Copernicus ECOSYSTEM WORKSHOP 2018
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Copernicus: leveraging Europe's industrial leadership in EO

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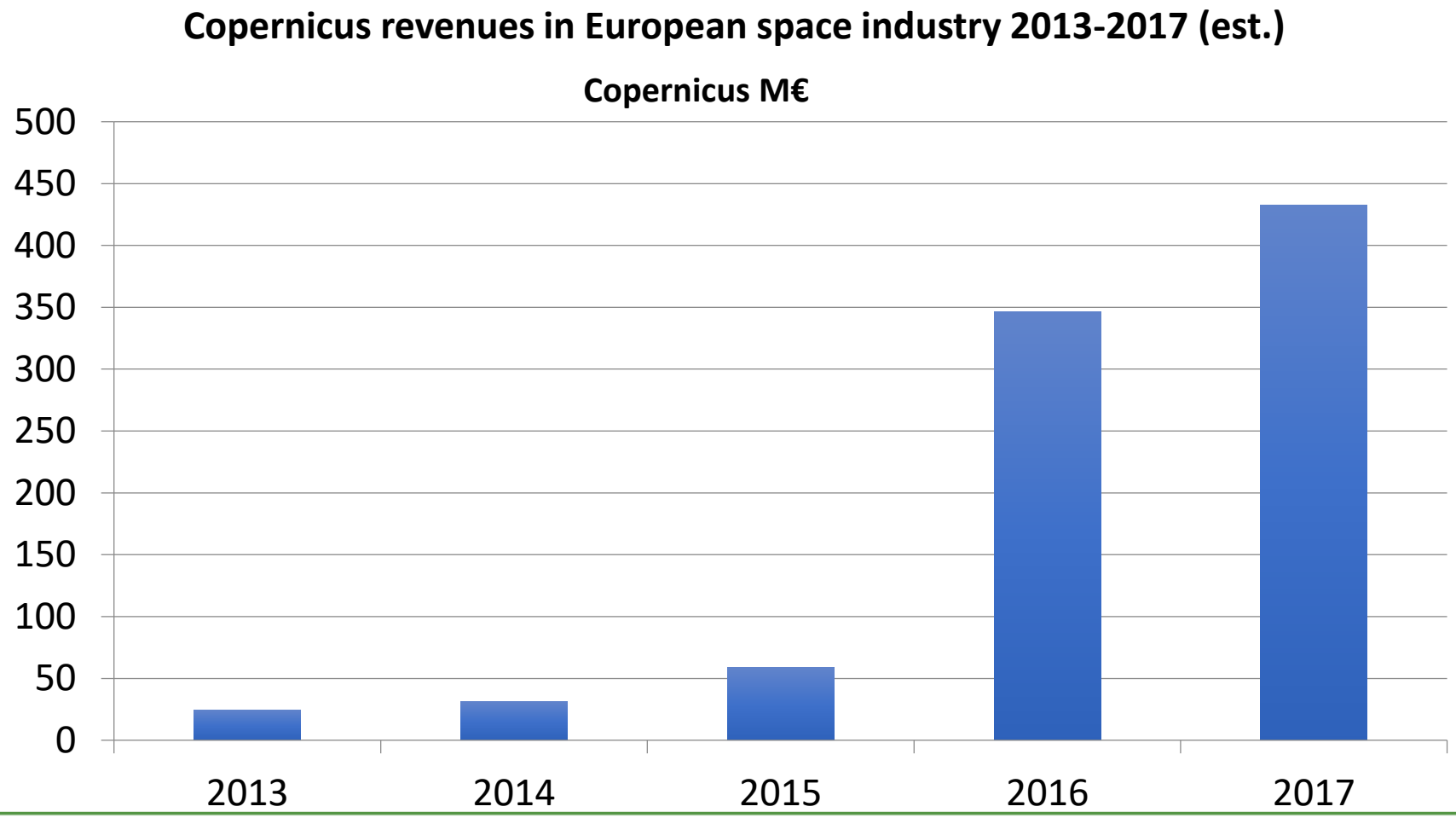
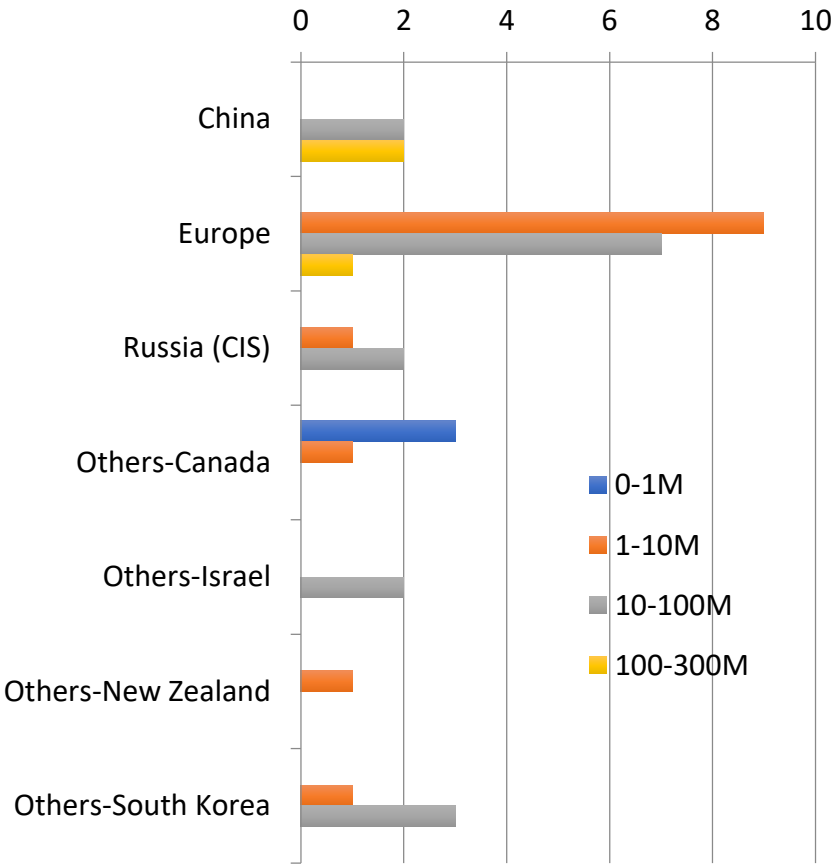
Copernicus: perception of industry

