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Chairman's message

Once again I am pleased to report a year of excellent progress for EARSC and the European industry. This is the second annual report which we have published in this form and I welcome this initiative and especially the knowledge that EARSC messages are reaching an ever growing audience.

This will be my last year as chairman of the Association. It has been an exciting 7 years which has seen enormous change within the industry.

- There has been a strong increase in commercial initiatives, especially in what is being referred to as "new space" leading to new private ventures in the US.
- In Europe, the Copernicus programme starts to become operational with the launch of the third satellite - Sentinel 3a - just before I write. The next milestone will be the launch of Sentinel 1b scheduled for 2 weeks' time which will double the Copernicus radar observation capacity.
- Around the world, more and more countries are becoming engaged in deploying space systems bringing new opportunities but also threats.
- The advent of new technologies in IT (cloud, networks, mobile), data sources (UAV's, crowd sourcing) is creating new and emerging opportunities – but also challenges.

The 2nd industry survey carried out by EARSC and published in 2015, shows a sector growing at 8% per annum with over 7000 directly employed jobs and nearly €1b revenues in Europe. This is before any data or information became available from Copernicus which should have a larger impact in the future.

EARSC has been active in promoting the industry and particularly for its involvement in the Copernicus programme. We have been concerned about the access industry will have to Sentinel data and the lack of a European capacity to host the large volumes of data with adequate processing capacity. We are pleased that the European Commission starts to recognise this and take steps to ensure that a European programme provides a European access platform – as a service. In the same context, we are encouraging public procurement of services rather than infrastructure.

One of the big issues which we have been raising over the last few years is to clarify the boundary between public and private actors. This is a serious issue which inhibits private investment in new products and services. We believe that the sector will be held back until this problem is addressed. We are happy that this is increasingly being recognised by the European authorities and look forward to concrete actions to overcome this barrier to development.

In 2015, we have taken steps to introduce an industry certification scheme which will help small companies gain a professional recognition. This will become fully operational in 2016.

More recently, we have started to address the question of fragmentation of the industry sector in Europe. The many small and micro companies face many hurdles to growing their business. We are studying the concept of a Marketplace Alliance for EO Services which we plan to have in place by the end of this year.

Once again, I wish to thank my fellow directors for their time and support in moving the industry forward as well as the untiring efforts of the secretariat led by Geoff Sawyer with Monica Miguel-Lago and Ariane Dubost making up the team. I have fully enjoyed my time as EARSC chairman and am proud to be leaving the Association in a much stronger position than when I took up the post in 2008. I wish the next chairman much success addressing the many challenges which remain.

Han Wensink,
EARSC Chairman,
April 2016
Market Development

EARSC studies

Industry Survey

The 2015 industry survey takes a comprehensive look at the state of the EO services industry in Europe and Canada. This survey has been conducted by EARSC for the second time in 2014-2015 with a special focus on information which would display Copernicus’ impact on the market.

A comprehensive report was published in September 2015. We found that the total revenue in 2014 was €911m (€786m in 2012) and direct employment was 6811 (5928). The number of companies has grown from 389 in 2012 to 451 in 2014, with, as would be expected, most of this driven by the creation of new micro and small enterprises.

Public Bodies survey

During 2015, we took the decision to complement our survey of the industry with a picture of the public sector bodies active in EO. This will help us to understand and develop the market for EO services. Hence, a dedicated questionnaire was sent to Public institutions in Europe - generating or using geospatial information products - to develop a detailed understanding of how Copernicus will impact the sector. The analysis showed that 80% of respondents currently benefit from Copernicus data or products or expect to benefit in the future and only a quarter of the sample purchase data from external providers. A report has been published in April 2016.

AARSE Study

The European Commission has asked EARSC to compile an inventory of EO services companies in Africa. EARSC and AARSE the African association for remote sensing of the environment are involved in the project under the SpaceTec User Uptake framework contract. The project will help to better understand potential investment to promote export activities in Africa. The questionnaire, based on our industry survey, is being circulated to African companies. The results of the study will be available in May/June 2016.

