

Target Export Country : CANADA

**GEO-ENERGY EUROPE**

Target Export Country : TURKEY

Target Export Country : MEXICO

**GEO-ENERGY EUROPE Webinar #1**

*May 21, 2019*

Target Export Country : KENYA

Target Export Country : INDONESIA

Target Export Country : CHILI



The GEO-ENERGY EUROPE project is funded by the European Union's COSME Programme (2014-2020)



# Webinar agenda & objectives

- Agenda:

1. Introduction to GEO-ENERGY EUROPE (GEE) project & metacluster - Emmanuelle Piron, POLE AVENIA (10')
2. GEO-ENERGY EUROPE forthcoming website – Emmanuelle Piron (10')
3. Key findings of WP3 main deliverable: a deep geothermal market and opportunity analysis of **Canada, Chile, Indonesia, Kenya, Mexico** – Stephen Walsh, Geoscience Ireland (20')
4. Next steps for the development of the internationalization strategy (WP4) & call for members inputs – Thomas Garabetian, EGEC (10')
5. Questions and Discussions – all (40 min)

- Objectives:

- Reach out to YOU (GEE cluster partners' members)
- Get you familiar with GEO-ENERGY EUROPE project & activities
- Get you involved through website, strategic planning & international missions

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KENYA

**GEO-ENERGY EUROPE**

**Part 1 - Introduction to GEO-ENERGY EUROPE project & metaccluster - *Emmanuelle Piron, POLE AVENIA***

**ESCP<sup>4</sup>i**  
GEO-ENERGY EUROPE  
Partnership



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# GEO-ENERGY EUROPE in short



- European project submitted under « CLUSTERS GO INTERNATIONAL » call, funded by EASME (Executive Agency for SMEs) / DG Growth / EU Commission
- Started in January 2018, for a duration of 2 years
- Budget 267 k€, 200 k€ EU grant (75% financing rate)
- Initiated & coordinated by POLE AVENIA, based in Pau, N. Aquitaine, SW France
- 8 partners from France, Belgium, Spain, Ireland, Hungary, Germany & Turkey
- Project objectives / EU expectations:
  1. To create a **European Strategic Cluster Partnership** or « metacluster » on geo-energy, promote experience & good practices sharing, technology & know-how transfers & give geo-energy sectors & geothermal energy more visibility in Europe and worldwide
  2. To develop a **joint internationalization strategy & roadmap** to help our member SMEs access, or increase their business on, the world deep geothermal markets



# GEO-ENERGY EUROPE's vision



To develop a stronger and more integrated European sustainable geo-energy sector, (especially SMEs) with an initial focus on geothermal energy

- Contribute to industrial deployment and market uptake of deep geothermal in Europe and across the world
- Export the European know-how and experience by helping the EU geo-energy SMEs increase their business and outside Europe

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# GEE partners & work program



8 partners from France, Belgium, Spain, Ireland, Hungary, Germany & Turkey, with a mix of cross-sectorial applied geoscience clusters and geothermal organizations, representing 23 countries

