

Start-up Survey 2021

EARSC Secretariat



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Executive Summary

- This report presents the results of the **2021 start-up survey for companies in the European EO services sector**, to which **43 start-ups from 16 countries responded**. The survey was conducted in conjunction with EARSC's annual industry survey for the sector.
- **Value-added EO products and services is the most popular primary service (60%)**. Within this, most companies offer a **per-use fee basis**, although subscription, freemium and bespoke business models are also in use.
- The sample was **equally split on profitability** (~42% each); almost **half had 2019 revenues up to 50K***. **Agriculture, Environment and Urban** are top market segments (42%)*, with **Industrial and Local/Regional Authorities the main customers targeted**.
- **Around 45% are technologically market-ready**; even rather young start-ups (e.g. from 2019) have rather advanced products.
- **Almost half of respondents rely on Copernicus** for their business to run or for competitive advantage. An estimated 1,1 Mn EUR in revenue depends on Copernicus. **Sentinel data powers 73% of respondents' businesses**.
- Almost **60% were initially funded by R&D projects or grants, and some 65% have raised additional funding**.
- The top operational barriers are **market and user acceptance (20%), finding new customers (17%) and lack of funding for development (15%)**. Lack of VC funding does not appear to constitute a major barrier, nor does operational data supply. Some 32% of responses appear to share a root cause in unconvincing or ineffective sales tactics.

Introduction

This report, **Start-up Survey 2021**, presents the results of the **start-up survey for companies in the European EO services sector**.

This is a dedicated survey which was conducted as a sister activity to EARSC's annual **Industry Survey 2021** for the sector, and constitutes a deliverable of the SEBS study for the European Space Agency. The two surveys were launched in parallel, with a common set of core questions.

The start-up survey was issued to all those companies in the EARSC database which were 5 years old or less (i.e. formed in 2015 or later). A total of 47 replies were received of which 43 were valid.

Throughout this report, the results are contrasted both with the main Industry Survey and with a (somewhat broader) SEBS study, **Innovation and Start-ups Survey 2019**. The latter looked at a wider innovation ecosystem which included pre-commercial activity (e.g. competitions, projects, informal groupings) as well as established legal entities such as start-ups and SMEs.

See [Background](#) for more details on the relationship between these studies.

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Methodology (1)

Building the database:

- At the heart is our database of companies that is maintained on a constant basis to add new ones as we find them and remove any which disappear through merger or failure.
- Public sources are scanned and monitored for new companies; workshops and conferences, accelerators, ESA BICs, members news, trade journals etc.
- Companies with a legal entity in Europe selling services based on EO data are included.
- 32 countries are covered, comprising EU and ESA member states.
- Each company has been validated through the national companies register, which also provides the date of formation.
- The company website is reviewed for confirmation that its business includes the sale of services which are based on the use of EO data. Where companies are involved in various parts of the value-chain, this data is noted where possible.
- Companies formed in 2015 or later are extracted to be asked to respond to the dedicated start-up Survey.

Scope

- Companies offering services or supplying (selling) data or information using satellite (EO) data.
- Companies formed in 2015 or later i.e. 5 years old or less.
- Private legal entity in an EU or ESA Member State.
- Survey conducted in 2021 collecting 2020 data.
- Where EO services are only a part of the business model, the proportion of employees linked to this part of the business is determined as far as possible.

Methodology (2)

Data Collection and preparation:

The data is collected through a series of steps.

- Our overall company database is maintained on a constant basis; see Industry Survey 2021 for more details.
- Companies formed 5 years ago or less – since 2015 – are extracted from the database and asked to respond to the start-up survey
- The data is examined and any perceived anomalies cross-checked to correct false results.
- Data is gathered from public sources and applied to the database. This is updated where companies respond to the survey.
- Companies are classified according to their number of employees. The different categories are shown in the table above.
- For those companies with no revenue data, we calculate an average revenue per head for the different classes of companies.
- For those companies with no employment nor revenue data, we distribute them according to the distribution in the main dataset over micro and small companies and apply average revenues per head.
- Data is consistency checked between each of the surveys.

Class	Employees
One-Person Company	1
Micro1	2-5
Micro2	6-10
Small	11-50
Medium	51-250
Large	>250

Value Chain

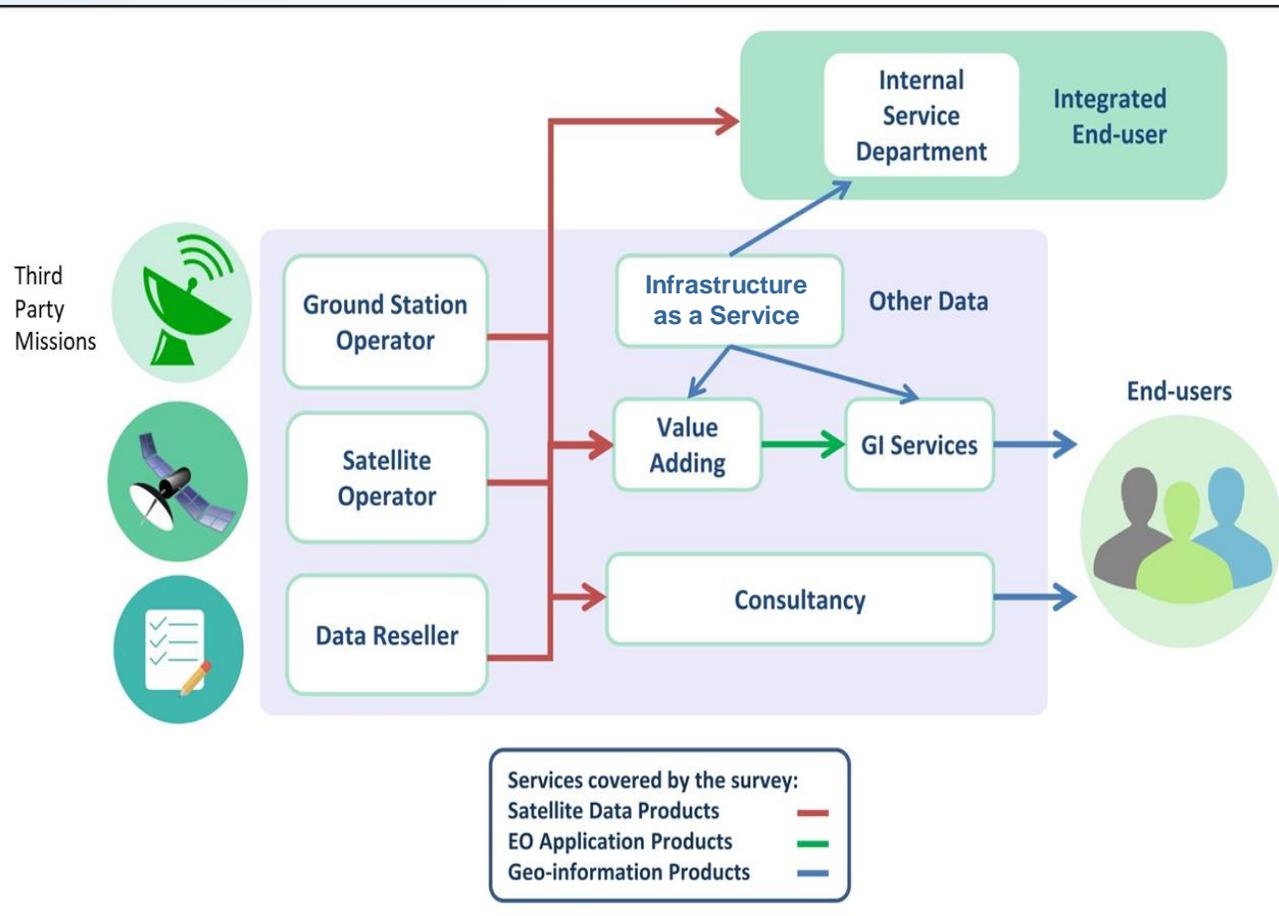


Figure 1. Definition of companies included in the survey (inside the grey box)

The value chain defines the scope of the businesses included in the survey.

- Satellite data and value adding services form the core of the value chain.
- GI Services covers companies whose focus is on other sectors but where EO data is used to meet customer needs, such as an agriculture services company using EO.
- Software revenues are included in the core value chain where they arise i.e. Value-added or GI Services.
- Consultancy is regarded not as covering the delivery of EO services but supporting the ecosystem (i.e. studies for ESA/EC).
- Infrastructure as a Service (IaaS) is included for the companies offering cloud or processing services.
- Internal service departments where a company in a different sector (e.g. O&G) has an internal unit delivering EO services information to other parts of its business, but is not selling EO services to others. They are not in the scope of the survey.

Who responded to the survey?

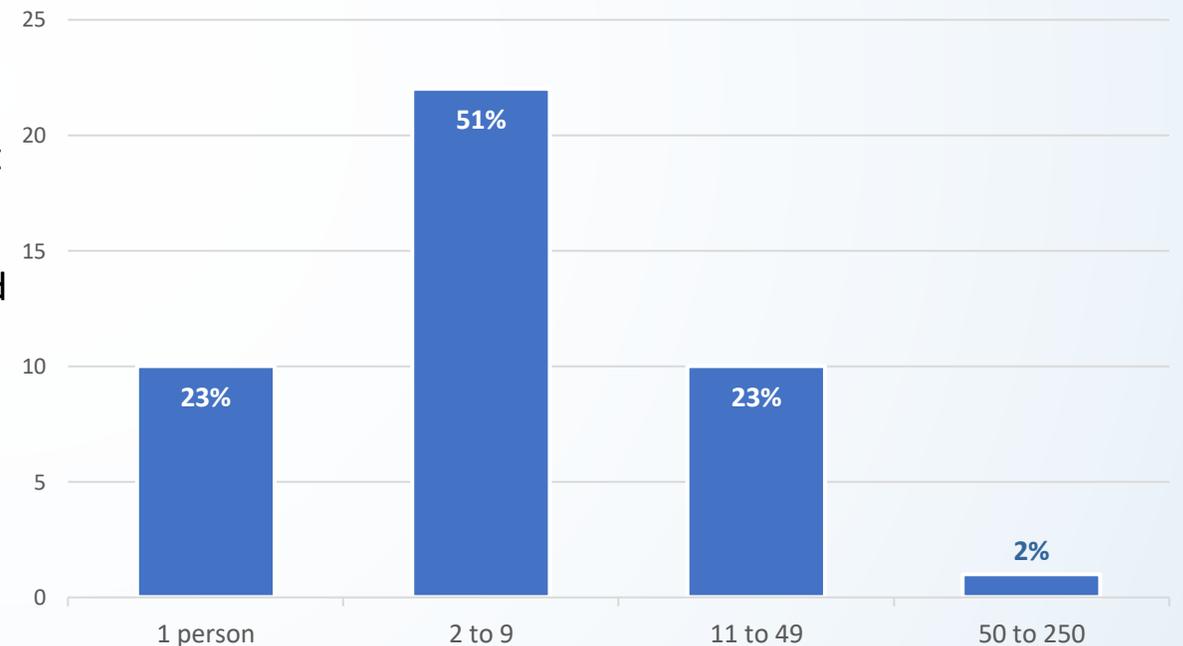
16

Countries



43

Start-ups



Note: 1 respondent indicated 0 employees, and has been counted as an OPC.

- **43 start-ups** (qualifying as such for the period of interest*) responded to the survey (4 replies were not counted as valid). This represents around 20% of the 226 start-ups in the EARSC Industry Survey 2021.
- The respondents are based in **16 different European countries** (inc. Liechtenstein, Norway, Switzerland and UK)
- The largest concentrations of respondents are located in **Germany** (18,6%), the **United Kingdom** (18,6%) and the **Czech Republic** (9,3%).
- Most of the respondents are **micro SMEs** (52%). Only one respondent represents a medium-sized enterprise.
- A considerably higher proportion of micro-companies are represented (+17%) than in the EARSC Industry Survey 2021, with less OPC (-6%), small (-9%) and medium (-1%).
- Innovation and Start-ups Survey 2019: **48 responses from start-ups** from **17 countries** were received, which is comparable to the present sample.

* 2015-2020. See Slide 5 for category definition.

