

| January 2023

EUSPA

Visual Identity Guideline



#EUSpace 



#EUSpace 

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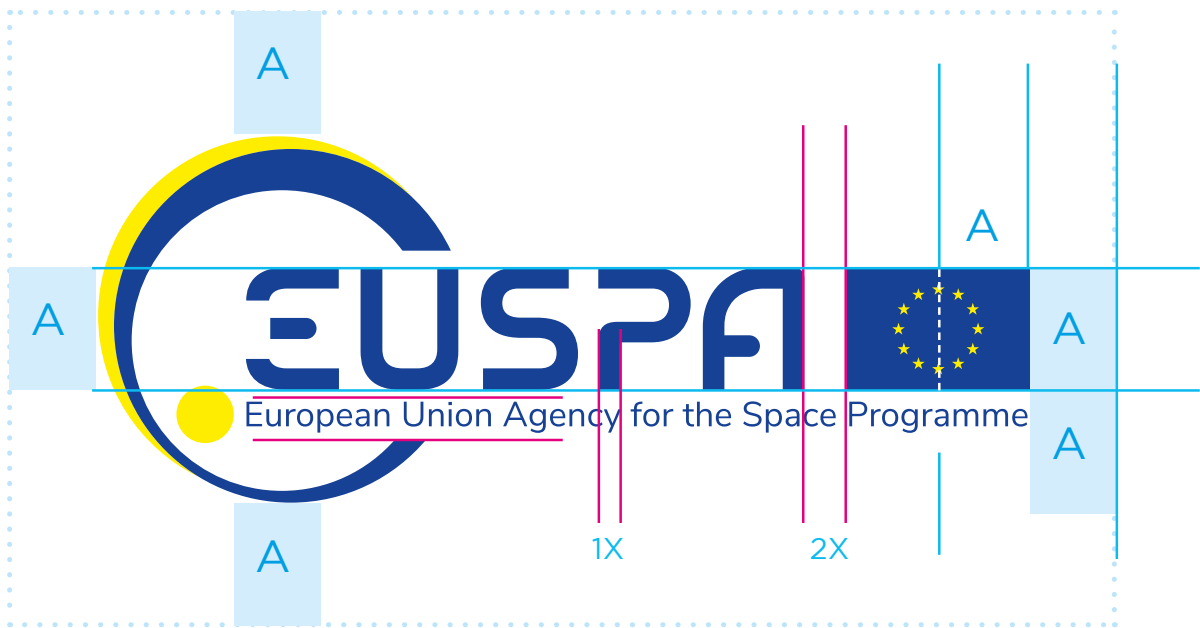
1 | LOGO

A | The Concept



- 1) The acronym uses a unique font exclusive to EUSPA, inspired by modern fonts related to technology and space. EUSPA is innovation.
- 2) The EU flag is part of the logo, underlining the European nature of the institution. The colours of the logo correspond to the colours of the EU flag. EUSPA is European.
- 3) The colours of the new design have been adapted to harmonize with the logos of the other European institutions.
- 4) The acronym is preceded by circular shapes of different sizes that reference our planet, sunrise, orbits, movement, perspective, etc. EUSPA is dynamic.
- 5) The logo is configured as a solid horizontal bloc that denotes strength and lightness. EUSPA is reliable.



