ANNUAL REPORT 2016
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Picture 4 © Airbus Defence and Space
After my first year as chairman of EARSC, I am very pleased with the further progress made to develop EARSC into a strong organisation which can support our industry, building on the progress made in previous years. For this, on behalf of all directors, I thank Han Wensink who was chairman from 2008 until last year and who has contributed so strongly to the development of EARSC.

In the last year, we have seen major developments on several fronts.
At the start of 2016, ESA agreed to support our efforts to create a new on-line marketplace for European EO services. This led to a major study and helped us define the structure and modus operandi for a new Marketplace Alliance for EO Services (MAEOS). A key element will be an on-line tool known as eoMALL, to help find new customers and develop new business prospects for EARSC members. This will be a major activity for EARSC this year and in future years.
MAEOS is made possible by the initiative taken by the European Commission to develop a new Copernicus Service – led by industry – to make it easier to access Copernicus Data and Information. This follows several years of EARSC arguing that lack of adequate access to the data was holding our industry back. We are very pleased that the EC has reacted to initiate the DIAS and eagerly await the launch of the service.
We are increasing our market analysis activities. After publishing 3 cases demonstrating the enormous value derived from using EO data in specific value-chains, we are delighted to have won a major contract to continue this work with a further 20 cases over the next few years. Furthermore, analysis of the data collected for the 3rd EARSC survey of the industry is currently under way and a report will be published around the middle of this year. We were also pleased to work with AARSE (African Association for Remote Sensing of the Environment) to compile an inventory of African companies working in Earth Observation which has been integrated into an Africa EO pages.
We are increasing our activity for market development. During 2016/2017 we have organised 4 export missions: two to Japan, one to Kampala (October 2016) on the occasion of the AARSE conference and one to Pretoria (May 2017) during the ISRSE37. The latter have both have led to increased contacts between African and European companies, and more similar missions will be targeted in the future. Further, we seek to establish links with other trade sectors through umbrella organisations – just as we have managed with the oil and gas sector. Please be ready for announcements on these in the next few months and please contribute for EARSC to address your priorities.
Lastly, but certainly not the least, EARSC has moved into a permanent office for the first time in its history. This was made necessary as the team expanded and we now welcome Emmanuel Pajot and Natassa Antoniou to EARSC. Emmanuel will be focused on moving MAEOS and eoMALL forward whilst Natassa has the exciting task to increase our market development activities. You will hear a lot more from her as she establishes new export initiatives and develops links with other commercial sectors.
EARSC is continuing to grow and at the time of writing we have 92 members up from 81 this time last year. We are present and recognised on the world stage. We became a Participating Organisation with GEO in March last year and signed a co-operation agreement with Japan Space Systems in November.
It remains to thank my fellow directors for their time and support in developing EARSC and 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 in 2016 and now reinforced with Emmanuel and Natassa for 2017. I look forward to the next 12 months with great hopes and expectations for our sector.

Chetan Pradhan
EARSC Chairman, May 2017
About EARSC

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 Membership

EARSC has 90 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

List of new members since January 2016

AgroApps
Airborne Technologies
Air & Space Evidence
ALPHA Consult
CloudFerro
Draxis
earth-i
ESRI Global Inc
ESRI Romania
Exelis Visual Information
Geo4i
isardSAT
Kapitech
Neupublic
Noveltis
NQA
PlanetObserver
PwC
rasdaman
Sinergise
SIRS
Space Applications Services
Specto Natura
TAS
Telespazio VEGA UK
Terradue
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 as elected during the AGM 2016 is:

