

Concept Note

INDIA SAUDI ARABIA SPACE & GEOSPATIAL BUSINESS SUMMIT

December 2, 2024 | Hyderabad, India



Geospatial Data Promotion
and Development
Committee (GDPDC)



GEOSPATIAL
WORLD
ADVANCING KNOWLEDGE FOR SUSTAINABILITY



Cooperation Between India And Saudi Arabia

India and Saudi Arabia have traditionally enjoyed warm relations, particularly in the commercial sector, with Saudi Arabia being India's fourth largest trade partner. Bilateral trade has been thriving, and cooperation in Defense and civil aviation has increased in recent years. Diplomatic relations were established after India gained independence in 1947, and ties have strengthened through visits by Indian Prime Ministers.



Indian Geospatial Market

The Indian government has recognised the critical role of geospatial technology across diverse sectors such as agriculture, urban planning, infrastructure development, disaster management, Defense, and transportation. Initiatives aimed at promoting the use of geospatial data and technology have been pivotal in this regard. A cornerstone of these efforts is the Digital India programme, which seeks to empower India digitally, enhancing governance and service delivery. Complementing this initiative is the National Geospatial Policy of 2022, which establishes clear guidelines for the acquisition, dissemination, and utilisation of geospatial data within the country.

These policy measures not only facilitate efficient resource management and decision-making but also foster innovation and economic growth across sectors.

The Indian geospatial industry is undergoing a significant transformation, evolving from a data-centric approach to one focused on knowledge and solutions. Bolstered by recent policy reforms, this industry is poised to become the bedrock of India's digital infrastructure, offering immense socio-economic benefits.

By leveraging advanced geospatial technologies, such as remote sensing, GIS and spatial analytics, India is enhancing its capabilities in areas ranging from precision agriculture to smart city development and disaster resilience. This transformation underscores the industry's potential to drive inclusive growth, empower local communities, and contribute substantially to India's journey towards becoming a global leader in geospatial innovation.

Indian Geospatial Industry Outlook



India's domestic geospatial market is estimated to grow at a significantly high CAGR, i.e., approximately **13.5 percent** between 2021 and 2025. The market is forecasted to rise from **INR 13 thousand crores (approximately 1.65 billion USD)** in 2021 to INR 23 thousand crores (approximately USD 2.5 billion) in 2025.



India's GNSS and Positioning to hold approximately **60 percent** market share in 2022, followed by GIS and Spatial Analytics market with approximately **23 percent** of the total market share.



GIS and Spatial Analytics and Earth Observation (Satellites/Drones) to drive the Indian Geospatial Market between 2022 and 2025.



The geospatial market of India in 2022, and 2025 is dominated by Defense and Intelligence, Urban Development, and Utilities sector. Together in 2022, these sectors accounted for 39 percent, up from 38 percent in 2021 – with each sector accounting for approximately **14 percent, 13 percent, and 11 percent**, respectively.

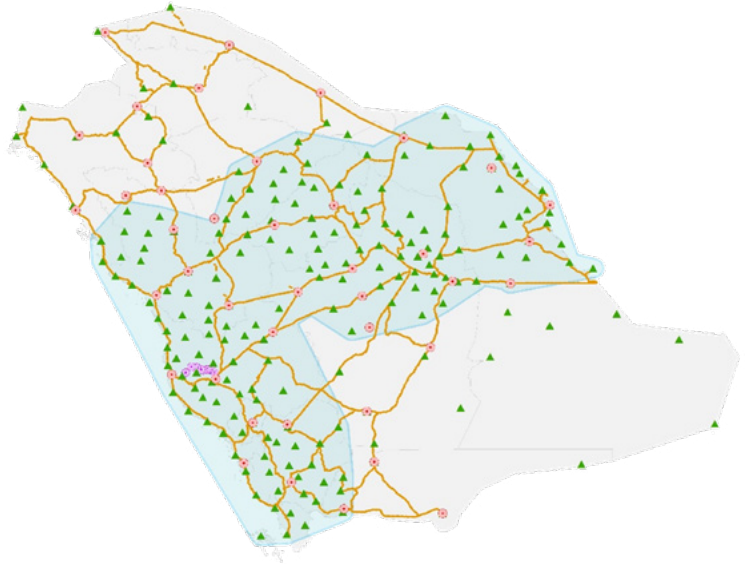
Kingdom of Saudi Arabia Geospatial Market

The Kingdom of Saudi Arabia is increasingly recognising the strategic importance of geospatial and space technologies in its national development agenda. As part of its ambitious Vision 2030, the Kingdom of Saudi Arabia aims to leverage advanced geospatial, BIM, and Digital Twin technologies to diversify its economy away from oil dependency, enhance urban and regional planning, and bolster environmental and disaster management.

