

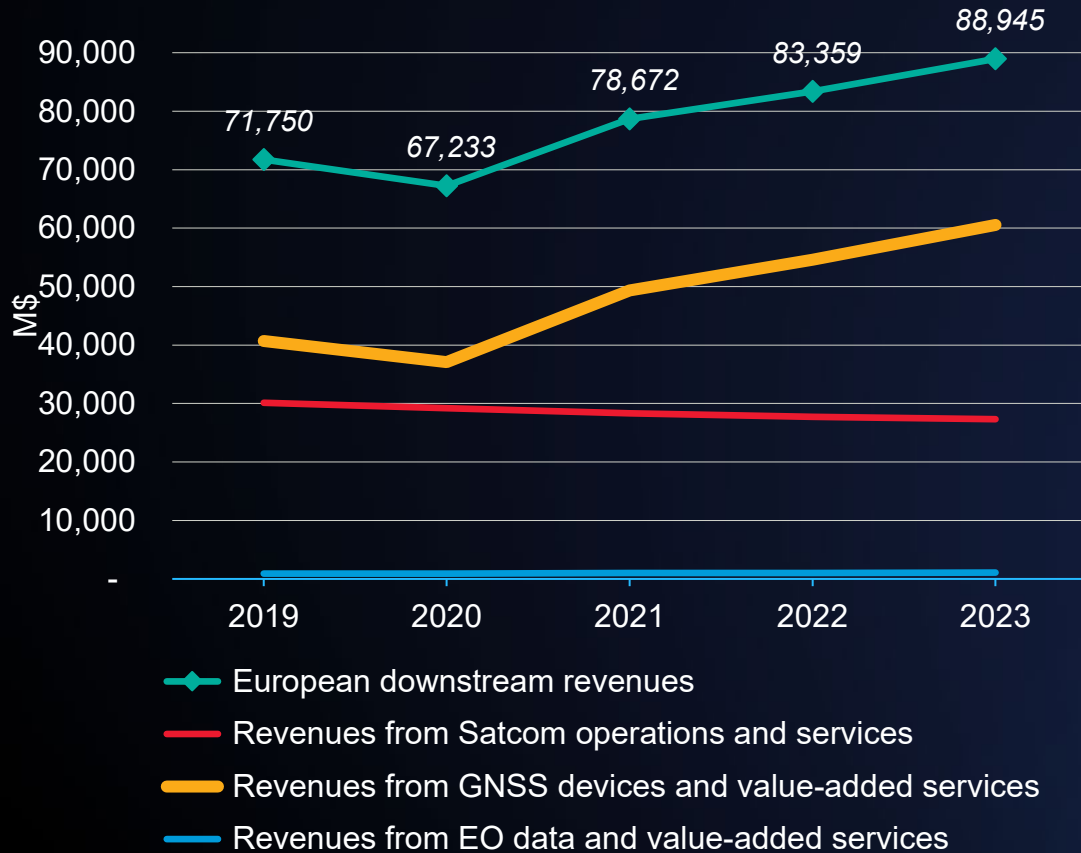
navisp

An Enabler for European PNT
Innovation and Competitiveness



European downstream revenues (M\$)

*Novaspace (Satcom, EO) - EUSPA (GNSS)

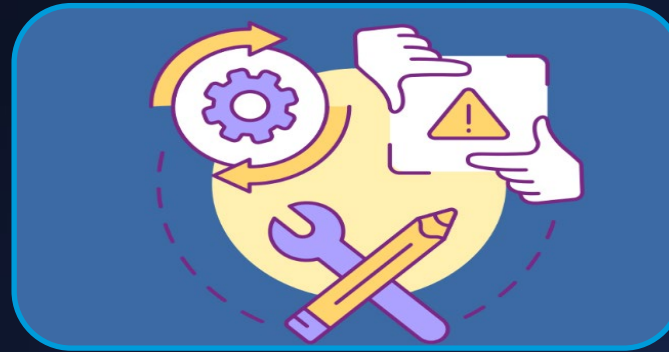


- In 2023, Global Navigation Satellite Systems (GNSS) constituted approximately **65%** of the **total downstream space market**
- Global GNSS Market size estimated to reach US\$355.3 billion by 2030, growing at a **CAGR of 9.6%** by 2030.
- Europe captures **~23%** of the **total downstream market**, sustaining a stable market share in the past years.
- GNSS revenues are derived from **device sales** and **GNSS-enabled services** (location-based applications, consumer applications)
- PNT systems, particularly GNSS, serve as a **fundamental component of modern infrastructure**, essential for sectors such as transportation, telecommunications, and national defence.
- Substantial growth → offers long-term opportunities for **investment and innovation**.