Copernicus Sentinel’s Products Economic Value study

In studies looking at public sector investments (eg in Copernicus), socio-economic studies analyse the economic benefits which will be generated. For EO programmes, this approach is very top down looking at broad brush benefits. In a study funded by ESA, we, EARSC, in collaboration with the Green Land BV, have been developing an alternative approach which is very focused and bottom-up. The goal of the study was to gather quantitative evidence that the usage of Copernicus Sentinel data provides an effective and convenient support to various market applications. This series of reports looks at the economic value being created by a single EO product and its cascaded effects for each tier down to each specific value chain.

We have studied three cases:
- Winter Navigation in the Baltic
- Forest Management in Sweden
- Infrastructure Monitoring in the Netherlands
Engagement with the oil and gas sector

EARSC is strengthening its links with the Oil & gas industry through the industry umbrella association OGP (Oil and Gas Producers); EARSC being an observer member of the OGP – EO subcommittee. In particular, we opened the EO4OG section a new part of the OGE Portal gathering the results of the EO4OG project to all portal users.

Moreover, we are publishing OGEOzine on a quarterly basis. This newsletter shares information between the Communities but especially brings news on how Earth Observation can be used in the Oil and Gas industry.

Engagement with the farming sector

EARSC has been establishing contacts with COPA-COGECA which represents European farmers and cooperatives in the EU. Geoff was invited to address their Agritech task force meeting on 9 December 2015 and presented the capabilities of the EO industry for the agriculture and farming sector. The role of remote sensing on the future of agriculture and the impact of big data in that sector were discussed. It is a first step to creating a community for exchange with the farming sector.

Engagement with Unmanned aerial vehicles

Remote sensing from a remotely piloted aircraft (RPA) is a maturing technology, which offers many complementary capabilities to satellites and aircraft. RPA is another form of platform to carry sensors tuned to observe various characteristics of the Earth’s surface. EARSC has contributed to the 2015 RPAS yearbook.

Export

EARSC is developing a strategy to help support the industry in export markets. This year, efforts were concentrated on Japan. A B2B meeting between Japanese and EU companies engaged in Space activities was attended by Geoff as well as 3 EARSC member companies on 9-11 March 2015. They met with representatives of several companies including BizEarth which is an informal grouping of those in the EO sector and hence the closest equivalent to EARSC in Japan.

More export actions are expected in the framework of eovox4.
Recognising a need to structure products and services, EARSC revised and issued the second version of the EARSC Taxonomy for the EO Services Market in August 2015. The document provides a clear and common description of EO products and services which will help suppliers and customers arrive at a common understanding of what can be offered.

Both versions are available online: http://earsc.org/library/

Certification scheme

One of the key barriers to the growth of the industry and the use of Earth Observation products and services is the level of confidence that customer organisations may have in the products or services being offered. To address this issue, the EARSC Certification Scheme was launched during this year’s AGM. It is designed to help companies obtain a management certification specifically adapted to the needs of the EO Services industry.

More information can be found in the EARSC Certification Scheme section of our website.

An expert meeting has been organised around the subject “Harmonization of validation methods in Copernicus Land Cover/Land Use” last January in Brussels. Experts discussed the role played by certification validation and certification of methods in Copernicus Land products to improve the procurement of land products by the EEA and gave a first insight of the type of products EEA need to be improved and possibly certified. A first set of short terms actions have been proposed and a road map should be developed.

*Peter Hollidge presenting the EARSC Certification Scheme at the AGM, 17 June 2015*
Participation to meetings & presentations

Over the last year, EARSC has represented the industry on many platforms, a few of these being:

