

EARSC Annual report 2014

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Chairman's message

Acknowledgements

I wish to take this opportunity to thank the Treasurer, the Vice-Chairman and indeed all Directors for their contribution to the Association. Without their time and support the Association would not function.

A very special acknowledgement goes to our Secretary General, Geoff Sawyer and Executive Secretary, Monica Miguel-Lago for the very valuable contribution they make through their drive, focus and efficiency as well as the imagination and creativity they bring to the job.

I also wanted to thank Deborah Sciocco who has worked with us for 9 months in 2014 and welcome Ariane Dubost-Bonnet who joined EARSC since January 2015.

Lastly, thanks to all members for their trust in the Association and for their support in making my job as Chairman possible.

Over the next 12 months I remain confident that EARSC will grow stronger, with a higher profile, greater recognition and a recognised opinion on key issues for our sector. As your chairman, I ask all of you to engage with and support the Association that can help all of us grow our business.

Market development

EARSC Tools

Website

Our new fully-featured website has been launched at the end of 2014 and offers more efficient access to the essential information on EARSC tools, resources and the members community.

Portal

Lots of changes took place in our portal over the last few months. We have opened new sections on our Portal such as "eoSCAN", where EARSC links business tendencies which may affect the EO market or Export center; which support activities of members addressing export markets. The Portal also hosts a "technology watch" section where new near-to-market products and services and new EO systems, sensors and platforms can be highlighted. We have also populated the Research Corner area of the EO Portal with a brief guide to the EU Horizon 2020 research programme from a perspective of suppliers and researchers in the domain of EO Geo-information Services.

Besides, we opened the portal to any professional interested in what EO can offer with access to the EO wiki and Research Corner.

EOpages

EOpages has been re-structured following the EARSC taxonomy and nomenclature. Information has been re-entered on each supplier, the products that they supply and examples of success stories where products have been used by customers.

In addition, we have produced an API for EOpages which will allow other organisations to use the EARSC database on EO suppliers. This development allow other users to easily access the supplier information and to integrate it into their own sites respecting their formats and look and feel.

Eomag

Eomag! is the EARSC newsletter. Latest issues since 2014

- Spring 2015 ([web](#))
- Winter 2014/2015 ([web](#))
- Autumn 2014 ([web](#))
- Summer 2014 ([web](#))
- Spring 2014 ([web](#))

Latest interviews featured

- Pierre Bahurel, Director General, Mercator Ocean
- Nicolaus Hanowski, Head Ground Segments and Operations under ESA's Earth Observation Programmes Directorate,
- 2014 EARSC Company Award winner, Christian Hoffmann, CEO GeoVille GmbH
- Eric Morel de Westgaver, Director of Industry, Procurement and Legal Affairs (D/IPL), ESA

- WooChong Um, Deputy Director General Regional and Sustainable Development Department, Asian Development Bank

Engagement with the oil and gas sector

The EO4OG workshop took place on 18th November 2014, at which the results of 4 ESA studies were presented to representatives of the oil EO4OG workshop and gas industry. The 230 challenges, 96 EO product sheets and 25 case studies as well as reports on the workshop and project results are available in a new dedicated section in the Portal which tends to be more information-centric than project oriented.

OGEOzine is the quarterly e-news for to share information between communities but specially bring news on how Earth Observation can be used in the Oil and Gas industry.

Export

EARSC develops a strategy to help support the industry in export markets. This year, efforts were concentrated on Japan. Geoff Sawyer joined the forum “Business partnership opportunities and technology transfer in Space sector between EU and Japan” organized by the EU – Japan Centre for Industrial Cooperation in December 2014. The forum led to a B2B meeting between Japanese and EU companies engaged in Space activities, which 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.

Industry survey

We repeated our industry survey in order to understand the complexity of the Earth Observation (EO) industry with a special focus on information which would display Copernicus' impact on the market. The core survey questionnaire was sent to all 500+ companies in Europe and Canada in our database and we got more than 160 responses. As in 2013, a full survey was conducted by telephone interview to address more strategic issues. We've already started to analyse the answers and preliminary results will be revealed at our AGM in June 2015.