Market challenges

- Underdeveloped Consumer market in Europe.
- Increasing competition in Professional & business markets across the world
- Business Model Innovation for PNT when GNSS is generally free.



Regulatory and Political Challenges

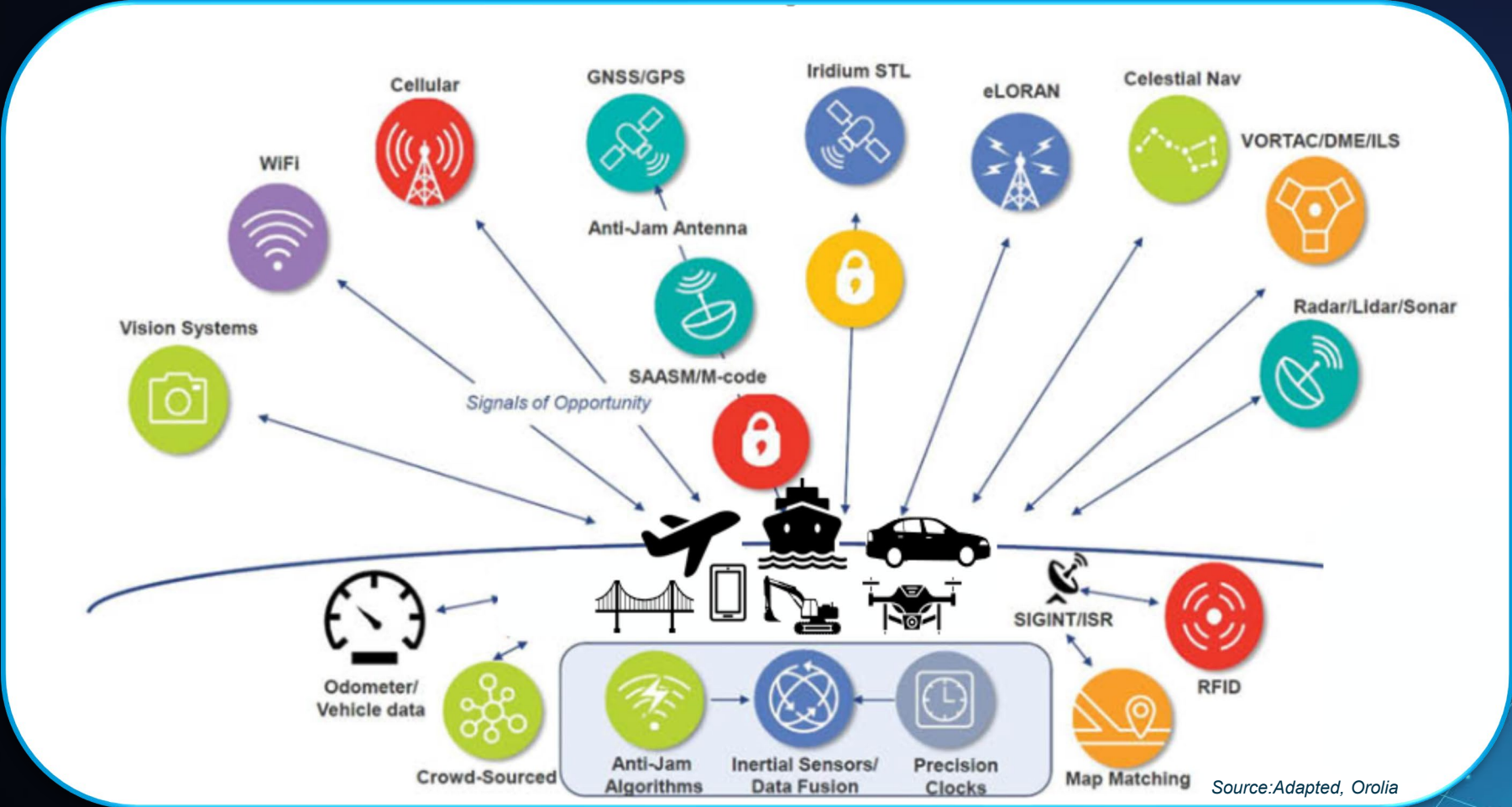
- Geopolitical situation, pushing for certain systems in areas of influence
- Fragmented PNT landscape
- Lack of Standardisation and Certification



Technical Challenges

- GNSS limitations including multipath effects, poor indoor performance, jamming & spoofing.
- Digitalisation into complex digital ecosystems.
- More stringent requirements to support new applications (ADAS, AR, etc.)
- GNSS as single point of failure

Need to invest in alternative, complementary PNT



Key trends global PNT systems



NAVISP: NAVigation Innovation and Support Programme:

- ESA's programme focusing on **PNT (Position, Navigation, Timing)** innovation and competitiveness
- Supporting European PNT champions sharing and mitigating R&D risks
- Leveraging on ESA's heritage on European PNT





Element 1: Innovation

Develop novel PNT-related systems and technologies along the entire value chain.