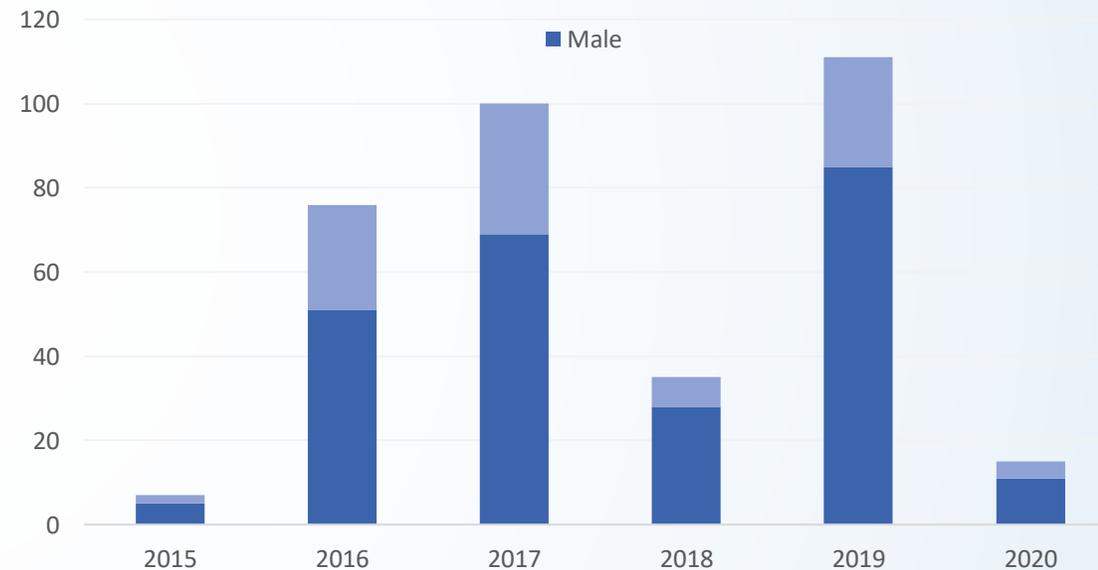
Start-up age and size

344

Total employees

- Most of the start-ups were formed in **2017** (30%), whilst only two (5%) have a founding year in 2015.
- **8 start-ups** were formed in 2019 and 2020, whilst **6** were formed in 2016 and 2018.
- The trend for employment by founding year shows increases between 2016, 2017 and 2019, and lower figures in 2018 and 2020.
- This compares strikingly with the EARSC Industry Survey 2021, which reports lower employment the younger the company. The average number of staff per company is **8**, compared to the EARSC Industry Survey 2021 average of **6.7**
- In 2019 and 2020, 8 new companies were formed each year, but employment in 2019 is almost a whole order of magnitude greater than in 2020. Similarly, the staff level of 6 companies formed in 2018 surpasses that of the 8 formed in 2020 by more than double.
- Overall, **27,6%** of the employed staff are female. Female to male ratios vary year to year, with 2018 being the least balanced (1:4) and 2016 representing the opposite case (almost 1:2).
- Innovation and Start-ups Survey 2019: There are some striking differences in the years 2015, 2018 and 2019 between the number of companies registered (see data below figure); this is assumed to be due to the different audiences targeted.

Total employees (in 2020) by founding year

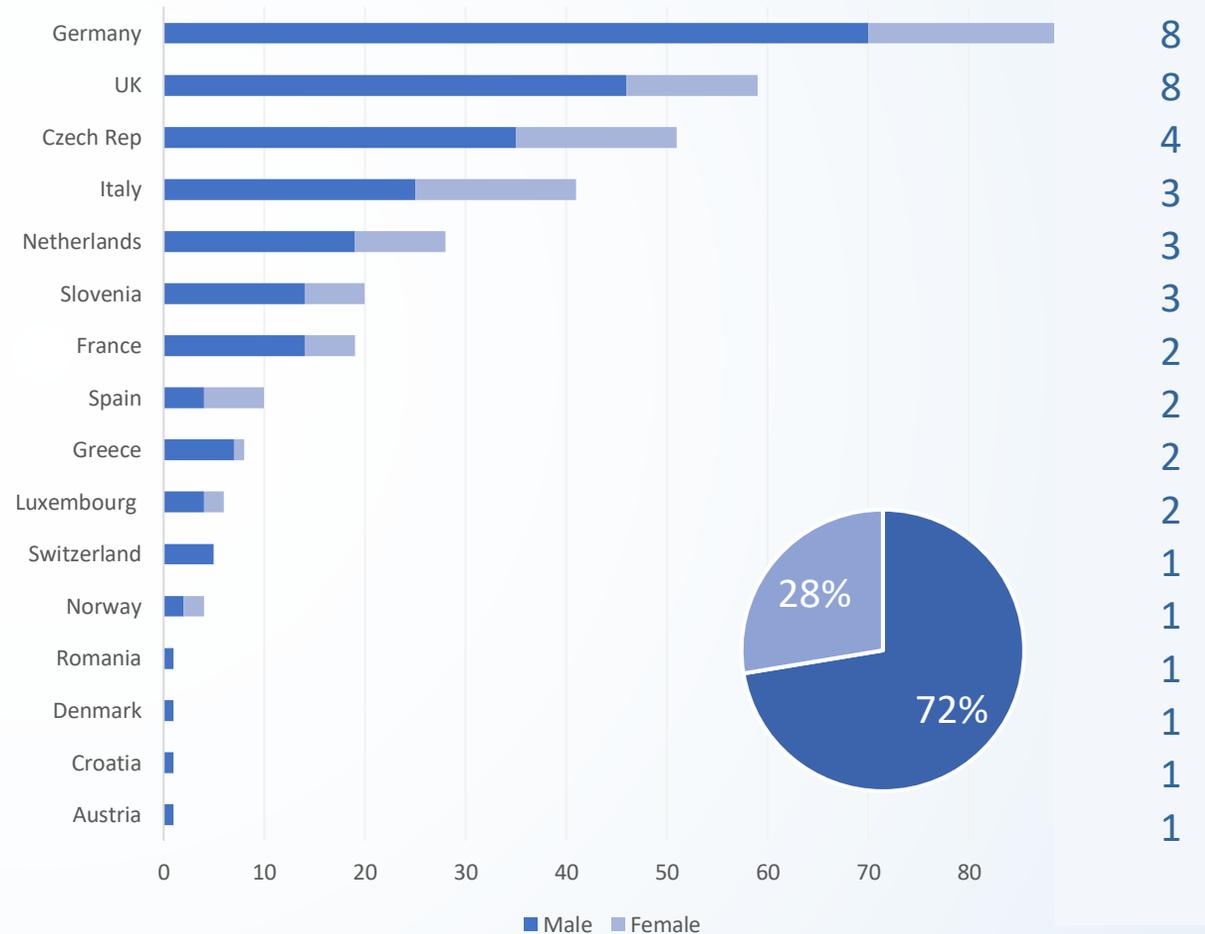


	2015	2016	2017	2018	2019	2020
# of Companies	2	6	13	6	8	8
2019 Survey	9	8	14	11	1	

Employment by country

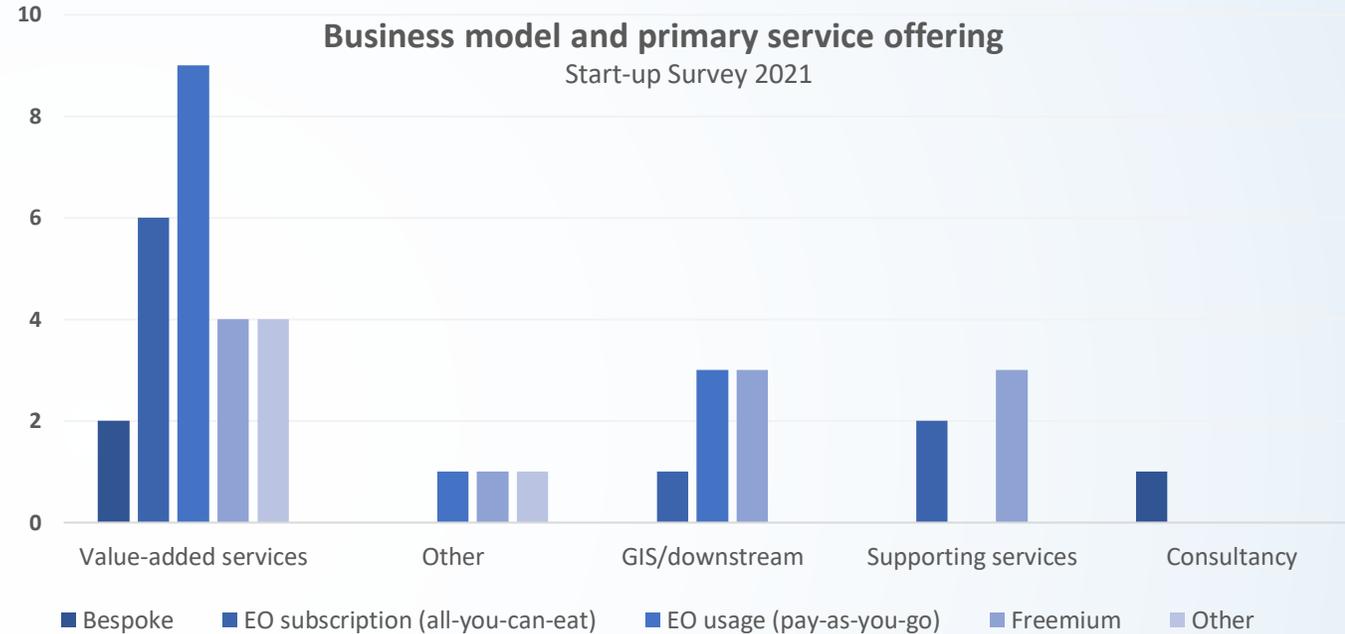
- **Germany** represents the country with the highest number of staff employed at EO start-ups in 2020. The **UK** and the **Czech Republic** follow. All other countries have less than 3 start-ups each, and less than 50 employed staff in total.
- This contrasts somewhat with the Innovation and Start-ups Survey 2019, in which Italy, France, the United Kingdom and the Netherlands elicited the most responses from start-ups.
- Whilst 8 start-ups each came from Germany and the UK, the latter's employment exceeds the former's by around a third.
- The gender balance **ranges from all-male to a slight female majority**. The former is the case for four OPCs and a 5-person company in Switzerland. The latter is the case in Spain, but spread over two companies. There is also gender parity in the response from Norway, with a 2:2 split.
- The three largest companies are Kleffmann Digital RS, **Germany** (50), CleverFarm, **Czech Republic** (35) and Sobolt BV, **Netherlands** (25).

Total employees (in 2020) by country

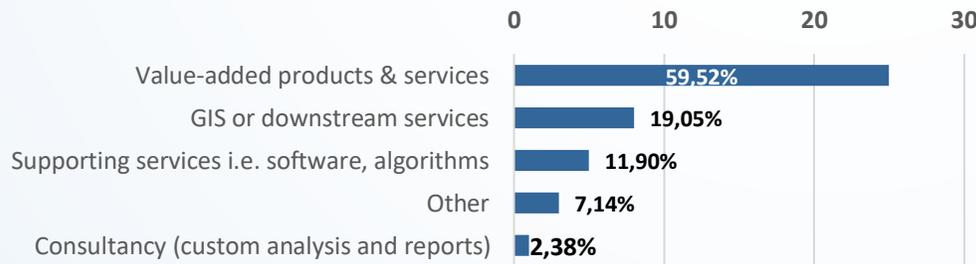


Business model and services (1)

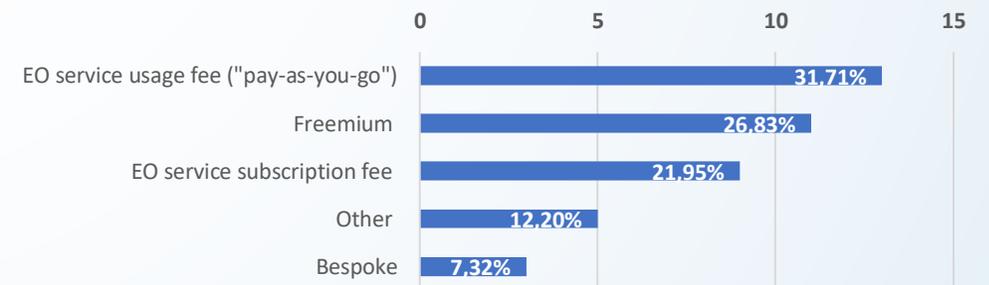
- **Value-added EO products and services is the most popular primary service offering** at ~60% of respondents. Within this, most companies offer services on a **per-use fee basis**, although there are companies working with subscription, freemium and bespoke business models*.
- **GIS or downstream services** make up **almost a fifth** of the sample's primary service, with per-use, subscription and freemium business models.
- **Supporting services comprise ~12%** of the sample, offering subscription and freemium models.
- **Consultancy and other services** make up ~10% of the offered services.



