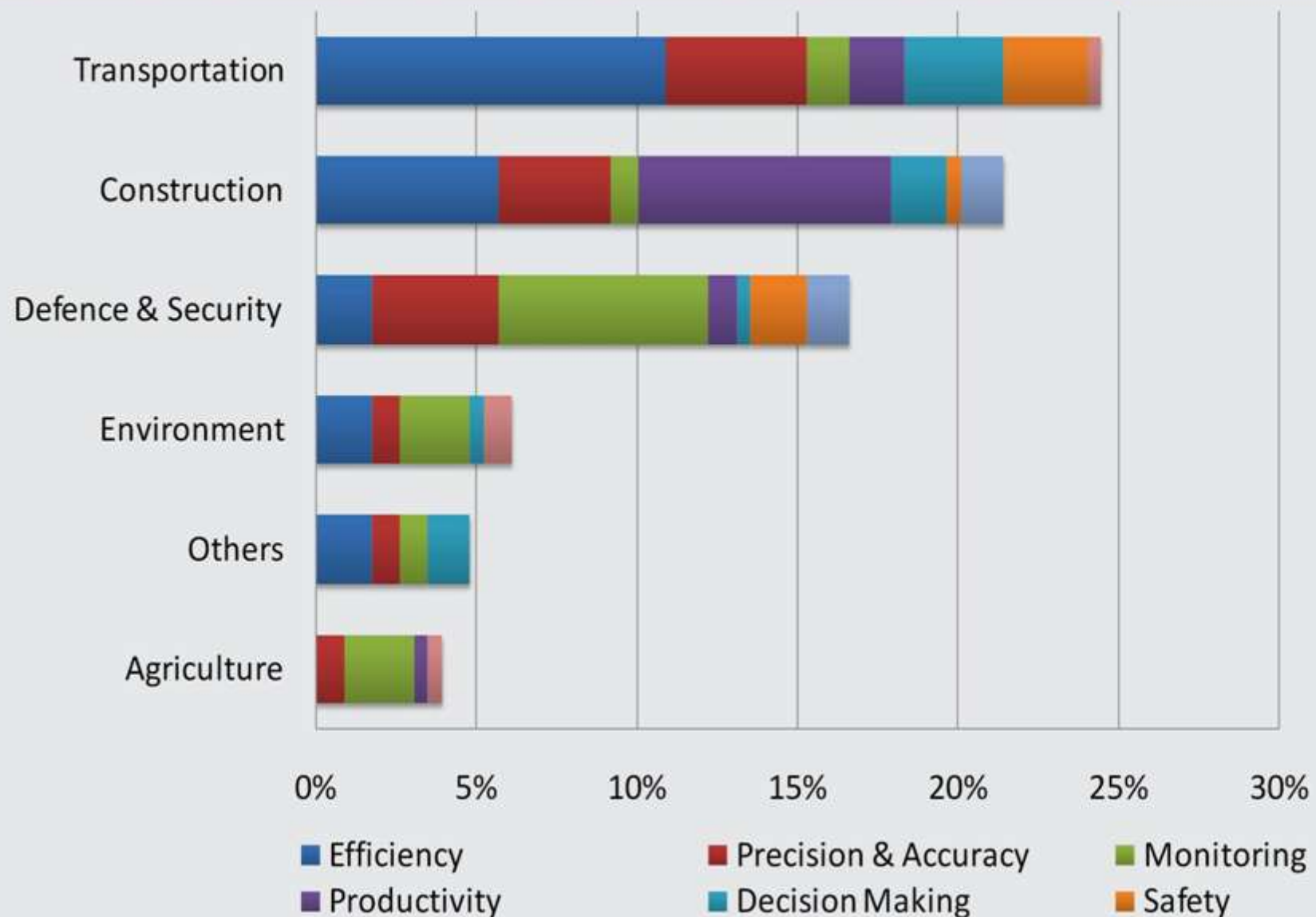


BENEFITS OF BUILDING INFORMATION MODELING





BENEFITS OF INDUSTRIES



BENEFITS OF CONVERGENCE

