



EUSPA enabling GNSS applications and monitoring the market and user technology

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United Nations/Mongolia Workshop on the Applications of Global Navigation Satellite Systems

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A new EU Space Programme

With the new regulation, **space data is at the heart of a technological revolution**



EU space activities under one umbrella:

Galileo

Global satellite navigation and positioning system (GNSS)

EGNOS

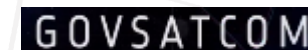
Makes navigation signals more accurate and reliable

Copernicus

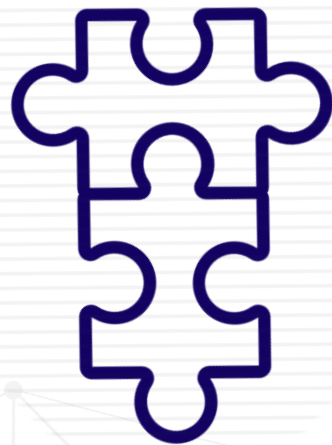
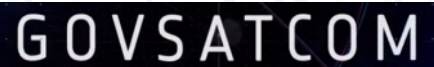
Earth Observation (EO) and monitoring based on satellite and non-space data

GovSatCom

Secures satellite communications for EU governmental actors



MKD mission - A unified market approach enables to create more synergies among the program components



Market & User Knowledge



Extended Market and technology monitoring and forecasting

Extended and synergic User Consultation Platform

Better understanding the MS needs and adding Copernicus Other Users satisfaction survey

Demand Support



A common market segments approach for all EU space downstream

Extended key account with main players of the value chain

Offer Creation



Creation of new "made in Europe" products and services.

Large implementation of end-to-end solutions leveraging synergies.

Supporting entrepreneurship, SMEs and start-ups.

Our integrated approach has shown to be effective bringing concrete results



MASS MARKET

- ✓ 2 billion Galileo-enabled smartphones
- ✓ 42 global smartphone brands have integrated Galileo
- ✓ Over 600 smartphone models are Galileo-enabled and 144 are support Galileo dual frequency

AUTOMOTIVE MARKET

- ✓ 55 car brands selling +150 EGNOS and Galileo-enabled models
- ✓ 15 million cars enabling Galileo worldwide and 9 million in EU
- ✓ Galileo is tested in vast majority of Autonomous Vehicles prototypes

PROFESSIONAL MARKETS

- ✓ EGNOS integrated in all mapping devices
- ✓ Galileo integrated in 80% of receivers for surveying
- ✓ 97% of new tractors in Europe using GNSS to optimize Agriculture
- ✓ Over 2 million GNSS-enabled T&S devices installed worldwide in 2020

Extended Research & Innovation as integrated strategic tool for the uptake



Horizon 2020 & Horizon Europe

User Technology

Adoption Grants

Entrepreneurship initiative



Highlights from the GNSS Market Report issue 6



Available for download for free

The 6th edition of the GSA's GNSS Market Report includes among other topics:

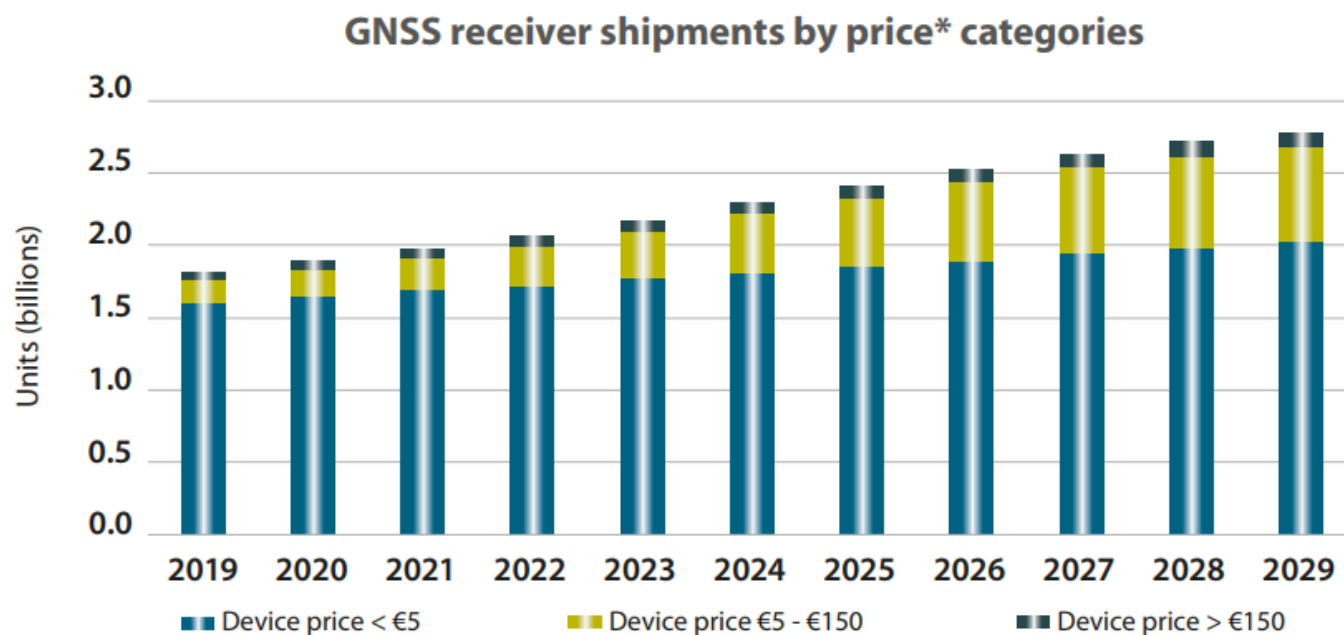
- General overview of the global GNSS market common to all application areas
- In-depth analysis of ten market segments:



- Editor's special: GNSS for Newspace

<https://www.gsa.europa.eu/market/market-report>

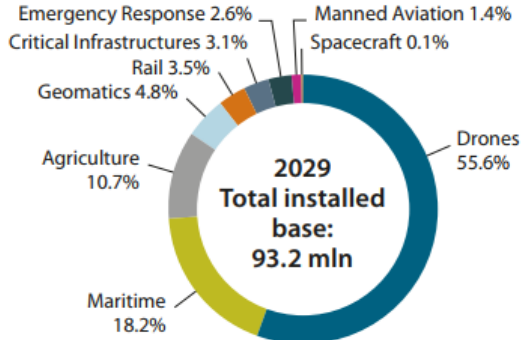
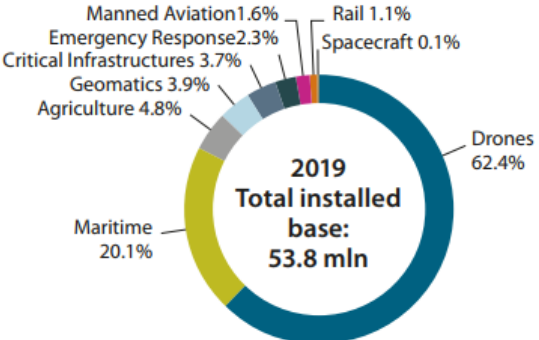
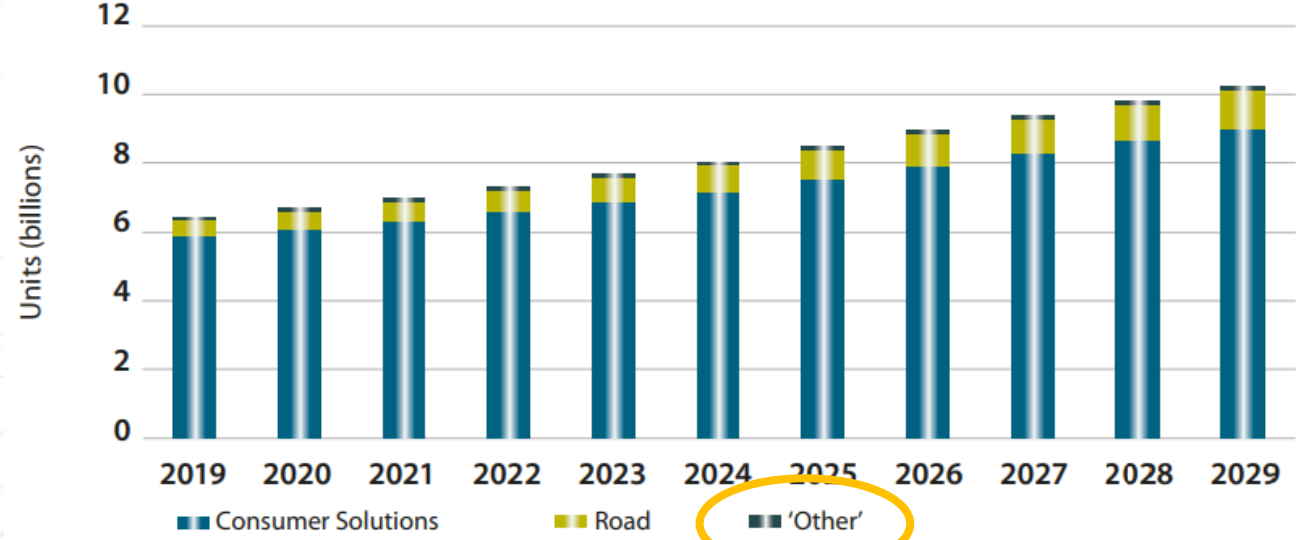
Shipments: steadily growth expected



