EARSC

European Association of Remote Sensing Companies

The Evolving European EO Services Industry

Geoff Sawyer: EARSC Secretary General

What is EARSC?

Trade (non-profit) association founded in 1989, dedicated to helping European companies ***providing services, including consultancy, or supplying equipment in the field of remote sensing***.

- **Foster the development of the European Geo-Information Service Industry**

- **Represent European Geospatial-Information providers, creating a sustainable network between industry, decision makers & users**

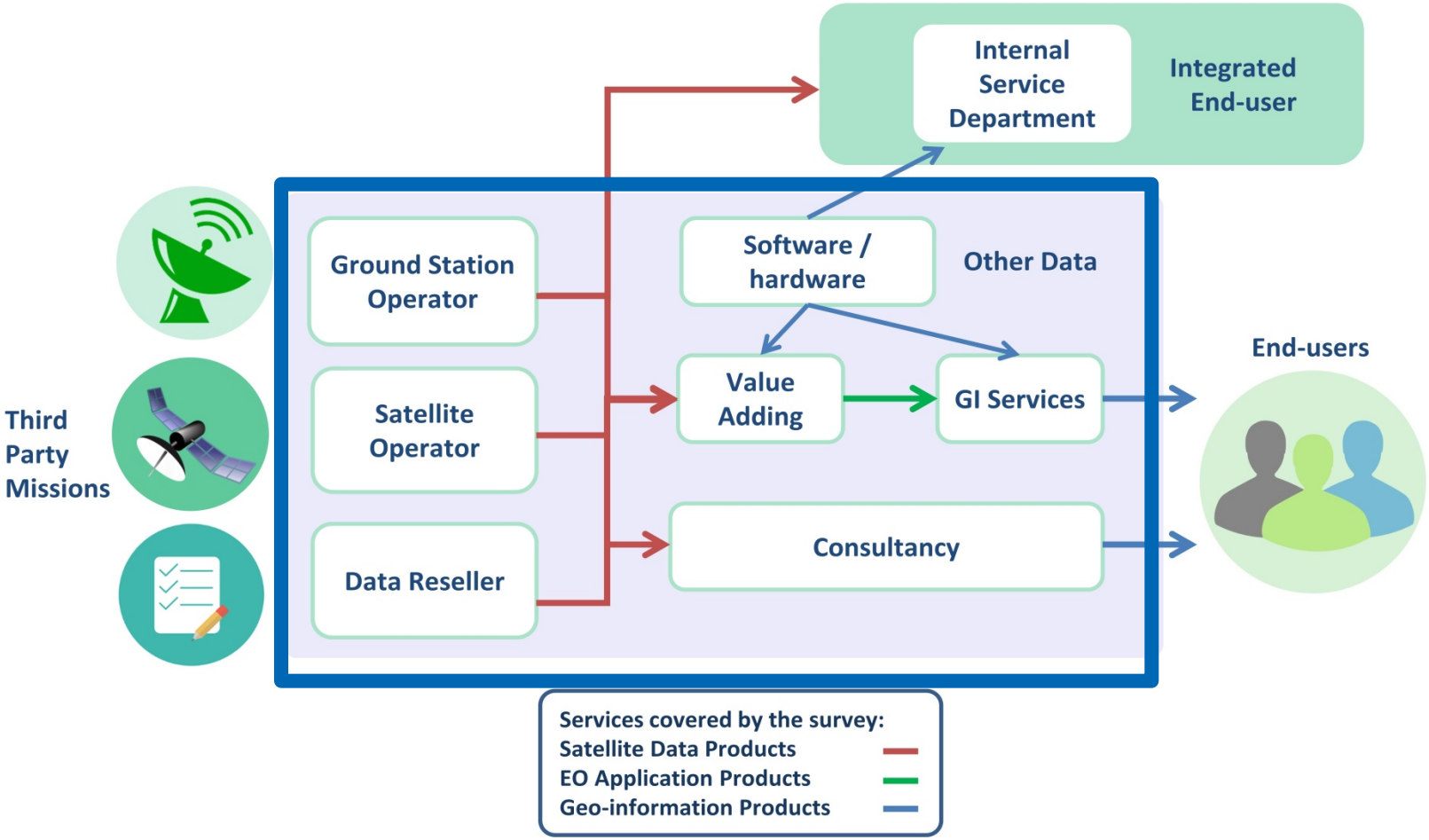
What does EARSC do?

1. **Provide information** to our members on programmes, policy and the sector
2. Maintain a **knowledge of the industry**
3. **Promote the industry** and its capabilities by:
   - Advocacy towards policy makers on issues of concern
   - Organising events offering networking opportunities
   - Creating links between EO services sector & other business sectors
   - Awareness & media: e.g. eoMag!