B | LOGO composition and colours

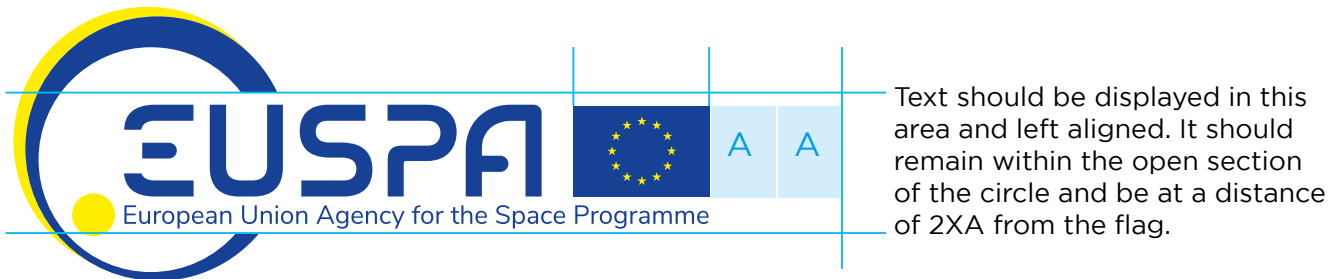


The dotted line refers to the protection area where no text can be displayed.

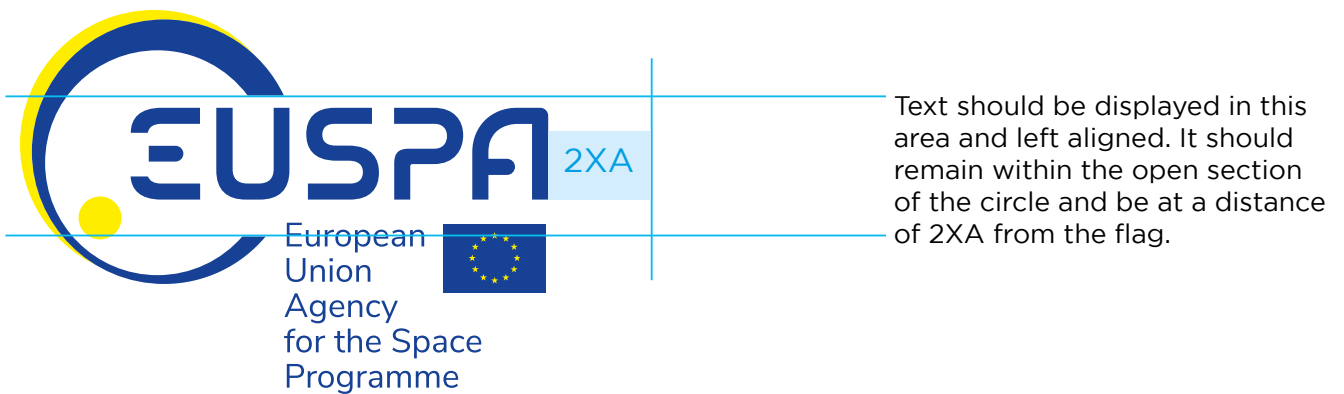
	C	M	Y	B	PMS	R	G	B	hexadecimal
	100	80	0	0	Reflex Blue	0	58	148	#004494
	0	0	100	0	Yellow	255	237	0	#FFF100

If you want to add text on the right-hand side of the logo it should follow this rule:

THE HORIZONTAL VERSION



THE VERTICAL VERSION



c | Versions

The logo should be displayed preferably on a monochrome background.

BASIC VERSION
Full colour positive

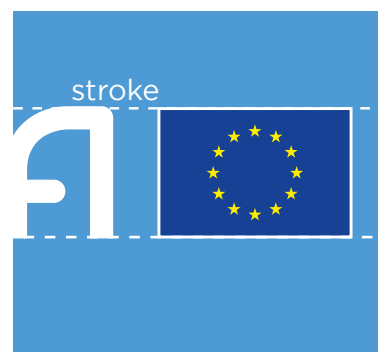


Nunito Sans Regular

BASIC VERSION
Full colour negative



Note that the stroke is inside the rectangle!



This monochrome version can be displayed either in

- Black
 - Reflex Blue
 - Cool Grey
- on a light background

BASIC VERSION

Monochrome positive



BASIC VERSION

Monochrome negative



THE VERTICAL VERSION

A more square version is available to be displayed on spaces that favor square or vertical representations of images.

This version has been created to meet specific architectures, web, etc.



