

Earth Observation solutions for sustainable development: hands-on e-shape climate services



e-shape

EuroGEO Showcases:
Applications Powered
by Europe

www.e-shape.eu

7 June 2022

9:00 – 16:00 CET

ITU Suleyman Demirel Cultural Center

Istanbul

Francesca Piatto, EARSC

Latest trends and markets development for Earth Observation services

eurisy
ACTING COLLECTIVELY TO
BRIDGE SPACE AND SOCIETY

TUA
Turkish
Space Agency

What's EARSC

Trade (non-profit) association
founded in 1989,
dedicated to helping
European companies
in the
EO downstream sector

130+ members from
25 countries in Europe



@earsc



EARSC



European Industry at a glance

- 6th survey on the state & health of the EO services industry, prepared by EARSC with the support of ESA
- 2nd survey in new series of annual updates
- Direct research on over 600 companies; survey sample of 150 companies



713 Companies
up from
572 (+24%*)



11,600 Employees
up from
9800 (+17%*)



€1.71b Revenues
up from
€1.38b (24%*)



10% growth rate

>10% CAGR**
Sustained

* Year On year.

** CAGR over 5 years

What does the European industry look like?

- UK, Germany and France: largest number of EO service companies
- UK yet has fewer employees than both France and Germany
- Over 93% of the companies have less than 50 employees (i.e. small or micro-sized).

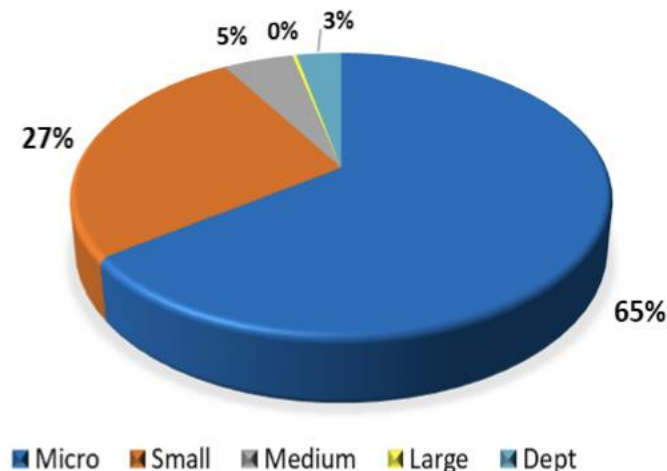
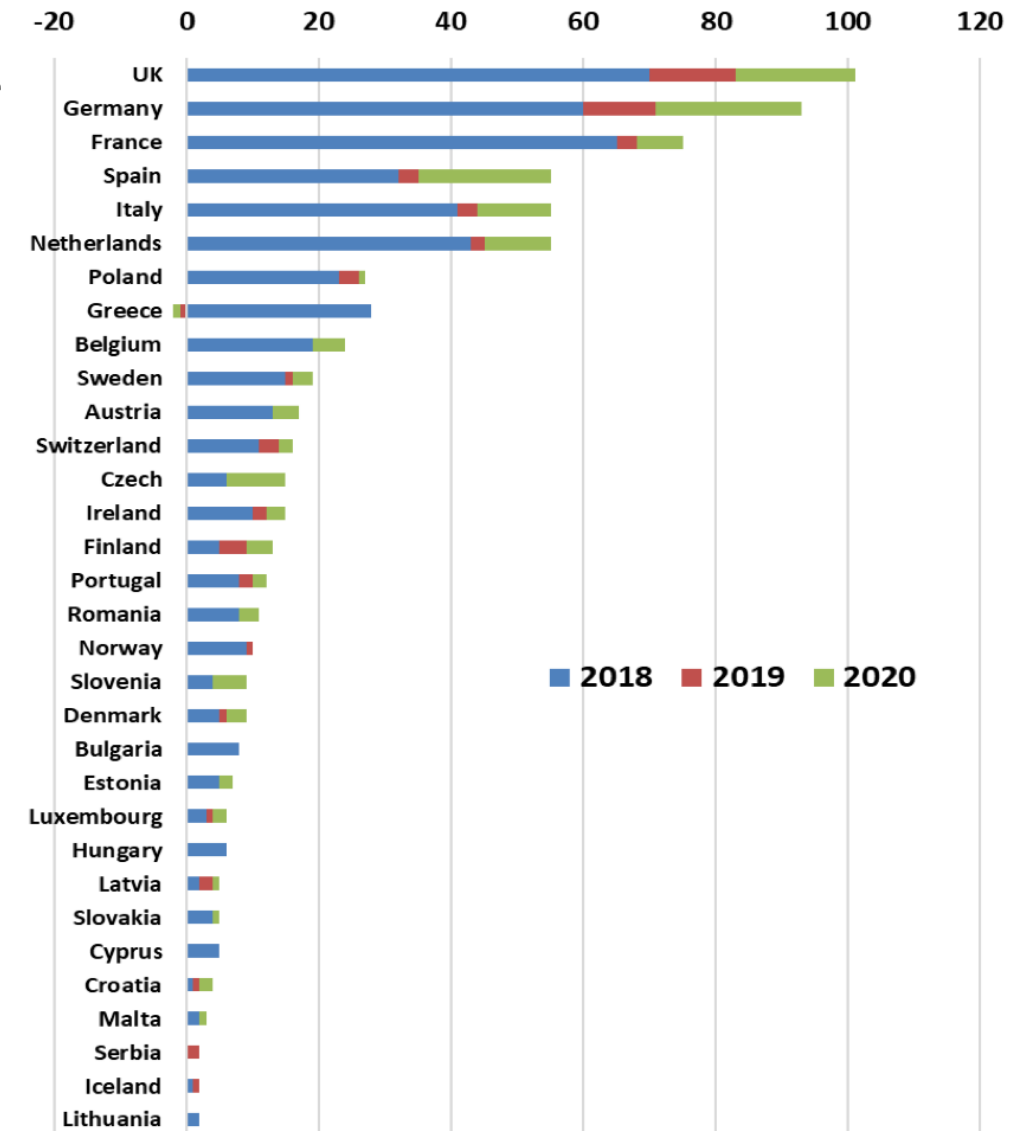


