

EARSC

European Association
of Remote Sensing
Companies

Growth by Copernicus

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What is EARSC?

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

Our mission is:

- to foster the development of the European Geo-Information Service Industry
- to 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 and RPAS operators.

Today we have 78 members from 22 countries in the EU and beyond.

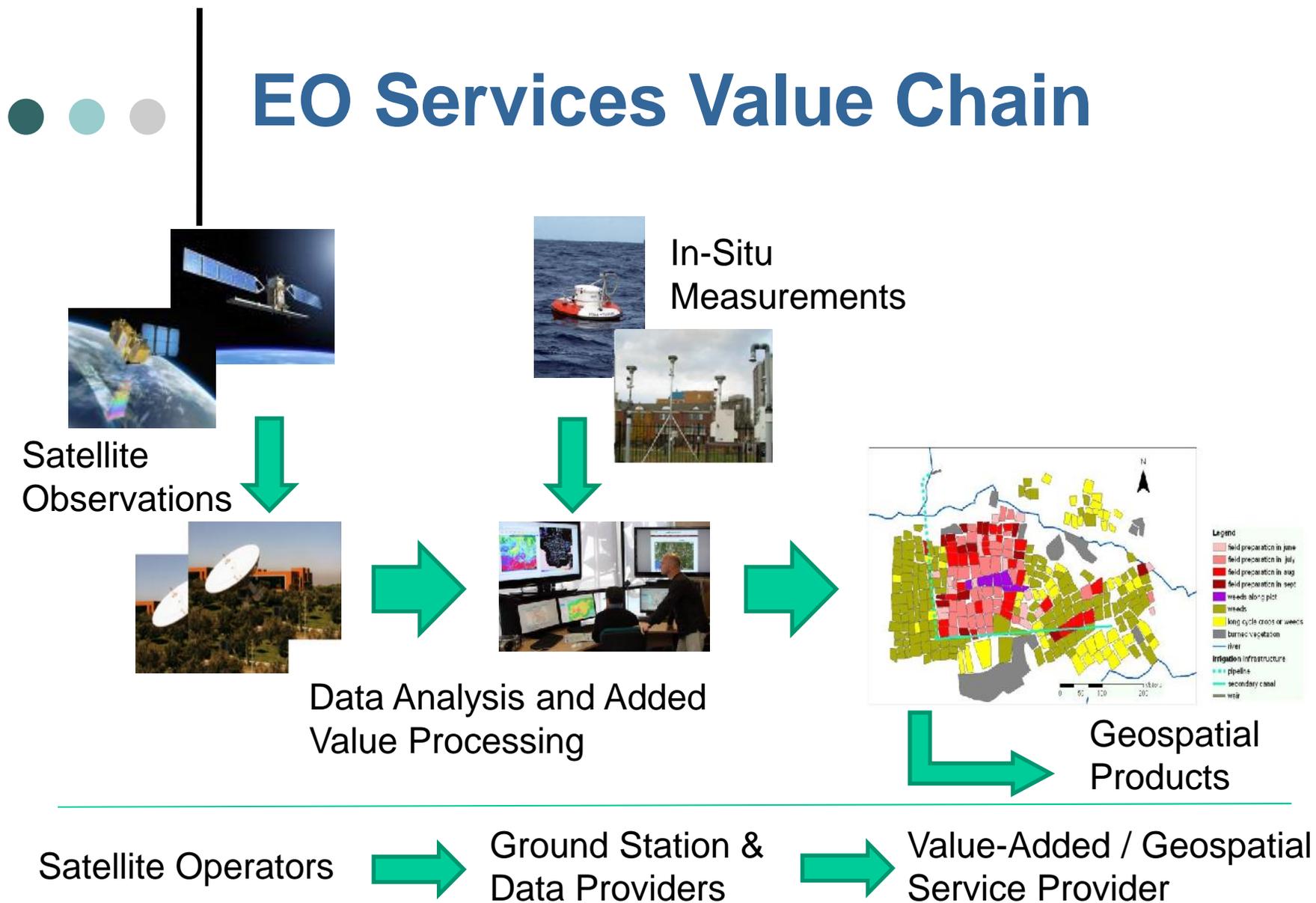


What does EARSC do?

