

FREE AND OPEN EO



SHOULD PEOPLE HAVE TO PAY FOR EARTH OBSERVATION DATA? AND IF THEY SHOULDN'T, WHERE DOES THAT LEAVE EARTH OBSERVATION COMPANIES?

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Back in July/August issue this year, *GeoConnexion* columnist Alistair Maclenan took the US Department of the Interior (DoI) to task for contemplating a change in its Landsat pricing model. Just as the original Rosetta Stone had been utterly useless until it was dug out of the Egyptian sand, Alistair pointed out, "Landsat's true value has only been realised by opening up its archive and getting people hooked on its use."

In 2015, a team of economists from Colorado State University and the USGS Fort Collins Science Center estimated that the US economy had benefitted to the tune of US\$1.8 billion in 2011 from the 2.38 million Landsat images freely downloaded that year. "Charging \$100 a scene would result in an efficiency loss of \$37.5 million a year," they calculated.

So far, so obvious. Free is good, it seems.

Certainly, the sheer number of new Earth observation (EO) constellations launched since then that are giving away their data seems to back that up. The most famous of these is probably the EU's Copernicus Sentinel mission. EARSC's Geoff Sawyer has also documented in his column this year the advantages of free Earth observation data, based on the results of EARSC's own market research. In our March/April issue, he suggested that free was a good thing – for some at least: "Copernicus and the initiatives that surround it have stimulated a strong innovative culture, so there are many

'green sprouts' of start-ups, new entrepreneurs and spin-offs in Europe."

Indeed, what the beneficiaries of free virtually all have in common is that they're either new or small companies – 'new' reaps the benefits because it gets corresponding low start-up costs and can quickly acquire a large customer base, while 'small' can more easily 'pivot' to adopt new business models. The biggest providers of free also tend to be governments, who don't need to worry about profits and charging models.

What, though, of the existing large private-sector market players? Those that have been around for years, invested in their own (expensive) constellations and have based their entire operations around selling their data? How will they compete when the public sector and the new kids on the block are literally giving their products away? Will there be losers from free as well as winners – and will those losers be the big industry names we're all familiar with?

Not necessarily. In our cover story this issue, we interviewed Adrian Zevenbergen, managing director of European Space Imaging. He seems positively upbeat about the arrival of free and his company's ability to compete. How? Expertise.

You can find out more on page 28, while seeing some of the results of other companies' EO expertise on pages 24 and 26. I hope you enjoy the issue. See you in 2019!

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