Trends & Strategies for Commercial Remote Sensing

Presented to the NOAA Advisory Committee on Commercial Remote Sensing

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April 27, 2021

NATIONAL GEOSPATIAL NGA INTELLIGENCE AGENCY

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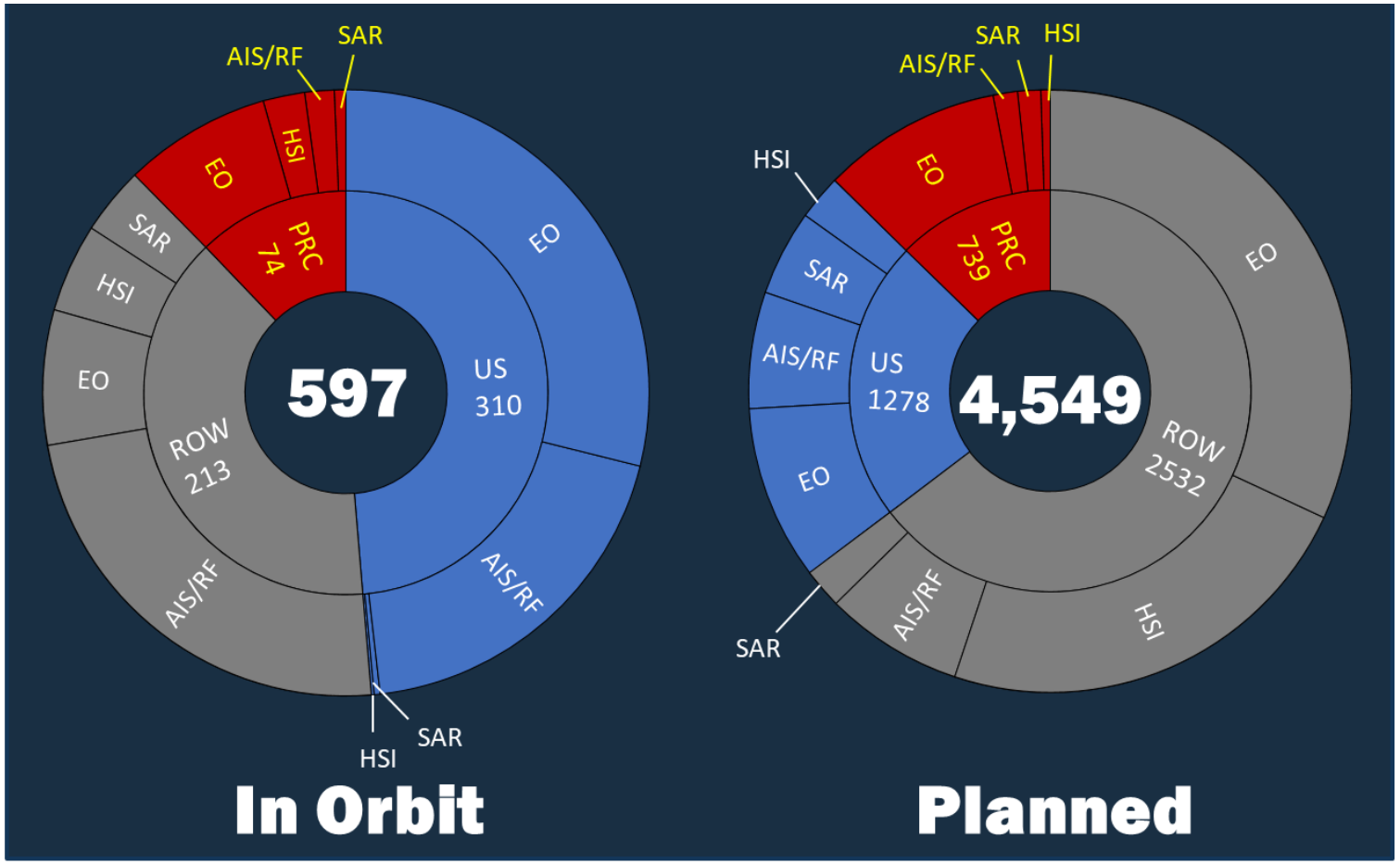
Trends in Remote Sensing

Numbers of CRS Satellites Funded/Operating



**Data from NGA independent market research as of January 2021*

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The Global Competition – Who is winning?

