In 2024, EARSC celebrated the 35th anniversary of the association, 5 years of EXPANDEO, and 4 years of EOcafe with 30 guest speakers and 2948 registrations.

On the 13th and 14th of June 2023, EARSC held its annual event, EXPANDEO as a successful two-day event with 10 panels, 50 speakers, and more than 600 participants.

EARSC published 10 statements and letters in response to the Commission’s Open Consultation process.

EARSC signed a Memorandum of Understanding with the Réseau des Professionnels Africains de la Géomatique (RPAG). This partnership aims to foster collaboration between Africa and Europe, focusing on information exchange, cross-promotion, joint events, and collaborative research. Beneficiaries include organizations and companies from both continents, leveraging shared best practices, expertise, and technologies to advance EO services in line with Sustainable Development Goals.
Chairman's message

I am pleased and honoured to present this report for the last year of my current mandate as Chairman, covering the activities of EARSC from June 2023 to the present.

Over the past 12 months, the association has strengthened its role as the voice of the European Earth Observation downstream industry. It engages with institutions and partners to facilitate the collection and sharing of views, particularly in the policy arena and through liaison with user communities. Promoting EO in European policy applications and user engagement have been the cornerstone of our activities in 2023.

Reflecting our dynamism, the association saw an increase in membership, reaching 136 members as of January 24. With representation from nearly every European country, we are well-positioned to track the industry’s evolution, gaining insights from regions where the EO industry is either emerging or rapidly expanding. EARSC has also strengthened its presence at events organised in member states, supporting actions initiated by European institutions, ESA, and national bodies.

A Fast-Changing and Growing Industry

Our industry survey, published in 2023, confirmed post-COVID growth assumptions, showing increases in the number of companies (+3.5%), employees (+14.2 % %), and revenues (+10.9%). This underscores our industry’s capability to deliver data and solutions that meet users’ growing needs.

A Hub for Networking and Exchange

EXPANDEO, our annual free hybrid event, continues to be a key platform for members to network and engage with institutions, ESA, and user representatives. The 2023 edition was particularly successful, with 655 attendees from 401 entities across 68 countries. I extend my gratitude to all sponsors and partners who made this possible.

Supporting Policymakers

Through active participation in Working Groups, EARSC has ensured that EO Copernicus and commercial data and value-added services are recognised as reliable solutions in EC strategies and future policies. The Secretariat has consistently provided the European Commission and European Parliament with consultation responses and service booklets and organised meetings with DGs, involving these stakeholders in workshops. EARSC also contributed to the future EU Space Law draft and participated in workshops organised by the JRC as part of the Knowledge Center of Earth Observation.
Bridging with Communities

Our policy activities and funded projects have strengthened connections with user communities. The Secretariat has promoted EO-based solutions to potential users impacted by policy changes under the European Green Deal, encouraging their adoption. EARSC supported members in implementing new ESA best practices by sharing knowledge on the EARSC portal and organising EOcafe sessions to disseminate findings. Collaboration with Entrusted Entities, particularly ECMWF, has been reinforced to enhance the uptake of solutions they offer and improve private sector engagement. In April, EUSPA hosted the EARSC Board of Directors, where discussions focused on further supporting our industry and improving information dissemination.

Expanding Globally

EARSC has deepened its relationship with DG-INTPA to develop partnerships in Latin America, Africa, and Asia, supporting EC trade missions that connect members with international public and private entities. Our involvement with GEO and the UN has promoted European capabilities on a global scale, advocating for increased private-sector participation and supporting the EuroGEO Secretariat.

Finally, in compliance with Belgian law, EARSC updated its statutes to include two additional directors on the board, offering more opportunities to full members.

In conclusion, I would like to thank the directors who contributed to these results, particularly those who chose not to reapply for their dedication, allowing space for new members. The proposed board brings diverse representation, with directors from various enterprises and countries across the value chain. My only regret is the gender imbalance, with only two females among the 14 directors. EARSC is your association. I encourage all members to engage with the Secretariat, seize opportunities shared via Confluence and monthly reports, and participate in working groups to help advance our EO downstream business.

Thank you for your continuous support.