Primary Service Offered



Business Model*



* Multiple answers to this question were possible; therefore responses > respondents.

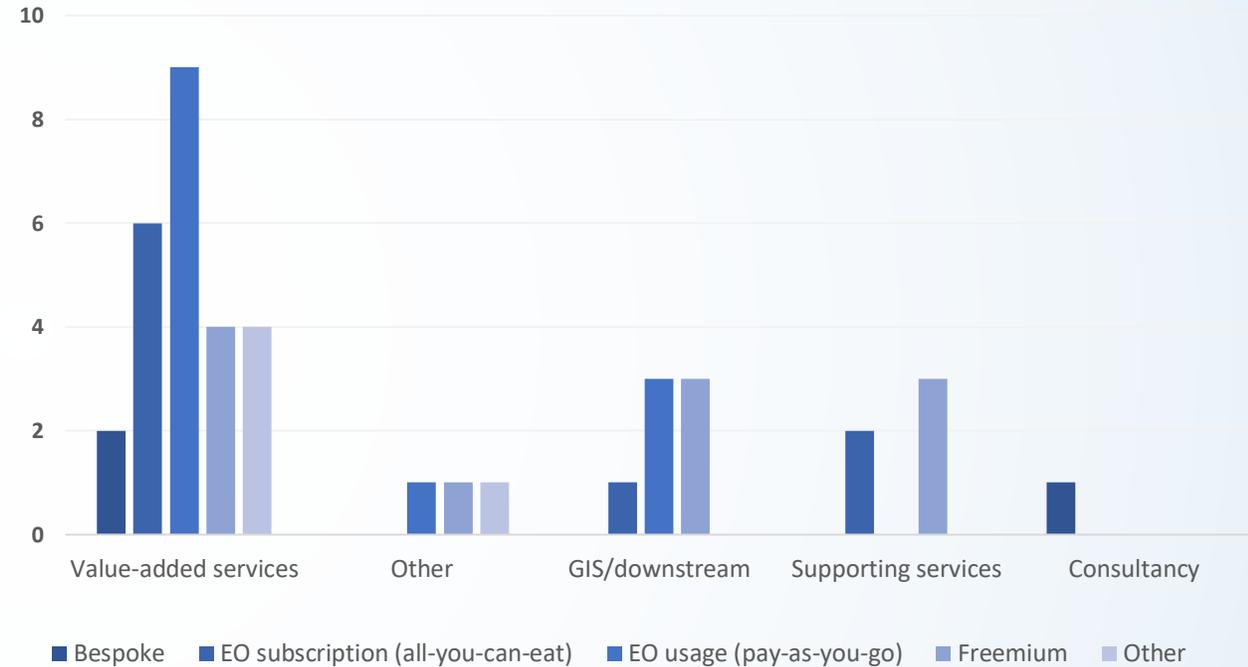
Business model and services (2)

Innovation and Start-ups Survey 2019*:

- Value-added products (geospatial) dominated at 51% of the 2019 sample, roughly comparable with the ~60% from the current survey.
- In the 2019 survey, the role of pure-play consultancy (8%) and data-as-a-service (7%) companies was much higher, compared to ~2,5% for consultancy and a combined 12% for supporting services (which include cloud, AI and other services).
- Dominant revenue models in the 2019 survey were subscription (53%) and usage (35%) fees, with numerous combinations also featuring the sale/rent of physical products (which are not examined in the current survey).
- It appears that the **usage (pay-as-you-go) revenue model is now more popular than subscription (all-you-can-eat).**

Business model and primary service offering

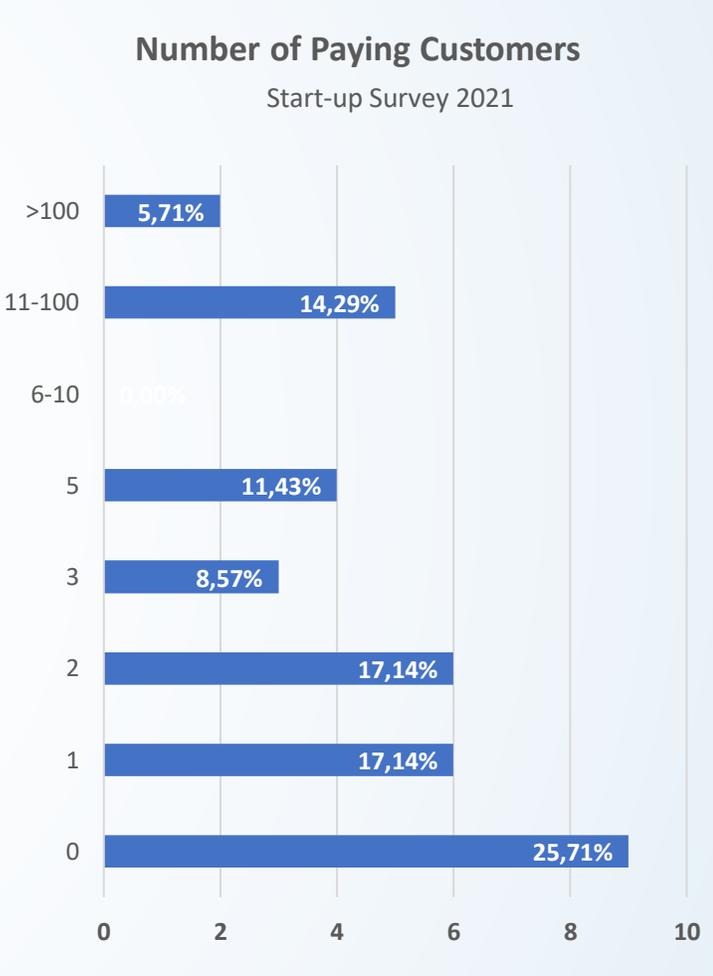
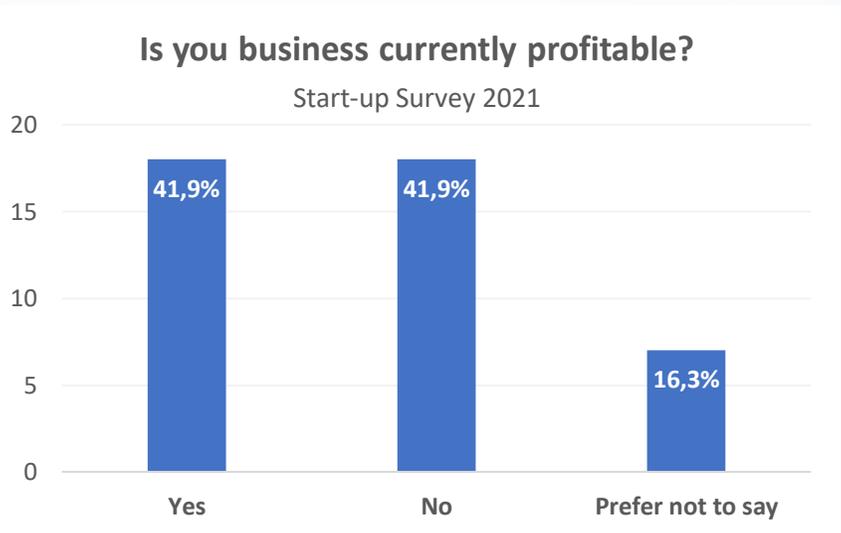
Innovation and Start-ups Survey 2019



**Note: The previous survey allowed for multiple responses, therefore it has not been possible to make a direct comparison across all categories.*

Profitability and revenue (1)

- The sample was **split equally on whether business was profitable** (around 42% each way), with ~16% preferring not to say.
- Almost **half the respondents** had revenues between zero and 50K in 2019*, whilst those of nearly 35% were reported between 101 and 1000K.
- One respondent's revenue in 2019 surpassed 1Mn Eur.
- In terms of paying customers:
 - Around a **quarter** of the sample do not have any
 - Almost 15% have between 11 and 100
 - 5.7% have more than 100



**39 of the 43 respondents provided valid answers concerning their total revenue (2019 or last full accounting year, 10% approximation)*

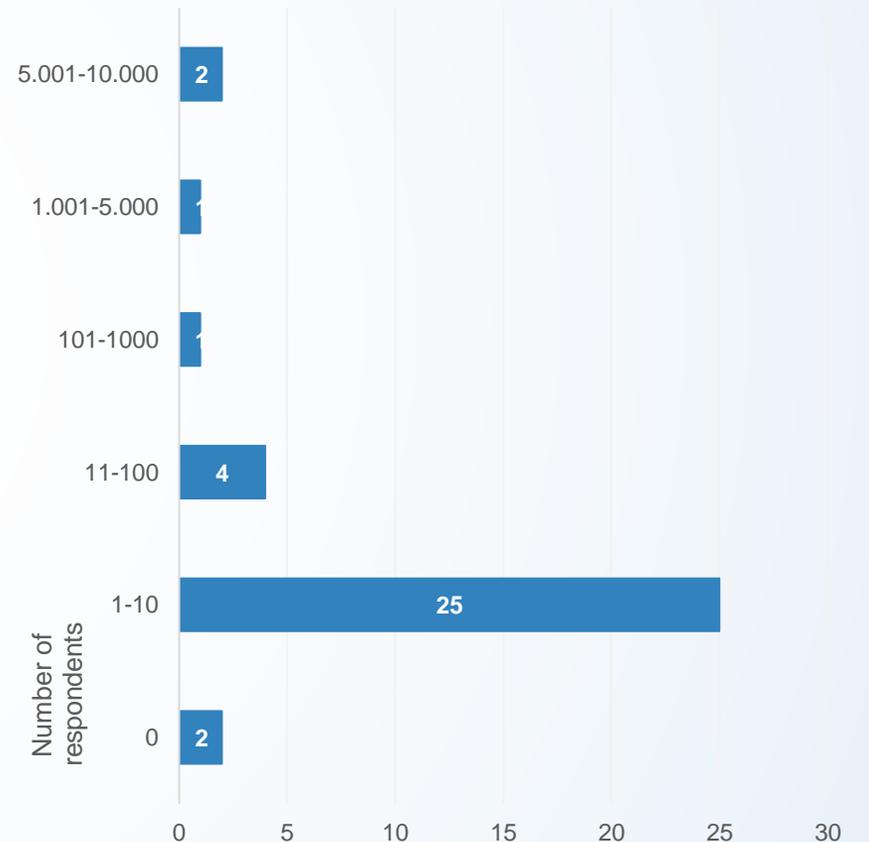
Profitability and revenue (2)

Innovation and Start-ups Survey 2019:

- Comparing the number of paying customers with those counted in the 2019 survey, the **proportional distribution is similar, with 1-10 being the dominant category** in both cases.
- Remarkably, **the number of respondents with no paying customers is nearly the same** (9 vs 10 in the 2019 survey)
- The 2021 survey registered around 42% less companies with paying customers between 1 and 10 (19 vs 33)
- 44% less companies had customers between 11 and 100 customers (5 vs 9)
- 66% less companies had customers above 100 customers (2 vs 6)
- In addition, the previous survey detailed two higher ranges, 1.001-5.000 and 5.001-10.000, each with two entries.