* For multi-function devices, such as smartphones, the device price category refers to the value of GNSS functionality – not the full device price.

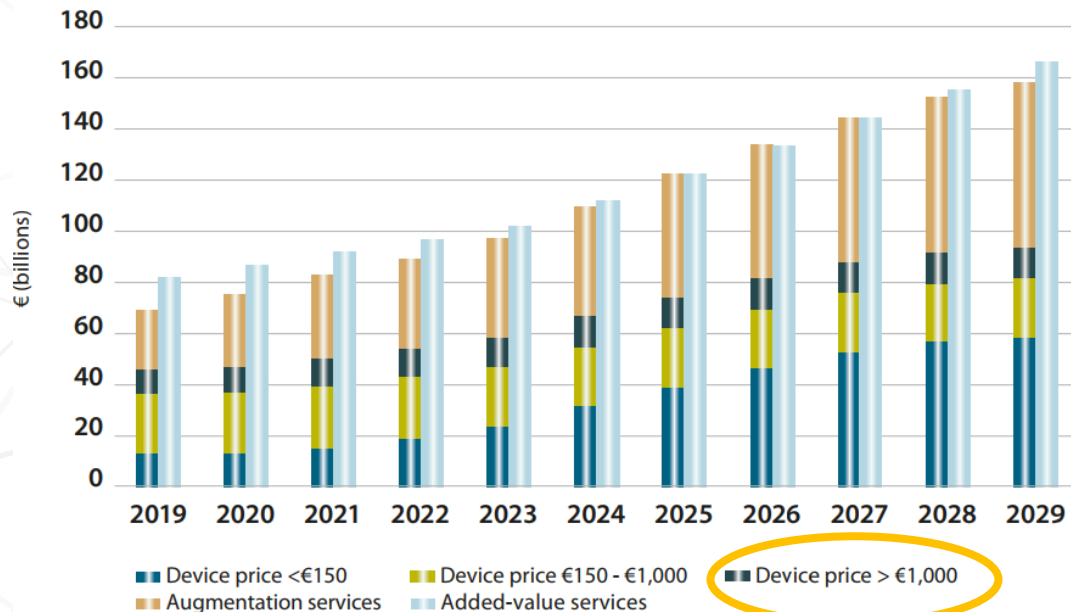
Installed base: more than 10 bln devices by 2029

Global installed base by segment



The GNSS market expansion will offer more opportunities, specially to added-value services which account for more than a half of total

Total GNSS Revenues



Note: For multi-function devices, such as smartphones, the device price category refers to the value of GNSS functionality – not the full device price.