Nunito Sans Regular

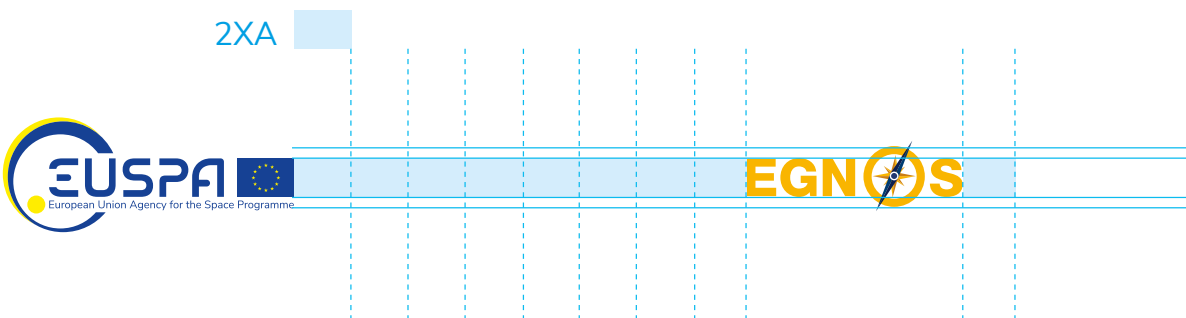


CO-EDITION

When publishing a co-edition, other logos may need to be displayed next to the EUSPA logo. If this is the case, the EUSPA logo keeps its original position to remain compliant with the graphical style guide. The logos to be added will be aligned and vertically centred with the EUSPA logo.



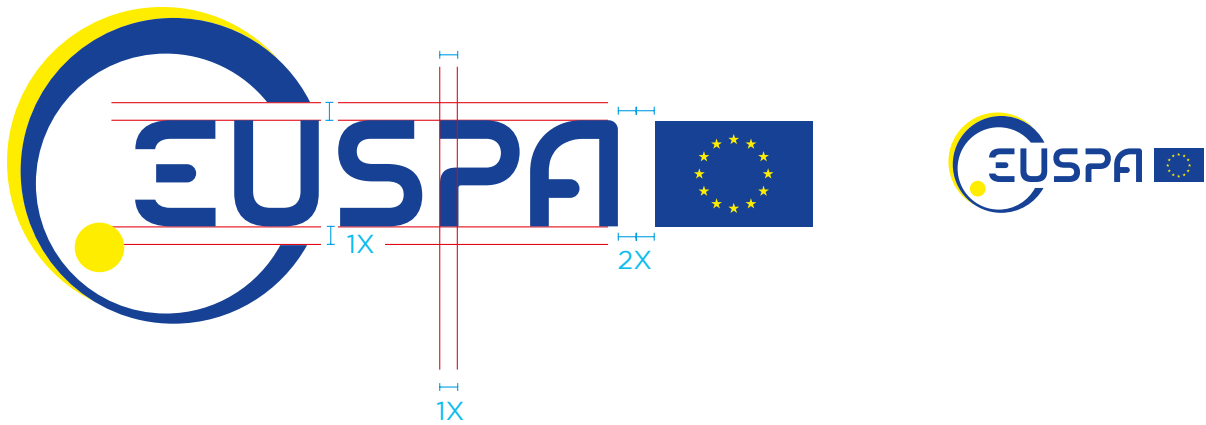
When the logos are not placed one next to the other, the distance between them should be a multiple of 2XA.



