

# EARSC



European Association  
of Remote Sensing  
Companies

## EO Services Industry Ecosystem in Europe

**Giovanni SYLOS LABINI: EARSC VP.**

# EARSC

EARSC is a trade association (non-profit Belgian company), founded in 1989, dedicated to helping European companies: *providing services (including consultancy) or supplying equipment in the field of remote sensing.*

Our mission is:

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

Today: 85 members (75 full and 10 observers) from 22 countries in Europe



# Market development & promotion



OGEO:  
Link with Oil & Gas Industry



EO Portal (wiki):  
Information on Geospatial services



EO4OG: guide to geospatial products for the O&G Industry



Research Corner



eo4All  
Links with IFI's



EOpages:  
Brokerage site



EOmag:  
Sector magazine



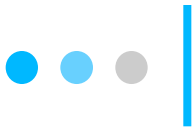
Achievement  
Award



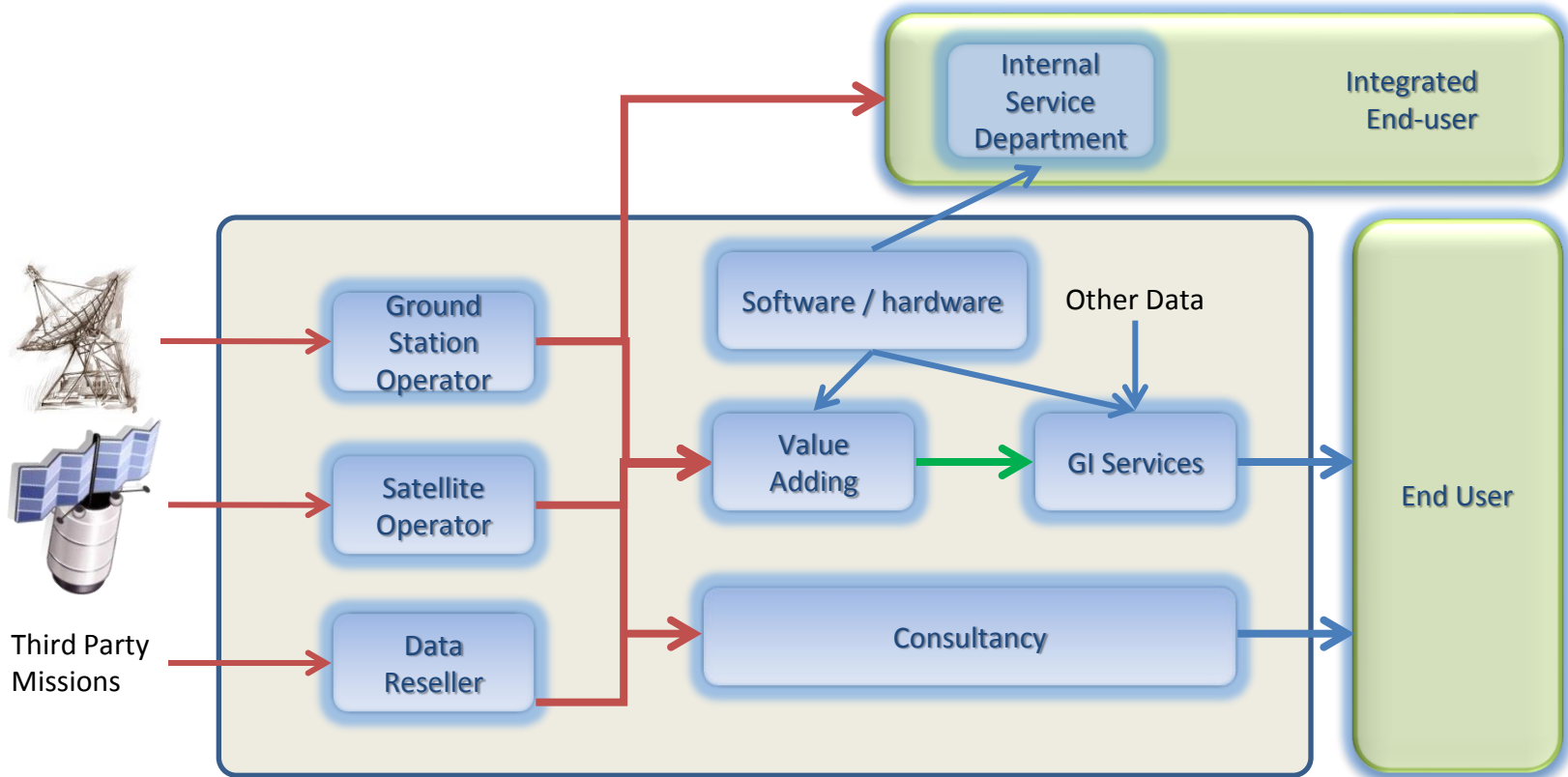
Annual Report



EARSC on Twitter



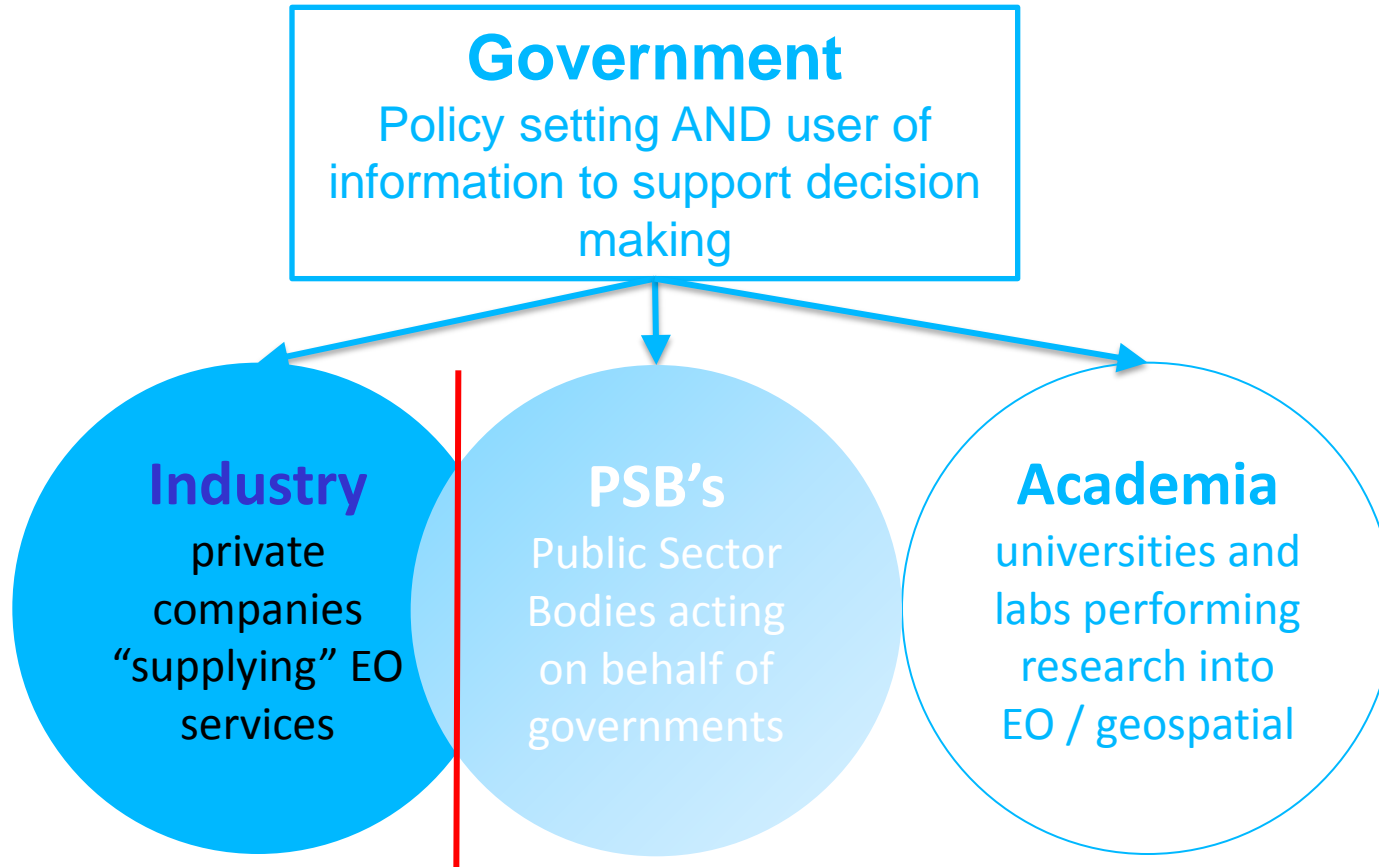
# Value Chain



Services covered by the EARSC survey:

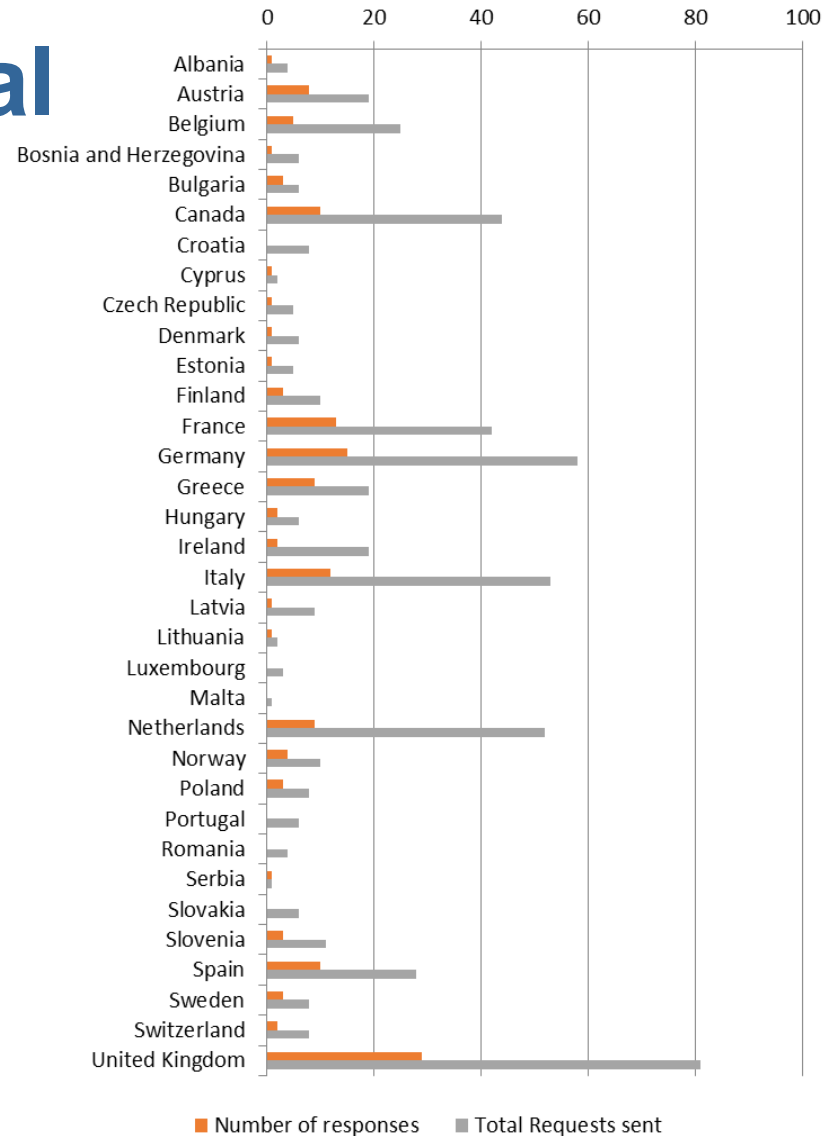
- Satellite data products —
- EO Application Products —
- Geo-information Products —

