



# EARSC

European Association  
of Remote Sensing  
Companies

## **EARSC: EU Industry and GEO**

**Geoff Sawyer: EARSC Secretary General**



# What is EARSC?

EARSC is a trade association (non-profit Belgian company), founded in 1989, which represents European EO companies covering the full value chain from data to information and including infrastructure.

Our focus is on remote sensing from space-based platforms (satellites) but we also have members which are aircraft and RPAS operators.

Our mission is:

- to foster the development of the European Geo-Information Service Industry
- to represent European geo-information providers, creating a sustainable network between industry, decision makers and users

# Network

67 full members, 9 observers

Members:

commercial company engaged in the supply or use of Remote Sensing

based in a European country which contributes to the European Space Agency or which is a member of the European Union

Observer:

any organisation which does not qualify to become a full member of the Association





# What do we do?

- Knowledge of the sector and the industry in Europe and globally
  - Industry survey
- Promotion of the industry
  - Eopages (Marketplace/brokerage site),
  - Certification scheme for companies
- Raise awareness
  - Community links: eg Oil&Gas through OGEO and EO4OG
  - Economic assessment of the sector capabilities
- Links to institutional stakeholders
  - Copernicus (services exploitation, FODP etc)
  - GEO (private sector engagement, European hub)

# EARSC EO Services Industry Survey

2013

eo

A Survey  
Health  
Service

prepared by EARSC  
August 2013

eoSERVICES industry is a trade

2015

eoSERVICESindustry



**A Survey into the State and  
Health of the European EO  
Services Industry**

prepared by EARSC under assignment from ESA  
September 2015

Second survey conducted by EARSC

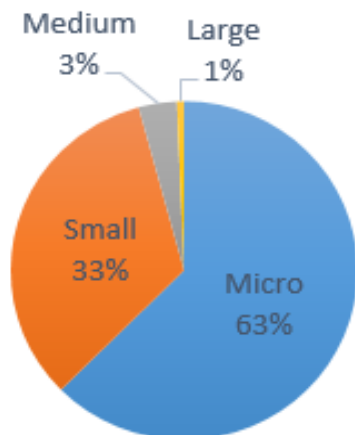
Provides a comprehensive view of the European EO Services Industry

Covers the full range of EO service activities from satellite operators to value-adding and GI companies

Coverage of Europe and Canada

We seek partners to extend the survey to other regions of the world yielding comparable results