Pave the way for future products and services



Element 2: Competitiveness

Improve European industry's capabilities in the global market for PNT technologies and services (products and services)



Element 3: Support Member States initiatives

Support European National Programmes along the whole value chain



ESA DRIVEN

BASED ON YEARLY WORKPLAN



FULLY FUNDED



INDUSTRY DRIVEN

BASED ON OPEN CALL FOR PROPOSALS



CO-FUNDED



INDUSTRY DRIVEN BY INSTITUTIONAL NEEDS

BASED ON OPEN CALL FOR PROPOSALS



FULLY FUNDED

navisp highlights to date

Close to 350 activities initiated

Presence across the whole value chain:

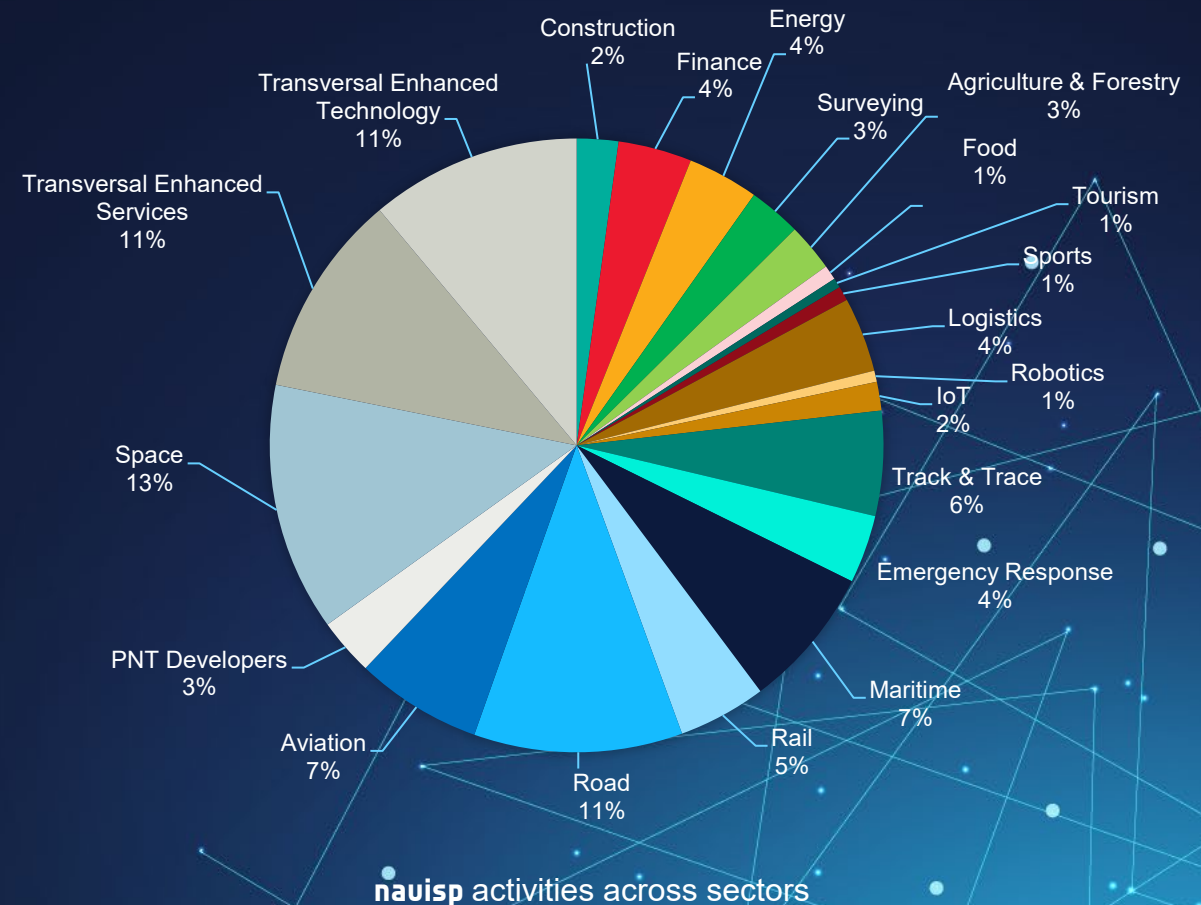
- Novel PNT concepts
- Upstream demonstration missions
- PNT-related downstream products & services
- Test-centres and demonstration infrastructure (National Policy Support)

Over 300 entities working with NAVISP:

- 56% belong to non-space economic sectors
- 45% have never worked with ESA before
- 48% of funding allocated to SME's (as Prime)

Value for money:

- Target efficiency on 15%
- Recognised as gateway to ESA's expertise on PNT



Why work with navisp?

