

Introduction

EARSC, the European Association of Remote Sensing companies, is conducting its industry survey to map the state and health of the companies providing EO services in Europe. We conduct a full survey every 2 years with an annual update for some of the key figures. The current report can be found here and previous reports can be found in the library at [the following link](#).

The series of reports are very strongly appreciated by European stakeholders (European Commission, European Parliament, European Space Agency) as well as national representatives and they represent an extremely important tool for projecting the sector and to influence policy decisions (for example concerning the next phase of Copernicus). Please take the time to complete this core survey the opinions and trends collected are widely used and the more companies which respond the more solid are the results.

We are more than happy to discuss our findings with companies and institutional stakeholders. Do not hesitate to contact us if you wish to do so at info@earsc.org. We do not store any personal data along with the survey results and, if you provide your contact details which is an option at the end of the survey, this data will be separated from the company data and stored separately to the survey response to ensure your privacy is respected.

GUIDELINES

Once past the first page you can go right through the survey and/or you can return to complete the survey on several visits. If you wish to get an overview of the entire survey you can download it in [pdf form](#).

Use of the data: The data you provide using this survey will strictly be seen only by the EARSC project team. The data you provide here will NOT be presented to other parties or made public - only cumulative or statistical formats (totals, averages, variances, etc) of the data provided by all of the respondents will be presented, to ensure that no confidential data is revealed. All data collected will be held under password protected and secured control and every effort will be taken to ensure that it is secure. We are continuing to use survey monkey as our survey tool.

Scope of the survey: we are seeking inputs from companies for whom satellite-derived EO data is part of their business. These may be satellite operators, EO service providers, Geospatial information providers or internal service departments inside companies engaged in an entirely different business e.g. oil&gas, insurance, construction etc.

Data should be for the last full financial year i.e. 2020 whenever it is possible.

We open the survey now to provide you with enough time to give us accurate information. We will leave it open until February, but we would appreciate your response as early as possible, consistent with the availability of good data.

POINTS OF CONTACT

Please feel free to contact EARSC at any time if you have any questions; Delphine Miramont, EARSC

Policy Officer (delphine.miramont@earsc.org)

Thank you for completing this EARSC industry survey!

Click on the "next" button to continue the survey. You can close the survey window and come back to it to complete information at any time by clicking on the link in the email you were sent.

Section 1 - Company information

* 1. What is the name of the company?

* 2. In which country is your company located ie the legal entity for which you work? (note that all other questions relate to this entity)

3. Is your company privately owned? Are you a subsidiary of another company?

Privately owned

Publicly traded shares

Wholly / majority owned by another EO company

Wholly / majority owned by another industrial company

Wholly / majority owned by an investment company

Wholly / majority owned by a government, academic or other public organisation

Section 2 - About your company

The questions below concern activities which are "EO-related" by which we mean: business activities which use or are linked to the use of data coming from EO satellites; including downstream activities from data reception and processing, the supply of geospatial products and services, the supply of consulting, hardware or software including "as-a-service".

* 4. How many employees do you have? Are all these concerned with "EO-related" activities? If not, how many of them are?

Total employees

Total EO related employees

* 5. Considering the EO related workforce, what percentage is female?

0 100

6. Again, considering the "EO-related" workforce, please estimate the percentage of employees qualified at different levels (%)

School/ higher non university

1st (bachelor) degree

Post-grad./ Master degree

Ph.D.

* 7. What trend do you expect in your company's number of "EO-related" employees over the next 12 months?

Significant decrease

Slight increase

Slight decrease

Significant increase

No change

Section 3- Financial information

* 8. For the legal entity listed in Q1, what was your total revenue for 2020 or the last full financial year (in KEuro)? A 10% approximation is adequate for our purposes

* 9. Is the revenue given in response to Q8 completely coming from sales of "EO-related" products and services? If not, what percentage is directly related to EO products and services?

* 10. What are your main areas of activity? Please estimate the percentage of business "EO-related" revenues (as given in response to Q9) coming from each of the activities listed below (filling where appropriate)

	0%	10%	20%	50%	75%	100%
Satellite operator (data sales)	<input type="radio"/>					
EO data reception and distribution (owner of operator of a ground station)	<input type="radio"/>					
Other data acquisition (e.g. in-situ, UAV)	<input type="radio"/>					
Data reseller (satellite data from third party sources)	<input type="radio"/>					
Value adding services (company using satellite data to generate products)	<input type="radio"/>					
Downstream/GIS services (main business not in EO but using some satellite data)	<input type="radio"/>					
Consultancy (studies / analyses which are not VA services and other support activities)	<input type="radio"/>					
Hardware / Software (including their provision "as-a-service")	<input type="radio"/>					

11. In the last year, approx. how much did you spend on the purchase of EO data?

2020 total data costs (€K)

12. Could you give an indication of the profitability of your company?

- | | |
|-----------------------------|------------------------------|
| <input type="radio"/> 0-1% | <input type="radio"/> 10-20% |
| <input type="radio"/> 1-3% | <input type="radio"/> >20% |
| <input type="radio"/> 3-6% | <input type="radio"/> Loss |
| <input type="radio"/> 6-10% | |

* 13. What trend do you expect in your company's "EO-related" revenues over the next 12 months?

