



Qi3

E0 Services Markets

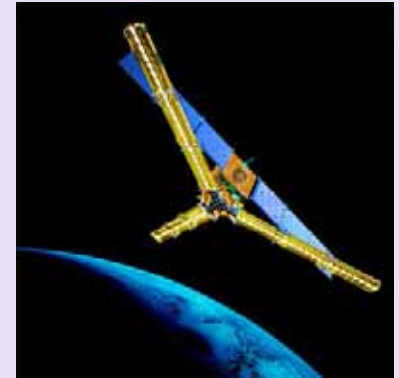
The Value Chain and the Chasm

Robin Higgons, Qi3

Qi3 - Quality, insight, integrity & innovation

■ Questions Addressed

- What is the commercial market for EO services
- Where is it developing
- How can CEOI contribute to its development



■ Sources

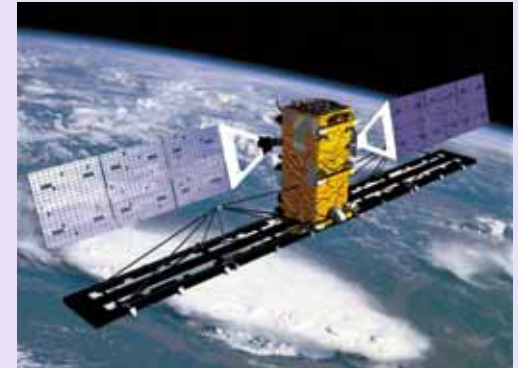
- CEOI – Market Assessment Study
 - *Commercialisation Requirements for Earth Observation (EO) Instrumentation Capability*
- Other Sources
 - ESA, NERC, Selex Communications, ESP KTN, BNSC

