

# EARSC



European Association  
of Remote Sensing  
Companies

## **GEOSS: A Perspective from the European EO Services Industry.**

**Geoff Sawyer: EARSC Secretary General**



# Background

## Geospatial Industry Forging Ties with GEOSS: A Value Proposition

GEO was formed in 2003-2005 as a body to co-ordinate public sector activities in EO through a GEOSS.

In 2005, EARSC and AAEO proposed to open a dialogue between GEO and the private sector but it was too early.

Consequently:

EARSC now welcomes the new efforts from GEO to engage with the private sector and most especially the EO services sector:

- positive for all stakeholders (public and private)
- points for discussion / questions to be resolved



## What is EARSC?



EARSC is a trade association (NPO), founded in 1989, which represents companies: offering and undertaking consulting and other services or supplying equipment in the field of remote sensing.

Our mission is

- to foster the development of the European Geo-Information Service Industry

We represent European geo-information providers creating a sustainable network between industry, decision makers and users

Our focus is on remote sensing from space-based platforms (satellites) but we also have members which are aircraft operators.

Today we have 74 members from 23 countries in the EU and beyond.

# EO Services Industry Sector Profile

## Key Facts

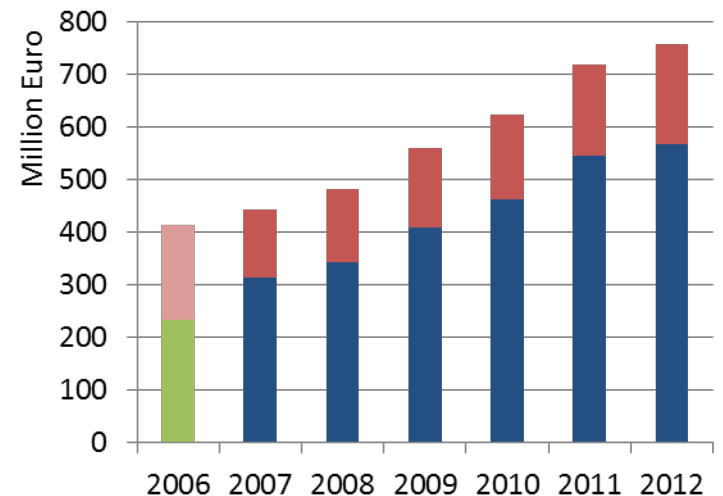
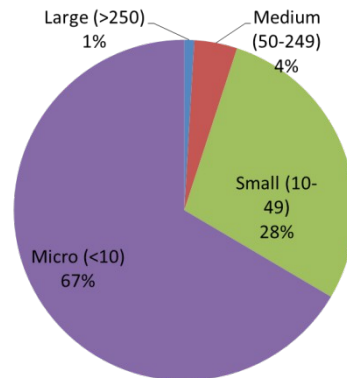
### From EARSC 2013 Industry Survey

319 = Number of companies in Europe and Canada in 2012

5087 = Total number of employees in 2012

€757m = Total Revenues for the sector in 2012

67% = Proportion of companies with less than 10 EO employees:  
95% with less than 50 employees





## What does EARSC do?



- Provide information to our members on programmes, policy and the sector; (business intelligence)
- Maintain a knowledge of the industry ie statistics, market information etc.
- Promote professional standards within the industry
- Promote the industry and it's capabilities by:
  - Creating links between EO services sector and other business sectors eg oil & gas, insurance as well as public institutions e.g world bank
  - Organising events offering networking opportunities as well as focused information
  - Advocacy towards policy makers on issues of concern

Focus is on enabling the development of new business

# Linking Communities - OGEO



Login

## EARSC Portal

- Provides the links to other communities : public and private
- Offers a forum for exchanging information
- Guidance on EO applications
- Success Stories eg real benefits from EO.
- Industry status eg certification & standards
- Knowledge management e.g documents, meetings etc



**OGEO IS A FORUM FOR INFORMATION EXCHANGE BETWEEN THE OIL AND GAS AND EARTH OBSERVATION / GEO-INFORMATION PROFESSIONAL COMMUNITIES.**

[MORE INFORMATION](#)

### FAST INFORMATION

The portal offers the advantage of rapid and direct information exchange across the range of activities relating to Earth Observation undertaken in both market sectors. It will allow users to post questions related to information that is being sought and provides links to existing information in both communities.

### BUILDING NETWORKS

Suppliers of Earth Observation derived geo-information can co-ordinate and exchange expertise as well as building networks and partnerships with members of the oil & gas industry. It will allow members to respond to demand requests and make commercial offers easier. Prior exchange will allow the oil and gas industry to select more targeted products.

### PROBLEM SOLVING

Using the OGEO portal allows O&G members to seek help and address business problems using Earth Observation. Users can find new suppliers, win new customers, share experiences and seek practical advice for all application where remote sensing and earth observation can offer a solution or offer a business improvement.

