

EARSC Position Paper

on

the Copernicus Regulation

EARSC represents the Earth Observation geo-information services companies in Europe. Today EARSC has 65 members coming from more than 20 countries in Europe and including nearly 50% of the total number of European EO service companies. Over 60% of these are small or medium sized enterprises. Our members include both commercial operators of EO satellites and downstream, value-adding companies. The sector plays a key role in providing value-added geo-spatial information to its customers in Europe and the world. In 2012, the revenue of the European EO services sector is estimated to be around €750m and giving work to over 5000 highly skilled employees. The industry is growing at over 10% per annum.

The European EO Services industry has a strong interest in the development and implementation of the Copernicus programme. The companies comprising the mid-stream (satellite operators) and downstream (value adding) sectors referenced in the Copernicus Regulation are anticipating a strong impact on both sectors as a result of Copernicus becoming an operational programme.

Therefore we welcome the EC proposed regulation and look forward to it entering into force. However, we do believe that there are a few areas which should be modified to allow the full engagement of the entire EO services industry:

1. Stable Investment Environment

For both sectors to invest in bringing new products and services to the benefit of Copernicus, the boundaries between public and private sector activities need to be more clearly defined and understood so as to ensure a stable environment against which future investment decisions can be taken.

2. Industrial Policy

Industry will be a core actor in the Copernicus programme both in delivering data and services to the public sector and by exploiting the data and services into new global markets. This shall include the deployment of private investment and other resources in support of the programme. An industrial policy is needed alongside the Copernicus programme based on 3 elements:

- a) A procurement policy based on value for money. The procurement of Copernicus products and services should be driven by quality and not purely by cost also recognising the importance of local data.
- b) A full industry role in the provision of services. “Operators” should be European level organisations with a clearly defined role as budget managers and the specific objectives to (i) involve the private sector to the maximum extent possible and (ii) to organise services provision following an efficient balance between centralised and decentralised approaches.
- c) An “exploitation plan” based on co-ordinated R&D (using H2020 and other resources) and support to SME’s right through to market development.

3. Long Term Datasets (Contributing Missions)

A plan should be produced showing how data from contributing missions shall be procured covering long-term datasets of all data and resolution types as well as ad-hoc very high resolution data to ensure that the data can be supplied and that private sector resources can be adequately deployed.

4. Data and Information Policy

Regarding the Copernicus data and information policy; industry supports the proposal that data from Copernicus satellites will be free and open within all contributing nations and largely supports this policy for 3rd party access along the lines of the data sharing principles promoted by the Group on Earth Observation (GEO). Value-adding companies in Europe anticipate that this policy will encourage global use of European technology as well as stimulating other countries to make their local satellite and in-situ datasets available enabling European companies to develop export business.

However, European companies which are currently operating and selling data from satellites are concerned that making Sentinel data freely available might adversely impact their business model. Thus, to assess the impact on the value chain and in order to promote private investment, we propose that a review of the adopted data and information policy shall be conducted for its economic impact within 2 years of the adoption of the Copernicus regulation with the objective to take action regarding access by 3rd parties should this prove negative.

5. Governance

An active industrial representation within the Copernicus Governance Model is necessary to ensure effective partnership backing the decisions taken by the public authorities.

EARSC promotes these ideas and goals with a view to meeting the objective of the regulation to *strengthen Earth observation markets in Europe, in particular the downstream sector, with a view to enabling growth and job creation*. In consequence we propose specific adjustments to the Copernicus Regulation and ask the European decision authorities to incorporate the appropriate modifications.