

European Association of Remote Sensing Companies



Geoff Sawyer, EARSC Secretary General



What is EARSC?

EARSC is a trade association (non-profit Belgian company), founded in 1989, which represents European companies: *providing services* (including consultancy) or supplying equipment in the field of remote sensing.

Our mission is:

- to foster the development of the European Geo-Information Service Industry
- to represent European geospatial-information providers, creating a sustainable network between industry, decision makers and users

Our focus is on the use of remote sensing from space-based platforms (satellites) and we have members from the full value-chain including aircraft and RPAS operators.



Network





BMT ARGOSS



BROCKMANN











BlackBridge



















67 full members, 9 observers From 22 countries in Europe











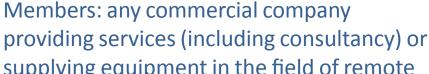


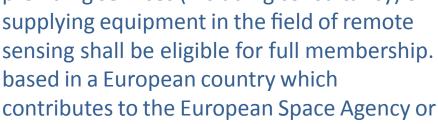












which is a member of the European Union

Observer: any organisation engaged in the

supply or use of Remote Sensing which does





















































































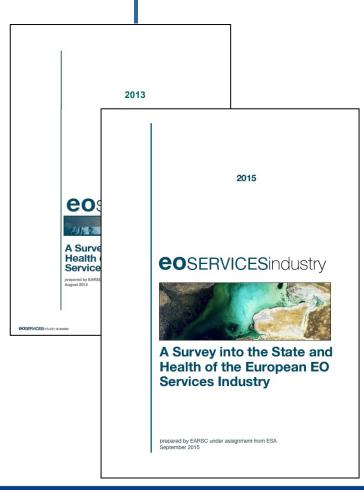
What does EARSC do?

- 1. Provide information to our members on programmes, policy and the sector; (business intelligence)
- 2. Maintain a knowledge of the industry, i.e. statistics, market information, etc.
- 3. Promote professional standards within the industry (certification)
- 4. 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
 - Awareness and media. e.g. eomag, OGEOZine, etc.

EARSC focus is on enabling the development of new business



EARSC EO Services Industry Survey



Second survey conducted by EARSC

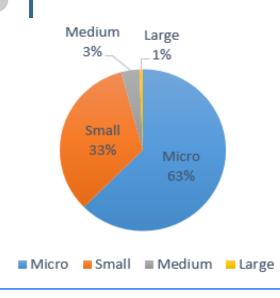
Provides a comprehensive view of the European EO Services Industry

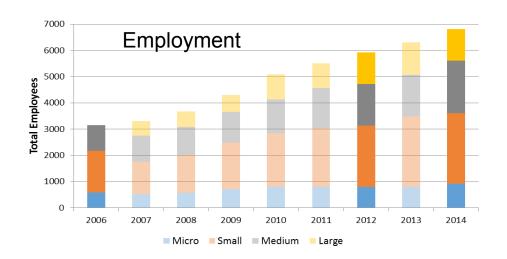
Covers the full range of EO service activities from satellite operators to value-adding and GI companies

Coverage of Europe and Canada



Industry profile

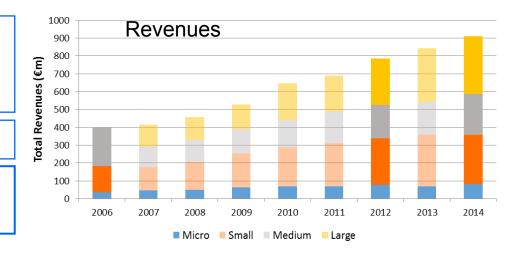




>450 companies in Europe 6811 direct employees €910m revenue

Growth rate >8% p.a.

63% companies < 10 EO employees: 96% companies < 50 employees

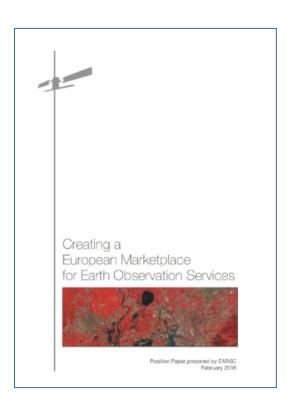




EARSC Position Paper (Feb 2016)

Our position paper sets out the numerous challenges facing the EO services sector today, such as:

- Fragmentation of European industry some 450 companies in Europe, most are Micro/SMEs
- Difficulty for these companies to access needed resources – data, processing, tools, know-how
- Entry of US IT giants to geospatial arena
- Access to finance, defining successful business models, attracting new customers
- Promotion of European EO services in export markets around the world
- Unclear boundary between public and private sector



Download: http://earsc.org/file_download/308/EARSC+PP+-+Creating+a+European+marketplace+for+EO+services.pdf



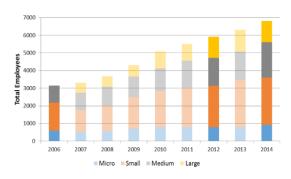
Europe has the capability

- we are just not working as one

World-leading programme



An industry growing @ 8-10% p.a.