Figure 4. Breakdown of companies in 2020.



Employment in the EO Sector

Total number of employees in the sector is 11,600 in 2020.

Small companies (10-50 employees) have over 4100 jobs)

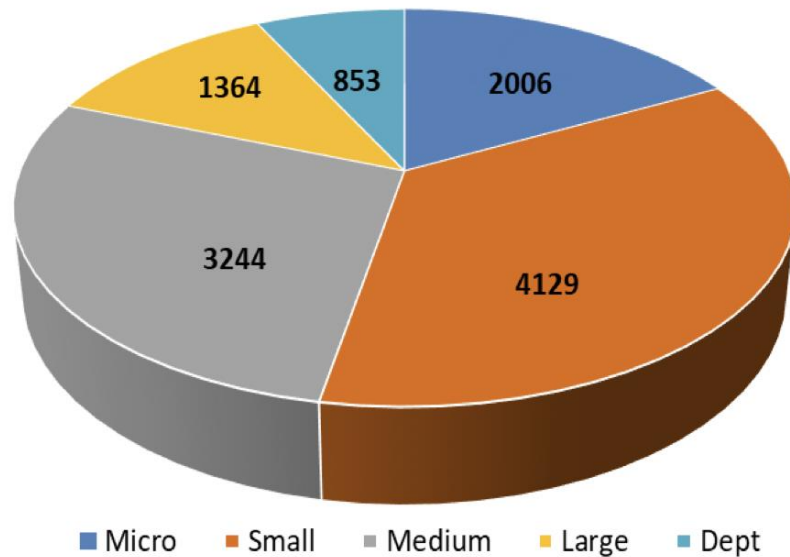


Figure 10. Breakdown of Employees per Company Class in 2020

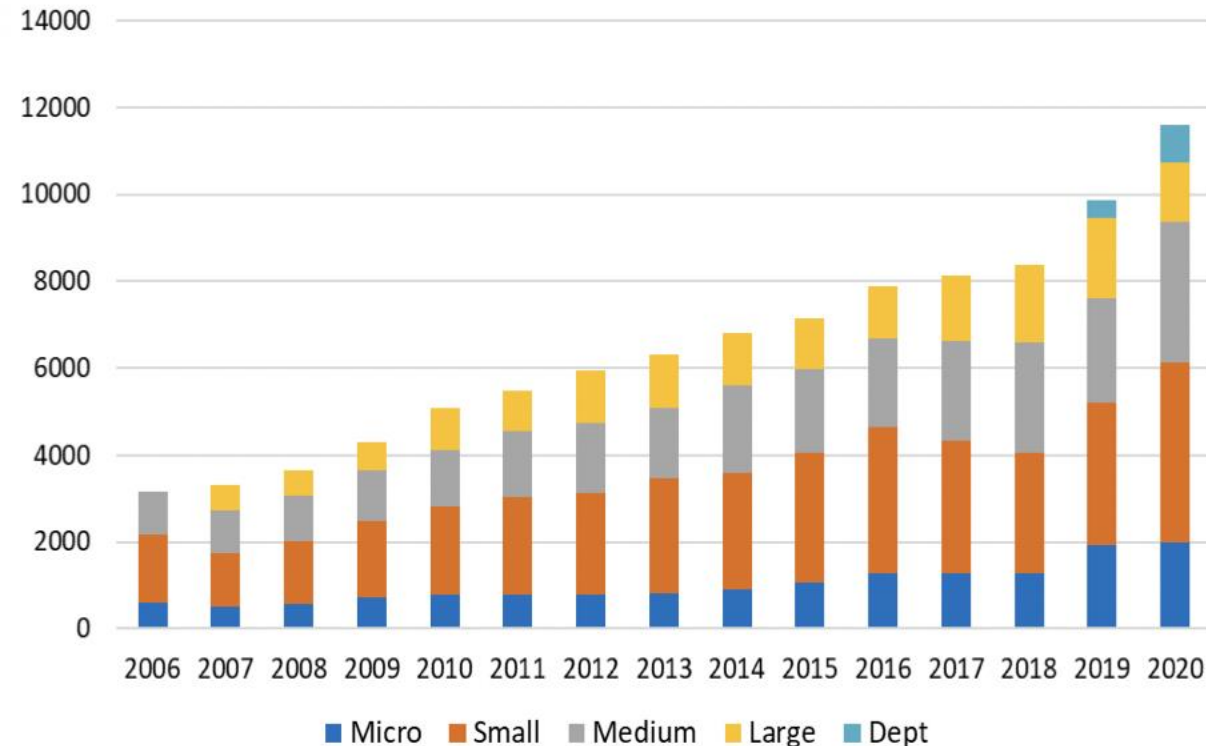
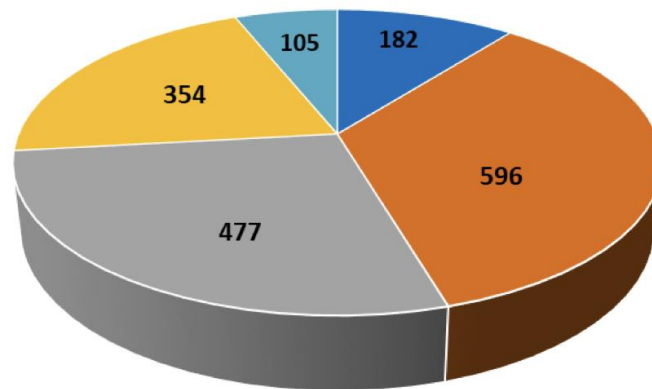


Figure 8. Evolution of EO Employees by company class

Revenues in the EO Sector

- Consistent and sustained growth of around 10%
- Total revenues for European EO services compar in 2020 around €1.71b
- Small companies (11 to 50 employees) generate over €500m in 2019