# Industry profile

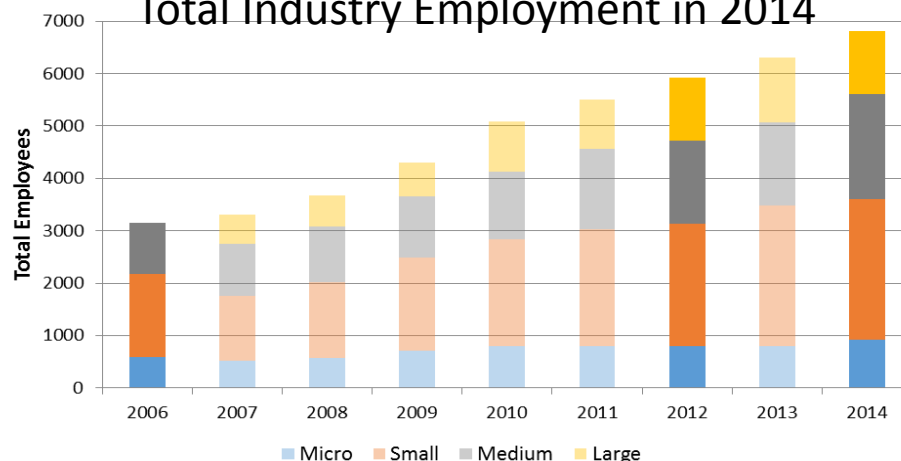


■ Micro ■ Small ■ Medium ■ Large

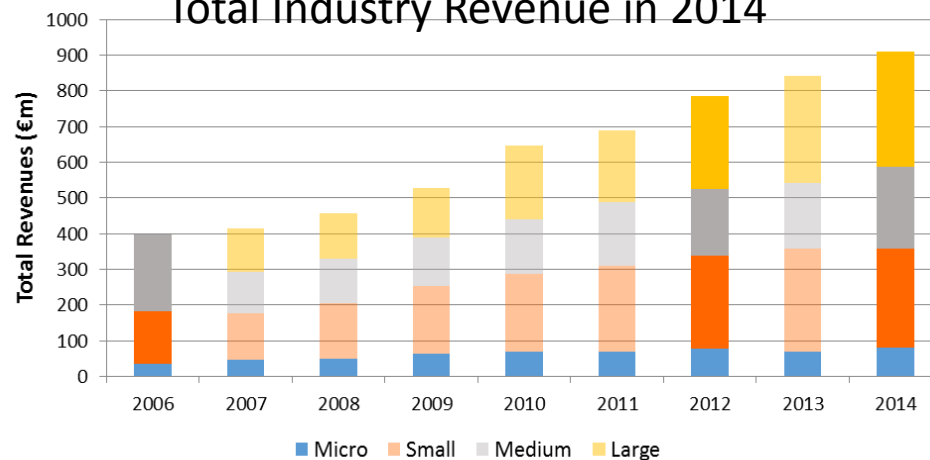
63% = Proportion of companies with less than 10 EO employees:  
96% with less than 50 employees

