



ESRIN, Frascati,
28/03/2007



*To foster the development of a
European EO-service Industry
to operate on global market*

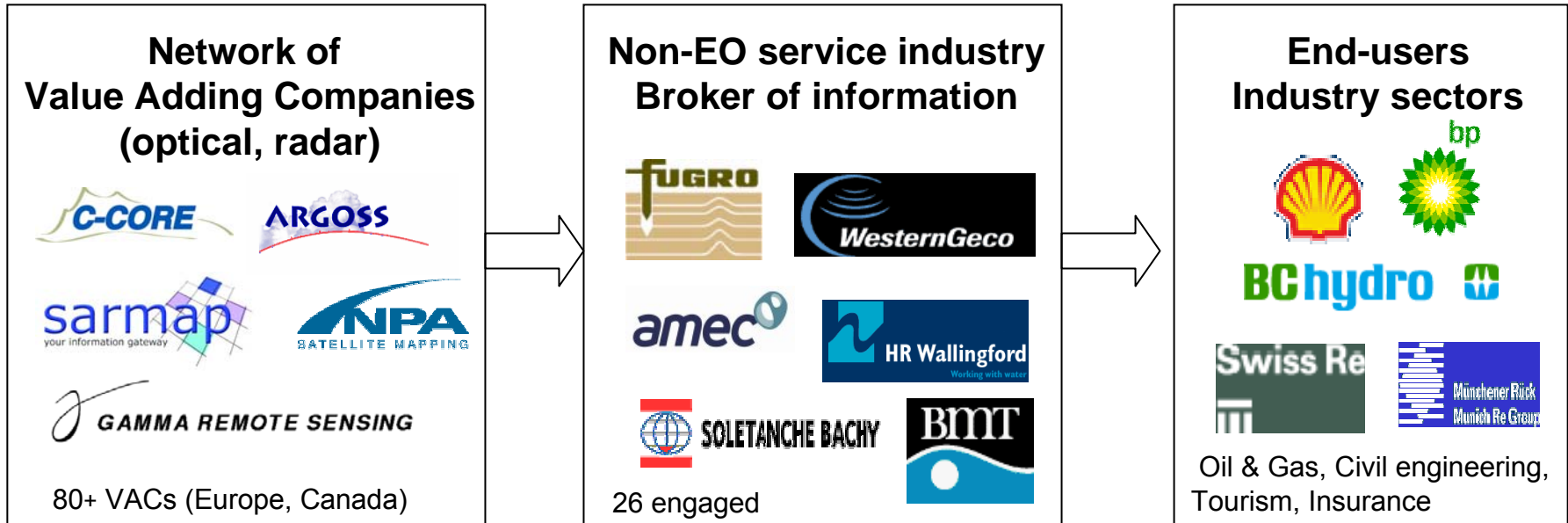
www.esa.int/eomd



SineQuaNet : (Space Intelligence Engineering & Quality Network)



Turning raw EO data into information services



Integrate EO services into operational business practises. (20 service contracts)

- Build trans-European partnerships between user and provider of EO technology.
- Support training, communication, capacity building.
- Test service on real test cases and assess performances (utility report).
- Quantify cost and benefits.

Perform Market & Industry Intelligence. (11 Market Driver contracts + survey)



SineQuaNet : (Space Intelligence Engineering & Quality Network)



Type	Mechanism	Size	# Contracts	Total Value
Exploratory	2000 Open Call	100 KŪ	22	2.0 MŪ
	2001 ITT	100 KŪ	6	0.7 MŪ
Services	2000 ERS	750 KŪ	4	2.2 MŪ
	2001 Envisat	750 KŪ	7	2.5 MŪ
	2003 Multi-EO	750 KŪ	9	6.8 MŪ
Industry	2002 Survey	750 KŪ	1	0.75 MŪ
Markets	2002 Drivers	200 KŪ	5	1.0 MŪ
	2003 Drivers	200 KŪ	7	1.4 MŪ
Innovative	2005 Batch 1&2	100 KŪ	13	1.3 MŪ
Corporate Sustainability	2006 CSD	250 KŪ	7	1.75 MŪ
Total				20,4

