

EuroGEOsec – CS#7: Assessing research to market success through drivers and blockers

Abstract

EuroGEO¹, Europe’s branch of the Group on Earth Observations (GEO), sits at the intersection of research, policy, and markets. From this position, it remains at the forefront of Earth Observation (EO) in Europe and beyond, identifying trends, engaging with stakeholders, and mapping the current landscape. It also explores ways to increase the adoption of EO and the steps required to achieve this objective.

The two-year project *EuroGEOsec*, launched in December 2023, aims to establish the EuroGEO Secretariat to support the EuroGEO initiative. Work Package 3 (WP3) consists of tasks to maximise the impact of research and innovation (R&I), including through dedicated case studies (CS) that showcase potential **innovation and market development support** services that the EuroGEO Secretariat could offer. These CS examine stakeholder support needs in their efforts of **bringing R&I results to the market**.

To address these **needs**, five **Operational Pipelines** (OPs) have been defined, each representing a key link in the EO value chain where challenges may arise. CS#7 falls under the OP “From R&I to Market” – see Section 2.2 for further details.

This document dives into the work behind CS#7, detailing its **sources**, **methodology**, and **findings**. While the CS examines which business or economic factors might act as commercialisation drivers or barriers for EO R&I products, solutions, or services, it should be noted that these outcomes are potential, not guaranteed.

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¹ https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data/knowledge-centres-and-data-portals/eurogeo_en

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List of Abbreviations

Abbreviation	Description
AG	Action Group
API	Application Programming Interface
CS	Case Study
CS#7	Case Study number 7
EARSC	European Association of Remote Sensing Companies
ECMWF	European Centre for Medium-Range Weather Forecasts

EO	Earth Observation
ESA	European Space Agency
EuroGEO	Europe's branch of the Group on Earth Observations
EuroGEOSec	EuroGEO Secretariat project
EUSPA	European Union Agency for the Space Programme
GEO	Group on Earth Observations
IP	Intellectual Property
NOA	National Observatory of Athens
OP	Operational Pipeline
R&I	Research and Innovation
SaaS	Software as a Service
WP	Work Package

1. Purpose and scope

This Case Study (CS) aim to identify the key **enablers and barriers to commercialising** Earth Observation (EO) solutions developed through European **R&I programmes** (e.g. Horizon Europe, ESA, EUSPA, ECMWF, Mercator Ocean International) to support the EuroGEO community in strengthening commercial pathways for EO innovation.

In order to do so, a **survey** was designed and disseminated within the EuroGEO community (see section 3.1 for more information). The outcomes and insights from the survey aim to provide R&I projects concrete guidance on key factors that can influence their chances of achieving successful commercial solutions.

2. Contextual framework

2.1. EuroGEOSec and preceding initiatives

The **EuroGEOSec** project, aimed at establishing the EuroGEO Secretariat to support the EuroGEO initiative, addresses the innovation and market development challenges of the EuroGEO community – researchers, industry players (end-users and solution providers) and policy makers – through five **Operational Pipelines** (OP). Each pipeline targets specific needs and provides solution pathways across all stages, from policy development to market implementation. To this end, ten case studies (two per Pipeline) have been defined, based on needs identified in previous projects and stakeholder engagement, which illustrate the innovation lifecycle and testing services to be offered by the future EuroGEO Secretariat. Refer to the Annex for a more thorough overview.

Most notably, e-shape (2019-2023) played a key role in advancing initiatives that support the operationalisation of R&I products. It shifted the focus from a data-centric approach to a user-driven model, prioritising the long-term sustainability of products.

2.2. Operational Pipeline for Case Study#7 – From R&I to Market

This OP illustrates how while many activities, products and services are developed as part of innovation projects, they do not always reach a market-ready stage. This pipeline is designed for

the context of products or services **addressing research questions but being unable to reach the market.**

2.3. EuroGEOsec innovation support

The EuroGEO Secretariat aims to support entities developing EO-based products and services throughout all stages of the innovation process. This includes facilitating co-design through robust methodologies, hands-on support, and targeted research to ensure collaborative, market-oriented development. It also involves guiding practitioners through the complex data and infrastructure landscape by helping them identify suitable sources and offering tailored advice and resources to support informed decision-making. Finally, the Secretariat works to provide assistance with commercialisation, including market research, business and financial planning, investment readiness, and communication strategies.