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

EARSC focus is on enabling the development of new business

EO Services Value Chain





EO Services Industry Sector Profile

Key Facts From EARSC 2013 Industry Survey

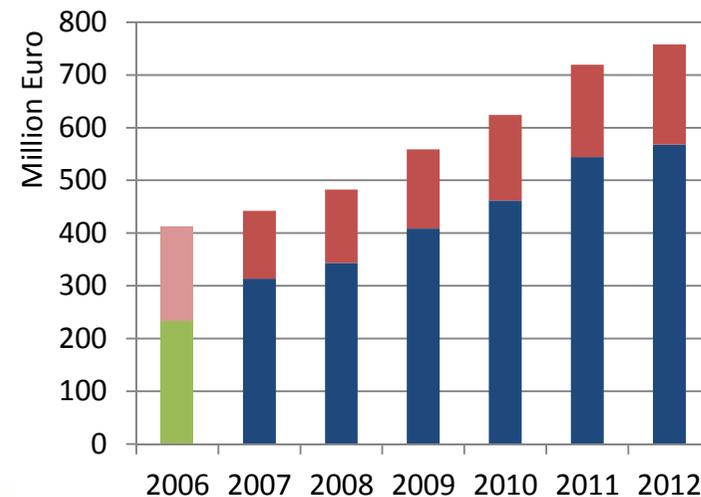
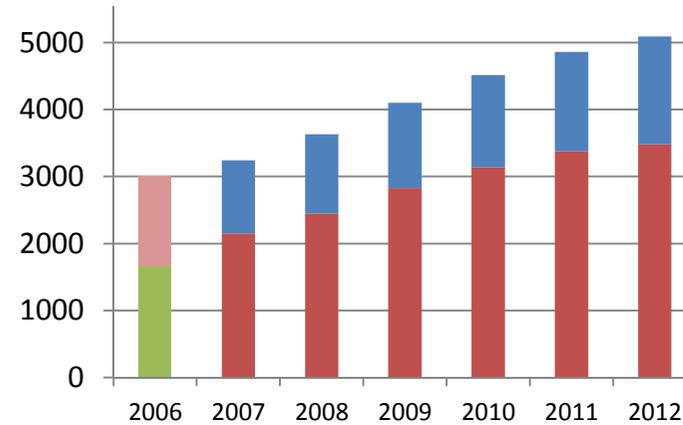
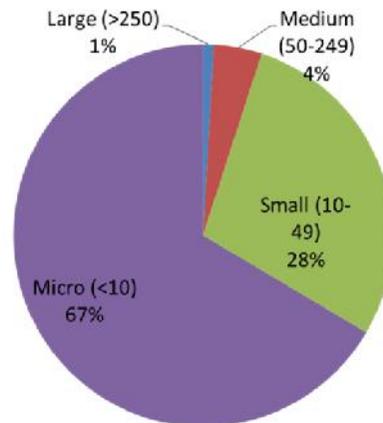
In 2012:

300 : Companies in Europe

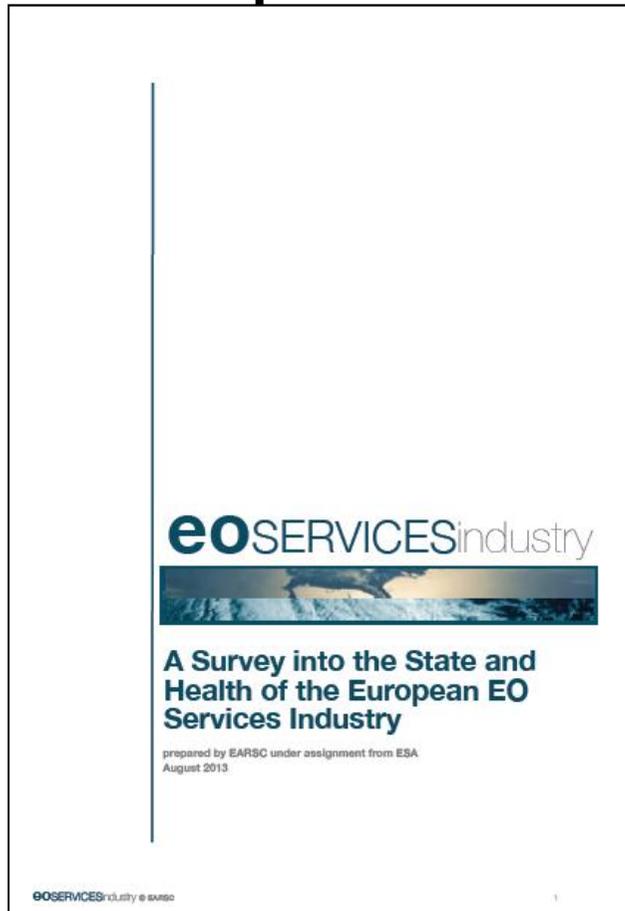
5087 : Direct employees

€757m : Total Revenues for the sector

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



European EO Services Industry



- Last survey based on our database of 365 companies across Europe and Canada.
- New survey started in October to provide update on the state and health of the industry; our database now 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, we plan an annual update with limited but key data.



Strategic Context

- Recently seen large shifts in the balance of power in the market:
 - DigitalGlobe has become the leading data supplier backed by new US legislation liberalising sales of high resolution imagery down to 25cm.
 - ESRI, PCI, Google, Microsoft provide the leading software and platforms for handling geospatial data.
 - Skybox (bought by Google), PlanetLabs and others are new players offering high resolution imagery through low cost business models.
 - Many other new players challenging, backed by government policy; for example China, India, Brazil, Japan.

A European effort is needed if we are to succeed in this market



Copernicus – a key market enabler

- Copernicus is a key European public programme (managed by DG GROW) to provide information on environment and security to European policy makers and citizens.
- Direct funding for EO services is important and will enable the development of new products to be exploited.
- But more important:
 - Copernicus provides a strong opportunity as market driver for EO-based services
 - Industry can exploit opportunities using Copernicus products & services in other markets e.g. commercial downstream, export to non-EU – with a proven-track EU customer base as a reference.
- In 2014, the first of the dedicated Copernicus Sentinel satellites (Sentinel-1) was launched, generating Terra-Bytes of data every day.

