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EARSC

European Association of Remote Sensing Companies

Developing the Market – Challenges and Opportunities for European Companies in Delivering Information as a Service

Space Working Party, April 8, 2025

Emmanuel Pajot, Secretary General

EARSC
European Association of Remote Sensing Companies

What is EARSC?

Membership-based, non-profit, Brussels-based, European organization which coordinates & promotes the activities of European companies engaged in delivering EO geo-information services.

Network of 140+ EO companies registered in 25 countries.

@earsc

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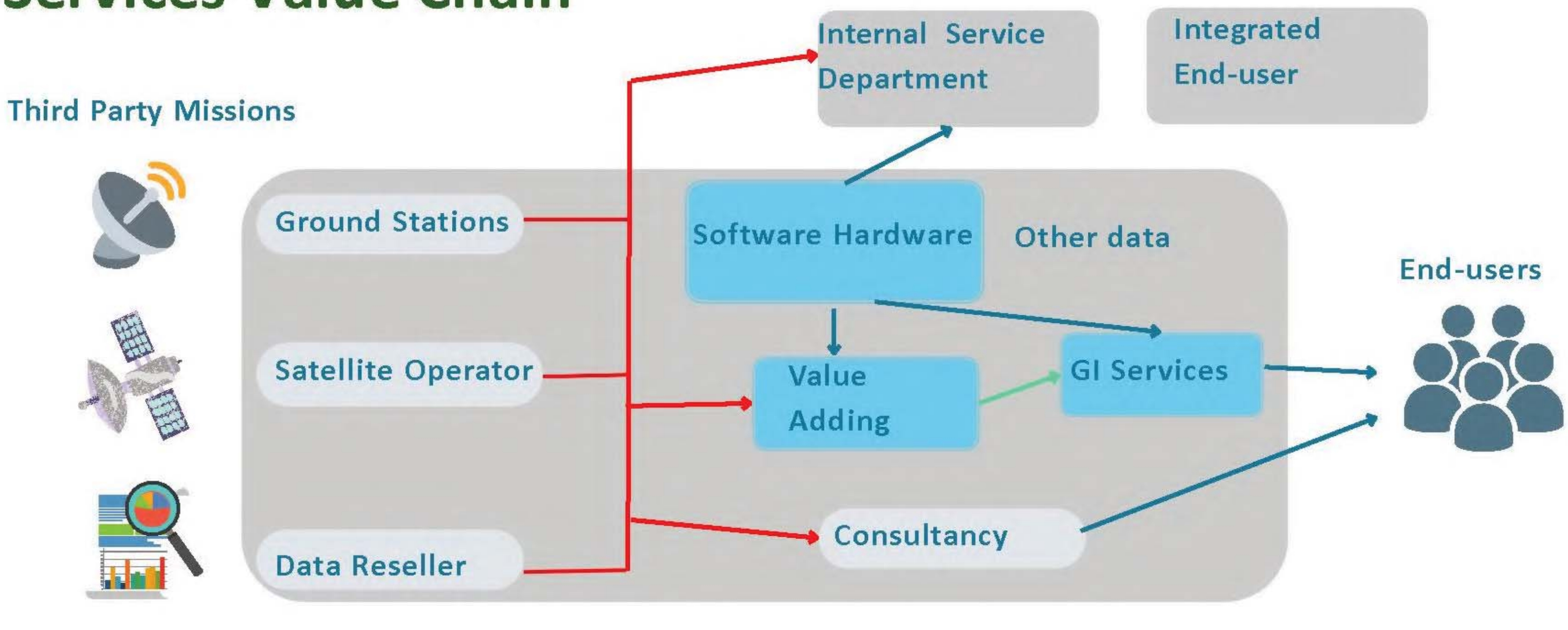
www.earsc.org

eo mag!

