

# EARSC

European Association  
of Remote Sensing  
Companies



## EO Services Industry

Geoff Sawyer: EARSC Secretary General



LET'S EMBRACE SPACE / 15 - 17 September 2014 - Rome, Italy

EARSC is a trade association (NGO), founded in 1989, which represents companies: offering services (including consulting), supplying equipment in the field of remote sensing or using EO data.

- to foster the development of the European Geo-Information Service Industry
- Today, 75 members (65 full members / 10 observers) from 23 countries

R&D: Provide views to institutional stakeholders on industry needs  
Perception that EO services view is missing from previous consultations

- Excellent base of R&D in Europe through FP and ESA
- There remains a gap before this is commercialised

??? How to help companies develop their business based on EU R&D investment??





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# THE EARSC NEWS

[www.earsc.org](http://www.earsc.org) The Industry's Favourite Network

News from EARSC on global developments in the  
EO Services Industry

The (Rapidly) Changing Global Environment.



**EARSC**



European  
Commission

# THE EARSC NEWS

[www.earsc.org](http://www.earsc.org)

The Industry's Favourite Network

August 2014

**WorldView3  
launched: 30cm  
imaging capability  
& Worldview 4  
(25cm & 29 spectral  
channels) delivered  
& ready.**

**Next generation  
Cosmo-Skymed  
announced for  
2017/18 launch**





# European Context

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Copernicus: Strong EU investment in new capabilities, Sentinel satellites and Copernicus Services:

? How to enable the private sector to commercialise?

H2020: Setting industrial priorities (see later slides)

ESA: Focus is on manufacturing segment : need to also work on applications of EU satellites and technologies through the downstream sector.

GEO: Provides only international political platform for exchange dedicated to EO.

Engagement with the private sector : but what does this mean?  
Need a dialogue with the EO services sector as a priority.

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Member States





# EO Services Industry Sector Profile

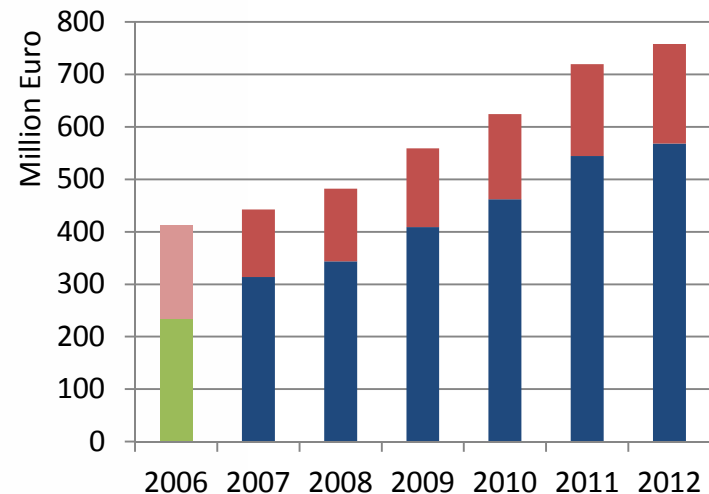
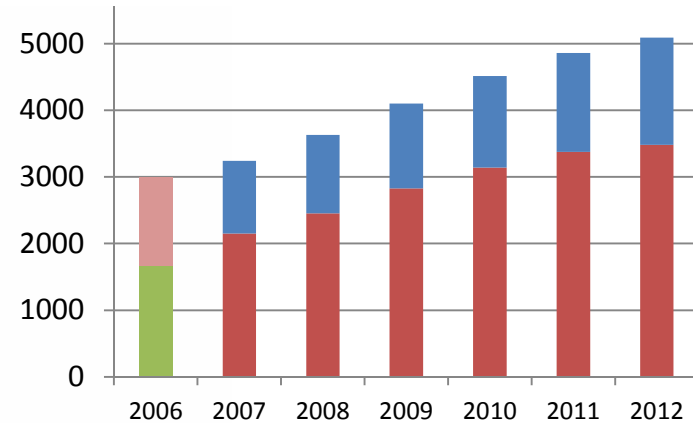
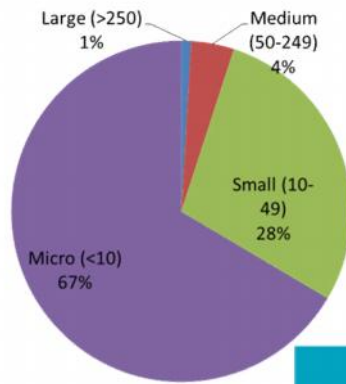
## Key Facts From EARSC 2013 Industry Survey