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman</td>
<td>Chetan Pradhan</td>
<td>CGI</td>
</tr>
<tr>
<td>Vice-Chairman</td>
<td>Giovanni Sylos Labini</td>
<td>Planetek</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Celestino Gomez</td>
<td>GMV</td>
</tr>
<tr>
<td>Director</td>
<td>Han Wensink</td>
<td>OceanSpaceConsult</td>
</tr>
<tr>
<td>Director</td>
<td>Christian Hoffmann</td>
<td>Geoville Group</td>
</tr>
<tr>
<td>Director</td>
<td>Nöel Parmentier</td>
<td>Rhea Group</td>
</tr>
<tr>
<td>Director</td>
<td>Massimiliano Vitale</td>
<td>Planet Germany</td>
</tr>
<tr>
<td>Director</td>
<td>Karen Iliev</td>
<td>TAKT IKI OOD</td>
</tr>
<tr>
<td>Director</td>
<td>Markus Probeck</td>
<td>GAF AG</td>
</tr>
<tr>
<td>Director</td>
<td>Andre Jadot</td>
<td>Eurosense Belgium</td>
</tr>
<tr>
<td>Director</td>
<td>Massimo Comparini</td>
<td>e-GEOS</td>
</tr>
<tr>
<td>Co-Opted Director</td>
<td>Rob Postma</td>
<td>Airbus Defense and Space</td>
</tr>
<tr>
<td>Expert Advisor</td>
<td>Francis Vanderhaeghen</td>
<td>Independent</td>
</tr>
<tr>
<td>Expert Advisor</td>
<td>Marcello Maranesi</td>
<td>Independent</td>
</tr>
<tr>
<td>Honorary Director</td>
<td>Emile Maes</td>
<td>Eurosense Belgium</td>
</tr>
</tbody>
</table>

Views of EARSC BoD meetings, Brussels

Financial Situation

EARSC is in a sound financial situation. 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>All figures in €k</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>329.0</td>
<td>520.8</td>
</tr>
<tr>
<td>Membership fees</td>
<td>106.4</td>
<td>104.8</td>
</tr>
<tr>
<td>Projects</td>
<td>217.6</td>
<td>413.8</td>
</tr>
<tr>
<td>Other</td>
<td>5.0</td>
<td>2.2</td>
</tr>
<tr>
<td>Expenses</td>
<td>316.6</td>
<td>528.6</td>
</tr>
<tr>
<td>Secretariat fees</td>
<td>167.4</td>
<td>234.9</td>
</tr>
<tr>
<td>Office and other costs</td>
<td>26.2</td>
<td>40.3</td>
</tr>
<tr>
<td>Project costs</td>
<td>111.2</td>
<td>250.0</td>
</tr>
<tr>
<td>Audit &amp; accounting fees</td>
<td>4.4</td>
<td>3.4</td>
</tr>
<tr>
<td>Profit / loss for the year</td>
<td>12.6</td>
<td>(8.1)</td>
</tr>
<tr>
<td>Reserves</td>
<td>141.1</td>
<td>133.0</td>
</tr>
</tbody>
</table>
EARSC and its members

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 2017. 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. Deimos Imaging are the third winner of this now well-appreciated recognition for a European company which has made a significant contribution to the development of the business in the previous 12 months.

European EO product of the year

For the first year, under the umbrella of the EU Framework Program for Research and Innovation ConnectinGEO project, the EARSC competition “European EO product of the year” rewarded a company which has developed the most innovative product integrating any source of open data. The winner in 2016 was Jeobrowser for their product Rocket: The Earth in your Pocket. The competition will be repeated in 2017 around the support to the implementation of the Sustainable Development goals.

EARSC Annual Cocktail

Winners of the two EARSC awards 2016 were presented at our annual cocktail on Tuesday 21st June 2016 in Brussels. The event was enjoyed by all as a great opportunity where industry can meet decision makers. The cocktail was sponsored by GAF AG, Planet Germany Gmbh and Spacetec Partners.

On the left side: Markus Probeck (GAF AG), Fabrizio Pirondini (CEO Deimos Imaging), Sebastian Carl (GAF AG), Massimiliano Vitale (Planet Germany) and Geoff Sawyer (EARSC SG) | On the right side: Participants of the cocktail
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” in January 2016 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.

EARSC TOOLS

Our website earsc.org offers access to the essential information on EARSC tools, resources and the member’s community:

<table>
<thead>
<tr>
<th>Portal</th>
<th>EOmag</th>
</tr>
</thead>
<tbody>
<tr>
<td>EARSC portal is one the gateway to information and knowledge for members of EARSC, the broader EO scene and its users’ communities.</td>
<td>EOmag! is the EARSC newsletter. The magazine provide information about events, Stakeholder Interviews and Members Profiles.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EOpages</th>
<th>Social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOpages is a brokerage platform to help potential customers find suppliers whilst service providers will be able to promote their products. A key improvement made in 2016 is the introduction of a core function enabling partnering, allowing to look for industrial partners either for collaborative research projects or for tenders.</td>
<td>Twitter: @earsc</td>
</tr>
<tr>
<td>LinkedIn: EARSC page</td>
<td>Read our Secretary General’s blog: <a href="http://bit.ly/earscblog">http://bit.ly/earscblog</a></td>
</tr>
</tbody>
</table>

EARSC Booths

A first for EARSC! EARSC had booths at two main conferences in May 2016: Living Planet Symposium in Prague and European Space Solutions in The Hague. It stimulated interest in the association and its members and was a good meeting place for companies present at the events. We plan to repeat this more often in the coming months both in Europe and worldwide.