- Space Policy Workshop (27th Jan 2015, Brussels)
- TUSE, Unmanned Systems Expo, Netherlands (04 Feb 2015, The Hague)
- GEO and the Private Sector, Workshop (11 Feb 2015, Washington)
- Legal Symposium on European space services and applications (18 Feb 2015, Munich)
- European Parliament hearing on HRSD (04 Mar 2015, Brussels)
- H2020 Industry Meeting (13 Mar 2015, Brussels)
- Growth by Copernicus – ISRSE (13 May 2015, Berlin)
- OECD Forum: EO Services Ecosystem (22 May 2015, Paris)
- ESA High Level Industry Forum (02 June 2015, Noordwijk)
- EESC Space & Society final Conference (29 June 2015, Brussels)
- Razor: overview and role of SME’s in European Space Sector (30 July 2015, Milan)
- ESA/EARSC Meeting on Ground Segment (02 Sep 2015, Frascati)
- ENEON workshop presentation (ConnectinGEO, 22 Sep 2015, Paris)
- GSCB workshop (24 Sep 2015, Frascati)
- EARSC meeting with ESA DG, Jan Woermer (05 Oct 2015, Paris)
- WorldView Global Alliance: EO Industry now and the future (13 Oct 2015, Munich)
- New horizons for European and Global land monitoring (19-20 Oct 2015, Copenhagen)
- H2020 information day on innovation procurement (27-28 Oct 2015, Paris)
- H2020 Space Information Day (09-10 Nov 2015, Brussels)
- GEO XII Plenary (09-13 Nov 2015, Mexico)
- G. Sylos Labini Presentation, AIPAS: Downstream at Copernicus User Forum (20 Nov 2015, Rome)
- COPA COGEC Agri Tech task force meeting (09 Dec 2015, Brussels)
- European Space Policy Conference (13 Jan 2016, Brussels)
- Access to Finance for the Space Industry Workshop (25 Jan 2016, Brussels)
- Copernicus user forum (8 Feb 2016, Brussels)
- Polish space sector forum (9 Mar 2016, Warsaw)
**EARSC meetings**

EARSC organizes several meetings a year on specific topics, inviting all its members to participate along with invited guests.

**Annual General Meeting**

The first results coming from our 2015 industry survey were presented at the pre-AGM workshop on 16th June. The workshop provided a first opportunity to share some of the findings and to gather ideas on how to make the process easier and even more effective in the future.

![Geoff Sawyer presenting the initial results of the industry survey](image1)

![Participants of the EARSC AGM](image2)

After the AGM we held a workshop focused on Copernicus Services. The meeting was aimed at fostering the dialogue between all the European Entrusted Entities (EEEs) and the European private sector. The objective was to find a way forward for industry and the EEE’s to maximize the exploitation of Copernicus Services. Around 50 people from the private sector, EC and representatives of each of the 7 EEE’s joined the discussion. A report of this workshop is available online.

**Meeting on Copernicus Services and the industrial role**

Alongside EARSC EGM (6 October 2015), we invited representatives from the three units of DG-GROW to share their views on the relationship with industry. The evolution of Copernicus services, the importance of Space data for societal challenges and growth and the upcoming H2020 calls were exposed and discussed among the 40 participants.

![Mauro Facchini at the EGM workshop](image3)

**Innovation Procurement event**

EARSC together with BHO-Legal organized a workshop on the subject of PCP (pre-competitive procurement) to guide companies on how to approach the H2020 call EO-2-2016: Downstream services for public authorities. The event seemed very appreciated by participants who discussed around different reasons for companies to participate in PCP.

![Ingo Baumann (BHO Legal) introducing PCP approaches](image4)
Meetings coorganised

GSCB Meeting

On 24th September ESA hosted a day workshop in Frascati with the Ground Segment Coordination Body (GSCB) to discuss this strategy and invited industry as a stakeholder. A preparatory meeting was held with EARSC on 2nd September to develop agreed views which were presented by Geoff at the GSCB meeting. The outcome was very positive and a regular dialogue will be established to guide the development of the future infrastructure (EO Innovation Europe) and how it should be governed.

EEA workshop

On 4th December, EARSC organised with EEA an Information session on the upcoming calls for tender for Copernicus full operation, land service, pan-European and local components. EEA provided information on the CfT with some additional opportunity for service industry feedback.

EARSC Tools

Our website offers access to the essential information on EARSC tools, resources and the member’s community. All our reports, position papers and presentations are available in the library. It is also the gateway to other EARSC tools.

Portal

EARSC portal is one the gateway to information and knowledge for members of EARSC, the broader EO scene and its users’ communities.

EOpages

EOpages is a brokerage platform to help potential customers find suppliers whilst service providers will be able to promote their products. EOpages shows the capabilities of the geo-information industry in general and value-adding companies in particular.

In the following months, we intend to further develop this tool to provide improved means for potential customers to find service providers which can meet their needs in the context of the European Marketplace.

