

# EARSC

European Association  
of Remote Sensing  
Companies



## **The Future of GMES** **Brussels Space Policy Round Table**

Geoff Sawyer, Secretary General  
17<sup>th</sup> February 2012, Brussels



# What is EARSC?

- EARSC is a non-profit-making organisation created in 1989 as the voice of the European geo-information EO service industry
- Mission & objectives:
  - to foster the development of the European Geo-Information Service Industry
  - to stimulate a sustainable market for Geo-information services using EO data, openly accessible to all members
- Today EARSC has 70 members in more than 22 countries, and is a recognized association worldwide
- Represents European geo-information providers creating a sustainable network between industry, decision makers and users



# European EO Services Industry

- Offers a full range of services based on extensive experience serving government, industry and the citizen
- Includes data providers, downstream service providers, software and consultancy companies with a mastery of space-borne/airborne/in-situ systems and sensors technologies.
- Innovative / dynamic; many new companies, changing ownership
- Between 100 and 200 companies largely SME's with strong partnership experience across European borders.
  - Estimated as €800m to €1b annual revenues.
  - Highly skilled workforce; interchange with other sectors
  - Last survey in 2006 identified 152 organisations.
  - Full industry survey will be made by EARSC during 2012.



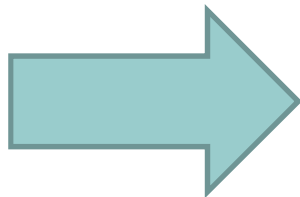
# Importance of GMES

- Raise awareness amongst policy makers of the value of space-based observations.
- EO Services industry can bring maximum economic benefit to Europe from the GMES programme by exploiting GMES Core services into new areas:
  - opportunities using GMES products & services in commercial sectors
  - Export of GMES products & services
  - Develop efficient and innovative downstream products & services for EU public customers (and others).
- EO Services Industry has a strong interest in the way GMES will be implemented.



# GMES: Key Issues for EARSC.

- Key Issues for EARSC and the industry:
  - Clarity in the market for GMES products and services; how will they be procured? Where will budgets be placed?
  - Clearly defined and understood responsibilities in the public and private sectors.
  - Clear data Policy respecting public and private commitments.



## Position Papers:

- Exploiting GMES Operational Services, March 2011
- The Threat to GMES; July 2011
- GMES Data and Information Policy; October 2011





# EARSC and GMES Data Policy

- Raw data from Sentinels should be free and open.
- Data from commercial satellite operators should be procured under appropriate license conditions.
- Core services to be freely and unconditionally available to all users and downstream partners.
- Downstream services should be procured commercially on a fair and competitive basis.
- A registration system for GMES users should be put in place to ensure:
  - basic quality conditions are met
  - licensing conditions are respected
  - fair competition on the international market.



# Free and Open Data Policy

- GMES is a public programme with the goal to supply public decision makers with critical information.
- Growing trend towards treating public data and information as a public good and move away from cost recovery models adopted by many agencies.
  - Met Offices (eg UK)
  - Mapping Agencies (eg Netherlands)
  - Business Registers
  - GI data with local and national bodies (eg Spain)
- EC studying to have new legislation following 2003 directive on re-use of public sector information
  - POPSIS report provides evidence
  - Directly relevant for GMES



# Landsat Data Policy

- Experience of Landsat in the US is directly relevant
- Since 2008, US government opened Landsat data archive for public / commercial re-use.
  - Daily scenes downloaded went from 53 per day (sales in 2001) to 5776 per day.
  - Over 7 million scenes downloaded to date
- Conclude that:
  - Societal value exceeds the cost of the satellite
  - Provides \$100m's of economic value to the US
  - Commercial enterprises thrive on the availability of free images.
- More research is needed into the economic benefits of a free and open data policy





# European Policy on PSI Re-use

- Existing EU legislation (2003) encourages PSB's to make data available at marginal cost.
  - However, it is not mandatory and allows them to use cost recovery models including profit
- Recently growing momentum behind open data (OGC etc) and EC will review the situation in 2012 – possible new legislation in 2013.
- POPSIS study in 2011 provides good evidence to support the case to lower charges and improve accessibility,
  - Low revenues from data subject to cost-recovery models
  - Strong growth in mobile market (Apps)
- Reduced entry barriers leads to
  - Very high take-up of data where marginal cost policy is introduced
  - Strong innovation where data is available



# Effects of Lowered Charges

- In those cases where PSBs moved to marginal and zero cost charging or cost-recovery that is limited to re-use facilitation costs only, the **number of re-users increased by between 1,000% and 10,000%**.

Case study	Increase
BEV	Number of datasets sold: 200% - 7,000% increase
DECA	Number of re-users: 10,000% increase Turnover re-users: 1,000% increase
Destatis	Number of unique visitors: 1,800% increase Number of downloads: 800% increase
IGN-CNIG	Volume of data services: 200% increase Number of users: 200% increase
KNMI	Number of re-users: 1,000% increase Turnover re-users: 400% increase
Met.no	Number of re-users: 3,000% increase Turnover re-users: more than 200% increase
Spanish Cadastre	Number of downloads: from 800% to 1,900% increase for various datasets.

- Lowering charges may **attract new types of re-users, in particular SMEs**.
  - This also applies to cases where the price cuts have been less significant (or even absent), but where **special pricing schemes for SMEs** were introduced.

Courtsey Deloitte: Taken from Popsis Report: presentation to the PSI Group Meeting; September 2011



# GMES Data Policy Recommendations

- An industrial viewpoint to decision making.
  - EG. a GMES Services Supplier Group alongside the GMES User Group so as to provide a platform for exchange.
- A comprehensive governance arrangement for GMES.
  - an interim governance structure is suggested to be put in place in 2012 with a permanent structure to follow.
- A budget for GMES within the MFF
  - including sufficient funding to ensure the development and supply of the GMES products.
  - Funds to support future research needs into new and innovative products and services.
- A registration scheme for GMES data and products



# Developing the Downstream Sector

Recent Reports from Booz and Co and ESPI have highlighted the need for policy makers to give more support to the downstream sector:

- ESPI
  - Enhance financial instruments stimulating the development of innovative downstream Applications
  - Increase development of user applications and services.
  - Ensure data harmonisation and standardisation.
- Booz
  - A key part of realising the potential of the industrial policy goals of GMES is to facilitate the development of a commercial downstream sector of service providers and applications using data supplied through GMES
  - a commercial strategy should be developed for downstream sector development.



The European Service Industry offers strong assets to support GMES services