## Work Plan

**WP1: POLE AVENIA**  
Project Management  
& Dissemination

**WP2: GEOPLAT**  
Meta-cluster Capacity  
Building

**WP3: GEOSCIENCE  
IRELAND**  
Market & Opportunity  
Analysis

**WP4: EGEC**  
Strategic Planning &  
Implementation



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# Project progress



**GEO-ENERGY**  
EUROPE

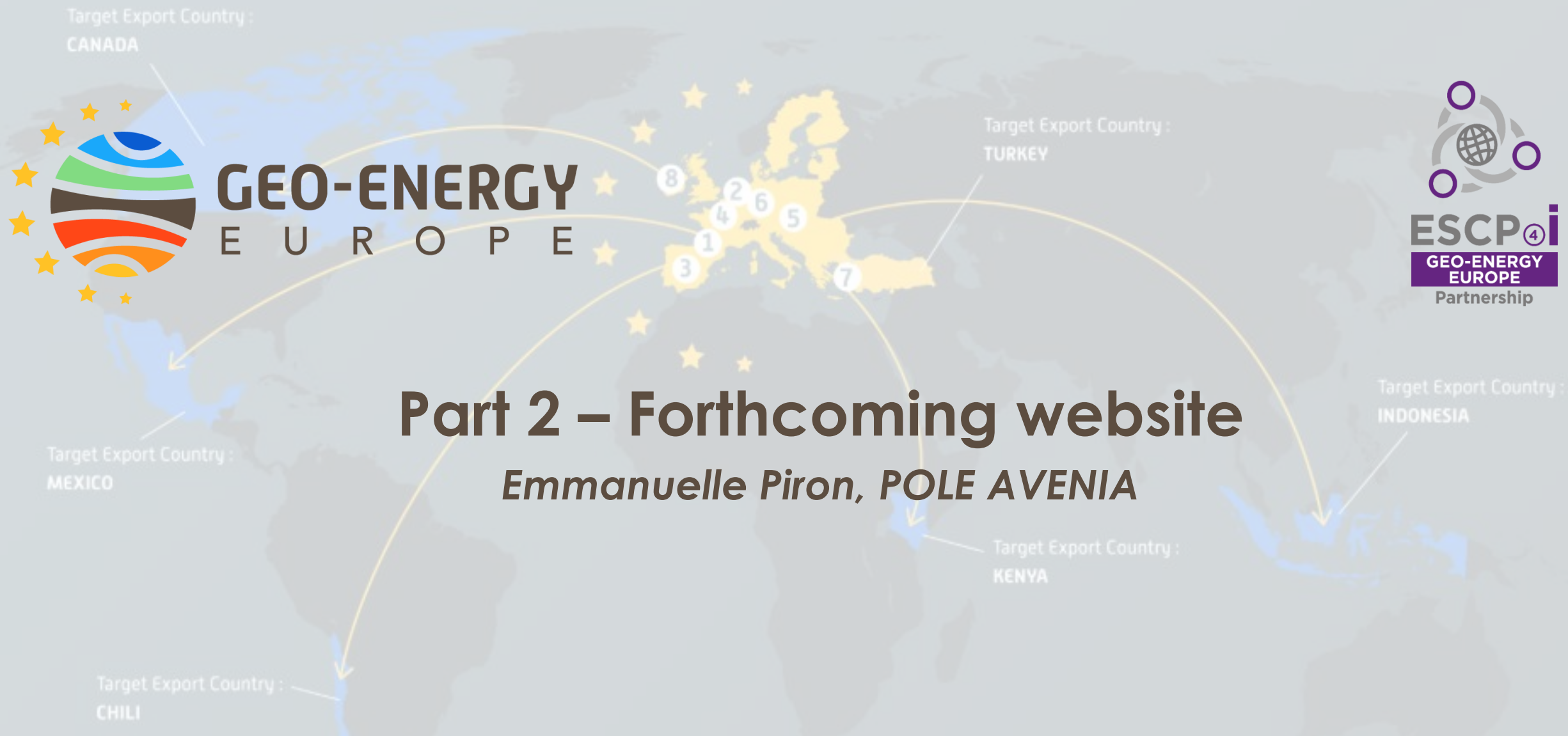
We are here

| WP  | Task  | M1  | M2 | M3 | M4  | M5 | M6     | M7            | M8 | M9 | M10 | M11 | M12    | M13    | M14 | M15 | M16 | M17 | M18    | M19 | M20 | M21 | M22 | M23 | M24   |
|-----|---|-----|----|----|-----|----|--------|---------------|----|----|-----|-----|--------|--------|-----|-----|-----|-----|--------|-----|-----|-----|-----|-----|-------|
| WP1 | Project Management                          | VM1 | T  | T  | VM2 | T  | T/D1.1 | VM3<br>D2 Mi2 | T  | T  | VM4 | T   | T/D1.2 | VM5    | T   | T   | VM6 | T   | T/D1.3 | VM7 | T   | T   | VM8 | T   | T/D12 |
| WP2 | Capacity building - Clusters visits         | Mi1 |    |    | VM2 |    |        |               |    |    | VM4 |     |        | VM5    |     |     | VM6 |     |        | Mi6 |     |     | VM8 |     |       |
|     | Capacity building - Value chains map + SWOT |     |    |    |     |    |        |               |    |    | D3  |     |        |        |     |     |     |     |        |     |     |     |     |     |       |
|     | Partnership Agreement                       |     |    |    |     |    |        |               |    |    |     |     | D4 Mi3 |        |     |     |     |     |        |     |     |     |     |     |       |
|     | Communication strategy                      |     |    |    |     |    |        |               |    |    |     |     |        | D5/Mi5 |     |     |     |     |        |     |     |     |     |     |       |
| WP3 | Market & opportunity analysis               |     |    |    |     |    |        |               |    |    |     |     |        | Mi5    |     |     | D6  |     |        |     |     |     |     |     |       |
| WP4 | Internationalisation strategy & road map    |     |    |    |     |    |        |               |    |    |     |     |        |        |     |     |     |     | D7     |     | D8  |     |     |     |       |
|     | Short term implementation                   |     |    |    |     |    |        |               |    |    |     |     |        |        |     |     |     |     |        |     |     |     |     | D9  | D10   |

