

EARTH OBSERVATION: DEFENSE & SECURITY

2016 Edition | A Euroconsult Executive Report

A 360-degree view of mechanisms to receive data to support defense applications.

- ✓ **60 pages**
- ✓ **Over 40 graphs & tables**
- ✓ **Comprehensive digital files**
- ✓ **Price starting at € 4,000**

The number of countries expected to launch proprietary Earth observation (EO) defense capacity is expected to remain limited, despite increases in global tensions. Under exploration by multiple countries are other avenues to receive data capable of image intelligence (IMINT) applications, such as dual-use and commercial approaches.

Only six countries launched dedicated EO defense capacity over 2006-2015; this number is not expected to differ greatly moving into the next decade. Only a few new entrants are expected, as the high costs and technical know-how to develop and maintain capacity capable of submetric/high geolocation accuracy imaging is an inhibiting factor. A further four countries launched dual-use satellites (implying mixed defense & civil financing & usage), spreading the costs across multiple government departments. Several dual-use systems are expected to be launched over the next decade, such as in Peru, Morocco and Spain; in total, 80 defense/dual-use satellites (discounting U.S. classified programs) are expected to be launched over 2016-2025, a marginal increase over that of the previous decade.

Defense is by far the first destination for commercial EO data, totalling over \$1billion in data sales in 2015, nearly three-quarters of the data being from $\leq 1\text{m}$ ground resolution systems, such as from DigitalGlobe and Airbus Defence and Space. The U.S. NGA remains the single largest procurer of imagery to support defense applications, however non-U.S. markets remain a key growth driver across the commercial data market as a whole. By 2025 it is expected that commercial defense data sales will top \$2 billion (7% CAGR). Asia and Latin America in particular are witnessing a strong uptake in the procurement of commercial data, facilitated by direct access solutions provided by the commercial operators and driven by heightened regional unrest.



ABOUT EARTH OBSERVATION: DEFENSE & SECURITY

Earth Observation: Defense & Security assesses from an economic and political perspective the EO industry focus on defense and security. This is inclusive of national government supply and demand, and commercial solutions being developed to meet some of these requirements – both in manufacturing and in commercial data supply.

HIGHLIGHTS OF THE REPORT INCLUDE:

- ✓ Trends in attitudes towards obtaining data to support defense applications globally
- ✓ Evolutions in supply offerings, government proprietary and commercial solutions
- ✓ Demand forecast for the commercial data markets, and satellites to be launched

A MUST READ FOR:

- ✓ Defense and Intelligence Agencies
- ✓ Satellite Operators
- ✓ Government Space Agencies
- ✓ Satellite Service Providers
- ✓ Satellite Manufacturers

KEY TRENDS, DRIVERS & FORECASTS FOR THE REPORT INCLUDE:

- Current state of the market; satellites launched for defense and dual-use purposes
- Assessment of commercial solutions meeting defense needs, potential for new constellations
- Regulatory and political framework for commercial data in IMINT
- Market values & forecasts for commercial data and satellite procurement and launch (including analysis of trends & market drivers)

SUPPLY-SIDE ANALYSIS (MANUFACTURING & DATA)

- Analysis of data supply to support defense applications
- Government defense programs and initiatives, autonomous satellite capacity, financing mechanisms and areas of cooperation
- Commercial operators as data suppliers: Future initiatives and service offering
- The competitive environment for commercial data, benchmarking and assessment

GOVERNMENT CUSTOMER REQUIREMENTS FOR IMINT/GEOINT

- Government attitudes toward procurement, analysis and benchmarking
- Assessment of growing defense satellite export market
- Requirements and demand for satellite imagery to support defense applications
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