Number of paying customers*

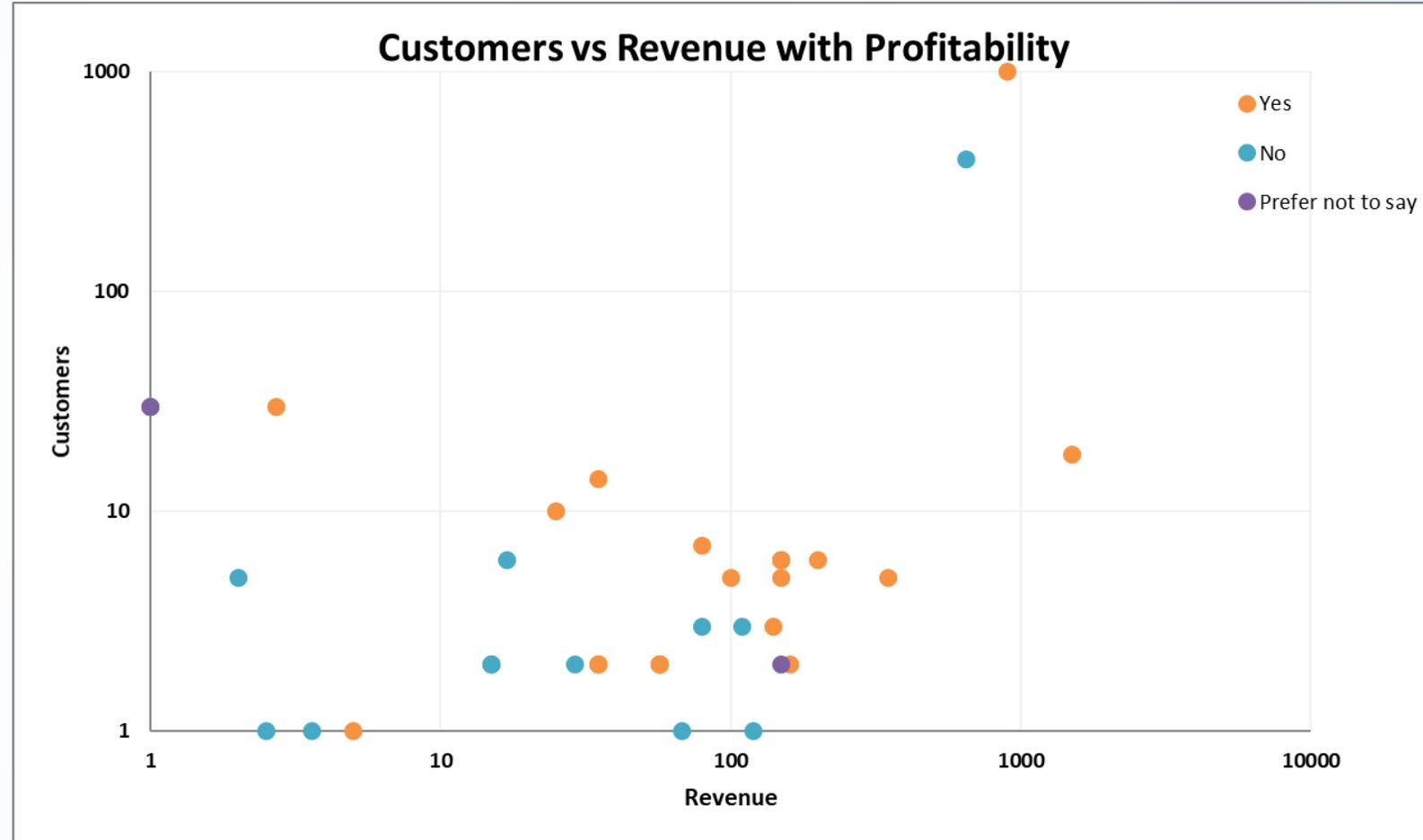
Innovation and Start-ups Survey 2019



58 valid responses shown, out of 97 in total

Profitability and revenue (3)

- The graph to the right maps the responses on **revenue** and **customers**, also showing the profitability of the respondents.
- Two outliers outpace all the others at the top-right, with very high customer and revenue numbers. Interestingly, they gave opposing answers to the profitability question.
- The majority of the responses are clustered around the lower central part of the diagram.
- Amongst those with more than 120K revenue, only the aforementioned outlier reported not being profitable yet.
- Almost all profitable companies have less than 20 customers.

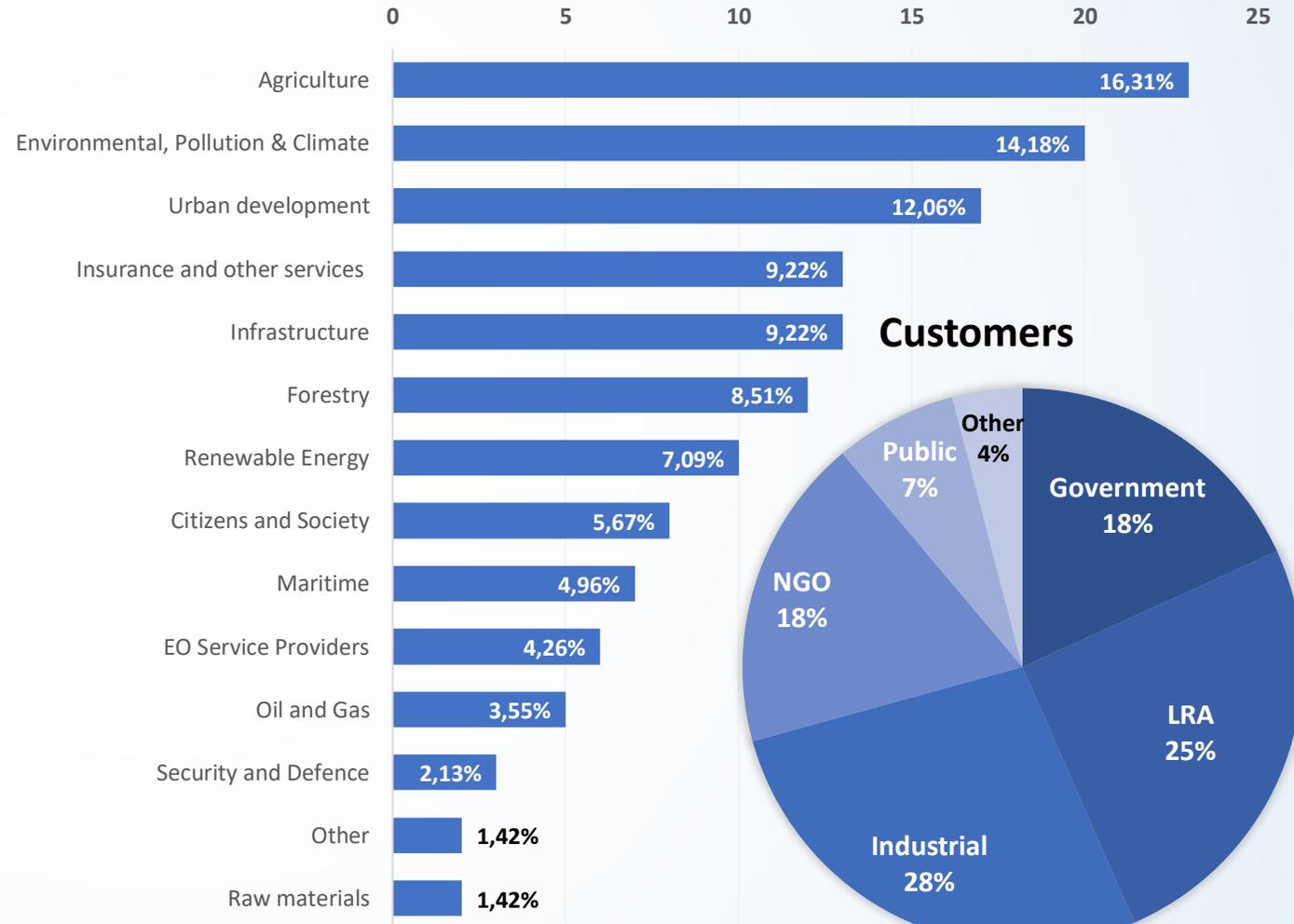


30 data points shown; respondents with 0 revenue are not shown. Note that both axes are on a logarithmic scale, chosen so that full dataset is visible on one graph.

Markets and customers

- **Agriculture, Environment** and **Urban** are the top market segments. Together, they make up 42% of responses*.
- Within Agriculture, customer types mentioned include the agricultural service sector (finance, machinery, chemicals) and farmers consultants and associations.
- The **Industrial** and **LRA** customer segments make up half the sample. **Government** (including EU), and **NGO** comprise 18% each. The remaining 11% for customers is spread across the general public and the Other category.
- Innovation and Start-ups Survey 2019: In contrast to the above, the customer profile amongst respondents was overwhelmingly Business (B2B) or Government (B2G), with only a fifth of respondents targeting the consumer market.

Market segments



* Multiple answers to both these questions were possible; therefore responses > respondents.

Level of Technology

- The Technology Readiness Level as reported by companies shows that **around 45% are ready for the market (almost 30% at TRL 9) and 15% at TRL 8** (system complete and qualified). TRL5-7 make up another 30% of the sample.
- The graph correlates TRL with founding year; it is of interest that even rather young start-ups (e.g. from 2019) have rather advanced products.
- Conversely, a couple of start-ups from 2016 have products at TRL 2 and 4 (although there may be other explanations for this). All the start-ups from 2020 have TLR less than 5.
- Innovation and Start-ups Survey 2019: A very different profile was presented, with a fairly even distribution across TRL levels of 15-18% each: (i) TRL 2 and 3 (ii)TRL 6 and 7, and (iii) TRL 9. The apparent conclusion is that **start-ups are much closer to technological maturity**, but this would require verification, taking into account the differences in the samples.

TRL vs Founding Year*



*41 data points; only who responded to both questions are shown.

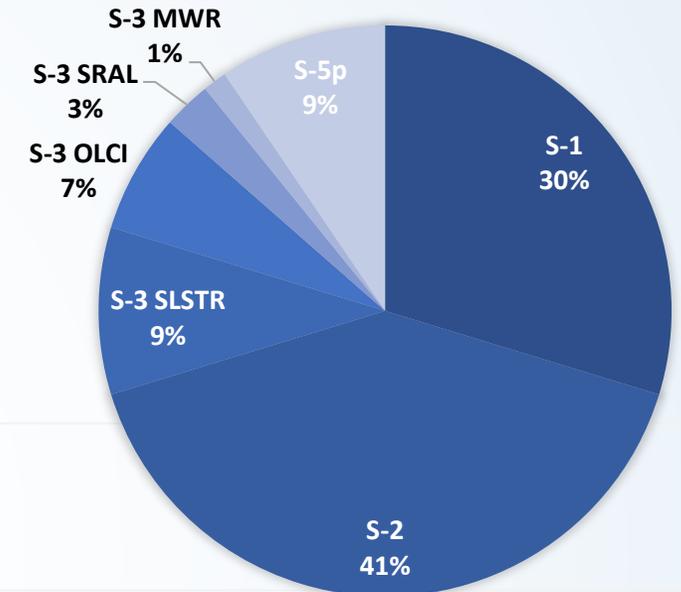
Use of Sentinel data

- The **majority (~73%)** of respondents use Sentinel data a lot to power their businesses. Only 5% do not use any EO data.
- The **majority of the data consumed comes from Sentinel-2 (41%)**, with Sentinel-1 following at 30%.
- Sentinel 5p and S-3 SLSTR users are at around 10%
- This pattern reflects the maturity of the missions (i.e. years since launch) as well as the size of the application areas.
- Of interest in follow-up work would be to see how and to which extent plans to introduce data have been realised.
- Innovation and Start-ups Survey 2019: Sentinel-2 was also dominant across the sample (72%), with Sentinel-1 following (60%), but the proportions were larger, which suggests that **the other Sentinels are gaining traction**. Sentinel-3 was split between the optical (40%) and topographic (22%) packages. 13% of the sample surveyed used Sentinel 5-p.

Are you using data from Copernicus Sentinel satellites?



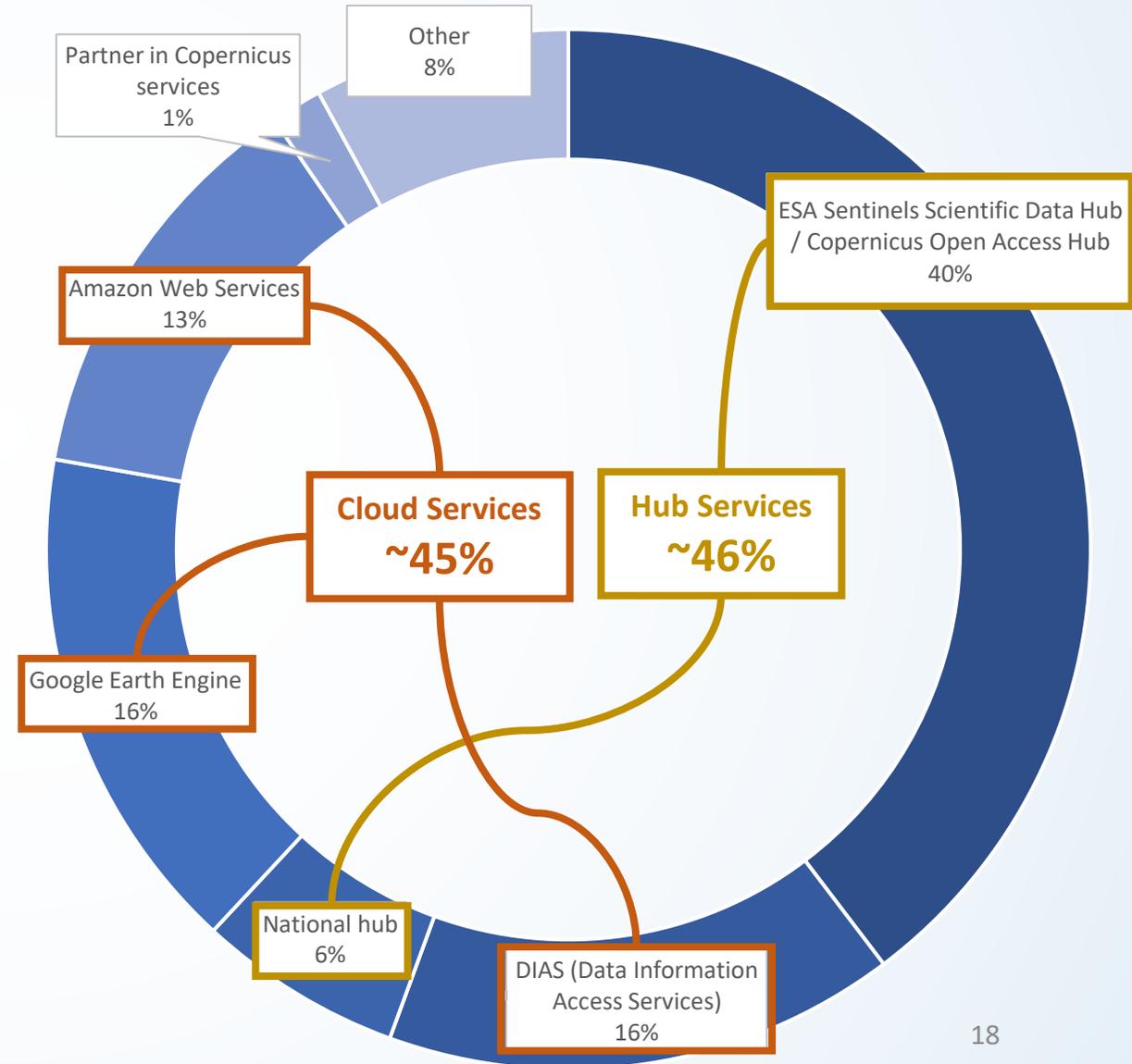
Which Sentinel*?



