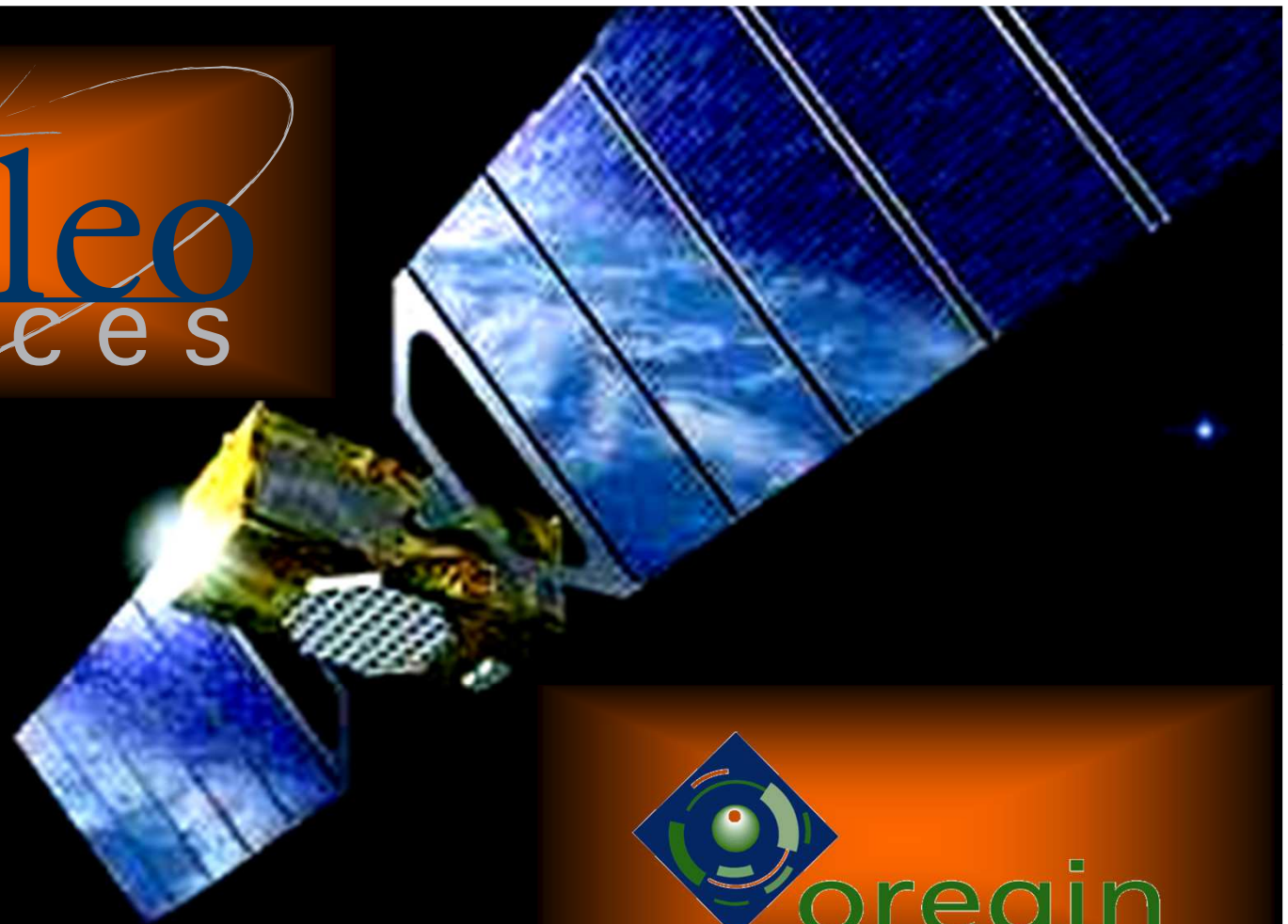




Galileo
services



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ENC GNSS 2010, Braunschweig

**Will Europe lose the battle of the GNSS
Applications Market ?**

Work for “No” as answer !

=

Galileo Services Raison d’être

Galileo Services Overview (1)



- >• 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 Galileo Programme

Galileo Services Overview (2)