■ Micro ■ Small ■ Medium ■ Large ■ Dept

Figure 15. Breakdown of Revenues per Company Class (€m) for 2020

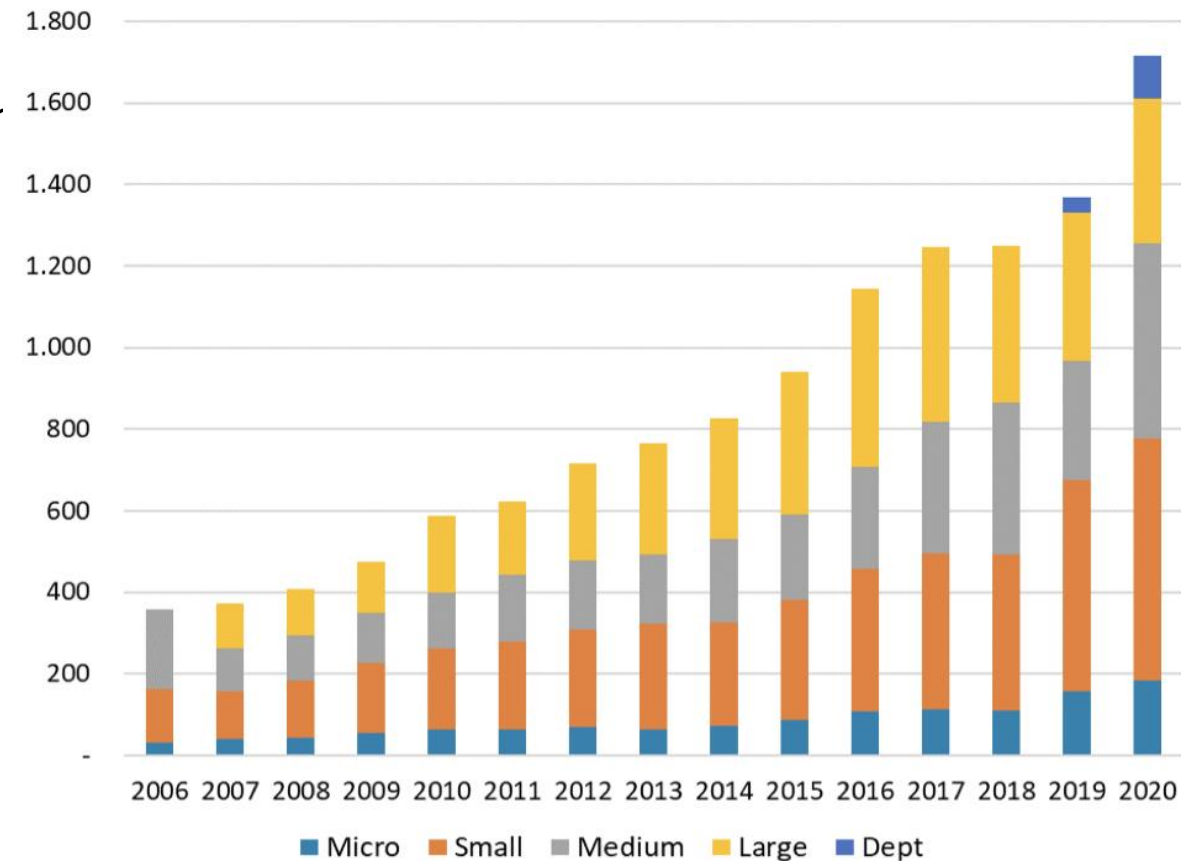


Figure 14. Evolution of Revenues per Company's Class

Employment-skills

- Difficulty to hire qualified staff
- Importance of skills
- $\frac{3}{4}$ of the companies reported difficulties to find and hire staff due:
 - lack of transversal and business-oriented skills,
 - competitive market place,
 - lack of trained staff in the EO sector in certain countries..

