

EARSC



European Association
of Remote Sensing
Companies

Views of the EO Services Sector on a European Space Strategy

Geoff Sawyer, EARSC Secretary General



Background: Strategic Context

The environment for EO downstream activities is changing rapidly and dramatically!

- New observation capacity is being launched with many new constellations and companies with new business concepts: data is becoming a commodity.
- Processing technology is altering the way in which data can be turned into information with heavy processing power.
- Commercial cloud operators are shifting the paradigm from “data to users” to “users to data”.
- Large IT players are starting to see the opportunity presented by “big data” and have entered the market to supply services.

Mostly, this is happening in the US and not in Europe



Strategic Context 2

Copernicus was introduced in Baveno (1998) to overcome the duplication of efforts in the development of space observation missions.

After 18 years it has led to the world's first and leading operational constellation of spacecraft with continuity of service.

Copernicus Services have led to 7 operational bodies (EEE's) serving European public policy.

In the US, NGA provides a single government customer;

- anchor tenancy with DigitalGlobe
- CIBORG initiative to buy data from commercial-driven missions
- Outsourcing of GeoIntelligence (GEOINT) to private companies – will lead to commercial capacity to compete with EU value adding companies.

Europe has a structural problem with an organisation gap.



European Space Strategy

What we need:

1. A large, European-level, non-military initiative built as a network around data and information to overcome the lack of a single, European customer,
together with
2. A number of measures which can put the elements in place to benefit from the larger initiative.

There are 6 key measures which we propose.



European Space Strategy

What does the EO Services Industry look for in a European Space Strategy?

1. Leveraging of Copernicus to help develop the sector
 - Enable easy and efficient access to Copernicus and other data
 - Maximise the exploitation potential of Copernicus
2. Improved Benefit from Research and Development Actions
 - Increase R&D effort towards EO Services
 - Improve industrial participation and exploitation potential
3. Support for the creation and development of the market
 - Enable private initiatives
 - Utilise public policies to enable market uptake

Overarching message: We must work together: it is a European strength.



ESS 1 - Leveraging of Copernicus

Key Measure 1: **Enable easy and efficient access to Copernicus and other data**

- Facilitate the access to Sentinel data and Copernicus Services
- Ensure the availability of necessary, large-scale infrastructure as a service
- Enable access to European open-data (consider a large initiative to establish a European facility around data and information)

Key Measure 2: **Maximise the exploitation potential of Copernicus**

- stimulate the public demand for Copernicus products and services
- Ensure the industrialisation of Copernicus services
- Clarify the boundary between public institutions supplying geospatial services and private industry
- Adopt industrially focused quality measures
- A programme to help the industry establish international partnerships



ESS 2 - Improved Benefit from R&D Actions

Key Measure 3: Increase R&D effort towards EO Services

- geospatial information needs of users should drive the focus of R&D investment
- Increase the R&D budgets available for EO services

Key Measure 4: Improve industrial participation and exploitation potential

- Give more attention to the exploitation of research projects; new measures to ensure a realistic exploitation plan is a project output.
- Avoid duplication of what already exists



ESS 3 - Support for the creation and development of the market

Key Measure 5: **Enable private initiatives**

- Give preference for implementation in the private sector
- Procure services rather than infrastructure
- Facilitate the emergence of new business models
- Create a specific financial facility for downstream industry development

Key Measure 6: **Utilise public policies to enable market uptake**

- Encourage the uptake of geospatial services through an anchor tenancy
- Link the use of Copernicus Services to public policy-making through legislation
- Enable the link between CDIAS and the international efforts for GEOSS
- Ensure the EU EO geospatial services sector can participate to international initiatives such as UNFCCC, GEO, REDD+