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Image Intelligence Unlocking Business Value in User Domains

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Geospatial World Forum



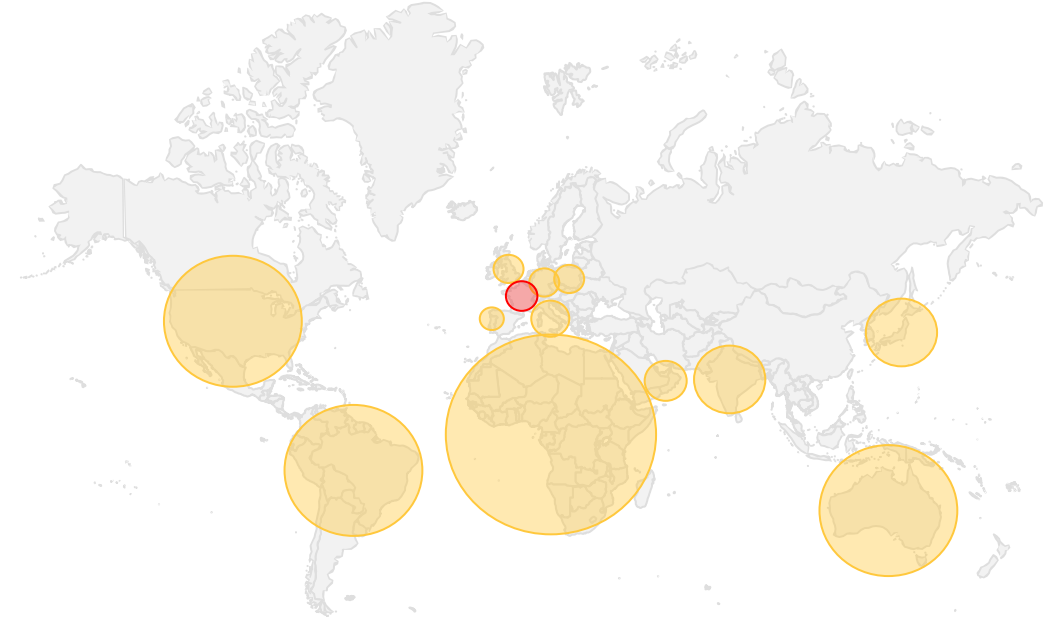
PwC Strategy& has a dedicated Space Practice with a global footprint and a core strategy and transformation-oriented team

Highlights

- A** **Unique among large professional services firms.** It combines focused space expertise with a significant reach into the broader downstream.
- B** Core space team with **diverse background** (technical, business / strategy, legal) and **nationalities**
- C** Scope of the core team encompassing **strategy, policy, socio-economic impact assessments, governance, technology, people and organization, and regulatory**
- D** **PwC Strategy& Insights from Space** offers capacity building to public and private decision-makers
- E** Members of International Astronautical Federation (IAF), European Association of Remote Sensing Companies (EARSC), International Institute of Space Law (IISL), and supporting International Space University, Supaero, UniSA, Leiden Uni, PoliMi

Our International Footprint

● PwC Strategy& Global Space Hub (France) ● PwC Strategy& Space Teams



*Global network of focal points, and teams in key regions
(U.S., JP, DE, IT, UK, ME, IN, AU)*

The geospatial market is growing rapidly with a significant increase in solution providers and demand still driven by the defence sector

Demand Trends

- Military & government customers represent nearly 2/3 of demand
- Regulations are opening up opportunities, particularly in sustainability-related applications
- While demand from domain-specific end users is growing, they are much slower to adopt EO solutions






Supply Trends

- Growing investments in EO have led to an increase in constellations, lowering the price of imagery, increasing resolution and revisit
- Business models evolve into subscription- and volume-based instead of single image purchase
- New technologies are gaining traction (Thermal IR, RO, hyperspectral)

Global Trends

- Strong growth in all geographical areas, with Middle East and Africa expected to experience the highest growth
- The defence domain is expected to remain the largest market
- Infrastructure development is one of the fastest growing end user domains

Geospatial data continues to support a very large number of end-users communities, with specific user requirements

	Key Users	Applications (non-exhaustive)
 Agriculture	Farmers, Governments, Insurance, International organisations	Farm mapping, yield forecasts, nutrient management optimization, crop health monitoring
 Urban Planning	Regional and local governments	City planning and monitoring, traffic management, environment protection, utilities management
 Infrastructure Development	Governments, International Organisations, Construction, Transportation	Site surveying, infrastructure planning, site and asset monitoring
 Natural Resource Management	Governments, International organisations, Energy providers	Water resource management, forest monitoring, biodiversity monitoring, oil & gas monitoring
 Disaster Management	Governments, International organisations	Disaster mapping, early warning, damage assessment, risk assessment

There are numerous benefits that can bring added value to end users across all domains



Long-term cost benefits

While imagery costs can be high, solutions can bring added value to end users in the long-term



Highly scalable solutions

Particularly for international entities and organisations that are interested in integrating solutions at a global scale



Near real-time applications

Ability to have near real-time insights can unlock several opportunities and provide a competitive edge, particularly for commercial end users



Alternative solutions

Replacing some existing solutions can lead to time savings as well as address safety concerns (i.e., using imagery instead of in-situ or in-person activities)

However, there are several barriers to adoption including financial, technical and regulatory considerations

Financial



- High costs for hi-resolution imagery or training employees to use EO imagery
- Challenges in understanding the cost vs benefit to their business
- No KPIs to measure benefits of using EO solutions

Technical



- Challenges in integrating EO imagery into their business
- Uptake limited to end users with more awareness about the sector
- Limitations in additional data needed to meet requirements

Regulatory



- Uptake can depend on regulations that mandate the use of EO solutions

How can the space sector demonstrate the added value of geospatial solutions and effectively increase adoption?



End users at the core

- Identify end user requirements by directly engaging with end users
- Improve standardization of data interfaces for easier integration of solutions
- Understand the current buying habits within end user domains
- Target use cases that can be enabled by regulations



Raise Awareness

- Outreach activities particularly at conferences and events geared towards end user domains
- Offer trainings for end users on how to integrate solutions
- Develop pilot programs with the potential to scale up solutions



Build a concrete business case

- Quantify the benefits and added value of geospatial solutions for end users
- Provide clear pricing options that can be adopted for different types of end users

A grayscale photograph of a space station in orbit above Earth's cloud-covered surface. The station features a central cylindrical module and two large, rectangular solar panel arrays extending outwards. The image is overlaid with a complex pattern of semi-transparent, overlapping triangles in various shades of gray. Two horizontal red lines are positioned above and below the text. In the bottom right corner, there is a small graphic consisting of a white triangle pointing left, a red triangle pointing right, and a gray triangle pointing right, all overlapping.

Thank You!