National Imaging Capabilities



Excellent Science & Technology base





We need all stakeholders to work together, to maximise value from Copernicus Industry – Research Community – ESA – EC – Member States



• • What is EARSC's Vision?

A European Marketplace for EO services, with:

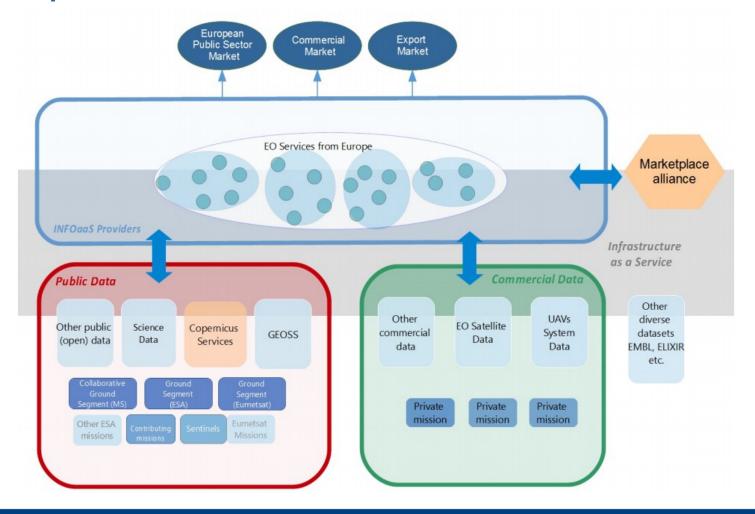
- A common identity where buyers can find European EO services, data and products of all kinds;
- Appropriate technical, legal, organisational and operational structures in place for the Marketplace to function;
- Operational platforms that link Copernicus and other geospatial data sources (public and private) on which to build EO Services;
- An environment whereby private initiatives can flourish.

Our aim is to help overcome the fragmentation in the European industry, and enable companies to develop their business in a global market

To facilitate this, we propose to establish a European *Marketplace Alliance for EO Services (MAEOS)*