The General Authority for Survey and Geospatial Information, and the Saudi Space Commission, play a pivotal role in orchestrating the nation's geospatial information and space strategies respectively. This includes driving collaborations on geospatial information, geodetic infrastructure management, standards and interoperability, geospatial data services, and satellite technology, which support improvements in key priority sectors laid out for the Kingdom in its Vision 2030.

Further complementing these endeavors is the National Spatial Data Infrastructure (NSDI) program that facilitates the sharing and utilization of geospatial data across governmental entities, aiming to enhance decision-making and operational efficiency. The Kingdom of Saudi Arabia's geospatial framework is poised for transformation, and augments government-backed initiatives and significant investments in smart city projects like NEOM.

These projects are designed to incorporate cutting-edge technologies in urban planning, transport management, and infrastructure development. By integrating advanced geospatial and space technologies, the Kingdom of Saudi Arabia is setting the stage for significant socio-economic development, aspiring to become a global hub for geospatial innovation and a leader in the space sector in the Middle East.



Kingdom of Saudi Arabia Geospatial Market



The Kingdom of Saudi Arabia's Geospatial Market is forecasted to increase from **SAR 13.5 billion (USD 3.65 billion)** in 2022 to **SAR 23 billion (USD 6.22 billion)** in 2025, growing at a CAGR of **19.5 percent**.



Of the **SAR 13.5 billion** geospatial market, approximately, **SAR 5.5 billion (USD 1.5 billion)** is the domestic market - while the remaining **SAR 8 billion (USD 2 billion)** is the technology import market. This shows heavy reliance of most national projects and programs on geospatial services, solutions, and OEM's of the west.



Of the total geospatial market of the Kingdom of Saudi Arabia, the service segment (inclusive of surveying and mapping, and visualization tools) contributes **60 percent** - highlighting that the geospatial maturity within the Kingdom, inclusive of transition from services to solutions is at a nascent stage.



Key Milestones in Bilateral Relations

2010: The 'Riyadh Declaration' was signed, elevating the relationship to a strategic partnership. Key agreements included an extradition treaty and MoUs between ISRO and King Abdul Aziz City for Science and Technology for cooperation in peaceful use of outer space.

2016: Focus on energy, security, trade, and the well-being of the Indian diaspora.

2019: Signing of the 'Strategic Partnership Council Agreement,' identifying India as one of Saudi Arabia's 'Strategic Partner Countries.'

Defense Intelligence Cooperation

Defence cooperation between India and Saudi Arabia has been strengthened with events such as meetings of the Joint Committee on Defence Cooperation, signing of the 'Strategic Partnership Council Agreement', bilateral exchanges involving the armed forces, especially the maritime wings and signing of an MoU between Saudi General Authority of Military Industries and India's Department of Defence Production. Among other benefits, these measures are expected to ensure security in the crucial western Indian Ocean Region



- **2012:** The first visit by an Indian defence minister to Riyadh.
- **2014:** Signing of a Memorandum of Understanding (MoU) on Defence Cooperation, enhancing the partnership and establishing the Joint Committee on Defence Cooperation (JCDC) to discuss training, intelligence exchange, maritime security, and defence industry promotion.

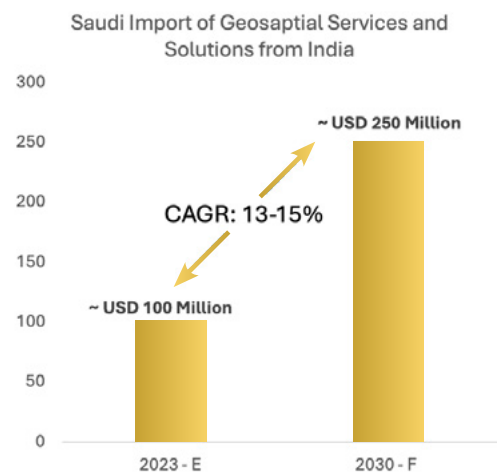
Cooperation in Commercial Geospatial Trade and Commerce

On the geospatial and space side, India and Saudi Arabia have forged dynamic and robust partnerships, reflecting their strategic and economic interests. These collaborations driven by the national geospatial agencies, and the private sector aims to leverage India's advanced capabilities in satellite technology, data analytics, and urban development, aligning with Saudi Arabia's ambitious Vision 2030 initiative. The bilateral engagements encompass various aspects such as satellite launches, geospatial data services, smart city projects, training programs, and joint research and development initiatives. These efforts not only enhance technological cooperation but also contribute significantly to the broader strategic goals of both nations.