# EO Service Ecosystem



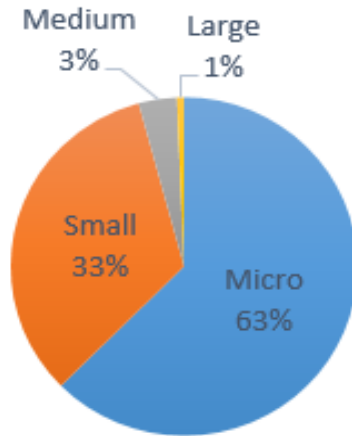
# Geographical distribution

- 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

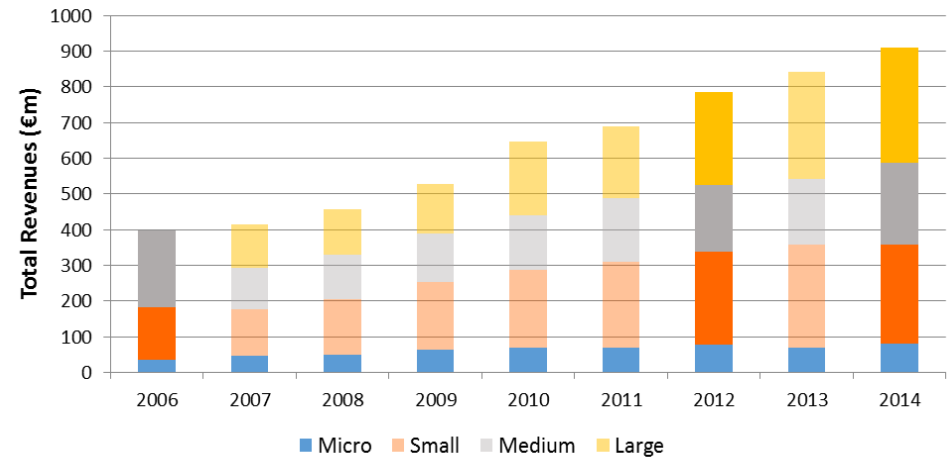
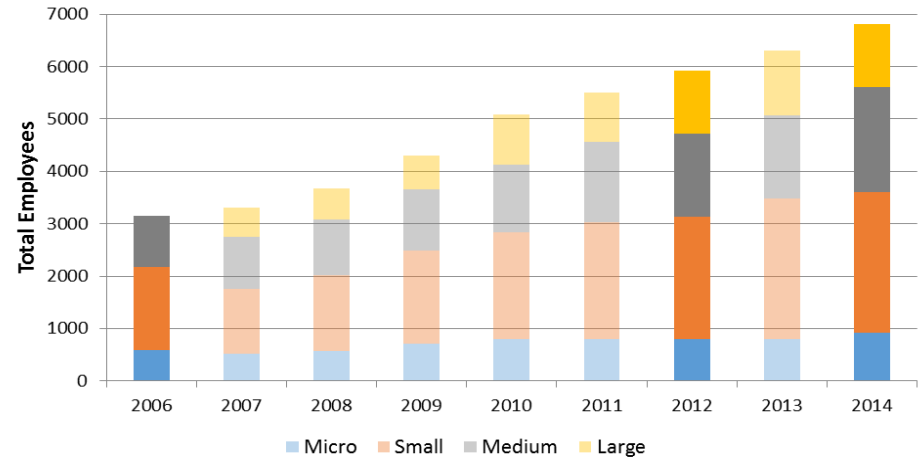