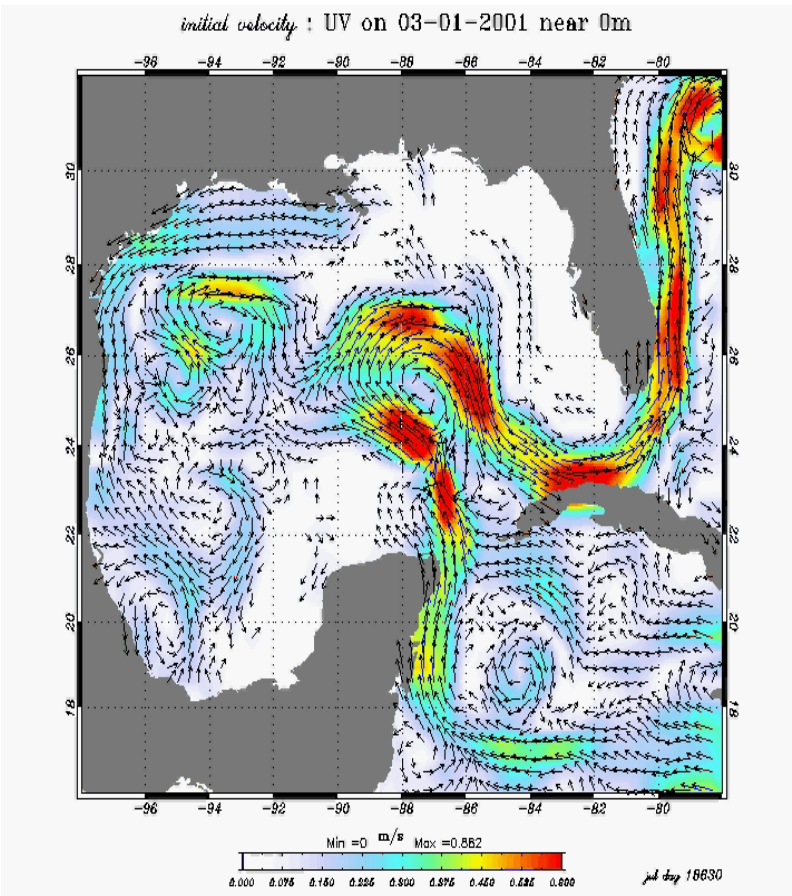
Main Achievements of EOMD

1. Engaged Industry (EO and Down-stream) to improve customer acceptance of EO information services,
2. Attracted Industry Investment, Generated new Business,
3. Established better understanding of the European EO service Industry & prospects for EO in emerging market sectors,