- | | |
|--|--|
| <input type="radio"/> Significant decrease | <input type="radio"/> Slight increase |
| <input type="radio"/> Slight decrease | <input type="radio"/> Significant increase |
| <input type="radio"/> No change | |

* 14. Do you have European subsidiaries and are their figures included in the above responses?

- Yes (included)
- Yes (not included)
- No

Section 4- Market

* 15. In which market sectors are you doing business? Please can you give us an indication of the percentage of your business (as reported in response to Q9) in each category (approximation to nearest 10% is already valuable for us)?

EO service providers	<input type="text"/>
Agriculture	<input type="text"/>
Forestry	<input type="text"/>
Maritime	<input type="text"/>
Renewable energy	<input type="text"/>
Oil & gas	<input type="text"/>
Raw materials	<input type="text"/>
Infrastructure	<input type="text"/>
Insurance and other services	<input type="text"/>
Urban development	<input type="text"/>
Defence and security	<input type="text"/>
Environmental ecosystems & pollution	<input type="text"/>
Citizens and society	<input type="text"/>
Comments	<input type="text"/>

* 16. In which geographic areas are you doing business? Roughly what percentage of your revenues (as reported in response to Q9) come from the following areas/regions?

Domestic (your home country)	<input type="text"/>
Rest of Europe	<input type="text"/>
North America	<input type="text"/>
South America	<input type="text"/>
Middle East	<input type="text"/>
Asia	<input type="text"/>
Russia/ CIS	<input type="text"/>
Oceania	<input type="text"/>
Africa	<input type="text"/>

* 17. Which are your main customer types? Could you give us an indication of the percentage of business (as reported in response to Q9) in each category?

Public sector (National / European)	<input type="text"/>
Public sector (Local and regional)	<input type="text"/>
Public R&D sponsor (FP, H2020, ESA, National Agency)	<input type="text"/>
Private company	<input type="text"/>
International organisations (including NGO's)	<input type="text"/>
Academia	<input type="text"/>
General Public	<input type="text"/>

18. For value added services, how are these services processed? Please can you give us a rough percentage of your total business (as reported in response to Q9) in each category?

fully automated geospatial web services (i.e. no human intervention in the end-to-end workflow from subscription to delivery Off the shelf - "Build once Sell many")

semi-automatic geospatial services (i.e. limited human intervention - subscription and delivery using web services but production and/or quality control done with human intervention)

bespoke geospatial services (i.e. full human intervention - traditional project approach to create products tailored to the needs specified by one customer)

19. For data and value added services, what percentage of your business (as reported in response to Q9) comes from online order entry?

Data

Value-added services

20. Future Technology Path: Do you have plans to work with Artificial Intelligence (AI)?

- AI is at the heart of my business strategy.
- I am already using AI in my production line of products and services
- I am doing some research into AI techniques
- I am watching the development of AI carefully to judge my use in the future
- I do not consider AI will be useful for the business I am in
- Other (please specify)

Section 5- Barriers and Challenges

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

- lack of operational data supply
- lack of development funding
- lack of venture capital
- cost of EO data
- market / user acceptance
- competition from other EO suppliers
- competition from public organisations
- competition from non-EO sources
- lack of staff
- finding new customers
- late paying customers

* 22. What are the most significant barriers related to customer uptake? Please pick the two most relevant responses.

- Lack of awareness of the utility of EO applied to their business processes
- Aware, but not convinced that EO provides them with a business solution
- Lack of conviction to make a switch from non-EO based solutions
- Cyclical industry undermines any long-term commitment
- EO is only part of the solution and customer are not prepared to invest to develop a total solution
- Solutions seen as too complex
- Other (please specify)

23. How has the COVID-19 pandemic affected your business revenues?

- Strong decrease (>-10%)
- Decrease (-10%)
- Not at all
- Increase (10%)
- Strong increase (>10%)

24. Concerning the other impacts of the Covid-19 listed below, could you tell us if they already have affected you and/or if you expect them to affect you in the future?