451 companies in Europe  
6811 direct employees  
€910m revenue

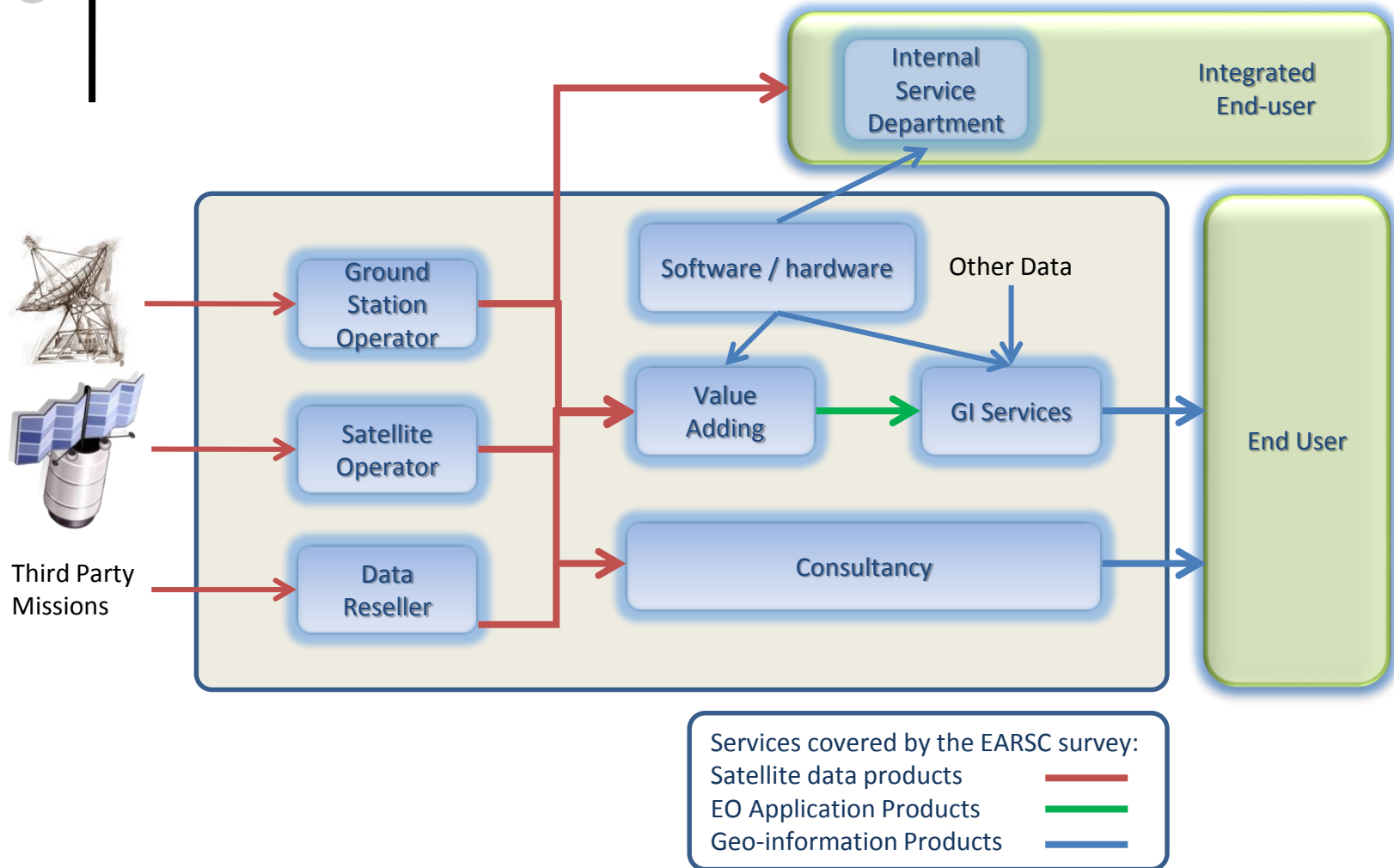
## Total Industry Employment in 2014



## Total Industry Revenue in 2014



# Value Chain



# EARSC EOWiki :

## A comprehensive resource for the Sector

**81 Application topics, 23 market sectors, 92 Success Stories**

### About the EO Wiki:

This is the home of the EARSC EO WIKI space. It provides a great resource for understanding EO applications in all their variants structured according to the [EARSC Taxonomy](#) which identifies a full range of products coming from EO services and describes their application. For a full description of the EO Wiki go to the [specific help page](#).

#### EO SERVICES IN EARSC TAXONOMY

EO applications and services are described using the EARSC Taxonomy to organise them by thematic area and by market sector to which they apply.



#### EO INDUSTRY INFORMATION

Find information on the companies supplying EO Services and some of their successes



#### EO ACTIVITIES

Find information on some of the major research and development projects in Europe as well as on new technologies being introduced to the sector.



#### EO PARTICIPATION & QUESTIONS

Find partners and information to participate to R&D activities and ask questions of experts in the field.



[www.earsc-portal.eu](http://www.earsc-portal.eu)



# EO4OG : Sector Focus

## A comprehensive resource for the O&G Industry 224 Challenges, 94 EO Products, 19 Use Cases

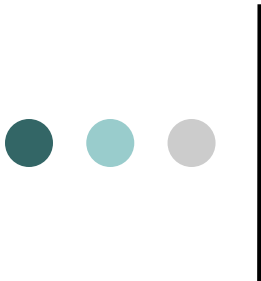


EO4OG - provides a comprehensive guide to geospatial Products using EO data dedicated to meeting the needs (challenges) of the Oil & Gas Industry.

EO4OG: EO geospatial products for the Oil & Gas Industry




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## A MARKETPLACE BETWEEN EARTH OBSERVATION INDUSTRY & USERS

231 COMPANIES

27 COUNTRIES


365 SERVICES

221 BUSINESS QUERYS

**EOpages** is a marketplace between the Earth Observation Service Industry & Users. EOpages shows the capabilities of the geo-information industry in general and value-adding companies in particular.


The objective of **EOpages** is to help potential customers explore the available value-added geo-information services of interest to them in a new and user-friendly way.

[More info about the project >](#)




### Search & Find

Search & Find is an easy, three-step process, guided search to access our exhaustive information repository on the EO industry.




### Address Book

Address Book contains the latest contact information of the EO industry. The online Address Book is easy to use, simply selecting and choosing the relevant categories or tags.




### EOMarket

EOMarket is a customise section where Users contact directly industry looking for product's technical characteristics, applications, availability, resources, etc...




### Success Stories

Some examples of recent **success stories** resulting from EO industry development activities.



### News

The news section aims to provide a quick access to the top stories. We provide information for stakeholders and users about the capabilities of the information value added services.



### About

EOpages is a brokerage platform to help potential customers find suppliers whilst service providers will be able to promote their products.

[About Us](#)
[Legal Information](#)
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[Glossary](#)
[API](#)
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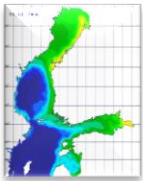
<http://www.eopages.eu/>

# From Satellites to Supermarkets

## The Economic Benefits

The Study shows that the Finnish & Swedish economies benefit from the use of satellite imagery coming from Copernicus;

Between **€24m and €116m** of economic benefit is made each year.