THE CATEGORIES IN COMMERCIAL REMOTE SENSING

Best Panchromatic Resolution	Best Electro-Optical (EO) Persistence (Average Revisit)	Best Shortwave Infrared (SWIR)
Best Synthetic Aperture Radar (SAR) Resolution	Best SAR Persistence (Average Revisit)	Best Midwave Length Infrared (MWIR)
Best Video	Best Multispectral Imaging (MSI) (4+ Bands)	Best Hyperspectral Imaging (HSI) (20+ Bands)

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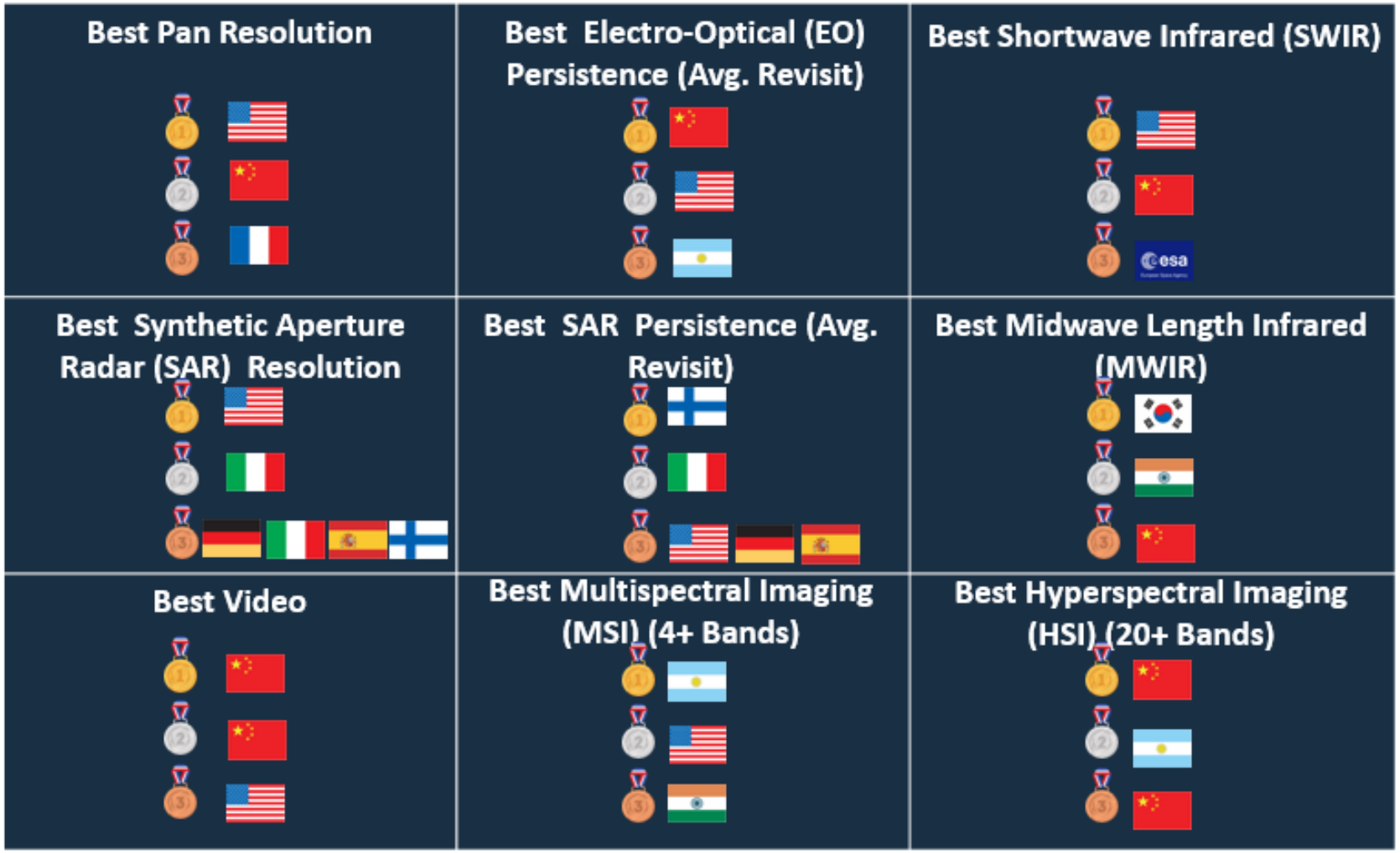
The Global Competition – Who is winning TODAY?