■ Existing Markets

- Environmental Sciences
- Oil & Gas
- Finance

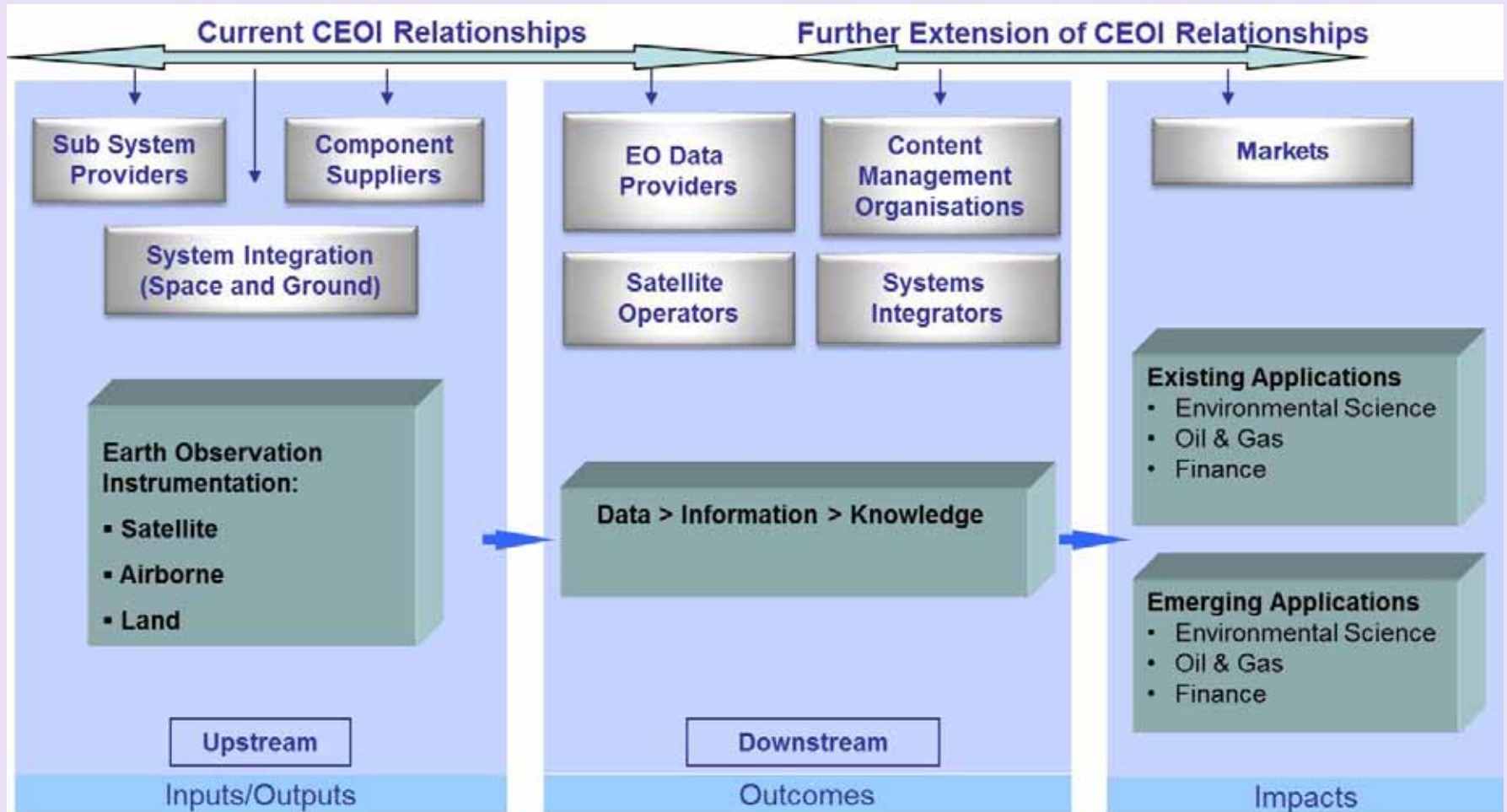
■ Emerging Markets

- Energy
- Transport & Safety
- Agriculture
- Security



- Radar Altimeters
- Scatterometers
- Lower Spatial Resolution Sensors
- Airborne Line Scanners
- Imaging Multi-spectral Radiometers
- Passive Microwave Radiometers and Spectrometers
- LiDAR
- Visible/near IR Multispectral and Hyperspectral Sensors
- High Resolution Optical Imagers
- Electro-Optical/Infrared Long Range Scanners
- Passive Remote Sensors