**€2.3m pa**

Icebreakers use imagery to find the best routes through the ice



**€2.1-€3.3m pa**

Ships save fuel and time



**€5.8-€9.4m pa**

Ports are able to operate more efficiently



**€6.3-€63m pa**

Factories are able to operate all year round

Citizens can be sure that the supermarkets (and petrol stations and pharmacies) are stocked.



**€3.5-€17.5m pa**



# Industry and GEO (1)

- GEO is a public sector organisation created to improve efficiency of development of satellite systems through better co-ordination of efforts.
- Following success of Landsat open data policy and reflecting the open data movement GEO has led efforts to make government-owned satellite-data free and open.
- More recently GEO has focused on 9 Societal Benefit Areas (SBA's) and stimulating research efforts to improve the information available
- Engagement with the EO Services sector is to be welcomed even if outcome is yet unclear.
  - EARSC and AAEO wrote to GEO in 2005 proposing a dialogue



# Industry and GEO (2)

What can GEO do to help the industry develop

1. Enable Data Access by promoting a free and open data policy BUT balancing the interests of the public and private sectors.
2. Raise awareness amongst GEO stakeholders of the technical capabilities and help co-ordinate between research and commercial interests.
3. Understand public sector needs by maintaining a dialogue with the GEO stakeholders and interpreting these needs into future system or product capabilities (through R&D if necessary).



# Industry and GEO (3)

What can Industry do to help GEO?

- Industry can offer:
  - Data coming from commercial satellites
  - Products and services supporting the SBA's
- 1. Help GEO by filling capability gaps through private investment
- 2. Provide operational services meeting long term commitments not met by scientific objectives



## Industry and GEO (4)

How could this be achieved? - develop Engagement with the Private Sector:

- Create a recognised channel of communication between industry and GEO secretariat and stakeholders.
- Regional industry meetings backed up with Industry forum alongside the Plenary?
- Industry should not pay to be a partner for GEOSS; any transfer of money would risk creating a serious market distortion. (industry funding government, pay to talk! large co's vs SME's)

Together we can create a win:win for society.



## For more Information

All Information is available through the EARSC web-site:

[www.earsc.eu](http://www.earsc.eu)

or contact : [secretariat@earsc.org](mailto:secretariat@earsc.org)

and for more information on the remote sensing industry:

[www.eopages.eu](http://www.eopages.eu)

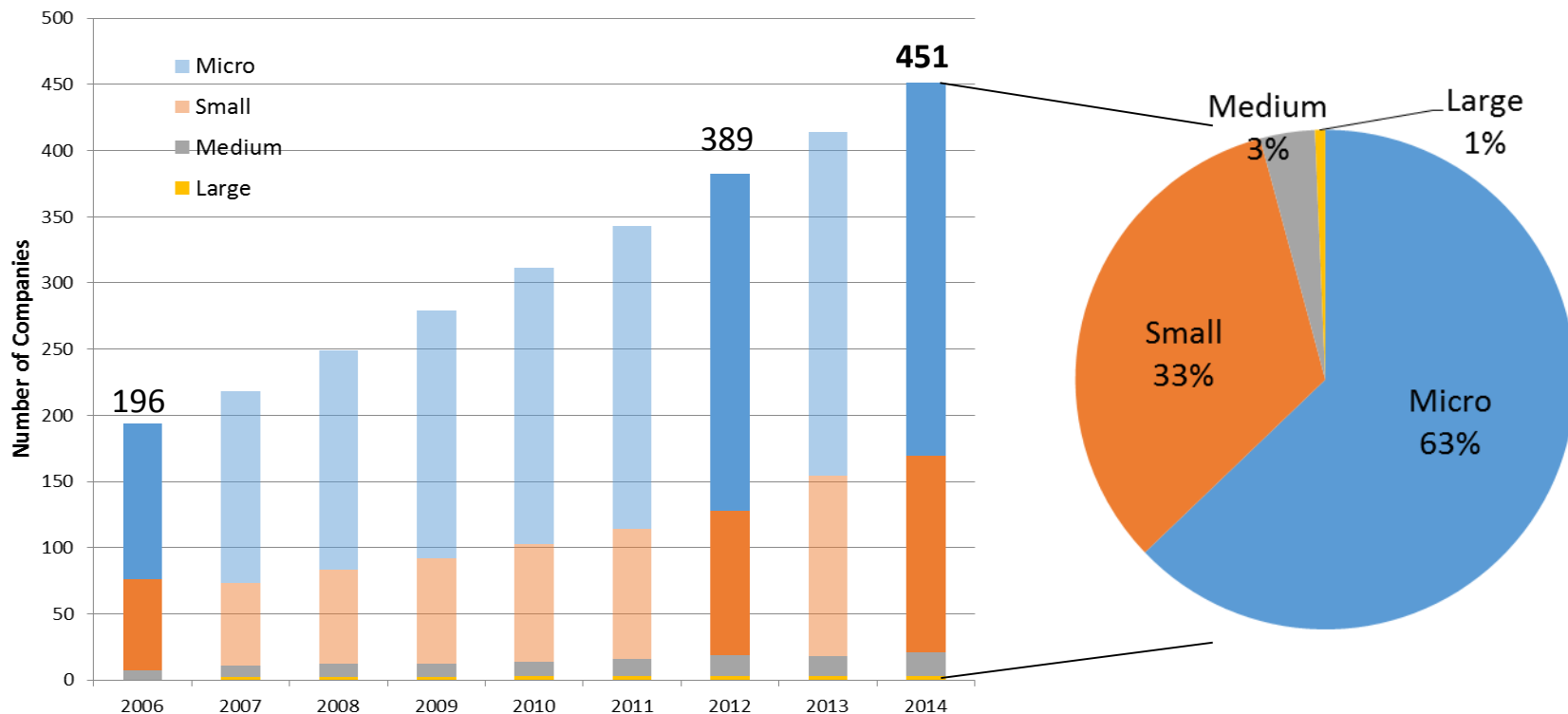
For information on EO applications: [www.earsc-portal.eu](http://www.earsc-portal.eu)

