GS Keynote

by

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Galileo Services Overview (1/2)

- Non-profit Making Association aiming at developing, promoting and maximizing the potential of the GNSS applications' market
- Comprising key GNSS Downstream Industry players
- Representing all elements of the value chain and covering the different application sectors (aviation, maritime, road, rail, telecom…)
- Missions:
  - Voice Industry concerns & expectations toward the institutions
  - Share market experience and knowledge of user needs
  - Support the implementation of the European GNSS Programmes

Galileo Services Overview (2/2)

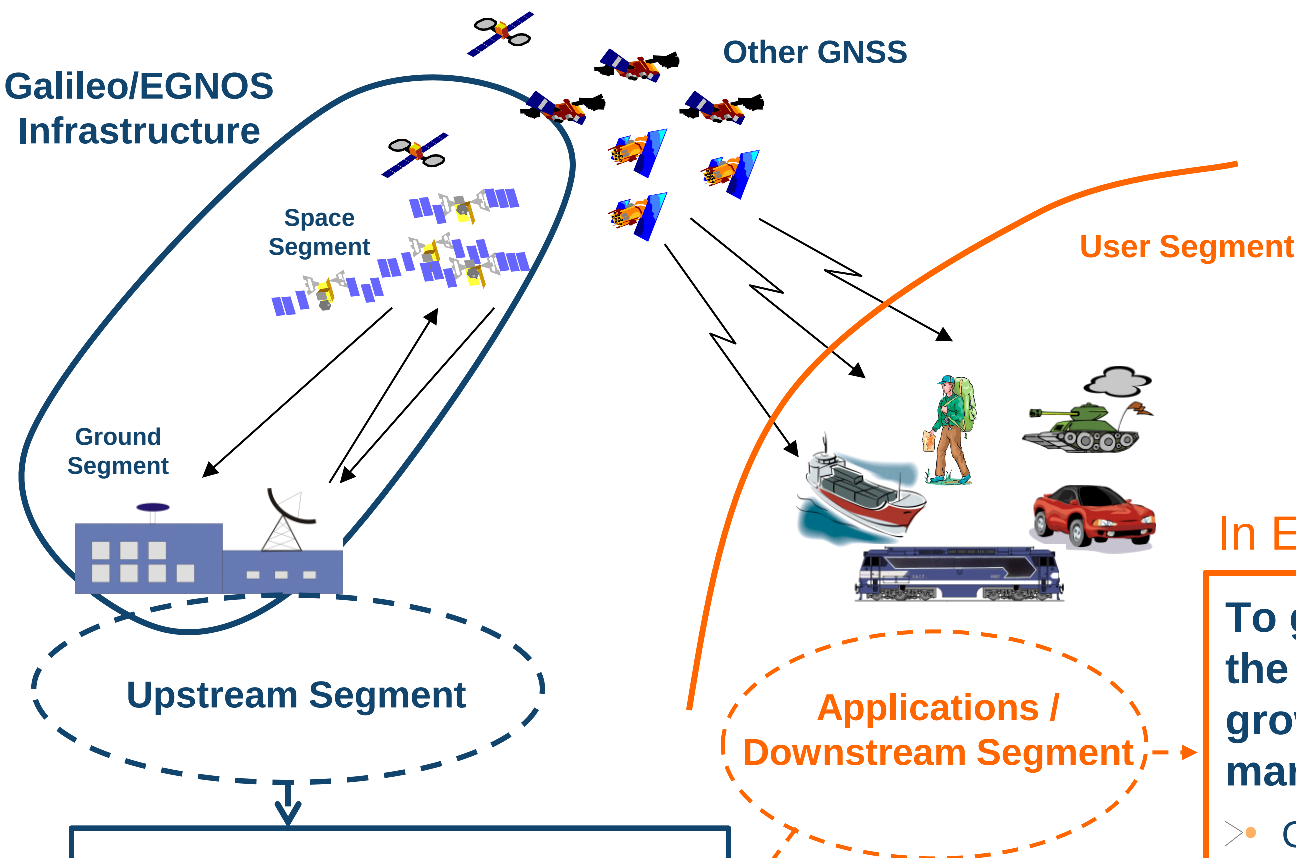
Galileo Services and Oregin
federate the most Active and Representative players
of GNSS Industry and Research supporting the European GNSS Programmes

GS & Oregin represent a community of almost 180 organisations

ORganization of European GNSS equipment and service INdustries

Necessity of an Industry Policy to support the development of the European GNSS downstream sector

Galileo Programme Main Objectives



Independence / Autonomy with regard to other GNSS (GPS, GLONASS…)

In Europe

To get a significant share of the huge and continuously growing worldwide GNSS market

- Growth / New Business Activities
- Jobs & Wealth Creation
- ROI in European GNSS

Market Trends

- GNSS applications : one of the most promising markets
  - Current market boom
  - Annual growth rate of Global GNSS market = ~**7%**
  - The **core and the enabled GNSS markets** will reach **110** B€ and **290** B€ respectively by 2023

Source : GSA GNSS Market Report – Issue 4

- Market Trends are not in favour of Europe :
  - European market share: < 20%
    - → Usual Europe Market share in other High-Tech Sectors : 33%