eo mall

eo PAGES

EO Services Value Chain



+ “New Space” & Verticalization

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EARSC Members

... from 25 European countries

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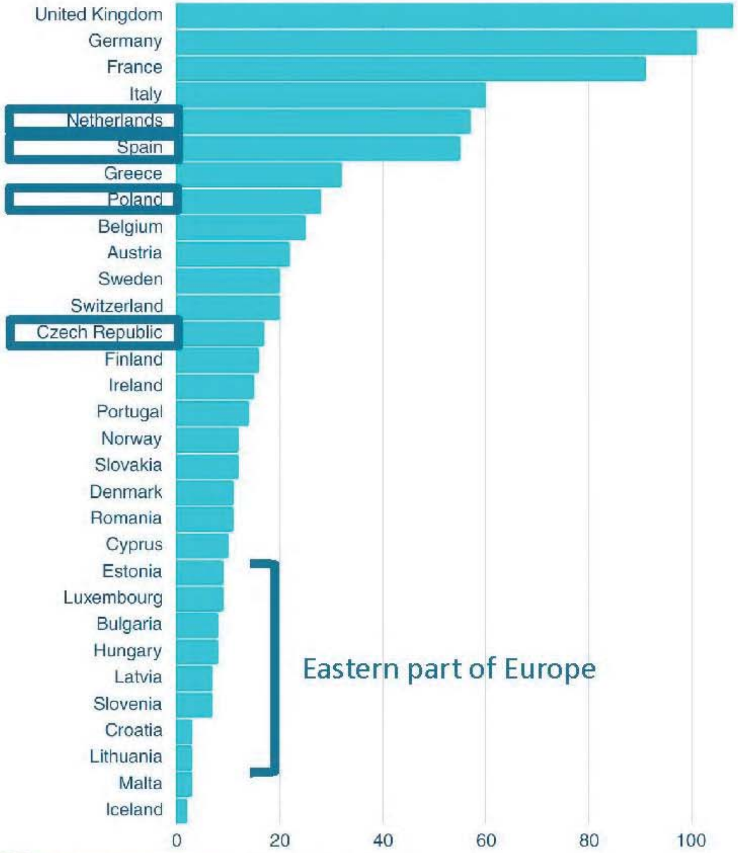
Downstream Private Sector: Industry Survey

796 EO Companies
up from 772 (+3%) year on year

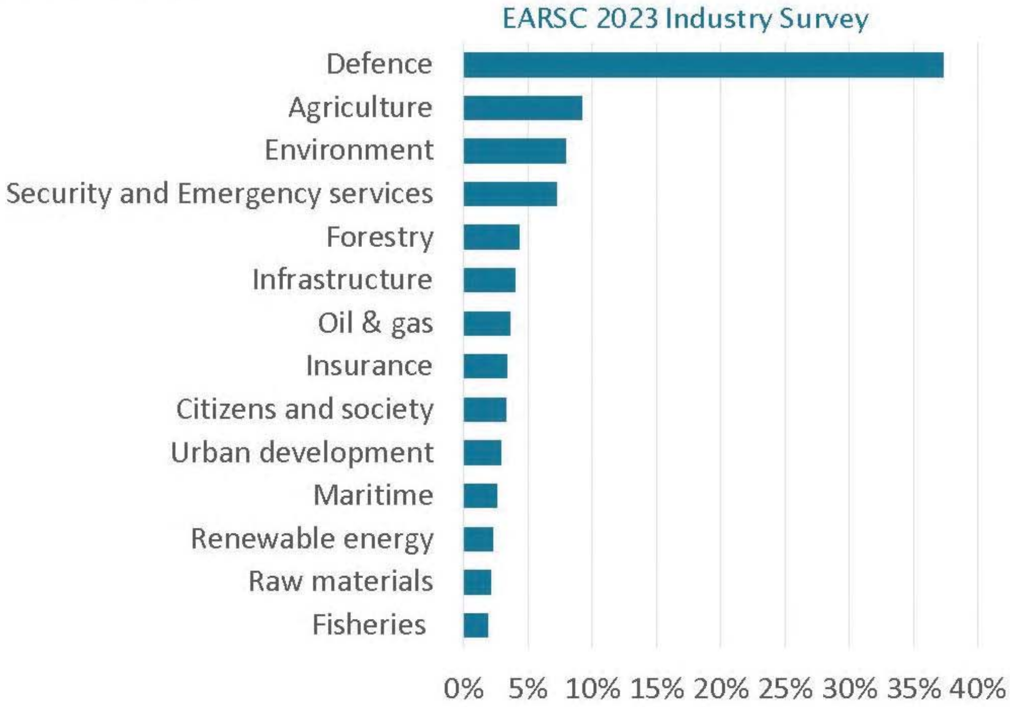
14928 Employees
up from 13796 (+8%) year on year

