



EARSC

European Association
of Remote Sensing
Companies

**Annual
Report
2021/2022**

2021/2022 | Fact sheet

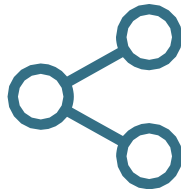
EO Network

Members



136

Organised conferences / workshops



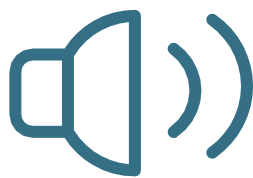
31

Successful EOcafes



18

Speaking opportunities & presentations



26

Virtual exhibition booths



40

Milestones

- On the 16th and 17th of June 2021 EARSC held the annual EXPANDEO 2021 & the FIRE Forum as a successful two-day event featured 13 sessions, 70 speakers and attracting more than 830 people
- 14 EARSC statements were provided to the European Commission Open Consultations
- Throughout 2.5 years of the acceleration programme PARSEC supported 113 SMEs, including 15 EARSC members!
- 25 guest speakers and 2471 registrations in EOcafe
- User needs gathered from 70 more participants across the 6 FIRE sectors

>47,000 visits &
34,000 users
EARSC
website

5,799 Twitter
followers
13.3%
increase

>21,000 EARSC portal
clicks

3,154
LinkedIn
followers
55.3%
increase

Chairman's message

I am glad and honoured to report for the first time as Chairman on the activities of EARSC for the period June 2021 to now.

It was still a complex year with a lot of constraints linked to the Covid situation: difficulties in travelling and physical meetings holding, and also restrictions on the physical attendance of the secretariat imposed for more than one year, which made it still challenging to recover normal working conditions, with the entire team gathered in the EARSC offices.

Fortunately, this Covid crisis did not affect too much the activities of our EO downstream industry, at least during the 2020 year, as reflected in the last industry survey report, certainly thanks to the strong support maintained by the European institutions. We hope that it has also been the case for 2021 (the analysis of the 2021 results is still ongoing). Still, we know that, at least for some EARSC SMEs and start-up companies, the situation is worrying, precisely due to the difficulties faced by some of their commercial customers and in developing some international activities.

Despite these difficulties, the Association has continued to implement a diverse range of projects and activities supporting its members. The EARSC Secretariat, now composed of 11 full-time people, has maintained relationships with key stakeholders and interacted with key communities. Although the pandemic has impacted the representation at stakeholders' events and internationalization efforts, making it impossible to attend the usual array of meetings and workshops physically, implied redesign of some tasks to achieve their goals, with sometimes some necessary adaptations, as for the ConnectEO project for example.

Some of the key highlights of the year include:

Membership: The Association has grown to reach **136** members. Several new full members joined the Association via the trial membership scheme, which is particularly beneficial for connecting with small companies and start-ups.



Market Development: travel restrictions severely curtailed internationalization activities; nevertheless, we continued to pursue the strategy initiated three years ago with the IDEEO project and continued with the **ConnectEO** project this year which linked Members interested in developing business and partnerships in Australia and Chile with local stakeholders in these countries.

Through the project **e-shape**, financed with the support of the EC, EARSC intensified the promotion of European capabilities within European Commission DGs and GEO. The onboarding provided opportunities for companies to benefit from this ecosystem.

Besides these two projects aiming at boosting business opportunities for our members, a significant effort has been deployed by the secretariat team this year to be proactive in supporting the preparation of new sectorial European Policies, to highlight what could be the contribution of Earth Observation in the implementation and the monitoring of these policies. An example of this activity was the preparation, with the support of several EARSC

members, of a dedicated position note presented to the relevant EU Directorate to describe the benefits of EO applications in designing the European forestry strategy under preparation. This kind of activity will be pursued this year in other thematic domains to systematically assess how Earth Observation is a valuable tool in helping the various EU Directorates in their respective strategic policies definition and monitoring.

Chairman's message

Stakeholder engagement: EARSC has continued to build strong relationships with key stakeholders in our sector. We have engaged at senior levels within DG DEFIS and built our relationships with the European Entrusted Entities for Copernicus and the newly formed EU Agency for the Space Programme or EUSPA. In this sense, we are finalizing the elaboration of a cooperation memorandum document with ECMWF and implementing periodic collaboration meeting points with EUSPA.

Our relationship with ESA remains particularly strong. Many of you have participated in the dedicated ESA-Industry event held in April 2022 to prepare for the CMin 2022, where senior representatives of the EO directorate at ESA listened to the concerns and needs of our sector. We have also achieved an agreement with ESA for commonly monitoring the involvement of the European EO downstream Industry in the development of the ESA projects, with Key Performance Indicators to be periodically delivered.

Sector analytics: Following strong interest from external stakeholders and EARSC member companies, the industry survey has become an annual exercise, giving more granular data on how the sector progresses year on year. Therefore, the industry survey report became an annual publication, with a condensed version published in alternate years with the extended one.

EARSC published a full report in the summer of 2021 and will issue a second condensed version in 2022.