EARSC's members

99 members from 22 countries in Europe

EARSC EO Services Value Chain



Industrial Landscape

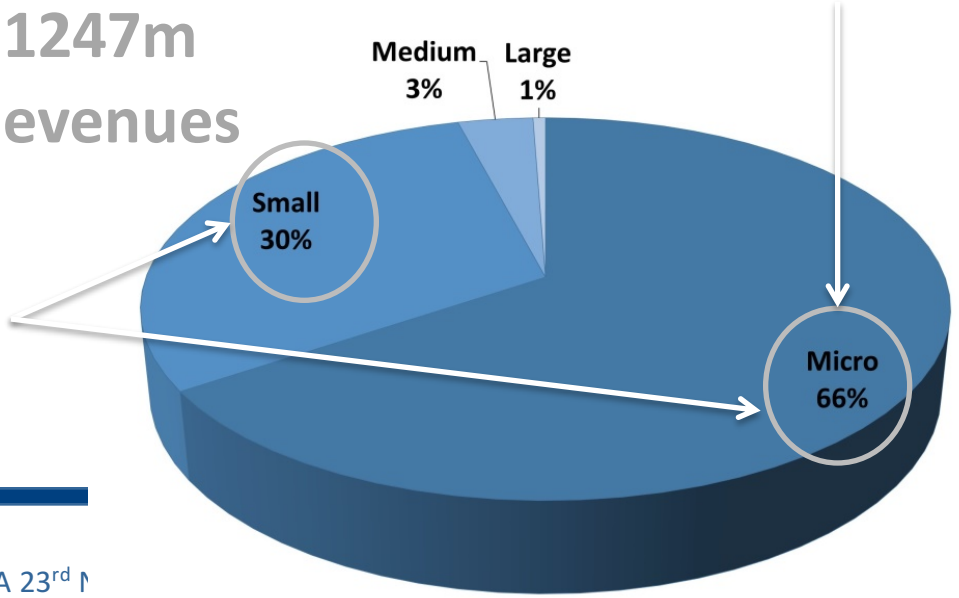
7877
Employees

510
Companies

1247m
Revenues

<10 EO employees

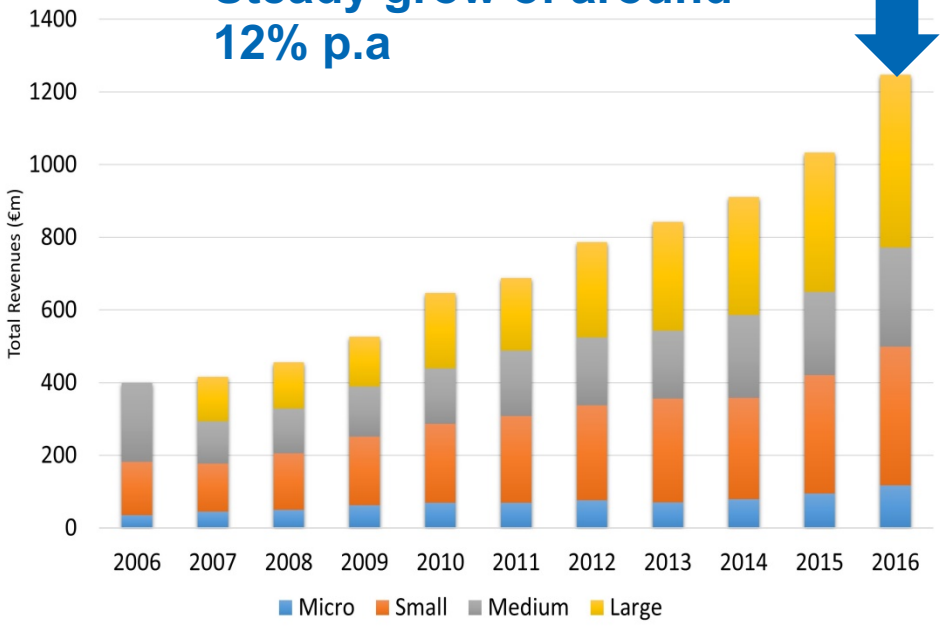
< than 50 employees



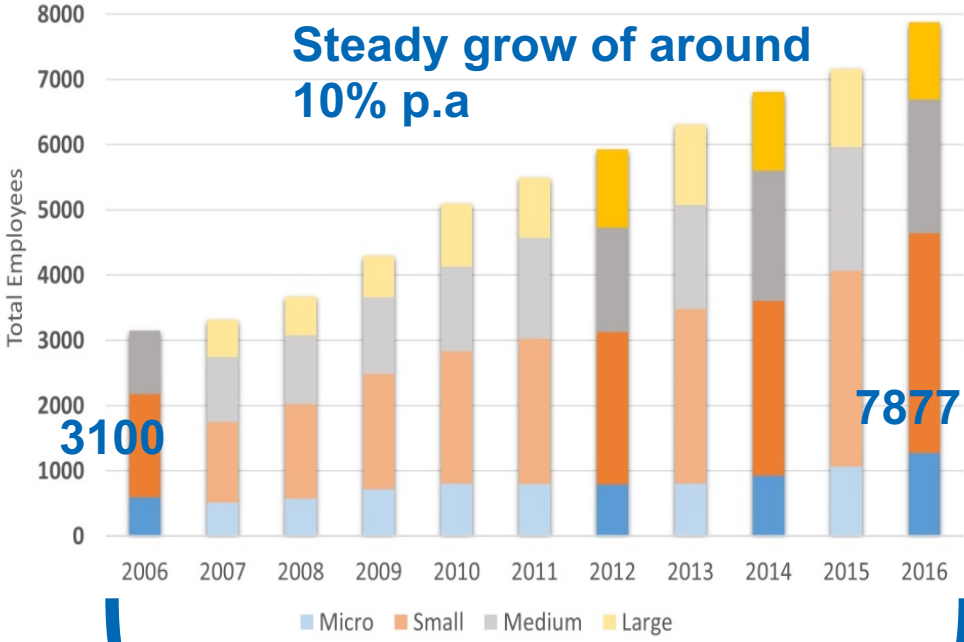
Revenues & Employment

€1247m

Steady grow of around 12% p.a

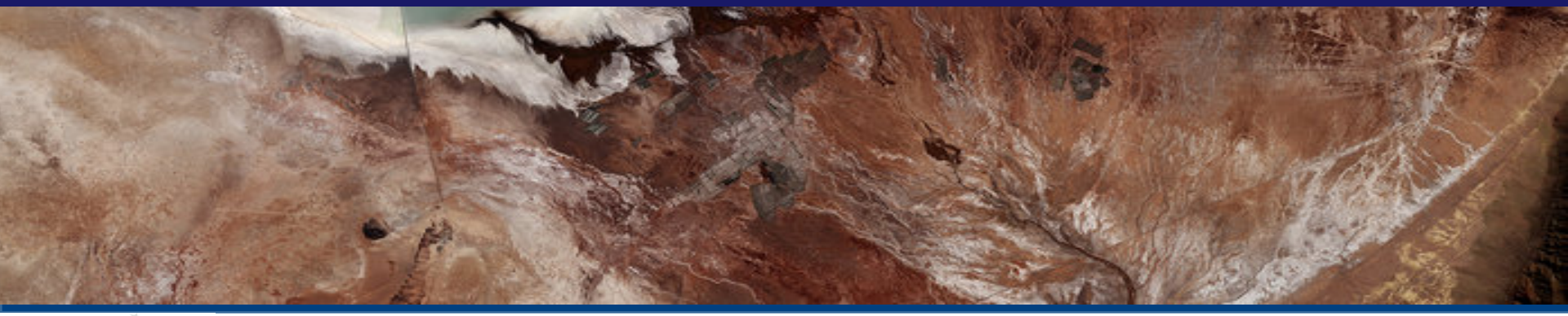


Steady grow of around 10% p.a



Evolution of total employment within 10 years

EO services sector is evolving very rapidly



EARSC
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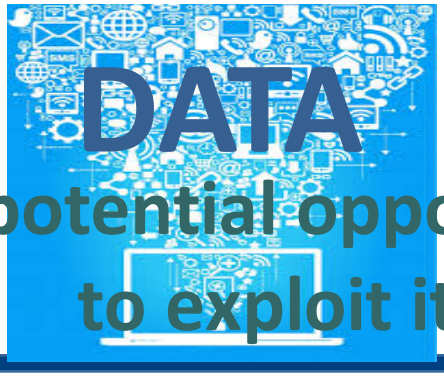
Current Situation…

- Copernicus (€7b EU investment): NEW ERA in EO
- Sentinel data: “free & open data” policy
- New & innovative satellite operators
- New data sources are emerging: eg. UAV, crowdsourcing
- Large IT companies (eg. Google, Amazon) entering
- Machine learning and AI

