

EARSC

European Association
of Remote Sensing
Companies



The Future of GMES **Brussels Space Policy Round Table**

Geoff Sawyer, Secretary General
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What is EARSC?

- EARSC is a non-profit-making organisation created in 1989 as the voice of the European geo-information EO service industry
- Mission & objectives:
 - to foster the development of the European Geo-Information Service Industry
 - to stimulate a sustainable market for Geo-information services using EO data, openly accessible to all members
- Today EARSC has 70 members in more than 22 countries, and is a recognized association worldwide
- Represents European geo-information providers creating a sustainable network between industry, decision makers and users



European EO Services Industry

- Offers a full range of services based on extensive experience serving government, industry and the citizen
- Includes data providers, downstream service providers, software and consultancy companies with a mastery of space-borne/airborne/in-situ systems and sensors technologies.
- Innovative / dynamic; many new companies, changing ownership
- Between 100 and 200 companies largely SME's with strong partnership experience across European borders.
 - Estimated as €800m to €1b annual revenues.
 - Highly skilled workforce; interchange with other sectors
 - Last survey in 2006 identified 152 organisations.
 - Full industry survey will be made by EARSC during 2012.

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Importance of GMES

- Raise awareness amongst policy makers of the value of space-based observations.
- EO Services industry can bring maximum economic benefit to Europe from the GMES programme by exploiting GMES Core services into new areas:
 - opportunities using GMES products & services in commercial sectors
 - Export of GMES products & services
 - Develop efficient and innovative downstream products & services for EU public customers (and others).
- EO Services Industry has a strong interest in the way GMES will be implemented.





GMES: Key Issues for EARSC.

- Key Issues for EARSC and the industry:
 - Clarity in the market for GMES products and services; how will they be procured? Where will budgets be placed?
 - Clearly defined and understood responsibilities in the public and private sectors.
 - Clear data Policy respecting public and private commitments.

Position Papers:

- Exploiting GMES Operational Services, March 2011
- The Threat to GMES; July 2011
- GMES Data and Information Policy; October 2011





EARSC and GMES Data Policy

- Raw data from Sentinels should be free and open.
- Data from commercial satellite operators should be procured under appropriate license conditions.
- Core services to be freely and unconditionally available to all users and downstream partners.
- Downstream services should be procured commercially on a fair and competitive basis.
- A registration system for GMES users should be put in place to ensure:
 - basic quality conditions are met
 - licensing conditions are respected
 - fair competition on the international market.





Free and Open Data Policy

- GMES is a public programme with the goal to supply public decision makers with critical information.
- Growing trend towards treating public data and information as a public good and move away from cost recovery models adopted by many agencies.
 - Met Offices (eg UK)
 - Mapping Agencies (eg Netherlands)
 - Business Registers
 - GI data with local and national bodies (eg Spain)
- EC studying to have new legislation following 2003 directive on re-use of public sector information
 - POPSIS report provides evidence
 - Directly relevant for GMES





Landsat Data Policy

- Experience of Landsat in the US is directly relevant
- Since 2008, US government opened Landsat data archive for public / commercial re-use.
 - Daily scenes downloaded went from 53 per day (sales in 2001) to 5776 per day.
 - Over 7 million scenes downloaded to date
- Conclude that:
 - Societal value exceeds the cost of the satellite
 - Provides \$100m's of economic value to the US
 - Commercial enterprises thrive on the availability of free images.
- More research is needed into the economic benefits of a free and open data policy

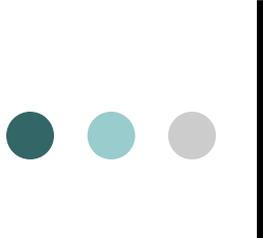




European Policy on PSI Re-use

- Existing EU legislation (2003) encourages PSB's to make data available at marginal cost.
 - However, it is not mandatory and allows them to use cost recovery models including profit
- Recently growing momentum behind open data (OGC etc) and EC will review the situation in 2012 – possible new legislation in 2013.
- POPSIS study in 2011 provides good evidence to support the case to lower charges and improve accessibility,
 - Low revenues from data subject to cost-recovery models
 - Strong growth in mobile market (Apps)
- Reduced entry barriers leads to
 - Very high take-up of data where marginal cost policy is introduced
 - Strong innovation where data is available





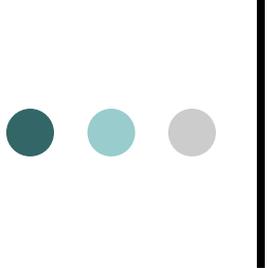
Effects of Lowered Charges

- In those cases where PSBs moved to marginal and zero cost charging or cost-recovery that is limited to re-use facilitation costs only, the **number of re-users increased by between 1,000% and 10,000%**.

Case study	Increase
BEV	Number of datasets sold: 200% - 7,000% increase
DECA	Number of re-users: 10,000% increase Turnover re-users: 1,000% increase
Destatis	Number of unique visitors: 1,800% increase Number of downloads: 800% increase
IGN-CNIG	Volume of data services: 200% increase Number of users: 200% increase
KNMI	Number of re-users: 1,000% increase Turnover re-users: 400% increase
Met.no	Number of re-users: 3,000% increase Turnover re-users: more than 200% increase
Spanish Cadastre	Number of downloads: from 800% to 1,900% increase for various datasets.

- Lowering charges may **attract new types of re-users, in particular SMEs**.
 - This also applies to cases where the price cuts have been less significant (or even absent), but where **special pricing schemes for SMEs** were introduced.

Courtsey Deloitte: Taken from Popsis Report: presentation to the PSI Group Meeting; September 2011



GMES Data Policy Recommendations

- An industrial viewpoint to decision making.
 - EG. a GMES Services Supplier Group alongside the GMES User Group so as to provide a platform for exchange.
- A comprehensive governance arrangement for GMES.
 - an interim governance structure is suggested to be put in place in 2012 with a permanent structure to follow.
- A budget for GMES within the MFF
 - including sufficient funding to ensure the development and supply of the GMES products.
 - Funds to support future research needs into new and innovative products and services.
- A registration scheme for GMES data and products





Developing the Downstream Sector

Recent Reports from Booz and Co and ESPI have highlighted the need for policy makers to give more support to the downstream sector:

- ESPI
 - Enhance financial instruments stimulating the development of innovative downstream Applications
 - Increase development of user applications and services.
 - Ensure data harmonisation and standardisation.
- Booz
 - A key part of realising the potential of the industrial policy goals of GMES is to facilitate the development of a commercial downstream sector of service providers and applications using data supplied through GMES
 - a commercial strategy should be developed for downstream sector development.





The European Service Industry offers strong assets to support GMES services

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