Marc Tondriaux
EARSC Chairman
**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. These companies are global leaders in the provision of EO services and our members are at the forefront of this industry.

**EARSC Membership**

EARSC has 134 members from 24 European countries and 1 non-European country. For companies, the annual membership fees are a cost-effective way to stay informed about the latest policy developments, promote their companies, engage with political and institutional representatives, increase networking opportunities with other industry players, and help to support the future of the geo-information industry. EARSC has both full and observer members to cover all entities active in the geo-information sector. Joining EARSC gives companies a platform to express their views on relevant topics, influence European policies, and set industry standards.

**Full members** shall be:
- Any commercial company providing services, including consultancy or supplying equipment in the field of remote sensing.
- Based in a European country, which is a member of the European Union, or which contributes to the European Space Agency.

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

**EARSC Membership schemes**

<table>
<thead>
<tr>
<th>Profile</th>
<th>Employees in EO and GI</th>
<th>Yearly fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trial*</td>
<td>Less than 11 employees</td>
<td>6 months free</td>
</tr>
<tr>
<td>Small companies</td>
<td>Less than 11 employees</td>
<td>€900</td>
</tr>
<tr>
<td>Medium companies</td>
<td>11-50 employees</td>
<td>€1,800</td>
</tr>
<tr>
<td>Large companies</td>
<td>More than 51 employees</td>
<td>€3,000</td>
</tr>
<tr>
<td>Observers</td>
<td></td>
<td>€1,200</td>
</tr>
</tbody>
</table>

**Trial Membership**

EARSC has always been dedicated to supporting the growth of startups through various projects and events. Since 2019, the Association established a free trial membership scheme that enabled us to build better connections with small companies. Trial members can get access to all EARSC’s resources for free for 6 months to understand the value of becoming an EARSC member.

**New members in 2023-2024**

**FULL**
- GHG SAT (UK)
- Quantum Software (Poland)
- Disaitek (France)
- Evenflow (Belgium)
- Constellr (Germany)
- Spire Global (Luxembourg)
- vorteX-io (France)

**TRIAL**
- Spaceside OÜ (Latvia)
- WASDI Space (Luxembourg)
- Green Orbit Digital (UK)
- NGIS EU (Ireland)

**OBSERVER**
- Space Shift Co., Ltd. (Japan)
 Governance

EARSC affairs are overseen by a Board of Directors elected by its members which guides our policymaking, and by an Executive secretariat which executes the daily activities regarding the administration of the Association.

Secretariat

The Executive secretariat is composed of 8 full-time staff which operates partly from EARSC premises in Brussels. The EARSC secretariat’s activities include operations management and governance, membership care, programme management, communications, policy analysis, event planning, tender preparation, and market development through market support and internationalisation. Much of the activity is delivered through projects which are mostly won competitively.

Board of Directors

Oversight of the actions of the secretariat and the activities of the Association is provided by the EARSC Board of Directors (BoD). The BoD meets quarterly to progress EARSC business and to review the service it is providing to EARSC Members. Every two years new directors can be nominated by members on the occasion of the General Assembly.

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman</td>
<td>Marc Tondriaux</td>
<td>Terranis</td>
</tr>
<tr>
<td>Vice-Chairman</td>
<td>Giovanni Sylos Labini</td>
<td>Planetek Italia</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Celestino Gómez</td>
<td>GMV</td>
</tr>
<tr>
<td>Director</td>
<td>Arne Matthyssen</td>
<td>RHEA Group</td>
</tr>
<tr>
<td>Director</td>
<td>Betty Charalampopoulou</td>
<td>Geosystems Hellas</td>
</tr>
<tr>
<td>Director</td>
<td>Charlotte O’Kelly</td>
<td>Techworks Marine</td>
</tr>
<tr>
<td>Director</td>
<td>Fabio Volpe</td>
<td>e-geos</td>
</tr>
<tr>
<td>Director</td>
<td>Francisco Vilhena da Cunha</td>
<td>GEOSAT</td>
</tr>
<tr>
<td>Director</td>
<td>Markus Probeck</td>
<td>GAF</td>
</tr>
<tr>
<td>Director</td>
<td>Monika Krzyżanowska</td>
<td>CloudFerro</td>
</tr>
<tr>
<td>Director</td>
<td>Pierre-Alain Bosc</td>
<td>AIRBUS</td>
</tr>
<tr>
<td>Director</td>
<td>Tero Vauraste</td>
<td>ICEYE</td>
</tr>
<tr>
<td>Expert advisor</td>
<td>Geoff Sawyer</td>
<td>Independent</td>
</tr>
<tr>
<td>Expert advisor</td>
<td>Marcello Maranesi</td>
<td>Independent</td>
</tr>
</tbody>
</table>