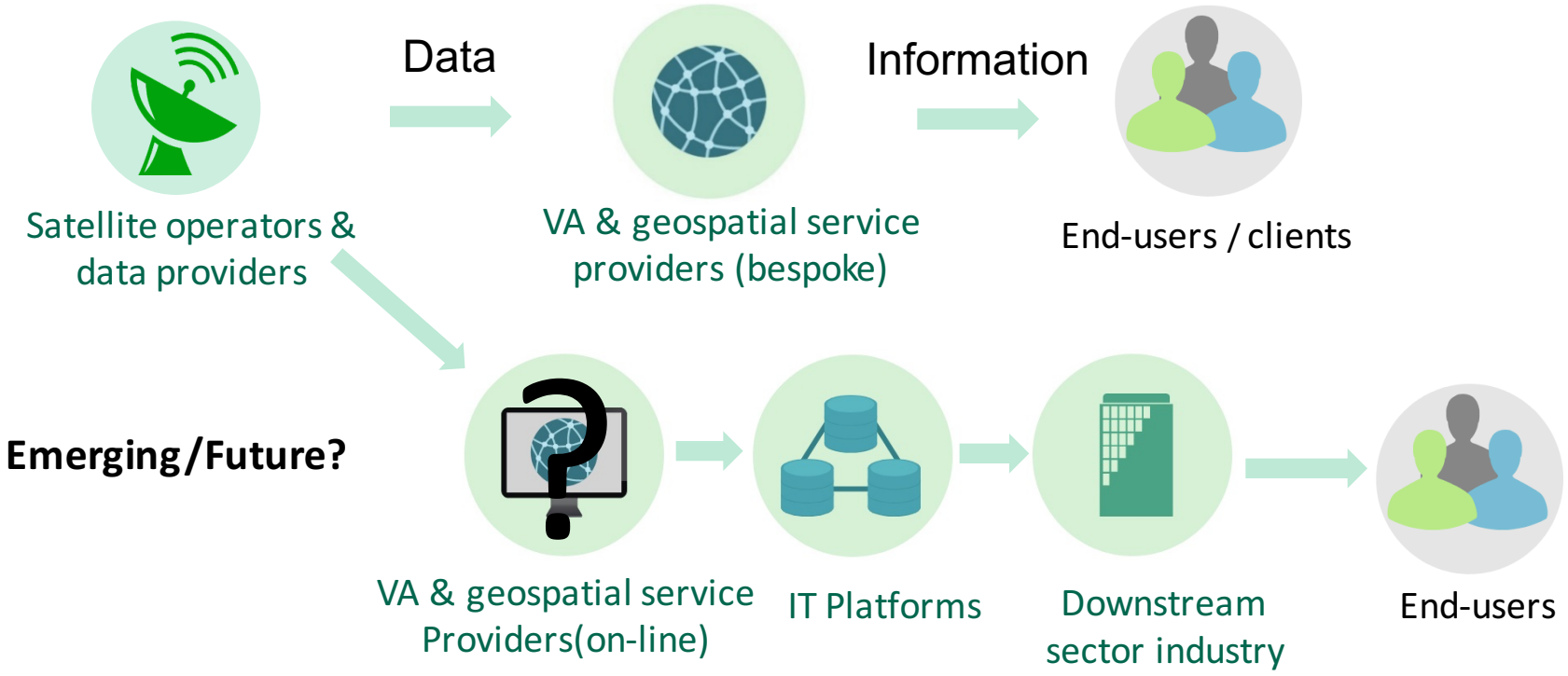


Many potential opportunities to exploit it

Change is happening so fast…..

….the real challenge is to adapt to the rate of change… !!

Future EO Services Value Chain

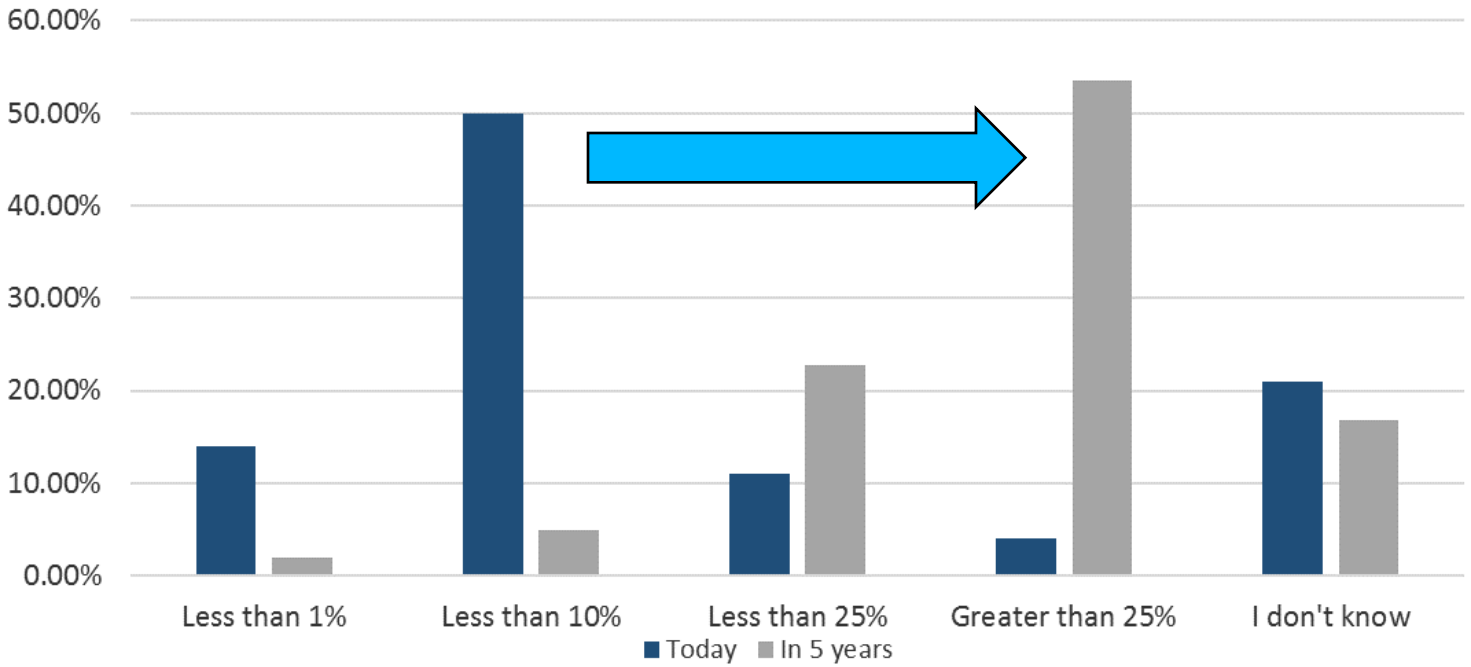


Shift to on-line services

- How big is the shift?
- How fast will it happen?
- How will the value chain evolve?