Research to business: Building on previous achievements, EARSC gathered together a broad community of start-ups and strong interest from the EC and ESA. The beneficiaries of our PARSEC project – including six EARSC members – formed 15 consortia to get access to funds and training. EARSC members had the opportunity to join several workshops designed for PARSEC beneficiaries. Parallel to this, FIRE is our industry-led Forum for Innovation and Research in European Earth Observation, aiming to become the bridge between users and Earth Observation services and data. I hope many of you will join our FIRE Forum and EXPANDEO events in June 2022 to learn more.

Speaking of EXPANDEO, I must recall that our 2021 event was a great success, with 492 virtual attendees. Fortunately, we can return to a physical event or, more precisely, a hybrid one this year where the whole community - suppliers and customers - can come together or have the possibility to follow remotely.

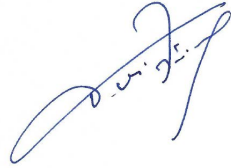
I hope that this event will progressively become a 'must attend' for our community.



In conclusion, I would like to note that 2021 was my first year as Chairman of the board of the Association. It has been both an honour and a privilege to serve the Association this year, despite all restrictions and difficulties linked to the Covid crisis recalled above. We have still a lot to do to support the development of our EO downstream European Industry. I am sure that I will have the full support of all board members who will be elected during this AGM and the secretariat team.

Lately I want to recall that all EARSC members can act for supporting our actions, in particular by participating in the various working groups set up by the board in which all members of our Association are more than welcome to take part to help develop our common EO downstream business.

Marc Tondriaux,
Chairman of EARSC



About EARSC

EARSC represents the Earth Observation (EO) geo-information services companies in Europe. Our members include both commercial operators of EO satellites and downstream, value-adding companies. These companies are global leaders in the provision of EO services and our members are at the forefront of this.

EARSC Membership

EARSC has **136** members from **24** European countries and **1** non-European country. For companies, the annual membership dues are a cost-effective way to stay informed, promote their companies, engage with political and institution representatives, have networking opportunities with other industry players and help to support the future of the geo-information industry.

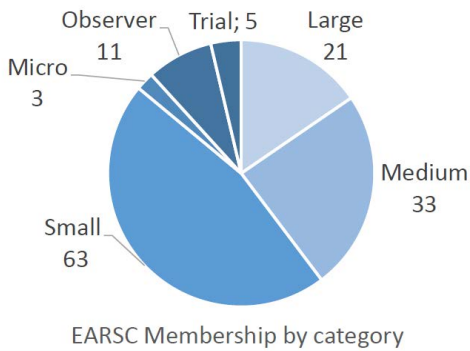
EARSC has both full and observer members to cover all entities active in the geo-information sector. Membership gives you the opportunity to add your voice to the issues that matter, influence national policy and setting industry standards.

Full members shall be:

- Any commercial company providing services, including consultancy or supplying equipment in the field of remote sensing,
- Based in a European country, which is a member of the European Union or which contributes to the European Space Agency.

Observer members can be:

- Any organisation interested in the supply or use of Remote Sensing which does not qualify to become a full member of the Association.



Profile	Employees in EO and geo-information	Yearly fees
Trial, new companies formed in the last five years	Less than 11 employees	6 months free
Small companies	Less than 11 employees	€900
Medium companies	11-50 employees	€1,800
Large companies	More than 51 employees	€3,000
Observers	-	€1,200

Trial Membership

EARSC has always been dedicated to supporting the growth of startups through various projects and events. Since 2019, we established the free trial membership scheme that enabled us to build better connections with the small companies. Trial members can get access to all of EARSC's resources for free for six months to evaluate the value to become an EARSC member. To your right is the full list of new members including trial ones since April 2021 till May 2022.

New members in 2021/2022

Full members

Aratos Systems (the Netherlands)
 Cropix (Switzerland)
 ECOTEN (Czech Republic)
 EOMAP (Germany)
 GEOSAT (Portugal)
 GEOSCAN (Germany)
 Hybrid Airplane Technologies (Germany)
 KAYRROS (France)
 Maysay.ai (Germany)
 MESASIGHT (Germany)
 Murmuration (France)
 MGPP (Poland)
 OHB (Germany)
 Satellogic (Spain)
 Sfera Technologies (Bulgaria)
 Spectro-AG (the Netherlands)
 UP42 (Germany)

Observer members

Luxembourg Institute of Sciences and Technology (Luxembourg)

Spacety (Luxembourg)

Trial Members

Aspia Space Ltd (UK)
 Detektia Ltd (Spain)
 Hybrid Airplane Technologies GmbH (Germany)
 MESASIGHT GmbH (Germany)
 TotalView (Greece)

Governance

EARSC affairs are overseen by a Board of Directors elected by its members which guides our policy-making, and by an Executive Secretariat which executes the daily activities regarding the administration of the Association.

Secretariat

The Executive Secretariat is composed of 11 full-time staff which operates mostly remotely in 2021 with a partial return to the office in November. The EARSC secretariat's activities include: operations management and governance, membership care, programme management, communications, policy analysis, event planning, tender preparation, and market development through market support and internationalisation. Much of the activity is delivered through projects which are often won competitively.

Board of Directors

Oversight of the actions of the Secretariat and the activities of the Association is provided by the EARSC Board of Directors (BoD). The BoD meets quarterly to progress EARSC business and to review the service it is providing to EARSC Members. Each year new Directors can be nominated by members on the occasion of the General Assembly. In June 2021, the three officers (Chairman, Vice-Chairman and Treasurer) were nominated by the elected Directors for a period of three years.