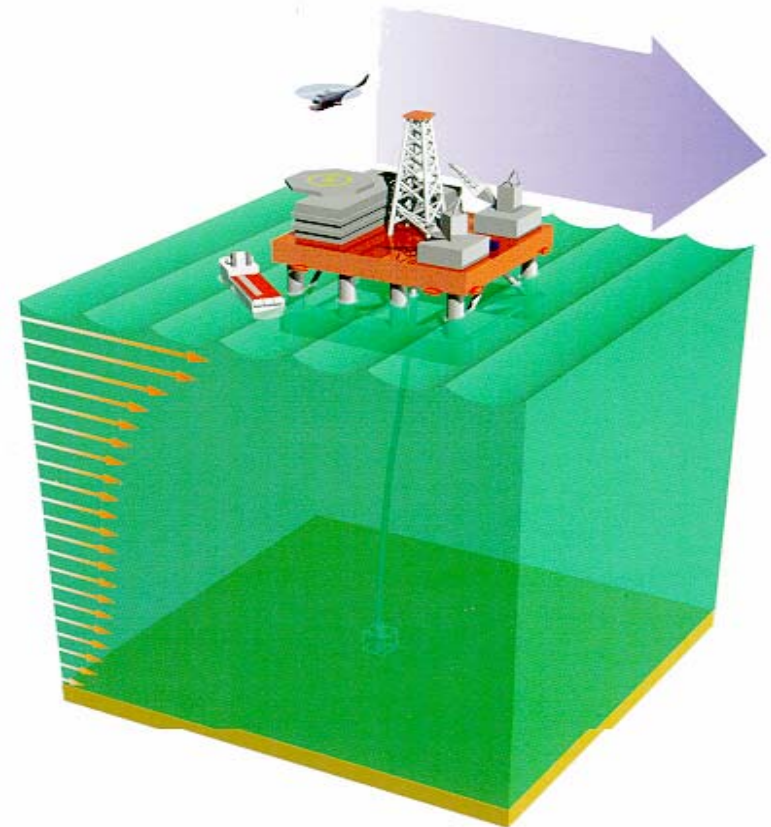
Main Programmatic Achievements

1. Engaged Industry (EO and Down-stream)
to improve customer acceptance of EO
information services

Ocean weather forecasting



Offshore oil exploration



Joint venture between ARGOSS (NI), NERSC (No), FUGRO GEOS (Uk) to create a company