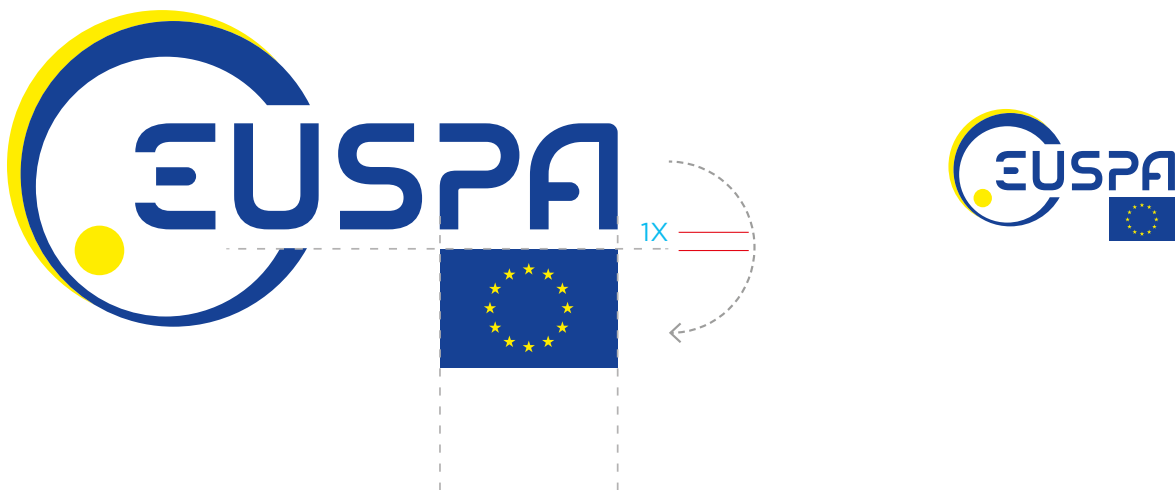
When the logos are displayed vertically, they align in the center. The distance between them should be at least as long as the height of EUSPA's circle.



WITHOUT TAGLINE
Horizontal



WITHOUT TAGLINE
Vertical



D | Don'ts

Don't change the colours.



Don't change the flag's position.



Don't write text in the protection area.

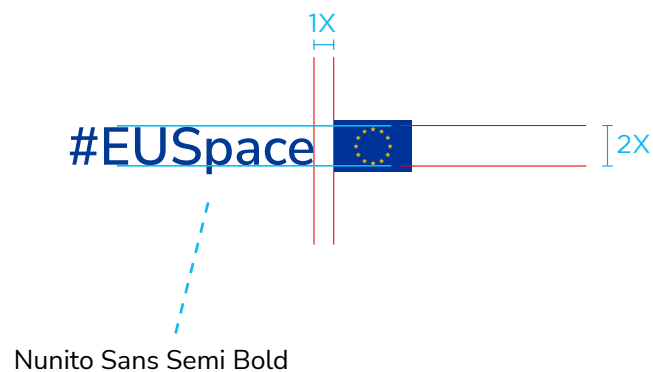


Don't change the flag size.

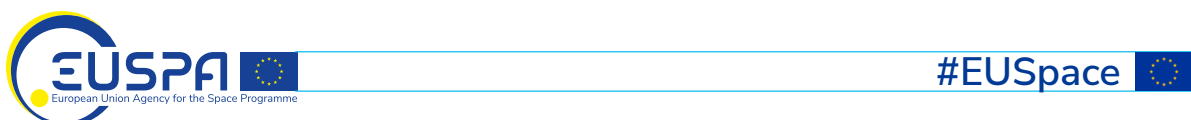
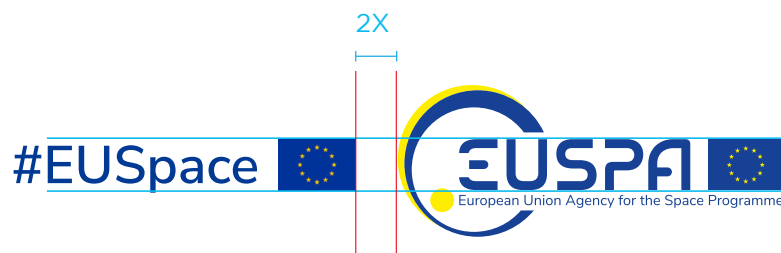


2 | #EUSpace & EU FLAG

The #EUSpace hashtag and EU flag appears together with EUSPA logo on digital content as well as printed production, and is in principle part of the EUSPA visual identity.