- Achievements to date ★
  1. Partnership agreement
  2. Communication strategy
  3. Market & opportunity report on targeted third markets: Kenya, Indonesia, Mexico, Chile & Canada

- Key upcoming deliverables ★
  - Internationalisation strategy & road map
  - International mission(s)
  - Cooperation agreement(s) with third country organization(s)
  - + Cross-sectorial cooperation agreement





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# [www.geoenergyeurope.com](http://www.geoenergyeurope.com)

[About](#)[Members](#)[Case Studies](#)[Contact](#)

+ Media & News + Events  
(pages under construction)



## Welcome to the GEO-ENERGY EUROPE website!

The GEO-ENERGY EUROPE metacluster brings together the European know-how, technologies and experience in geo-energy, with an emphasis on its SMEs' offer and a focus on deep geothermal energy.

GEO-ENERGY EUROPE currently represents over 600 members, including 300+ SMEs, from 23 EU countries, and covers the entire deep geothermal value chain.



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# [www.geoenergyeurope.com](http://www.geoenergyeurope.com)



| Page         | Main functionality  |
|--------------|---|
| Home & About | General presentation of GEE project & metaccluster  |
| Members      | Listing, mapping & filtering of all 600+ members  |
| Case studies | Examples of skills, services and experience provided by members through achieved or ongoing concrete projects (industrial or R&I) |
| Media & News | <i>News related to GEE metaccluster &amp;/or members</i>  |
| Events       | <i>List of relevant events to the geo-energy/geothermal sectors and GEE participation to these events</i>                         |
| Contact      | Contact form  |

**Your feedback needed!**

**Your INPUT wanted!**

**This is YOUR tool  
for international  
visibility!**

- Get to know each other with the Members and Case studies pages
- Display your case studies to make what you are proud of visible to the world
- We are here for you: help us make this website suitable to your needs!



The GEO-ENERGY EUROPE metacluster brings together the European know-how, technologies and experience in geo-energy, with an emphasis on its SMEs' offer and a focus on deep geothermal energy.

GEO-ENERGY EUROPE currently represents over 600 members, including 300+ SMEs, from 23 EU countries, and covers the entire deep geothermal value chain

[www.geoenergyeurope.com](http://www.geoenergyeurope.com)



**GEO-ENERGY**  
EUROPE

## Website key messages:

- We cover the entire value chain
- We are skilled and experienced
- We are stronger together

→ **Get involved! (members)**

→ **Get on board! (other clusters)**

- Research, training & education
- Financing, investment insurance
- Authorities [state, local, etc...]
- Project developers/operators
- Geoscience

- Drilling
- EPC
- Production, Maintenance, Optimization
- Power/district heating suppliers
- Power/heat users/clients

- Manufacturers subsurface
- Manufacturers surface
- Cross-sectional services
- HSE

Target Export Country :  
CANADA



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EUROPE

Target Export Country :  
TURKEY



# Part 3 – Deep geothermal market & opportunity analysis of Canada, Chile, Indonesia, Kenya, Mexico: key findings – *Stephen Walsh, Geoscience Ireland*

Target Export Country :

Target Export Country :  
CHILI

Target Export Country :



