

EXECUTIVE SUMMARY

This report gives an overview of business opportunities in the U.S. public sector market for geographical data services, tools, products, and information systems. The study focuses on the federal level, with some state and local government data, and covers:

- market size;
- market structure;
- direction of future needs;
- leading vendors;
- leading federal customers;
- how to identify opportunities;
- key contacts for partnerships and industry associations;
- upcoming events of interest; and
- sources of further market intelligence.

Most significant U.S. federal geomatics opportunities for geomatics services are imbedded in larger contracts for services like environmental restoration, construction or engineering. These projects require geographic information or services in order to be effectively carried out, but the geomatics requirements are most likely to be awarded as subcontracts. The market for explicit geomatics services -- for example, cartography, topography, or photogrammetry -- in the U.S. federal government is small. Both kinds of contracts are dominated by a few large firms. Many more contractors often scramble for less than 30 percent of the contract dollars.

The state and local government markets together are as large as the federal market -- over half a billion dollars annually. This report has excellent appendices with contacts knowledgeable about the geomatics requirements in each state.

Partnerships, particularly with American firms, are therefore essential to success. Strong participation in U.S. industry associations and frequent marketing research calls on individual project managers within the federal agencies are highly recommended.

**For further market information or custom reports, please fax your request to
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