

# ON THE RISE

**POPULATION**

**TEMPERATURE**

**MIGRATION**

**CONSUMPTION**

**AIR POLLUTION**





**CLIMATE CHANGE**



**DISASTERS**



**WASTELAND**



**INFLATION**



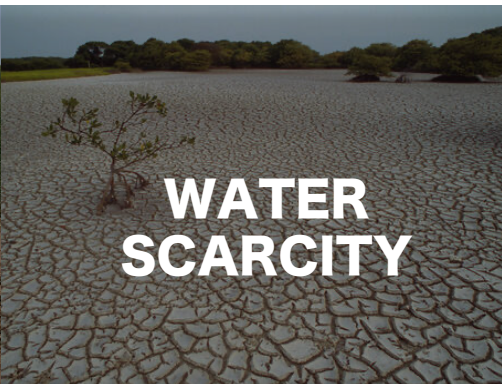
**ON THE RISE**

# CONSEQUENCE

**DIMINISHING**



**DEPLETING AGROFIELDS**



**WATER SCARCITY**



**DEPLETING NATURAL RESOURCES**



**DEPLETING FLORA AND FAUNA**



**DEPLETING VALUE OF WEALTH**

A person is silhouetted against a bright sunset, pushing a large, smooth sphere (resembling a ball or a planet) up a sand dune. The scene is set in a desert landscape with rolling dunes under a sky of orange and blue. The text 'TRANSITION IS INEVITABLE' is overlaid in large, bold, black letters across the center of the image.