EARSC Board of Directors 2020/2021		
Chairman	Marc Tondriaux	Terranis
Vice-Chairman	Giovanni Sylos Labini	Planetek Italia
Treasurer	Celestino Gomes	GMV
Director	Pierre-Alain Bosc	Airbus
Director	Christian Hoffman	Geoville Group
Director	Kamen Illiev	TAKT IKI
Director	Andre Jadot	Eurosense
Director	Maciej Krzyzanowski	Cloudferro
Director	Agnieszka Lukaszczyk	Planet
Director	Markus Probeck	GAF
Director	Pascal Schichor	European Space Imaging
Director	Chetan Pradhan	Earth- i
Expert Advisor	Marcello Maranesi	Independent
Expert Advisor	Geoff Sawyer	Independent

Financial Situation

EARSC is based on a mixed business model of membership fees and projects covered by grants. We wish to see members' revenues growing to balance the uncertain nature of projects and their natural life cycle. EARSC

was involved in 10 projects in 2021, started 1 called Harmonia and ended 3: OCRE, EOEPKA and PARSEC Accelerator, in December. 2021 was a year of transition between Horizon2020 and Horizon Europe Calls.

EARSC, currently involved in 7 projects, is a partner in consortia carefully selected to provide higher value for members. We are waiting for the evaluation results in Q3 2022.

The key operating concern is cash flow, which is managed and watched very carefully. With the increasing Secretariat and essentially fixed costs which need to be covered.

As people started to go back to the office and EARSC contributed to some events, the office and other costs composed mainly of fixed costs and representation costs increased slightly but are 40% lower than before the pandemic. Secretariat cost was planned a peak in 2021 but increased a bit more than planned with the hiring of two short term contracts to support tasks in projects, maternity leaves, and hand over periods. In 2022, the Secretariat cost is planned to reduce next year close to the amount of 2020.

As a result, we report a deficit of 7k€ this year.

All figures in €k	2021	2020
Revenues	985,5	912,9
Membership fees	171,87	147,262
Contracts & Grants	804,56	739,02
Other income	9,05	26,609
Expenditures	1066,08	888,131
Secretariat	775,51	714,553
Office and other costs	109,04	76,677
Projects costs	175,74	91,521
Audit & accounting	5,79	5,38
Accrual	73,26	
Net Result	-7,34	24,76
End of year reserves	166,97	174,31

Policy Observatory

The European Union (EU)'s policies cover a wide range of areas which require an abundance of resources including reliable and accurate data and services powered by innovative technologies. In the context of the **green and digital transition**, also known as the EU 'twin transition', it is becoming increasingly important to maximize the policy uptake of innovative services and products based on Earth Observation (EO).

By offering a broad-range of products and services in various business sectors and applications, the Earth Observation services industry can provide **operational solutions supporting the objectives of a number of EU policies**. Indeed thanks to unprecedented technological innovations EO services now allow policy and decision-makers to identify risks, tailor policy response and resource allocation, monitor progress and identify trends.

The role of the EARSC Policy Observatory is to **monitor relevant EU policies and take action to advocate for an increased use of the EO services to support policy-makers**. By gathering the inputs of EARSC members on how the downstream EO sector can contribute to various EU initiatives, the Policy Observatory will work to include the EO capabilities contributing to the achievements of European policies (see the table with the consultations and EARSC Statements).

In this context, the EARSC **Green Deal Working Group** was launched in December 2021 to provide a clear and coherent position of EARSC members on how the EO services industry can contribute to the Green Deal-related policies. The Working Group has identified three priorities to focus on during this initial period: methane monitoring, carbon removal and forest management. Consequently, three subgroups have been created gathering member's views on the European Commission's proposals on methane leakage in the energy sector, the certification of carbon removal and Deforestation-free products. In order to gain influence and convey the industry's recommendations, EARSC has met with representatives from DG DEFIS, DG ENV, DG CLIMA, DG GROW, DG ENER, Members of the European Parliament and members of the Council of the EU. EARSC is ensuring awareness of the industry contribution responding to the EC Consultations on the Green Deal implementation.

Social Media



EARSC Twitter presence reached **5,799 Twitter followers** this year. We continued connecting with the EO community, welcoming new members, reaching out to our partners and stakeholders via this main EARSC social media network.