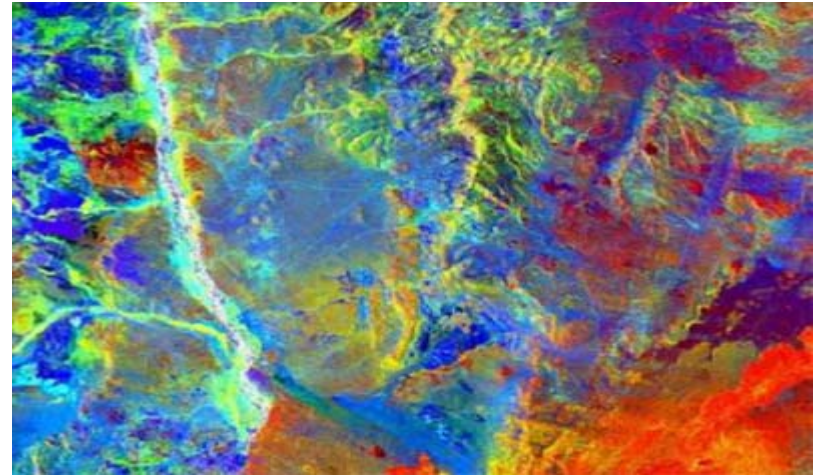
oceannumerics.com



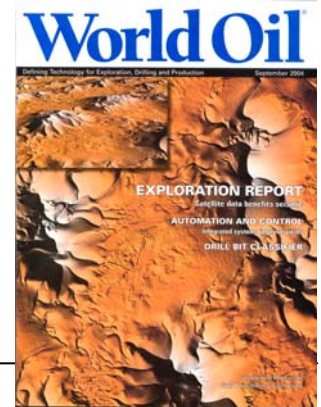
Explore in remote areas



EO for optimal planning of seismic surveys



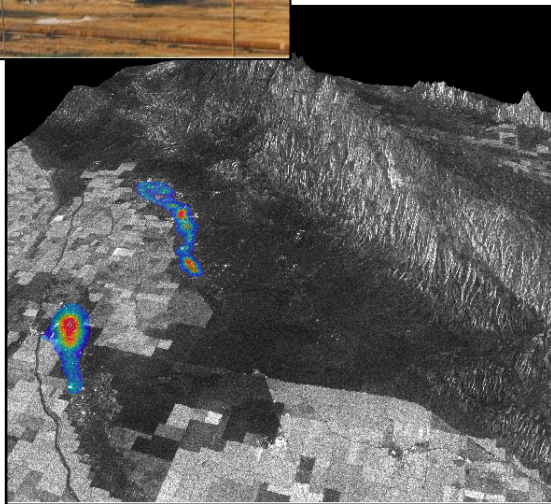
Promotion in major internal journals



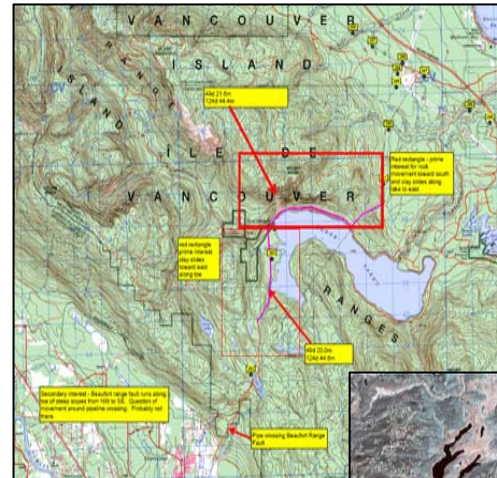
Oil field & Mining



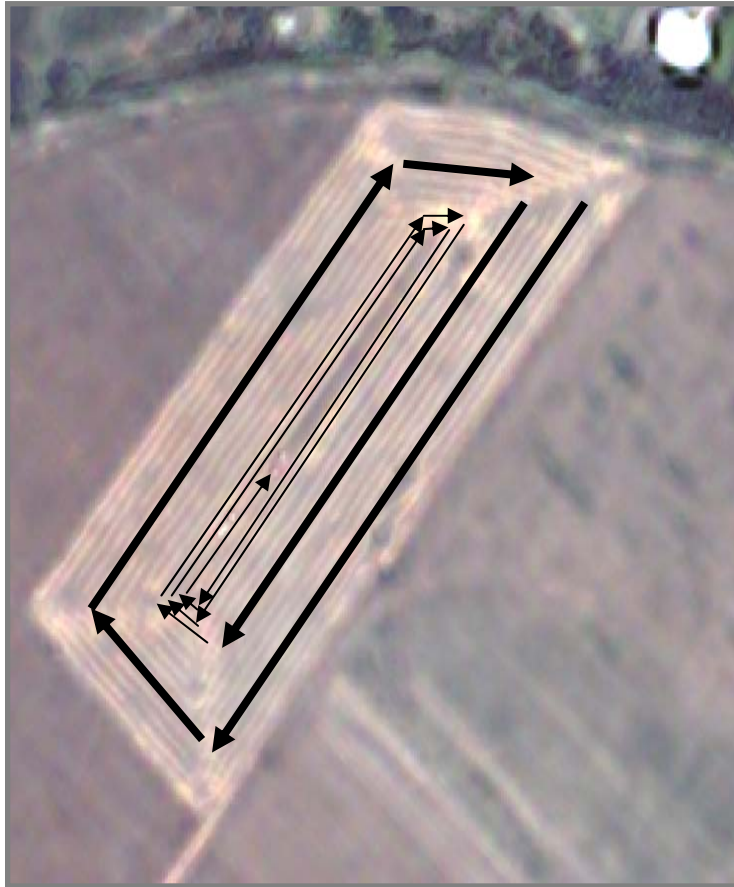
AREA now uses InSAR in place of GPS



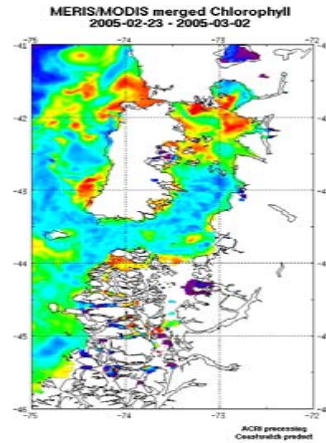
Pipeline corridor



Agriculture control



Aquaculture facilities

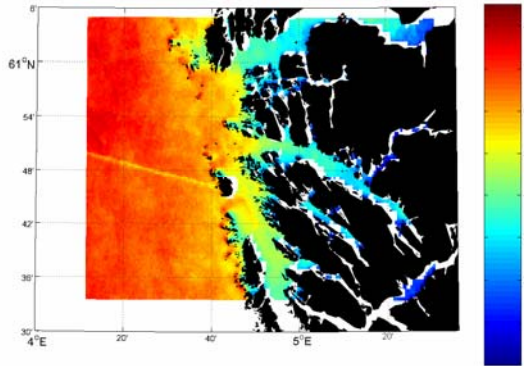


EUROSENSE (Be)