For instance, in recent years, India and Saudi Arabia have strengthened their collaboration in geospatial and space sectors. ISRO has launched several satellites for Saudi Arabia, such as the GSAT-30 in 2020, with an estimated three-five satellite launch agreements in the last five years. Indian geospatial data services are involved in major urban development projects like NEOM, ROSHN, Red Sea Global, for 3D Digital Twin mapping of Mecca, contributing to more than ten key projects in urban planning and smart infrastructure, providing mapping, and geospatial data services.

The General Authority for Survey and Geospatial Information (GEOSA), the National Geospatial Agency of the Kingdom of Saudi Arabia has also awarded several contracts to Indian companies for surveying and mapping services. Many Indian firms are currently involved in numerous projects of the Kingdom, providing comprehensive geospatial services and demonstrating their expertise in large-scale land surveying, marine and terrestrial surveying, topographic mapping, 3D Digital Twin mapping, GIS-based solutions and BIM services supporting critical infrastructure and environmental projects. While precise numbers are challenging to pinpoint, the overall estimate suggests that Indian companies have secured approximately 15-30 significant deals and collaborations in Saudi Arabia's geospatial and space sectors in recent years. This estimate encompasses satellite launch agreements, geospatial data services, smart city projects, training programs, and R&D collaborations. The strategic partnership and mutual interests between the two nations imply continued growth and opportunities in these sectors.

Estimating the import value of geospatial technology from India to Saudi Arabia involves considering the range and scope of ongoing projects. Indian firms like Genesys International and IIC Technologies have secured significant contracts for major projects, including urban development and digital twin initiatives. Given the size of these contracts and the



(Source: GW Consulting Analysis)

growth in Saudi Arabia's geospatial analytics market, it is reasonable to estimate that the annual import value is in the range of USD 50-100 million. This aligns with the increasing investment in geospatial technologies for urban planning, infrastructure development, and smart city projects within the Kingdom.

India Saudi Arabia Bilateral Space Partnerships

Saudi Arabia has been investing heavily in its space sector, and the Kingdom is planning to invest around \$2.1 billion into its space programme as part of its 'Vision 2030 Reform' agenda. The country also recently launched its first domestic communication satellite, namely [SGS-1](#), and has also undertaken several other programmes, such as the [Ajyal Space Programme](#), catered towards creating a knowledge-based economy, particularly in the science and technology sector, and the [Orbital Sites Reservation Project](#) through which the Saudi Space Commission aims to eliminate the country's dependence on foreign orbital slots and minimizing expenditure foreign satellite operators.

With countless other upcoming projects lined up, India's bilateral agreement (MoU) signed between [ISRO and KACST](#) (King Abdulaziz City for Science and Technology of the Kingdom of Saudi Arabia) in 2010 regarding cooperation in the field of Space for peaceful purposes has become especially attractive. Through this agreement, India and Saudi Arabia have agreed to cooperate in several fields, such as [Remote sensing, Space meteorology, Disaster Management](#), Satellite communication and navigation, exploration of Space, building capabilities in space technology, implementation of joint programmes and undertaking projects that serve mutual benefits, training and exchange of personnel and scientists, [joint research programmes](#), conferences, symposia, exhibitions etc. As of 2021, India and Saudi Arabia have re-initiated their discussion on space cooperation and a Space Pact after years of lackluster relations between the two on the space front, with cooperation only limited to remote sensing and satellite navigation systems.

About Geospatial World Chamber of Commerce (GWCC)

Geospatial World Chamber of Commerce (GWCC) – a non-profit body, headquartered in India, has been established by Geospatial World to promote trade and commerce globally, and with special attention to facilitating growth of trade and commerce of Indian geospatial industry with primary partner countries of India in the context of evolving geo-political world order.

GWCC strives to facilitate dialogues on open trade and commerce advocating towards developing level playing fields and ease of doing business practices for commercial companies at global levels with primary partner countries of India in the context of evolving geo-political world order. We are as much committed to nurture and promote Indian industry growth in international market as we aim to facilitating participation of overseas companies in Indian market and enabling establishment of their businesses and supporting their engagement and partnership with Indian stakeholders.

Rationale

There is a pressing need to strengthen bilateral business forums that provide mechanisms to promote and strengthen trade and commerce in the field of geospatial and space technology between two countries. Geo-Political alliance and bilateral agreements does provide an excellent atmosphere wherein we could leverage friendly and cultural ties to grow trade and commerce significantly. As space infrastructure and geospatial services serve as the foundation of digital ecosystem, such an engaging collaboration may also help adding new dimensions to overall business relations in the field of Climate Change, Smart Cities, IT and Engineering industry.

