



PREGNANT WITH POTENTIAL

Sentinel-2 is designed to map differences in land cover to understand the landscape, map how it is used and monitor changes over time (©ESA/ATG medialab)

SENTINEL 2 WAS ONLY LAUNCHED A FEW MONTHS AGO, BUT BUSINESSES ARE ALREADY LOOKING FOR WAYS TO USE ITS DATA. GEOFF SAWYER REPORTS ON THE RESULTS OF THE LATEST EARSC INDUSTRY SURVEY

Copernicus is 'pregnant with potential' according to one of the respondents to the 2017 EARSC industry survey. It is why we dedicated a specific section of the survey to issues concerning Copernicus. EARSC conducts the industry survey every two years with the goal of maintaining a picture of the state and health of the EO services industry in Europe. From the more than 500 companies to which the survey was sent, we received 151 responses.

How much is the industry benefiting from the publicly-funded Copernicus programme? It is still early days – it is only a few months ago that Sentinel 2b was placed in orbit, joining its sister satellites Sentinels 1a, 1b and 2a. Nevertheless, some increase can be perceived as around two-thirds of companies are already using Sentinel data, half of these using the information from Copernicus services.

Copernicus data is available on a free and open basis – a policy which is expected to drive innovation and uptake amongst small companies and entrepreneurs. So how much business is being done?

Companies were first asked how much of their revenue was driven by participating in the Copernicus programme and how much came from Copernicus data and information?

Their responses showed that some €85m was coming from the programme directly, while €92m is driven by Copernicus data and information. At first sight, this suggests that €7.5m is coming from exploiting the Sentinel data and the Copernicus services. But the figure of €85m includes some revenues from infrastructure and consultancy studies – some of which is from national programmes.

Taking this into account, we consider that €27m of the sector revenues is coming from the use of Copernicus data and information. Most will be from Sentinel data, as the sector is more mature in this respect compared to the use of Copernicus information.

Interestingly, there seem to be many research projects that could soon mature, leading to a much larger benefit from Copernicus.

However, no figures are available to understand how much of the €27m comes as a result of R&D funding.

How much of these revenues are coming from EC Copernicus budgets? From our knowledge of the companies that responded, we estimate that around 50% of the direct Copernicus revenue is coming from data sales (contributing missions) and around 10% from other activities linked to consultancy or software. This leaves a further 10% coming from national sources, meaning that industry is getting around €25m from Copernicus services. The EC budget last year was €122m, so the industry is contracted for around 20% of the total value of contracts for Copernicus services.

Of the 35 responding companies participating to the programme to deliver Copernicus services, the largest number (22) are contributing to the land service, with the second highest number contributing to security (17). Unfortunately, the EC has yet to produce top down figures for the number of companies involved in the sub-contracting chain for us to be able to make a comparison.

This is also reflected in the interest to exploit the information coming from the services. By far the strongest interest (>55%) is in the land service, reflecting many small companies' responses, followed by 13% in marine, 9% in emergency and around 6% in others.

Reflecting that initial statement from a survey respondent, companies are very optimistic about the potential for Copernicus – more so than at the time of the previous survey two years ago. With the advent of better access through the Copernicus Data and Information Access Service that is shortly to be established, this optimism stands a good chance of turning into real business. Copernicus is seen as a powerful tool and the industry is looking forward to its playing a stronger role in the future.

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