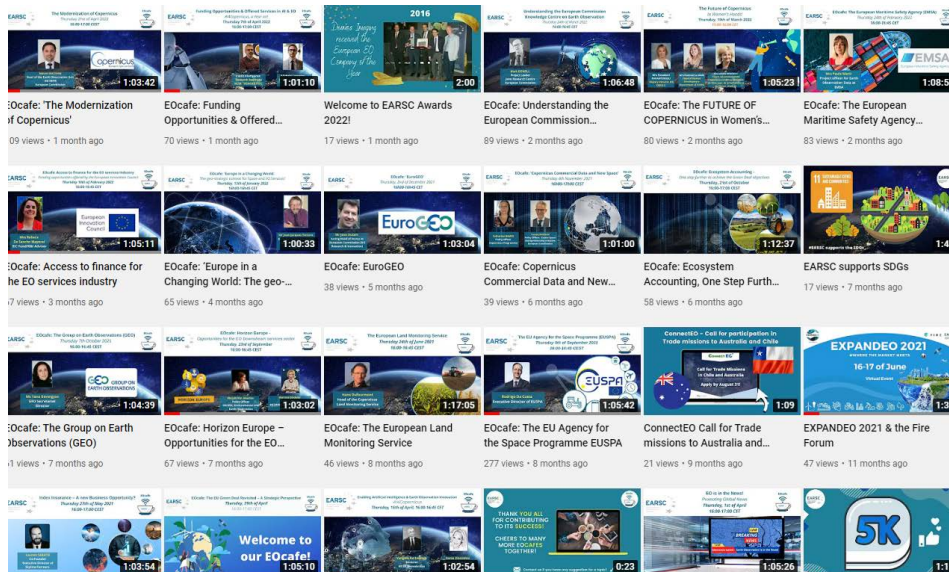
Twitter & LinkedIn

EARSC LinkedIn presence continued growing and this year we reached **3154 LinkedIn followers**. We continued organising influential social media campaigns, promoted our **EOcafe** recordings, the job vacancies of our members and welcomed our new members.





This year we started to actively develop our YouTube channel, which was not active before, and this has been warmly welcomed by our members and by the EO community. This year we reached **125** followers on YouTube. We continue to use this platform to publish the recordings of our EOcafes online, which are being viewed by the community later.



eoPAGES is a brokerage platform to help potential customers find suppliers whilst service providers are able to promote their products. The Earth Observation value added Industry is quickly evolving with an ever-growing pool of resources and services. eoPAGES is our unified tool to organize, catalogue and present these in a coherent manner. It is being designed for this purpose. It will be an active business-to-business website promoting the European geo-information service industry creating a meeting point between industry and market, focusing on competences and consultancy services; *1 product = 1 customer. (eopages.eu)*



eoMALL is a web-based technological showcase of European Data & Earth Observation Services providing access to referenced and qualified companies and products/ services. Through various kinds of search tools (thematic, market sectors, geographical area customers easily identify available services (*information, service, tools, etc.*), which our members can provide. eoMALL provides visibility to mature, automatically-generated based EO-products, and provides the customer with a channel to find online services on platforms run by its members. In addition, eoMALL gathers market information by profiling visitors to the website, which will be shared between partners to help with market research and product development. The focus is on online services *i.e. 1 product = many customers. (eomall.eu)*



In 2021 EARSC published its 6th Survey on the State & Health of the EO services industry. It is the result of a direct research on 600 companies and a survey sample of 150 companies. You can find previous reports at www.earsc.org.



SeBS

Through a series of economic impact studies, EARSC aims to analyse and showcase the **quantitative** and **qualitative** benefits that the Copernicus Sentinel data deliver to various (emerging) markets. These analyses are based on a methodology which traces the impact of the use of an EO product or service along a value-chain. These case studies explain the impact and benefits of Copernicus data in the following 6 dimensions:

- economic
- regulatory
- science & technology
- environmental
- entrepreneurship & innovation
- societal



Over the last year, we published the long cases Deforestation Monitoring for Sustainable Palm Oil Production, Water Quality Management in Germany and Highways Management in Italy as well as the cross-cutting report on Copernicus Sentinel data and Environmental Compliance Assurance that showcases examples of regulatory benefits. These and our previous case studies help us to promote the benefits of EO and the Copernicus programme in front of European institutional stakeholders as well as private sector organisations from a wide range of sectors and markets. Furthermore, in November 2021, we organised the **SeBS Final Results Workshop** in which we also presented the newly created summarising videos for each case, and in September we presented the project's key results i.e. the various benefits of Copernicus data at the Copernicus User Forum. SeBS also continues to be introduced to the GEO work programme through the GEOValue activities. All key results and case studies can be accessed at www.earsc.org/sebs.



Connections with communities

EARSC contributed to the United Nations Committee of Experts on Global Geospatial Information Management (UN-GGIM) Annual Assemblies providing Statements to diverse agenda items (i.e, eleventh session web-site).

EARSC is a Participating Organisation to GEO and works with the Secretariat on many topics including; (i) the EO4SDGs initiative encouraging the vision to facilitate a shared understanding of how geo-information can help business sectors to support most effectively the achievement of the SDGs (ii) contributing to the GEO Capacity Development working group and drafting the draft report "Mapping the Engagement of the 2020-2022 GEO Work Programme in Capacity Development, Disaster Risk Reduction and Climate Action" with the overall purpose of the report is to inform the effective development of the next GEO Work Programme 2023-2025 (iii) We are strongly committed to helping build engagement between GEO and the European industry and organise relevant meetings alongside the GEO Plenary which is held each year. EARSC has been involved in the Committee of Regions Stakeholder's consultation on Amending the Renewable Energy Directive to meet the new 2030 Climate Targets.

Additionally, EARSC contributed to defining the strategic priorities that must be addressed at the UN Secretary-General's Roadmap 2022-2025 on Digital Cooperation through its engagement with the **Coalition for Digital Environmental Sustainability (CODES)** initiative.

