EUSPA enabling GNSS applications and monitoring the market and user technology

Ulaanbaatar, Mongolia, 25 - 29 October 2021

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

Marketa Gladysev – Market Development Department
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

- 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
- 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
- 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

Initial idea | Business plan | Marketable product | Commercialisation | Expansion
---|---|---|---|---

Horizon 2020 & Horizon Europe

User Technology

Adoption Grants

Entrepreneurship initiative
Highlights from the GNSS Market Report issue 6

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:
  - ROAD
  - MARITIME
  - RAIL
  - MANNED AVIATION
  - CRITICAL INFRASTRUCTURES
  - CONSUMER SOLUTIONS
  - AGRICULTURE
  - GEOMATICS
  - EMERGENCY RESPONSE
  - DRONES
- Editor’s special: GNSS for Newspace

Available for download for free

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

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.
GNSS industry’s value creation is concentrated in three major geographic areas.
The European GNSS industry accounts for more than a quarter of the global market share.

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<thead>
<tr>
<th>Components &amp; Receiver manufacturers</th>
<th>(Europe: 27%)</th>
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<td>Europe</td>
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**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.
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

- 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

Available for download

The European Union Agency for the Space Programme is hiring!

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