Access to Sentinel Data

How are you accessing data from Copernicus Sentinel satellites*?

- Most respondents use the ESA **Sentinels Scientific Data Hub / Copernicus Open Access Hub** to access data (39% combined). This is somewhat surprising as the Hub is not designed for operational, commercial users.
- If we include national services, **the use of such hub services totals ~46%**.
- In contrast, we find the use of cloud services, with **DIAS and Google Earth Engine both in use by 16%**, and Amazon Web Services by 13%. Taken together, **cloud services make up ~45%**.
- This might parallel the split between those companies still developing and validating products and those ready for the market (see slide "[Level of Technology](#)").

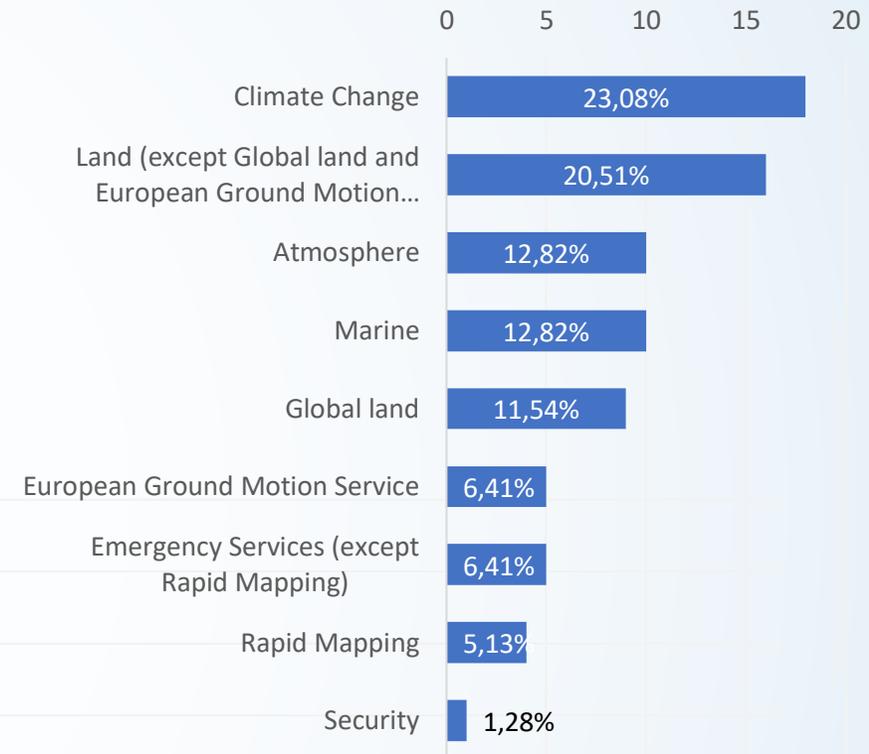


* Multiple answers to this question were possible; therefore responses > respondents.

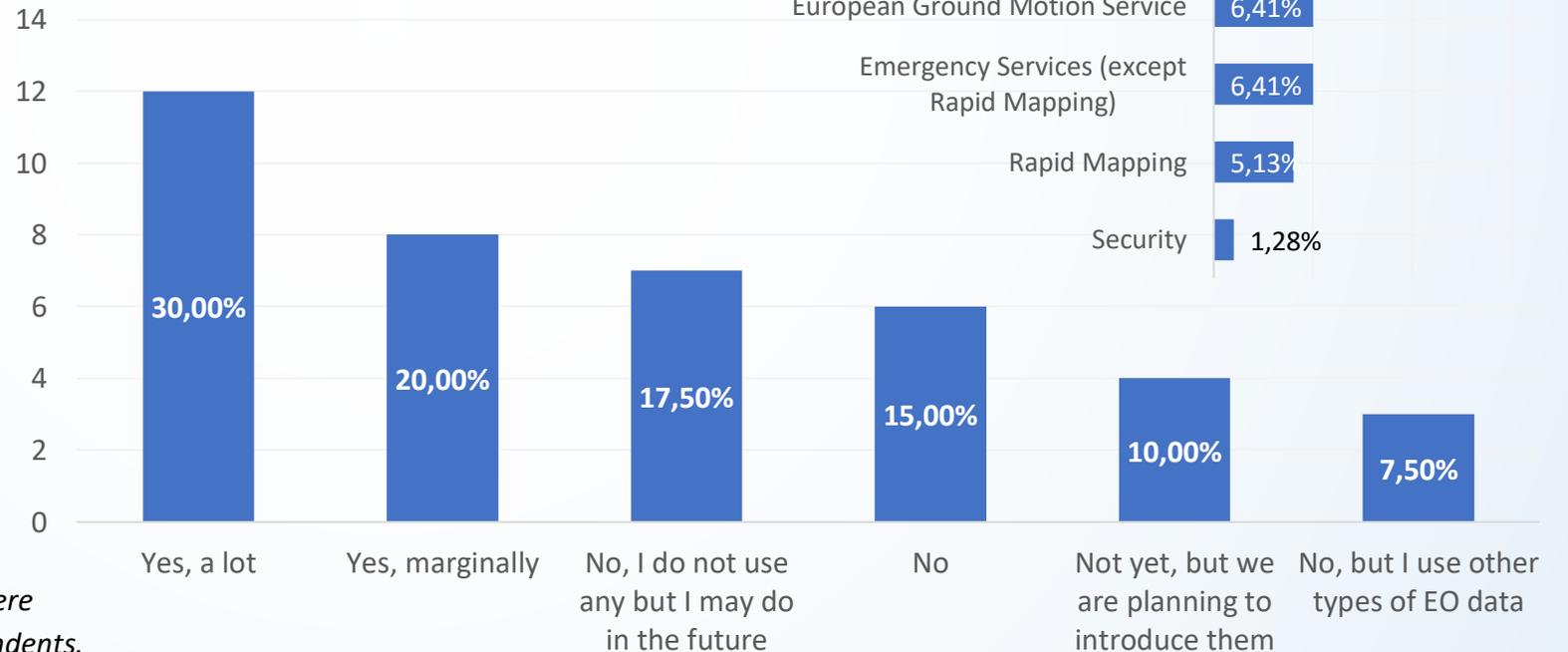
Use of Copernicus services

- Around **half the respondents also use the Copernicus Services** in their products.
- **Around 28% do not currently use the services, but plan to** or may do in the future.
- The services with the most interest are **Climate (~23%)** and **Land (except Global/EGMS), ~20%**.
- **Atmosphere, Marine** and **Global Land** are each of interest to 11-12% of the sample.
- The EMS (excl. Rapid Mapping) and the EGMS each show interest to 6,4% of the sample.

Which services interest you most (now or in future)*?



Are you using data from Copernicus services?

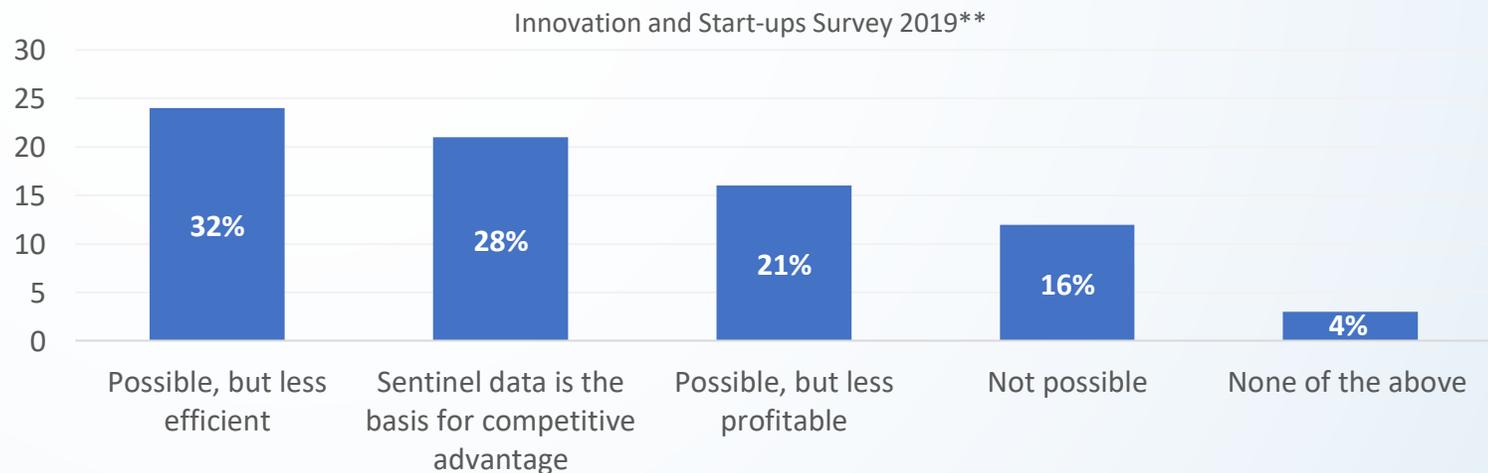
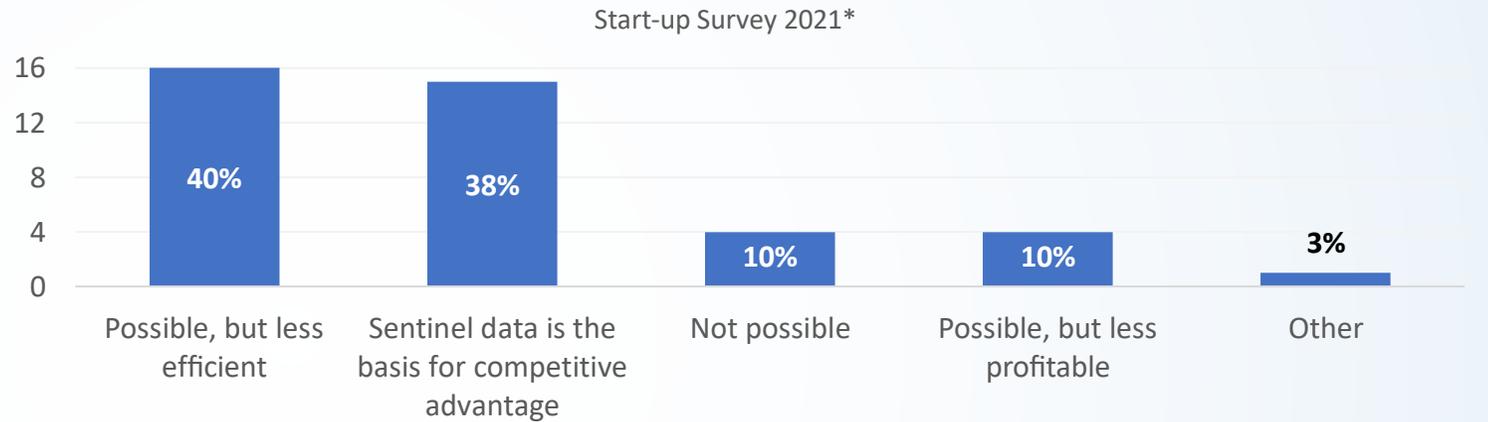


* Multiple answers to this question were possible; therefore responses > respondents.

