



The Hague  
Centre for  
Strategic  
Studies



# EARTH OBSERVATION ON THE MAP opportunities for NL

See our report  
[Aardobservatie op de Kaart](#)

Geospatial World Forum 2016  
Michel Rademaker  
Rotterdam, 25 May 2016

# OBSERVATIONS EO SECTOR NL

## Supply side

- Strongly developed upstream segment
- Downstream segment is dispersed

## Demand side

- Demand and policy development stay behind
- There is potential will to invest

# NEED FOR DEVELOPING EO SECTOR

- Strong growth # countries that develop and launch satellites, especially emerging economies
- #platforms increases: smaller and cheaper
- Quality sensors still increases
- Data & information need growth → demand EO on the rise

And:

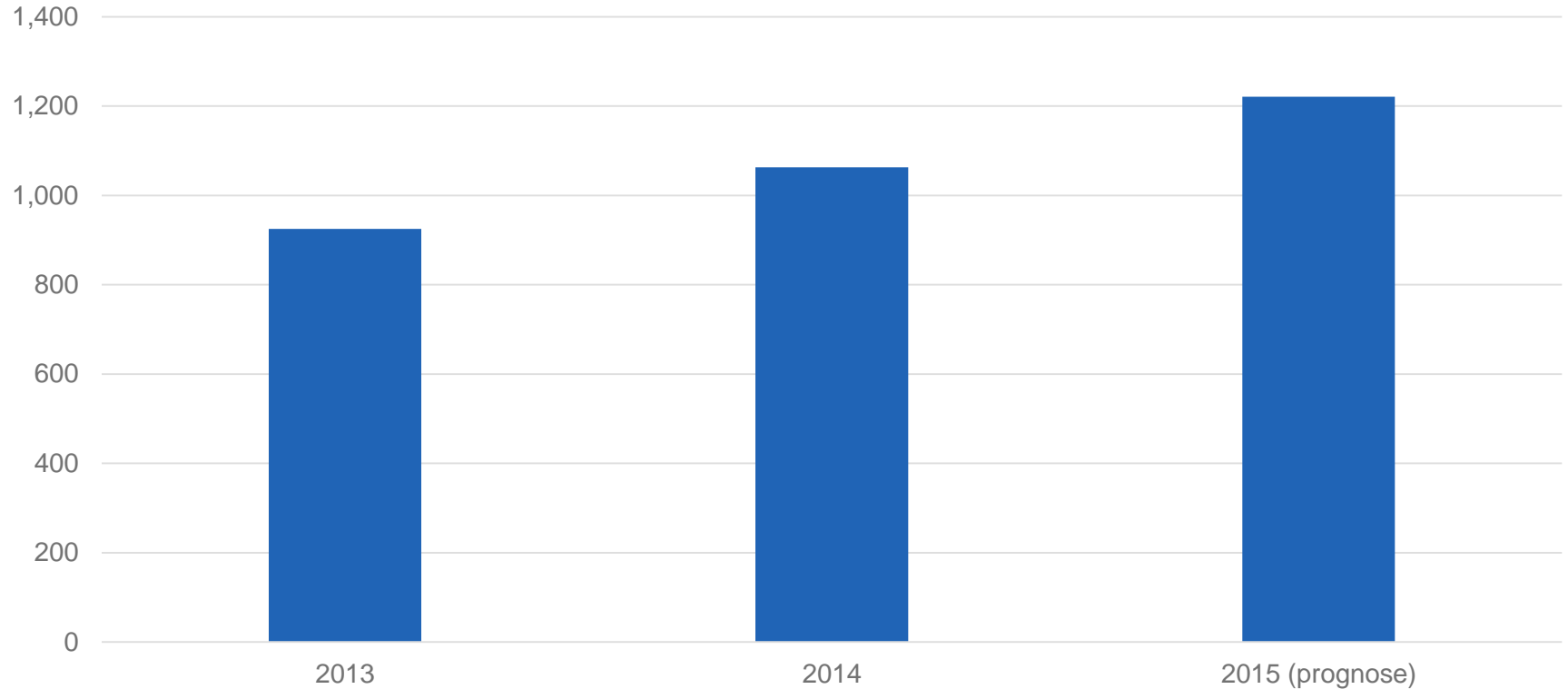
- Downstream segment more important
- Commercial parties play bigger role
- Potential market for Defense and Security applications