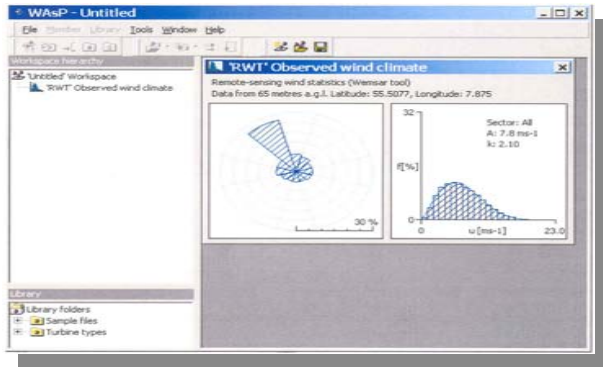
ACRI (Fr), Hatfield (Ca), Main Stream (Chile)



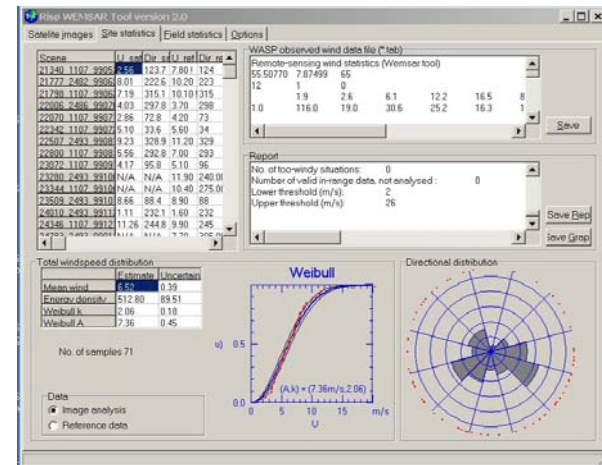
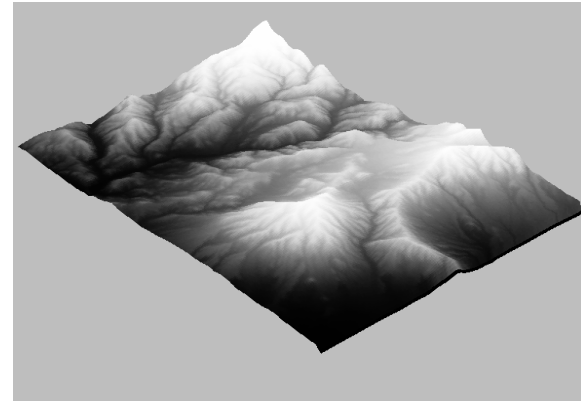
Offshore Wind Services



Integration into industry standards WASP



On-shore Wind services



NERSC (No), ARGOSS (NI), RISOE (Dk) and AIRTRICITY (Ie)

ARMINES (Fr), RISOE (Dk) and VESTAS (Dk)

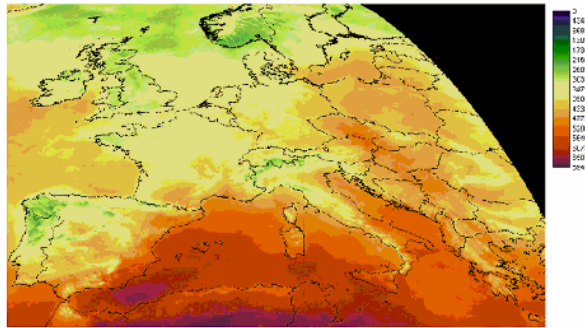
*Contribution to
GEOSS meeting in China*



EOWIND stand at the European Wind Energy Conference in London, essential meeting point for the Wind energy industry