As part of the update, in addition to the industry survey, we launched an international survey to have a global understanding of the industry and how it operates is important in order to take the right policy decisions.

Finally a dedicated questionnaire was also sent to Public institutions in Europe; generating or using geospatial information products; to develop a detailed understanding of how Copernicus will impact the sector and particularly levels of employment.

A comprehensive report will be published by end Q3 2015.

Copernicus Products Economic Value study

We have started working together with Marc de Vries (co-author with Geoff of the Geese and Golden Eggs report) on the first phase of work under the study into the economic value of products generated using EO satellite data and particularly that coming from the Copernicus Sentinel satellites. Three cases have been selected for further study and more information will be communicated as the project proceeds. Thanks to the EARSC members which have submitted ideas for consideration. The study will only permit us to cover 3 cases during which we shall develop and

test our methodology but if we are successful, then further cases can be expected to be studied in future. The study will be completed in 2015.

Participation to meetings & presentations

It is noteworthy also that our presence through EARSC staff and directors is increasingly being solicited at meetings. EARSC was present a numerous meetings last year and which will continue this year. Some extract could be found below:

- [Growth by Copernicus – ISRSE \(13 May 2015, Berlin\)](#)
- [EARSC presentation at the R&T workshop \(13 March 2015, Brussels\)](#)
- [EARSC presentation at European Parliament \(04 March 2015, Brussels\)](#)
- [EARSC at Legal Symposium \(Feb 2015, Munich\)](#)
- [TUSE Netherlands \(04Feb2015, The Hague\)](#)

- [EARSC — Construction sector \(14Oct2014, Netherlands\)](#)
- [EARSC presentation Lets embrace space \(16Sep2014, Rome\)](#)
- [Presentation Networking \(17Sep2014, Rome\)](#)
- [EARSC Award Geoville\(25Jun2014, Brussels\)](#)
- [EARSC-25th anniversary \(25Jun2014, Brussels\)](#)
- [EARSC Presentation at DigitalGlobe \(18Jun2014, London\)](#)
- [EARSC at AM FM GIS BELUX \(03Jun2014, Brussels\)](#)
- [GEOSS and Industry at Geospatial conference \(05May2014, Geneva\)](#)
- [Speech Han Wensink for EABF \(01Apr2014, Brussels\)](#)
- [OGP Petroleum Env. Research Forum \(PERF\)\(18Mar2014, London\)](#)
- [Ec Big Data \(13Mar2014, Brussels\)](#)
- [Space4you market development \(27Feb2014, Bari\)](#)
- [Meeting Japanese stakeholders \(18Feb2014, Tokyo\)](#)

Engagement with Unnamed aerial vehicles pace

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 2014 and 2015 RPAS yearbook.

- [Geospatial Services – Reaching out to New Markets \(Article for RPAS Yearbook UVS-info.com 2015\)](#)
- [Article for RPAS Yearbook-UAS paper \(May 2014\)](#)

Certification scheme

As you know, 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, as you may already be aware, EARSC has been coordinating an activity looking into the feasibility of a quality certification scheme based on ISO9001 for the Earth Observation Industry, including the conduct of a pilot study in 2014. After the pilot study, we consider the scheme complete and mature enough to initiate its implementation.

The scheme is applicable to all sizes of EO companies and allows the possibility of certification to scheme requirements without the need for full ISO9001 compliance. The scheme is intended as a “catalyst” for the maturation of the industry and will also assist in increasing confidence within the customer base.

The following documents have been released during the pilot activity.

1. Scheme Description
2. Management System Requirements
3. Self-Assessment Checklist
4. Document Requirements Definition for Product Specifications

The [EARSC Certification Scheme Home page](#) has been created at the portal and all information related has been stored.

