

Opportunities for the Polish industry in the NAVISP program

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navisp – The Program

To leverage upcoming opportunities, European PNT industry will need to:

- ❑ Develop cutting-edge technologies & effective products & services
- ❑ Maintain & increase competitiveness of the manufacturing sector
- ❑ Support PNT national programmes and relevant institutional activities following ad hoc participant MS's request



- Improve industrial innovation + competitiveness at all industrial levels, and drive growth and jobs
- Support SMEs to break their way into (new) markets
- Flexibility for MS to target investments to support national objectives
- Uses best practice in terms of responsiveness and fast contracting procedures
- Open for non-space industry to capture the full spectrum of PNT innovation and commercialisation
- Programme fully coordinated with EU/EUSPA

navisp highlights to date

Close to 350 activities initiated

Presence across the whole value chain:

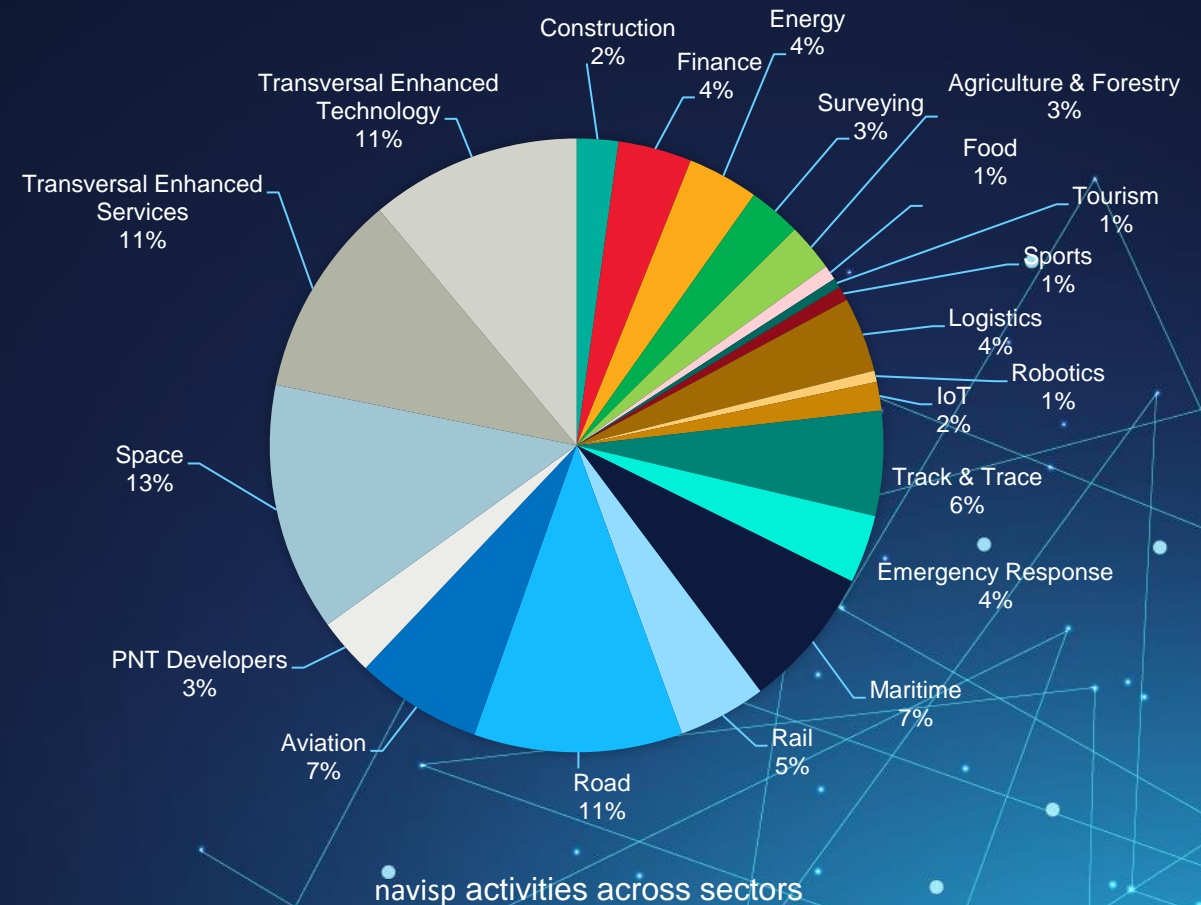
- Novel PNT concepts
- Upstream demonstration missions
- PNT-related downstream products & services
- Test-centres and demonstration infrastructure (National Policy Support)

Over 250 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



Partnership with market owners in key sectors:
IAEA, Grimaldi Group

Industrial co-funding into PNT:

- EL2 attracted ~ €50 m in co-funding from industry
- Over €20 m come from outside Space sector

navisp outreach:

- Navisp industry days – European PNT industry-centric event
- Presence in national events and top-rated downstream conferences
- 50+ final presentation webinars

NAVISP flagship projects:



EL1 - Technological Enablers of Cellular Networks for PVT Assurance

Under Evaluation – SoW requirements driven by IAEA

Aim: Proof of Concept demonstrating the capabilities of cellular network technologies for PVT assurance and encryption of ranging signals



EL2 - GSAB + GSAB2 - Grimaldi Satellite Assisted Berthing

Prime: Grimaldi Group (IT)

Aim: Assisted systems supporting berthing operations with big vessels as the PCTC – Pure Car & Truck Carriers, and berthing manoeuvres for a CON-RO Ship (overall length 250 m). Managed by a Grimaldi-led international consortium with Kongsberg (Norway) and Radiolabs(Italy)

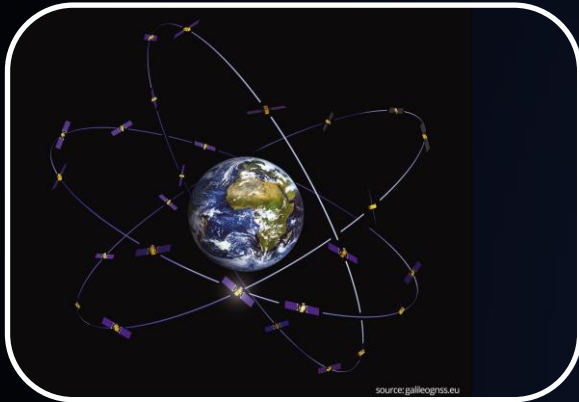


EL3 - ICING – Independent Critical Navigation

Prime: SpaceNorway (NO)

Aim: Demonstrate the capabilities of VDES over satellite to offer a purpose-designed ranging signal, serving as an independent source of PNT for maritime navigation. Consortium with Kongsberg (NO). Strategic national interest on Alternative PNT. **Phase 2 under preparation**

Some success stories



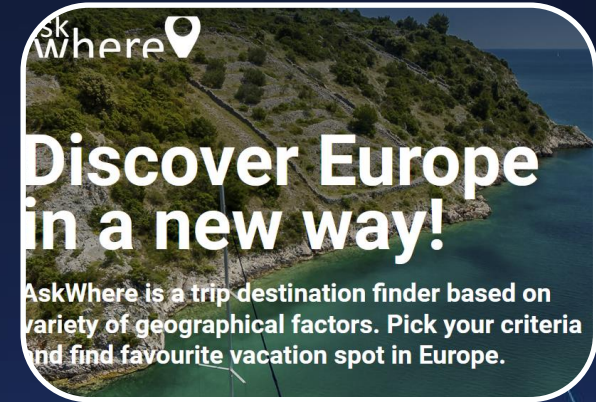
EL2-022 – GNSS software receiver for microlaunchers & microsattelites



EL2-080 - Geo Cardio: location of people with CIED devices



EL2-046 – “Help me in Distress” mobile app for saving lives and monitoring hazards



EL2-067- askWhere: Informational support for touristic destination and trip planning

Prototype tested on board MIURA-1 suborbital microlauncher recoverable vehicle in October 2023

System available commercially as part of Hertz's line of Personal GPS devices

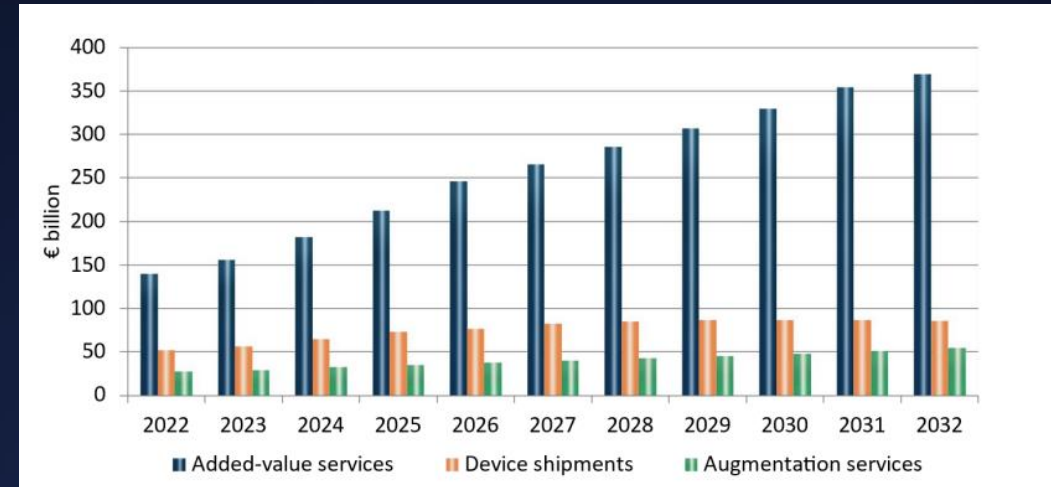
Together! Service and app available being used to organise volunteer help in support of Ukrainian citizens in Poland

Service online on beta version prior to commercial launch

Why navisp phase 4?