Eomag

Eomag! is the EARSC newsletter. Latest interviews featured:
· Andreas Veispak, Head of Unit, DG Grow
· Chris Steenmans, Head of programme, ICT and data management at the EEA
· 2015 EARSC Company Award winner, Peter Volk, CEO and Director of GAF AG
· Alain Ratier, EUMETSAT General Director
· Pierre Bahurel, Director General, Mercator Ocean
· Nicolaus Hanowski, Head Ground Segments and Operations, Directorate of ESA EOP

Social media

Twitter: @earsc
LinkedIn: EARSC group

Read our Secretary General’s blog: http://earsc.org/blog/
Policy development

EARSC is recognised as a leading voice to represent the EO Services industries and working with both ESA and the European Commission to establish a constructive approach. Over the past few months, EARSC has expressed its view in several position papers (see the list below).

List of EARSC Position papers since 2015:
• Creating a European marketplace for EO services
• Creating a European Alliance for Earth Observation (EO) Services Responding to GEOSS
• EARSC views on European Geospatial services: Developing the Private Sector Capability
• EARSC input to ESA EO Strategy

ESA
EARSC has met ESA DG, Jan Woerner, twice in the last few months. The first meeting took place on October 5th 2015, Geoff and representatives of the Board presented EARSC and the EO services industry as well as ideas around the evolution of the ground segment and establishing a European Marketplace.

On 14th January 2016 directors presented more detailed industry views for the response to the ESA DG’s question: How can ESA help the EO business to develop. The response was very positive and discussion is developing further on the creation of a Marketplace Alliance.

EU institutions

Copernicus
EARSC has been strongly engaged with the EC and other stakeholders over the industrial role in the Copernicus programme (see our various position papers). Our concern is that there is an unclear definition of what the private sector companies and the public sector bodies respectively can and should do.

The workshop organized alongside EARSC AGM in June 2015 is a first step towards a formal exchange. EARSC will work together with the EEE’s to produce a roadmap for the Exploitation of Copernicus.

Three main lines of action are:
• Growing the Market: there is a mutual interest to see growing use of Copernicus products and services. EEE’s and industry can work together to promote the uptake of services into the public sector as well as other potential customers in new markets.
• Introducing new products into Copernicus Services: a co-ordinated approach is needed to bring new products into the scope of Copernicus Services which may be those developed by industry or a public body. Means should be found to ensure that prior investments are respected but that new opportunities are developed.
• Setting R&D priorities: co-operation will enable a better approach to the use of R&D funds (H2020 and other) for development of new processes and products as well as ensuring capacity is available to meet both public and private sector needs.

European Parliament
On 1 July 2015, the European Commission decided to withdraw the proposed Directive on Dissemination of Earth Observation Satellite due to strong diverging point of views within the Council and within the Parliament.

In 2016, two initiatives caught our attention. As the European Commission is elaborating a communication document “A Space Strategy for Europe”, the European Parliament is working to prepare their views in advance and to respond to the EC proposals once they are published later this year (around October 2016). EARSC will be in contact with the MEPs drafting the resolution on space strategy in which the emphasis will be put on market uptake of space data. Another initiative is the Space capabilities for European security and defence. The possibility of having a European Hires satellite was raised.
Research and Development

EARSC has been asked to provide views on the H2020 space priorities for the 2018/2019/2020 work programme. We have also been working with Eurospace to organise an industry meeting on March 13th 2015 where EARSC vice-chairman Chetan Pradhan presented on our views on priorities for the EO part of the work-programme and moderated a panel discussion on industry perspectives on H2020.

EARSC has been accepted as a GEO Participating Organisation in March 2016. This is a critical step forward in GEO’s efforts to collaborate with the private sector in mutually beneficial way. As a Participating Organization EARSC will share opinion on industry views at EU level, exchange on documents of common interest and co-operate on projects or promotional activities where relevant.

In addition, EARSC is participating as partner at the ConnectinGEO project which aims to link a number of European networks with science communities and GEOSS and Copernicus stakeholders with the objective to facilitate a broader knowledge base, exploitation and support to the Societal Benefit Areas addressed by GEOSS. As part of this project, EARSC launched the competition “European EO product of the year” rewarding a company which has developed the most innovative product integrating an element of open data ideally discoverable through the GEOSS broker services. In this context, a webex session on Access to GEOSS data was held last 30th of November where companies had the opportunity to be briefed on which types of data are available through the GEOSS – GCI Factsheet (Recipe) and making use of the GEOSS Discover Access Broker (Search & Discovery API).

EARSC is also participating to the H2020 GEO-Cradle project. The project will looks into EO Activities in the regions of North Africa, Middle East and Balkans and Developing Links with GEO.