**GEODEEP**



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# Overview



- Geoscience Ireland (GI) assists Irish small & medium sized geoscience companies win work overseas
- GI was tasked with completing a **Market Outlook** Report
- The aim of the report is to highlight third country markets for the export of geothermal energy related expertise



# Overview



This report is based on the synthesis of findings arising from the Work Package Three tasks outlined below;

- Task 3.2: Baseline Subsurface & Energy Market Review
- Task 3.3: Market Entry Profiles & Key Skills Gaps
- Task 3.4: Competitor Assessment
- Task 3.5: Market Penetration Indicators
- Task 3.6: Market & opportunity Report



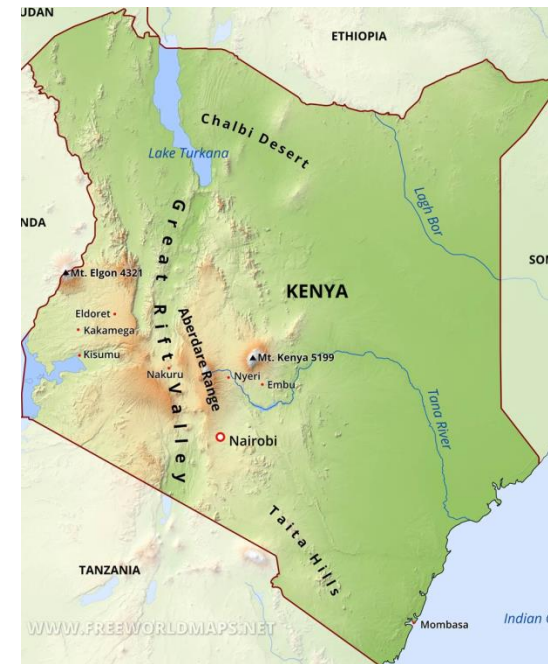
# Methodology

- Background Research
  - Internal – Work Package Two
  - External – Industry Publications, International Financial Institutions
- Member Survey
  - Third Country Market Prioritisation
- Indepth Market Analysis
  - Mexico, Chile, Indonesia, Kenya & Canada

# Third Country Markets



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# Kenya



- Strong IFI backing of geothermal energy development
- Low Risk Market
- Specific Areas of Interest on the part of local clients
- Trade Missions to take place, Q4 2019

# Indonesia



- High risk due to political instability
- High potential from a geological perspective
- IFI projects recommendations a market entry vehicle if a project is being pursued



# Canada



- Emerging Market, limited project development to date
- Low political risk, undevelopment of the sector is a risk however
- Some private investment is taking place, based on favourable government policy sentiments



# Mexico



- Largest geothermal energy market in Latin America
- Legal framework for geothermal energy development in place
- Issues with indigenous land rights in some instances
- Overall, low risk market



# Chile



- Emerging geothermal energy market
- Legal and regulatory policy framework are being developed
- Track record of New Zealand based funding and expertise in the development of Chilean capacity in geothermal energy



# Market Entry Strategy

- Language
  - Ability to translate documents
  - Ability to translate websites
  - Ability to present in the language of the target market
- Payment
  - Ability to quote in specific markets
  - Ability to collect payment in specific markets
  - Your ability to cover the additional costs in collecting payment

# Market Entry Strategy

- Legal
  - Ease in which a company can complete due diligence
  - Ability to deal with legal complexities in the country
- Route to Market
  - Ability to sell directly to customer
  - Ability to sell through a 3rd party
- Insurance
  - The scope of cover – indemnity/Product Insurance

# Market Entry Strategy

- Logistics
  - Ability to transport to that country
  - Ability to package safely and securely to that country
- Customs Procedures
  - Knowledge of/ability to complete the appropriate documentation
- Marketing
  - Ability to tailor a message which exploits knowledge of local requirements for consultancy/product related services.



