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Author: Mrs. Alessandra Vernile
EURISY, France

THE DEMOCRATISATION OF EARTH OBSERVATION: A REVOLUTION FOR THE
DOWNSTREAM SECTOR? POSSIBLE MEASURES TO SUPPORT A DEVELOPMENT OF THE
DOWNSTREAM SECTOR IN LIGHT OF NEW SPACE TRENDS.

Abstract

New Space trends are shaping the space sector. Even if space activities are still largely governmental driven, the entrance of space start-ups, Small and Medium Enterprises (SMEs) or ICT companies in the market, is rapidly moving the focus of space activities and investments towards a commercially driven perspective. We can talk about space democratisation, a definition that implies not only that space needs to be accessible and affordable to everyone, but that everyone has to have more access to satellites. Some of the new entrants in the sector are putting this aim as central in their missions. New Space revolution is strongly impacting on the Earth Observation market. This market is profoundly changed since 1972, when LandSat 1 was launched and the first privatisation attempt of this programme failed. Over the past years, the number of Earth Observation satellites in orbit increased exponentially (+66). While the upstream sector is adapting so fast to the New Space paradigms, also the downstream sector needs to change accordingly. We can assume that from 1972 to today, the activities related to space-infrastructures and services exploitation, as well as the end users, evolved. Following the rapid shift of the space sector from mostly governmental driven to commercially driven, the downstream sector needs to evolve accordingly. The question is how much New Space is driving changes in the downstream sector? The implementation of governmental policies to regulate the use of space imaging, the licensing of the images and their availability, represent an important step. But what's next for the downstream sector? The paper explores the development of EO market in relations to New Space, while exploring the possibilities of adopting a user oriented/applications driven approach to help the upstream sector to meet users' needs through dedicated measures and new business plans.