For links to the O&G Community: [www.ogeo-portal.eu](http://www.ogeo-portal.eu)

Subscribe to : [www.eomag.eu](http://www.eomag.eu)



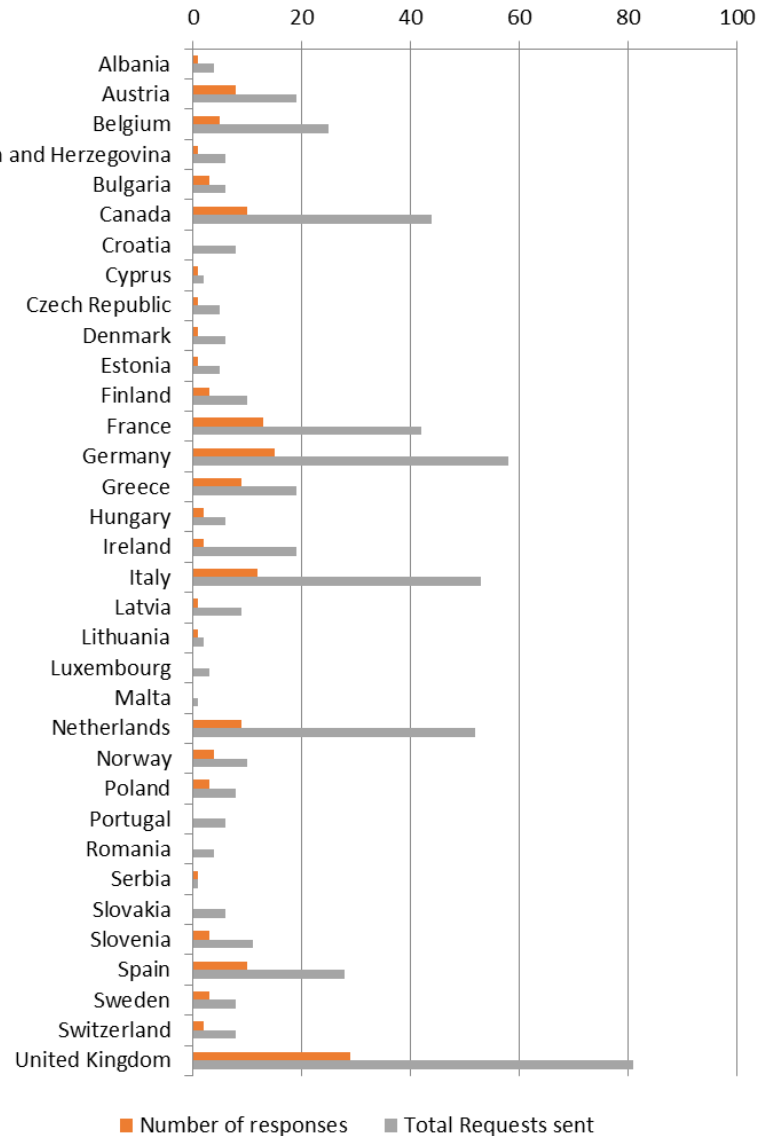
# Number of EO Service Companies in Europe and Canada