# EO Services Industry Sector Profile

Key Facts : From EARSC 2015 Industry Survey

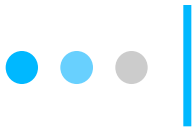


■ Micro ■ Small ■ Medium ■ Large



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



# Percentage Revenues by Activity

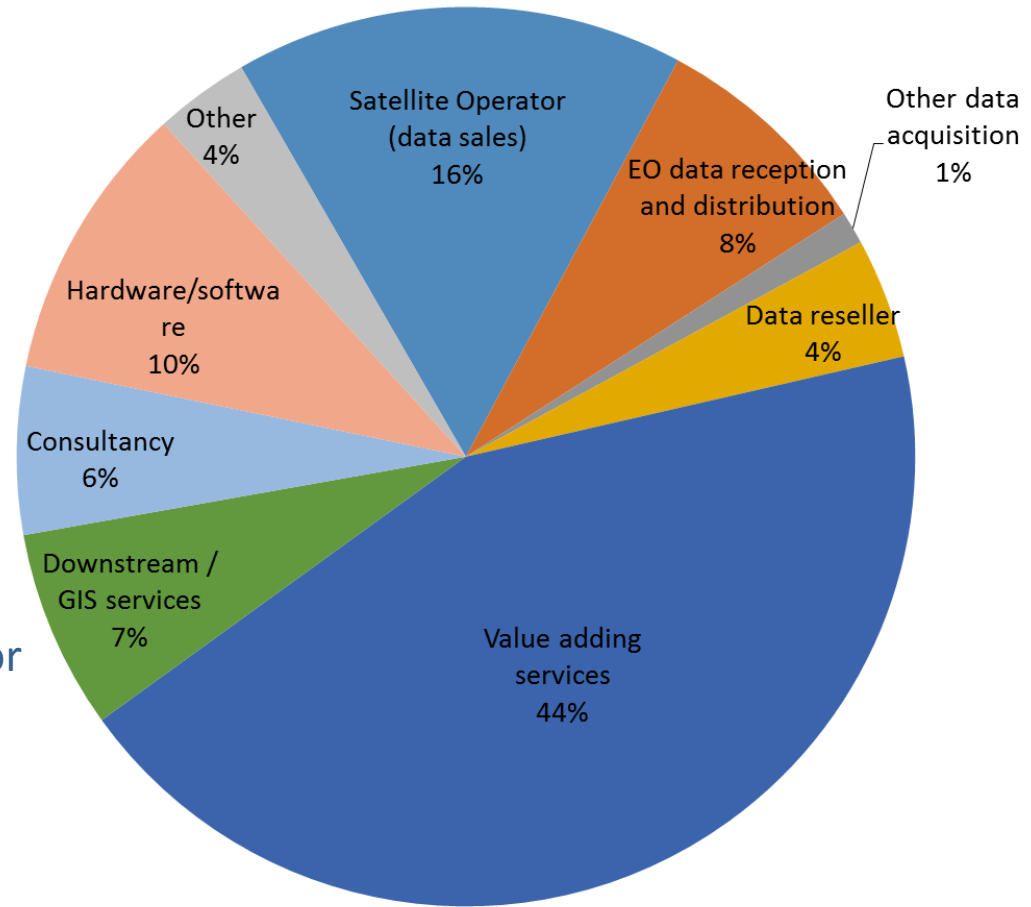
European Companies are active throughout the value chain

Data selling activities represent a 29% share of the market at €270m.

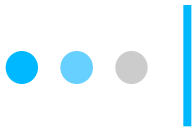
This represents a growth of 5% since 2012

The information services part of the business represents 51% of the market or €462m.