Financial Situation

EARSC is based on a mixed business model of membership fees and projects covered by grants. We wish to see members’ revenues grow to balance the uncertain nature of projects and their natural life circle. Large projects (FIRE, e-shape) ended in the first semester of 2023, and new ones started in the last weeks of the year, with revenues in early 2024. Consequently, “Contracts and Grants” and the “Secretariat” cost were reduced in 2023.

<table>
<thead>
<tr>
<th>RESULTS (k€)</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>826,6</td>
<td>937,2</td>
</tr>
<tr>
<td>Fees</td>
<td>174,1</td>
<td>154,7</td>
</tr>
<tr>
<td>Contracts &amp; Grants</td>
<td>652,4</td>
<td>782,6</td>
</tr>
<tr>
<td>Other Income</td>
<td>0,0</td>
<td></td>
</tr>
<tr>
<td>Expenditures</td>
<td>812,8</td>
<td>924,7</td>
</tr>
<tr>
<td>Secretariat</td>
<td>560,6</td>
<td>655,8</td>
</tr>
<tr>
<td>Office and other cost</td>
<td>89,5</td>
<td>81,3</td>
</tr>
<tr>
<td>Project Costs</td>
<td>141,9</td>
<td>173,0</td>
</tr>
<tr>
<td>Audit &amp; Accounting</td>
<td>20,6</td>
<td>14,6</td>
</tr>
<tr>
<td>Net Result</td>
<td>13,8</td>
<td>12,5</td>
</tr>
<tr>
<td>End of Year Reserves</td>
<td>208,2</td>
<td>194,4</td>
</tr>
</tbody>
</table>
Policy Observatory

The policy observatory encourages and supports the use of Earth Observation for EU policymaking and seeks to ensure that policy recognizes its important role. The EARSC Policy Observatory is monitoring all relevant policies for the European EO services industry. EARSC’s engagement with the policy sphere to raise awareness on the benefits of EO data and services includes many activities:

- **Statements:** In response to specific legislative initiatives, from June 2023 to March 2024, EARSC has published seven statements, including through the European Commission’s “Have Your Say” portal, and regarding actions by the Committee of the Regions. Topics covered include resilient water management, forest monitoring, green data access, and more.

- **Position Papers:** In response to the EU’s actions in line with the strengthening of its security and defence policies, EARSC produced a position paper to reinforce the voice of the European EO data and services industry, aiming to ensure that EU activities leverage EO services industry capabilities and consolidate relationships with relevant stakeholders.

- **Letters:** EARSC has produced letters responding to the European Commission’s Mid-Term Review of the EU Space Programme, as well as to the European Commission’s proposal on new rules for safe, resilient, and sustainable space activities, also known as the EU Space Law. EARSC also issued a letter regarding the protection of X-band frequencies for Earth Observation use.

- **Technological Feasibility Assessments:** EARSC has issued an updated technical document on the proposal for a regulation on the reduction of methane emissions in the energy sector, as well as an example catalogue of services for local and regional authorities. Technical documents are critical for the sector to address challenges in policy and showcase the potential of EO technologies to contribute to meeting policy needs.

The activities of the policy observatory require a continuous dialogue with various stakeholders including the European Parliament, the Council of the EU, the European Commission, and other relevant actors, depending on the policy area, as well as engagement with other associations, private companies, and NGOs, among other stakeholders. Most of these actions are coordinated at the level of EARSC working groups which are instrumental in gathering the knowledge and expertise of our members.