Versions of #EUSpace and EU flag together with EUSPA logo:



Below are the different colour versions.

Full colour versions

#EUSpace 

#EUSpace 

Monochrome versions

#EUSpace 

#EUSpace 

Below are couple of examples of how EUSPA logo, #EUSpace hashtag and EU flag are shown together on different digital and printed deliverables and audiovisual content.

Video:



Social Media visual:

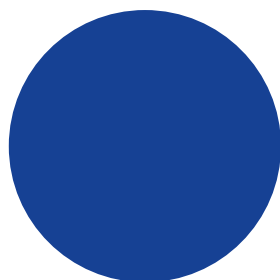


Brochure:



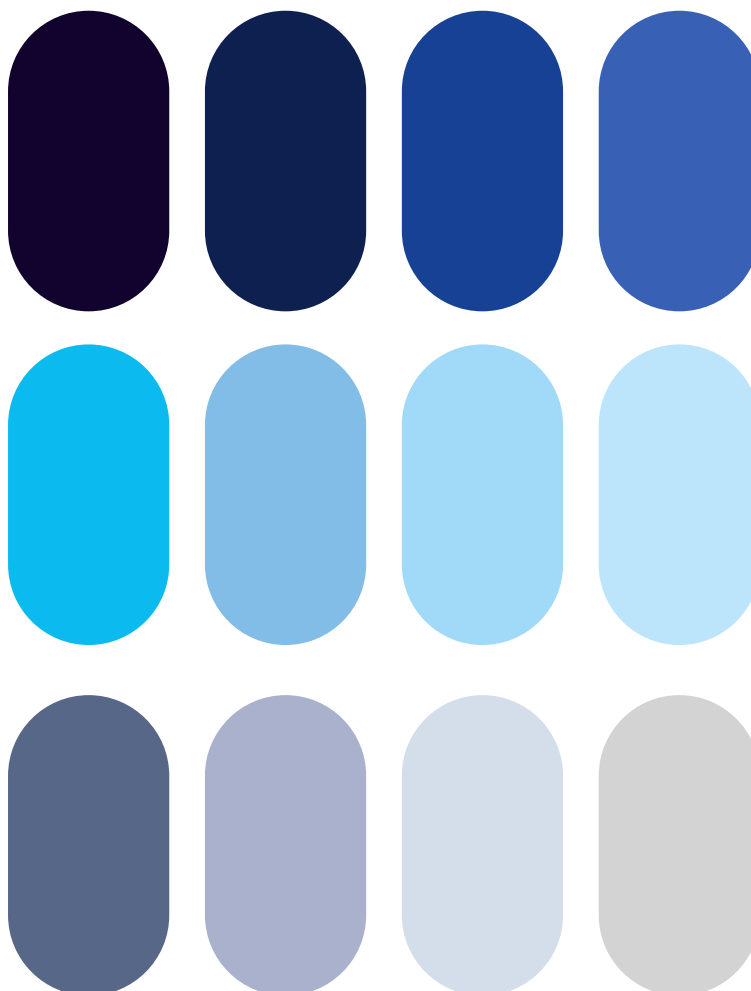
3 | COLOURS

The EUSPA visual Identity uses variations of the main colours of the European Union. On the next page we present some variations of the blue to choose from, depending on the purpose of the design.