**All rankings based on NGA unclassified independent market research*

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The Global Competition – RESULTS

TODAY: April 2021

Medal Counts	Gold	Silver	Bronze	Total Medals
China	3	3	2	8
United States	3	2	2	7
Argentina	1	1	1	3
Italy		2	1	3
Finland	1		1	2
India		1	1	2
Germany			2	2
Spain			2	2
South Korea	1			1
France			1	1
ESA			1	1

If we held a Commercial Olympics today, the U.S. and China are neck-and-neck. China is beginning to pull head ahead in terms of terms of spectral diversity.

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GEOINT for Decision Advantage

Managing the rapid growth of GEOINT data, products, and services

—especially from commercial suppliers

*Icons and images notional or representational

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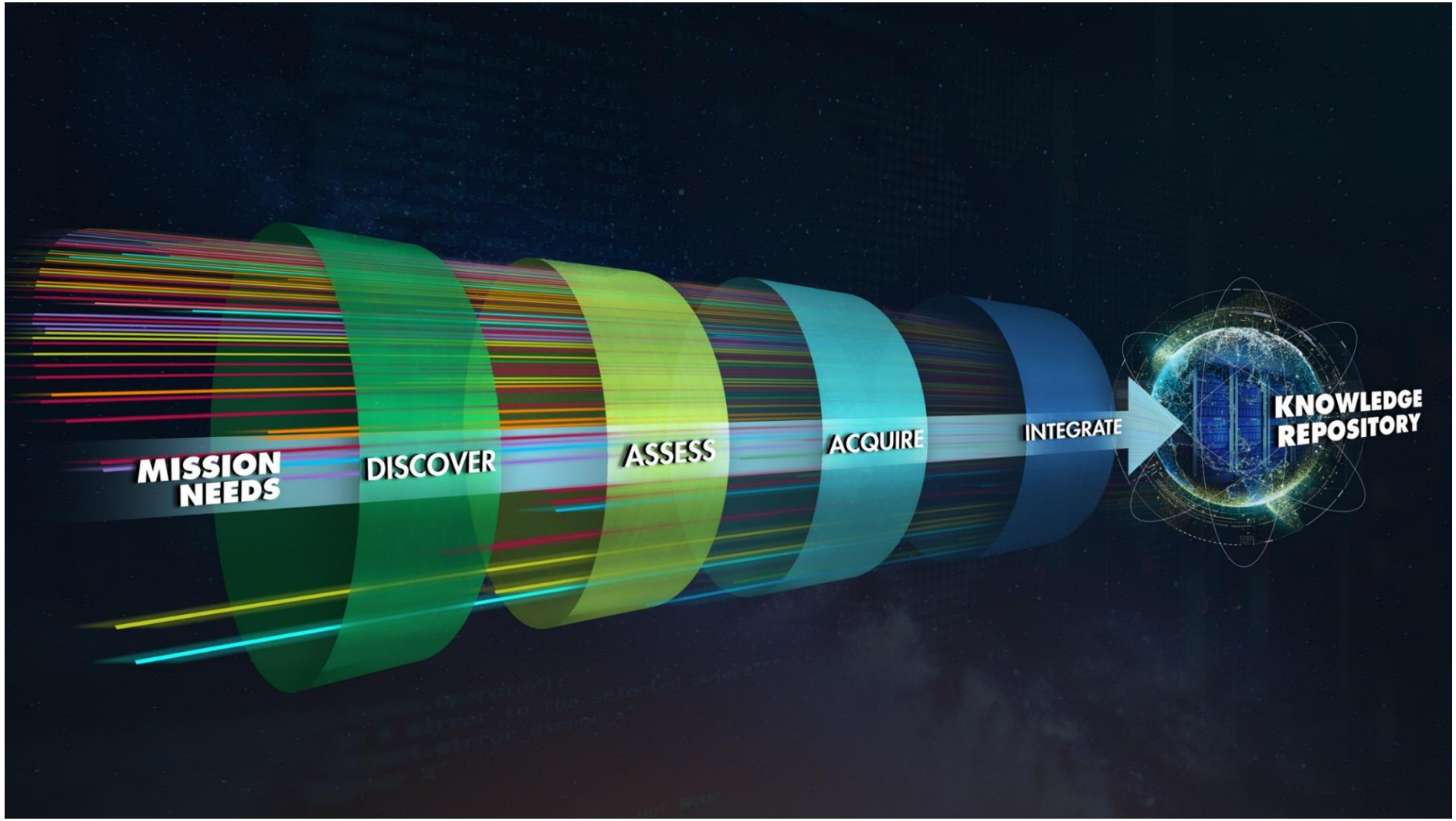
Moving From Offerings to Operations