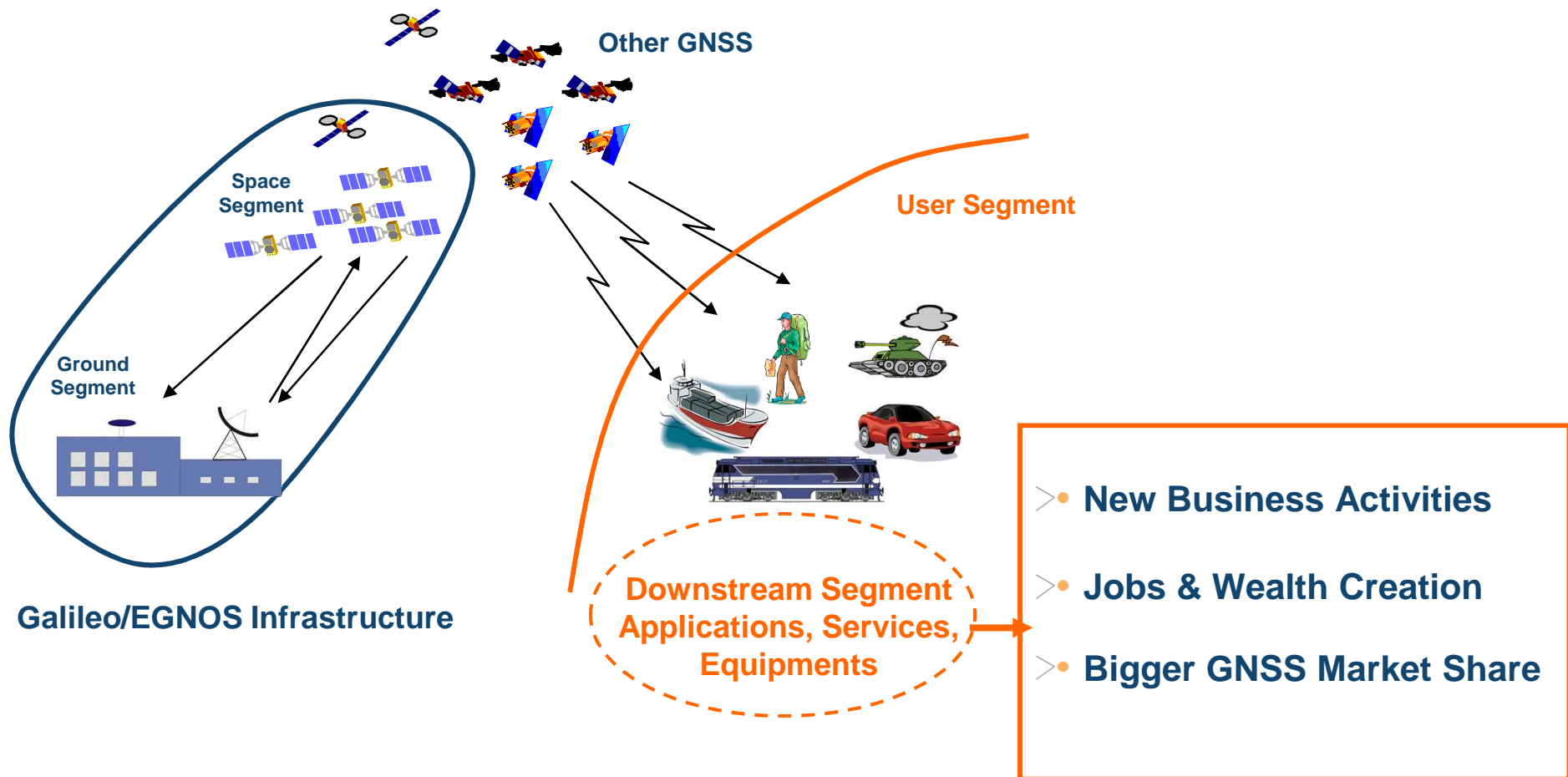
> Galileo Members:



Backing on  Network (160 Members – 20 countries)

Why ?

Why ?



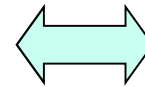
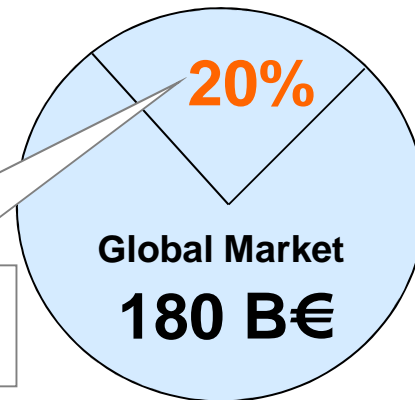
Why ?

2025: European GNSS Applications Global Market Share

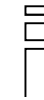
Scenario 1:

“What we can claim at best”

Current Europe market share in GNSS sector



36 B€/y
360 000 Jobs

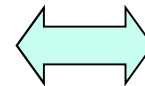
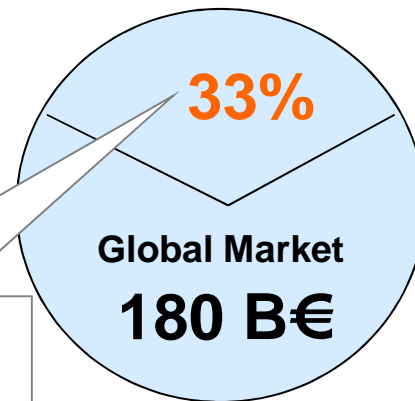


+ 24 B€/y
↔ + 240 000 jobs

Scenario 2:

“What we can aspire to”

Usual Europe market share in other High-Tech Sectors



60 B€/y
600 000 Jobs

Figures to be regarded only as orders of magnitude to set ideas

How ?

How ?



>• Challenge : For today !