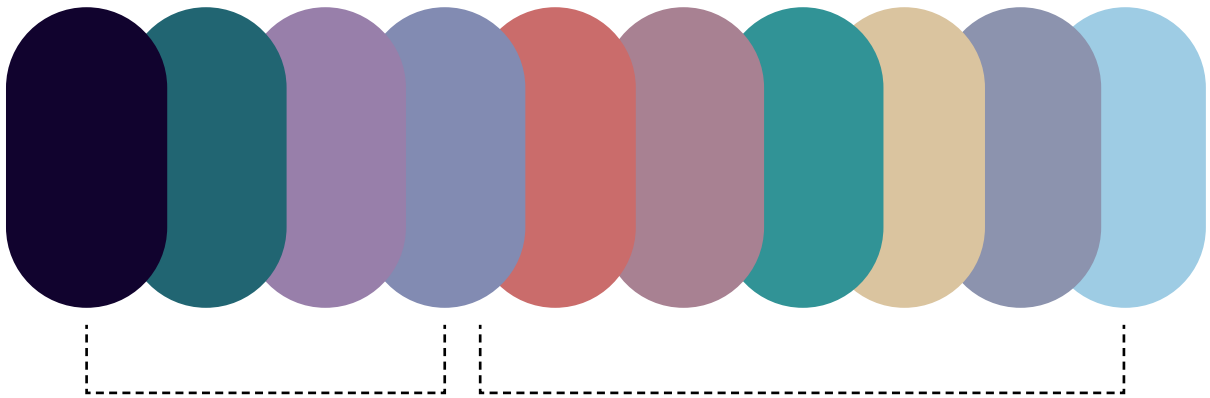


EU BLUE

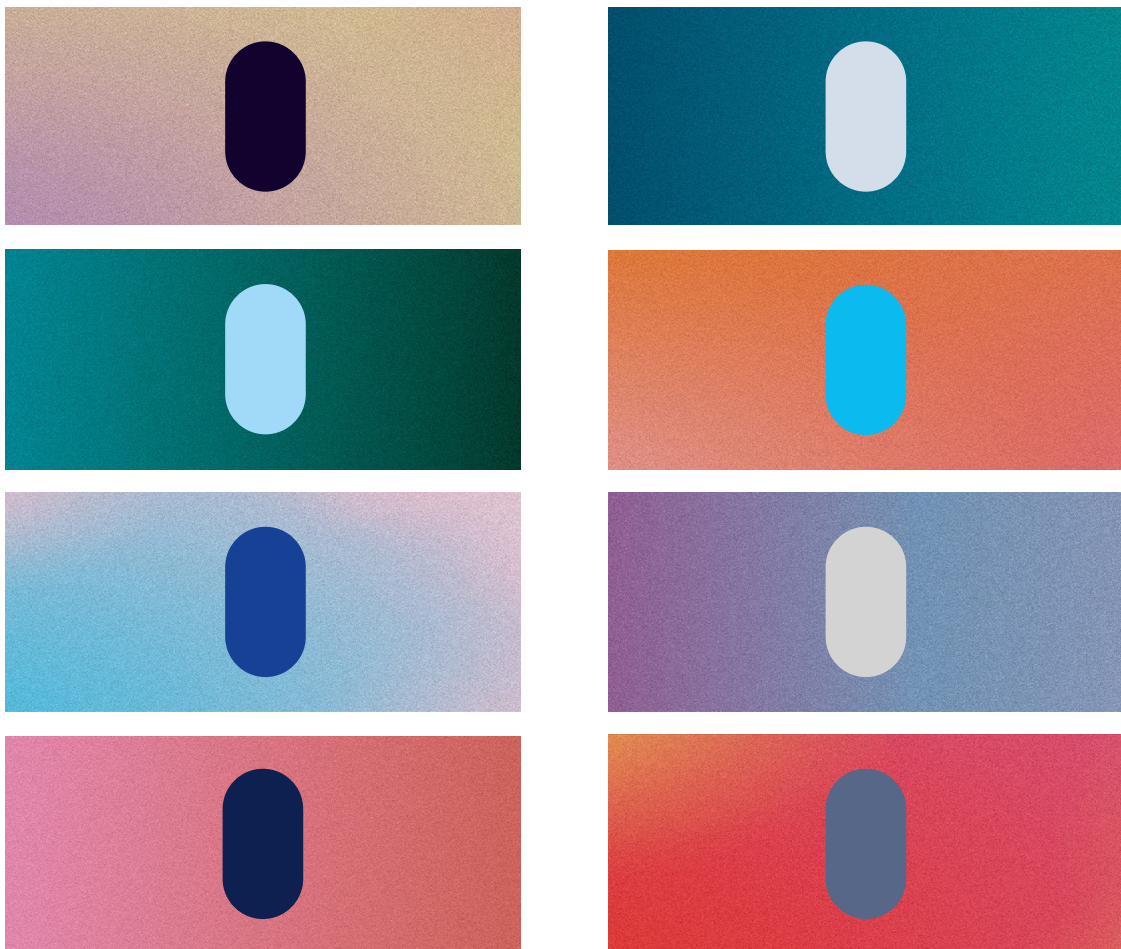
EU BLUE



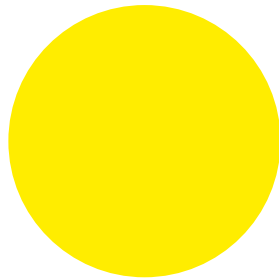
An additional set of colours that will harmonise with the blue, but that can also work well on their own.