Earth Observation can support several targets and indicators in the UN SDGs framework by providing accurate and reliable data on the state of natural resources, biodiversity, atmosphere, oceans, etc. The EARSC eowiki/SDGs presented a comprehensive section identifying EO services from private sector providers that help support goals and targets and ultimately with the monitoring and reporting of the SDGs. It highlights cases where EO technologies are contributing to a set of goals covering the social and economic dimensions of sustainable development.



Moreover, the Sector Skills Strategy (SSS) was highlighted by DG DEFIS as a key document defining a vision and mission, but also a set of goals and strategic objectives for skills and workforce development in the sector. The ontology-based Body of Knowledge is widely used in the dynamic collaborative platforms with associated tools (job-offer, occupational profile, annotation, matching, curriculum-design). More training materials covering resources for educators/instructors were developed and case-based training actions were designed around several learning scenarios in climate change, smart cities and integrated applications. **EO4GEO Alliance** is being formalised as a Large Partnership under the EU Pact for Skills.

Last but not least, the Industry-led Forum for Innovation and Research in European Earth Observation connects the industry leaders and professionals who came virtually together on the 16th of June 2021, for the 1st FIRE Forum to discuss challenges in key sectors (Agriculture, Energy, Infrastructure, Raw Materials, Marine/Maritime, and Urban Development) and solutions Earth Observation (EO) can bring to them. The FIRE Forum event was held alongside EARSC's annual EXPANDEO conference as a successful two-day event featuring 13 sessions, 70 speakers and attracting more than 830 people. FIRE announced also the first EO Evangelists and concluded the last round of targeted focus group discussions and opened pre-registration for the FIRE Forum 2022.

FIRE

The FIRE project achieved three key milestones this year. On the 16th of June 2021, industry leaders and professionals came virtually together for the first FIRE Forum. Sustainability, resilience, and digitalisation were at the core of the discussions with users on the sectorial challenges, user needs, and how EO can empower these sectors to make informed decisions and timely interventions. With an average of 40 participants for each of the six thematic sessions, a wide range of insights on trends, challenges and opportunities was exchanged.

During this large-scale event were publicly announced the winners of the Open Call for the Earth Observation Evangelists. Seven sectoral Earth Observation Evangelists, the “influencers” of EO uptake in their sectors were announced: Dr Ilias Pechlivanidis for Agriculture, Mrs Miriam Gonzalez for Energy, Mrs Lucy Kennedy for Infrastructure, Dr Eva Haas for Marine, Dr Juan Peña for Maritime, Mrs Irene Benito for Raw Materials, and Mr Remco Timmermans for Urban Development.



F I R E

Finally, FIRE also has completed the last focus group discussion series centred around the use of Earth Observation (EO) in each of the target sectors of the project. The outcomes will be integrated in the strategic, high-level roadmap for the Research and Innovation strategy for Earth Observation in Europe. These discussions will also contribute to the second FIRE Forum taking place on the 14th of June 2022. All the updates of the project can be found at (www.fire-forum.eu)

OCRE

The latest OCRE Project developments include the funding distribution opportunities, the Earth Observation catalogue, and the first procurement activities. More specifically, 6 projects were awarded for digital services focused on Earth Observations (EO). OCRE has invited EO companies to register in the OCRE EO Catalogue which aims to create a digital single market for EO services for research in Europe. As a result, the OCRE Earth Observation Catalogue was created which is the reference for shortlisting suppliers to procure services for the EO funding for research winners and giving visibility to Earth Observation service. The first procurement activities have been foreseen in the next weeks. The Secretariat has supported the pre-procurement activities and has been also interacting with its members to inform them about the upcoming opportunities and make sure they are well represented in the process. All the updates of the project can be found at www.ocre-project.eu.

OCRE

ConnectEO had difficulties in its take off due to the Covid-19 pandemic, mainly because its core activities were planned travels to Chile and Australia to hold trade missions and B2Bs. Instead the project took a different approach and decided to go online. Once the strategy changed, the Consortium issued in June an open call addressed to SMEs from the maritime and agriculture sector go to these online trade missions.

From this call, 19 SMEs were selected in October interested in the Chilean and Australian market. These 19 SMEs come from 9 EU countries (Estonia, Ireland, Spain, Luxembourg, the Netherlands, France, Czech Republic, Italy, and Germany). 69% of these have already commercialized products and 70% have already experience in international activities. Since October ConnectEO has held around 2 preparatory activities per month in shape of webinars to prepare them for these trade missions. The topics of the webinars are based on the economic, financial, and legal needs of the SMEs providing them access to knowledge to these markets. All of these webinars were free and open to any actor interested in these markets as well. The recordings are available in the ConnectEO's YouTube Channel. The dates of the Trade Missions and the B2Bs are going to be held starting in May until end of June for Australia and Chile.