In the last 2 years, GWCC did organise Bilateral Business Summits with USA, Japan, Australia, France and Sweden receiving quite an encouraging participation and response. In fact, such exercise is helping augment our young space and geospatial industry to understand trade and commerce opportunities as well as underlying role of government to facilitate and extend institutional framework to grow the bilateral business potential.

Roundtable meeting with MEA, India

In the last quarter of year 2023, GWCC organised a high-level meeting with Ministry of External Affairs, (MEA, India), which was attended by about 20 + Indian missions, and we have successfully advocated including geospatial and space industry as part of India's trade relations and especially its economic aid program as also include the same in emerging and critical technology initiatives of Government of India. Over the next few quarters, we shall be organizing trade missions to and from USA, France, Sweden, Holland, Germany Australia, Saudi Arabia, UAE, Japan, etc as well as develop white papers and resources. We do foresee a huge growth for space and geospatial industry and their interdependent nature makes it obvious to collaborate and showcase entire value chain.

Trade Mission & Bilateral Summits

As part of our mission, we organised the first ever Indian Space and Geospatial Industry Trade Mission to France and Sweden in Paris and Stockholm. The Trade Mission was widely supported and welcomed by our Government, Institutional, and Industry partners and stakeholders. Additionally, GWCC has organised bilateral summits for the USA, Japan, Sweden, and France, and as part of our mission, we have also arranged multiple bilateral summits with the USA, Japan, and Australia.






India Saudi Arabia Space and Geospatial Business Summit

In view of above laid out scenario and opportunities, Geospatial World Chamber of Commerce (GWCC) is organising the India-Saudi Arabia Geospatial and Space Business Summit on December 2, 2024 as part of GeoSmart India conference at Hyderabad International Convention Centre in Hyderabad, Telangana, India. The one day summit shall witness participation from the key stakeholders from government agencies, civil society, private sector, and academia and research fraternity from both the countries - Saudi and India. GWCC endeavours towards facilitating strategic dialogue between the two countries strengthening India-Saudi Geospatial and Space Business Partnership. GWCC further strives to build on the mandate of Governments to provide broader framework of cooperation and develop an enabling environment of ease of doing business in their respective countries. This would further boost confidence of commercial companies to co-invest and embark on long term pathways for sustainable and profitable partnerships.

Summit Objectives

- Create a platform for Indian and Saudi businesses to explore joint ventures, collaborations, and technology transfers in the space and geospatial sectors.
- Foster knowledge-sharing sessions and workshops to enhance technical capabilities and expertise between the two nations.
- Engage policymakers and regulatory authorities to streamline frameworks for easier collaboration and investment in space and geospatial industries.
















Who will attend?

 Industry Leaders	 Government Functionaries	 Thought Leaders
 Business Users	 Implementing Agencies	 Trade Organisations

Highlights of the Programme

Dialogue forums consisting of participation from Government, Industry and Civil Society leaders	Keynote addresses by renowned thought leaders and experts	High Level Networking Reception
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GWCC Programme Partners

 <p>Embassy of India France & Principality of Monaco</p>	 <p>Embassy of India Washington, D.C., USA</p>	 <p>Embassy of India Sweden & Latvia</p>	 <p>U.S.-India Business Council</p>
 <p>JETRO Japan External Trade Organization</p>	 <p>AGI ASSOCIATION OF GEOSPATIAL INDUSTRIES</p>	 <p>ELCINA 55 years of dedicated service</p>	 <p>Department of Science & Technology Government of India</p>
 <p>IN-SPACE</p>	 <p>DEPARTMENT OF STATE UNITED STATES OF AMERICA</p>	 <p>SIINDIA Satcom Industry Association</p>	 <p>Euroconsult</p>
 <p>SWEDEN - INDIA BUSINESS COUNCIL</p>	 <p>INDIAN SPACE ASSOCIATION ISpA</p>	 <p>IACC INDO-AMERICAN CHAMBER OF COMMERCE</p>	 <p>Australia India Chamber of Commerce</p>
 <p>U.S. Chamber of Commerce</p>	 <p>विदेश मंत्रालय MINISTRY OF EXTERNAL AFFAIRS</p>	 <p>BUSINESS SWEDEN</p>	 <p>GEOSPATIAL WORLD ADVANCING KNOWLEDGE FOR SUSTAINABILITY</p>

Visit Website



www.gwcc.in

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