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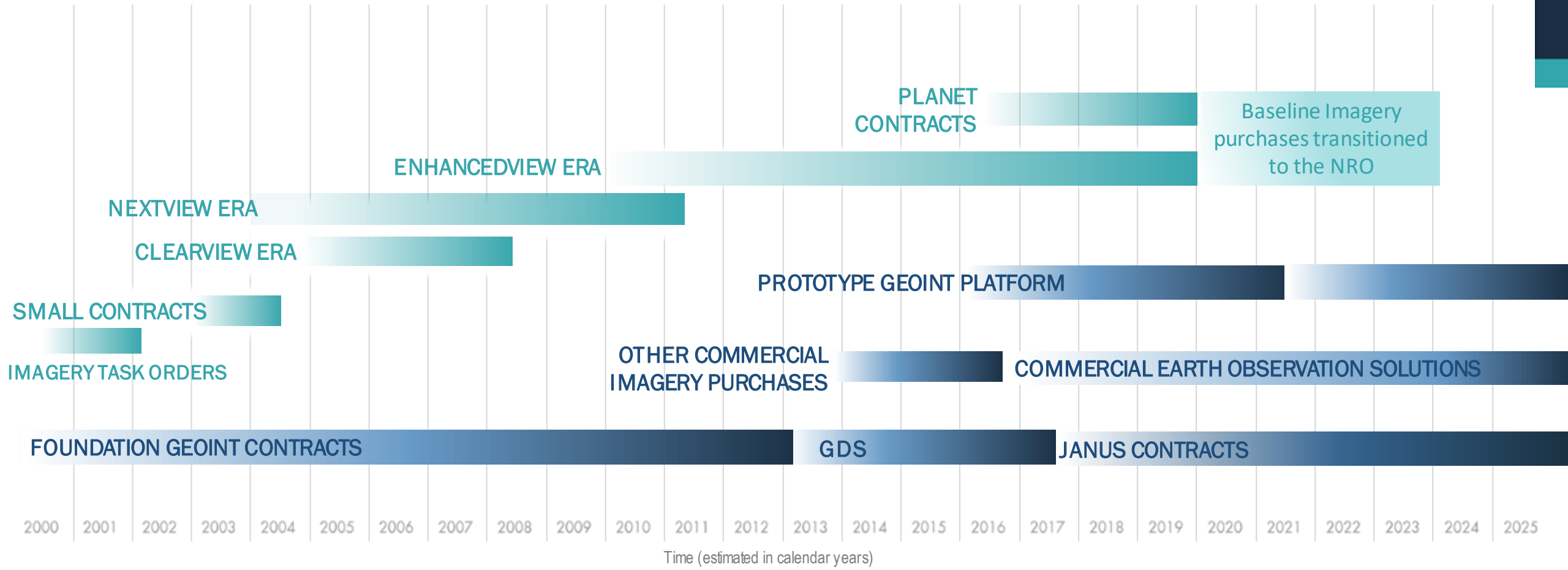
EVOLVING Relationship with Industry