2.4. EuroGEOsec market development support

The EuroGEO Secretariat aims to support market development for entities creating EO-based products and services. This would involve facilitating the integration of new users into EuroGEO using proven uptake approaches – aiming to develop joint action plans with key stakeholder communities that complement the existing Community of Practice and draw on market insights. To stay competitive and attract new user groups, EuroGEO aims to deliver training on market opportunities, marketing principles, Intellectual Property (IP) and licensing, as well as workshops on community building and uptake strategies – all geared towards improving sustainability and exploitation. It also will develop tailored communication to help the various audiences navigate the EO industry and policy landscape, supporting the Community's growth and consolidation.

3. Methodology

3.1. Survey design

The core part of this case study was the design and dissemination of a **qualitative online** survey. As a first step, the Evenflow and EARSC teams identified potential enablers and barriers to commercialisation based on the work carried out in other projects or initiatives that tackled this issue, such as e-shape² and EUSPA's Copernicus Demonstrators³.

As a result, the following **statement factors** were pinpointed as potentially relevant:

- Our project has a clearly **defined value proposition** for target users, i.e., reason why a customer would choose your solution over a competitors'
- Our project has a **well-defined business case**, i.e., addresses a gap in the market
- We have established strong **relationships *with (potential)* end-users *or customers (e.g., through *co-design*)*
- Our solution/project has a clear **business model** with defined **revenue *streams and *pricing *approach*
- Our solution is designed and provided in a **flexible and scalable *way (e.g., API, SaaS, subscription-based models)*

² <https://e-shape.eu/>

³ <https://www.euspa.europa.eu/eu-space-programme/copernicus/copernicus-demonstrators>

- We have obtained/are obtaining **additional funding** or investment to ensure **post-project sustainability**, e.g., public-private partnerships, government agencies, etc.
- We have conducted adequate **market analysis** and understand our competitive landscape
- We have a clear understanding of **external drivers of demand** for our solution (e.g., policy, economic, social, environmental, etc.)
- Our team has sufficient **commercial expertise** and understanding of business planning
- We have an established and **targeted marketing/communication strategy** to reach our end-users
- We had access to **tailored expert support** for business, legal, or investment readiness
- The solution is **NOT** **significantly constrained** by regulatory, legal, technical or IP access issues
- Other

Survey respondents were firstly asked to indicate a) whether their project and R&I solution had achieved commercial success and b) to indicate which of the above factors applied to their cases, for both successful and unsuccessful solutions (in reaching commercial success).

3.2. Survey dissemination

The survey was then shared with **consortium** partners for input, review, and testing before being opened up to external participants.

Once finalised, the survey was disseminated through the following channels:

- EuroGEOsec consortium partners were invited to share it with their **networks**.
- It was included in two **EARSC monthly reports** (April 25 and May 2025).
- It was included in a **dedicated email** to **EARSC members** regarding EuroGEO in early July 25.
- It was disseminated to the **Action Groups leaders** (and, in turn, members) through NOA in June 2025.

The above efforts resulted in very few responses, so alternative channels were added to the dissemination efforts:

- A **targeted** set of **emails** were sent out to organisations who took part in the **e-shape** project in July and August 2025 (outreach email and then a reminder).
- In collaboration with EuroGEOsec's communications team (NOA), the [survey was promoted](#) via the project's official **LinkedIn** channel in June 2025.

4. Survey results and analysis

4.1. Results

From the above dissemination efforts, the survey gathered 22 responses, 17 of which were usable; 6 reported that their solutions had successfully reached the market, while 11 indicated they were not commercially successful. It should be noted that the aim of our work was always to extract insights into successful commercialisation, regardless of whether they arose from commercially successful or unsuccessful solutions.

4.2. Analysis

Given the limited sample that the survey yielded, the results were analysed from several angles in order to extract as many indications of drivers and blockers as possible.