Market Shift is happening*

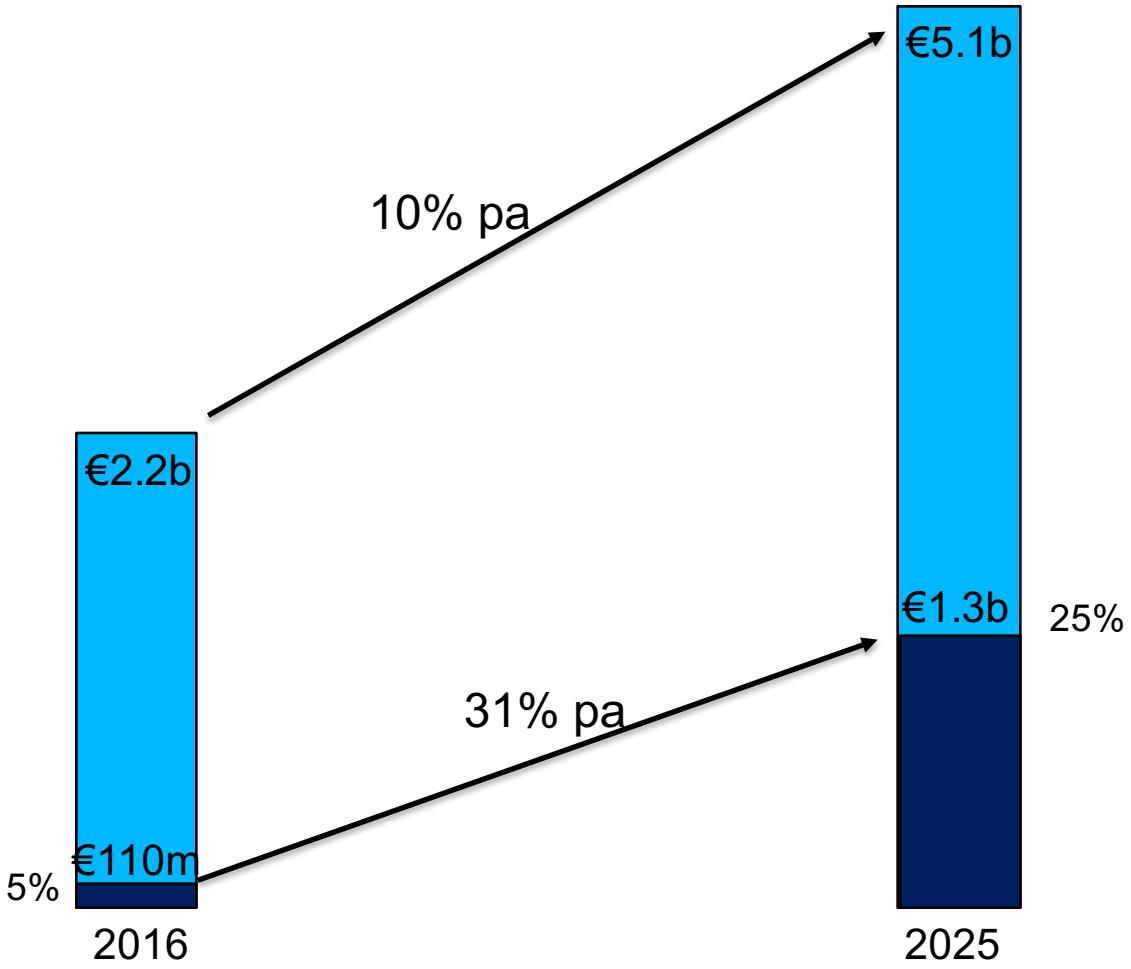
What percentage of the Market is for Fully Automatic Web-Services?



* EARSC Stakeholder Consultation for MAEOS Study

Global Market for EO services

Global growth of 10%pa leads to 30%+pa growth in on-line services



* Global market is 3 times the European market

Different scenarios

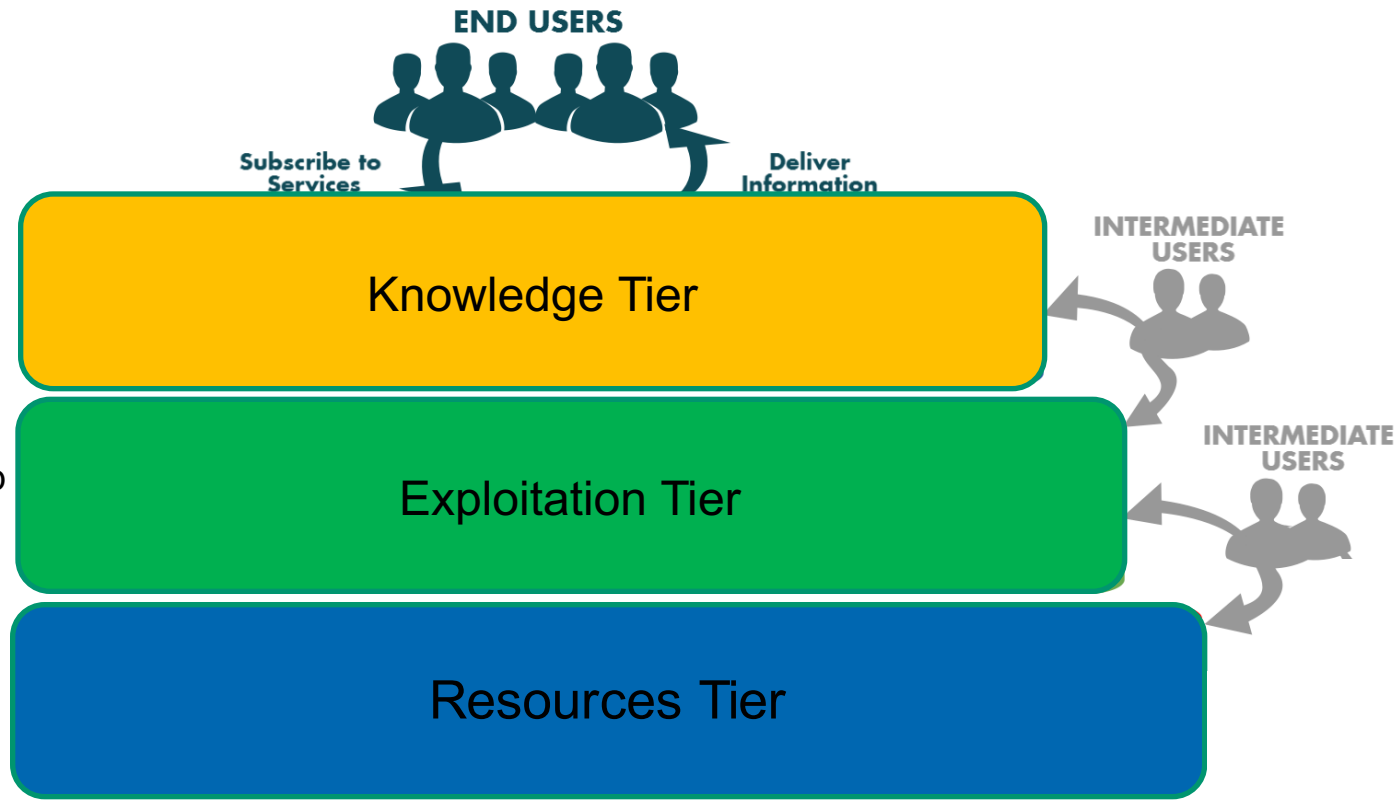
	VA stay independent	Integrated providers	IT integrated	Downstream integrated
Satellite operators & data providers		Dedicated data providers?		
Value added services	On-line service providers			
IT platforms			Major IT providers?	
Downstream services industry				Sector specific providers?
End-users				