Importance of Sentinel Data (1)

- 38% indicated that **Sentinel data is the basis for their competitive advantage**, and an additional **10% could not run their business without it**.
- **Most participants (40%) could operate without Sentinel data**, but less efficiently.
- 10% could operate, but less profitably.
- Innovation and Start-ups Survey 2019: The top two responses are the same across surveys: “possible, but less efficient” and “basis for competitive advantage”. In 2019, the “possible but less profitable” responses ranked somewhat higher than “not possible”, whereas in 2021 the categories scored the same.

Impact of FODP: Would your business model be possible without Copernicus?



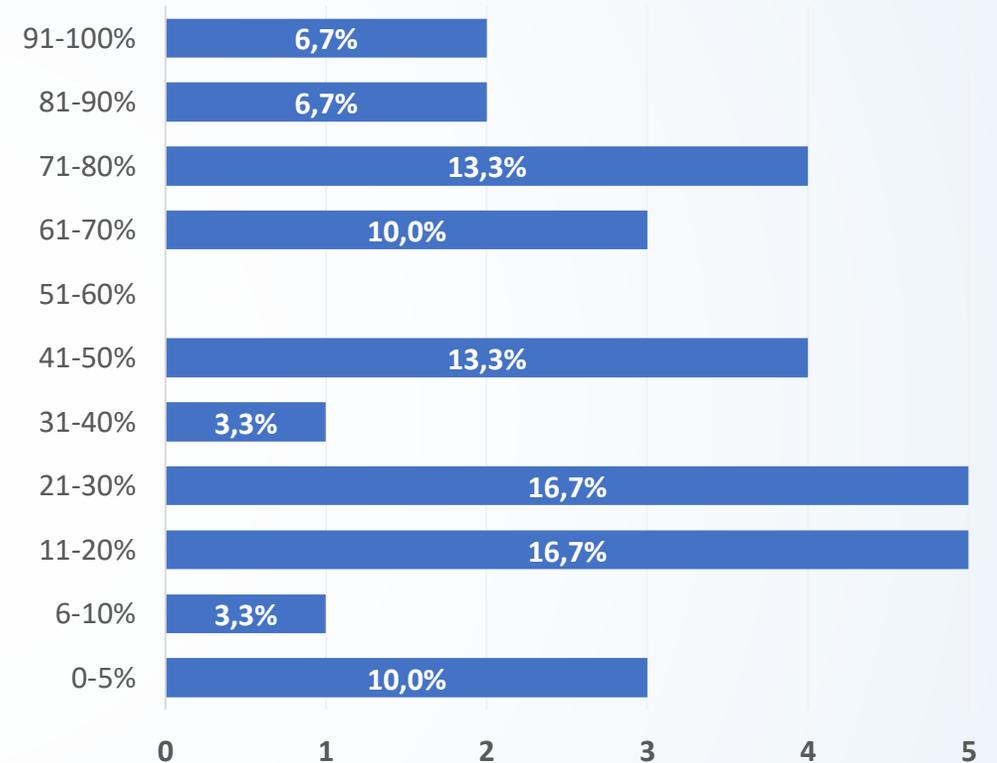
* Responses from 40 participants.

** 76 responses. Multiple answers to this question were possible; therefore responses > respondents.

Importance of Sentinel Data (2)

- **37% of respondents indicated that 50% or more of their revenue depends on Copernicus data or services**
- Within this group, 3 participants (10%) indicated 90%, 95% and 100%.
- 33% have a dependency between 11 and 30%.
- **The estimated total revenue dependent on Copernicus is EUR 1,1 M.**

Total revenue based on Copernicus
~1,1M



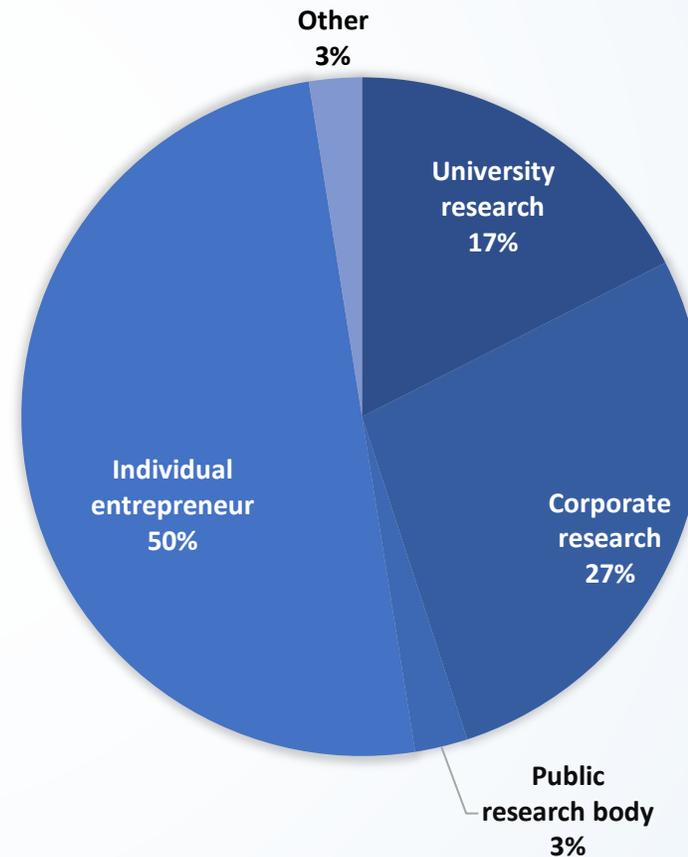
What proportion of revenue depends on Copernicus data or services*?

** Responses from 30 participants.*

Origins of the business idea

- **Half the sample** reported that the business idea came from the entrepreneurs themselves
- 27% came from a private company (corporate research)
- 17% originated within a university or academic institute
- A very small number (3%) reported that a public research body was the source of the business idea, and the same proportion noted “other”.

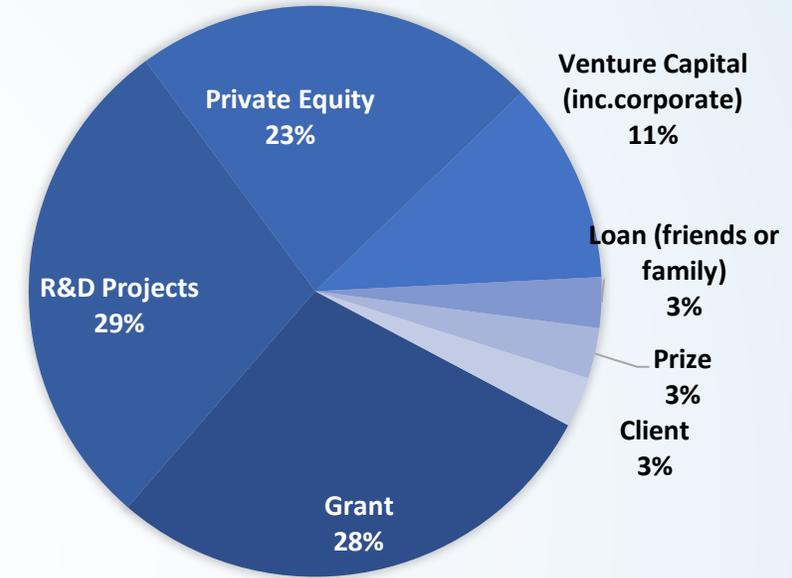
Origins of the business idea



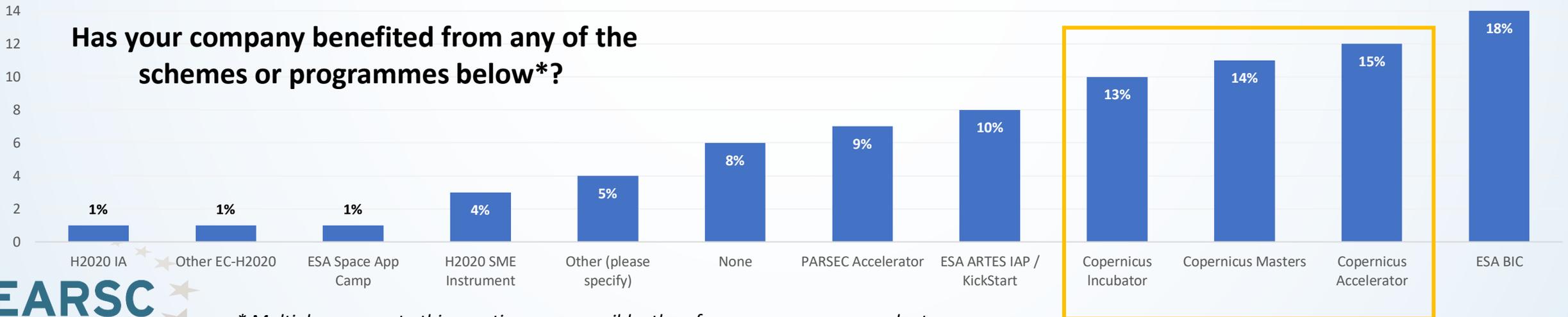
Finance (1)

- All but 6 respondents had benefitted from one of the schemes mentioned. **Most (60%) had been in an ESA BIC or participated in the Copernicus Start-up Programme.**
- Almost **60% were initially funded by R&D projects or grants.**
- Private equity makes up 23% of the sample's initial finance source.
- **Much less (11%) sought venture capital**, and only 3% each relied on informal loans, prizes or clients.
- These results emphasise the **potential for VC capital to be better exploited within EO**, and the heavy reliance on the EO start-up ecosystem on public funding sources.

Source of initial finance (beyond personal investment)



Has your company benefited from any of the schemes or programmes below*?



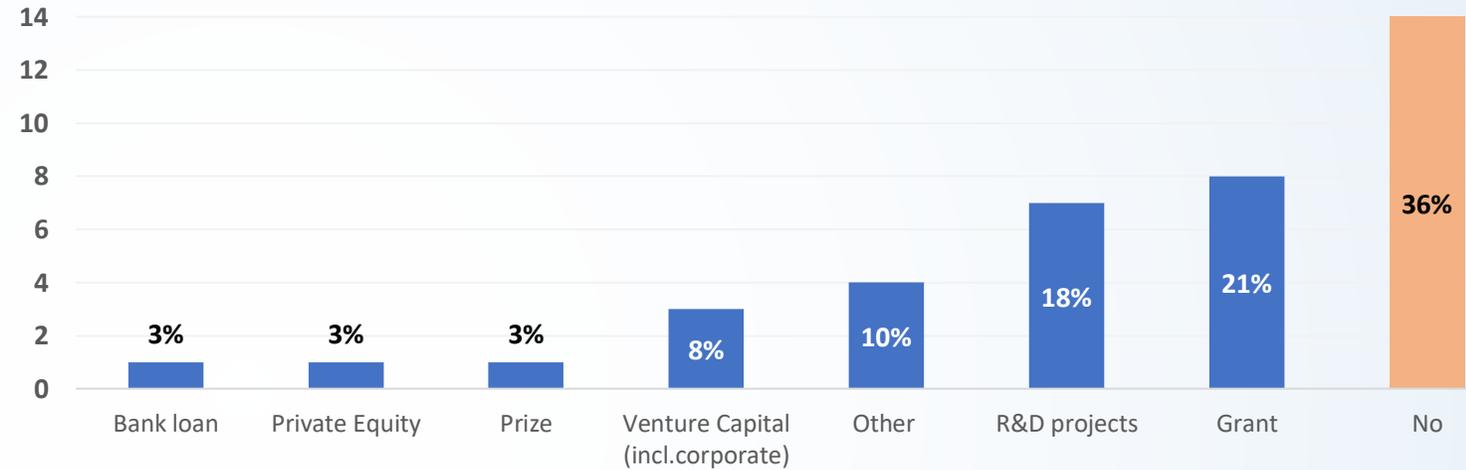
* Multiple answers to this question were possible; therefore responses > respondents.