319 = Number of companies in Europe and Canada in 2012

5087 = Total number of employees in 2012

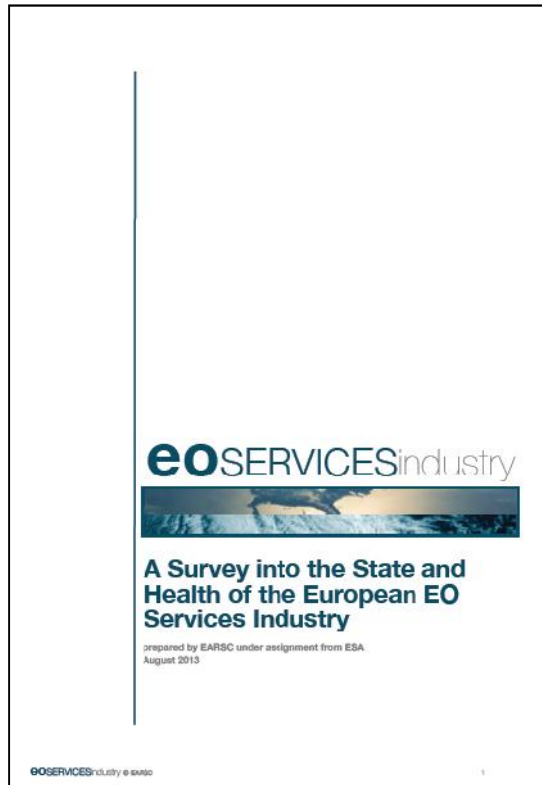
€757m = Total Revenues for the sector in 2012

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





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- Last survey based on our database of 365 companies throughout EU and Canada.
- New survey will start in October to provide update on the state and health of the industry; database holds over 500 companies in Europe.
- Extend coverage to include all sector employment in Europe and the projected use of Copernicus data and information
- Include international figures linked to Copernicus.
- Survey results expected in June 2015.
- In future, plan an annual update with limited but key data.

Support requested from all companies and national contact points to ensure coverage is as full as possible.





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## R&D Priorities – Linked to Copernicus

- Thematic research for 6 Copernicus services improve products, quality, accuracy
- Improve procurement process; product standards and certification
- New architectures ; improve quality and processing chain efficiency
- Integration of different data sources
- Understanding user requirements ; translation!







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## R&D Priorities – Market enabling

- Raising awareness of the capabilities of EO services and products related to the customers own processes.
- Innovative distribution and dissemination techniques to public and private customers linked to innovative payment and production systems and architectures.
- Risk reduction and means to underpin new business models of LowCapEx models,
- Product specification and standardisation / certification processes.
- Means to develop and enter new markets with customers outside of the EU ie exports.





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## R&D Priorities – Technology Development

- Integration of data from multiple sources eg. satellite, aircraft, UAV, balloon, ship, sub-sea, crowd etc.
- Means to access data sources with intelligent front-ends integrated with processing chains.
- Deep knowledge of scenes and metadata to permit and enable automatic imagery selection and extraction.
- Market oriented platforms which allow users to quickly acquire the information which they seek which will also allow suppliers and new route to market.
- Find ways to encourage new private initiatives based on private investment. Use of prizes and progressive funding approaches.





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## Recent & Current EARSC Actions

- Encourage Research proposals through networks:
  - Network event for EO Services in Brussels 25<sup>th</sup> September
  - Research corner : virtual networking @ **www.earsc-portal.eu**
  - Open to all potential research partners (academia, research institutions, industry)
- Promotion of industry capabilities:
  - eoPages : brokerage site @ **www.eopages.eu**
  - eowiki : wiki on eo applications and other resources @ **www.earsc-portal.eu**





European Commission

- Research Corner
- Information on calls
- Bulletin Board
- Meeting Rooms
- Exchange

Research Corner Home

**EARSC**  
European Commission  
Research Corner

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Dashboard Forums Work Groups Resources Projects News Help


**Contents**

Research Corner

- Research Corner Bulletin Board
- Research Corner Classroom
- Research Corner Library
- Research Corner Lounge
- Research Corner Meeting Rooms

**Research Corner Home**  
updated by administrator (20 Dec)

Welcome to the EARSC Research Coffee Bar (or cocktail bar if you prefer to meet in the evening). Here you can find everything you need - information, partners, ideas - for developing your research project proposal. Find documents in the library, post announcements on the message wall, chat to other people in the lounge, learn in the classroom and when you are ready to develop your proposal further you can book a meeting room where you can discuss in more detail away from everyone else. Look out also for announcements from the coffee bar manager from his soapbox.



**Blog Posts**

EARSC Guide to H2020  
administrator  
Jan 08, 2014  
Research Corner

Welcome! administrator  
Dec 27, 2013  
Research Corner

Chat in the lounge    Read in the library    Place & read ads on the bulletin wall    Meet in Events    Learn in the Classroom


**Recently Updated**

- EARSC Research Advert updated Feb 19, 2014
- Research Corner Library updated Feb 11, 2014
- 00\_01\_1587767-06\_jeh-5\_intro\_wa\_2014-2015\_en.pdf attached Feb 11, 2014
- 00\_01\_1587768-06\_jc\_wa\_2014-2015 attached Feb 11, 2014
- H2020 SC Societies created Feb 03, 2014
- Research Corner Bulletin Board updated Jan 27, 2014

Show More

Our goal is to make it easier for EO services companies to find partners and to construct winning proposals. The EC has also put various guides and tools to aid potential participants to H2020. Amongst these is an on-line guide which covers all of the steps to submit a proposal.