Copernicus: a generator of revenues for the European space satellite industry



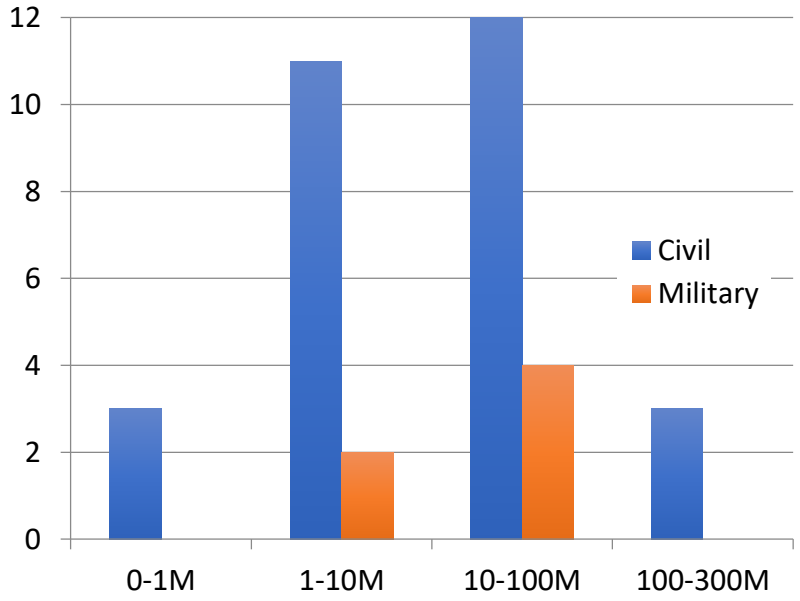
The European leadership in EO Exports

Remote sensing segment exports: suppliers' (decadal) perspective



- European suppliers lead the RS Exports segment by far (50%).
- Interestingly the other 'big players' have less presence on this market, and the USA is notably absent.
- In this market we see the emergence of export markets for smaller players (S. Korea e.g.)