**TRANSITION  
IS  
INEVITABLE**

It's all about  
**RESILIENCE**

**ECONOMIC**

**ENVIRONMENTAL**

**SOCIAL**

**INFRASTRUCTURE**

**CULTURAL**

**HUMAN**

**FINANCIAL**

**EQUITY**

**DIVERSITY**

**INCLUSIVITY**

**PHYSICAL**



# SYSTEMS OF SYSTEMS APPROACH

**MEASURE MODEL MONITOR MANAGE**



**PRODUCTIVITY EFFICIENCY TRANSPARENCY COMPLIANCE**

**SUSTAINABILITY OF EVERYTHING**

# GEOSPATIAL

## THE FOUNDATION PILLAR

**DESCRIPTIVE**

**DIAGNOSTIC**

**PREDICTIVE**

**PRESCRIPTIVE**

**HINDSIGHT**

**INSIGHT**

**FORESIGHT**

# **GEOSPATIAL TECHNOLOGY**

**Growing in Relevance and Value-Impact**



**Understanding the Problem**

**Estimating the Resources Available**

**Connecting Different Layers of Information  
for Actionable Intelligence**

**Embedding a Spatial Vision across all  
Workflows**

# Geospatial Industry Market Map - 2023

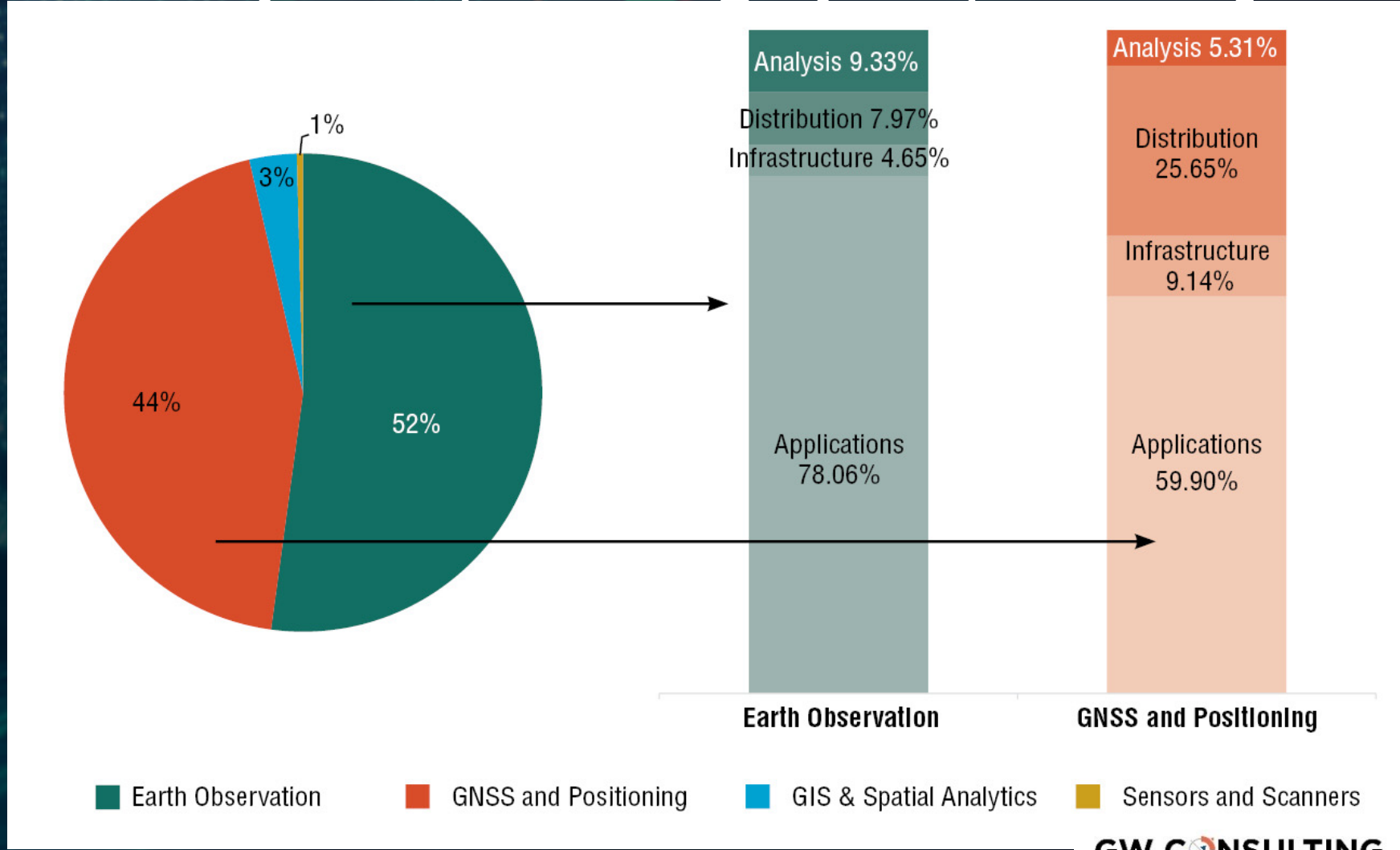
GIS and Spatial Analytics	GIS	HEXAGON	CAPE ANALYTICS	esri	unacast.	ORACLE	FOURSQUARE	Cropin	nearmap	LIGHTBOX	precisely	SuperMap	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson																																					
	Location Intelligence																																nb.ai	esri	ORACLE	FOURSQUARE	Cropin	nearmap	LIGHTBOX	precisely	SuperMap	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson								
	Spatial Analytics																																HEXAGON	CAPE ANALYTICS	esri	unacast.	ORACLE	FOURSQUARE	Cropin	nearmap	LIGHTBOX	precisely	SuperMap	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson						
	Map Content																																HEXAGON	CAPE ANALYTICS	esri	unacast.	ORACLE	FOURSQUARE	Cropin	nearmap	LIGHTBOX	precisely	SuperMap	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson						
Earth Observation	Drones/UAVs	HEXAGON	Trimble	senseFly	SKY-FUTURES™	DJI	Microsoft	UP42	4E	SAFEGRAPH	amazon	what3words	Ecopia	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson																																				
	Aircrafts/Flights																																	HEXAGON	Trimble	senseFly	SKY-FUTURES™	DJI	Microsoft	UP42	4E	SAFEGRAPH	amazon	what3words	Ecopia	here	tomtom	PIXIO	SKYWAY GLOBAL	MapmyIndia	kinetica	wejo	geoiq	Gravy	SatSure	EnviroAnalytics	NIVS	GEOGOSPITAL	mapbox	safetyforce	GroundTruth	CARTO	FOAM	UNL://	Carlson				
	Satellite (Upstream)																																	Synspecive	ICEYE	SKYROOT	GALAXY9	LOCKHEED MARTIN	AIRBUS	SPACEFLIGHT	DHRUYA	ThalesAlenia Space	MAXAR	BLACK SKY	Descartes Labs	URSA	planet.	AXELSPACE	GOMSPACE	pixxel	Capella Space	ASTERRA	SATELLOGIC	VEXCCEL	BOEING	RIEGL	CyPhy	ROTER	Carlson										
	Satellite (Downstream/VAS)																																	EQI	Blue Sky Analytics	Orbital Insight	esri	Microsoft	CGI	amazon	Google	CAPE ANALYTICS	tomorrow.	HowEye™	GEOSAT	BLACK SKY	Descartes Labs	URSA	planet.	AXELSPACE	GOMSPACE	pixxel	Capella Space	ASTERRA	SATELLOGIC	VEXCCEL	BOEING	RIEGL	CyPhy	ROTER	Carlson								
