

ORganisation of European GNSS Industry

GPS SYMPOSIUM' 01 TOKYO

8 February 2001

The ORganization of European GNSS INdustry of equipment and services:

- **information exchange**
- **cross-fertilisation of expertise**
- **point of contact/industry voice for the European Institutions**
- **publicity and lobbying**
- **fostering co-operation with non-European industries creating opportunities in overseas and global market**

- **Foundation meeting on 16 Feb. 99**
- **5 Plenary meetings**
- **Interest expressed by Institutions**
- **Interest expressed by equipment and service industry**
- **Interest expressed by Non European industry to cooperate (Japanese, US, Israel, Canada ...)**
- **Interest expressed by other players**
- **5th plenary meeting/Workshop with EC and ESA on 1 Dec. 2000**

- **75 members including international industry organisations and national groups (more than 100 industrialists represented)**
- **Industries from 14 countries**
- **From SMEs to biggest groups**
- **Service providers, equipment manufacturers, chip producers, software developers, integrators, telecom and car manufacturers**

MEMBERS



- ACSA (FRANCE)
- ADTRANZ (GERMANY)
- ADVANCED AVIATION TECHNOLOGY Ltd. (UNITED KINGDOM)
- ADVETO AB (SWEDEN)
- AERODATA F. (GERMANY)
- AGROCOM (GERMANY)
- AIRSYS ATM (UNITED KINGDOM)
- AIRSYS ATM (GERMANY)
- ALCATEL/SEL (GERMANY)
- ALENIA (ITALY)
- BCI (FRANCE)
- BMW-AG (GERMANY)
- CAA (GERMANY)
- COM DEV Europe Ltd. (UNITED KINGDOM)
- CS Communication & Systèmes (FRANCE)
- DAIMLER CRYSLER GROUP (GERMANY)
- DSNP (FRANCE)
- DIGINEXT (FRANCE)
- EDISOFT (PORTUGAL)
- EGERY (FRANCE)
- ELNA (GERMANY)
- ERICSSON TELECOMUNICAZIONI (ITALY)
- ERTICO (INTERNATIONAL)
- EURO -TELEMATIK (GERMANY)
- EUTELSAT (INTERNATIONAL)
- FIAT (ITALY)
- GSS (UNITED KINGDOM)
- HELLENIC AEROSPACE INDUSTRY (GREECE)
- IMEC (BELGIUM)
- INDRA ESPACIO (SPAIN)
- INTECS SISTEMI (ITALY)
- LEICA (SWITZELAND)
- LOGICA (UNITED KINGDOM)
- MAN TECHNOLOGIE (GERMANY)
- MANNESMANN VDO (GERMANY)
- MARCOSOFT (ITALY)
- MLR (FRANCE)
- MORS (FRANCE)
- NAVIONICS (ITALY)
- NEXT S.p.A. (ITALY)
- NOKIA (FINLAND)
- OmniSTAR BV (THE NETHERLANDS)
- ORMSTON (UNITED KINGDOM)
- RACAL AVIONICS (UNITED KINGDOM)
- RACAL RESEARCH Ltd. (UNITED KINGDOM)
- RACAL TRACKS (UNITED KINGDOM)
- RAYTHEON (UNITED KINGDOM)
- ROBERT BOSCH GmbH (GERMANY)
- SAGEM (FRANCE)
- SAIT RADIOHOLLAND (BELGIUM)
- SATCON (GERMANY)
- SATPLAN (FRANCE)
- SEATEX (NORWAY)
- SEMA GROUP (SPAIN)
- SENA GPS (SPAIN)
- SENER (SPAIN)
- SEPTENTRIO (BELGIUM)
- SEXTANT (FRANCE)
- SKEYE (GERMANY)
- TCHIP SEMICONDUCTOR (SWITZELAND)
- TECHNIUM (FRANCE)
- TELE ATLAS (BELGIUM)
- TELEMATICA (GERMANY)
- TELECONSULT (AUSTRIA)
- TELESPAZIO (ITALY)
- TELIT (ITALY)
- TEMEX TELECOM (FRANCE)
- TERRAFIX (UNITED KINGDOM)
- THOMSON-CSF COMSYS (FRANCE)
- THOMSON-CSF AIRSYS (FRANCE)
- THOMSON-CSF DETEXIS (FRANCE)
- VAN HOPPLYNUS INSTRUMENTS (BELGIUM)