“The Common Picture”

Simple 3 tier model recognised and accepted by most stakeholders.

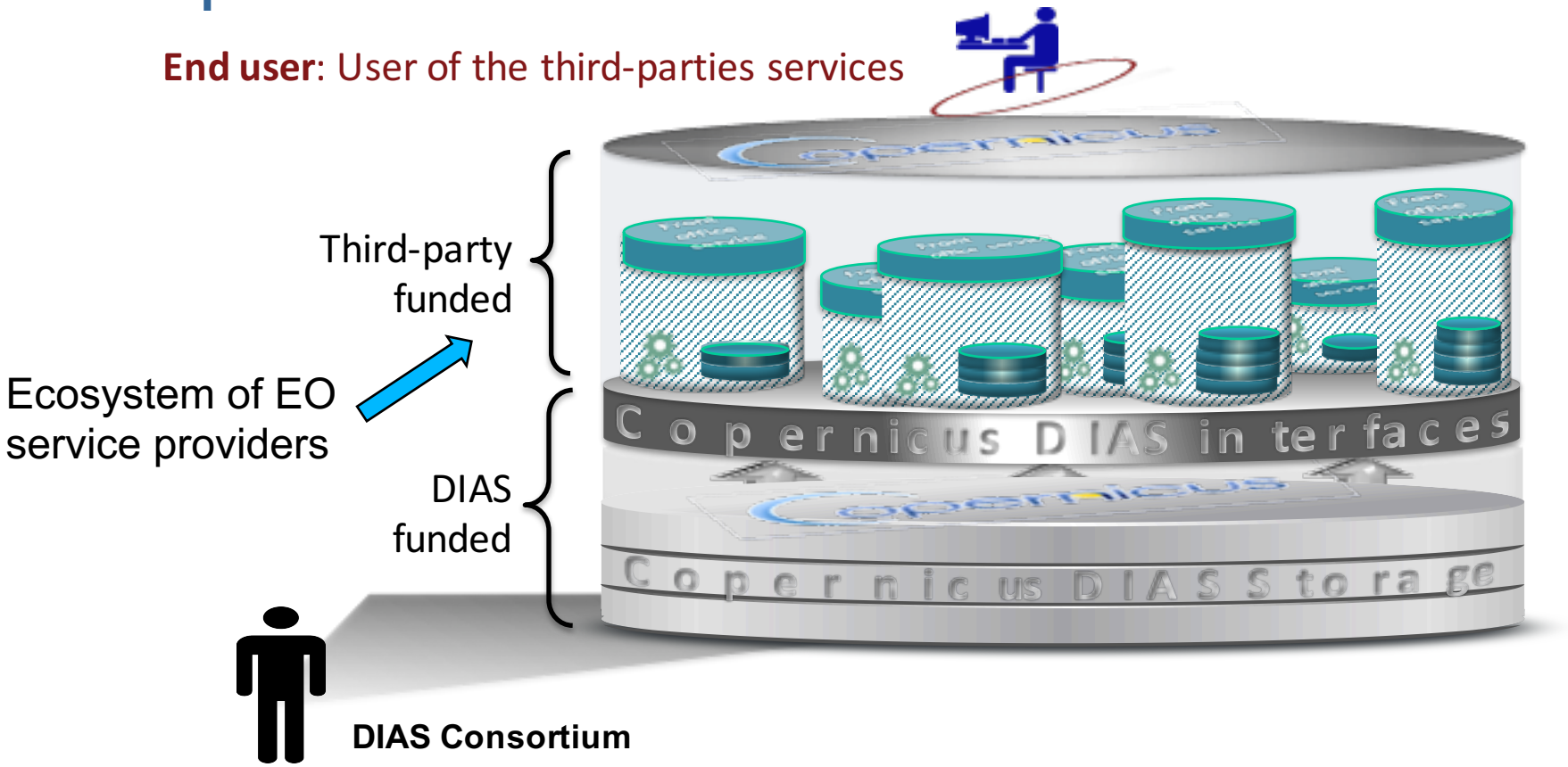
Canvas on which to map the various initiatives.