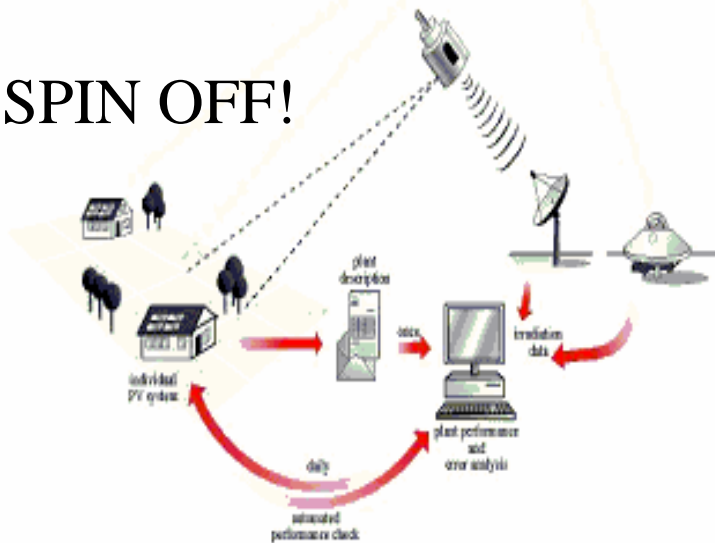


Managing PV plants



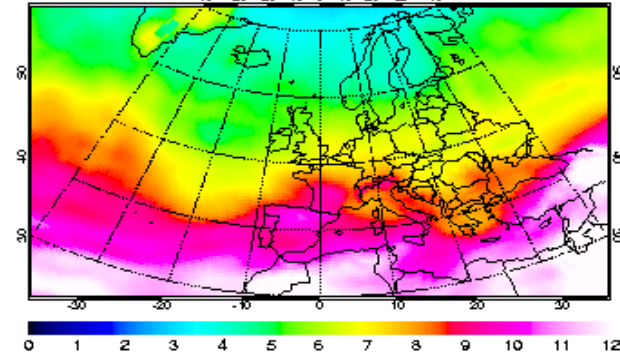
Ground irradiance

SPIN OFF!



DLR (De), Uni Oldenburg (De),
Tecsol (De)

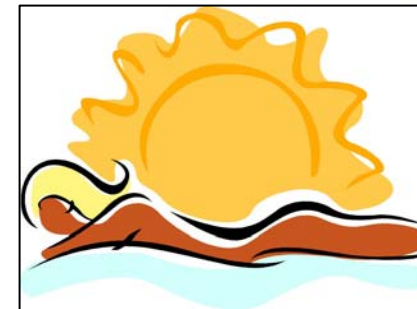
Happy Sun Mobile



UV index



Early
Warning



Happy Sun mobile service,
FLYBY (It), VODAFONE (It)