EUROPEAN GNSS INDUSTRIAL ORGANIZATIONS

- AUSTRIAN INDUSTRY (ASA)
- SCANDINAVIAN INDUSTRY (SGIC)
- SPANISH INDUSTRY (Galileo Sistemas y Servicios)

- To support the development of GALILEO users segment equipment and services,
- To provide public authorities with technical and marketing expertise and support in analysing the impact of GALILEO architecture on user equipment and services,
- To support the necessary efforts on standardisation and certification for the development of user segment equipment and services,
- To foster the identification of business opportunities and define the necessary actions to ensure their success,
- To foster partnership between industrialists and in particular between large corporations and SMEs,
- To rapidly and efficiently circulate relevant information,
- To promote EUROPEAN industry, technology, products and services,
- To encourage participation of universities and research centres in R&D activities related to GALILEO developments.

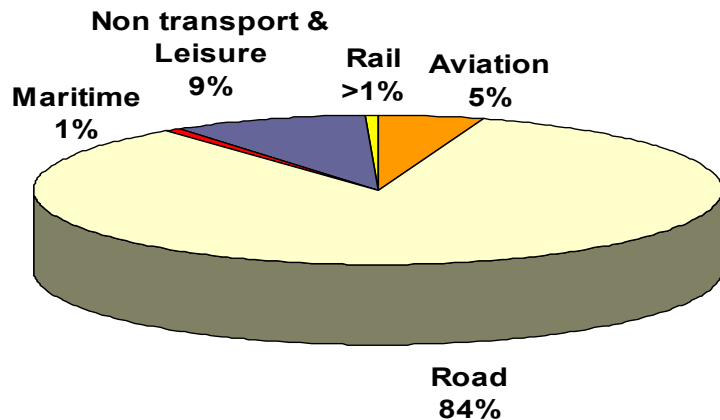
- **December 2000 was the first important opportunity for open interactive discussions between the Application Industry and the European Institutions**

Its objectives were:

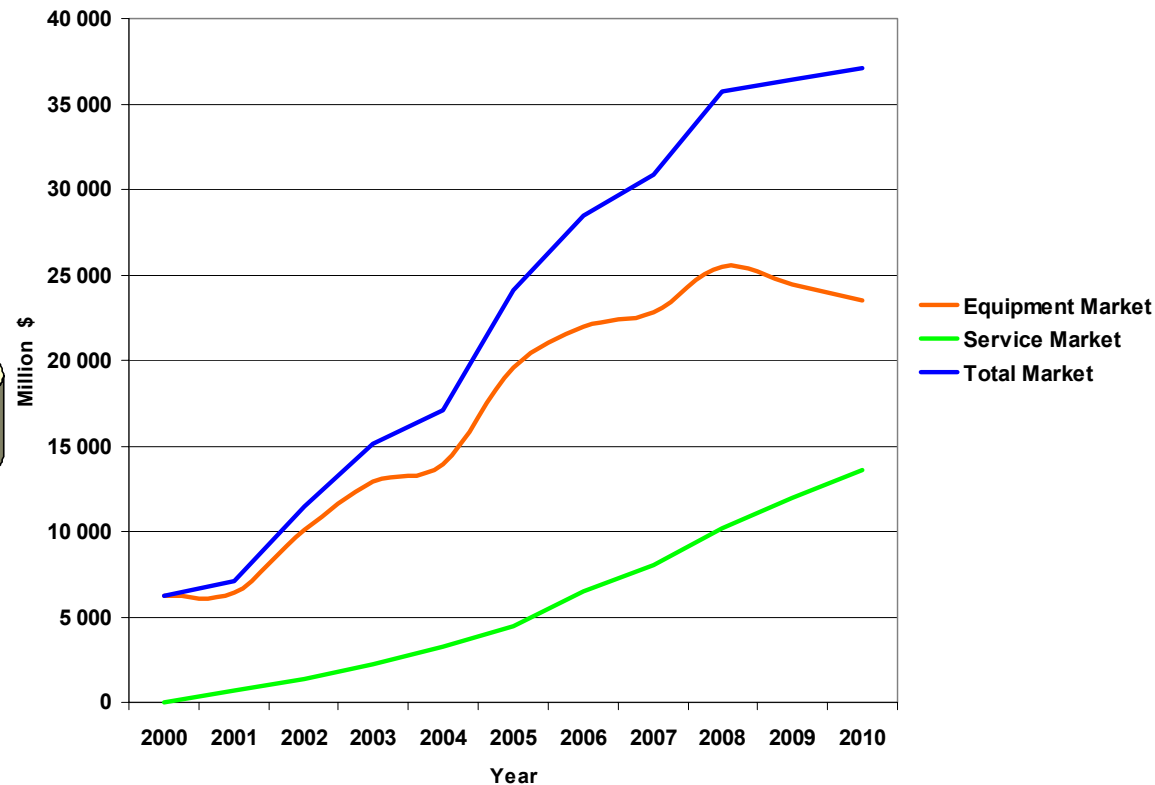
- **To keep the industry informed of the latest evolution of the Galileo Programme (including EGNOS)**
- **To confirm the strong interest of the Application Industry to support the Galileo Programme**
- **To identify the necessary actions to support and promote the Application Industry competitiveness**