- Lost Investment
- Led to new products or services developed
- Termination of employee contracts
- Closure of business
- Difficulties adapting to home working
- Reduction of contractors/subcontractors
- Other (please specify)

Section 6- Copernicus

* 25. Are you currently using Copernicus data in your business?

- Sentinel-1 : C-Band SAR
- Sentinel-2 : MSI
- Sentinel-3 : SLSTR
- Sentinel-3 : OLCI
- Sentinel-3 : SRAL
- Sentinel-3 : MWR
- Sentinel-5 : TROPOMI
- None of the above
- Comment

26. Which of the new Sentinel missions (listed below) are of most interest for your business?

- CHIME (Copernicus Hyperspectral Imaging Mission)
- CIMR (Copernicus Imaging Microwave Radiometer)
- CO2M (Copernicus Anthropogenic Carbon Dioxide Monitoring)
- CRISTAL (Copernicus Polar Ice and Snow Topography Altimeter)
- LSTM (Copernicus Land Surface Temperature Monitoring)
- ROSE-L (L-band Synthetic Aperture Radar)
- no idea

27. Are you participating to the supply of Copernicus services? If yes, which ones?

- | | |
|---|---|
| <input type="checkbox"/> Land (except Global land and European Ground Motion Service) | <input type="checkbox"/> Atmosphere |
| <input type="checkbox"/> Global land | <input type="checkbox"/> Security |
| <input type="checkbox"/> European Ground Motion Service | <input type="checkbox"/> Climate Change |
| <input type="checkbox"/> Emergency services (except Rapid Mapping) | <input type="checkbox"/> Rapid Mapping |
| <input type="checkbox"/> Marine | <input type="checkbox"/> No |

* 28. What percentage of your revenues currently depends on direct contracts coming from Copernicus?

	0%	10%	20%	50%	75%	100%
Data	<input type="radio"/>					
Services	<input type="radio"/>					

29. What percentage of your revenues depends on the use of Copernicus data and services in value-added products/services?

	0%	10%	20%	50%	75%	100%
Data	<input type="radio"/>					
Services	<input type="radio"/>					

* 30. Please estimate the impact of Copernicus on your business, now and looking on the future, on a scale of -5 to +5.

	-5	-3	0	+3	+5
Present impact	<input type="radio"/>				
Expected future impact	<input type="radio"/>				

31. What route do you most frequently use to access Copernicus data?

- Amazon Web Services
- DIAS (Data and Information Access Services)
- Copernicus Open Access Hub
- National Hubs
- As a partner in the Copernicus services
- Sentinel Hub
- Google Earth Engine
- Other (please specify)

32. Given your response to Q31, could you tell us the reasons why you are using this platform?

- Costs
- Easy access
- User friendliness
- Unaware of alternatives
- Convenience / used from the beginning
- Corresponds to my technical needs
- Other (please specify)

33. Have you used the DIAS (Data and Information Access Services)?

	ACCESSED/TRIED	USED (FOR COMMERCIAL PURPOSES)
CreoDias	<input type="checkbox"/>	<input type="checkbox"/>
Mundi Web Services	<input type="checkbox"/>	<input type="checkbox"/>
ONDA	<input type="checkbox"/>	<input type="checkbox"/>
Sobloo	<input type="checkbox"/>	<input type="checkbox"/>
Wekeo	<input type="checkbox"/>	<input type="checkbox"/>

34. About the ESA initiatives listed below, could you tick where appropriate?

	Aware	Participating to	Intend to participate
Digital Twin Earth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ESA Φ-lab	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
InCubed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Thematic Exploitation Platforms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

35. Please provide us with any comment or input you may have regarding the Copernicus programme

Section 7- Professional skills needs

* 36. As employers, could you estimate how easy or difficult it is to fill open positions with qualified employees?

- No problem at all
- Slight difficulties
- Significant difficulties
- Impossibility to fill open positions
- Not applicable (we are not currently recruiting)

37. If you find difficulties to fill open positions, could you tell us why do you struggle? (for example: individuals lack sufficient transversal skills or business-oriented skills, attracting applicants is difficult...)

38. What technical skills are currently lacking in your organisation?

- Space/ Geospatial Data (access to data resources)
- Data Capture and Management
- Analytical Methods
- Integration of space with ground-based data
- Programming and Development
- Computing Resources and Platforms
- Visualization and cartography
- Organizational and institutional aspects
- Markets and societal needs understanding
- Other (please specify)

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39. If there is a matter you wish to discuss or if you need more information about the survey, could you please share your contact details with us so we can come back to you? This will be appreciated.

Name

Email Address

Phone Number

40. Do you have any additional comments to make us regarding your business, your view of the sector or feedback regarding the survey?