- PNT focus:
 - Covering the whole PNT, not just GNSS
 - Significant risks to tackle: productization, strong competition from other regions, upcoming national policies.
- Supporting industry:
 - Sharing and mitigating risk across the R&D product cycle – technology, market, regulation
 - IP developed by industry, for industry
 - ESA brand, a door opening
- ESA support and expertise in PNT
 - Dedicated ESA staff support
 - International industrial & institutional network



Additional subscriptions:

- 2024 – PL, BE, DE, UK, IT, CH, IE
- 2025 – DE just increased its subscription again.
- IT has announced a new upcoming subscription ahead CMIN-25.



NAVISP Financial Status – Austria (Jan'25)



Austria to increase its subscription to continue supporting its industry.

Element	Contribution for Industrial Activities - 2024 e.c. (€)	Funds Committed 2024 e.c. (€)	Other funds engaged 2024 e.c. (€)	Pending support by Delegation 2024 e.c. (€)	Remaining funds 2024 e.c. (€) Taking into account Pending Support by Delegation
Element 1	1,383,055	1,716,926	-	-	333,871
Element 2	2,208,359	1,524,016	-	249,840	434,503
Element 3	-	-	-	-	-
			Total remaining	249,840	100,632



navisp: Phase 4



Why nautisp Phase 4?



- Global downstream market ~\$400 B (€361.5 B)
- 65 % is GNSS (\$260 B, €235, 2023)
- > 90 % is commercial, accessible to European industry
- **Europe losing market share in PNT** (EUSPA / EIB)

European GNSS Downstream Global Market Share

Scenario 1:

“What we can claim at best”

Current European market share in GNSS sector



~ €54 B/y

+ €23.5 B/y

Scenario 2:

“What we can aspire to”

Usual European market share in other High-Tech sectors



~ €77.5 B/y

Source: Space Y / ESA

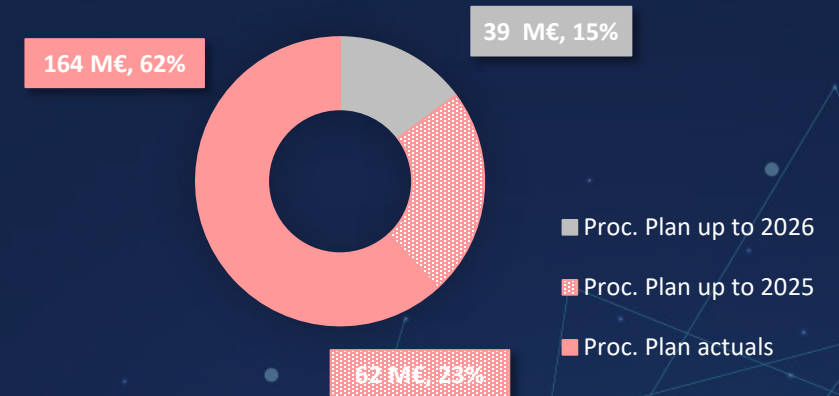
NAVISP Phase 4 - Why

- Phase 1 largely committed and remaining subscriptions planned to be transferred to close this phase
- Phase 2 committed at **88%**
- Phase 3 committed at 26%; 65% planned by CM25, **exceeding by 24 % 2024 plan**

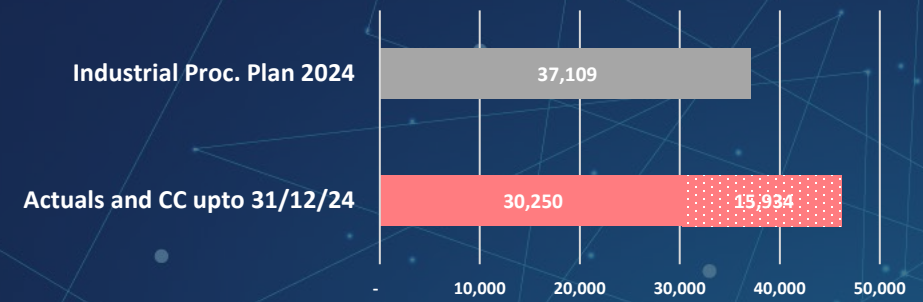
navisp as essential programme supporting European & Canadian PNT industry through the challenging global landscape by:

- Maximising the benefits of funding on PNT to **return benefits**
- **Mitigate industrial R&D risk**, facilitating new product development and access to global markets
- Support Participant States environments to **advance national PNT capabilities**

NAVISP Overall Industrial Procurement Plan = 85% at CM25



NAVISP Industrial Procurement Plan 2024 vs Actuals



nausp Phase 4 Strategic Focus

Strengthening presence across value chain:

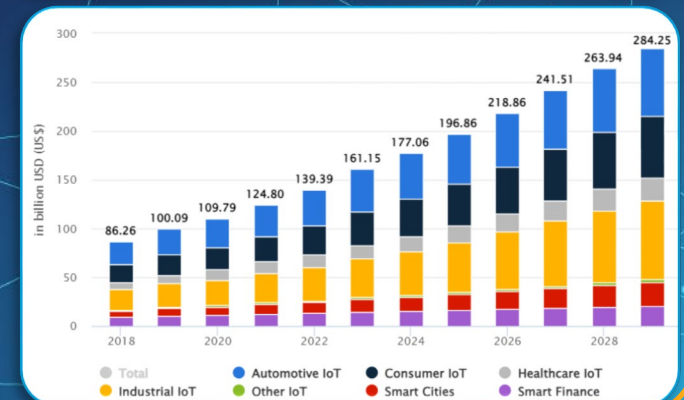
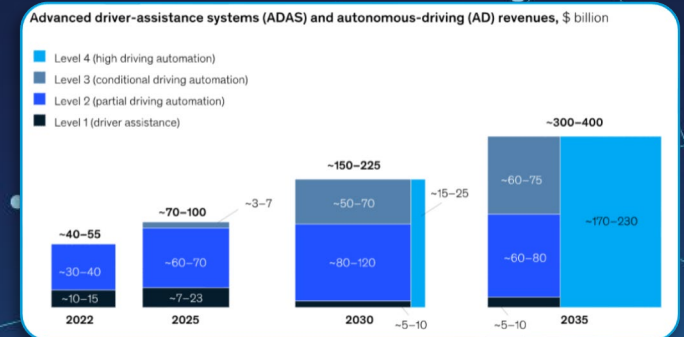
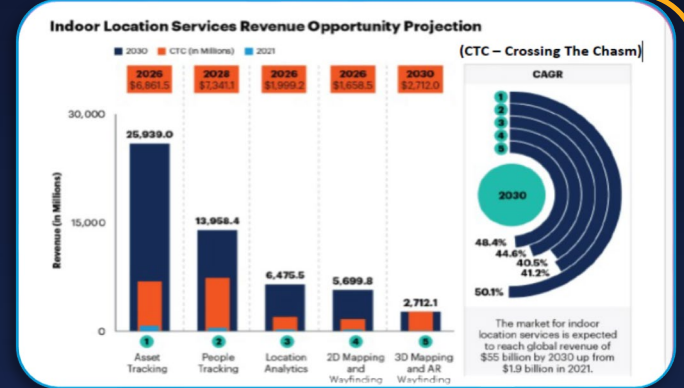
- Develop PPP with **market owners**, co-investing in long-term **partnerships**
- Support upcoming **national policies**

Reinforce Identity:

- PNT targeting R&D for **commercial opportunities**
- Deliver European & Canadian PNT **champions**
- **IP for industry** to profit from commercial opportunities

Expand **nausp** capabilities:

- Engage in **high-growth** markets
- **Simplify** programme mechanisms



- **navisp** phase 4 is **fully justified**:
 - PNT is a **growing opportunity** for European Industry
- **navisp** is the **commercially-driven** programme of NAV:
 - Innovation and development-related risk mitigation for **new PNT commercial products and services**
 - **Risk** to be shared with partners
- **navisp** phase 4 will be **more agile and responsive** to industry needs
 - **navisp** phase 4 shall drive procurement process and contract **simplifications**



navisp

INDUSTRY
DAYS
2025



navisp

MARCH 04-05, 2025

LONDON

**INNOVATE, INTEGRATE, ELEVATE:
POWERING GLOBAL PNT
COMPETITIVENESS**

IN COLLABORATION
WITH



Connect with us



- Check for upcoming NAVISP events

<https://navisp.esa.int/calendar>

- Connect with us on LinkedIn

<https://linkedin.com/company/navisp-esa/>

navisp.esa.int

Subscribe to
our Newsletter



navisp@esa.int