Policy development

ESA

ESA has been in contact with EARSC for views on their new EO strategy (2015 to 2040) which they are putting to PB-EO. EARSC has provided written comments based on 3 strategic lines: 1) Include a direct responsibility / mandate to help grow the EO services sector. 2) Fully engage the downstream sector in the definition of future EO missions and programmes and 3) Help to create a mature market place with paying customers. ESA has confirmed that they will be able to reflect some of our detailed comments in its updated EO strategy document, and we would be pleased to engage further to elaborate on any of the points we have raised or provide further views on how they could be addressed. There was general agreement about the need to do more for our sector and Geospatial.

EARSC continues to discuss with ESA regarding the potential extension of the ESA mandate to support the downstream sector. For that purpose we have published several position papers over the last year.

[Members brief for members on ESA-IPC resolution to extend the ESA Mandate \(September 2014\)](#)

[Position paper on ESA downstream sector development \(April 2014\)](#)

European institutions:

Copernicus regulation

The [EARSC position paper on the procurement principles for Copernicus](#) has been issued and circulated to a wide range of stakeholders.

“Directive on the dissemination Earth observation satellite for commercial purposes”.

In July 2014, the European Commission published a proposal directive without proper consultation of the industry. EARSC had written to Philippe Brunet and had received a sharp reply.

The EU Council working group stopped the discussion and asked the EC for more information on the impact assessment. EC held a 2nd consultation in early December for which they had asked EARSC assistance and decided to go ahead with the legislation.

The Proposal for the Hi-Res Directive is now under review and discussion within Council and Parliament. An EARSC working group has been activated to develop industry views on the legislative process with inputs on specific aspects of the proposed Directive and certain of its articles. The European Parliament will hold a restricted hearing about the HiRes legislation; 2 committees are leading IMCO and ITRE. EARSC has participated in a restricted hearing organized by the Parliament. Some specific requests about the directive were raised: (i) Speed of authorization/ delay to dissemination: authorization procedures may take longer under specific circumstances, competent authorities should set-up procedures allowing for minimum delay for high-resolution EO data (ii) Resolution thresholds are too restrictive and may affect the competitiveness of EU industry in global markets (iii) Establishing joint criteria regarding the sensitivity of data dissemination. In this respect EARSC has sent the following letter ([EC Proposed Legislation for a Directive on Commercial High Resolution Satellite Data](#)) to members of Parliament.

Structured dialogue between the industry and EC

A formal exchange with the industry has long been called for by EARSC in order that the service sector views can be heard and taken into account for the design of future programmes.

The Structured Dialogue proposed by the European Commission to engage with the whole of the space industry includes the downstream sectors. A Memorandum of Understanding is planned to be signed by the EC (at Commissioner level) and the “space” trade associations. EARSC supports this process and looks forward to establishing a formal exchange with the EC representing the views of the downstream industry concerned with EO geospatial services.

Over the past few months, EARSC has expressed its view in several position papers ie : [Views on the H2020 space priorities for the 2016/2017 work programme \(September\)](#). EARSC has also been invited to present industry positions to the Space Advisory Group which meets on 15th October 2014. We have also been working with Eurospace to organise an industry meeting on March 13th 2015 to address the subject of priorities for the 2016/2017 space calls under H2020. Presentations in the morning included one from Eurospace and one from EARSC vice-chairman Chetan Pradhan on our views on priorities for this part of the work-programme.

GEO:

GEO has initiated actions to “engage with the private sector” and EARSC is actively contributing to this dialogue. EARSC has participated to several meetings in recent months and has invited Barbara Ryan, GEO Secretary Director for our 2015 January Board. We believe that GEO can be effective in coordinating, facilitating and fostering the efforts of the public sector organisations as well as private companies. A dialogue between the public and private sector is essential in order to tend to a win-win situation: GEO can play a key role in helping the industry to develop through raising awareness amongst its stakeholders. Industry can help GEO deliver its objectives to public stakeholders through co-ordinated actions

Position paper: [Views on GEO and the Private Sector \(May 2014\)](#)

Furthermore, 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.

