

30th IAA SYMPOSIUM ON SPACE POLICY, REGULATIONS AND ECONOMICS (E3)
The Demand Side of the Space Economic Equation: Understanding and Evaluating the Changing Market
Dynamics in Space Activities (3)

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MARKET DYNAMICS AND NEW DEMAND TRENDS IN EARTH OBSERVATION: THE CLOUD
REVOLUTION AND A CASE STUDY HIGHLIGHTING THE POTENTIAL OF GEO-SPATIAL
INFORMATION FOR BUSINESS INTELLIGENCE

Abstract

The Earth Observation data and Value-Added Services (VAS) market is experiencing fast disruptive changes, with industry consolidation and vertical integration being paired to a profound transformation of go-to-market strategies. New entrants into the market, as well as a novel interest from large data and cloud storage providers into the hosting of space-based data have opened the door to new value propositions that go beyond the traditional sales of archive data or the provision of ad-hoc data by tasking engagement.

In fact, while EO data and VAS have already made up a steadily growing market over the past decade, (with total data plus VAS revenues growing by 12.8

PwC has conducted an extensive study on the EO downstream market with, among other things, a specific focus on the EU Copernicus programme's role in this evolving landscape. The objective of this study was to highlight the impact of Copernicus in the EO downstream, in order to recommend policies to foster market uptake. The study resulted in resulting in the 2016 Copernicus Market Report and included a deep-dive on the US institutional and commercial market and on current EO market disruptors and trends. This paper aims at providing a view into the main findings of the study, also enriched with additional relevant results from other concurrent studies.

Also objective of this paper is to report on an actual case study highlighting the novel use of EO data for business intelligence, which comes from another recent engagement carried out by PwC, on the use of satellite data in a urban planning development project for the city of Tbilisi in Georgia.