



“Europe needs Galileo”

**Ifri, Brussels,
11th September 2007**



Galileo Services Members



- Represent all GNSS applications and services
- Initially restricted to EU countries, now opened to non EU
- SMEs represent more than 40%
- Close link with OREGIN network to bridge with more than 150 other companies (mainly SMEs from 19 European countries)
- Recently joined: NOVATEL (CA), JAVAD (US), ARGOSS (NE), EDISOFT (PO), SEIKO-EPSON (J), D-MEDIA (TAIWAN)

Galileo Services Members



Sample of Current Galileo Services Activities



- Working Groups on:
 - Standardization,
 - International Cooperation,
 - IPRs
- Position Papers circulated to Key Decision Makers and Press releases (IPRs, R&D contracting rules, programme delays...)
- Meetings with
 - ESA, EC, GJU/GSA
 - EU MS Representatives (COREPER)
 - Professional and User organisations
 - Key GNSS Industries from Asia, North and Central America
- EUGIN honorary member
- Sponsoring and actively involved in navigation conferences
 - ENC-GNSS for several years
 - Gold Sponsor of ENC-GNSS TimeNav'07
 - GS Booth at the ION GNSS 2005, 2006 and in 2007

Galileo Services – an Active Actor of the Programme

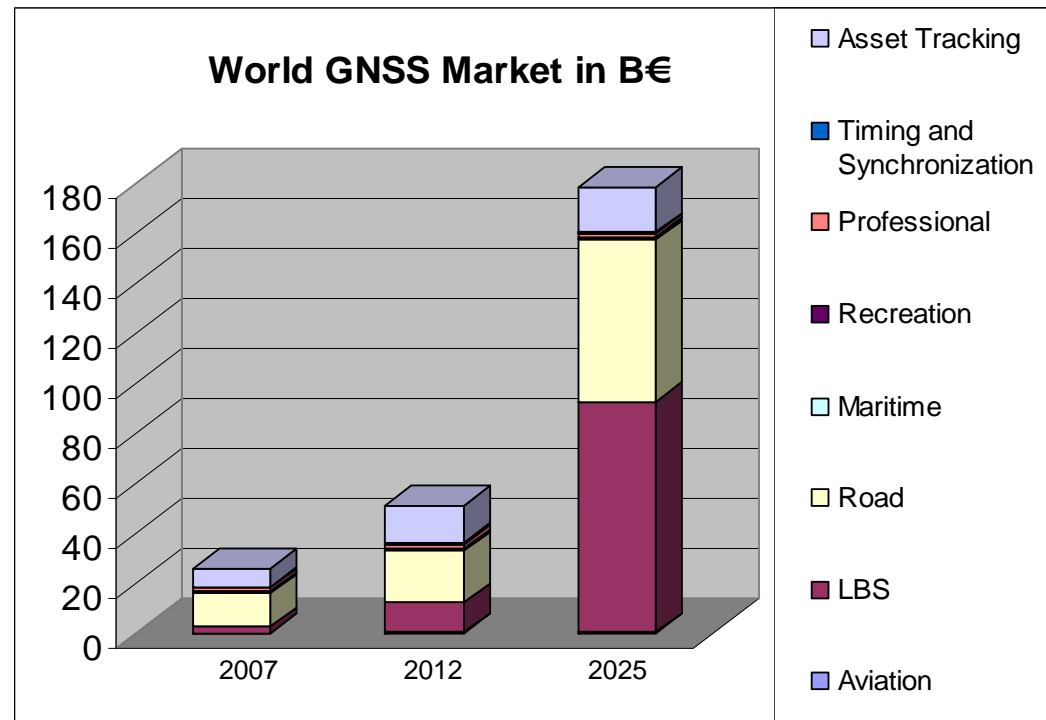


- Promotion of EGNOS/Galileo
 - Common approach and common messages enhancing the Galileo image worldwide
 - Highlight the real added value of EGNOS/Galileo from the applications perspectives
- Support GNSS R&D
 - Building on former work in new R&D activities (GSA FP7, ESA, National activities, etc.)
 - Active role in R&D Programmes Definition
- Standardisation/Certification
 - Promote European Institutions' positions on Galileo
 - Support Galileo penetration in end-user applications
- International Cooperation
 - Sharing Industry experiences on the Regions
 - Recommending technical domains for cooperation
 - Assess the impacts on Industry (positive, risks)

Galileo Programme at a Turning Point



- Huge revenues are expected from GNSS applications and services



Source: FDC
Based on review of Markets Analysis and Industry Consultation

- **European GNSS Market : 60B€ in 2025 including ~10B€ thanks to Galileo**



Galileo Programme at a Turning Point



- Galileo will boost EU GNSS downstream Industry business
- Galileo will give to European Industry a leading position in Galileo products and services development

Galileo Programme at a Turning Point



- Downstream industry has invested in R&D since the start of the programme
 - More than 200 M€ only in EU FP5 and FP6 GNSS R&D Activities
- Application & Services development and business plans have been elaborated from Galileo Programme published schedules
- Accumulated delays and programmatic problems can jeopardize the success of Galileo
 - Early R&D investment may be lost (risk of obsolescence of technology, signal definition must be frozen, services must be available for demonstrations)
 - Competing GNSS might considerably decrease the user interest in Galileo for some applications (e.g. mass market) if an operational Galileo is late

Galileo Programme at a Turning Point



- Galileo is an affordable Programme
 - Its cost represents less than 1€ per citizen/year
 - It will be reimbursed to the Member States through
 - ➔ taxes, social contributions, etc. on the high qualified jobs generated by the downstream market
 - ➔ VAT revenues on sales of GNSS products and services estimated to reach ~ 10B€ per year from 2025 back to Governments' pocket (2B€ thanks to Galileo)

- Galileo is even a profitable investment for EU citizens
 - Revenues from VAT (only) will represent 4€ back per citizen/year from 2025

Galileo Services strongly believes



- Galileo is necessary to Europe independence and sovereignty
- Galileo is one of the key projects to reach the Lisbon objective
- Galileo respond to actual User Needs
- Galileo is a chance to boost industry competitiveness
- Galileo is affordable
- Existing mechanism will allow Member States to recover investment (taxes, social charges, VAT on sales,..)

*EC communication proposes several scenarios
to put Galileo on track again.*

*Galileo Services strongly appeals to the relevant public authorities
to secure a rapid and complete deployment of Galileo*

Conclusion



Europe needs Galileo

***Let's not leave the job half done,
but rapidly deploy the Full System***