EESC

EARSC is 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. A series of 6 events will be organised in Belgium, France, Germany, Italy, Lithuania and the Netherlands, this spring. Some of the themes selected are networking for SMES in space market, market development and policies. A final conference will be held on June 29th, 2015 to report on the local events and recommendations and explore future actions.

Internal affairs

25th Anniversary

The 1st EARSC Annual Meeting was held on 1st June 1989 in ESA HQ. On 25th June 2014, on the occasion of its Annual General Assembly, EARSC Members and invited guests celebrated the 25 years anniversary of the Founding of EARSC with a party held at The Comic Strip Museum in Brussels.

Over 80 guests were welcomed by Han Wensink, Chairman of EARSC, to enjoy an evening of music, good food and drink; and of course to mingle and exchange between member companies and Brussels-based policy makers.

During the evening, two important awards were made, a first in EARSC history. Christian Hoffman, founder and CEO of Geoville GmbH, was presented with the EARSC Company Achievement Award recognising Geoville as the Company to have made the most significant contribution to the development of the Earth Observation sector in Europe. A second award was made to Emile Maes (founder and CEO of Eurosense) for his lifetime contribution to the sector. Emile Maes was present at the First EARSC Meeting 25 Years Ago.

H2020

EARSC has supported a number of projects being submitted under H2020 and has provided inputs linked to communications, the industrial perspective, business planning, certification as well as networking activities. We are supported in this by Lefteris Mamais who is working for EARSC in this area.

New members since 2014:

- ACRI-ST
- BHO Legal
- C-S
- CloudEO

- EOmap
- Fugro GEOS
- Geocento
- Globesar
- Hermess
- Hisdesat
- NLR
- Ocean Space Consult
- Pixalytics
- Proteus
- RSICS
- Satellite Applications Catapult
- Spatial Energy
- Stevenson Astrosat
- TerraNIS

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 regularly contact between secretariat and Board of Directors. EARSC focuses on the governance and policies of the Association, on the working groups and opportunities on external events for active member participation.

Position	Name	Company
Chairman	Han Wensink	OceanSpaceConsult
Vice-Chairman	Chetan Pradhan	CGI
Treasurer	Celestino Gomez	GMV
Director	Christian Hoffmann	Geoville Group
Director	Nöel Parmentier	Rhea Group
Director	Massimiliano Vitale	Blackbridge
Director	Giovanni Sylos Labini	Planetek
Director	Francis Vanderhaeghen	VITO

Director	Kamen Iliev	TAKT IKI OOD
Director	Marcello Maranesi	e-geos
Director	Vark Helfritz	Airbus Defense and Space
Co-Opted Director	Markus Probeck	GAF AG

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:

- 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.
- As you know we have started a number of discussions with agencies responsible for the delivery of Copernicus services and are optimistic that this can lead to some long term planning and realistic partnerships.
- Look further develop the EO Portal with other communities and enhance the EO Portal as the main channel for members to access information concerning EARSC and the industry sector.
- EARSC plans to help support the industry increase company business in export markets as well as engagement with other market sectors
- Maintain and develop the industry survey and our knowledge of what is needed to help you develop your business
- Promote the wide range of capabilities of EO European industry

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. In 2014, the revenue of the European EO services sector is estimated to be around €900m and giving work to over 7000 highly skilled employees. The industry is growing at over 10% per annum.

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 with deeply interest 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.

Profile	Employees in EO and geo-information	Yearly fees in 2015
Small, new companies formed in last five years	5 or less employees	1st year €250 / 2nd year €500 / 3rd year €825
Small companies	<10 employees	€825
Medium Companies	11-50 employees	€1.650
Large Companies	>51 employees	€2.750
Observers		€1.100

[Info on Membership rights \(ref.services\)](#)

If you want to join the network please follow the [link](#).

Contact

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