**Recent space activity**

 Monica Miguel-Lago  
EARSC Research Advert updated Feb 19, 2014

**Space contributors**

- Monica Miguel-Lago (6 days ago)
- Geoff Sawyer (22 days ago)
- Administrator (20 days ago)





## About the EO Wiki:

This is the home of the EARSC EO WIKI space. It provides a great resource for understanding EO applications in all their variants structured according to the EARSC Taxonomy which identifies a full range of products coming from EO services and describes their application. For a full description of the EO Wiki go to the specific help page.

### EO SERVICES IN EARSC TAXONOMY

EO applications and services are described using the EARSC Taxonomy to organise them by thematic area and by market sector to which they apply.



### EO INDUSTRY INFORMATION

Find information on the companies supplying EO Services and some of their successes



### EO ACTIVITIES

Find information on some of the major research and development projects in Europe as well as on new technologies being introduced to the sector.



### EO PARTICIPATION & QUESTIONS

Find partners and information to participate to R&D activities and ask questions of experts in the field.



## ★ My Favorite pages

Displaying pages recently added to your favourites list.

- [eo4all Portal \(eo4all Portal\)](#) ★
- [Geoff's Blog \(Geoffs Blog\)](#) ★
- [Home \(OGEO\)](#) ★
- [eovox3 task 11 evaluate impact of previous initiatives \(EARSC Wiki\)](#) ★
- [Technology Watch \(EO Wiki\)](#) ★

## 💬 Discussions



EARSC position paper on Copernicus Service Procurement  
Updated on 04 Sep by Monica Miguel-Lago



Welcome to the EO Forum  
Updated on 12 Aug by administrator

## EO News

Sentinel-1 update  
Monica Miguel-Lago  
EO Wiki Sep 11, 2014

RapidScat to unveil hidden cycles of sea winds  
Monica Miguel-Lago  
EO Wiki Jul 09 2014





European Commission

# eo PAGES

## A MARKETPLACE BETWEEN EARTH OBSERVATION INDUSTRY & USERS

<b>224</b> COMPANIES	<b>27</b> COUNTRIES	<b>358</b> SERVICES	<b>221</b> BUSINESS QUERYS
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**EOpages** is a marketplace between the Earth Observation Service Industry & Users. EOpages shows the capabilities of the geo-information industry in general and value-adding companies in particular. The objective of **EOpages** is to help potential customers explore the available value-added geo-information services of interest to them in a new and user-friendly way.

[More info about the project >](#)

<b>Search &amp; Find</b>	<b>Address Book</b>	<b>EOMarket</b>	<b>Success Stories</b>	<b>News</b>	<b>About</b>
Search & Find is an easy, three-step process, guided search to access our exhaustive information repository on the EO industry.	Address Book contains the latest contact information of the EO industry. The online Address Book is easy to use, simply selecting and choosing the relevant categories or tags.	EOMarket is a customise section where Users contact directly Industry looking for product's technical characteristics, applications, availability, resources, etc...	Some examples of recent success stories resulting from EO industry development activities.	The news section aims to provide a quick access to the top stories. We provide information for stakeholders and users about the capabilities of the information value added services.	EOpages is a brokerage platform to help potential customers find suppliers whilst service providers will be able to promote their products.





## Recent & Current EARSC Actions (contd)

- Develop and deepen Community links with O&G industry and IFI's
  - OGEO workshop on 19<sup>th</sup> November in London
  - OGEO Portal and support to eo4og projects (ESA)
  - OGEOZine : quarterly magazine for OGEO network
- Develop tools to support the industry in export markets
  - Export workshop held in June
  - Developing export centre with information on resources available to industry
  - Exploring export mission possibilities
- EARSC Certification Scheme;
  - Trial of Management certification (ISO9001) based on 1<sup>st</sup> workshop in April 2013
  - Workshop in London on 19<sup>th</sup> November
  - Recognised suppliers and product specifications for information products





# R&D Priorities Summary

- Global environment is changing rapidly and EU effort is needed to maintain leading capability.
- Stronger industrial involvement in decisions and concerted R&D effort to help industry and especially SME's bring new ideas to the market:
  - Build upon investments made in Copernicus
  - Deliver improved products and services to EU public sector customers
  - Build export capabilities
- Sustained investment: EC and ESA can both play complementary roles
  - sustained investment through the “Valley of Death” up to demonstrable products with a confirmed customer base
  - Progressive but flexible funding (more use of prizes?)
  - Industry-led R&D with commitment for later stage research.
- Develop partnership through a European Research Roadmap for EO Services.







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For Information on EARSC:

[www.earsc.eu](http://www.earsc.eu) / [www.eomag.eu](http://www.eomag.eu) / [secretariat@earsc.org](mailto:secretariat@earsc.org)

For information on the Industry:

[www.eopages.eu](http://www.eopages.eu)

[Report on the State and Health of the EO Services Industry](#)

For links to other Communities:

[www.earsc-portal.eu](http://www.earsc-portal.eu) : [www.ogeo-portal.eu](http://www.ogeo-portal.eu)