Remote sensing exports by customer type and SC value class



- The RS mission segment for exports was worth 1B$ in the decade (for 35 SC launched), i.e. about 100M$/year
- The RS mission segment has a civil component (84% in value) and a military component (16% in value)
- This segment is almost 100% composed of governmental customers
- Foreign policy and export regulations have a strong influence on this segment
- The segment may involve a technology transfer or 'barter' dimension

European EO manufacturing industry: the driving factors of a transformation

A technological (and digital) transformation

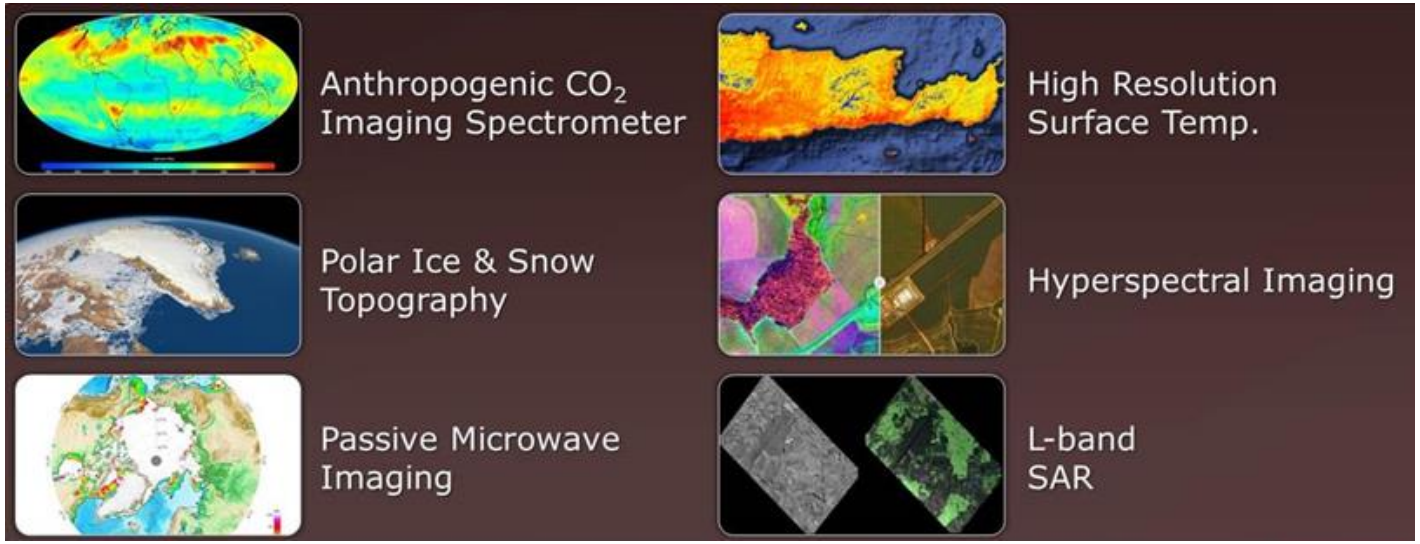
- Constellations of small/ medium satellites
- Very High resolution Observation (including in GEO), new sensors
- More synergies with IT technologies in ground segment and operations
- Digital transformation of industry enabling to provide more efficiently valuable information products
- Going in the direction of “federated systems”: a promising trend to improve processing techniques

Increased pressure of competitors

- Investments of competitors in EO capacities (e.g, China, South Korea, Japan, Israel)
- New investments with a “traditional” objective: ensure independent access to imagery and to develop domestic industry