- **Green Deal Working Group:** the overarching purpose of the working group is to advocate for the increased use of EO for the European Green Deal, encouraging the EU to codify the role of EO in policy, through statements, position papers, and showcase. EARSC ensures that the EU institutions are aware of how EO can contribute to Green Deal implementation. Working Group members have been working in three key policy areas:

  - **Methane Monitoring:** following the Proposal for a Regulation on Methane Emissions Reduction in the Energy Sector.
  - **Carbon Removals:** following the Proposal for a Regulation on Establishing a Union Certification Framework for Carbon Removals, and its future implementation, as well as the Proposal for a Directive on Soil Monitoring and Resilience (Soil Monitoring Law).
  - **Forest Management:** following the implementation of the Regulation on Deforestation-Free Products, and the Proposal for a new EU Framework for Forest Monitoring and Strategic Plans (Forest Monitoring Law).
**EARSC Studies**

**EARSC Industry Survey**

In 2023 EARSC published its 8th Survey on the State & Health of the EO services industry. The Study is the result of direct research on over 700 companies. You can find previous reports on our website.

| **772** | **13796** | **€ 1.79b** | **7.5% Growth rate**
| EO Companies | Employees | Revenues | over the last 5 years |
| Up from 746 (+3.5%) year on year | Up from 12085 (+14.2%) year on year | Up from €1.6b (+10.9%) year on year |

**Sentinel Benefits Study (SeBS)**

Through a series of economic impact studies, EARSC aims to analyse and showcase the quantitative and qualitative benefits that Copernicus Sentinel data deliver to various (emerging) markets. These analyses are based on a methodology that traces the impact of using an EO product or service along a value chain. These case studies illustrate the impact and benefits of Copernicus data in the following 6 dimensions: Economic, Regulatory, Science & Technology, Environmental, Entrepreneurship & Innovation, Societal.

Over the past year, we have published the long case studies on Water Quality Management in the Netherlands and Invasive Species Detection in Croatia, as well as Irrigation Detection & Mapping in Austria, and Ground Motion Intelligence in Romania. These and our previous case studies help us to promote the benefits of EO and the Copernicus programme to European institutional stakeholders as well as private sector organisations from a wide range of markets. An interactive summary highlights the various findings of the SEBS analyses here and reports from the Final Transversal Workshops 2024 will be available here.

While SeBS is slowly drawing to a close by mid-2024, all key results and case studies will remain accessible at www.earsc.org/sebs.

**EARSC in ESA’s Best Practice Projects EO4BAS & EO-FIN**

EARSC continued to support two other ESA Best Practice projects in support of Baltic and Arctic shipping and financial management. The Best Practice projects analyse the challenges and geo-information needs of the user market and, assess which EO products and services are (already) able to meet the needs and where capability gaps still exist. A mock-up application has been developed to demonstrate in practice how EO can help the sector, and a roadmap has been created to illustrate how the uptake of EO in the user market can be accelerated. EARSC has supported the projects through the EOwiki websites and our communication and dissemination channels, while the projects have enabled us to engage with new user communities. All analyses and findings from the Best Practice projects are openly available on EOwiki here. In the last year four further ESA Best Practice projects that we are supporting have started. They focus on Earth observation in support of ports, road and rail, solar energy, and wind energy. The websites including analyses and findings will go live in the course of 2024 and early 2025.
Tools for Promoting the Industry

LinkedIn
The LinkedIn presence of EARSC grew consistently and significantly in the current year, reaching a milestone of over 5000 followers. This number marks a significant increase from the previous year’s count of 4000. We have continued to run impactful social media campaigns that promote our EOcafes, the latest news and job vacancies from our members, and the recent activities of the secretariat. Additionally, we have been welcoming new members to our platform.

X
EARSC’s X profile has gained 330 new followers this year, reaching a total of 6480 followers compared to 6150 in 2023. EARSC has remained committed to connecting with the EO community, welcoming new members and reaching out to partners and stakeholders through this main EARSC social media network.