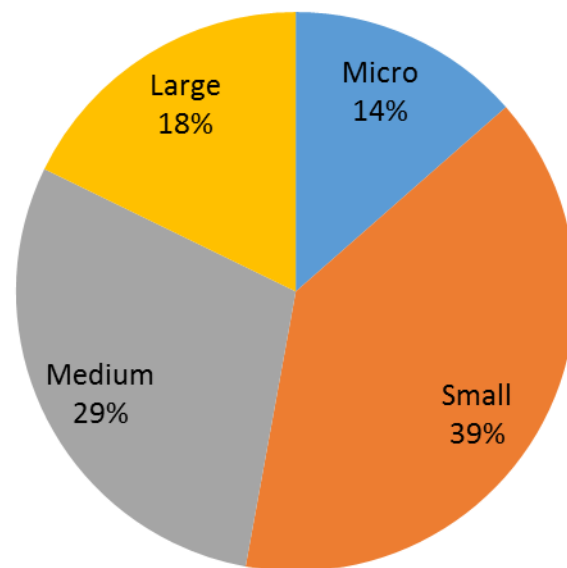
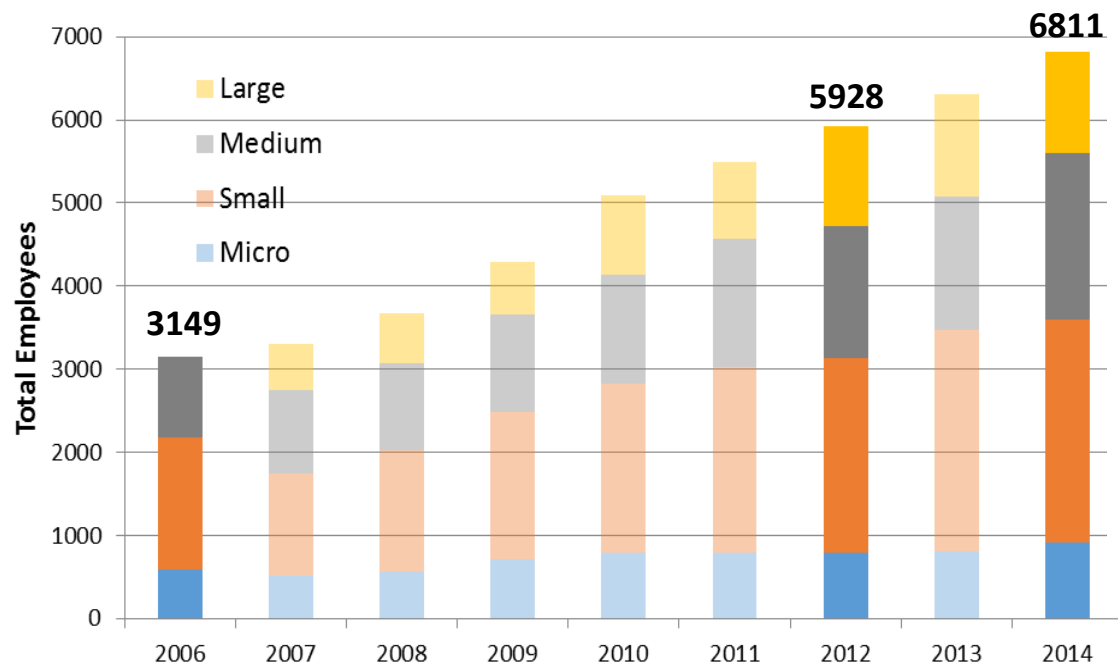
Over 95% of companies have less than 50 employees and over 60% less than 10.