Added-value services comprise services that create an added value to users by leveraging on GNSS technology



1% of total shipments but contribute more than 10% to receiver revenues

Road and Consumer solutions dominate the core revenues representing together more than 93% of the market

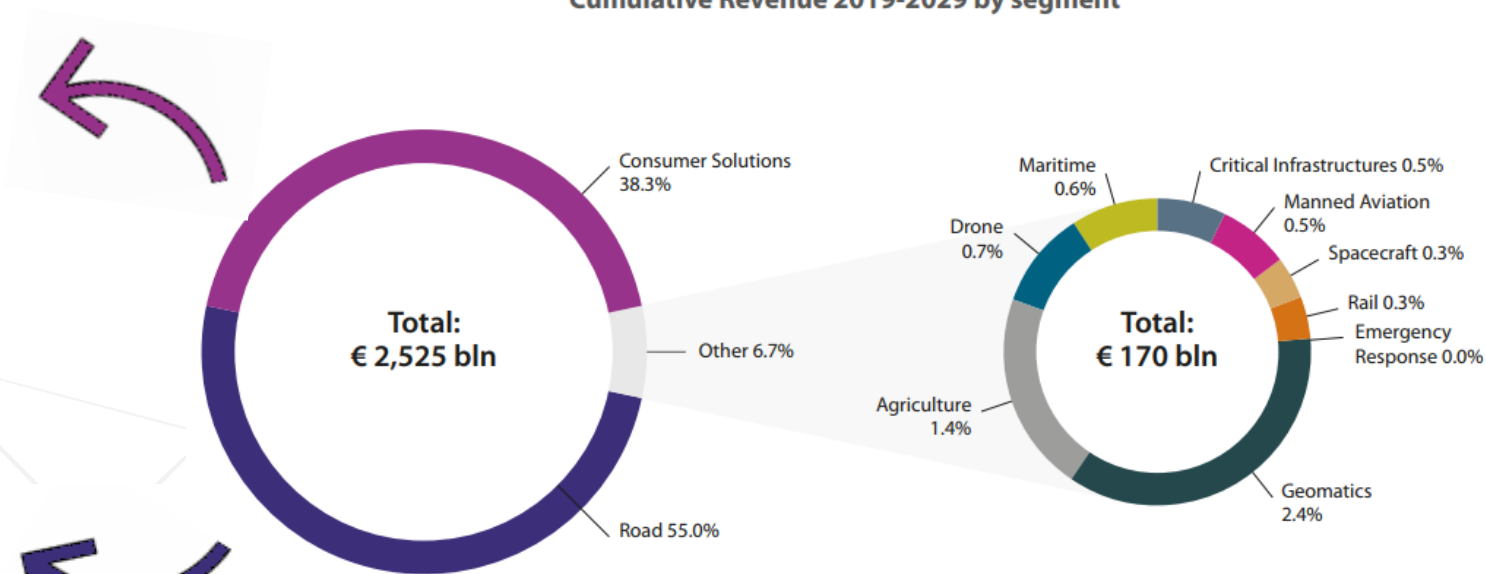
Main revenues from:

Data revenues of smartphones and tablets using location-based services

Main revenues from:

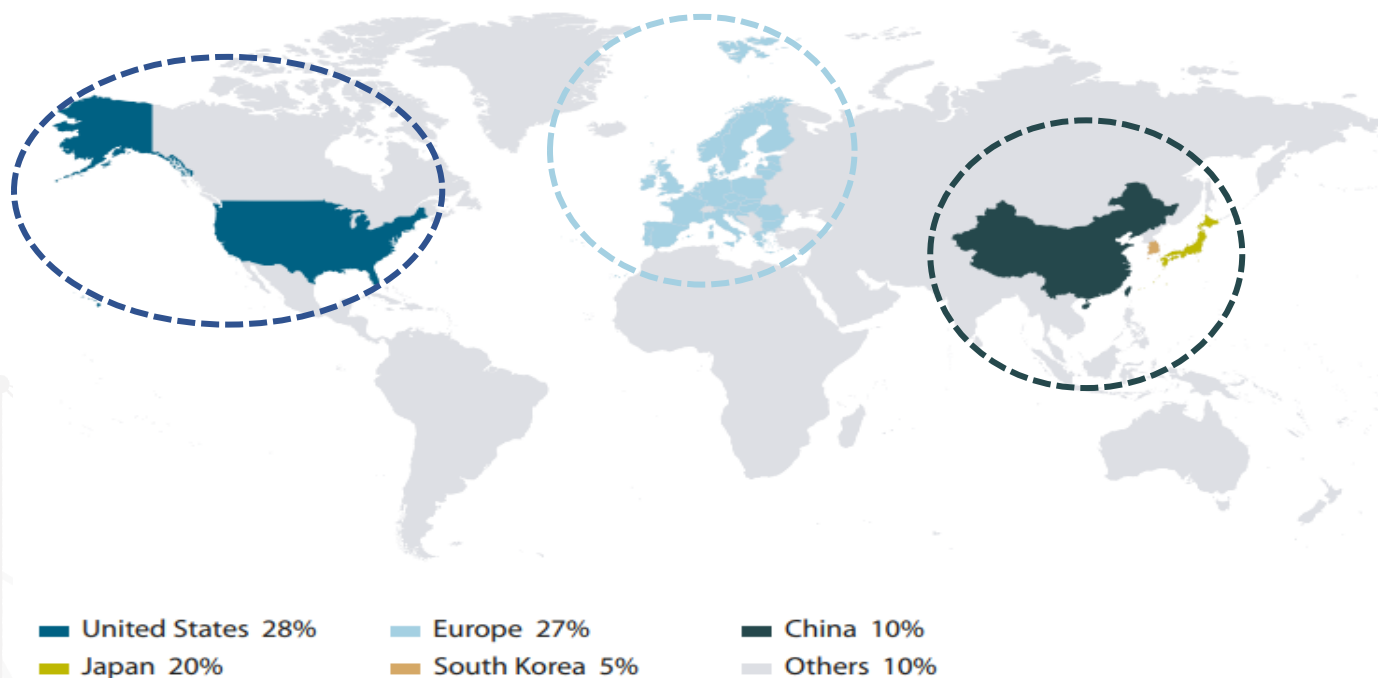
In-Vehicle Systems (IVS), ADAS and fleet management

Cumulative Revenue 2019-2029 by segment













GNSS industry's value creation is concentrated in three major geographic areas

Revenue generation in the GNSS industry by key domains
(% split of revenues 2017)



The European GNSS industry accounts for more than a quarter of the global market share

Components & Receiver manufacturers (Europe: 27%)

	Europe	North America	Asia+ Russia		Europe	North America	Asia+ Russia
	5%	50%	44%		25%	46%	29%
	49%	37%	14%		41%	28%	31%
	18%	80%	2%		51%	28%	19%
	16%	14%	70%		30%	33%	37%
	33%	37%	30%		33%	52%	13%

System integrators:

Europe's overall share is 27% driven by strong performance in

- Road (33%)
- Rail (51%)
- Agriculture (43%), and
- Aviation (34%)

Global trends affect the GNSS adoption by industries and individuals

Climate Change & circular economy



Big Data



The silver economy



Digitalization and artificial intelligence



Cyber security



The sharing economy



7th Edition of Market Report coming soon



Stay tuned!

New EUSPA EU Space Market Report with focus on both GNSS and EO will be released in January 2022

3rd edition of GNSS User Technology Report



<https://www.gsa.europa.eu/european-gnss/gnss-market/gnss-user-technology-report>

- Overview of the global GNSS market common to all application areas
- Update on GNSS new global/regional services
- Editor's special on **Space Data for Europe**



Linking space to user needs

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