- Main Rationale: European GNSS downstream industry suffers from a dramatic competitive disadvantage vis-à-vis industry from other regions
  - Dedicated national programs/strategy in the US, Russia, China, and Japan to support competitiveness of their industry & to enhance GNSS market take up, including:
    - → Massive funding from R&D to manufacturing capabilities
    - → Regulation
    - → Massive Public Procurement

Major Risks

- Risks for the EU Industry:
  - Difficulty for EU Industry to survive on the GNSS global market
  - Market boom window of opportunity soon closed for the European industry
  - Last chance: Galileo early services exploitation phase (2015-2020)

- Risk for EU Autonomy:
  - Dependence on GNSS increases together with the Market
  - Galileo may not be used as intended
    (little interest for most of the applications to track 4 constellations, whereas GPS, GLONASS and BEIDOU are already in place)
  - Critical or most of Galileo equipments are not manufactured in Europe

- European Autonomy
  if Galileo is widely used with equip/apps made in Europe

- Socio-Economic expectations
  if European industry succeeds to get a reasonable share of the market

Opportunities ahead

- Number of key GNSS application markets on which European Industry must position
  - Most promising markets in terms of growth potential
  - Strategic markets
- E.g. Road (e.g. ITS, connected vehicles, ADAS), agriculture, autonomous/unmanned vehicles, rail, timing, critical infrastructures, multimodal logistics, defence, Internet of Things, etc.
- Opportunity to develop new applications and services leveraging on the European GNSS differentiators, namely:
  - Compatibility and interoperability with GPS, improved performance, authentication, high precision, robustness and security
- Opportunity to re-industrialize Europe

European industry policy (1/2)

- Need of a comprehensive and assertive industry policy to support the development of EGNOS/Galileo downstream sector aiming at
  - Fostering the use of European GNSS infrastructures
  - Encouraging European Industry to develop EGNSS equip/apps
  - Fostering the manufacturing of E-GNSS based solutions in Europe
  - Supporting the European industry competitiveness on GNSS global market and fostering the emergence of European champions

An industry policy to ensure European GNSS Programme Full Success

(growth, job creation and autonomy)

European industry policy (2/2)

- Necessity to establish a European GNSS Industry Policy, presenting European ambitions, assessing objectives, and proposing means and plans to achieve these objectives
- Support from European and National Institutions is necessary for the full success of the EGNSS programmes.
- All stakeholders of the European GNSS Programmes must organise themselves and combine their strengths to ensure benefits from EU GNSS in Europe

For more than 12 years, Galileo Services and its Members are committed to the full success of the European GNSS Programmes Galileo and EGNOS

GS Position Paper 2015 coming

- An Industry Policy to support the development of the European GNSS Downstream Sector
  - Enhance the European GNSS Downstream Industry Competitiveness
  - Foster the European GNSS Uptake

- Table of Content
  - Necessity of an institutional action
  - Definition of an industry policy
  - Recommendations on the key priorities of an institutional action
  - Recommendations on programmatic elements and instruments of an institutional action

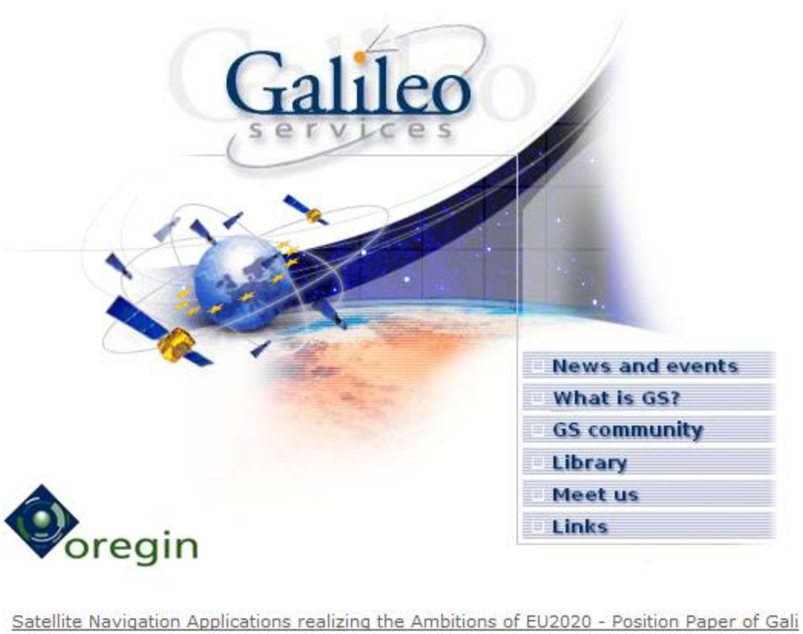
- Publication: mid-May for wide consultation within European downstream sector

Conclusion

Necessity of An Industry Policy to Enhance the European GNSS Downstream Industry Competitiveness and Foster the European GNSS Uptake

For more than 12 years, ensuring the benefits from European GNSS Programmes in Europe has been the Raison d'Être of Galileo Services

For Further Information



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Galileo services

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ESA certification of Galileo Fixes

70% of Companies recognized by ESA as Galileo pioneers belong to GS/Oregin Community