

Copernicus Value Chain Workshop

Several people remarked to me how EARSC was present in strength at the Copernicus Value Chain workshop organised by the European Commission this last week. Indeed, it was a very important meeting for us and the industry and overall, I was very pleased with the outcome.

Industry views were presented by EARSC representatives (from 7 member companies) in each of the 6 sessions; Chetan (vice-chairman) presented in the plenary and others spoke during exchanges. So we did indeed show that the question of exploitation is an important one for the industry.

My key take-aways were as I expressed in the closing session. I was very pleased with the change in language coming from the stakeholders in EC and in ESA. Over the last 12 months this has significantly changed such that the messages we have been delivering for some years now are gaining traction. This is not all good news! As the profile of EARSC is raised the demands for interventions in meetings, for positions on issues and for consultations is growing significantly. Our recent decision to become a participating organisation with GEO is adding to that and we are speaking at their meeting this next week on the proposed work-plan. All of which will force us either to prioritise or to encourage more participation from members – or most likely both.

But back to the workshop, where I was especially pleased with the speech by Philippe Brunet (you can watch it [here](#)). He made all the right points concerning (to take a few): private/public boundaries, industry access to data, the need for federated demand in Europe and the problems with delivering this etc. For the first time, I have the feeling that the needs of industry are being taken seriously. This stems from two sources in my view; firstly the shift in the whole Commission trajectory coming from Commission president Jean-Claude Juncker (as Rudy Aernaudt pointed out) and secondly by the realisation that if Copernicus is to deliver on its promise of more jobs in the downstream sector then action must be taken now. We shall soon (next year) start talking about the next financial perspectives - taking effect from 2021 - which will bring a focus on the results of the Copernicus investments. The Juncker focus on economy and jobs will certainly shine a light on the outcomes of the Copernicus programme, so we need to be acting now.

Other take-aways were the need to invest in internationalisation. For companies to be able to export, they need a reference in Europe. This means that as far as possible companies should be involved in the delivery of the Copernicus services. But for those who are not and for those who generate products which build upon the outputs of the Copernicus services, there is a need for some form of quality scheme which is also one key element of our proposed marketplace Alliance. We seek to develop closer links between the industry and the 7 European Entrusted Entities which have been designated for supplying the services. It would have been much easier for us if there was one responsible agency to interact with rather than 7 but unfortunately this has not proven possible in the past and is unlikely to do so in the future so we shall have to live with it.

In our paper on the Marketplace Alliance, we identify the need for the EO services industry to be given a sustained and efficient access to Copernicus data and information; which was perhaps the core subject of the workshop. Today, the best way for companies to access Sentinel data is through Google or Amazon services. For me it is not a question of geography but of business. The revenues of these two giant IT companies are around \$100billion whilst for those of the average European service provider it is in the range €1 to €10m. Even European IaaS providers are dwarfed by their US cousins but are large compared to the European service companies. Hence, one goal of the Marketplace is to try to rebalance the commercial relationship. European companies can work with international partners – in fact they are excellent at it – and they will no doubt work with one or more of the US giants. But, they should not become dependent on them; hence our position to seek an alternative.

Hence, we found that this workshop was extremely useful to debate around the issues and to sensitise the EC to industry's concerns. It has helped us to form new partnerships and to open new lines of dialogue. I believe that these will be useful over the coming months as we develop further the Marketplace Alliance.