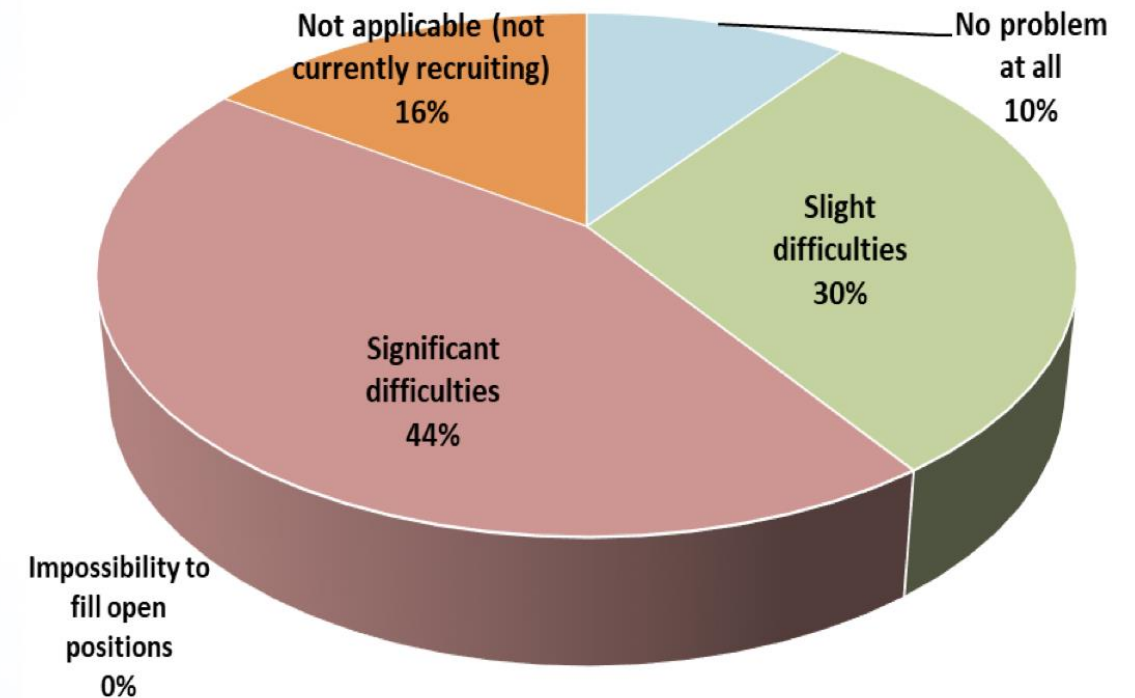
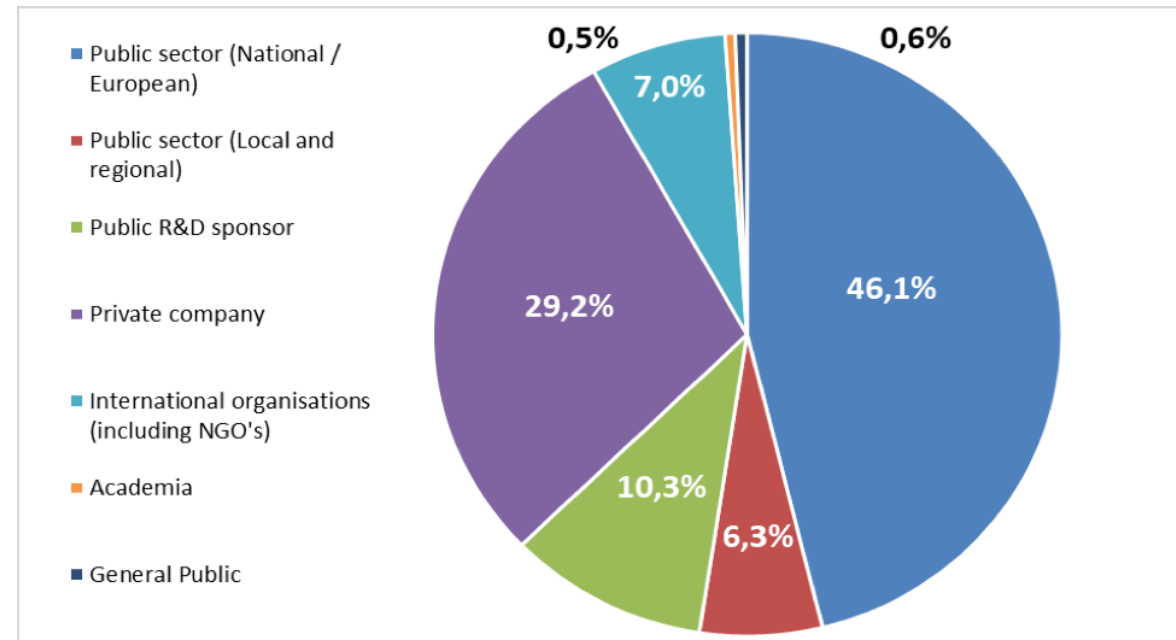