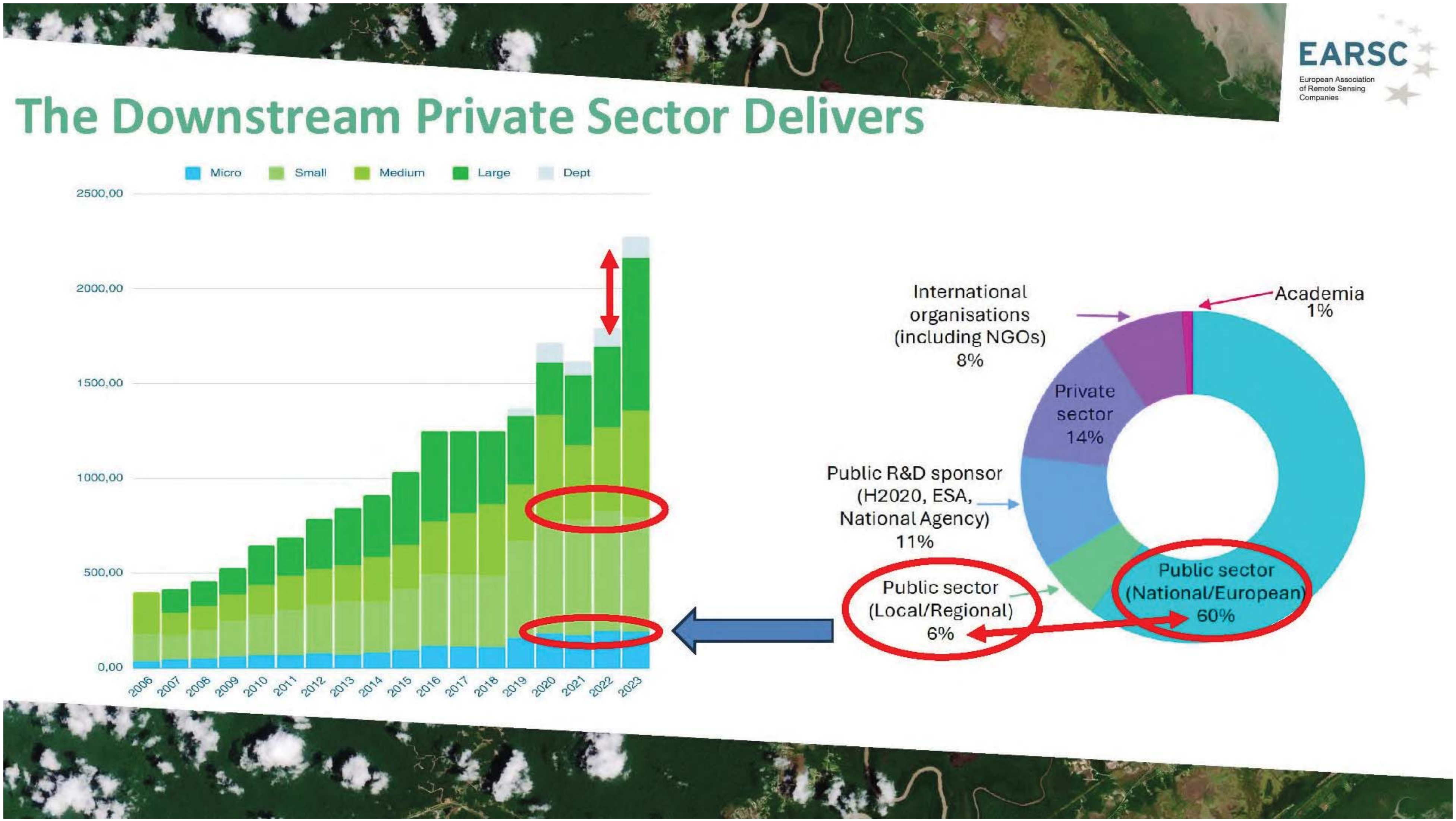


The Downstream Private Sector Delivers

€2. 27b Revenues
up from €1.79b
(+27%)
year on year

10,7% Growth rate
CAGR over
the last 5 years




The Downstream Private Sector Delivers
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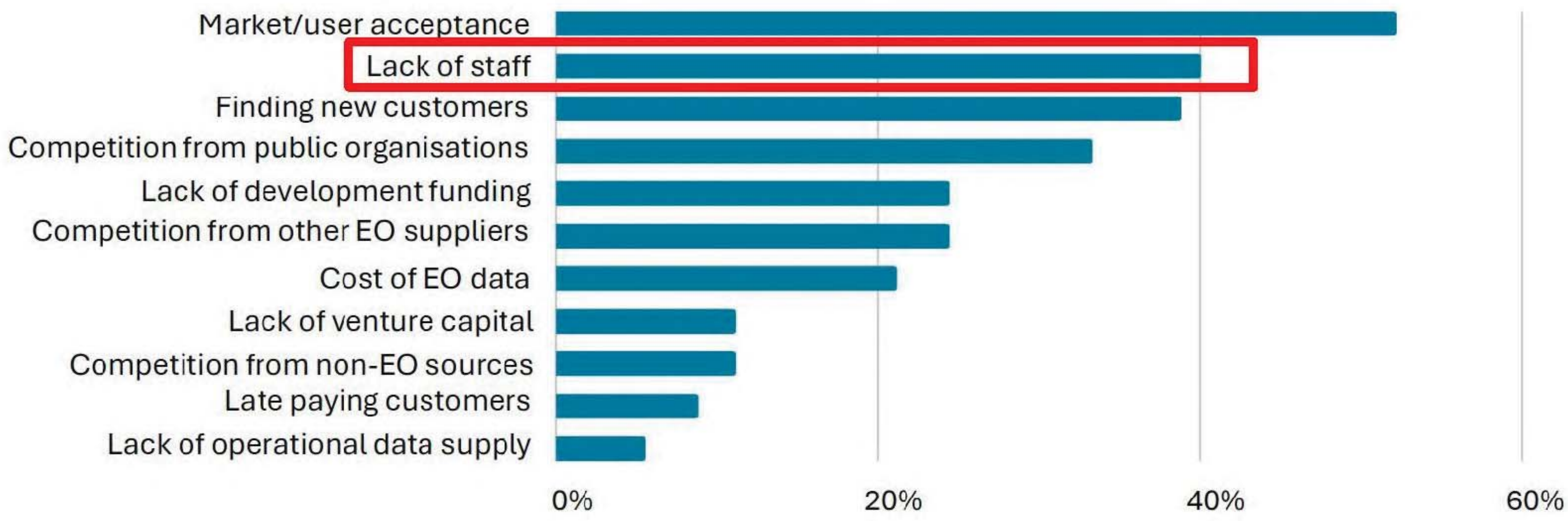
Micro
Small
Medium
Large
Dept
2500,00
2000,00
1500,00
1000,00
500,00
0,00
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
International organisations (including NGOs) 8%
Academia 1%
Private sector 14%
Public R&D sponsor (H2020, ESA, National Agency) 11%
Public sector (Local/Regional) 6%
Public sector (National/European) 60%

EO Downstream Challenges



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Regulatory Frameworks to Create New Markets

- **Acknowledgement of the work done by the previous Commission to integrate EO in new policies to support the Green Deal**
  - ➔ Establishing a clear political message is crucial
  - ➔ Earth observation is an important means to implement policy, acting as a key tool for monitoring, reporting, and verification.

Awareness of EO remains limited and capabilities are often misrepresented in policy

- **SMEs** are deeply involved in the development of these solutions often based on Copernicus
  - ➔ It is vital to continue support actions (R&I)
  - ➔ It is vital to continue to involve, and increase the involvement of non-space actors including thematic DGs, ministries, non-space commercial entities, and local and regional authorities.

Call to members for services supporting SDGs: 120+ contributions

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Demand Consolidation

- Strong user **uptake strategy for both Civil <u>and</u> Security dimensions.**
- Need to continue the development of services to support Climate Adaptation and **to involve local & regional users** as well as commercial actors which currently are not sufficiently taken into consideration AND support collaboration with Copernicus Entrusted Entities.
  - Does it require an update of the EUSPA mandate? Role of thematic DGs?
  - Extension of the Dynamic Procurement System (DPS) to services.
- Need to maximize the number of **companies involved in the security domain** with a focus on SMEs
  - Create **pathways** for companies to access these markets-