Working with Partners

EARSC has signed MOU's with organisations in Japan (**JSS**), Australia (**FrontierSI**), Chile (**Eurochile**), India (**AGI**) and Africa (**AARSE**) and is developing business opportunities for members with them. With the official creation of EUSPA in May, EARSC had monthly interactions with **EUSPA**, which hosted the EARSC Board of Directors in April 2022 to discuss ways to collaborate better and stimulate the uptake of EO downstream data and services. An MoU is under preparation. EARSC also supported the dialogue with the European Entrusted Entities with first meetings and actions with **ECMWF, JRC, EEA and EMSA**. An MoU with ECMWF is also under preparation. EARSC interacted with Commissioner Breton's cabinet and EVP Timmermans to propose actions to leverage barriers to EO-based data and services. The Policy Observatory setup in June 2021 and the Green Deal Working group created in Q4 2021 are catalysts to promote EO downstream capabilities and interact with stakeholders from DGs, the Parliament and the European Council. The booklet of EO services to support the Forest strategy has been instrumental in our capability to interact with new people and increase awareness of current capabilities.

EARSC's long term partnership with **ESA** will be materialised with the provision by ESA to EARSC of metrics for the ESA downstream program. Initiated by Josef Aschbacher in January 2021, Simonetta Cheli confirms the first delivery in July 2022. EARSC also support ESA in the preparation of the C-Min22 contributing with Eurospace on the organisation of a dedicated workshop in April 2022 to collect the view of the Industry. We are a Participating Organisation in **GEO** and work with the Secretariat on many topics, including the Capacity Development working group, the Data Providers group, and GEOValue. We are strongly committed to helping build engagement between GEO and the European Industry and organising relevant meetings alongside the GEO Plenary, held each year.

In Europe, we are a member of **Eurogi** and work closely with **Eurisy, NEREUS** and, **ASD-Eurospace, EARSeL** representing the upstream Industry. We are a recognised business network and have built relationships with several clusters in Europe, such as **Pôle Mer Bretagne Atlantique**.



Research to Business



The Sector Skills Strategy (SSS) was highlighted by DG DEFIS as a key document defining a vision and mission, but also a set of goals and strategic objectives for skills and workforce development in the sector. The ontology-based Body of Knowledge is widely used in the dynamic collaborative platforms with associated tools (job-offer, occupational profile, annotation, matching, curriculum-design). More training materials covering resources for educators/instructors were developed and case-based training actions were designed around several learning scenarios in climate change, smart cities and integrated applications. EO4GEO Alliance is being formalised as a Large Partnership under the EU Pact for Skills. (www.eo4geo.eu)

This year a new project kicked off - **HARMONIA** - a H2020-funded initiative which supports cities and local communities to tackle Climate Change effects. The project consortium composed of 22 partners develops a resilience assessment platform to help urban stakeholders understand and quantify Climate Change effects. HARMONIA platform will offer a user-friendly knowledge base, dispensing detailed information on a local neighbourhood and street level.

This will support local decision making and foster a wide range of applications dedicated to climate adaptation and mitigation, such as Carbon Capture and Storage technologies. HARMONIA with EARSC's contribution will put the EO sector together with urban communities, municipalities, local governments, citizens, and key stakeholders from the urban development area towards greener and more resilient future. (harmonia-project.eu).



e-shape

e-shape develops European Earth Observation services with and for the users supporting research to business and innovation, contributing to the expansion of the EuroGEO initiative.

Three years into the project, EARSC has incremented the uptake of European Earth Observation capabilities through awareness and opening to secondary communities of users; political recognition through the Committee of the Regions in support of the specific needs of public authorities; and relations with non EO users and uptake of the services through data integration and recurrent service users, with GEOGRAMA, IRLOGI, 52North and categories associations like CMPR.

The launch of the second e-shape Call for EO-based Products 2021 with applications from 6 EARSC members, of which 2 have joined the e-shape consortium as partners (MEEO, Murmuration) have enabled EARSC members to join the EuroGEO community and extend their EO services uptake and institutional liaison. (e-shape.eu)



e-shape country workshop: EURISY, EARSC for the e-shape user uptake workshops in the framework of the European Maritime Day 2022 (May 2022)

Throughout 2.5 years of the acceleration programme PARSEC supported 113 SMEs, including 15 EARSC members!



PARSEC acceleration programme finished successfully in December 2021 bringing a closure to an extensive 2-stage accelerator bringing together stakeholders from Food, Energy, and Environment sectors ready to fuel their innovations with Earth Observation. Within the programme, PARSEC firstly supported 100 start-ups and SMEs - **#100PARSEC**, with seed capital of 10,000€ each and holistic support including business, technology, and marketing training, as well as cross-border and cross-sectoral networking.

In the second stage, **#15PARSEC** – 15 cross-border and/or cross-sectoral teams composed of 32 SMEs received further support including business mentoring, numerous pitching opportunities and exposure to investors, as well as financial support of 100.000€ per team.

In total, supported companies received 2.5M€ of direct support, while 15 EARSC members received a significant share of more than 600.000€. In total 4.9M€ was allocated to support innovation among SMEs within PARSEC!

As a result of the programme, 31 new start-ups were established and 98 new jobs were created, while the supported companies created turnover of more than 25M€. The supported teams and companies launched **15 new EO-based solutions** onto the market, contributing to the increasing awareness about the Earth Observation and its potential. PARSEC acceleration programme gave a chance for experienced companies from EARSC network to share their expertise and create links with new start-ups and entrepreneurs. The newly created ecosystem involving numerous stakeholders from the targeted sectors – Food, Energy, and Environment, and the EO community will remain active and will continue to bring value to the EARSC network. (parsec-accelerator.eu)



PARSEC ACCELERATOR #15PARSEC
Open Call 2 winners!