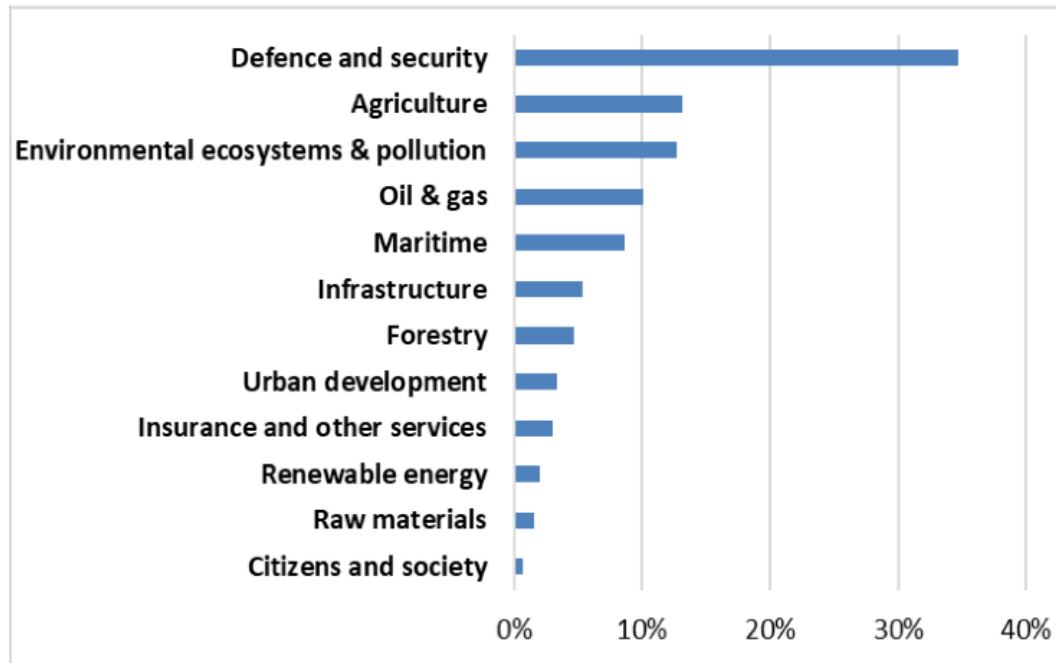