Represents one view of the supply chain for on-line services

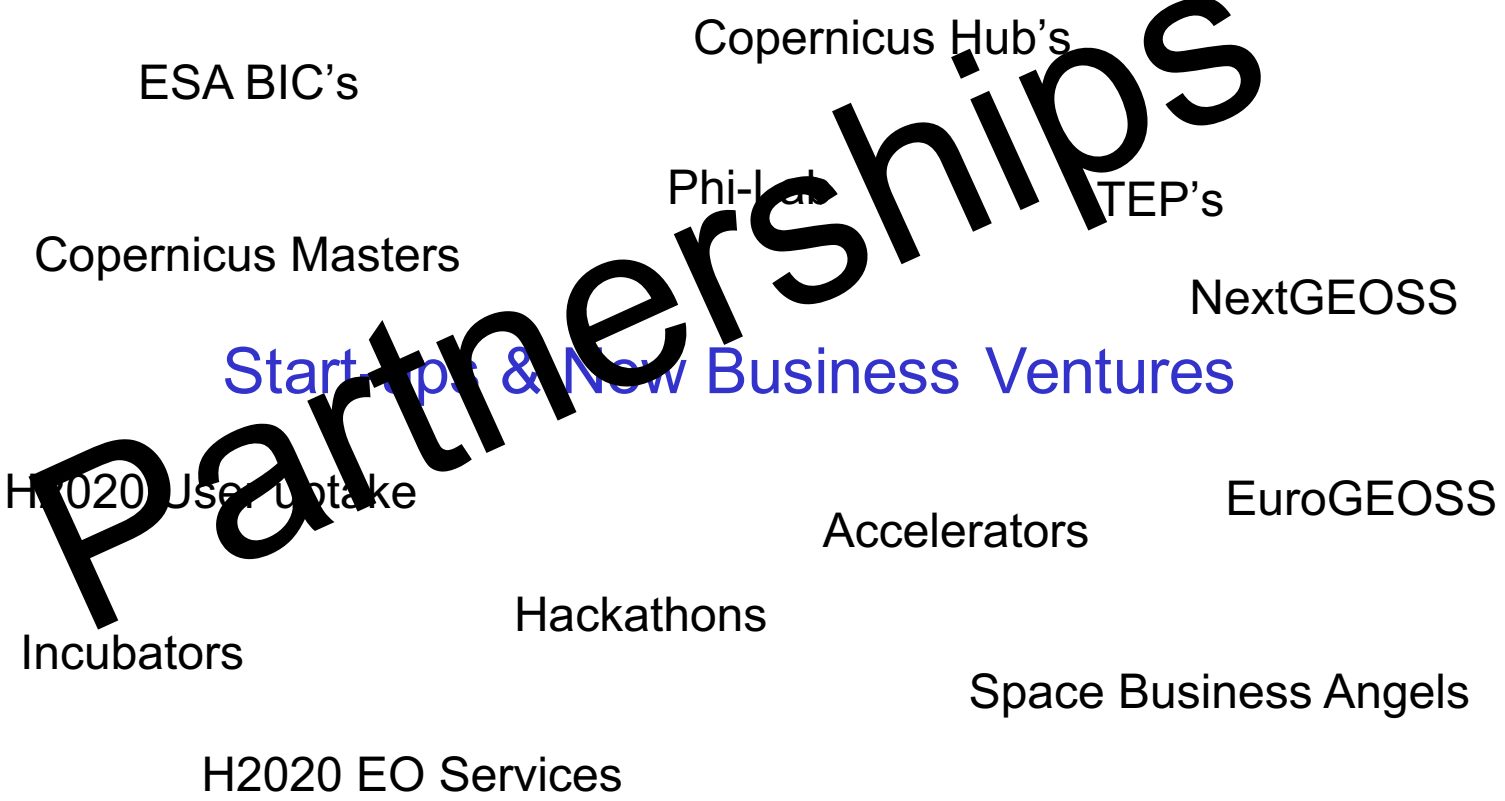


1. RESOURCES TIER: COPERNICUS DIAS

End user: User of the third-parties services



2. Exploitation Tier :
Creating an ecosystem of service providers



3. Knowledge Tier: European Marketplace for EO services

Global buyers can find easily European EO services, data & products

facilitating the European marketplace for **eo**services

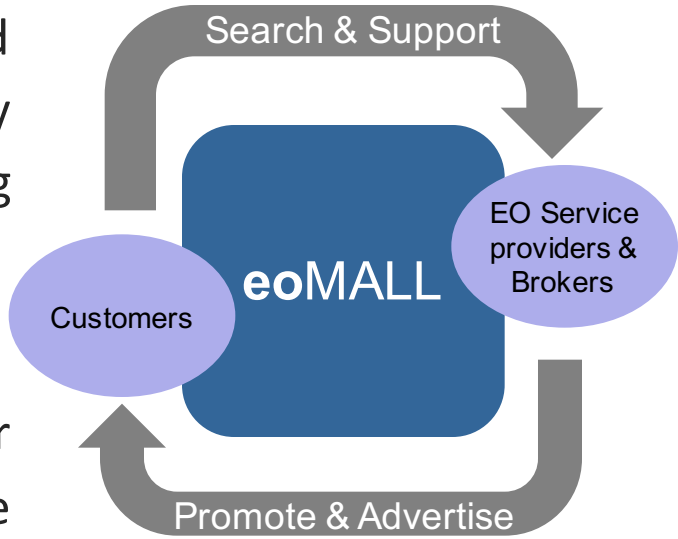
eoMALL…

What is EARSC's Vision for eoMALL?