YouTube
Throughout 2023, we continued to populate our YouTube channel, which has received a warm welcome from our members and the EO community. This year, our channel received 4.3K views and 250 subscribers. We continue to use this platform to publish recordings of our EOcafes online, which have been viewed by more than 4,000 people in the past year.

eoPAGES.eu
eoPAGES serves as a brokerage platform, connecting interested buyers with suppliers and allowing service providers to showcase their offerings. eoPAGES is a comprehensive tool designed specifically to organize, categorize, and present these offerings in an accessible manner.

The website is business-focused, promoting the European geoinformation service industry and providing a hub for industry players and customers to interact and engage with competencies and consultancy services. With a clear “1 product = 1 customer” focus, eoPAGES is an active space for professional connections and transactions.

eoMALL.eu
eoMALL is an online platform that allows users to access referenced and qualified companies and their products/services through various search tools based on themes, market sectors, and geographical areas. Additionally, eoMALL provides market information by analyzing visitors’ profiles to assist partners with their market research and product development.

The platform focuses on online services that can reach multiple customers through one product. EARSC engages all the companies it is in contact within projects and other activities by including their products in eoMALL. In the e-shape project context, EOmall supports the research to business activities within EuroGEO, supporting the 37 pilots EO solutions into new markets and community of users fostering the uptake and provider-user connection.
EO for the Green Deal and Sustainable Development Agendas

EARSC is involved in several projects to promote the industry views and connect with user communities relevant for our members.

Leveraging Copernicus data to drive sustainable development in Europe and beyond

Employing a pilot-driven approach, SDGs-EYES demonstrates solutions across SDG indicators related to Climate Action, Life Below Water, and Life on Land, and across regions with the objective of improving EO data accessibility and reliability and advancing stakeholder capacity in SDG monitoring. SDGs-EYES is co-designing data products to simplify SDG tracking and reporting. EARSC is leading the stakeholder’s engagement in the EU-funded SDGs-EYES project which boosts the European capacity for monitoring the Sustainable Development Goals (SDGs) based on the Copernicus programme.

Building momentum and trust to achieve credible soil carbon farming in the EU

The main goal of Project CREDIBLE is to build momentum and trust for the implementation of carbon farming in the EU. This will be primarily achieved by setting up and moderating a network of initiatives/projects/stakeholders, for favouring transparency, environmental integrity, and methodology standardisation in soil carbon accounting. EARSC took a proactive role by supporting the organization of the 1st European Carbon Farming Summit, facilitating discussions on carbon farming markets, policies, and the role of Earth observation in the Monitoring, Reporting, and Verification (MRV) of carbon removals. EARSC is leading this activity and providing direct recommendations to the EC on the CRCF implementation.

GREAT

To ensure Europe’s global competitiveness and data sovereignty, the European Digital Strategy aims at creating a single market for data. This will be achieved through the development of Common European Data Spaces addressing key sectors for the European market like agriculture, energy, health, and Green Deal. The GREAT project was a Coordination and Support Action (CSA), launched along other sector-specific data space CSAs, serving as a foundation for the Green Deal Data Space.

Throughout the project, EARSC involved members of the association and the broad Earth observation sector in consultations, workshops, events, and overall gathering of the sector’s needs and requirements. The received feedback served as a pillar to define the technical blueprint, governance, and business models of the Green Deal Data Space, to prioritize datasets and to shape the implementation roadmap. In total, more than 600 entities contributed to the project, with 42% of them coming from the private sector, guaranteeing their impact on the final outcome of the project. Thank you to all members and stakeholders from the EARSC network contributing to the project, your input shaped the future Green Deal Data Space.

The project finished in April 2024 with a final event held in Brussels and publication of Green Deal Data Space implementation roadmap (see the roadmap and all GREAT deliverables here). In the upcoming months the Green Deal Data Space and other sectoral data spaces will start their deployment phase.
EO 4 Regions and Cities

The public sector at both the national and European levels remains the main customer of the EO industry constituting 60% of the market share, while local and regional users constitute only 6% of the share (as per Industry Survey 2023). However, with the growing importance of climate adaptation, regions and local authorities are turning to EO-based services to guarantee compliance with legislation, benefit from cost-efficient technology, more informed decision-making processes, and efficient everyday work benefiting society at the local and regional levels. Therefore, the connection with networks of local and regional authorities is key for the Earth observation sector and EARSC to raise awareness about EO-enabled potential to tackle the users’ challenges.