Target Export Country :  
CANADA



**GEO-ENERGY**  
EUROPE

Target Export Country :  
TURKEY



# Part 4 – Development & implementation of the internationalization strategy – *Thomas Garabetian, EGEC*

Target Export Country :

Target Export Country :  
CHILI

Target Export Country :  
KENYA

Target Export Country :  
JORDAN



**GEODEEP**



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# Internationalisation Strategy

- Objective:
  - Develop internationalisation services for SMEs
  - Further development phase to expand metacluster and federate most geo-energy clusters and SMEs under same GEE banner
  - National policy assessment and identification of any public concern
  - Engagement with authorities through cooperation partnership agreements addressing possible training & capacity building actions, dissemination of best practices by metacluster, collaborative RD&I partnerships, etc.
  - Engagement with international institutions including funding agencies
  - Support to strategic transnational partnerships (especially those engaging SMEs) in engaging in cooperation with third countries (e.g. collaborative business platform for joint answers to call for tenders)

# Internationalisation Strategy

- Assessing the success of internationalisation
  - Growth of the metacluster through the connection with new clusters;
  - International connections with non-European clusters:
    - Number of cluster to cluster meetings;
    - Establishment of long-term relationships with non-European clusters: signature of cooperation agreements.
  - Raise awareness: e.g. cluster-to-business meetings;
  - Creating direct connections between SMEs that are part the clusters that compose Geo-Energy Europe and target companies or clusters:
    - Business to business meetings;
    - International missions
  - Raising awareness about the European geo-energy know-how;
  - Public presentation of the Geo-Energy Europe meta-cluster;
  - Representation at international geo-energy events.
  - Number of countries attained in the internationalisation process, and number of connections per country, achievement of the roadmap;
- **What other metrics would you consider relevant?**

# Internationalisation Strategy

- Characteristics of key target countries:
  - Well established knowledge of geothermal resources;
  - Clear framework for investments in new geothermal projects (e.g. clear objectives for developments, well defined call for tenders, multiple existing ongoing projects);
  - Attractiveness for foreign investors (e.g. availability of return of experience from private companies involved in a target country);
  - Robust legal framework allowing to recoup investments: the legal framework should be robust enough for investors to have sufficient certainty that non-technical and non-market factors will not prevent recouping their investments in a target country.



# Internationalisation Strategy

- Identifying the right partners:
  - Members of the Metacluster;
  - Key actors in target countries
    - Geothermal associations, large national developers, public authorities...
  - International and national institutions:
    - EIB, World Bank, ministries...

**What partners do you see as a priority to facilitate internationalisation for the GEE metacluster?**

# Internationalisation Strategy

- Instruments of the internationalisation:
  - International events;
  - B2B, C2C meeting;
    - E.g. Trade missions
  - Webinars: capacity building.
- **What instruments would you consider a priority for the metacluster?**