- This workshop will provide an opportunity for the application industry to support the Galileo decision making process
- OREGIN industrialists will provide the European Commission, the European Space Agency and the national institutions with their views and arguments on the crucial issues:
 - Private financing for Galileo
 - Programme management
 - Service Definition
- This workshop will also aim at supporting the development of Galileo pilot projects

Market Share

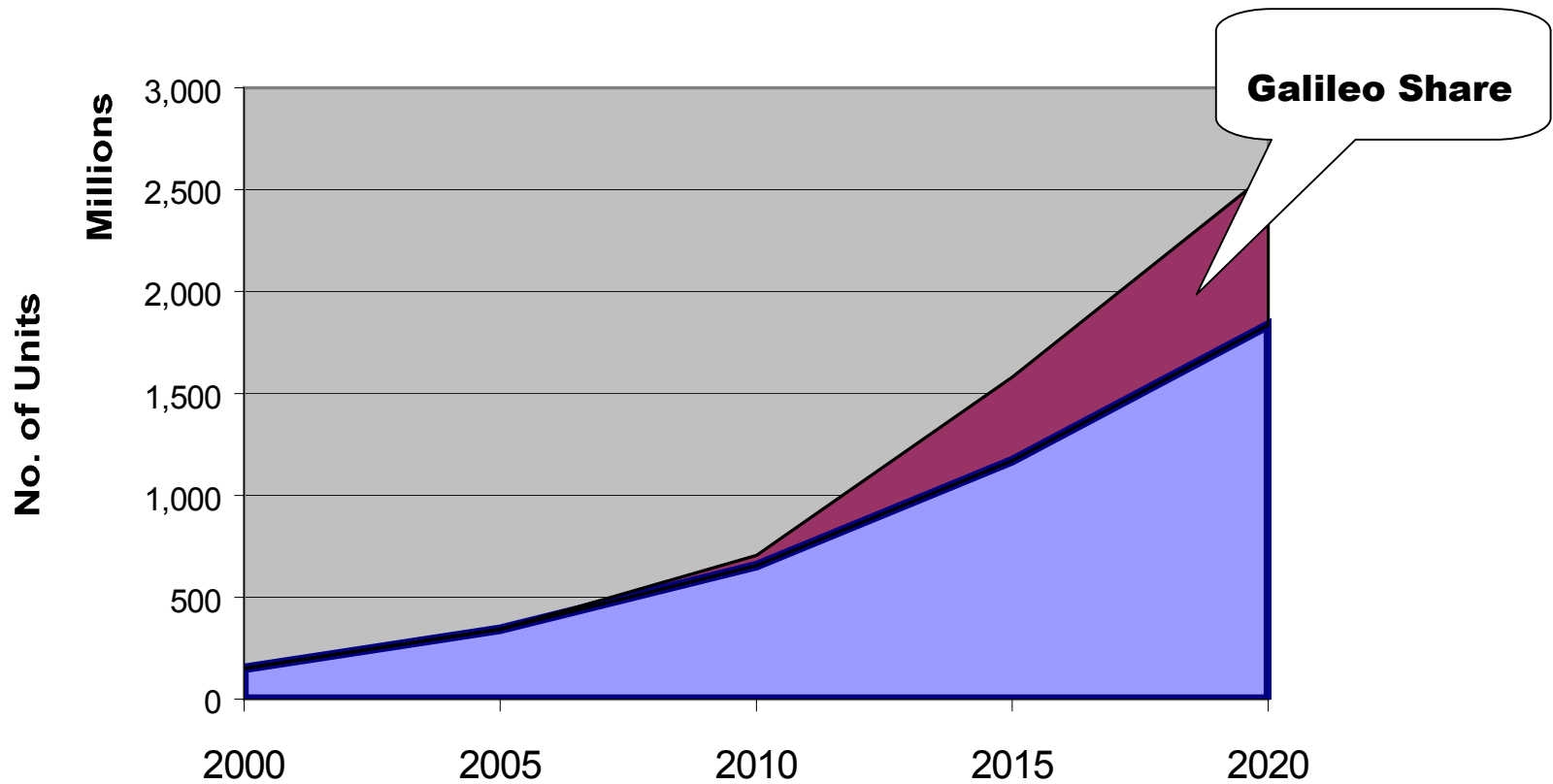


Revenues



**GALILEO IS A KEY ELEMENT TO CONSOLIDATE MARKET GROWTH
AFTER 2008**