- A. **Numerical approach:** assessing which factors were more prevalent in successful and unsuccessful solutions.
- B. **“Inward” and “outward” factors approach:** which “inward-looking” (i.e., linked to the business itself, for example financial and human resources, etc.) and which “outward-looking” factors (i.e., linked to outside elements such as the market, economic environment, legal constraints, etc.) seemed to influence or not the successful or unsuccessful commercialisation.
- C. **Combining factors approach:** which combination of factors could be found in the successful solutions versus the unsuccessful ones.

Approach#1: Numerical analysis

Factor	Successful (n=6)	Unsuccessful (n=11)
Defined value proposition for target users	3	6
Well-defined business case	2	4
Relationship with end user	5	6
Clear business model with defined revenue streams	0	1
Solution flexible & scalable	4	4
Post project sustainability	3	1
Understanding competitive landscape	0	2
Understanding external drivers of demand	2	6
Commercial expertise	2	2
Targeted marketing/ communication strategy	0	0
Tailored expert support (legal, business, investment)	1	2
No regulatory, legal, technical or IP access issues constraints	1	3

Table 1: Approach#1 – Prevalence of each factor within the survey responses (in absolute terms)

Factor	Successful (%)	Unsuccessful (%)
Defined value proposition for target users	50	55
Well-defined business case	33	36
Relationship with end user	83	55
Clear business model with defined revenue streams	0	9
Solution flexible & scalable	67	36
Post project sustainability	50	9
Understanding competitive landscape	0	18
Understanding external drivers of demand	33	55
Commercial expertise	33	18
Targeted marketing/ communication strategy	0	0
Tailored expert support (legal, business, investment)	17	18

No regulatory, legal, technical or IP access issues constraints	17	27
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Table 2: Approach#1 – Proportional value of each factor (in relative terms)

Among the 6 **successful** solutions, the most prevalent factors were **strong end-user relationship** and **flexible and scalable** design. Factors of medium prevalence included a defined value proposition, post-project sustainability, a well-defined business case, awareness of external demand drivers, and commercial expertise. The least prevalent were tailored expert support on legal or business matters, and the absence of regulatory, legal, or technical constraints. In addition, three factors were not reflected at all in the survey answers: a clear business model, understanding of the competitive landscape, and a targeted marketing or communication strategy.

Alternatively, among the 11 **unsuccessful** solutions, the most prevalent factors were a **defined value proposition**, **strong end-user relationship**, and awareness of **external demand drivers**. Factors of medium prevalence included a well-defined business case, flexible and scalable design, the absence of regulatory, legal, or technical constraints, tailored expert support on legal or business matters, commercial expertise, and understanding of the competitive landscape. In turn, the least prevalent factors were a clear business model and post-project sustainability, with a targeted marketing or communication strategy factor not reflected at all.

From the above, only one factor seemed to clearly influence the successful commercialisation and that is **post-project sustainability**. 50% of successful respondents secured post-project funding, compared with only 9% of unsuccessful respondents; we can thus assume that post-project sustainability can be classified as a driver of commercialisation. In addition, whilst several unsuccessful solutions had established a relationship with the end user (54%), there was a significantly higher prevalence of this factor in the successful solutions (83%). We can therefore assume that this is also likely a driver of commercialisation. The same can also be said for the scalable and flexible nature of the solution, with 67% of successful solutions having it versus 36% of the unsuccessful ones. Having commercial expertise in the team could also potentially support the successful commercialisation of a solution with 33% of successful respondents having it against 18% of unsuccessful respondents.

Other factors do not seem to strongly influence successful commercialisation, with responses being largely consistent across the board. Furthermore, within this pool of respondents, having a targeted marketing or communication strategy appeared not to have any influence, as it was not reflected in any of their answers on either side.

Finally, commercially unsuccessful solution developers potentially overestimated the influence of understanding external demand drivers (55% for unsuccessful vs. 33% for successful), understanding the competitive landscape (18% for unsuccessful vs. 0% for successful), and having no regulatory, legal, technical or IP access issues constraints (27% of the unsuccessful vs. 17% of the successful) on the commercialisation of their solution.