# Linking Communities – Research Corner

Provides virtual networking and meeting facilities to form R&D (H2020) teams:

- Chat & exchange with other users
- Library of relevant documents
- Advertise partners search
- Book a private meeting room for a project team
- Learn about programmes with guidance and analysis

The screenshot shows the EARSC Research Corner website. The header includes the EARSC logo (European Association of Remote Sensing Companies) and a navigation menu with links for Dashboard, Forums, Work Groups, Resources, Projects, News, and Help. A search bar is located in the top right corner. The main content area is divided into several sections:

- Contents:** A list of links for Research Corner Bulletin Board, Research Corner Classroom, Research Corner Library, Research Corner Lounge, and Research Corner Meeting Rooms.
- Recently Updated:** A list of recent updates, including EARSC Research Advert (updated Feb 19, 2014), Research Corner Library (updated Feb 11, 2014), and various PDF documents.
- Research Corner Home:** A central section with a welcome message and a list of icons for Chat in the Lounge, Read in the Library, Place & read ads on the bulletin wall, Meet in Private, and Learn in the Classroom.
- Blog Posts:** A section for blog posts, including "EARSC Guide to H2020" by administrator (Jan 08, 2014) and "Welcome!" by administrator (Dec 27, 2013).
- Recent space activity:** A section for recent space activity, featuring a profile picture of Monica Miguel-Lago and a link to EARSC Research Advert (updated Feb 19, 2014).
- Space contributors:** A section for space contributors, listing Monica Miguel-Lago (6 days ago), Geoff Sawyer (22 days ago), and administrator (20 days ago).



# Public-private overlaps

- EO is a domain where both public and private bodies are active throughout the value chain which leads to many areas of confusion as to who is playing what role.
- Public and private entities are both suppliers and users of data and geo-information.
- Issue is much wider than GEOSS, but tightly linked and became very clear with the discussion over FODP for Copernicus.
- GEO could have a role to help clarify the overlaps and improve efficiency in the whole system especially by
  - helping to create the conditions where private investments can be made and sustained so reducing the public sector burden.
  - ensuring that genuine public needs, especially in developing nations without their own EO capacity can benefit.





# GEO Proposed Targets 2015-2025

- *Coordinating Earth observations, seeking active collaboration with relevant existing and emerging global initiatives with complementary mandates to both promote full and open access to Earth observation data, and strengthen Earth observing networks, strategic planning and identification of the needs for applications and services.*
- *Facilitating enhanced access to national, regional and global Earth observation data and information through the implementation of a robust and user friendly GEOSS information system that links available systems, also taking advantage of repositories of "big data";*
- *Fostering global initiatives that address identified gaps for Earth observation information including where appropriate the facilitation of the development of associated services and arranging for their subsequent uptake by relevant entities.*



# GEO Role (1)

## Enable improved data access to all stakeholders

- GEO stakeholders are looking to maximise the benefit of the investments which they have made. As indeed are private sector actors.
- GEO can:
  - promote an appropriate (free and open) data sharing policy for publically owned satellite systems
  - ensure there is a level playing-field between international data providers
  - identify gaps in data supply and encourage these to be filled by private or public sector investments
  - ensure that all existing and planned capabilities are factored into decision taking.



## GEO Role (2)

### Raise awareness of EO capabilities:

- GEO has a role to promote the capabilities of its stakeholders in the public sector to maximise the use of the data and services.
- But data and services are provided from both public and private sources:
- GEO can:
  - promote the data and information products available from both public and private actors.
  - co-operate with the EO services private-sector to ensure that commercial interests are developed and maintained



## GEO Role (3)

### Understand the needs of the public sector:

- GEO stakeholders comprise both demand side and supply side nations
- Especially for those on the demand side without their own capabilities
- GEO can:
  - maintain a dialogue with the public actors to understand better their geo-information needs
  - Interpret these needs into existing and future systems capabilities and identify gaps
  - Work with both public and private actors to foster the necessary investment to meet these needs.



# Conclusions

- GEO can play an important role in optimising the “system” for developing and delivering EO geo-information services for public benefit.
- Industry has a key role based on past investments and future opportunities and should be the main motor for implementing infrastructure and services.
- GEO engagement with the private-sector should focus on the EO services companies to help clarify interfaces and resolve overlaps
- Umbrella organisations like EARSC are necessary to help reach the large number of SME’s which constitute the sector.
- Together, develop framework for private and public organisations to work together.



# Questions

- How can GEO best help the development of the EO services sector?
  - Common understanding of what is meant by private sector.
- What exactly should be the role of GEO in developing GEOSS?
  - Enable, facilitate the development of?
- How can the private sector best be associated to the development of GEOSS?
  - associated, committed?
- How can we ensure the maximum opportunity for investments to come from the private sector towards meeting the (public) goals of GEOSS?
  - public sector goals?
- What are the goals for GEOSS beyond bringing together the existing efforts of MS?



# Copernicus – Key market enabler

Copernicus is a key European public programme to provide information on environment and security to European policy makers and citizens.

Direct funding for EO services is important and will develop new products to be exploited

But more important:

Copernicus provides a strong opportunity as a market driver for EO Services.

- Industry can exploit opportunities using Copernicus products & services in other markets eg. commercial, export and non-EU government.
- with an EU customer base to provide a reference.

In 2014, the first of the Copernicus Sentinel satellites will be launched generating Terrabytes of data every day.

It can be a source of golden eggs creating new tax revenues and jobs.