HARMONIA

The HARMONIA project will provide a resilience assessment platform powered by Earth observation to help urban stakeholders understand and quantify climate change effects and select the right mitigation measures. Throughout the process of designing the tool and its implementation, four European cities were involved to share their needs and shape together the developed solutions. Reaching its final year, HARMONIA provided numerous opportunities for the EO sector to get to know the perspective of European cities, their needs and faced challenges through workshops, discussion panels at events, and communication materials prepared by the project. EARSC is in charge of the communication and dissemination activities and contributes to the user and stakeholders groups identification and collection of their requirements.

OCEANIDS

The OCEANIDS project kicked off in December 2023, leading the way towards Climate-Informed Maritime Spatial Planning and integrated seascape management. With the support of 12 regional and local authorities involved in the project, OCEANIDS will identify the gaps between the current EO offer and the needs expressed by the users. The project is calling on the EARSC community to share their services targeting coastal areas and climate change to raise awareness among the vast network of local and regional authorities. Tools developed in the project will benefit from and promote access to already existing services to fully enhance the Earth observation potential. In the project, EARSC is responsible for identifying gaps between users’ needs and the EO offer and reviewing relevant policies related to Blue Economy and coastal areas which might be supported by the Earth observation.

VALORADA

Launched in June 2023, VALORADA aims to empower European regions and cities to steer the coming societal transformation towards sustainable and climate-resilient development. VALORADA is in line with the EU’s Adaptation Mission, which aims to support the transformation of 150 European regions into sustainable and climate-resilient ones by 2030. It helps cities and regions to use (non-)climate data, including Earth observation data, to support climate adaptation processes. The first year laid the groundwork by gathering user requirements, understanding local and regional contexts and data ecosystems, and informing the subsequent development and delivery of tools to city and regional authorities. Workshops were organised in cooperation with the regions of Molise, Occitanie, Central Greece and the municipalities of Burgas/Gabrovo and Mladá Boleslav/Přerov. EARSC has supported the project in the initial user requirements and data ecosystems analysis and is leading the dissemination activities.
Internationalisation

This year EARSC continued to be involved with the Global Action on Space, the European Commission’s programme promoting the uptake of the EU space programme and fostering EU and non-EU private partnerships. EARSC and member companies actively contributed and took part in two trade visits with international and regional stakeholders, liaising with the Global Action on Space team from the inception of the trade visits to ensure that the members and the EO industry’s interests were reflected and passed on. In total, 12 members took part in these trade visits, allowing them to directly engage with the stakeholders to present their services and business solutions.

Working with partners

- EARSC contributed to the UN CODES community of practice and joined the Private Sector Advisory Group at the Digital for Development (D4D) Hub, promoting dialogue and collaboration in digital and environmental sustainability. EARSC’s participation in UN-GGIM Europe’s events underscores the importance of Earth Observations in achieving SDGs. The association advocates for using EO data to monitor environmental changes, inform decision-making, and promote sustainable development worldwide. In this framework, EARSC proposed to advance the use of EO in the framework of future SDGs indicators.

- Within GEO, EARSC advocates for strengthening ties with the private sector, recognizing the industry’s significance in achieving GEO’s goal of providing Earth Intelligence. EARSC showcased the involvement of the European private sector in the development of methodologies such as the EO Maturity Indicator and the benefits assessment. Our presence in GEO highlights the ability of public-private partnerships in leveraging Earth observation to drive informed decisions, positioning EARSC as a key strategic ally in promoting international collaboration.

- Our participation in the GMES & Africa Forum, reinforced our engagement with RPAG Africa for collaboration in 2024, demonstrating EARSC commitment to fostering international partnerships.

- EARSC and DG-INTPA worked together to enable member integration into initiatives like the EU-LAC Digital Accelerator. Additionally, we committed to annually presenting our activities in collaboration with Copernicus-LAC.

- EARSC organised a meeting with WWF-IT to address biodiversity challenges, aiming to bridge EO service capabilities into NGO initiatives and identifying and quantifying areas contributing to biodiversity protection. EARSC supported WWF in identifying EO service providers that may help with their challenges.