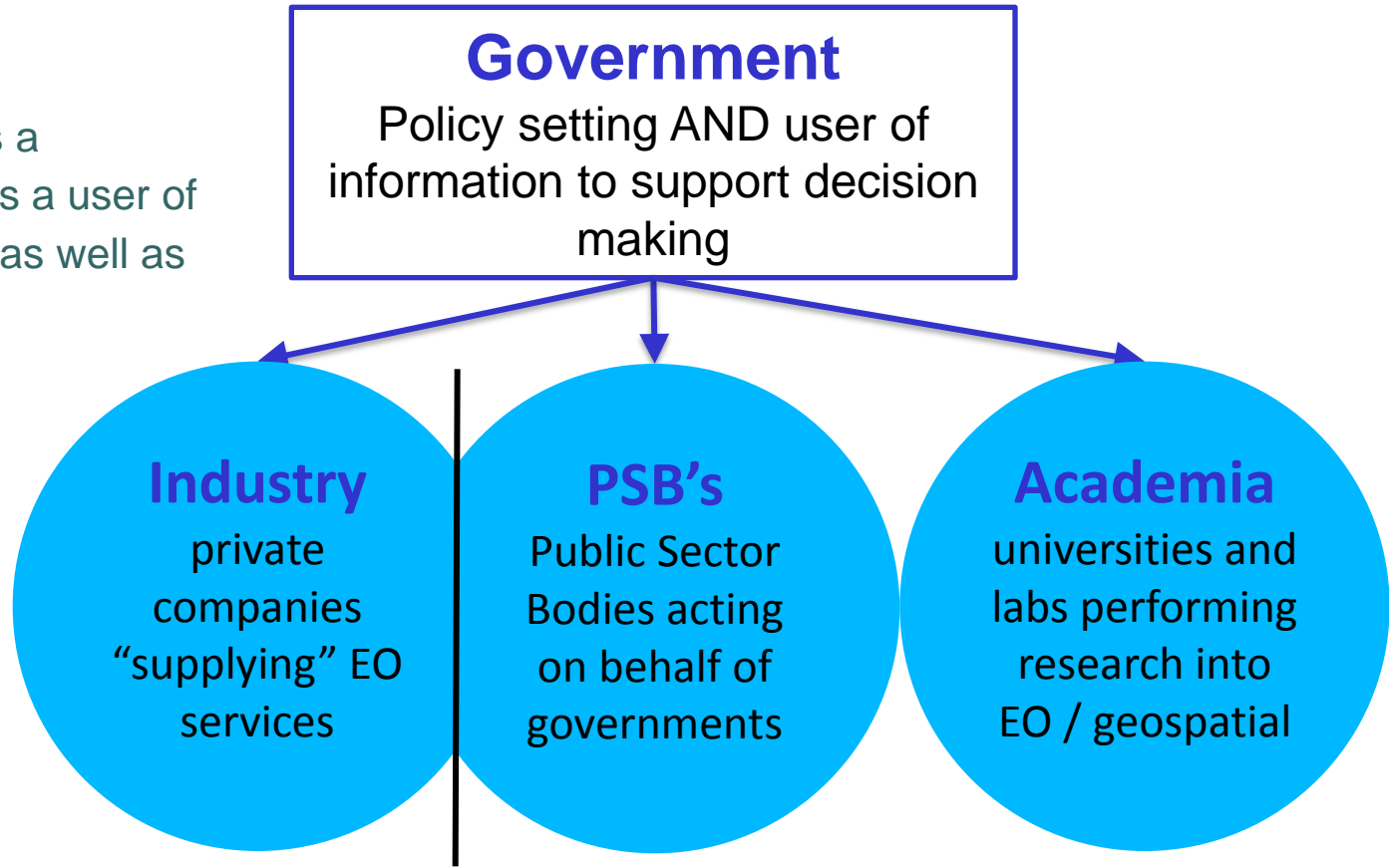
This represents a growth of 72% since 2012 (31% per annum).