eoMALL web platform will improve

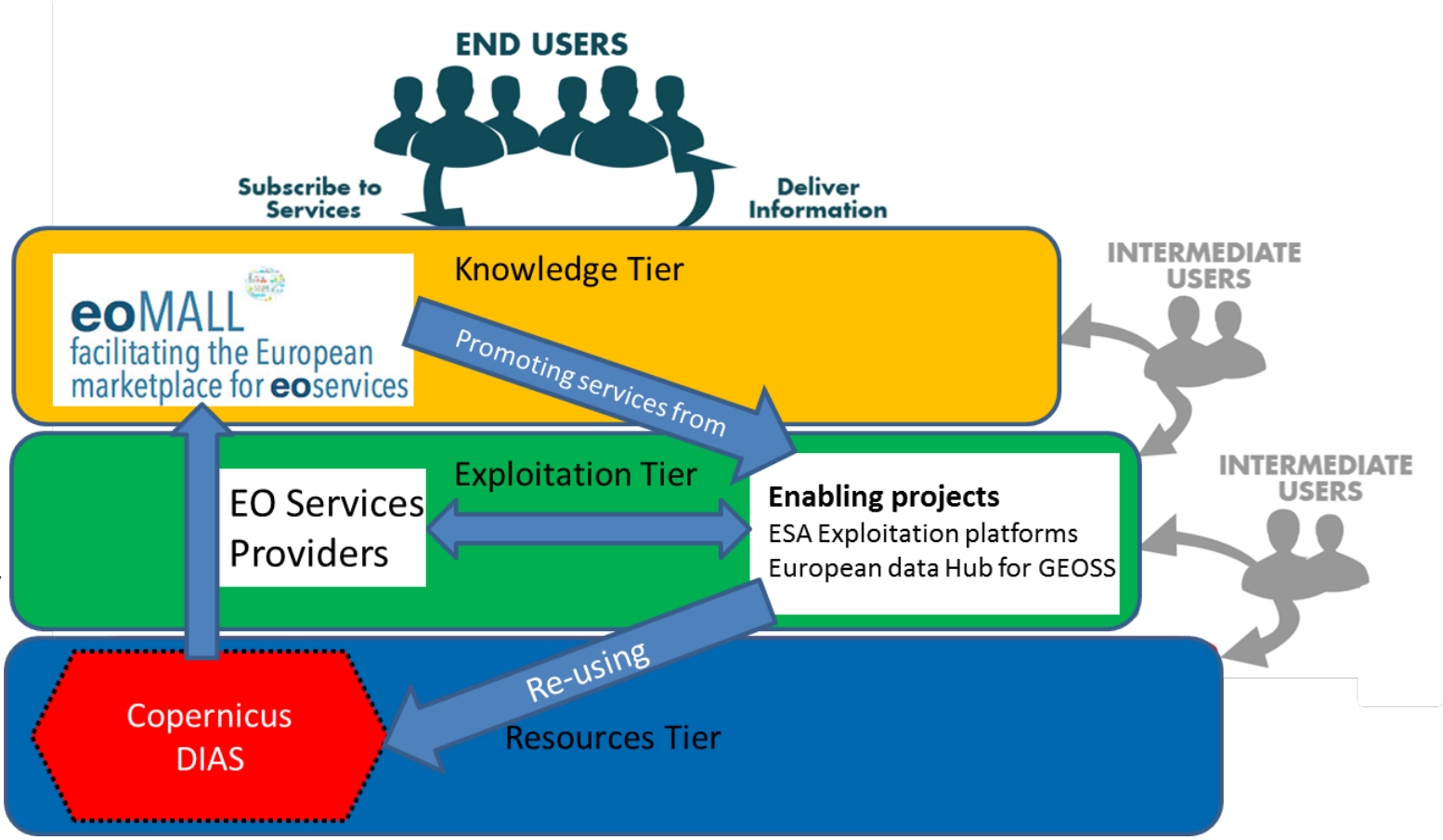
- For Customers: the identification and comparison of top quality services in an easy and transparent way (Intelligent searching tools, Galleries, Support)

- For Companies, the promotion of their capabilities and the understanding of the Market needs



The Common Picture – with eoMALL & DIAS

eoMALL is promoting services which are enabled by DIAS



EARSC Response

On-line Services

- EARSC has established “MAEOS” as a new group within EARSC; open to all qualifying companies
  - “MAEOS” group will oversee and establish the eoMALL portal
  - No competition between eoMALL and members
  - eoMALL tendered (through ESA) and winners selected.
  - To contribute to and benefit from other initiatives, goal is to have the first working eoMALL release in line with operational DIAS (before end Q1 2018).

Bespoke (traditional) business

- EARSC Market Development programme for industry
  - Strong internationalisation effort to develop export opportunities
  - Leverage Copernicus using EC Economic Diplomacy

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Companies

www.earsc.org

www.eopages.eu

www.earsc-portal.eu