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MARKET CONSOLIDATION IN THE EARTH OBSERVATION SECTOR

Abstract

The recent years have seen an increase in mergers and acquisitions among small, medium and large enterprises active in the EO sector. Satellite operators, EO data suppliers, and value-added service providers are part of movements within the commercial space market that have led to a number of mergers and acquisitions. This paper examines whether the transactions that took place in the wider downstream sector during the past decade, and especially during the past five years, signify a high market concentration or whether they represent the need to adjust to their contemporary demand for EO data and services. On that basis, it assesses whether the current consolidation of the EO market can reach an economy of scale and to what extent further consolidation may affect access to and dissemination of EO data. The analysis includes reference to competition laws in the EU and the US, different types of mergers and acquisitions, as well as the features of special purpose acquisition companies (SPAC).