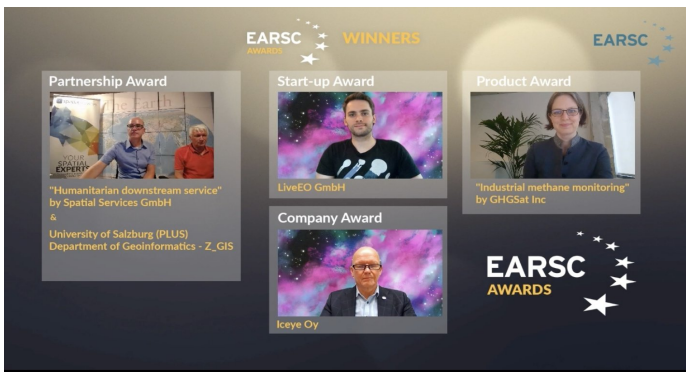
Village Data Analytics Food Energy Environment [Logos: Village Data Analytics, cad]	Crop Predictions Take Flight Food [Logos: computomics, Silengo 00]	OKEANOS Energy Environment [Logos: ORBITALEOS, UBIMET, cmcc s.r.l.]	SNOWi Energy [Logos: ExoLabs, UBIMET, THINK OUTSIDE]	Cottonsurance Environment [Logos: Agurate, OKO]
Copernicus Blue Food Environment [Logos: ansur, VAKE]	POLARIS Food [Logos: POLARIS]	Detecting Aedes mosquito risk areas Environment [Logos: DIPTERON]	Foresight Carbon Environment [Logos: VERHAERT, GGIS]	The Century Project Energy [Logos: greenventory, GREEN URBAN DATA]
ScyscrApp Environment [Logos: ScyscrApp, terranis]	RomEO Energy [Logos: LiveB3, FuVeX]	Healthy Places Environment [Logos: BREEZE TECHNOLOGIES, proximio]	IO3T Food [Logos: EN/IO, loIartic]	Space4Fauna Environment [Logos: Space4Fauna]

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 824478.

PARSEC_EU
PARSEC Accelerator www.parsec-accelerator.eu

EXPANDEO 2021 On the 16th and 17th of June 2021, EARSC held the annual EXPANDEO 2021 & the FIRE Forum, the conference where Earth Observation providers and users from different sectors meet, learn about market evolution and network. The event saw **830 attendees** from public institutions, the Earth Observation industry and other sectors. EXPANDEO 2021 & the FIRE Forum held 2 plenaries, **2 keynote speeches**, **13 sessions with 70 speakers**, as well as the EARSC awards ceremony. EXPANDEO provided **40 virtual stands** to our members, partners, and project leaders.

We recognised the winners of the EARSC Awards 2021: The European Start-Up Award – **LiveEO GmbH**, the European Partnership Award – **“Humanitarian downstream service” by Spatial Services GmbH and University of Salzburg (PLUS) | Department of Geoinformatics – Z_GIS**, the European Product Award – **“Industrial methane monitoring” by GHGSat Inc**, the European Company Award – **Iceye Oy**.



The well perceived, fortnightly EOcafe - where the **EO community meets** – has also **continued this year**. In total we organised 18 EOcafes with 25 guest speaker and 2471 registrants. This year again we tried to cover up-to-the-minute topics and to help our members and all the EO community to better understand what it is happening in the European but also international landscape.



Events



EOcafe

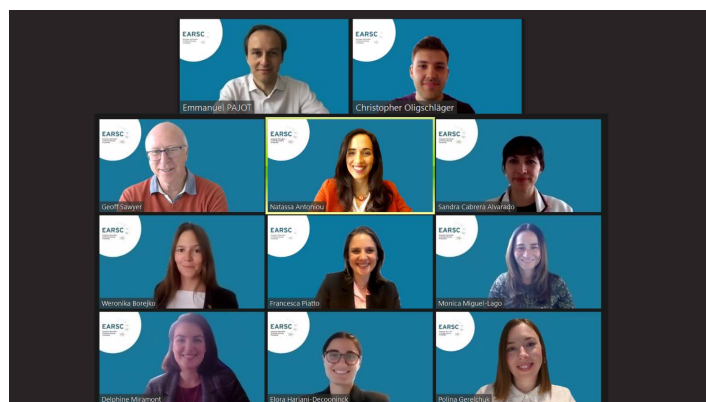


The topics varied from policy (the future/modernisation of Copernicus, Knowledge Centre on Earth Observation, EUSPA), different funding opportunities (HORIZON EUROPE, Casini, EEA tender process, European Innovation Council, AI), market (European Marine Service, European Land Monitoring Service, Insurance) and international initiatives (GEO, EuroGEO), as well as gender balance (Women In Copernicus/Women's Day) etc. The EOcafe will carry on till end of June, then we will break for two months to get ready for the next season. We are welcoming interesting topics' ideas for the autumn/winter season. All the EOcafes can be found **here**.