  - Federate user requirements – SatCen, EEAS, EDA, MoD to standardize services.
    - ➔ Development of a dual-use ecosystem.
    - ➔ Need to develop a forum where security and defense stakeholders and actors can exchange and share knowledge or solutions.

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Demand Consolidation

- Facilitate and strengthen the provision of data and services to users.
- **National constellations should support Copernicus** at large and be user centric (end-user or service providers) to maximize their sustainability.
  - Data: common platform to facilitate the access to the data and the capability to task the satellite, if possible.
  - Services: maximize national constellation user uptake, co-design solutions, to ensure services can be used transversally by other countries.
- European Resilience & Security Constellation – *to be defined*
  - Maximize the use of **current European assets and partnerships** before manufacturing new satellites. This is key to minimize cost and to be time-efficient.
  - Move to an “**intelligence as a service**” approach for data and services as done in the USA, with the EC and MS as anchor tenants.

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Competitiveness

- **Long-term commitment and adequate budget:** Europe under invests in space when compared to other regions. The budget must be aligned with the growing user adoption. The EO industry needs to have a clear roadmap to support investment that ensures long-term stability.
- **Diverse funding sources:** Space is connected to many different markets and has the potential to deliver benefits to many others. Space requires support from other sectors to exploit its full potential.
- **Improve access to commercial space data and service:** New approaches, such as long-term procurement mechanisms, public-private partnerships, and new open licenses for commercial data and services, would ease access and support user uptake. These will support European ambitions in a rapid and cost-effective way.
- **Policy drivers:** It is vital to further encourage and legally mandate the use of EO for policy implementation across different sectors and establish pathways for SME involvement and innovation.

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