Studies predict that Copernicus will create 40,000 new jobs and €1.8bn revenues by 2030

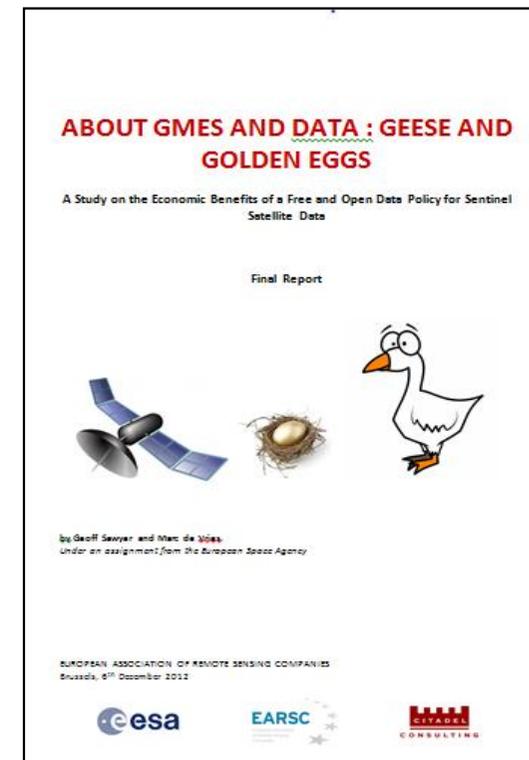
Starting from: A Free & Open Data Policy

Most effective way to develop the downstream market
(and generate pull on the upstream)

- Sentinel data is Public Sector Information (PSI), ie data collected by governments for its own purposes.
- PSI-reuse: since it is paid for once it should not be sold again by public agencies to develop revenues.
- It should be made available for free to support innovation and private sector development.

EARSC has supported and promoted the adoption of a free and open data policy for the Sentinel data

Measures are now needed to exploit this European asset and to grow the EU geospatial services sector



www.earsc.org



A Roadmap: for Commercial Exploitation

Copernicus is a great opportunity and must be grabbed with a strategic intent to place Europe as a leading supplier of products and services globally.

A roadmap should be developed as a partnership between industry and the public sector to improve the public-private interface focussed around:

1. Leveraging Investments in Copernicus
2. Research and Development actions
3. Market Structuring and Uptake of Services



1. Leverage Copernicus

Copernicus services can change the perception of EU public sector users on the use of EO geospatial services. Action is needed to:

- Promote the use of Copernicus to public users
- Ensure industrialisation of Copernicus services
- Clarify the boundary between public and private suppliers of geospatial information
- Develop international partnerships building upon the free and open data policy
- Provide easy access to the Copernicus data and information through a coherent, ground-segment strategy
- Adopt industry-led standards and quality measures.



2. Research and Development

Stronger industrial participation alongside public and academic partners is needed. Specific action is needed to:

- Increase the focus of research on geospatial data and services linked to user needs.
- Increase the budgets available to support new product development and service innovation
- Increase the private sector participation to European R&D projects
- Avoid duplication and multiplication of efforts



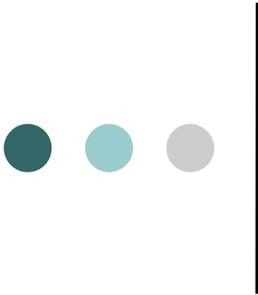
3. Market Structure and Uptake

The EO market is largely driven by the public sector covering 50% of the current market and which is often served by public bodies. Specific action is needed to:

- increase the market uptake and structure the market in Europe

Hence

- Introduce European “commercial remote sensing act”.
- Facilitate the emergence of new business models:
 - PPP’s, data buy, new business platforms
- Use of international policies to grow export markets
- Ensure international efforts such as UNCC, GEO etc are open to the private sector as suppliers.



Copernicus services - opening for business

EARSC is targeting industry participation with EEE's and thus short- and long-term actions for developing industrial capacity:

- Appropriate procurement approaches; harmonised where possible
- Consultation regarding new products and services
- R&D activities
- Industrial advisory role for service supervision
- Partnership for exploitation into new markets

Develop a roadmap for service evaluation, incl. need for capacity, R&D actions, etc.

EARSC focus on a roadmap for Copernicus Services Procurement



A dialogue between industry and policy makers

EARSC has long claimed a formal voice into the decision making process – interaction up to now has always been informal (through workshops, meetings etc).

Without an industry view, past and future actions are not adapted to be correctly industrialised to meet the needs of the market.

A dialogue needs to be organised under a recognised structure for the topic of geospatial services

Given the strong interest in space, this could be established in a “space” framework with the appropriate governance conditions.

EARSC supports to goal to establish a structured dialogue



For more Information

For Information on EARSC:

www.earsc.eu / www.eomag.eu / secretariat@earsc.org

For more information on the remote sensing industry:

www.eopages.eu

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

For links to other Communities:

www.ogeo-portal.eu