# Geographic distribution

- Companies are distributed throughout Europe with 10 countries having 20 or more companies
- This is a strength to serve local needs but is not a good position from which to address the global market



# Industry Employment Profile

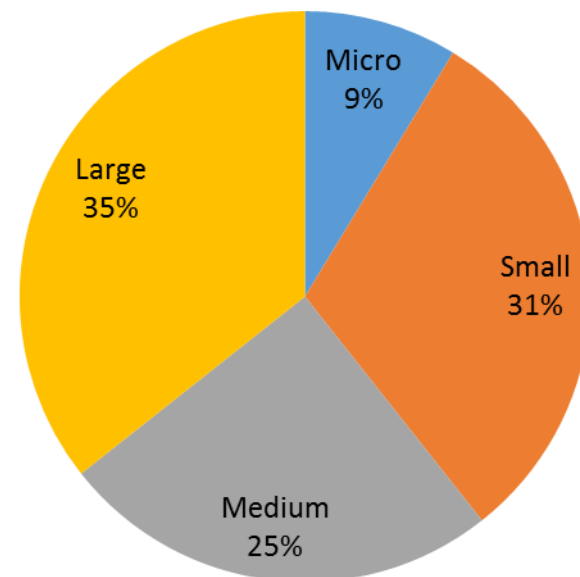
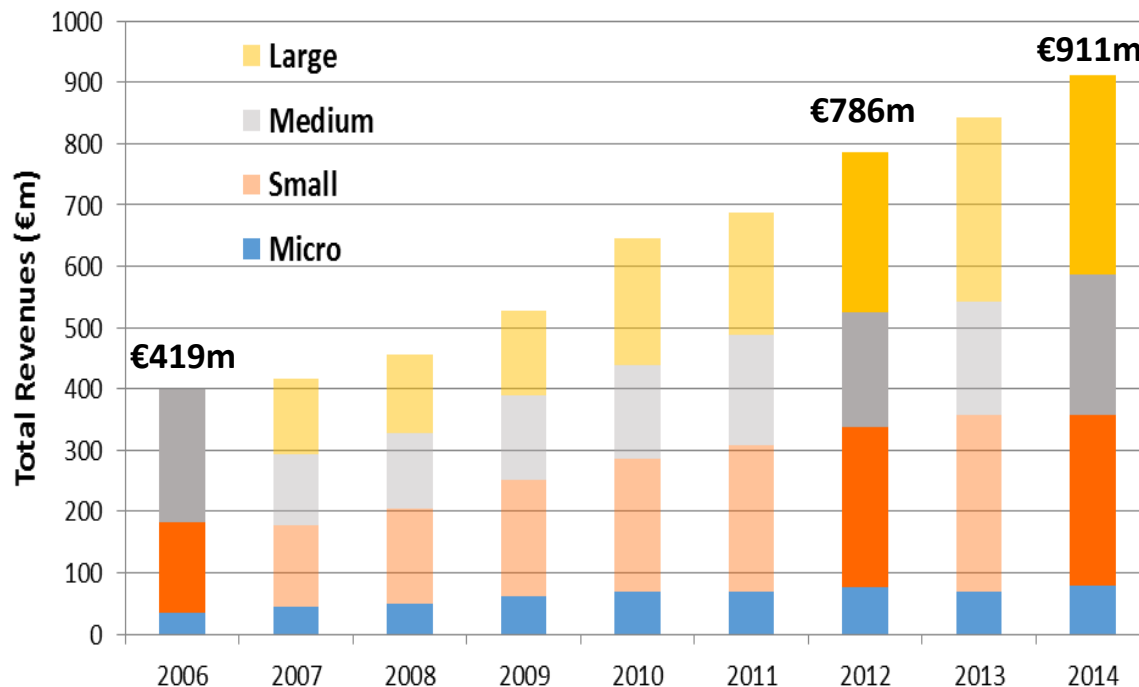


Number of employees has grown from 3000 in 2006 to nearly 7000 in 2014

8 year growth rate of 10.8% p.a. (cagr)  
2012:2014 = 7.2%

Large and medium companies employee 47% of the workforce

# Industry Revenue Profile



Total revenue has grown from €419m in 2006 to €911m in 2014

8 year growth rate of 11.8% p.a. (cagr)  
2012:2014 = 7.6%

Large and medium companies account for 60% of revenues.