

# navisp Industry Days 2025

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→ THE EUROPEAN SPACE AGENCY



# SATNAV: A strategic sector – Europe Leading the Way



Satellite navigation is the largest downstream space market



50 000 jobs in European GNSS downstream market



Europe as a strong international partner



4+ billion Galileo users worldwide / EGNOS fully integrated in aviation



Strategic enabler for European autonomy and resilience (Dual Use)



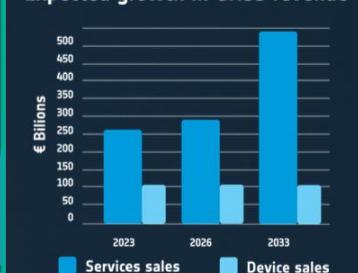
Supporting European competitiveness in a strategic sector



Expected cumulative GNSS revenue 2023-2033<sup>5</sup>



Expected growth in GNSS revenue<sup>6</sup>



Positioning, navigation and timing is everywhere around us.  
Already 10% of EU's GDP relies on satnav systems and its set to grow.



# NAVIGATION

SHAPING THE FUTURE OF PNT

**LEO PNT  
Industrialisation  
& In-Orbit  
Validation**

**LEO-PNT  
Industrialisation & IOV**

**OPSTAR**

**Optical PNT In-orbit  
Demonstrator**  
  
(cm and psec  
accuracy)

**Fostering  
PNT Innovation &  
industrial  
competitiveness**

**NAVISP  
Phase 4**

**NOVAMOON**

**Lunar Surface  
Differential PNT**  
  
**Moonlight  
Augmentation**

**Delivering  
High Accuracy  
Terrestrial Reference  
Frame**

**GENESIS**

**PNT Incubator**

**Disrupting PNT  
System & Technology  
Demonstrators  
preparation**

# NAVISP: a programme with high impacts

240 M€ ESA  
54 M€ cofund  
350 projects  
300 E.O.

1 M€ NAVISP  
results in  
1.8 M€ in  
GDP

> 90%  
commercial  
success in  
EL2

70% of  
commercial  
revenue from  
exports

> 55 % ROI  
over  
10 years

> 1300 jobs  
sustained  
35% new  
> 370 student