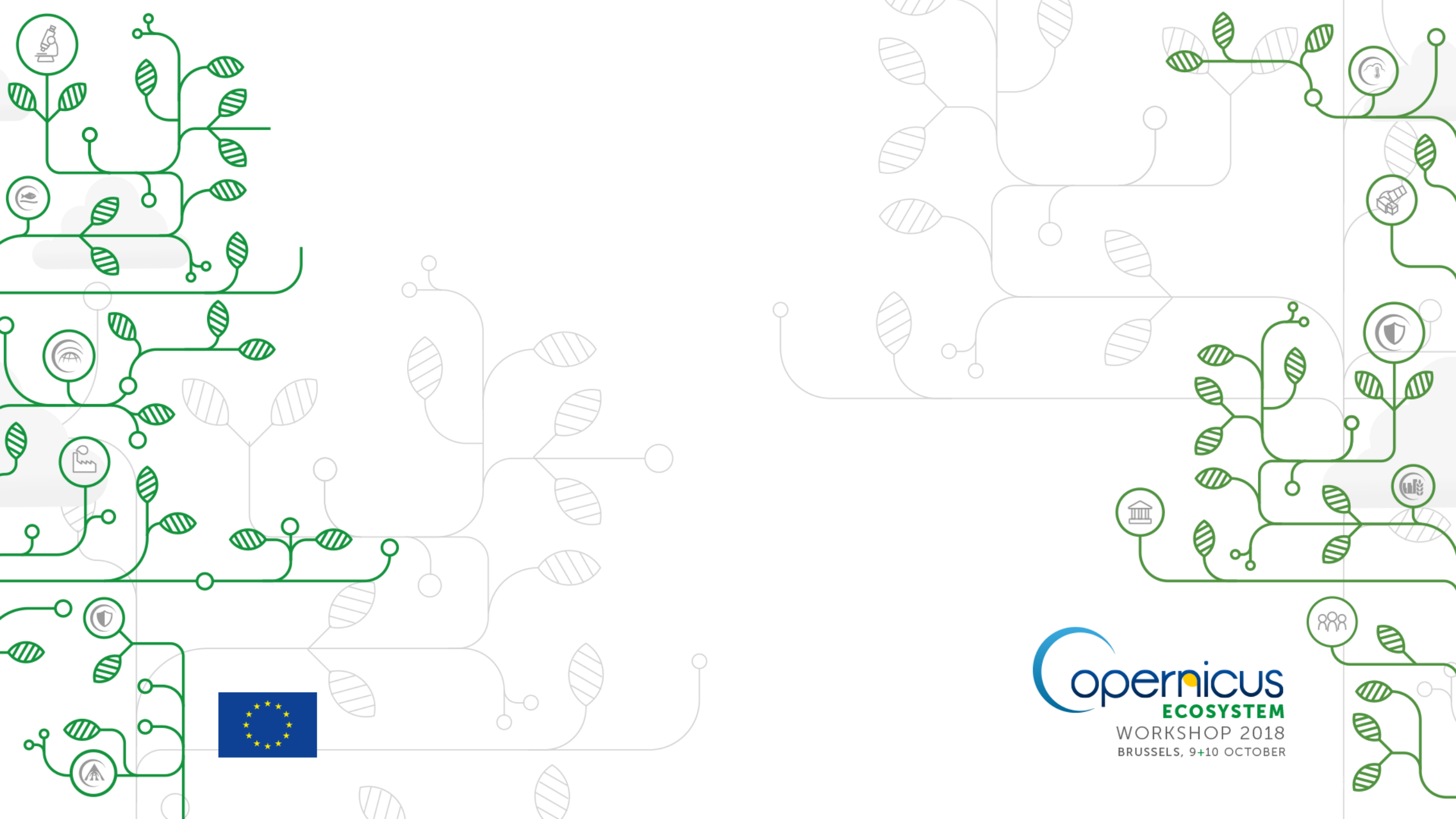
Some perspectives for Copernicus evolution

- Ensure continuity and increase the robustness of the existing Copernicus space component in the future
- Increase the quality and quantity of the existing measurements
- Expand observation types according to policies and user needs: towards "Copernicus 2.0"



Reflections on Copernicus-related industrial policy tools

- Support to research & innovation
- Maintain the public dimension of Copernicus' space infrastructure
- Make a better use of procurement policy
- Ensure the security of the programme: a parallel priority



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