# INTERNATIONAL MARKET NUMBERS

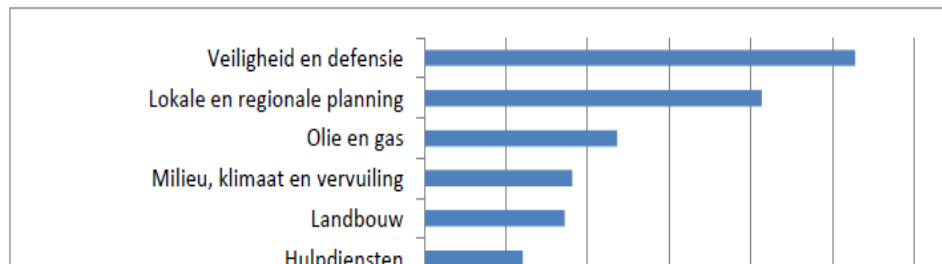
- World wide market volume EO downstream (value added/services) 2014: 2100 Beuro
- Growth expectations 2024: 4200-4800 Meuro
- EO downstream information services
  - EUR 842 Meuro (2014)
  - Growth 10,7 %

# EO UPSTREAM SECTOR EUROPE

## turnover in Meuro's



# Potential of Themes



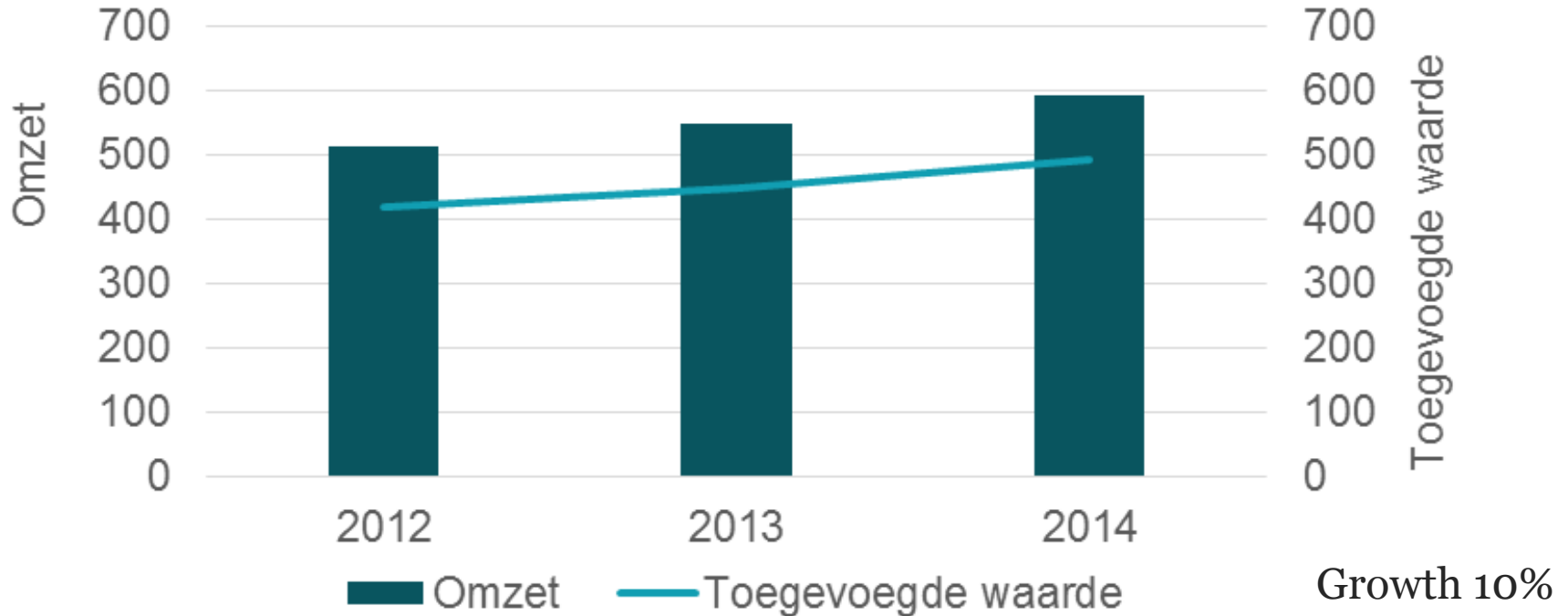
Start programming

A lot of  
unexplored  
potential still

Security & Defense as  
catalysts

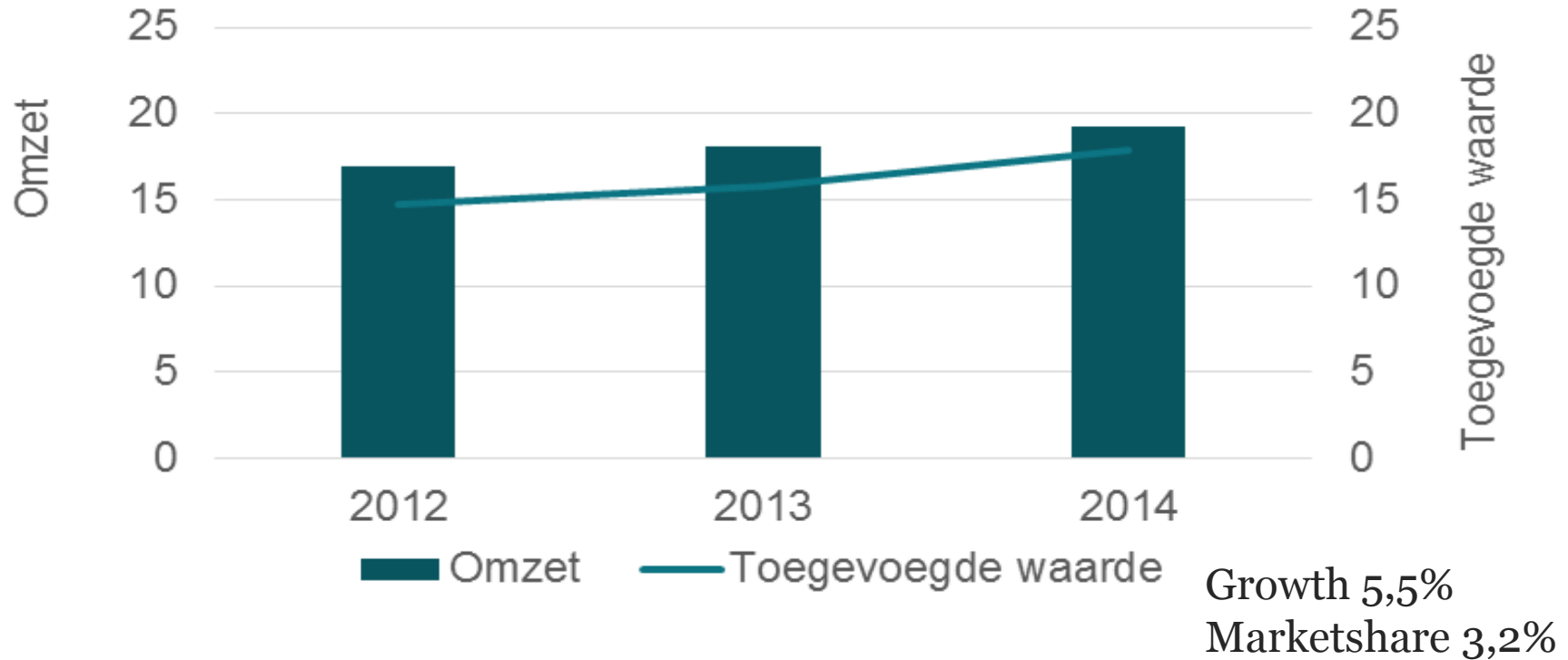
- Early warning
- Mission planning and execution
- Humanitarian missions
- Predictive policing
- Monitoring of migration
- Border control
- Enhanced forensic research
- Maritime security

# EO DOWNSTREAM SECTOR EUROPE turnover & added value in Meuro's



# EO DOWNSTREAM SECTOR NL

## turnover & added value in Meuro's





# CONCLUSIONS EO MARKET NL

- Total around 50-55 Meuro
- Average growth coming years 9% te zijn (Euroconsult)
- Growth NL lacking behind Europa. Average 7,8%
- Sector operates in broader ecosystem
  - Space upstream market, turnover NL van 178 Meuro (2015)
  - Downstream sector turnover NL van 1400 Muro (2014)

## HOW to handle?

- Make the sector more visible (location)
- Enhance synergy effects (chain approach)
- Consolidate supply toward big users
- Enhance competition power NL EO sector  
Identify subsectors with growth potential  
(programming)

# NL Report downloadable

<http://www.hcss.nl/reports/aardobservatie-op-de-kaart/199/>

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