Approach#2: Inward- and outward-looking factors

Aside from the numerical analysis, it is also interesting to see whether “inward-looking” or “outward-looking” factors have a bigger impact on the successful commercialisation.

Inward-looking factors are linked to the business itself, for example financial and human resources, whereas outward-looking factors are linked to outside elements such as the market, economic environment, legal constraints, etc.

In this case, the inward-looking factors are the following: defined value proposition for target users; well-defined business case; relationship with end user; clear business model with defined revenue streams; solution flexible & scalable; commercial expertise and targeted marketing/ communication strategy; and tailored expert support (legal, business, investment). Whereas the outward-looking factors are the following: no regulatory, legal, technical or IP access issues constraints; post project sustainability; understanding competitive landscape; understanding external drivers of demand.

Inward-looking factor	Successful (n=6)	Unsuccessful (n=11)
Defined value proposition for target users	3	6
Well-defined business case	2	4
Relationship with end user	5	6
Clear business model with defined revenue streams	0	1
Solution flexible & scalable	4	4
Commercial expertise	2	2
Targeted marketing/ communication strategy	0	0
Tailored expert support (legal, business, investment)	1	2
Post project sustainability	3	1
Understanding competitive landscape	0	2
Understanding external drivers of demand	2	6
No regulatory, legal, technical or IP access issues constraints	1	3

● Inward-looking factor ● Outward-looking factor

Table 3: Approach#2 – Inward- and outward-looking factors (in absolute terms)

Factor	Successful (%)	Unsuccessful (%)
Defined value proposition for target users	50	54,54545455
Well-defined business case	33	36,36363636
Relationship with end user	83	54,54545455
Clear business model with defined revenue streams	0	9,090909091
Solution flexible & scalable	67	36,36363636
Commercial expertise	33	18,18181818
Targeted marketing/ communication strategy	0	0
Tailored expert support (legal, business, investment)	16,6666667	18,18181818
No regulatory, legal, technical or IP access issues constraints	16,6666667	27,27272727
Post project sustainability	50	9,090909091
Understanding competitive landscape	0	18,18181818
Understanding external drivers of demand	33	54,54545455

● Inward-looking factor ● Outward-looking factor

Table 4: Approach#2 – Inward- and outward-looking factors (in relative terms)

Overall, reviewing inward- and outward-looking factors shows no clear causal relationship with success or failure. However, when each factor is examined individually, some patterns emerge. Focusing on Table 4, we observe conclusive relationships between certain **outward-looking (external) factors** and

whether developed solutions reach the market successfully. In particular, considering post-project sustainability from the outset appears to support the transformation of R&I into marketable assets. Conversely, conducting early market analysis to understand the competitive landscape shows no correlation with commercial success and is instead associated with commercial failure.

Other factors, both **inward- and outward-looking**, present more ambiguous evidence. For example, establishing strong relationships with end-users and/or customers is linked to improved product outcomes, but also shows significant evidence of acting as an impediment. Similarly, factors such as having defined revenue streams, solution flexibility, commercial expertise, and understanding external demand drivers display inconclusive correlations.

Based on the information available in this case study, **outward-looking factors tend to have a greater impact** on successfully bringing R&I products to market.

Approach#3: Combining factors

In addition to the numerical analysis, it is interesting to understand if there is a specific combination of factors that drive successful commercialisation. Based on the most recurring factors within the successful factors we can see that the following combination of factors is more prevalent:

- a) Relationship with end user + scalable solution: 4 out of the 6 successful solutions had a combination of these two factors.
- b) Relationship with end user + scalable solution + post project sustainability: Within the previously mentioned four (a), two had a combination of these three factors.
- c) Relationship with end user + scalable solution + commercial expertise: Within the previously mentioned four (a), the two others had a combination of these three factors.

In comparison, among the unsuccessful solutions, only 1 of the 11 showed a combination of factors a); none showed a combination of factors b) and c); and 1 out of 11 had a combination – strong end-user relationship, commercial expertise, and post project sustainability – though without a scalable solution.