# Internationalisation of the Metacluster

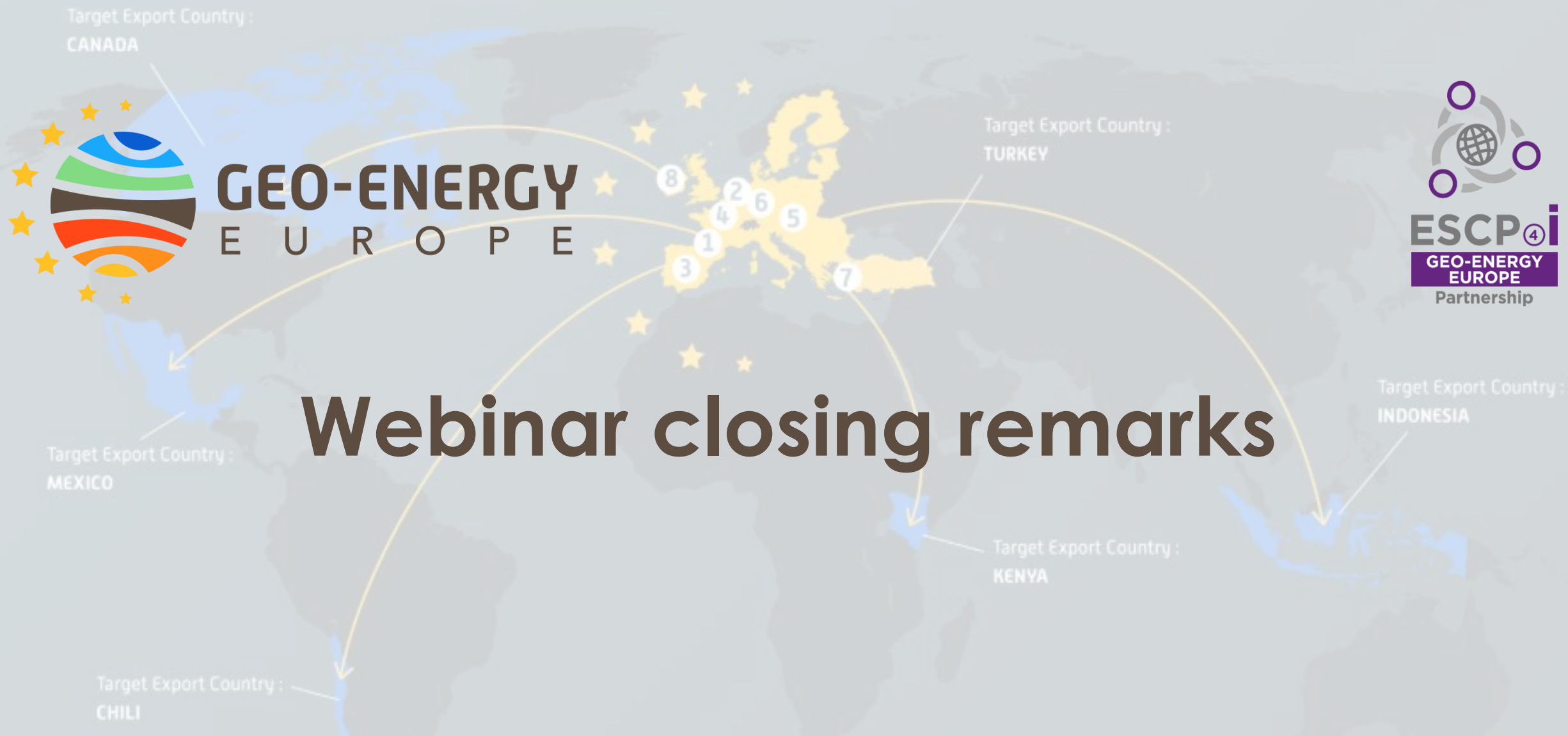


- Outline of upcoming next steps:
  - Identify contact persons and engage with all entry points identified in market report for all 5 targeted markets
  - Organize pilot international mission to introduce GEE metacluster and selected SME members, draft & sign cooperation agreement, etc.
  - Strategic events to attend and/or make GEE visible to: upcoming EGC2019 in Den Haag with common booth.



# Internationalisation strategy

- **What are your expectations?**
- **Should the strategy focus on capacity buildings? Awareness raising? Organisation of trade missions?...**
- **In terms of next steps, how would you like to be involved in the GEE Metacluster activities?**



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# Webinar closing remarks

- Objectives (reminder):
  - Reach out to you (cluster partners' members) and get you familiar with GEO-ENERGY EUROPE project & activities
  - Get you involved:
    - In making your skills, services and experiences visible through profile & case studies on the **website**
    - In **co-developing internationalisation strategy**, helping us prioritize action items of road map, and anticipate Phase 2 of GEE project to best suit your needs
    - In preparing, and **participating to, international events / missions** under GEE banner
- Next steps:
  - **Market report** available upon request to all GEE partners' members
  - **Online survey** to collect feedback and interest in providing case studies, participating to strategic planning & international events + **telephone interviews**
  - **Webinar #2 on EU markets & Turkey** (business mission + IGC Turkey in Nov 2019) in early July (tentatively July 9)

Target Export Country :  
CANADA



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EUROPE

Target Export Country :  
TURKEY



## Contact:

- Emmanuelle Piron, POLE AVENIA: [emmanuelle.piron@pole-avenia.com](mailto:emmanuelle.piron@pole-avenia.com)
- Stephen Walsh, Geoscience Ireland: [stephen.walsh@gsi.ie](mailto:stephen.walsh@gsi.ie)
- Thomas Garabetian, EGEN: [t.garabetian@egec.org](mailto:t.garabetian@egec.org)

or via website Contact page

Target Export Country :  
INDONESIA

Target Export Country :  
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Target Export Country :  
MEXICO

Target Export Country :  
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# Thank you for your attention!



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