- EARSC held two meetings with the CEPF (Confederation of European Forest Owners) to discuss the role of Earth Observation in forest monitoring, and how the EO industry could support them in the context of the EU Deforestation-Free Products Regulation (EUDR) and the upcoming Forest Monitoring Law, both with the CEPF members to discuss questions and concerns and with the CEPF secretariat to discuss potential collaboration going forward.

- Other engagements in the context of the Forest Management Working Group include with the Environmental Coalition on Standards (ECOS), IKEA Public Affairs, and other stakeholders. These discussions are mainly focused on sharing viewpoints on upcoming legislation and to discuss how different actors and sectors foresee the implementation.

- In the context of the EARSC Carbon Removals and Forest Management Working Groups, EARSC has begun to initiate engagement with Verra to discuss the role of EO for the Monitoring, Reporting, and Verification of Carbon Removals. In the context of the CRCF, these ongoing interactions will be of utmost importance.

- In the context of the EARSC Methane Monitoring Working Group, meetings with International Association of Oil & Gas Producers (IOGP) and Uniper were organised to discuss alignment on the content of the regulation and concerns on implementation.
Research to Business

The EuroGEO Initiative was launched by the European Commission in 2017 and provides a regional framework to promote coordination and cooperation among the members of the European GEO Caucus and promote European capabilities in GEO. The EuroGEOSec project, started in December 2023, is preparing the transition of the EuroGEO initiative into a sustainable endeavour, by setting-up the EuroGEO Secretariat with the mission to strengthen GEO-related coordination mechanisms at European and national levels, foster international cooperation to help stimulate the market and promote European technology and services.

The EuroGEO Secretariat will serve as an engagement platform to structure the EuroGEO ecosystem. It will coordinate, support and facilitate the smooth implementation and integration of EuroGEO initiative activities and Action groups. It will also deliver an evidence-based framework that supports the prioritization of research funding in Europe, support the planning, execution, and monitoring of the EuroGEO implementation plan, and contribute to the GEO strategic plan. It will also assist in the development of a sustainability concept to ensure the long-term operation of the EuroGEO initiative.

In the context of the EuroGEOSec project, EARSC is paving the way for the EO industry’s engagement within the EuroGEO Secretariat. It aims to strengthen the involvement of the EO industry and private sector in the research to business landscape.

To make sure that the EO industry is an essential component, in the first months of the project EARSC has launched the EuroGEO Secretariat Survey to map the presence of the EO industry across the EuroGEO workshops in order to maximise their presence, organised the “Upcoming workshop on the involvement of the EO industry sector in EuroGEO” advancing the engagement with the EO industry sector and how it can be involved at project and governance level, and as well kicked off the liaison with the European Entrusted Entities to explore further integration and cooperation. The project will end in 2025 with an initial EuroGEO governance roadmap.

Skills & Workforce

SPACE4GEO Alliance, a Large-Scale Skills Partnership (LSP) endorsed by the European Commission’s Pact for Skills, focuses on equipping workers with skills vital for future innovations and EU Space strategy objectives. EARSC, as a partner, contributes to identifying skills requirements and tackling challenges and skill shortages. The partnership aims to cultivate a proficient workforce capable of leveraging space applications in various aspects of daily life, driving innovation forward. Collaboration among academia, private, and public sectors is central to addressing skill development needs.

EARSC acknowledges the sector’s skills gap and addresses it through initiatives like the SpaceSUITE project promoted within the SPACE4GEO Large-scale Skills Partnership. This project aims to bridge the gap, foster collaboration, and exchange knowledge, addressing skills shortages in the downstream space sector with innovative education and training resources. EARSC provides the industry views on this initiative to address the skills gap.
Events

The EXPANDEO 2023 took place on the 13th and 14th of June 2023 at the Museum of Natural Sciences in Brussels and online. Key representatives from user communities, Earth Observation service providers, and institutional actors attended this two-day event to discuss how Earth observation can support policy-making decisions and implementation with reliable and actionable information based on satellite data.