EARSC Taxonomy

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 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. We shall review it in the coming months and invite comment and suggestions as to improvements.
**EARSC studies**

**Industry Survey**

EARSC conducted its biennial industry survey to map the state and health of the companies providing EO services in Europe and Canada for the third time in 2016/2017. The executive summary with key figures will be published early July 2017 and will be used by the European Commission as one pillar of the evaluation of Copernicus. Previous reports can be found at our website.

**Public Bodies survey**

In 2015, we took the decision to complement our survey of the industry with a picture of the public sector bodies active in EO to help us understand and develop the market for EO services. 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.

**African EO Companies Study**

AARSE, the African Association of Remote Sensing of the Environment in cooperation with EARSC published an inventory of the African private EO and Geospatial industry with the support of the European Commission and Spacetec Partners. This study is the first of its kind on the continent and a start to understand how companies in Africa operate, capture their expertise and assess their state and health following the methodology developed by EARSC for its industry survey. AARSE and EARSC have analysed the data of the survey conducted between February and April 2016. The results of the study are available on our website. A dedicated section of EOpages has been developed to feature African EO companies surveyed.

**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

Detailed reports are available on our website as well as an explanatory video. Further cases will be analysed in the coming years in the framework of the study on ‘Showcasing the benefits brought by the usage of Sentinels data to society, environment and economy’ tendered by ESA.
Marketplace Alliance for EO Services

Over the past months, EARSC has been actively working on the setting up of a Marketplace Alliance. A European Marketplace for EO Services will enable companies to offer new products and services building upon those coming from Copernicus and other sources. It will allow the European industry to capitalise on the public investments in Copernicus and, by linking with other data sets, can unleash a new wave of innovative geospatial products addressing many markets.

In February 2016, EARSC declared its intention to help the industry develop a new Marketplace through which to offer services in a position paper. From May 2016 to January 2017, EARSC studied the basis on which this could be established; legal, technical, business issues. The results of the study were exposed to industry and key stakeholders at EARSC workshop "Boosting the Market for EO Services in the Digital Economy" on 25th January 2017. Following the presentation of the study, the board of directors recommended that the Association proceeds to set up eoMALL; a digital marketplace for EO services. It was decided to establish an oversight group within EARSC to drive the initiative through the next stages.

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 in our 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 EO can be used in the Oil and Gas industry.

Engagement with other sectors

EARSC has been establishing contacts with COPA-COGECA which represents European farmers and cooperatives in the EU. Closer links will be established in the near future.

As a result of the Copernicus for Raw Materials workshop organised by DG-GROW in September 2016, Geoff has met with the Euromines secretary general to discuss how to develop closer links.

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 2016 RPAS yearbook.
Internationalisation

EARSC is developing a strategy to help support the industry in export markets. In 2016, we actively participated in the workshop on the internationalisation of EO companies organised by DG-GROW in Brussels on 22nd November.

In addition we developed several initiatives in specific geographic areas:

Africa

In the context of the AARSE 2016 conference, held in Kampala, Uganda, 24-28 Oct 2016, EARSC participated in a plenary Session on 26 Oct 2016 entirely devoted to the commercial sector. Geoff Sawyer presented EARSC and its activities, Deimos, GAF and Geoville representatives joined the panel discussion. This session was followed up by a Business to Business session in the afternoon to promote further discussions, networking and collaboration opportunities jointly organized by EARSC and AARSE. The B2B event was attended by 5 European companies and 9 African companies. The creation of an African trade association and possible synergies with EARSC were discussed. The engagement with African companies will be developed further in 2017 by attending workshops both in Europe and Africa.