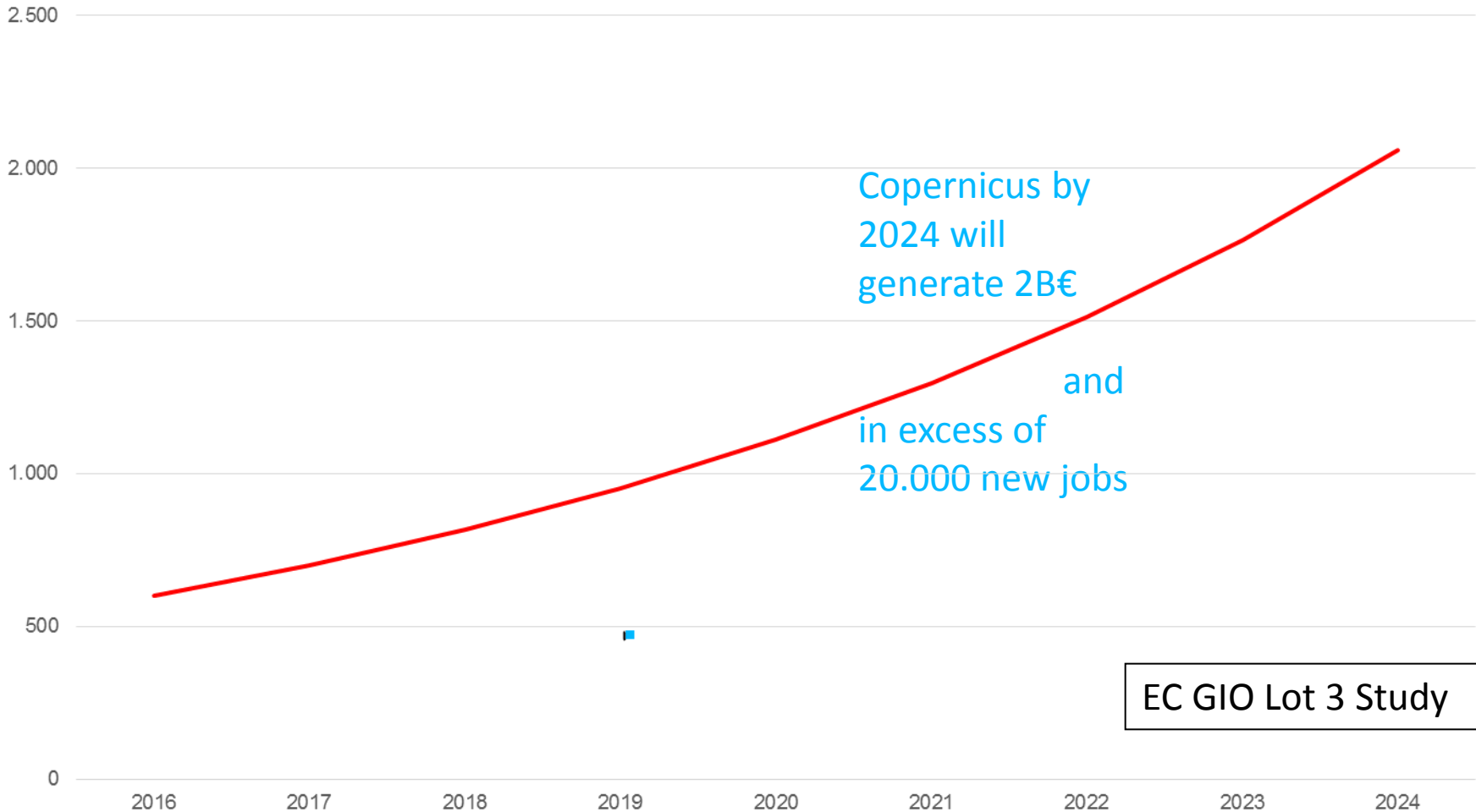


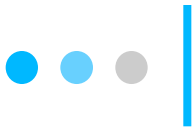
- Government plays a determining role as a user of data / information as well as setting policies.
- Public sector bodies act on behalf of their governments.
- Industry can include internal service departments
- Overlap between public sector bodies and industry causes unfair competition, uncertainty and leads to reduced investment in new products and services



# ●●● | Impact of Copernicus

Estimated Total Addressable Market





# For more Information

For Information on EARSC:

[www.earsc.eu](http://www.earsc.eu) / [www.eomag.eu](http://www.eomag.eu) / [secretariat@earsc.org](mailto:secretariat@earsc.org)

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)