Figure 12- Estimation of how difficult it is to hire qualified employees

Types of markets and end-users

Note that in the previous surveys, the Emergency services was a separate market sector. It may now be included in Defence and security.

The direct business with the public sector represents 52,4% of the market and business with the private sector accounts for 29,2%.



Copernicus- Participation to the supply of Copernicus services

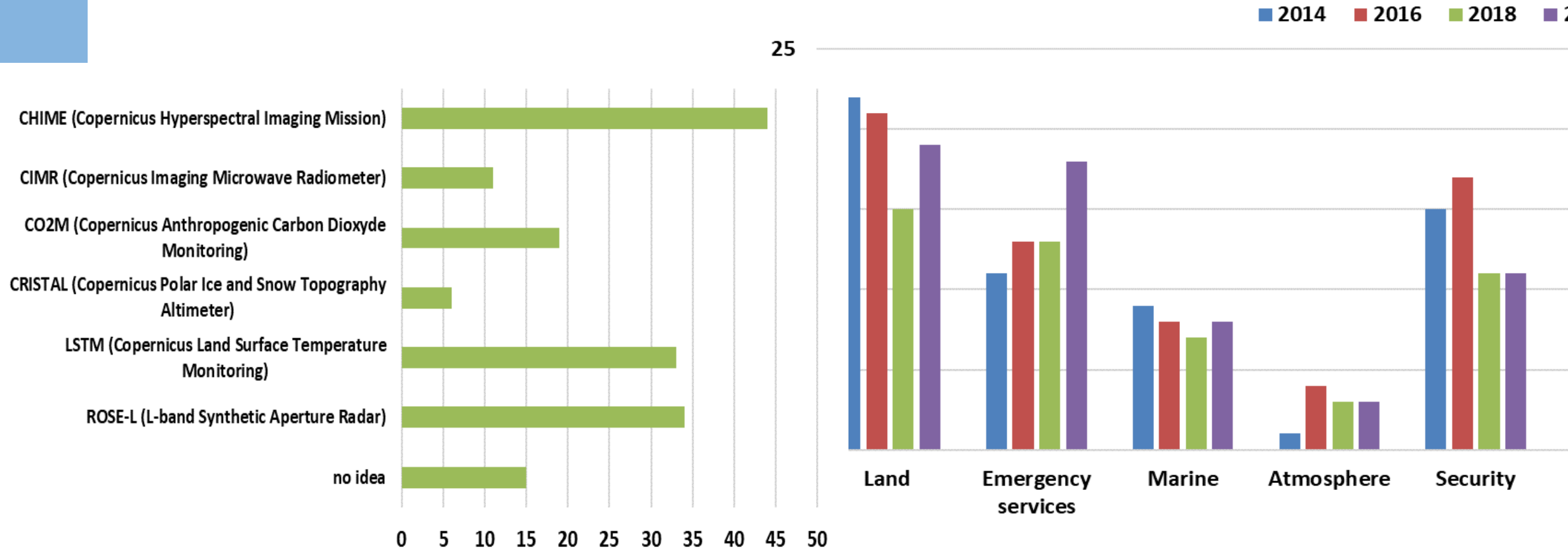
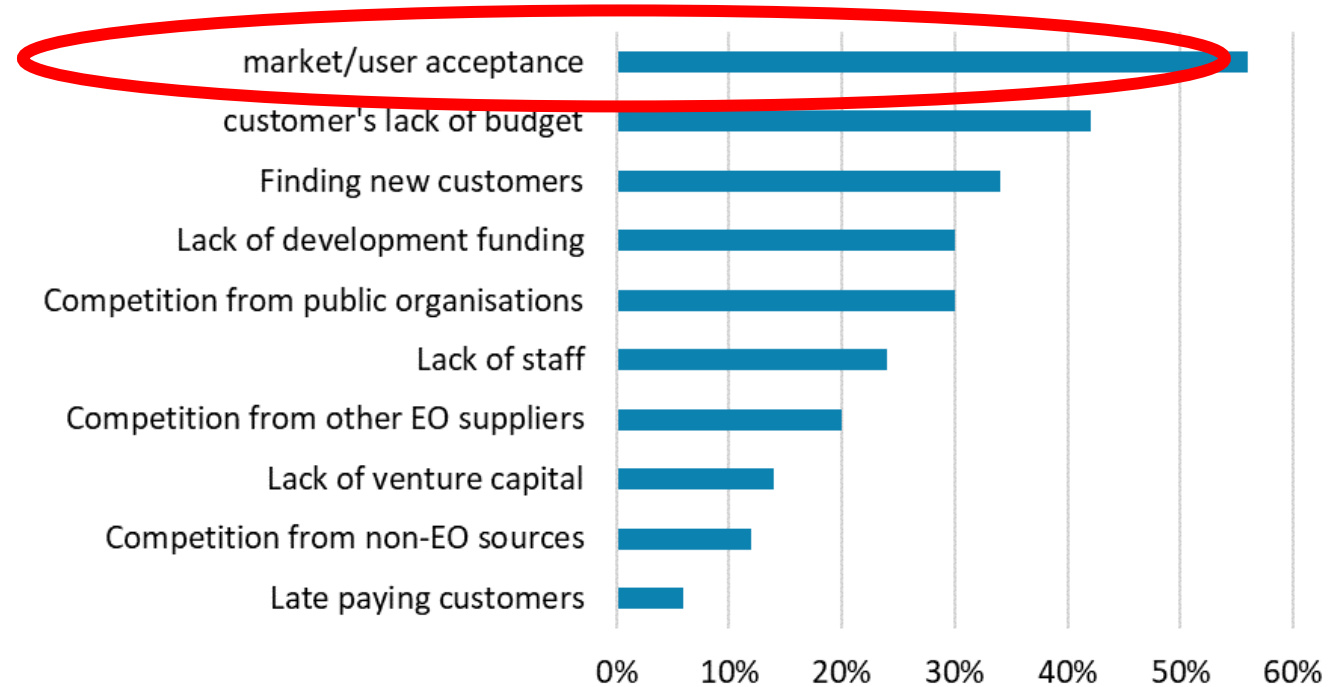