European Economic and Social Committee

EARSC has been a partner of the EESC project “Space & Society: bridging the missing links”. The project aims at raising awareness, generating support from civil society and policy makers in space programs and defining new and concrete actions to be implemented in this context. The final conference hold on June 29th, 2015 reported on the local events and recommendations and explored future actions. The platform will continue in the following year.

ASAS

In October 2015, EARSC signed a Memorandum of Understanding with the Italian Association for Space-based Application and Services, ASAS with the purpose to share opinion on policy issues at both at EU institutions level and Italian national policies, exchange on documents of common interest and co-operate on projects or promotional activities where relevant.
EARSC and its members

EARSC represents the Earth Observation geo-information services companies in Europe. Our members include both commercial operators of EO satellites and downstream, value-adding companies. The sector plays a key role in providing value-added geo-spatial information to its customers in Europe and the world. Our survey in 2015 showed that the sector employs about 7000 highly skilled persons and is generating revenues of over €910 per annum.

EARSC annual cocktail

We repeated our pre AGM cocktail, a tradition started in 2014 for our 25th anniversary. The event was enjoyed by all the 70 participants and we were delighted to welcome Mme Iskra Mihaylova as our distinguished guest. Mme Mihaylova is a MEP from Bulgaria and Chair of the Regional Committee (REGIO) in the European Parliament. The cocktail was sponsored by Geoville the winner of the 1st EARSC Company of the year award.

The name of the EARSC company of the year award-winning company was also announced at this occasion. The second winner of this now prestigious award is GAF. GAF is one of the longest-lived companies in the sector and this achievement was recognised by EARSC members in delivering the award to them this year.

EARSC statutes

At the AGM, members were asked to vote on changes to the EARSC statutes. However, the vote did not reach a quorum of 2/3rd of members voting (51). Therefore, EARSC called an extraordinary general meeting last 06 October 2015 in Brussels to vote on the new statutes. There were 32 votes in favour to change the statutes (participants and proxy votes) with none against. Since a simple majority was needed, the amended EARSC Statutes have now been approved. Statutes are now under EARSC website.
EARSC Awards
Company Achievement Award

First introduced for the Association 25th anniversary, the EARSC Company Award recognises significant achievement by a company in the field of EO services. The scheme has now run for two years and will be repeated in 2016. The qualification criteria are broad and include the introduction of new products or services, entry into new markets or generally the approach to doing business. Members are asked to nominate two companies then all companies nominated then go into a vote by all EARSC members. The final selection of the winner is made by an independent jury comprised of recognised experts.

European EO product of the year

Building on the success of the Company Achievement Award, we have launched a new competition "European EO product of the year" which will encourage the use of open data from GEOSS (Global Earth Observation System of Systems). It is developed under the H2020 project ConnectinGEO and will be supported by our partners in that project. This year’s award will be announced during the EARSC annual cocktail where the winner of the EARSC “European Earth Observation company of the year” is also revealed.

Working groups

Several working groups have been active this year:
- The Industrial Best Practice group
- The Copernicus Services Working group
- The High-Resolution Regulation group
- The Preparation for ESA CMin 2016 group

New members since June 2015:
- Deimos Imaging
- earth-i
- GEO4i
- Kapitech
- Noveltis
- PlanetObserver
- Spaceteam Partners
- TerraSIGNA
Board of Directors

EARSC is supervised by a General Assembly comprising representatives of its members. Advice of the daily running is provided through the EARSC Secretariat and regular contact between secretariat and Board of Directors (BoD). EARSC BoD focuses on the governance and policies of the Association, on the working groups and opportunities on external events for active member participation. The board for 2015-2016 is:

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman</td>
<td>Han Wensink</td>
<td>OceanSpaceConsult</td>
</tr>
<tr>
<td>Vice-Chairman</td>
<td>Chetan Pradhan</td>
<td>CGI</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Celestino Gomez</td>
<td>GMV</td>
</tr>
<tr>
<td>Director</td>
<td>Christian Hoffmann</td>
<td>Geoville Group</td>
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<tr>
<td>Director</td>
<td>Nöel Parmentier</td>
<td>Rhea Group</td>
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<tr>
<td>Director</td>
<td>Massimiliano Vitale</td>
<td>Blackbridge</td>
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<tr>
<td>Director</td>
<td>Giovanni Sylos Labini</td>
<td>Planetek</td>
</tr>
<tr>
<td>Director</td>
<td>Francis Vanderhaeghen</td>
<td></td>
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<tr>
<td>Director</td>
<td>Kamen Iliiev</td>
<td>TAKT IKI OOD</td>
</tr>
<tr>
<td>Director</td>
<td>Marcello Maranesi</td>
<td>e-geos</td>
</tr>
<tr>
<td>Director</td>
<td>Vark Helfritz</td>
<td>Airbus Defense and Space</td>
</tr>
<tr>
<td>Director</td>
<td>Markus Probeck</td>
<td>GAF AG</td>
</tr>
</tbody>
</table>

Views of EARSC BoD meetings, Brussels

Financial Situation

EARSC is in a sound financial situation. The last year saw a small operating profit. Membership fees still fall well short of covering the core secretariat costs of the Association and revenues from projects are necessary to maintain the current level of activity.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership fees</td>
<td>96.3</td>
<td>106.4</td>
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<tr>
<td>Projects</td>
<td>285.4</td>
<td>217.6</td>
</tr>
<tr>
<td>Other</td>
<td>6.2</td>
<td>5.0</td>
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<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
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<tr>
<td>Secretariat fees</td>
<td>181.2</td>
<td>174.6</td>
</tr>
<tr>
<td>Office and other costs</td>
<td>23.2</td>
<td>26.2</td>
</tr>
<tr>
<td>Project costs</td>
<td>180.6</td>
<td>111.2</td>
</tr>
<tr>
<td>Audit &amp; accounting fees</td>
<td>2.0</td>
<td>4.4</td>
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<tr>
<td><strong>Profit / loss for the year</strong></td>
<td>0.7</td>
<td>12.6</td>
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<tr>
<td><strong>Reserves</strong></td>
<td>128.4</td>
<td>141.0</td>
</tr>
</tbody>
</table>
**EARSC Membership**

EARSC has 75 members from more than 22 European countries. For our members, the annual membership dues are a cost-effective way to stay informed, promote their company, engage with political and institutional representatives, have networking opportunities with other industry players and help to support the future of geo-information Industry.

EARSC is open to full and observer members which are active in the geo-information sector. Membership gives you the opportunity to add your voice to the issues that matter, influencing national policy and setting industry standards.

**Full Members shall be:**
- any commercial company providing services (including consultancy) or supplying equipment in the field of remote sensing shall be eligible for full membership.
- based in a European country which contributes to the European Space Agency or which is a member of the European Union.

**Observer members can be:**
- any organisation engaged in the supply or use of Remote Sensing which does not qualify to become a full member of the Association.

<table>
<thead>
<tr>
<th>Profile</th>
<th>Employees in EO and geo-information</th>
<th>Yearly fees in 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small, new companies formed in last five years</td>
<td>5 or less employees</td>
<td>1st year €250 / 2nd year €500 / 3rd year €825</td>
</tr>
<tr>
<td>Small companies</td>
<td>&lt;10 employees</td>
<td>€825</td>
</tr>
<tr>
<td>Medium Companies</td>
<td>11-50 employees</td>
<td>€1,650</td>
</tr>
<tr>
<td>Large Companies</td>
<td>&gt;51 employees</td>
<td>€2,750</td>
</tr>
<tr>
<td>Observers</td>
<td></td>
<td>€1,100</td>
</tr>
</tbody>
</table>

For information on Membership rights or if you want to join the network please go to earsc.org/joinus

**Futures activities**

EARSC priority remains strongly focused on helping the industry to access new markets. Many actions are foreseen over the next 12 months including:

- EARSC will promote the Marketplace alliance at different events in the next few months and to a large range of stakeholders. In parallel, we shall also examine the legal and governance aspects of the Marketplace Alliance and prepare the business plan. Our plan is to establish the legal entity by end 2016.
- Continue to link with the European institutions; Copernicus policy, procurement and services including industrial participation, EC concerning hi-res data policy, EC role in GEO, and EO sector industrial policy and ESA concerning the industrial policy and role in EO services development including a potential new programme of support activities.
- Continue to promote the wide range of capabilities of the industry through market development activities focused on users in other commercial sectors and to exports markets.
- Further develop the industry certification scheme to ensure a professional service and quality products supplied by the industry.