EARSC Industry Survey 2024

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.

The series of reports are very strongly appreciated by European stakeholders and they represent an extremely important tool for projecting the sector and influencing policy decisions. Please take the time to complete this survey. The opinions and trends collected are widely used and the more companies which respond, the more robust the results. You can find our previous industry surveys by clicking on this link.

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.

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 aggregated or statistical formats (totals, averages, variances, etc) of the data provided by all respondents will be presented.

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 sector of business(e.g., oil and gas, insurance, construction).

Responses should be indicated for the last full financial year (2023), whenever it is possible. We will leave the survey open until March, but we would appreciate your response as early as possible, consistent with the availability of the requested data.

Contact

Please feel free to contact EARSC at any time if you have any questions; Michelle Hermes, EARSC Policy Officer (michelle.hermes@earsc.org)

Thank you for completing this EARSC industry survey!
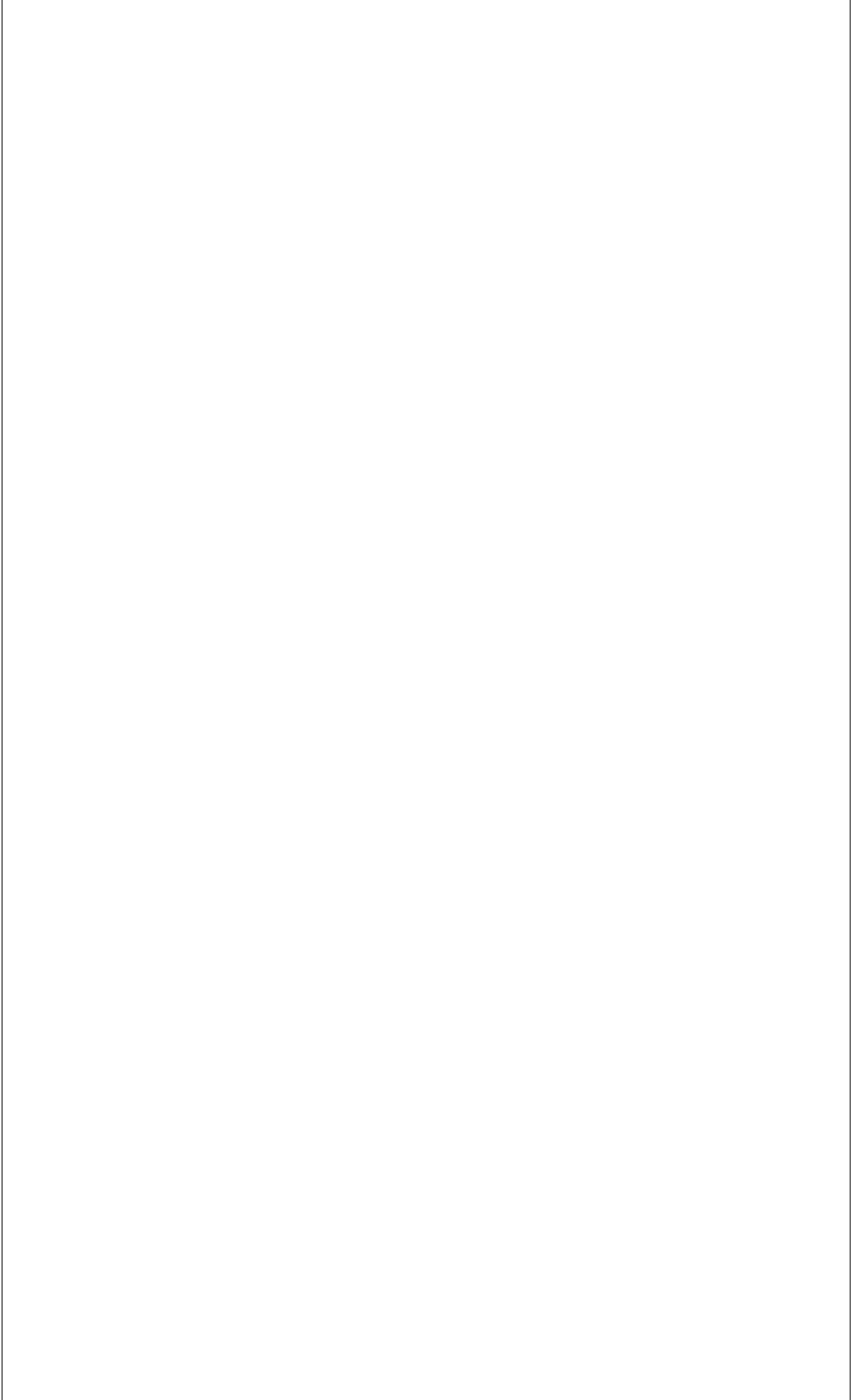
EARSC Industry Survey 2024

Section 1: Company information

* 1. What is the name of the company?