Copernicus Start-up Programme

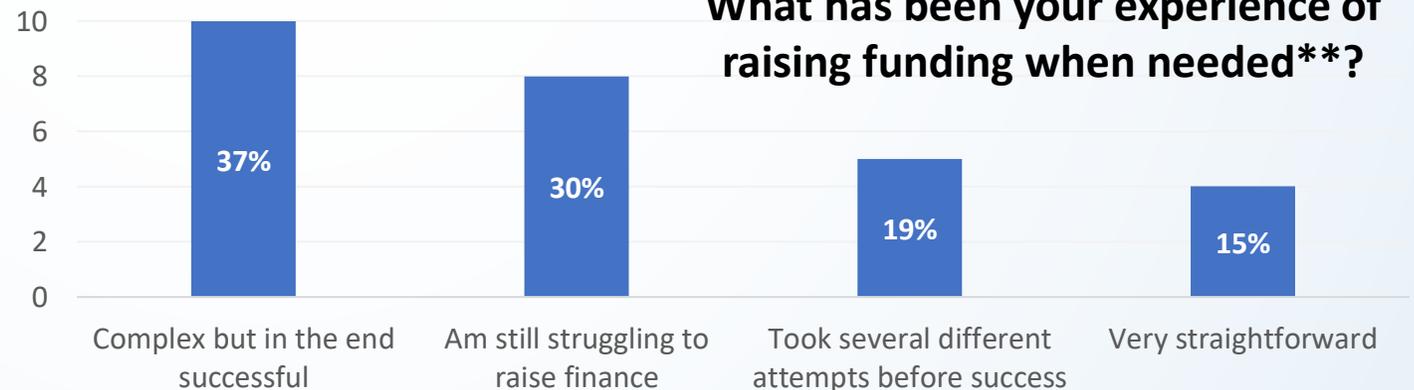
Finance (2)

- **Over a third of participants (36%) had not raised additional funds** at the time of the survey.
- **Almost 30% had raised money** in the form of either a grant (21%) or a research project (18%)
- 10% raised money in other ways, which included combinations of grants and private equity, as well as client funding.
- **Close to two-fifths (37%) reported that although complex, raising finance was successful in the end.**
- **30% declared that they are struggling to raise finance.** The remaining 34% found either no major problems (15%) or eventual success with repeat attempts (19%).

Have you raised additional funding and if so how*?



What has been your experience of raising funding when needed**?



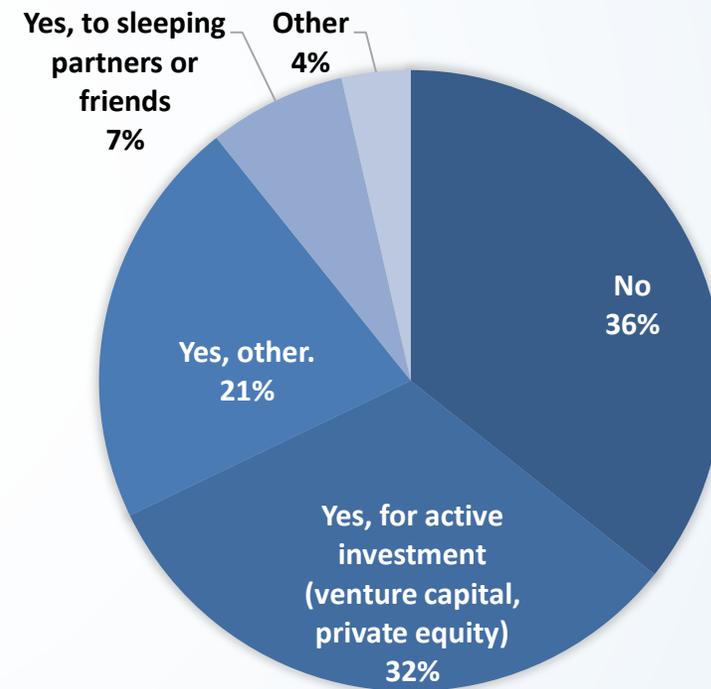
*39 data points. Multiple answers to this question were possible; therefore responses > respondents.

**27 data points.

Finance (3)

- **Just over 60% of respondents have ceded equity in their business:**
 - Most of these (32%) did so in exchange for active investment, such as venture capital and private equity.
 - 21% did so in other contexts, such as to a new business partner.
 - A small proportion (7%) transferred equity to “sleeping” partners or to friends/family.
- **36% of respondents have not ceded any of their equity**
- 4% did not specify whether they ceded equity or not, nor under which circumstances.

Have you ceded equity in your business*?



Operational Barriers

- The most significant operational barriers reported by start-ups are **market and user acceptance (20%)**, **finding new customers (17%)** and **lack of funding for development (15%)**.
- Less impactful factors include lack of staff (9%), competition from public organisations (7%), non-EO sources (3%) or other EO suppliers (2%) and administrative burdens (6%).
- Perhaps most interesting is that the **lack of development or VC funding does not appear to constitute a major barrier** to growth in the eyes of the start-ups.
- There is also **no major issue around operational data supply**, although a few companies cite the cost of EO data as a barrier – but this depends very much on their specific use cases

What are the most significant barriers to growth that your company faces*?

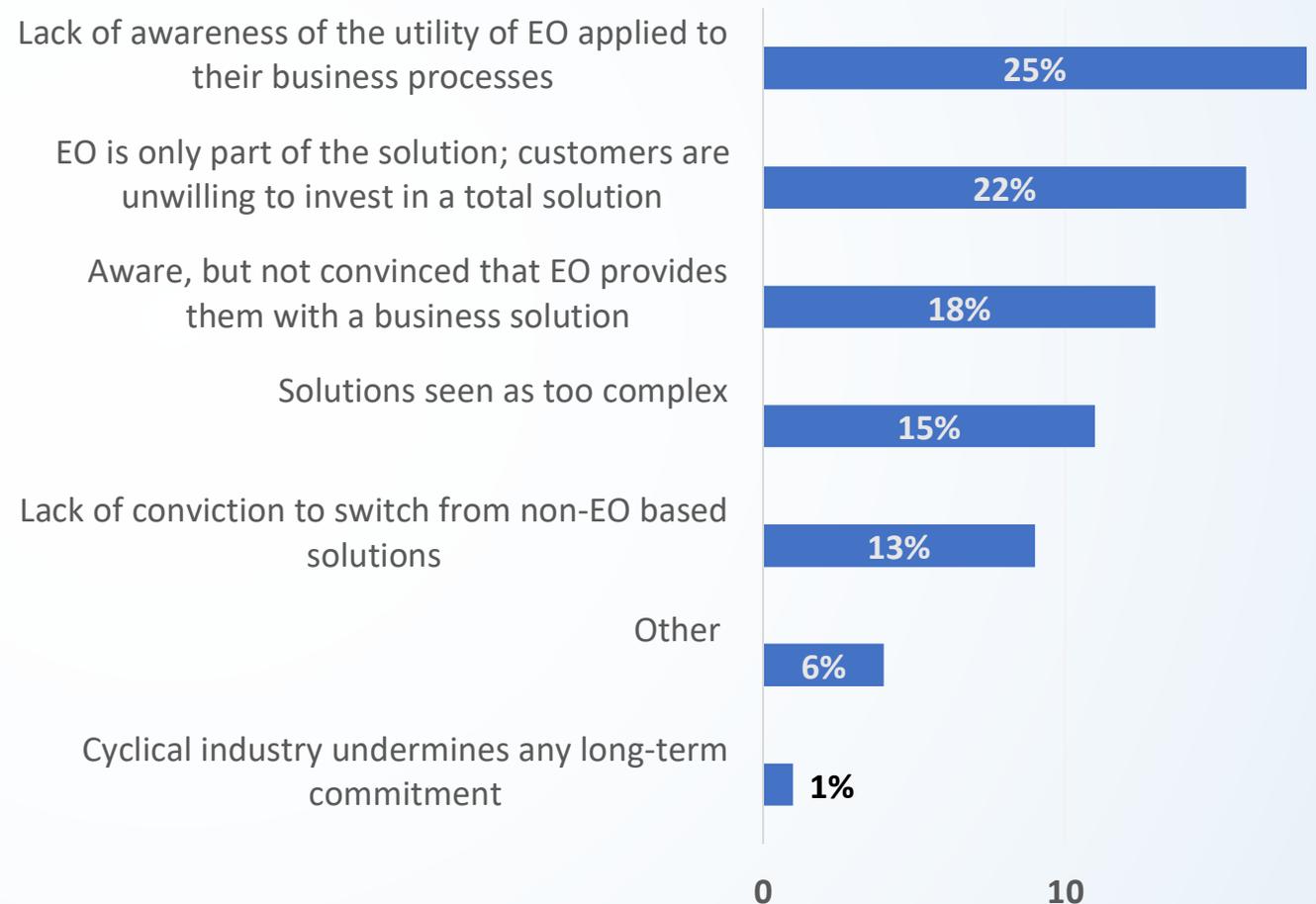


Market Barriers (1)

- **The most significant barrier to customer uptake, making up 25% of responses, is lack of awareness of the value or utility of EO.**
- Closely following (22%) is the **lack of will to invest in a full solution**, of which EO is only a contributing part.
- A **failure to convince customers** made up 18% of responses. Taken together with **lack of conviction to switch from non-EO solutions** (13%), we can conclude that some 32% of responses share a root cause in **unconvincing or ineffective sales tactics**.
- 15% of responses indicate that customers see the EO solution as too complex, which could be linked to the above point in some cases, and may indicate a lack of market maturity overall.

What are the most significant barriers related to customer uptake*?

Start-up Survey 2021



* Multiple answers to this question were possible; therefore responses > respondents.

Market Barriers (2)

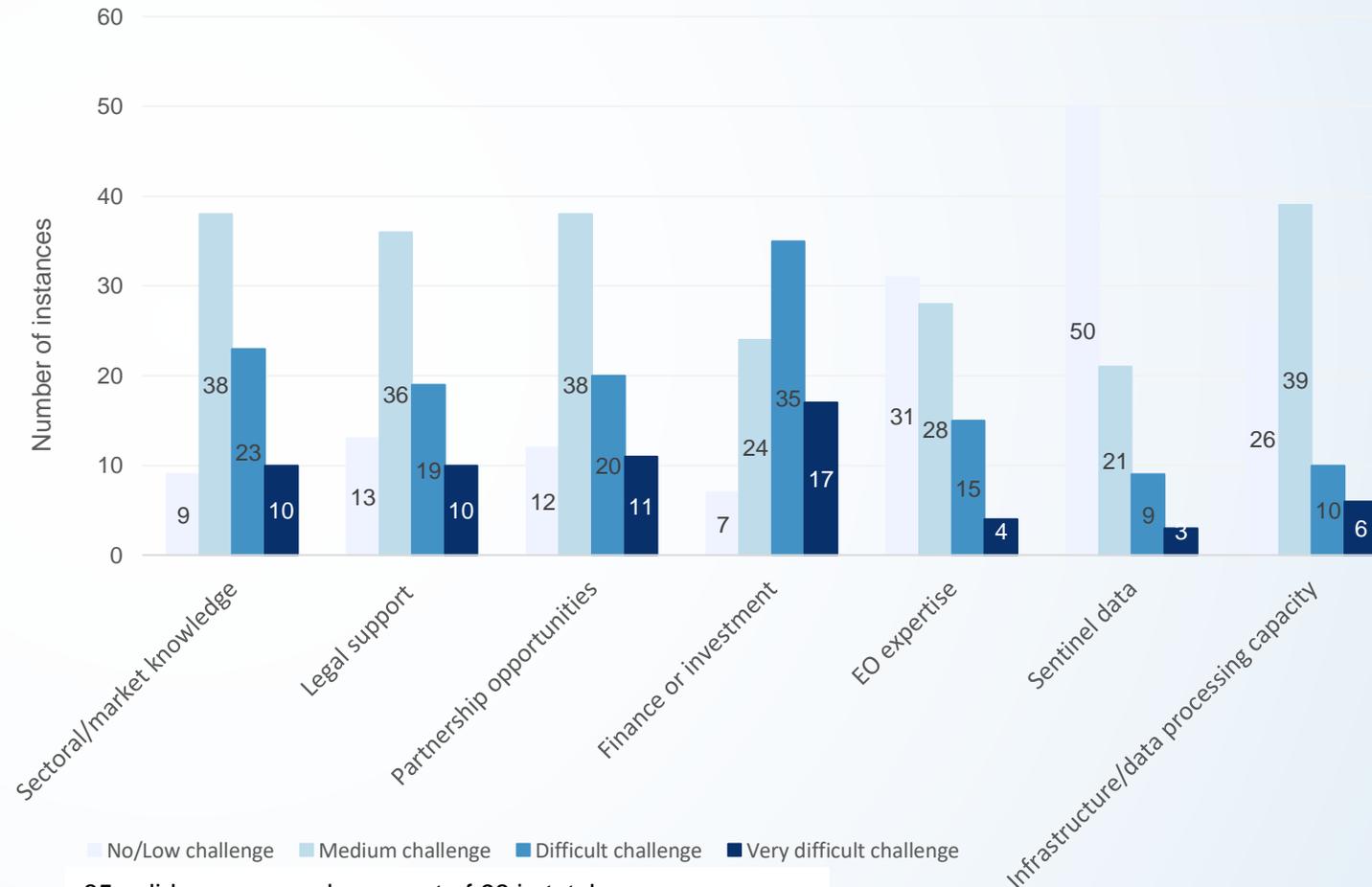
Innovation and Start-ups Survey 2019*:

- In the 2019 survey, approximately equal numbers of participants indicated **sectoral/market knowledge, legal support, partnership opportunities** and **infrastructure/data processing capacity** as medium challenges.
- The most-cited difficult or very difficult challenge was **finance or investment**, followed by **partnership opportunities, sectoral/market knowledge** and **legal support**.
- Access to Sentinel data was considered no/a low challenge by 50 respondents.