Main Programmatic Achievements

2. Attracted Industrial Investment, Generated New Business



Business Revenue from ESA contract



ESA, ESA, ESA
20/02/2007

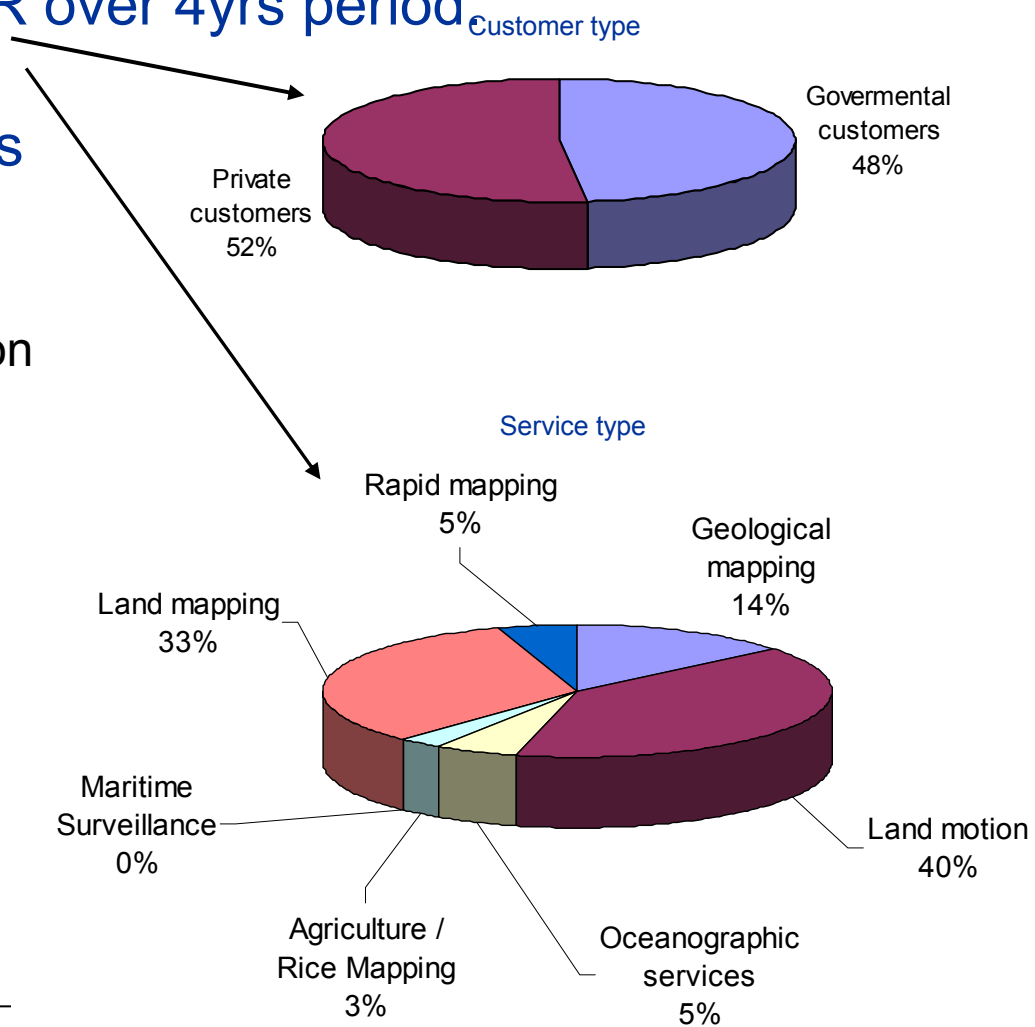


- Commercial revenues from 11 services actions contracts reported to be 2.8MEUR over 4yrs period

- 3 MoU, 5 Joint Ventures

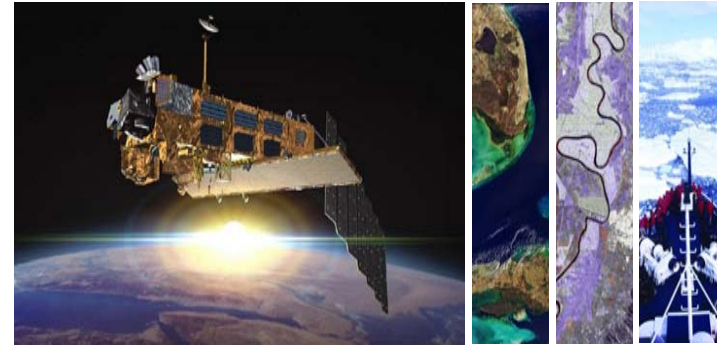
After ESA contracts

- Continuation service provision
- New contract opportunities (e.g TRE 7 Image One in Japan) in new fields or new regions
- Commercial Sales (e.g. Western Geco to BHP)