GALILEO MARKET SHARE



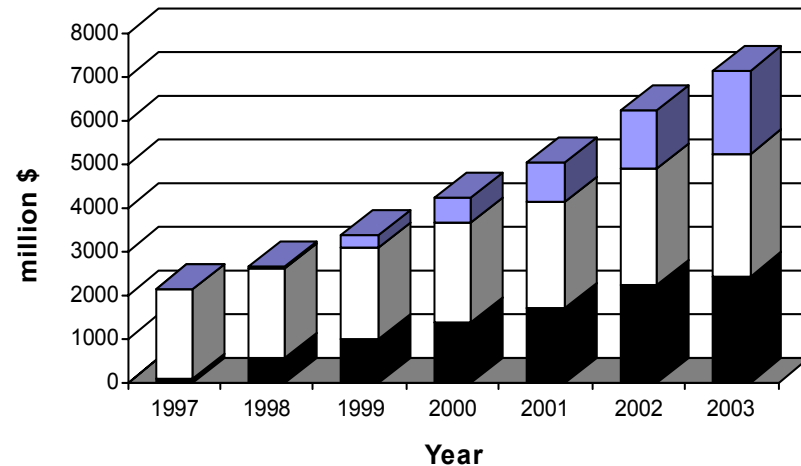
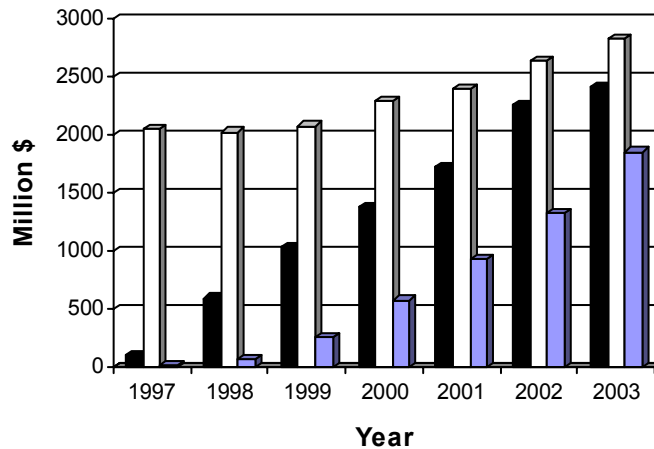
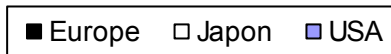
MARKET EXAMPLE: ROUTE GUIDANCE



Year	1997	1998	1999	2000	2001	2002	2003
Area							
Europe	50 000	380 000	800 000	1 200 000	1 730 000	2 300 000	2 560 000
Japon	1 050 000	1 300 000	1 600 000	2 000 000	2 400 000	2 700 000	3 000 000
USA	6 000	40 000	200 000	500 000	930 000	1 350 000	1 960 000

NUMBER OF UNIT

Source: FDC 98



EQUIPMENT MARKET

AERONAUTICAL DOMAIN :

- General Aviation
- Aeronautical Sports (Glider, Hot-air Balloon...)



