

# OCEAN AND ENVIRONMENTAL TECHNOLOGIES AND SERVICES

## Part 1 : Ocean Focus

Wednesday 20 October  
9:00 AM to 01:15 PM



# Market Development for EU Space data

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EU Agency for the Space Programme (EUSPA)





# A new EU Agency for the Space Programme



The user-oriented operational Agency of the EU Space Programme, contributing to **sustainable growth, security and safety** of the EU

With the new regulation, **space data is at the heart of a technological revolution**



linking space to user needs

EU space activities **under one umbrella:**



## Copernicus

Earth Observation (EO) and monitoring based on satellite and non-space data

**Nr.1 world provider** of space data and information (>20TB/day)



## Galileo

Global satellite navigation and positioning system (GNSS)

**10% of the EU GDP** enabled by satellite navigation



## EGNOS

Makes navigation signals more accurate and reliable

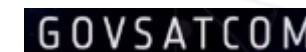
Operational in **360+ airports & helipads** in **23 countries**



## GovSatCom

Secures satellite communications for EU governmental actors

Delivering rapid support over crisis areas



## Others

...under negotiation

# EUSPA – key tasks



## Exploitation Manager



Management, operation, maintenance, improvement, evolution, and protection of infrastructure

Continuous provision of services

## Gatekeeper of security



Security accreditation of all programme components

Operational security of Galileo and EGNOS

Operation of the Galileo Security Monitoring Centre

## Market and innovation



User and market uptake

Applications

Innovation

Promotion

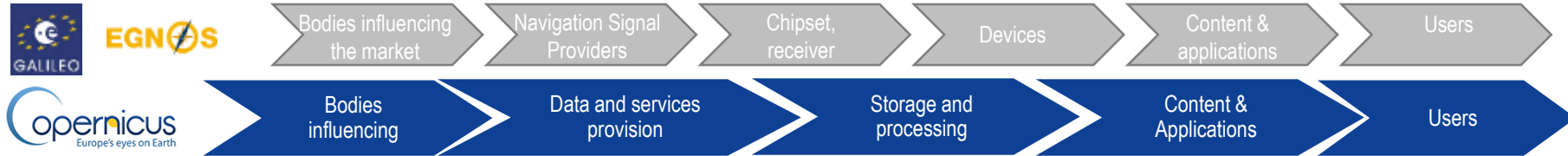
# EUSPA: strategic space-downstream goals



- 1 EGNSS as a leader + increase the **Other Users of Copernicus** + building the GovSatCom / Connectivity user basis
- 2 End-to-end solutions creating **more synergies** among the program components + EU centered management of space data
- 3 Increase the **competitiveness of EU downstream companies** (> 30% market share)
- 4 More **involvement of all MS**, especially supporting SMEs and start-ups
- 5 EU Space in support of **EU priorities**



# All EU Space Program components with an integrated market/user driven approach



GOVSATCOM



## 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, SME and start-ups.

New integrated segmentation





# Market report extended to EO/Copernicus and GovSatCom



**First Edition planned  
for end 2021**

A new market report covering  
the EU Space Program



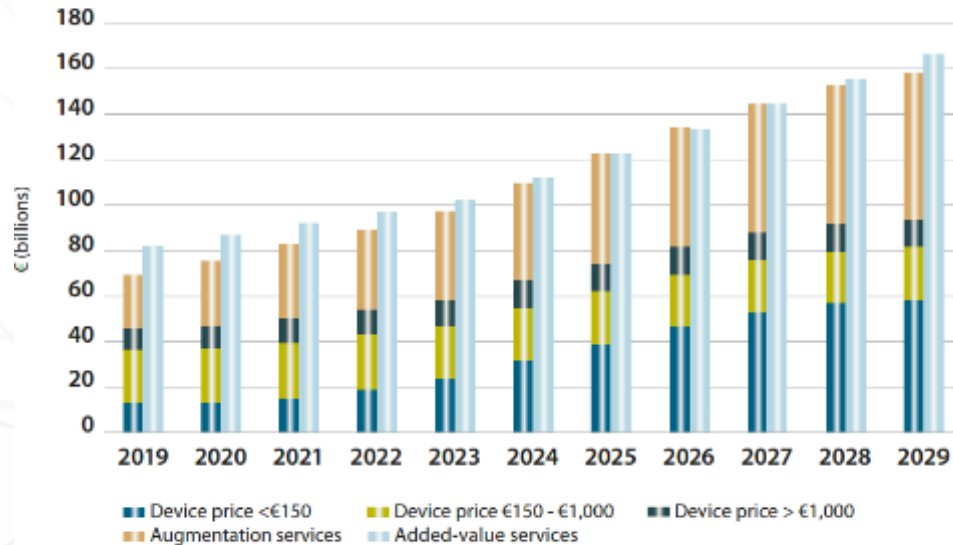
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Separate Governmental Market Report

**GOVSATCOM**

# More than 10 bln devices by 2029, offering more opportunities, especially to added-value services

Total GNSS Revenues



Note: For multi-function devices, such as smartphones, the device price category refers to the value of GNSS functionality – not the full device price.

Components & Receiver manufacturers (Europe: 27%)

	Europe*	North America	Asia+ Russia		Europe*	North America	Asia+ Russia
	5%	50%	44%		25%	46%	29%
	49%	37%	14%		41%	28%	31%
	18%	80%	2%		51%	28%	19%
	16%	14%	70%		30%	33%	37%
	33%	37%	30%		33%	52%	13%

Note: Segment share for Rest of the World is not shown in the table.

- The **revenues of GNSS applications** will reach more than 160bln € by 2029.
- In **Maritime, Drones and Emergency Rescue**, European manufacturing has an above average share of the component and receiver manufacturing marketplace

Opportunities for European developers of applications and investors in Ocean technologies



# EGNSS and Copernicus together will enable greener, more efficient and safer operations at Sea



Search and Rescue at Sea



Autonomous vessels for transport, wind farms/off-shore service, inland waterways, automatic tugs



Fisheries and aquaculture



New Vessel Traffic Services



Emissions monitoring optimised routing



Also exploring :

- Navigation in Arct
- Dredging
- Oil spill monitoring

# EUSPA-EIB strategic cooperation to increase EU share in space downstream



- In the context of the EUSPA/EIB MOU a **dedicated Working Group for Space Downstream** was set up between the experts of both organizations
- Today **very few SMEs are able to use the bank resources under existing facilities** due to the specific nature of space downstream
- A joint **consultation was launched** to understand the overall investment needs in the sector with the objective to upgrade the existing instruments and better link them with the sector needs
- **GNSS companies across all value chain in Member States can take part in the consultation here:** <http://s.alchemer.eu/s3/GNSS-investment-report>

# Thank you!

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