3. Established better understanding of the European Service Industry & prospects for EO in emerging market sectors

- **348** pages Charts, Facts, Figures of how the industry sees itself from **75** EO service companies
- Estimated Total revenues : **285 M€**
Actual reported revenues : **140 M€**
(**78 %** sales, **22 %** development)
(sales : **70 %** public, **30 %** private)
(public sector sales up **36 %** 2001-02)
- Growth rate **19 %** 2000 – 2002,
77 % of growth in 6 companies
- **152** products from **75** companies,
127 Land products, **70%** revenue share
25 Ocean products, **30%** revenue share
- Margins increased **3 – 10%** in 2000-2002

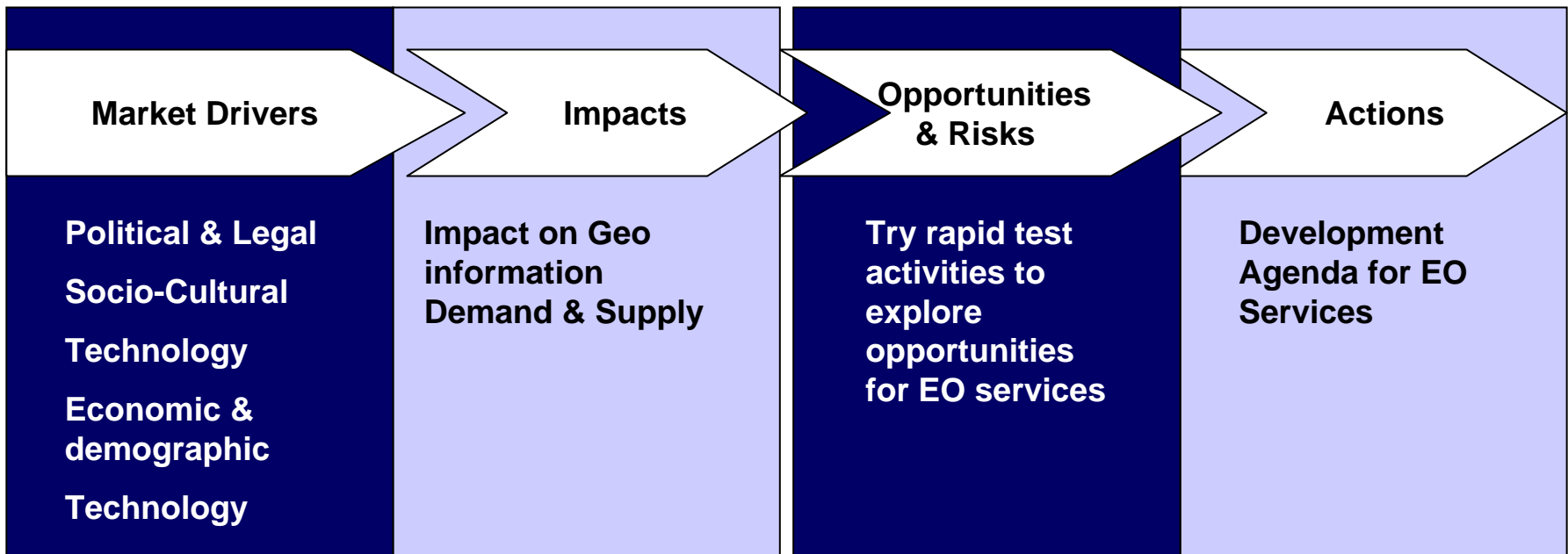


The State and Health of the European and Canadian EO Service Industry

Executive Summary

August 2004

- 12 emerging market sectors under study :-
 Forest, Coastal management, Urban & Mining Subsidence, Tailings Dams & Mine Waste, Pipelines, Geo-Marketing, Off-Shore Wind, Insurance, Tourism, Harbour Authorities, Location-based services, Fisheries.
- 34 test actions (small contracts < 10K) e.g. wind farm availability



- Built understanding, participation and momentum with Industry, starting from scratch in 5 years,
- Delivered achievements in-line with the original program objectives (ESA missions, Down-stream Industry)
- Supported EO Service Industry to better address new market opportunities
- Provided solid basis for a future program of work to further strengthen and develop the functioning, credibility and acceptance of the EO Services Industrial sector in EOEP-3.