[   ]

* 2. In which country is your company legally registered? (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 shared

○ Wholly or majority owned by another EO company

○ Wholly or majority owned by another industrial company

○ Wholly or majority owned by an investment company

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

Section 2: About your company

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

Total employees	
Total EO related employees	

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

- ◯ Significant decrease
- ◯ Slight decrease
- ◯ No change
- ◯ Slight increase
- ◯ Significant increase

Section 3: Financial information

* 6. For the legal entity listed in Q1, what was your total revenue for 2023 or the last full financial year (**in KEuro**)? A 10% approximation is adequate for our purposes.

[   ]

* 7. Is the revenue indicated in Q6 completely coming from sales of "EO-related" data, products, and services? If not, what percentage is directly related to EO products and services?

[   ]

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

2023 total data costs (€K) [   ]

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

○ Significant decrease   ○ Slight increase

○ Slight decrease   ○ Significant increase

○ No change

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

○ Yes (included)

○ Yes (not included)

○ No

If yes, please indicate the name and contact information of the subsidiary:

[   ]

11. In the past 12 months, has your company obtained (direct or indirect) funding to provide EO products or related services to any of the following International Finance Institutions (IFIs) listed below?

☐ World Bank   ☐ Inter-American Development Bank

☐ Asian Development Bank   ☐ No funding from IFIs

☐ International Fund for Agricultural Development
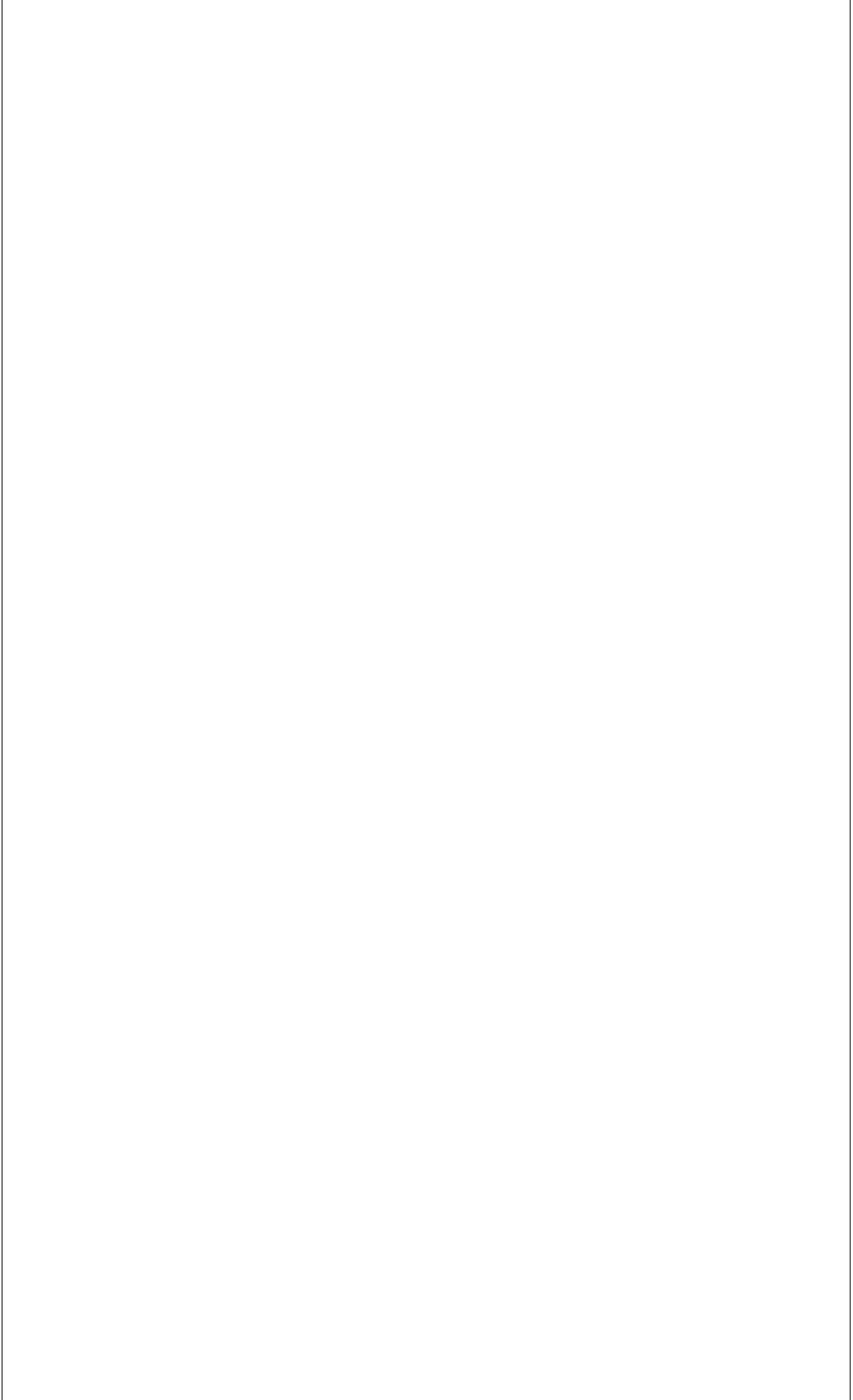
Section 4: Market

* 12. In which geographic areas are you doing business? Roughly what percentage of your revenues (as reported in response to Q7) come from the following areas/regions?