Figure 36. Participation to the supply of Copernicus services

Barriers perceived

- Market acceptance is still the main barrier
- Move to a one shot map to a monitoring service
- Standardization of indicators/parameters



About Sentinel Benefits studies

Measuring the impact of EO-based services using Sentinel data throughout the value chain regarding:

- Economic
- Environmental
- Social Benefits (jobs, businesses)
- Regulatory
- Scientific



Sentinel family – Source: ESA



Sentinel Benefits Studies (SEBS)



From Innovation to Operation



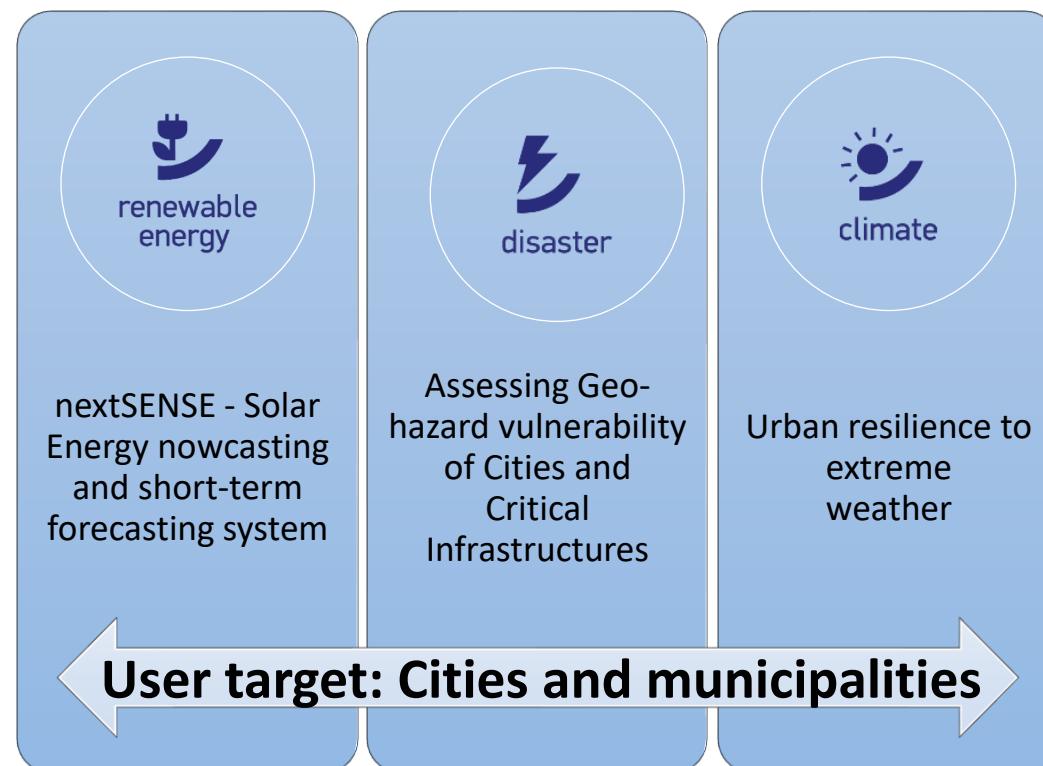
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FIRE

Ex of Focus Group:

- Urban
- Infrastructure
- Energy



Co-design approach

Thank you!



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