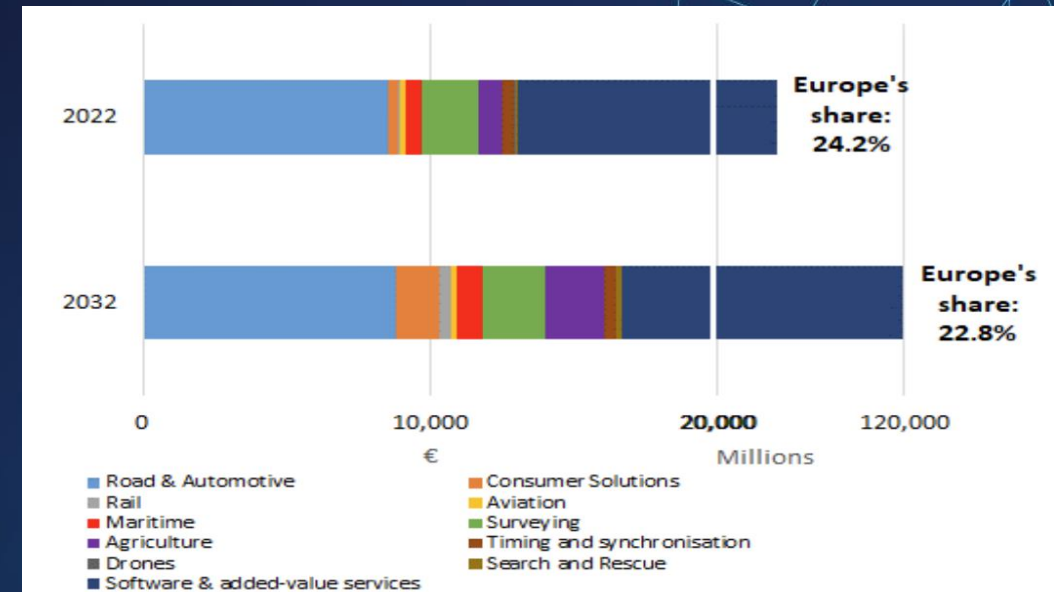
PNT market will continue to grow over the next decade:

- Downstream revenues reaching € 510 bn by 2032 (EUSPA).
- European industry will grow, losing market share w.r.t. APAC and US:
 - For consumer solutions (65 – 70 % of revenues), share will remain small
 - For non-consumer solutions (30 – 35 % of revenues), European industry well-positioned but facing strong and ever-increasing competition



In this context, navisp is an 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



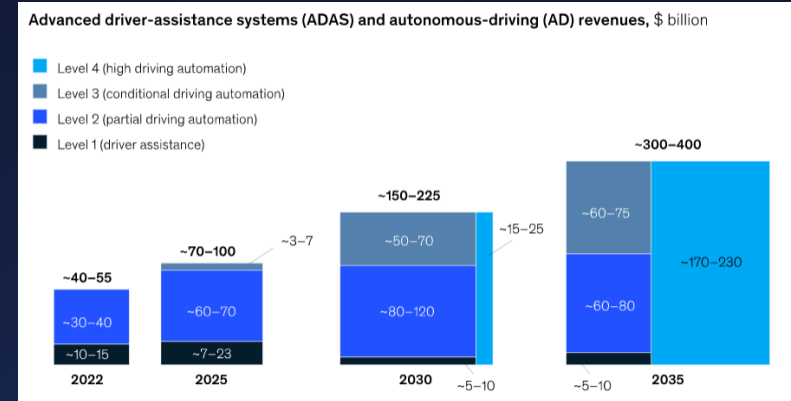
Increasing weight of market owners

Market owners are the downstream markets gate keepers:

- PNT added-value recognition
- Perceiving risks on how to capitalise opportunities
- Willingness to co-invest alongside navisp in long-term partnership
- Programme speed not always aligned with business priorities

navisp engaging with an increasing number of market owners; sectors include:

- ADAS
- Indoor navigation
- Timing



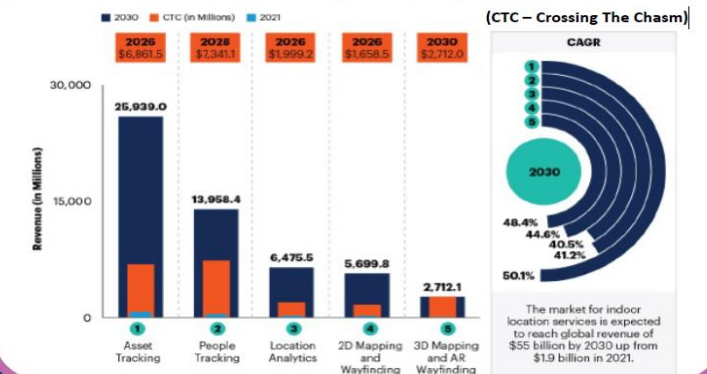
Source McKinsey

Source Gartner

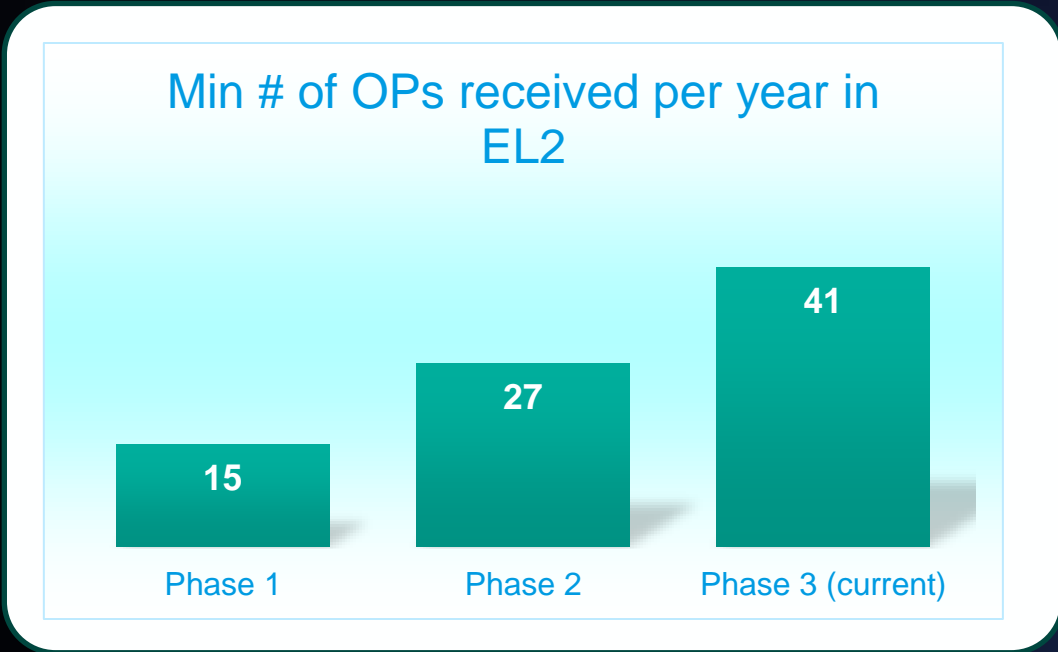
Global Location Services Market

1.9B\$ 2021 x > 25 55 B\$ 2030

Indoor Location Services Revenue Opportunity Projection



Growing appetite – increasing industrial interest



navisp phase 3 subscription May 2024: €123.4 M (2024 e.c.)

- Increased subscription after CMIN-22 from UK, PL and DE (under process)
- ... and inflation

navisp commitments:

- Phase 1: 87 %, closing in 2024
- Phase 2: 81 %
- Phase 3: 16 %

Activity pipeline exhausting IT, UK, IE, CA Element 2 subscriptions

navisp Poland financial status summary



- Phase 1 (EL2) → 92% is committed
- Phase 2 (EL2) → 98% is committed
- Phase 3 (EL1 - EL2 - EL3) : 11% is committed; 6% of funds are engaged for new EL3 activity for which Full Proposal has been requested

Element	Contribution for Industrial Activities 2024 e.c. (€)	Funds Committed 2024 e.c. (€)	Activities to be negotiated 2024 e.c. (€)	Pending support by Delegation 2024 e.c. (€)	Remaining funds 2024 e.c. (€) <i>Considering Pending Support by Delegation</i>
Element 1	930,187	-	-	-	930,187
Element 2	5,694,074	3,214,454	-	-	2,479,620
Element 3	930,058	-	305,000	-	625,058
Total remaining					4,034,865



- navisp phase 4 asking for an increased budget to deliver on its mission:
 - PNT is a growing opportunity for European & Canadian Industry
 - Significant risks to tackle: PNT extension, strong competition from other regions, upcoming national policies.
- navisp phase 4 should be more agile and responsive to industry needs while remaining good value-for-money to Participant States:
 - Phase 4 shall drive procurement process and contract simplification
 - Operational costs shall remain at current levels (15 %)



Thank you!



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