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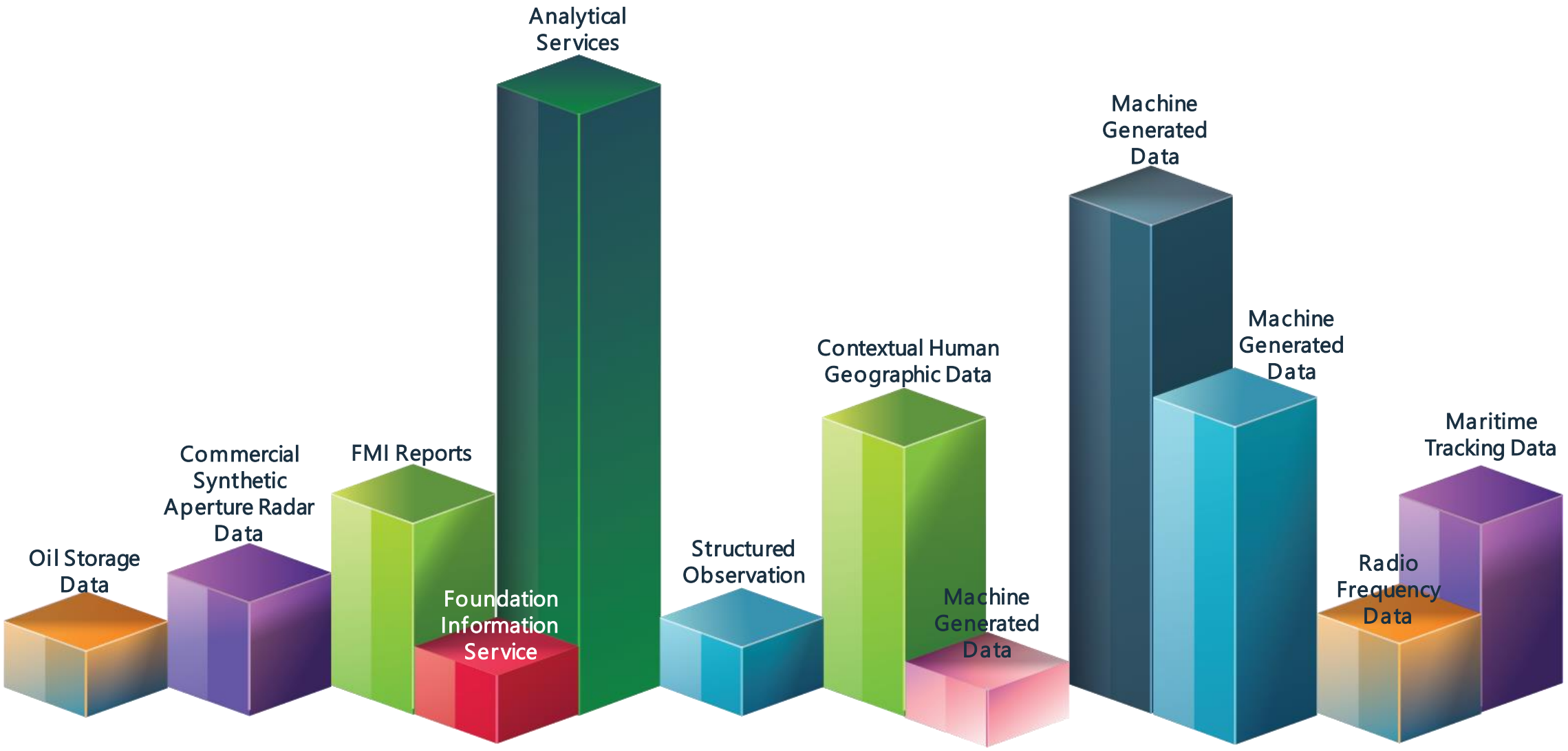
Fiscal Year 2020 Commercial GEOINT Contracts



