



# COMPETITIVE ADVANTAGE

*GEOCONNEXION INTERNATIONAL* SAT DOWN WITH **ADRIAN ZEVENBERGEN**, MANAGING DIRECTOR OF EUROPEAN SPACE IMAGING, A GERMAN COMPANY THAT HAS BEEN DOWNLOADING, PROCESSING, ANALYSING AND SELLING EO DATA SINCE 2002, TO SEE HOW THE EARTH OBSERVATION DATA MARKET IS CHANGING AND HOW EXISTING COMPANIES ARE PLANNING TO ADAPT TO NEW ARRIVALS

Space is becoming crowded. It seems not a day goes by without an announcement that another new constellation of Earth observation (EO) satellites is being planned, built or launched into orbit to provide yet more images of the planet's surface.

The remarkable increase in the supply of EO data, combined with the transformative application of machine learning and artificial intelligence to speed up the conversion from image to insight, led EuroConsult to predict that the EO data and services marketplace will be worth US\$8 billion by 2026.

So far, it's good news for new entrants into the marketplace. But with increasing competition and most new data being offered for free, how will the established, large EO data suppliers compete in this new and disrupted marketplace?

**GC: Are the recent changes in the EO data landscape a threat or an opportunity for European Space Imaging (EUSI)?**

**AZ:** Of course, I think they are both, but I am much more excited about the coming opportunities than I am worried about the threat. In every marketplace, customers will always want and need the best products available to get their work done. European Space Imaging, in partnership with DigitalGlobe, support companies and governments with the best EO products: the highest resolution data – 30cm on the ground – is unique in the marketplace; we have the largest archive of imagery, which spans almost two decades and covers billions of square kilometres of the Earth's surface; and there are the analysis skills of our partners. All this adds up to the best EO service people can buy.

**And it is that quality that will keep you ahead of the growing competition?**

Yes, just as you see with quality suppliers in other marketplaces. You see companies grow, diversifying and changing their offering, but ultimately customers must know that they can rely on a supplier. It isn't just about the quality of the data. They need to trust that we will make delivery on time, that our people – we have nearly 30 people dedicated to customer support and operations – know what they are talking about and can support them with advice and expertise. Sixteen years in this business proves that we can do that.

**The Copernicus programme of satellites, specifically Sentinel-2, is now producing huge amounts of EO data and making that information freely available. How**

**can that be good news for commercial suppliers?**

If more organisations around the world know about and understand the benefits of using EO data in their daily work, that can only be good news for all suppliers. Copernicus has opened a lot of people's eyes to what EO can do and as people become more knowledgeable, they start to want to do more, to see more, to understand more. Our data allows them to do these things. So, as the entry-point, free data is great for everyone.

**Your data is complementary to that coming from Copernicus?**

Absolutely! Take for example the recent problems in Cape Town. This situation highlighted just how important understanding water availability and supply is to people. Our partner, DigitalGlobe, effectively automated the creation of worldwide water surface layer maps using Sentinel-2 satellite imagery. By overlaying very high-resolution data with free open source data, a unique viewpoint was created that combined a macro-view with high-resolution insights.

**You mentioned insight. Is that becoming maybe more important than imagery?**

Insight is the significant end-product of using EO data. Without it, you are just selling pictures of the Earth's surface. Take our client, the European Maritime Safety Agency (EMSA), as an example. They integrate our imagery into national oil spill detection programmes and that combination has created insight for ship operators about new regulations and monitoring capabilities. The end result has been a reduction in the number of spills. Good news for the planet and us, as we have just signed a new four-year contract with EMSA!

Another great example of imagery creating insight can be seen through our contributions to the EU's common agricultural policy. This



Agricultural fields in Poland captured with Worlview-2 contributing to the EU programme Controls with Remote Sensing © European Space Imaging

supports farmers to improve agricultural productively so that consumers have a stable supply of affordable food, whilst tackling important issues such as climate change and sustainable management of natural resources. Since 2003, we have been enabling the EU member states to monitor crops, map plot sizes accurately and distinguish crop varieties, to ensure the best outcome for everyone.

**Government bodies are not the only market for EO data, though, are they?**

Certainly not. More industries are recognising the importance of EO insight. Economists and financial organisations now use high-resolution imagery to better understand retail performance, the levels of energy reserves or



Istanbul airport © European Space Imaging

agricultural crop yields. Being able to provide EO insight is key to the future of this market and the greater the resolution of that insight, the better the results will be.

**So, even though the number of EO suppliers keeps growing, you see a bright future for EUSI?**

I really do! European Space Imaging is perfectly positioned for future growth. With our combination of the highest resolution data, a historically extensive archive of imagery and the capabilities of the team, I see us leading the way in this new marketplace.



The Hassan II Mosque in Casablanca, Morocco © European Space Imaging