GNSS and Positioning	Indoor Positioning	HEXAGON	Trimble	bluvisian	SMARTPOINT	N	Locafit	Connxient	CLOUDLEAF	BEANS AI	CLOUDLEAF	CISCO	Connxient	orient	IndoorAtlas	SKYHOOK*	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA																																			
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	PNT Satellite																																		HEXAGON	Trimble	bluvisian	SMARTPOINT	N	Locafit	Connxient	CLOUDLEAF	BEANS AI	CLOUDLEAF	CISCO	Connxient	orient	IndoorAtlas	SKYHOOK*	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA		
	Navigation Systems																																		HEXAGON	Trimble	bluvisian	SMARTPOINT	N	Locafit	Connxient	CLOUDLEAF	BEANS AI	CLOUDLEAF	CISCO	Connxient	orient	IndoorAtlas	SKYHOOK*	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA	URSA		
Frontier Technologies	AI (inclusive of DL and ML)	HEXAGON	Trimble	Parker	STONEX	TERZUS	SOUTH	Raytheon Technologies	InfinitiDome	JACKSON LABS	FUGRO	SAFRAN	septentrio	Hemisphere	CHENAV	teodolini	TOPCON	VECTRONAV	septentrio	FARO	RIEGL	Hi-Target	cyclomedia	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT																																		
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	Blockchain																																			HEXAGON	Trimble	Parker	STONEX	TERZUS	SOUTH	Raytheon Technologies	InfinitiDome	JACKSON LABS	FUGRO	SAFRAN	septentrio	Hemisphere	CHENAV	teodolini	TOPCON	VECTRONAV	septentrio	FARO	RIEGL	Hi-Target	cyclomedia	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT
	IoT																																			HEXAGON	Trimble	Parker	STONEX	TERZUS	SOUTH	Raytheon Technologies	InfinitiDome	JACKSON LABS	FUGRO	SAFRAN	septentrio	Hemisphere	CHENAV	teodolini	TOPCON	VECTRONAV	septentrio	FARO	RIEGL	Hi-Target	cyclomedia	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT	WV-SYSTEMS	Inertial Labs	SpacePNT
Solutions and System Integrators	Engineering	HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon																																			
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	Automotive																																		HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	
	Telecommunications																																		HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	
Service Providers	BIM	HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon																																				
	CAD																																	HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon				
Consulting	Engineering	HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon																																				
	Business Intelligence																																	HEXAGON	Trimble	Autodesk	Merkator	ORACLE	GENESYS™	NEMETSCHek GROUP	Amazon	teradata.	Locana	avenga	caserta	Visteon	verizon	cognizant	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon	verizon			