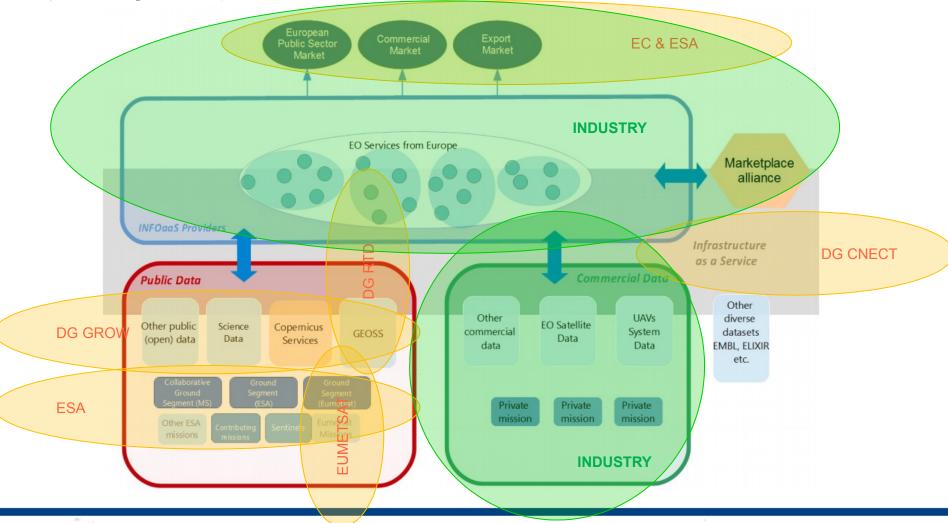


EARSC Vision: European Marketplace





Working together

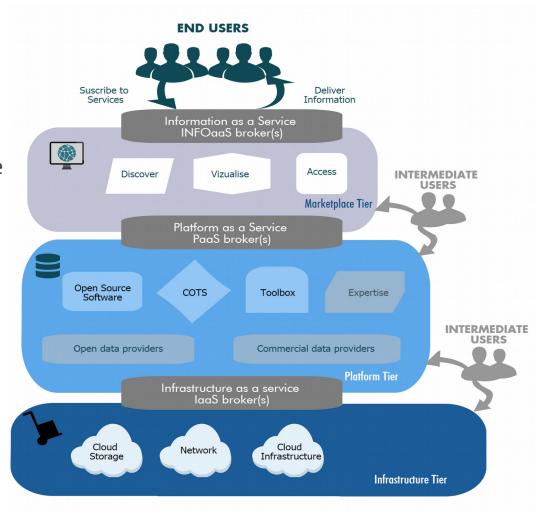




Architecture

Still to be refined, but we envisage:

- A layered architecture, where industry participants can contribute and compete in each layer
- Enable access to data, infrastructure, tools, expertise – both public/open and commercial
- Secure environment that protects intellectual property and commercial licences
- Collaborative environment that encourages competition and innovation





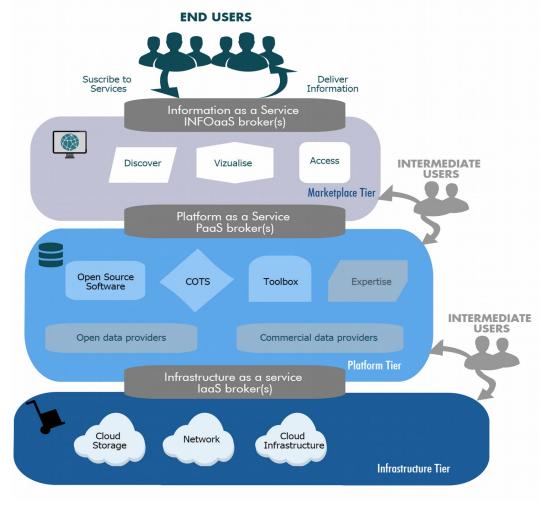
Working together













What is EARSC doing?

- Organise the EO Marketplace Alliance providing a common voice for the EO Services sector
- 2. **Define requirements for platform(s)** giving access to data and services and which could apply / host the marketplace
- 3. Develop markets through links with other commercial sectors and work with ESA to develop the market with International public bodies.
- **4. Ensure public needs are met** by working with DG Grow, DG Connect and DG RTD to align the platform services for Copernicus and for GEOSS
- 5. Engage with the GEOSS community to bring the results of EU R&D activity onto the platform(s) and to promote EU capabilities into GEOSS
- **6. Actively promote the Marketplace** and the services offered.



First Steps towards a Marketplace

Establish the Marketplace Alliance

- Address legal, commercial and governance issues
- Analyse potential public-private partnership models

Support Initial steps to develop a platform for the Marketplace

Initiate definition of design requirements for the Marketplace platform

Initial Copernicus & EO Services platform development

Develop a demonstration / proof of concept

Improve access to Copernicus data and products (Infrastructure development)

Sentinel products in commercial cloud service





European Association of Remote Sensing Companies



Thank You



• • How can ESA Help?

- 1. Support development of European EO platforms to improve satellite EO data availability to downstream users;
- 2. Support for developing the market, with ESA as ambassador to open doors and develop links with public customers e.g. international development agencies; and via EARSC to create links with commercial sectors (like OGEO);
- **3. Lead innovative procurement** of services for EO missions / supporting elements through <u>procurement of services</u>;
- **4. Stimulate private investments** by helping to clarify the boundary between public and private efforts, and developing PPPs with EC and Industry;
- 5. Improve co-ordination with the EC to align objectives, synchronise programmes and prepare strategic plan with industry. We see that ESA proves technology; EC ensures transition to operational status where appropriate.



How can the EC help?

- **1. Leverage Copernicus** by establishing Copernicus data and information access services using private sector means;
- **2. Stimulate demand** via anchor tenancy for the supply of governmental services; and using lighthouse projects as a potential instrument?
- 3. Improve R&D uptake by targeted research actions, engaging industry;
- **4. Help with access to and build upon existing IT Infrastructure** e.g. Helix Nebula, GÉANT, EGI etc. Can BDVA play a role?
- **5. Promote European excellence in GEOSS** provide means for EU products and services to be offered to GEO stakeholders;
- **6. Define the public private roles**: the boundary between public and private efforts to enable private investments.
- 7. Organise a PPP/Structured Dialogue a forum for stakeholders to communicate and develop aligned plans.