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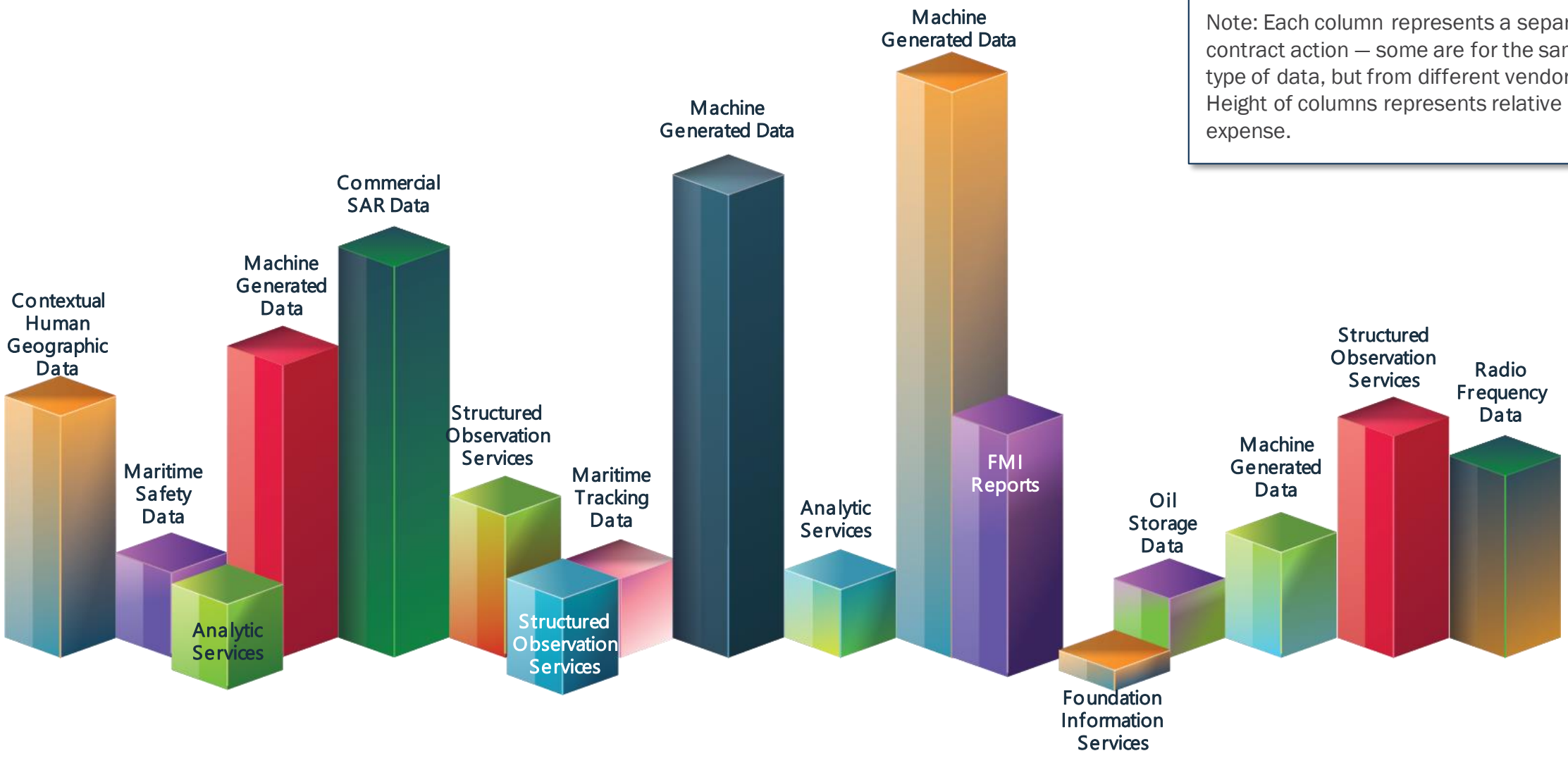
Fiscal Year 2021 Commercial GEOINT Contracts



Note: Each column represents a separate contract action — some are for the same type of data, but from different vendors. Height of columns represents relative expense.

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IC Commercial Space Council

Three key lines of effort:

- Deepen IC understanding of the global space industry
- Recommend IC level strategies and policies
- Support a robust U.S. commercial space industry to be responsive to IC needs

Four working groups:

- Commercial Remote Sensing Working Group
- Commercial Radio Frequency Working Group
- Commercial Space Operations Working Group
- Commercial Outreach & Engagement Working Group

Five voting member agencies: CIA, DIA, NRO, NGA, and NSA

ICCSC est. 8Oct2020

Expert policy advice to leadership

Rapid coordination across stakeholders

Structured engagement with U.S. industry

11

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