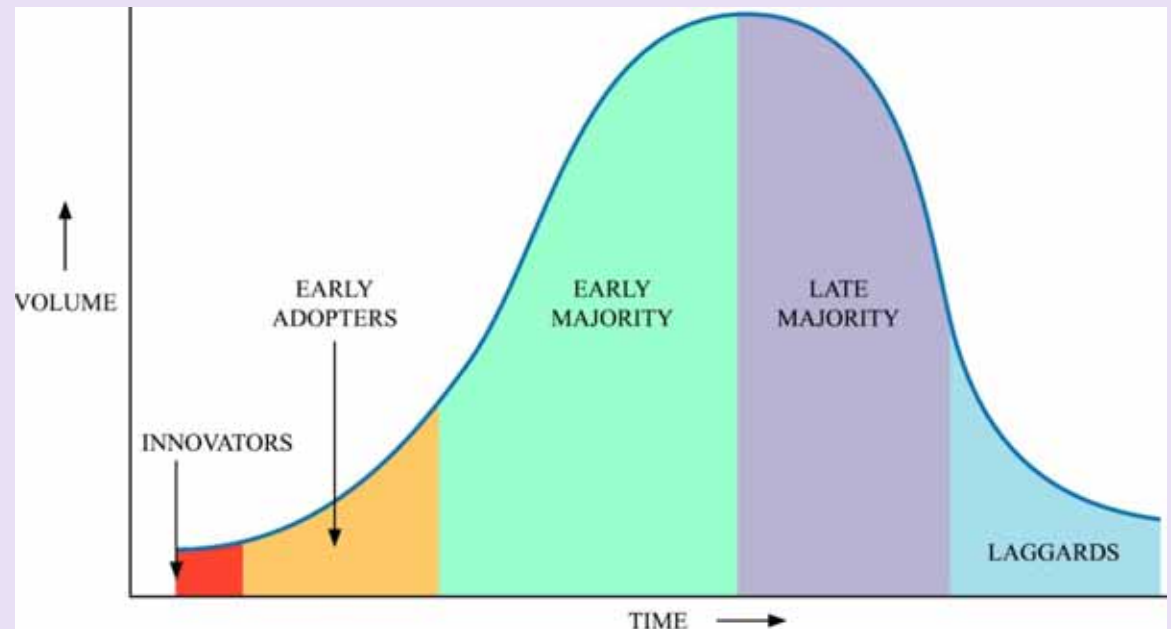




Source: Qi3

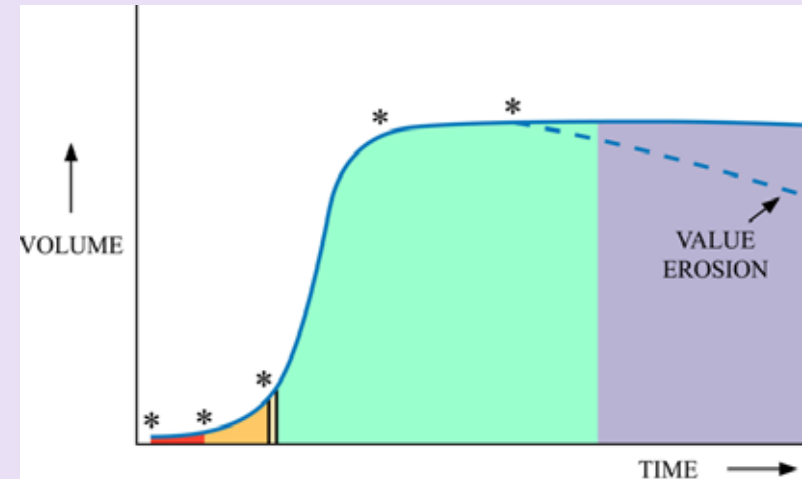
■ Key Findings

- Market still at early stage
- Participants are Innovators and Early Adopters
- Commercial projects are often organisation specific



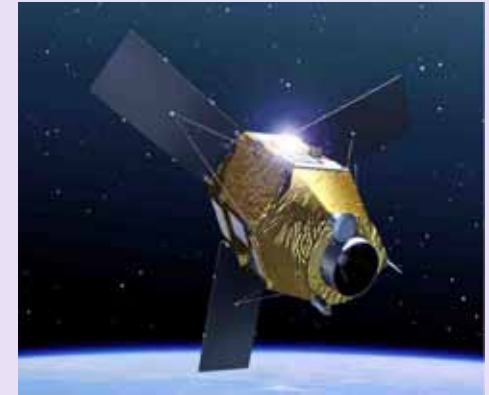
■ Key Findings

- Limited understanding of how developments across the value chain benefit end user challenges, e.g. Risk mitigation in Insurance?
- Lack of understanding throughout wider supply chain
 - Users
 - What can EO do for me
 - EO Systems Designers
 - What EO Information is needed for commercial applications
 - All
 - Who is in the Supply Chain



■ Conclusions

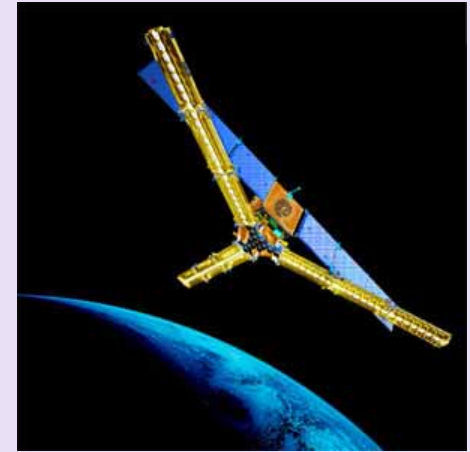
- Existing Markets are growing steadily
 - *Environmental Sciences*
 - *Oil & Gas*
 - *Finance*
- New Markets are emerging
 - *Energy*
 - *Transport & Safety*
 - *Agriculture*
 - *Security*
- Lack of widespread end-user understanding of EO Services and their benefits is restricting wide scale adoption
- The supply chain for commercial EO Services is broken (incomplete?) creating major barriers to market development



- CEOI KE programme focused on connecting the Supply Chain
- Key Tasks
 - Transmit Knowledge of EO capabilities DOWN the supply chain
 - Transmit Knowledge of user needs UP the supply chain
 - Create communities of common interest to develop understanding



- Sectors of focus
 - Transport
 - Road & Rail
 - Maritime
 - Air
 - Energy
 - Oil & Gas
 - Nuclear
 - Offshore Renewables



- Identify key stakeholders
- Engage with and gather feedback on specific needs in relation to EO technologies
- Arrange round-table consultation on issues of high and common interest
- Stimulate two-way dialogue between EO instrumentation designers and potential key users
- Plan Timescale – June 2011 to March 2012



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