From the above, we can therefore infer that combining a strong relationship with the end user and a scalable solution is key to success. When these factors co-exist with either post-project sustainability or commercial expertise, a positive impact on successful commercialisation is also likely.

4.3. Conclusion

In conclusion, across the board it appears that the following **factors seem to drive the successful commercialisation of R&I solutions**: relationship with end user, scalable and flexible nature of the solution, post-project sustainability and commercial expertise. When combined, the impact of these individual factors seems to also positively impact the successful commercialisation.

On the other hand, the following factors **did not seem to have any specific influence** on the successful commercialisation of the R&I solutions: having a defined value proposition for target users, a well-defined business case, tailored expert support (legal, business, investment), an understanding of external drivers of demand, an understanding of the competitive landscape, no regulatory/legal/technical or IP access issues constraints, a clear business model with defined revenue streams and a targeted marketing/ communication strategy.

5. Challenges faced

Case study scope

The focus was initially on the IP requirements of EO solutions entering the market. However, after preliminary analysis and discussions with internal experts, it was decided to redefine and expand the factors to be considered in our analysis. The initial scope was too narrow and would have yielded less useful insights, given it would have only taken into account one of the (finally considered) twelve.

Analysed sample

The analysis is based on a rather small sample and is therefore limited in its conclusions. This is due to a lack of participation from the community in answering the survey. Despite disseminating it to all EARSC members (140+ contacts), to all AG chairs (14 contacts) and members (70+ contacts⁴) and within the consortium, the survey did not garner many answers. Therefore, a more targeted outreach approach was taken, which allowed to gather more input in order to be able to carry out an indicative analysis.

In order to confirm the above analysis and provide more relevant indications for the EuroGEO community, as bigger sample would be needed.