MARITIME DOMAIN :

- Boating
- Water-based recreational Activities



TERRESTRIAL DOMAIN :

- Hiking
- Off-piste Skier
- Orientation Race
- Car and Motorcycle Rally
- Mushroom Picking



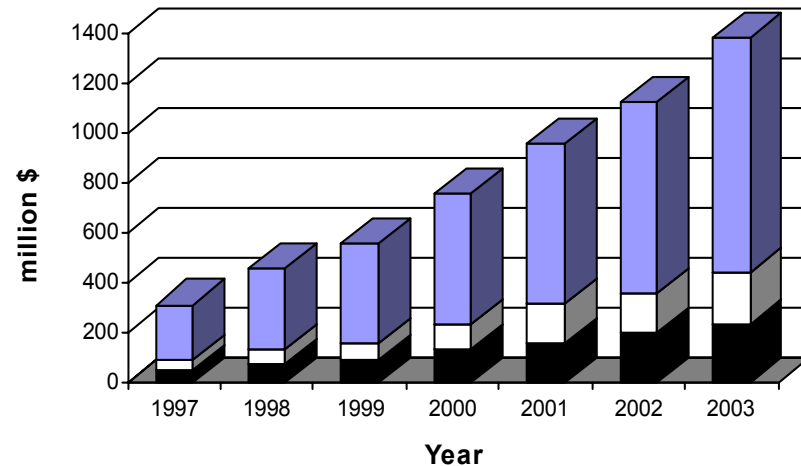
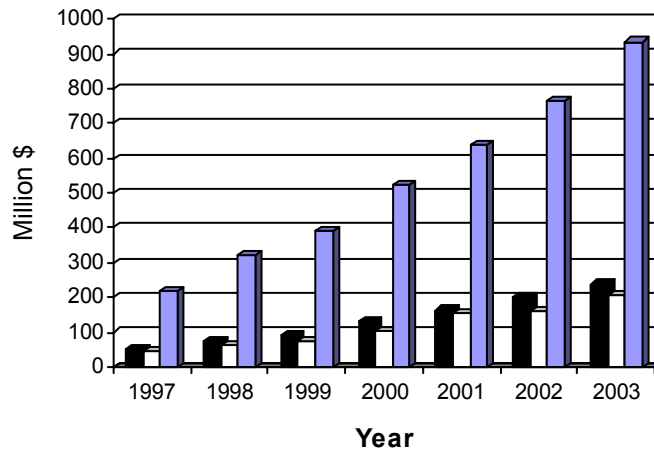
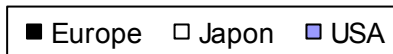
MARKET: LEISURE APPLICATIONS



Year	1997	1998	1999	2000	2001	2002	2003
Area							
Europe	205 000	328 000	440 000	660 000	860 000	1 100 000	1 400 000
Japon	180 000	270 000	340 000	505 000	805 000	1 050 000	1 220 000
USA	880 000	1 400 000	1 850 000	2 600 000	3 360 000	4 200 000	5 500 000

NUMBER OF UNIT

Source: FDC 98



EQUIPMENT MARKET

Galileo will increase the size of the equipment market and will create revenues from new services all over the world.

European industry could offer many assets to stimulate partnerships with industries from other Continents.

OREGIN offers a point of contact to the non-European industries which are looking for European Partners.

In particular, Galileo will generate new areas of co-operation, and will open the doors to mutual benefits.

NEEDS ARE GLOBAL

SYSTEMS CAPABILITIES ARE GLOBAL

MARKET IS GLOBAL

BENEFITS ARE GLOBAL

GLOBALISATION

IN FUTURE SATELLITE NAVIGATION

IS INESCAPABLE

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