* Multiple answers to this question were possible; therefore responses > respondents.

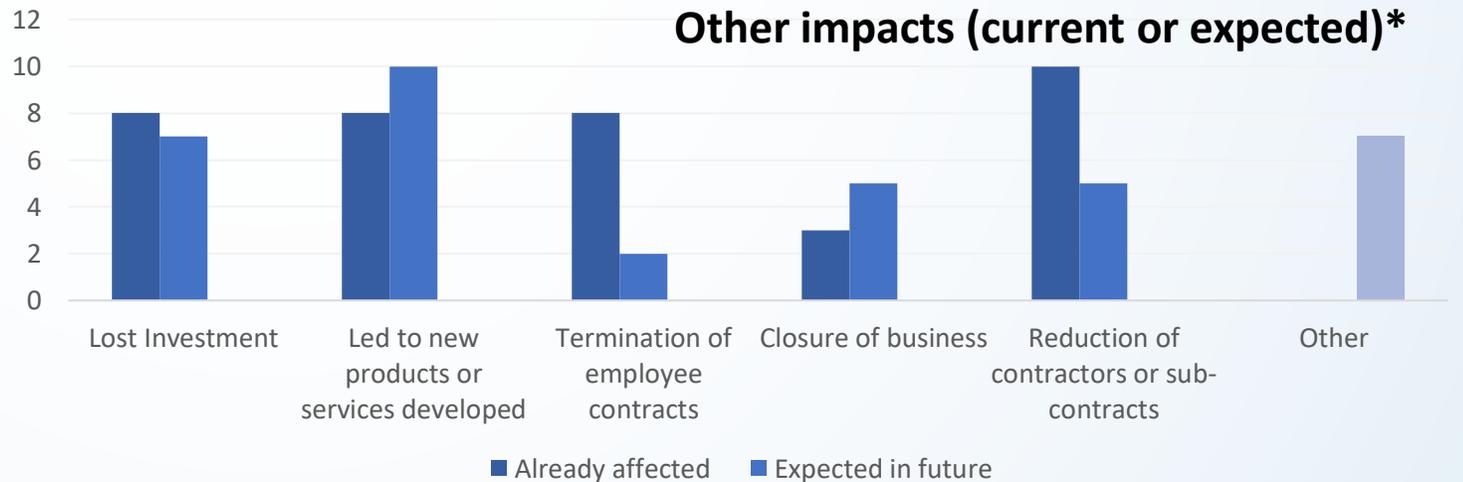
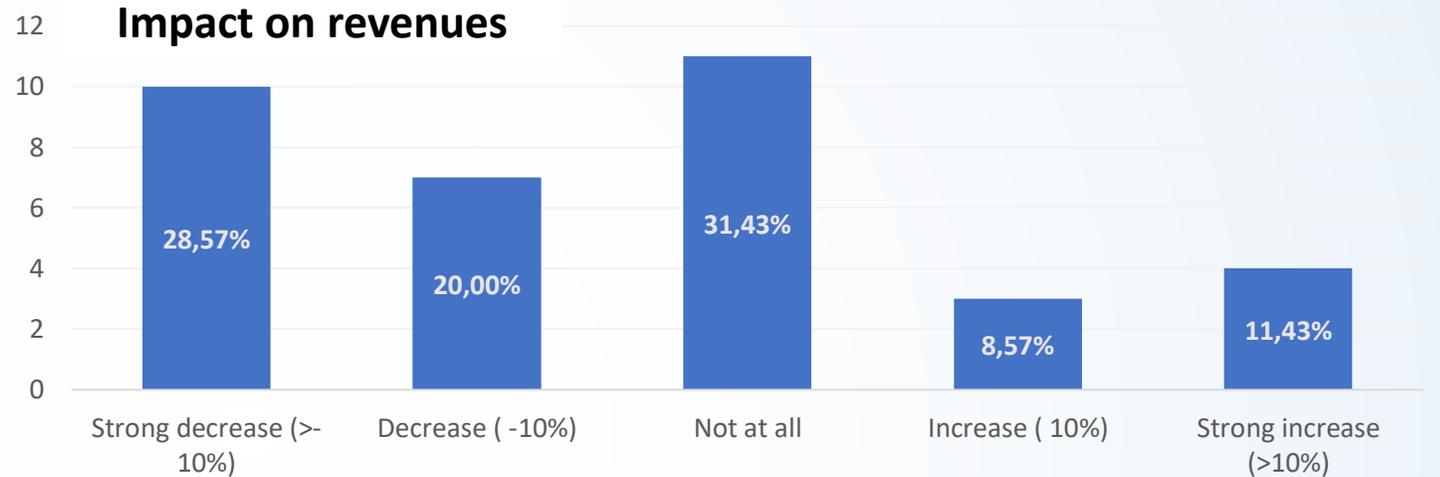
Challenges faced by Sentinel-powered innovators

Innovation and Start-ups Survey 2019



Impact of COVID-19

- **The COVID-19 pandemic affected revenues of almost half the respondents.** ~29% indicated a decrease of more than 10%, with 20% indicating around 10% losses.
 - Just under a third (31,4%) were not impacted revenue-wise.
 - 20% benefitted by an increase in revenues of 10% (8,5%) or more (11,4%).
- Aside from revenue, the **reduction of contractors** has already impacted 10 companies with 8 also noting losses of **investment** and **employees**.
- **Lost investment is expected to continue, but less companies expect to lose more staff**
- **5 business expect business closure in future as a result of the pandemic, and 3 have already experienced this.**
- **On the other hand, 8 companies have already developed new products/services, and 10 expect to do so in future.**

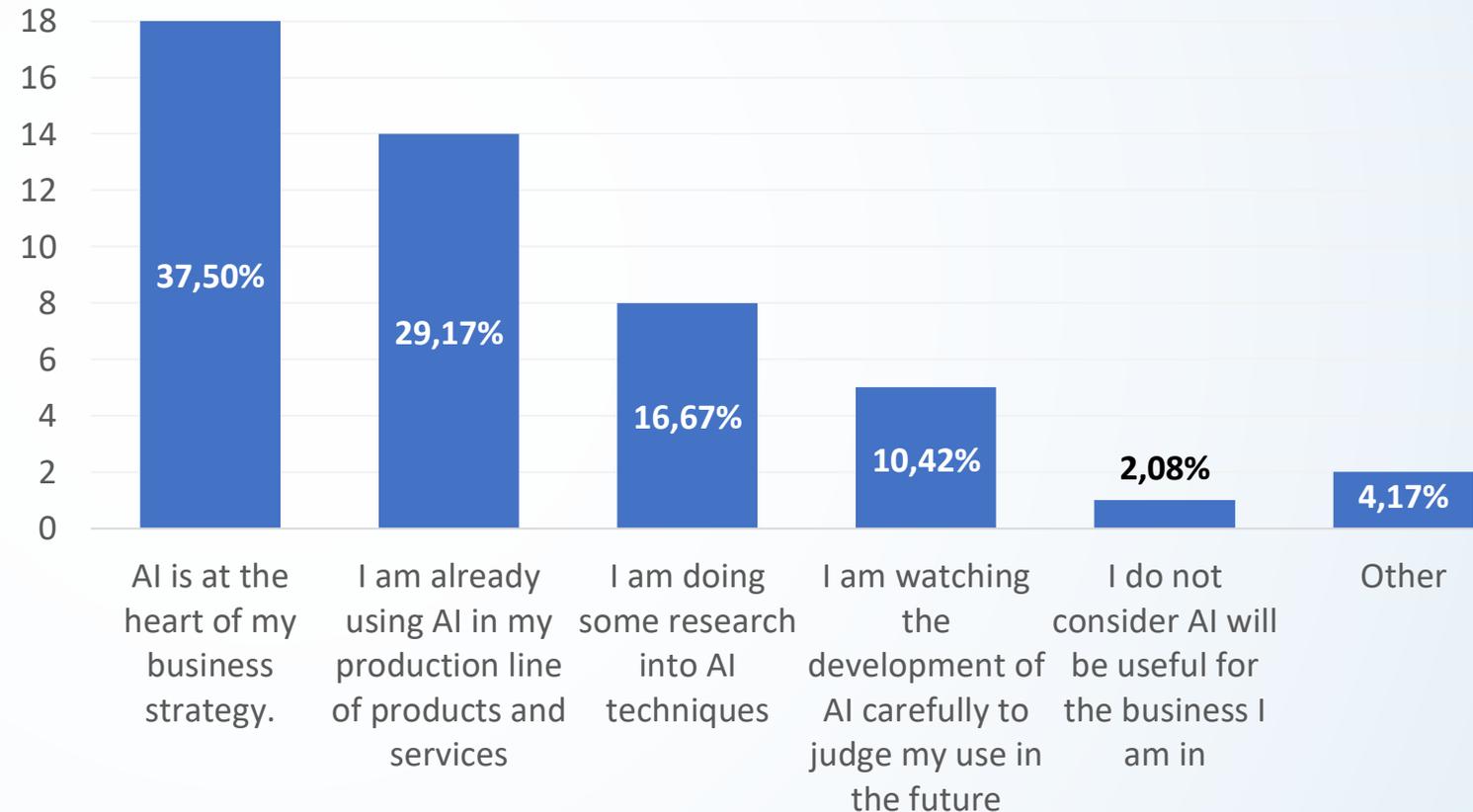


* Multiple answers to this question were possible; therefore responses > respondents.

AI Technology Uptake

- A significant proportion (~38%) of companies place AI at the centre of their strategies, whilst a further ~30% are using AI in their services.
- This allows us to state that AI contributes significantly to 67% of the start-ups who responded.
- 27% are tentative on adoption, either performing research (17%) or just observing developments (~10%)
- A very small proportion (2%) declared that AI would not be useful for them.

Do you have plans to work with Artificial Intelligence (AI)?



** Multiple answers to this question were possible; therefore responses > respondents.*

Postscript

This report on EO start-ups in 2021 contributes to the **EARSC Industry Survey 2021**, which as of 2019 is carried out annually, but with a different methodology every second year.

The more direct method has shown its value and we are able to develop a better understanding of some of the dynamics of the sector – especially linked to start-ups.

This report constitutes a deliverable of the [SEBS \(Sentinel Benefits Assessment\) study](#) for the European Space Agency. More information on the background and context of the study is found on the [dedicated website](#), and on the [EARSC website](#).

The next survey will take place at the end of 2021 and be published in Summer 2022.



Any comments or questions relating to this survey please contact us at info@earsc.org

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Background

As mentioned in the Introduction, the present study, the **Start-up Survey 2021**, is associated with the [EARSC Industry Survey 2021](#). It complements the main survey by focusing specifically on start-ups. The two surveys share certain basic questions (e.g. on turnover and employees), but the start-up survey also collects information specific to issues and challenges faced by new businesses. None of the valid replies came from companies not in our database, giving confidence in its extensive coverage.

The **Start-up Survey 2021** is dedicated to understanding the position, state and health of these young companies, and constitutes a deliverable of the SEBS study for the European Space Agency. As such, it also acts as a follow-up to the SEBS [Innovation and Start-ups Survey 2019](#). The latter survey focused on business models and technological/entrepreneurial maturity (i.e. employment and revenue data were not collected), which included pre-commercial activity as well as that carried out by legal entities (start-ups and established companies). Its scope is therefore somewhat broader than the present survey, although several areas of overlap are identified and discussed.



[Innovation and Start-ups Survey 2019](#)

Followed up by



Start-up Survey 2021

[EARSC Industry Survey 2021](#)

Carried out in parallel and as complementary surveys