The event featured two intensive days with 10 panels, uniting 50 speakers and moderators to discuss a diverse range of cross-cutting topics such as research and development trends, policy, capacity building, market development, and the technological infrastructure enabling EO.

In total, the event reached 655 attendees that either work in the EO industry, are institutional stakeholders, or are affiliated with the Earth observation sector. At the end of the first day of EXPANDEO, EARSC held its EARSC Awards 2023 ceremony, where the winners: CloudFerro (Company award), “Hyperspectral Fire Hazard Map” by e-geos (Product award), and Constellr (Start-up award) were announced in three categories at the Museum of Natural Sciences in Brussels followed by a reception and a networking session.

EOcafe

April 2024 marked four years of the EOcafe. Initially started as a way for the EO community to keep in touch as the pandemic hit in 2020, it has now become a staple of the European EO community’s agenda. By the end of May 2024, we will have reached 80 EOcafes! This year, we organised 20 EOcafes, with 30 speakers and over 2760 registrations.

The EOcafe continues to be a resounding success and is much appreciated by the EO community. With its informal format and wide range of topics covered, it allows both the invited guests and attendees to engage in lively exchanges on the latest news and developments relevant to the whole EO community.

Over the last year, we have had the pleasure of welcoming guest speakers from European institutions (European Commission, Presidency of the Council of the EU, EUSPA), international organisations (ESA, UN, AUC), public bodies (Mercator Ocean International), associations (AARSE, RPAG, Secure World Foundation) and private companies. The topics covered were just as diverse, ranging from legal and policy developments (e.g., the Spanish and Belgian presidencies, the AI Act, the EUDR and more), data and technological developments (e.g., IRIDE, Data Spaces), to skills and employment, funding opportunities, international partnerships (Africa and LAC) and many more. The most popular EOcafe was “The Impact of AI on the EO Sector. A force for good or bad?”.

The EOcafe will continue to be one of the main tools for EARSC to engage with key stakeholders and be a forum for the community to voice their opinions and network. All EOcafes are recorded and can be found on the EARSC YouTube channel.

If you are reading this and would like to suggest a topic for an upcoming EOcafe, please feel free to contact tanya.walker@earsc.org.
Focus 2023-2024

EARSC Secretariat

The EARSC Secretariat is dedicated to supporting the rapid growth of the EO industry by addressing its needs. We would like to take the opportunity to thank each of them for their commitment to our sector.

- Emmanuel Pajot, Secretary General
- Monica Miguel-Lago, Senior Project Manager
- Tanya Walker, Market Development Officer
- Christopher Oligschläger, Market Analyst
- Michelle Hermes, Policy Officer
- Weronika Borejko, Project Manager
- Francesca Piatto, Project Manager
- Francesco Casaril, Communications Officer
- Geoff Sawyer, Strategic Adviser
- Natassa Antoniou, Project Officer (Until October 2023)
- Delphine Miramont, Policy Officer (until September 2023)

Future Activities:

Representing the Members

As a membership association, our goal is to establish a consolidated dialogue and collaboration between European Institutions, Copernicus Entrusted Entities, GEO, ESA, EUSPA, and the European Earth Observation Downstream Industry to ensure industrial competitiveness. We aim to integrate EO into the European policies that support the Green and Digital strategies.

Market Development and Internationalisation

Our focus is on market development and internationalisation, and we assist the industry in accessing new international markets through trade missions organized by the European Commission. We also work towards more involvement in the United Nations divisions (UNGGIM, UNEP), and the Group of Earth Observations. We strive to develop further links to international partners and other commercial sectors.

Showcasing the Benefits of EO

Our aim is to showcase the benefits of EO, which we achieve through the Industry Survey, the Sentinel Benefits Studies, and the eoWIKI. We promote the wide range of capabilities of the European EO industry and encourage the research to business approach. We also foster the creation of new EO services by linking with many institutional bodies and user communities. We make use of EARSC involvement in projects and the EO4GEO Alliance to bridge the gap between academia and the private sector and develop synergies.

Tools for Promoting the Industry

The Secretariat has the right tools to promote the EO industry, including eoPAGES and eoMALL. These tools provide visibility and opportunities for the European industry and other business sectors.
Our members