- Applications Research & Development
 - Challenge towards industry
 - EU authorities to boost/fuel GNSS R&D
- Applications Standardization
- Awareness towards Industry & End-users
- International Cooperation
- Regulation

GS related Actions

Manifesto



- Lobby campaign jointly conducted by EU GNSS Industry and Universities
- **Manifesto** advocating the EC, the Council, the EP and the EU MS to consider increasing Community funding for GNSS applications R&D

**MANIFESTO FOR A MORE COMMITTED EUROPE
TOWARDS THE DEVELOPMENT OF GNSS APPLICATIONS**

2009 and 2010 are very important years for EU GNSS programmes with the official launch of the EGNOS Open service on 1st October 2009, the award of several contracts as regards Galileo's infrastructure, such as the production of 14 satellites of the constellation, and the first 2 GIOV satellites to be launched by end 2010.

Many new applications related to positioning, navigation and timing may now effectively emerge and use this infrastructure: All transport modes, precision agriculture, environment protection, assistance to people on the move, to disabled and elderly citizens, synchronisation of complex networks are some examples of the very wide domain of applications concerned. The GNSS global market of products and services which was worth €124 bn in 2008 is expected to double by 2030¹.

Nonetheless, Europe's GNSS market share is currently rather low (20%) compared to its usual share in other high-technology sectors (33%)¹. There is thus an imminent risk that Europe's industry misses a huge opportunity to develop, unless a substantial public funded support program to foster innovation, development and new business opportunities is in place. Being the owner of the Galileo and EGNOS assets, the European Union has a great responsibility in facilitating the utilisation of this opportunity to the best for Europe and Europe's citizens.

Research is proven to be the most favourable way to stimulate innovation and to develop cutting-edge applications and user segment. It is the key to success for European industry in a competitive world. In some countries like the US, China, and Russia, public funding support is driven largely by military and strategic aspects. US public funded programs are estimated to reach between 200 ME and 500 ME per year¹. In Europe though, EU GNSS programmes are driven by civilian purposes only and effectively the EU budget now is of around 15 ME a year for two years. After that, there is no allocated funding at all.

Such a tiny EU research budget will have huge consequences for EU industry in the short term. Neither will it allow for sufficient support of the SMEs which have been recognized as one of the main forces of innovation. Foreign industries benefiting from ample public funding, a strong R&D advantage and established market positions will overtake EU's market. Moreover, EU's effort to gain its independence as regards GNSS, by building its own infrastructure, will be pointless if it is dependent on foreign applications, receivers and devices.

The present context of the economic crisis also gives a strong incentive not to lose this opportunity to develop new industrial activities in Europe. Galileo applications have the potential of creating some tens of thousands of new jobs in Europe in the ten coming years.

The EU and its Member States are therefore urged to consider increasing dramatically GNSS applications research funding to give European industry, SMEs, and all the stakeholders, a chance to increase their level of uptake in the GNSS global market and to ensure EU's independence in a sector on which more than 6% of the whole EU GDP relies.

Until 2013, and in addition to the national efforts of the Member States of the Union, EU's GNSS applications and user segment R&D funding should be raised to at least 100 ME a year from 2010 on. Further, the level of EU's R&D funding through FP7 should increase to match the US public R&D investment in order to provide the European GNSS downstream industry with the means to be and to remain competitive.

The signatories of this manifesto urge the European Commission, the European Council and the Member States of the European Union to take action and achieve this aim already from 2010 on. They urge the European Parliament to bring support to this initiative.

¹ EC estimates

- Manifesto Supporters:



- + 100s of individual signatories from Industry and Academia !!!

... Equivalent to more than 350 supporters

Manifesto



**... And wide spreading to more than
300 Key Decision Makers !**

Sample of Galileo Services Actions (1)



- Regular Members' Meetings :
 - To share information
 - To discuss business opportunities
 - To establish strategic industrial alliance
 - To decide on lobby actions, etc.

- GS Members' Key Role Research & Development
 - High investment of Efforts and Resources (several tens M€)
 - GS Members are leading Core Areas of R&D

- Setting-up of Working Groups on key subjects (e.g. Standardization, International Cooperation, IPRs)

Sample of Galileo Services Actions (2)



- Preparation of Position Papers (e.g. on IPRs, R&D contracting rules, etc.) and circulation to Key Decision Makers

- Meetings with
 - Professional and User organisations
 - Key GNSS Industries from Asia, North and Central America or industry organisations

- Organisation of workshops to foster collaborative R&D initiatives among Members and beyond

Regular contacts with Institutions



Privileged relation with key decision makers

- >• At European level
 - European Commission : DG ENTR – DG MOVE – DG Research
DG BUDG – DG INFSO
 - European Space Agency
 - GNSS Supervisory Authority
 - European Parliament : ITRE, BUDG, TRAN Committees & GIP

- >• At EU MS level, with national delegates
 - European Council
 - FP7 Transport Committee
 - GNSS Programme Committee
 - Key Ministry (Research, Transport, Industry, etc.)

Conclusion



Will Europe **WIN the battle of the GNSS Applications Market ?**

We hope...

***And we work everyday
for this to happen !!!***

www.galileo-services.org

Thank you for your attention

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and backing on