Focus 2021-2022

EARSC Secretariat The EO industry is growing rapidly and so in order to address its needs, EARSC Secretariat is working hard to support this growth. We would like to take the opportunity to thank each of them for their commitment to our sector.

- Emmanuel Pajot, Secretary General
- Monica Miguel-Lago, Senior Project Manager
- Natassa Antoniou, Project Officer
- Christopher Oligschläger, Analyst
- Elena Bratikova, Office Manager (until January 2022)
- Polina Gerelchuk, Communication Officer
- Aaron Scorsa, Junior Policy Officer (until August 2021)
- Elora Harjani-Decooninck, Project Officer
- Sandra Cabrera Alvarado, Project Officer
- Hermen Westerbeeke, Business Manager (until August 2021)
- Weronika Borejko, Project Officer
- Delphine Miramont, Policy Officer
- Francesca Piatto, Project Officer
- Geoff Sawyer, Strategic Adviser
- Martin Utray, Junior Project Officer (until December 2021)
- Rory Donnelly, Business Manager (until March 2021)



Future activities:

Representing the members: EARSC will continue to link the European Institutions, Copernicus policy, GEO and ESA concerning the industrial policy of Earth Observation. Dedicated efforts will be taken to maintain and launch activities aiming to support the EO industry in the recovery plan.

Market development and internationalisation: EARSC will continue to help the industry access new international markets through trade missions and services and more involvement in GEO.

Showcasing the benefits of EO: Using the Industry Survey, the Sentinel Benefits Studies and a new eoWIKI, EARSC will promote the wide range of capabilities of the European EO industry.

Tools for promoting the industry: Thanks to new eoPAGES and eoMALL, EARSC will continue to give visibility and bring opportunities to the EO European industry.

Research to business: Make use of EARSC involvement in projects such as EO4GEO, PARSEC, FIRE and e-shape to bridge the gap between academia and the private sector and develop synergies.

Exploitation Opportunities: Pursue the goal to offer sustainable support services based on e-shape, PARSEC and FIRE.

Market Development: Develop further links to international partners and to other commercial sectors.

Promotion of Services: Leverage the resources of e-shape and FIRE as well as links with many institutional bodies to promote new EO services.

Testimonials

“EARSC is a key actor for the European Earth Observation industry, because it coordinates and promotes the activities of its members, which are engaged in delivering Earth observation-derived geoinformation services. With EUSPA’s expanded mandate to cover also activities on the utilization of Copernicus, we are looking forward to working with EARSC in fostering the commercial uptake of Copernicus and in maximising the socioeconomic benefits of EU Space for the citizens.

**Rodrigo da Costa,
EUSPA Executive Director**

EARSC provides young European startup like ours with an impressive platform to engage in the Earth Observation and remote sensing ecosystem. The team in EARSC is highly motivated and is dedicated to provide technical as well as business development support to startups such as networking opportunities, visibility, consultation etc.

Sagnik Bhattacharjee, ECOTEN Urban Comfort

Within the EO4GEO project we have been working with **EARSC** colleagues since the beginning more than four years ago and we really enjoyed the collaboration established, both from a professional and human point of view. **EARSC** colleagues greatly contributed to the drafting of the Sector Skills Strategy in the EO*GI domain, and always provided useful insights on remote sensing companies needs and expectations in terms of skills needs for the sector. Also, the activities devoted to the enlargement of the EO4GEO network of networks greatly profited of the EARSC expertise. We are confident this fruitful collaboration on sectoral skills development and consolidation of a large scale partnership will continue within the upcoming EO4GEO Alliance and we are looking forward to it.

Carbonaro Milva, GISIG

EARSC has done a great job in supporting Mayday's European and global expansion, and helped us to further embed into the regional ecosystem. We have benefited from programmes like the Connect EO which facilitated our commercialisation efforts on some key markets. Through EARSC we were also able to contribute to policy-making at the European level, for instance as co-chair in the Working Group on Forest Management. EARSC's staff is service-oriented, goal-driven and caring about their members.

Kian Mirshahi, Mayday.ai

“

With our strong focus on aquatic environments and commercial EO applications we particularly appreciate how EARSC drives the market development. Thanks for introducing novel formats, such as OCRE and FIRE, and selecting an EOMAP team member as the first Marine Evangelist. And a special cheers to your highly motivated and always responsive team!

Eva Haas, EOMAP

“

EARSC has been a key enabler for Murmuration in the Space ecosystem. **EARSC** is helping us navigate through the continuously moving Space industry, especially with the multiplication of actors of the NewSpace. The team is very competent and supportive and the different events, suggestions, coordination with the institutional bodies, and networking among fellow companies are essential for our development.

Tarek Habib, MURMURATION

Copa-Cogeca works to ensure that all farmers and agri-cooperatives have access to a wide range of safe technologies that will enable EU agriculture to improve on sustainability whilst remaining competitive. Working hand in hand with **EARSC** to bring to the public debate the challenges and opportunities for the agricultural sector is a privilege. We work together to identify the farmers' needs and discuss the potential of **EO**.

Daniel Azevedo, Copa-Cogeca

Our Members



European Association of Remote Sensing Companies
 Rue Art Loi 26, 7th floor 1040, Brussels, Belgium
www.earsc.org | info@earsc.org