

SIGNIFICANCE, REPRESENTATION AND FUTURE OF THE EUROPEAN EO VALUE-ADDING INDUSTRY

EO STAKEHOLDERS WORKSHOP, FRASCATI, September 14, 2006

-- FINAL PROGRAMME--

09h00

Welcome

Paul Kamoun, Chairman EARSC

Opening address

Dr. Stephen Briggs, Head of the Earth Observation Applications Department, ESA

09h15 – 10h45 Session 1: The Value Adding Services Industry: Significance and New Trends

09H15 – 09H30 Summary of the eoVox Position Paper: Paul Kamoun, EARSC

09h30 – 10h00 Keynote Speaker: Peter Williams, Microsoft Virtual Earth, Director Europe

10h00 – 10h45 Round Table with representatives of Users, Service Providers & Organisations

Timothy Conley, AMEC Earth & Environmental

Christopher Shaw, SHELL Oil

Rupert Haydn, GAF

Nigel Press, NPA

Christian Hoffman, Geoville

Antoine Monsaingeon, CLS

With views and feedback from the audience

Moderator: Desmond Power, C-CORE / Secretary: Birgitte Holt Andersen, ControlWare

10h45 – 11h15 Coffee Break

11h15 – 12h30 Session 2: EO Industry Expectations from its Trade Association

eoVox initial analysis and findings for open review with audience: Birgitte Holt Andersen, ControlWare

Scope of representation: Jorgen Hartnor, METRIA

New benefits from a European Trade Association: Matthew Stuttard, LogicaCMG

With views and feedback from the audience

Moderator: Gill Joy, ESYS / Secretary: Chetan Pradhan, LogicaCMG

12h30 – 13h45 Session 3: European EO Industry Position

Three splinter working groups to update the EO Vox Position Paper:

1. GMES and GEO: is it going to help or hinder the EO service industry?

Moderator: N. Veck, Infoterra Ltd. / Secretary: C. Pradhan, LogicaCMG

2. Making the most of R & D and new technologies

Moderator: M. Maranesi, Telespazio S.p.a. / Secretary: J. Forsgren, Metria

3. Can EO industry work together to expand the downstream commercial market?

Moderator: P. Lionnet, Eurospace / Secretary: G. Joy, Esys

13h45 – 14h45 Lunch Break

14h45 – 15h15 Report Session 3

Short plenary session with presentations of the key points from each splinter group

15h15 – 15h45 Coffee Break

15h45– 17h00 Session 4: EO Industry Development & Road Map for the Future

Paul Kamoun, EARSC

with views and feedback from the audience

Moderator: Pierre-Alain Schieb, OECD / Secretary: Matthew Stuttard, LogicaCMG

17h00 Meeting Close

Notes: Information on sessions at the back side of the agenda.

Prototypes for a customer oriented EO Industry Brochure and an EO Industry Directory will be available for review and feedback throughout the day

OBJECTIVES OF THE EO STAKEHOLDERS CONSULTATION WORKSHOP

The emergence of a variety of new services based on geo-information is creating a new paradigm for the development of the Earth Observation value-adding industry. The concurrent coming of age of high performance operational Earth observation space and airborne systems, in-situ monitoring, global positioning and geo-localisation, geographical information systems and telecommunications techniques is generating new approaches to meet customers needs and to industrial operations.

The one-day EOVOX stakeholder workshop will be structured around four sessions to progress toward reaching a consensus on a development plan for the European value-adding industry. In the first session a state-of-the art assessment of the significance and trends of this industry will be made with representatives of the user communities. In the second session a presentation of EOVOX analyses of the status and needs of the industry in terms of representation and trade association structure and tools will be made. These are aimed at the improvement of the overall efficiency of the European EO VA industry. Session three and four will be dedicated to the establishment of a common position paper (through three splinter meetings and a plenary in session three) and to the discussion of a roadmap for the overall development of the European VA industry in the next ten years.

Strong involvement of the participants is expected to reach the solid consensus required for the European EO VA industry to be a strong player and partner in European policy and strategy.

Session 1

- new paradigms in the user communities
- significance of the contributions of the EO VA industry
- new trends in service development
- synergies between new technologies
- standards
- Microsoft Virtual Earth, Google Earth and the like

Session 2

- eoVox initial analysis and findings for open review with audience
- Scope of representation
- New benefits from a European Trade Association

Session 3

Topic A): GMES and GEO: is it going to help or hinder the EO service industry?

- is GMES a closed shop?
- have the aerospace industry stitched everything ?
- are public partners competing (in-sourcing, outsourcing) ?
- is there any spin off commercial business ? when?
- who will get access to it ?

Topic B): Making the most of R&D and new technologies

- what are the latest developments identified by VACs that should help develop businesses? (observing new type of bio-geophysical information ? moving from monitoring to forecasting ? after Ocean and Land, atmospheric services ?)
- What needs to be developed and how can public sector (ESA, EC, others) help?
- How can knowledge transfer in Europe & Canada be effectively used to the benefit of VACs?
- How can VACs better access the variety of EO missions to come? How can multi-mission ground segment activities help industry?
- Are there new business models associated with web services? What is the "Google Earth Effect"? How can VACs exploit this?

Topic C): Can EO industry work together to expand the downstream commercial market?

- How can demand from industry customers be federated?
- What is the liability of VACs on the services they provide to industry customers? How is this impacting business development?
- Actions responding to common issues of industrial users: can this help VACs?
- what are the big industry issues that make a good starting point for EO VACs to develop the market ? Big actions to have big impact (as opposed to isolated actions with a few VACs and single industry player)
- examples:
 - Corporate Sustainable Development (industry common issue on a theme that is important to many big companies; address it via industry, industry associations WBSD in Geneva, via environmental auditors)
 - within industry sectors (say oil & gas) address industry groups looking at new technologies (e.g. WG with different industry players working together)
 - help EO become part of certification at the level of the standard authorities of certifiers (e.g. ships are sea-worthy: EO can help; not doing it with one certifiers but with all of them via their standard authorities)