Each category across technologies covers - OEMs inclusive of Hardware, Software, Platform, and Content Providers  
 Number of Companies - 310



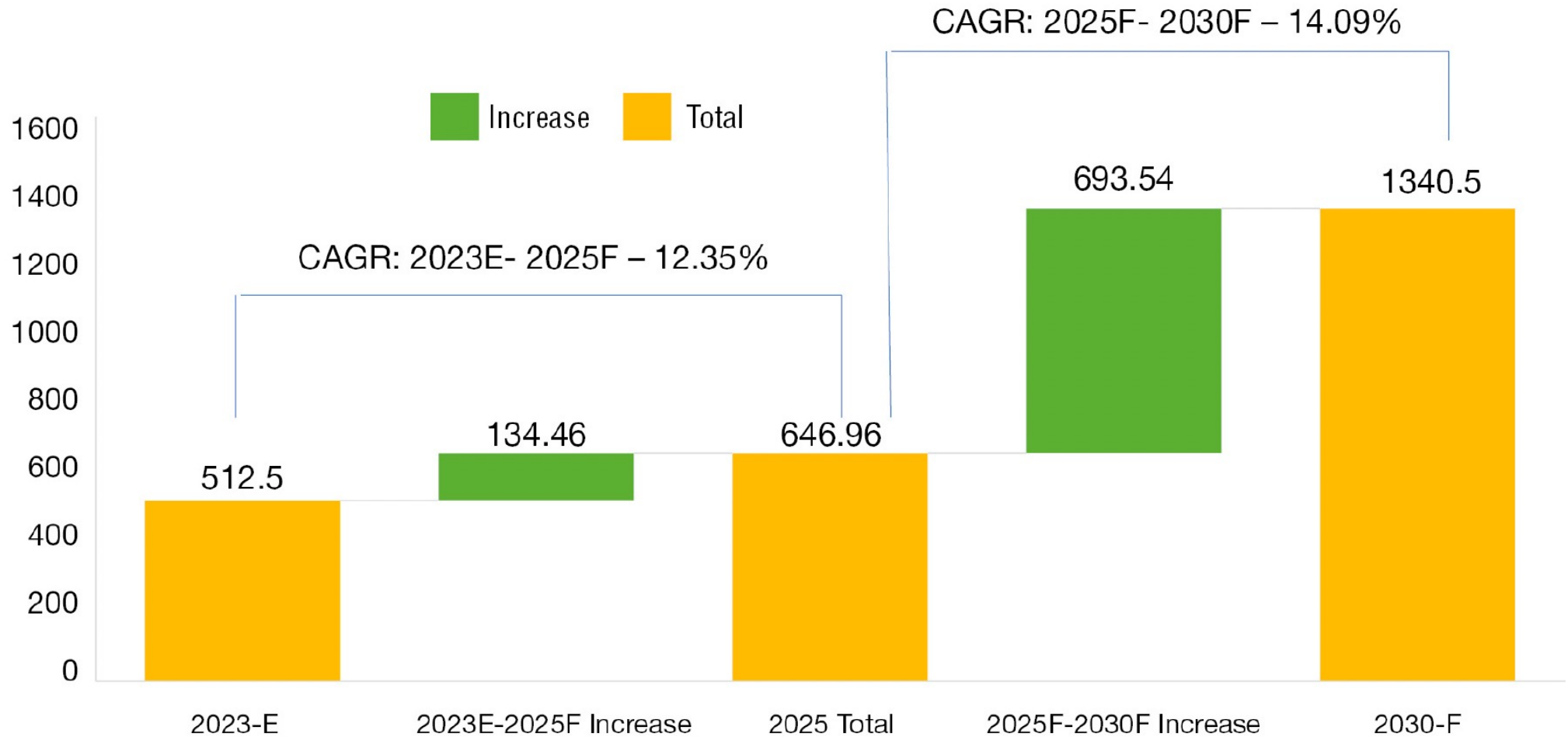
# USD 202.5 Billion

## Worth of Investments (including IPO and SPAC) in Geospatial (including Space) Industry



# USD 512 Bn in 2023 to USD 1.34 Tn in 2030

## Global Geospatial Market



E: Estimated  
F: Forecasted

Source: GW Consulting

Adjusted for 3 percent inflation

# TOWARDS 1.7 TRILLION GEOSPATIAL ECONOMY

NTT DATA

CANATU

ARCADIS

leidos

sisense

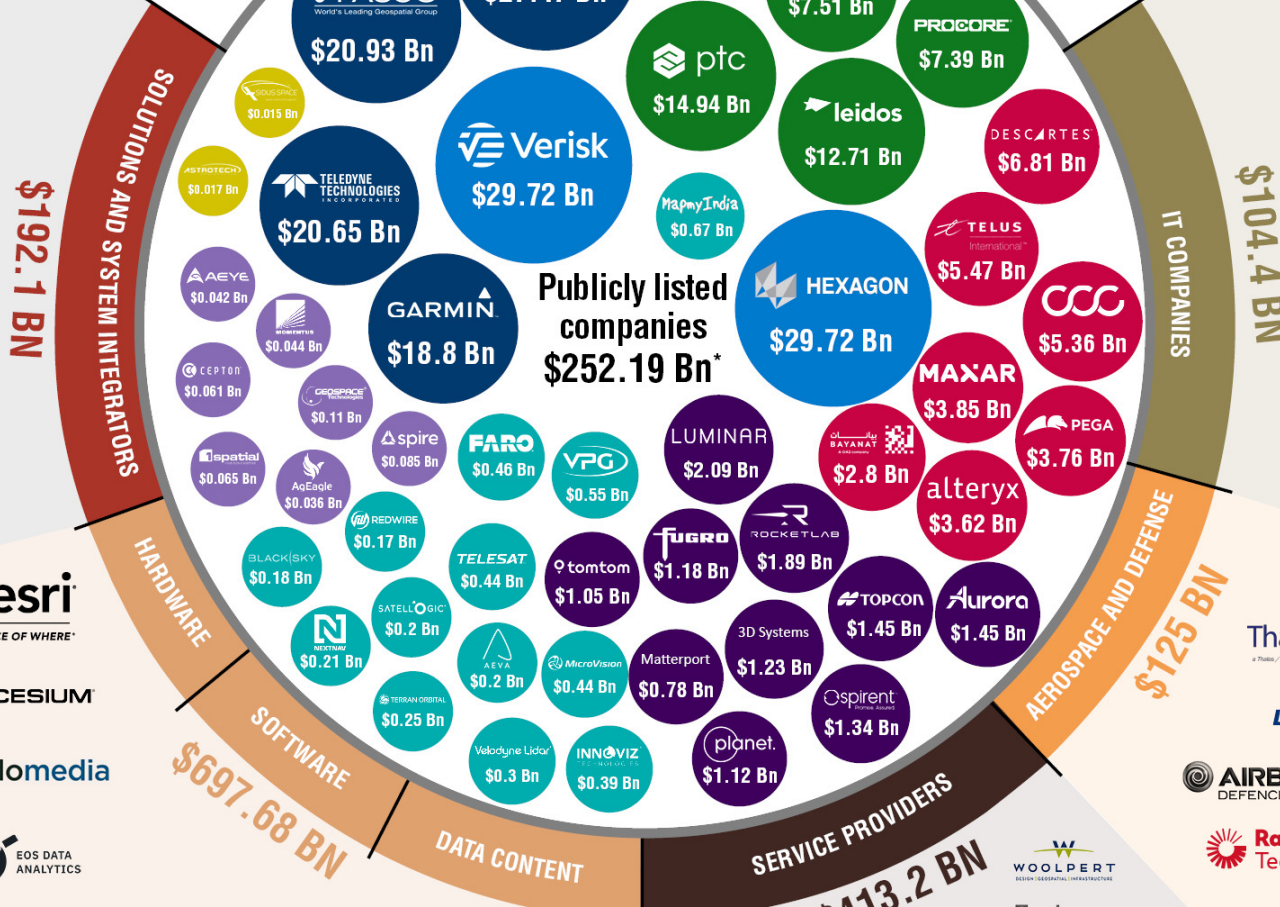
KOMATSU

Merkator

ERICSSON

VOLVO

WSP



Google

Microsoft

Bentley

NVIDIA

AUTODESK

salesforce

Apple

ORACLE

IBM

SAP

esri

here

ICEYE

GroundTruth

TELESPAZIO

RIEGL

Synspective

UP42

what3words

CESIUM

Capella Space

geolQ

SATLANTIS

cyclomedia

EOS DATA ANALYTICS

voxelmaps

ThalesAlenia Space

LOCKHEED MARTIN

AIRBUS DEFENCE & SPACE

Raytheon Technologies

Woolpert

Tech Mahindra

Ball Aerospace & Technologies Corp.

BAE SYSTEMS

BOEING

- More than 29 Bn
- 18 Bn - 29 Bn
- 7 Bn - 18 Bn
- 2.5 Bn - 7 Bn
- 0.6 Bn - 2.5 Bn
- 0.15 Bn - 0.6 Bn
- 0.03 Bn - 0.6 Bn
- Less than 0.03 Bn

RMSI

Geocon

magnasoft

Spatial Vision

HC TECHNOLOGIES

AVINEON

NeoGeo

CYIENT

GENESYS

# **USD 7.5 Trillion**

## **in Direct Economic Impact**

### **(2023)**



# **GEOSPATIAL TRANSITION**

# GEOSPATIAL WORLD

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ADVANCING KNOWLEDGE FOR SUSTAINABILITY