6. Annex

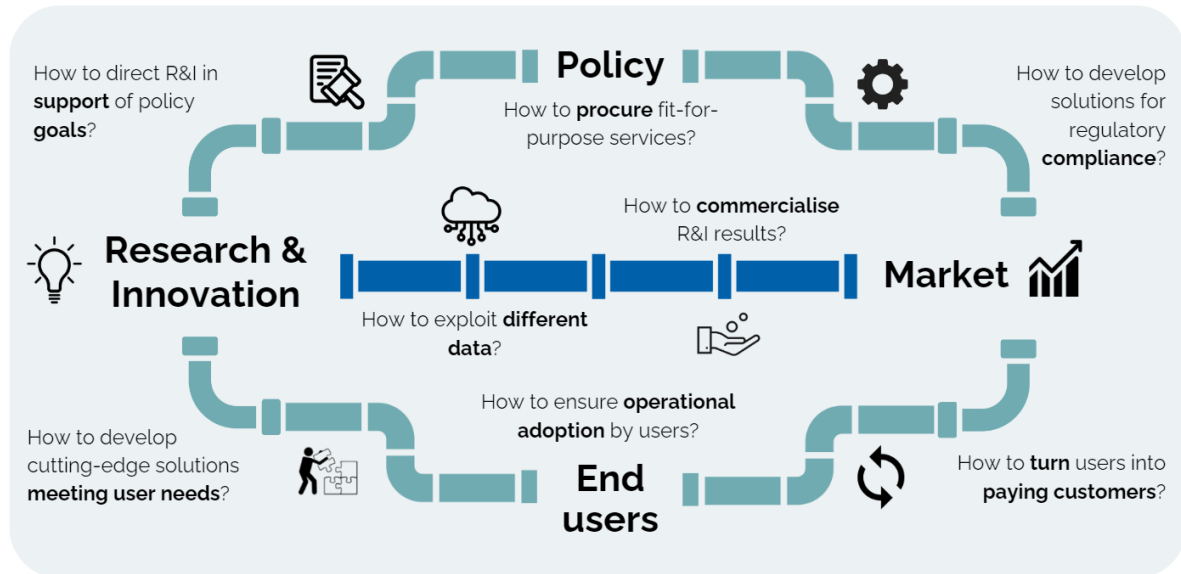
Operational Pipelines

Operational Pipeline	Description
Policy to market	The landscape of solutions to new regulations is very fragmented and many users lack clarity on how to access or use them. For example, the EUDR requires deforestation-free products supported by EO solutions, but provides limited guidance to users.
Infrastructure coordination	Common European Data Spaces can leverage EO data (satellite and in-situ), but implementation remains fragmented and user engagement is limited . Incorporating EO components into GDSS can help bridge this gap.
R&I supporting user needs	This pipeline addresses inquiries and challenges arising from users' specific needs or issues. For instance, the renewable energy sector must significantly increase output and can be supported by EO, but technical and awareness challenges remain.
From R&I to market	A situation where the product or service addresses research questions but is unable to reach the market . Namely, many activities have supported the use of EO for biodiversity monitoring, yet few have reached a market-ready stage.
Funding and finance	The EU funding landscape for collaborative projects is highly diverse and needs to be integrated and communicated effectively to optimise financial support for companies. This includes blending funding sources for service development.

Table 5: EuroGEOsec Operational Pipelines Description

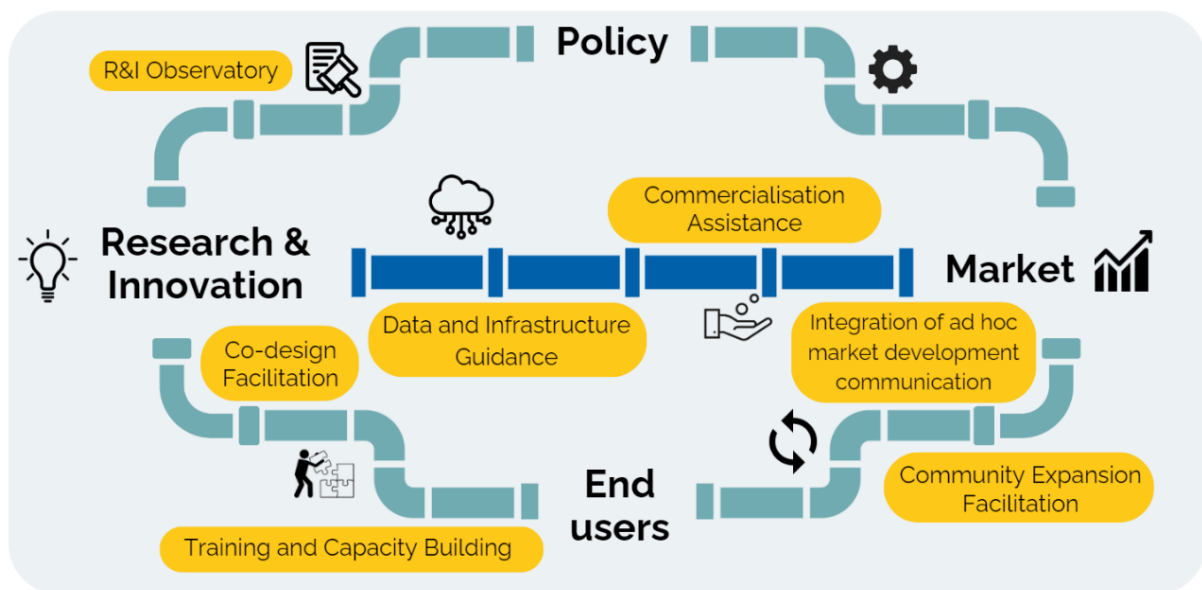
⁴ The estimate of 70+ is based on official online sources indicating the number of organisations and/or project members across the following Action Groups: Climate (c. 21 organisations), GDSS (10 projects), Disaster Resilience & Health (c. 9 organisations and 10 projects), LU/LI (6 organisations), and Urban (c. 14 organisations).

EuroGEOsec support



Developed by sevenflow for EuroGEO

Figure 1: Operational Pipelines Visual Representation, Highlighting Common Stakeholder Issues



Developed by sevenflow for EuroGEO

Figure 2: Innovation and Market Development Support to be provided by the Secretariat of EuroGEO