Domestic (your home country)	
Rest of Europe	
North America	
South America	
Middle East	
Asia	
Russia/ CIS	
Oceania	
Africa	

* 13. In which geographic areas do you foresee business opportunities?

14. For data and value added services, what percentage of your business (as reported in response to Q7) comes from online order entry?

Data	
Value-added services	

Section 5: Copernicus

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

☐ Sentinel-1: C-Band SAR   ☐ Sentinel-3: SRAL

☐ Sentinel-2: MSI   ☐ Sentinel-3: MWR

☐ Sentinel-3: SLSTR   ☐ Sentinel-5: TROPOMI

☐ Sentinel-3: OLCI   ☐ None of the above

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

○ Amazon Web Services   ○ As a partner in the Copernicus services

○ DIAS (Data and Information Access Services)   ○ Sentinel Hub

○ Copernicus Data Space Ecosystem   ○ Google Earth Engine

○ National hubs

○ Other (please specify)

[   ]

17. Given your response to Q16, could you tell us the reasons why you are using this platform?

☐ Costs

☐ Easy access

☐ User friendliness

☐ Unaware of alternatives

☐ Convenience

☐ Corresponds to my technical needs

☐ Other (please specify)

[   ]

18. 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 Dioxyde Monitoring)
- ☐ CRISTAL (Copernicus Polar Ice and Snow Topography Altimeter)
- ☐ LSTM (Copernicus Land Surface Temperature Monitoring)
- ☐ ROSE-L (L-Band SAR)
- ☐ no idea

19. If you are able, could you tell us which of the new Sentinel missions is most important and why?

20. Are you participating in the supply of Copernicus services? Which ones?

- ☐ Land (except global land and European ground motion service)
- ☐ Global land
- ☐ European ground motion service
- ☐ Emergency services (except rapid mapping)
- ☐ Marine
- ☐ Atmosphere
- ☐ Security
- ☐ Climate change
- ☐ Rapid mapping
- ☐ Not participating in the supply of Copernicus services

21. Are you using Copernicus services? Which ones?

- ☐ Land (except global land and European ground motion service)
- ☐ Global land
- ☐ European ground motion service
- ☐ Emergency services (except rapid mapping)
- ☐ Marine
- ☐ Atmosphere
- ☐ Security
- ☐ Climate change
- ☐ Rapid mapping
- ☐ Not using Copernicus services

* 22. What percentage of your revenue currently depends on direct contracts coming from Copernicus?

	0%	10%	20%	50%	75%	100%
Data	○	○	○	○	○	○
Services	○	○	○	○	○	○

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

	0%	10%	20%	50%	75%	100%
Data	○	○	○	○	○	○
Services	○	○	○	○	○	○

* 24. Please estimate the future impact of Copernicus on your business.

	significant decrease	slight decrease	no change	slight increase	significant increase
Expected impact	○	○	○	○	○

25. Please provide us with any comments or inputs you may have regarding the Copernicus programme.

Section 6: Skills

* 26. As employers, please indicate how difficult it is to fill open positions with qualified employees.

○ No problem at all

○ Slight difficulties

○ Significant difficulties

○ Impossible to fill open positions

○ Not applicable (we are not currently recruiting)

27. If you find it difficult to fill open positions, please indicate why.

☐ Individuals lack sufficient transversal skills including communication, organization, teamwork, critical thinking, etc.

☐ Individuals lack sufficient business skills

☐ Individuals lack knowledge and skills in new technologies (e.g. immersive visualisation, ML, and treating algorithms, etc.)

☐ Attracting applicants is difficult

☐ The number of candidates is too low

☐ Conditions by candidates are difficult to meet (e.g. only part-time working, salary)

☐ General ICT skills are weak

☐ Other (please specify)

[   ]

28. Which 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
- [ ] Understanding of markets and societal needs
- [ ] Other (please specify)

29. Do you anticipate hiring in the next months? What are your reasons for hiring?

- [ ] Increase in business sales
- [ ] Increase in project execution
- [ ] Change in work and/or business processes
- [ ] Reorganisation of the workforce
- [ ] Change and/or adaptation of our products or services
- [ ] Acquisition of new equipment
- [ ] Adoption of new technologies (AI, ML, edge computing, etc.)
- [ ] Need to understand the political arena
- [ ] Not planning on hiring in the coming months
- [ ] Other (please specify)

30. Which elements are you considering including within your workforce tasks in the next months?

☐ Relaunching existing products or services

☐ Organising or managing marketing initiatives

☐ Evaluating results

☐ Handling relations with technicians and specialists

☐ Handling dedicated sessions with customers

☐ Selecting and disseminating information on current affairs

☐ Organising events (i.e., events and fairs)

☐ Studying competitors

☐ Conducting market research

☐ Defining and implementing product promotion strategies

☐ Developing and launching new services or products

☐ Internationalisation (export management)

☐ Other (please specify)

Conclusions

31. Could you tell us what you think about EARSC's activities?

32. 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 Adress

Phone number

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

34. If you have one, what is your company's 2023 EO success story?

35. If you have one, what is your company's 2023 EO R&D success story?