Japan

EARSC and Japan Space Systems signed a MoU on 23 November in Brussels, to develop synergies and strengthen cooperation in business, research and technology between Europe and Japan in the utilisation of EO technology. Pierre Delsaux, Deputy DG, DG-Grow and Mr. Takashi Omote, Minister of the Japanese Mission of Japan to the EU attended the ceremony. As a first step of cooperation between the 2 associations, EARSC together with 3 member companies – Airbus D&S, GMV and e-GEOS participated in the S-NET 4th Sectoral Meeting “EO Data Platform” in Tokyo on 15 February 2017. The event showed growing interest in Japan for consolidating EO and IT. The following day, JSS organised the first EARSC-JSS Joint EO & IT Seminar to give an opportunity for the two industries to come together and exchange ideas from fresh perspectives.

Latin America

In January 2017, EARSC has joined the ELAN Network, which supports EU SMEs’ internationalisation in Latin America. Due to the extensive network of partners in specific Latin American countries, ELAN has the potential to help EARSC find the right interlocutors and will help to capture the specific needs of the end-users in the countries where SMEs want to expand.
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 Organisation EARSC share opinion on industry views at EU level, exchange on documents of common interest and co-operate on projects or promotional activities where relevant. EARSC participated in the GEO XIII Plenary in St Petersbourg in November 2016. Geoff contributed to different events notably a panel on the Commercial sector engagement with GEO.

In addition, EARSC is participating as partner in several H2020 projects related to GEO:

The ConnectinGEO project came to an end in January 2017. It started in 2015 with the aim to provide to link existing Earth Observation networks with science, private sector and with GEOSS and Copernicus stakeholders. Following this objective, other major achievements have been reached, mainly, the enablement of the European Network of Earth Observation Networks (ENEON), and the provision of a gap analysis among existing EO networks prioritising the Sustainable Development Goals (SDG) and the Essential Variables (EV).

The GEO-Cradle project looks into EO Activities in the regions of North Africa, Middle East and Balkans and developing links with GEO. Within this project, EARSC is notably working on developing maturity indicators that will allow to capture the level and measure the progress of each country’s involvement in the implementation of GEO and Copernicus vision.

The NextGEOSS project will create a data hub that demonstrates the potential of new advances in Information and Communications Technology to help develop and deploy new services requiring a wide variety of data sources and creating a solid foundation for capacity building through GEOSS community platforms. EARSC will be contributing to bring data coming from private sources and enabling the development and commercialization of EO services.
Meetings

EARSC meetings

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

Geospatial World Forum

EARSC organised a workshop on the economic benefits of EO at the Geospatial world forum during the Geospatial World Forum in Rotterdam on 26 May 2016. The results of the study into the economic benefits of Copernicus Sentinel data was presented. It provided an excellent opportunity to bring together the principle actors from each of the 3 cases, to allow them to interchange and benefit from each other’s participation to the study and to disseminate the details to a wider audience.

Annual General Meeting

The pre-AGM workshop on 21st June exposed EARSC e-tools to members. It provided a great opportunity for the Secretariat to expose the tools and get feedback from members to make communication more efficient in the future.

After the AGM on 22nd June we held a workshop focused on the Marketplace Alliance for Earth Observation Services. The meeting was aimed at understanding better what roles the Marketplace should offer and where it can add value. Around 70 people from the private sector, the Commission, CERN and ESA joined the discussion.

Meeting on Boosting the market for EO services in the digital economy

EARSC with the support of ESA organised the workshop on “Boosting the market for EO services in the digital economy” on 25 January 2017. About 120 people attended this workshop. ESA and EARSC presented the initiatives being taken to help position European industry to benefit from the trends. In addition, leading mobile and business solutions providers shared their views on the digital economy and how geospatial information is a transformational technology for many market segments.
Over the last year, EARSC has represented the industry on many platforms, a few of these being:

- 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)
- Food Security and Agriculture Sustainability Workshop (11-12 April 2016, Frascati)
- Copernicus Value Chain Workshop (26-27 April 2016, Brussels)
- GEO workplan (2-4 May 2016, Geneva)
- ESA Living Planet (9-13 May 2016, Prague)
- Geospatial World Forum (25 May 2016, Rotterdam)
- EU Space Solutions: Bringing Space to Earth (30 May-3 June 2016, The Hague)
- EOEP-5 Industry Consultation Workshop (7 June, 2016, Frascati)
- EARSC AGM (22 June 2016, Brussels)
- European Commission Workshop on Space Markets (5-6 July 2016, Brussels)
- ISPRS (14 July 2016, Prague)
- Copernicus for Raw Materials workshop (5 Sept 2016, Brussels)
- DG-RTD Research & Innovation workshop (21 Sept 2016, Brussels)
- DG-Grow H2020 workshop (26 Sept 2016, Brussels)
- ConnectinGEO and ENEON Workshops (10-13 Oct 2016, Luxembourg)
- Space Working Party (18 October 2016, Brussels)
- Big Data for Secure Societies (18 October 2016, Brussels)
- AARSE 2016 (25 October 2016, Kampala)
- RFI Workshop (25 October 2016, Frascati)
- GEO Plenary XIII (7 Nov 2016, St Petersburg)
- Industry contribution to SDGs (8 Nov 2016, St Petersburg)
- UNISPACE+50 High Level Forum (20-22 Nov 2016, Dubai)
- DG-Grow workshop on Internationalisation (22 Nov 2016, Brussels)
- BDVA Summit (29 Nov -2 Dec 2016, Valencia)
- EESC Hearing for Space Strategy (16 Jan 2017, Brussels)
- Boosting the market for EO services in the digital economy (25 January 2017, Brussels)
- EO Application for Sustainable Development in Africa (13-16 Feb 2017, Bremen)
- S-NET workshop on Satellite Data Platforms and Applications (15-16 Feb 2017, Tokyo)
- 38th GEO European HLWG (1 Mar 2017, Brussels)
- WorldCover 2017 Conference (14-16 Mar 2017, Frascati)
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 2016:
- EARSC views on a European Space Strategy (July 2016)
- EARSC Open Source Concept Paper (June 2016)
- EARSC Position Paper – Creating a European marketplace for EO services (February 2016)

ESA

On 14th January 2016 representatives of the Board met ESA DG, Jan Woerner to present detailed industry views on how ESA could 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. EARSC and PwC started a study in December 2016 looking to develop a roadmap for future activities with Copernicus Entrusted Entities (EEEs) and measures which can improve the industry exploitation of Copernicus Services. The final results will be available by June 2017. Furthermore, as the programme evolves, EARSC will prepare an opinion to provide the downstream services sector feedback on the evolution of Copernicus. A position paper will be issued later in 2017.

Space Strategy for Europe

The European Commission adopted a Space Strategy for Europe on 26 October 2016. This strategy outlines priorities for the European Union’s activities in space for the next 15 to 20 years. The main objective is to ensure that investments in space bring tangible benefits to the European citizens and enterprises. EARSC has participated to several consultation workshops throughout the year on the subject and issued a position paper in July 2016. In 2017, EARSC has been in contact with the European Economic and Social Committee and the European Parliament who are preparing their opinions in response to the Commission communication.

UNOSAA

EARSC Vice-Chairman, Giovanni Sylos Labini, presented at the First High Level Forum which was held in Dubai on 20-24 November 2016. He reported an increasing attention from UNOSAA to industrial cooperation. This event was organised jointly by the United Nations Office for Outer Space Affairs and the United Arab Emirates Space Agency.
EARSC Evolution

EARSC has taken its own office for the 1st time in 27 years. We share the premises with two other companies. You can now find us at 26, Rue de la Loi, 1040 Brussels. We look forward to welcoming members to the new EARSC Office! In addition, EARSC Secretariat team has enlarged. From left to right on the picture you can see Natassa Antoniou (Market Development), Emmanuel Pajot (Senior Project Manager), Monica Miguel Lago (Executive Secretary), Ariane Dubost (Communications) and Geoff Sawyer (Secretary General).

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. The MAEOS will be formed by a group of companies signing the MAEOS Charter. Our plan is to have the first version of eoMALL operational by end 2017.
- Continue to link with the European institutions; Copernicus policy, procurement and services including industrial participation, 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.
- Develop a business development strategy 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. Members will shortly be asked about their priorities and some trade stands will be planned in the coming months.
- Promote the wide range of capabilities of EO European industry notably through the industry survey 2016/2017, the Sentinels Benefits Study and our e-tools.