Examples of gradients and shadings to give some dynamism to the design combined with the blues.

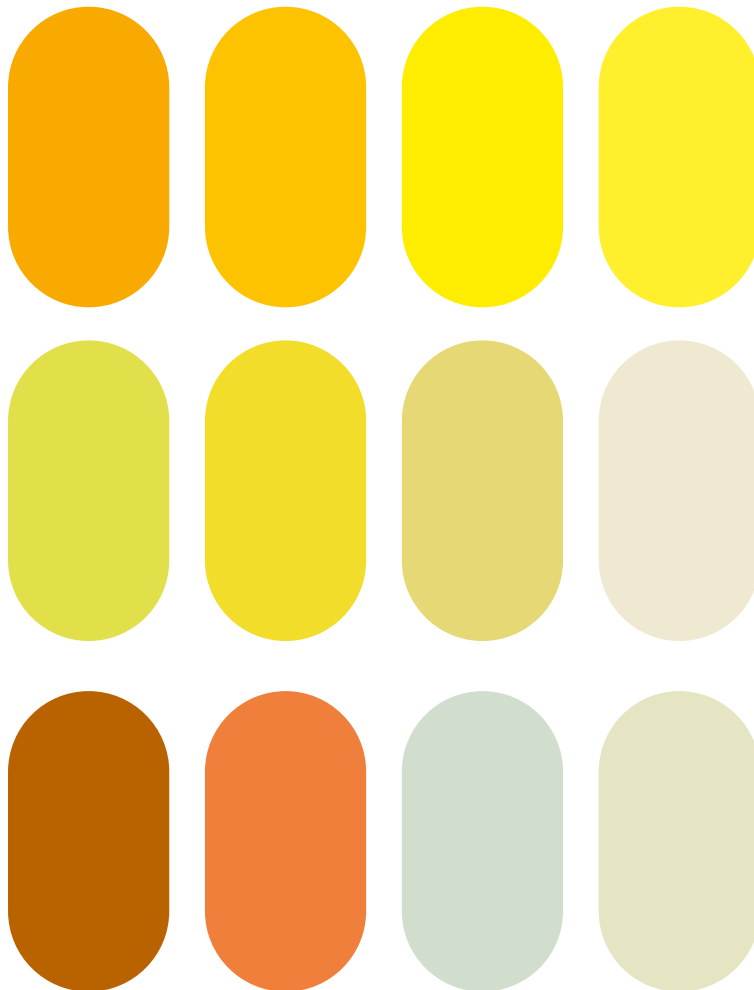


The EUSPA visual Identity uses variations of the main colours of the European Union. On the next page we present some variations of the yellow to choose from, depending on the purpose of the design.

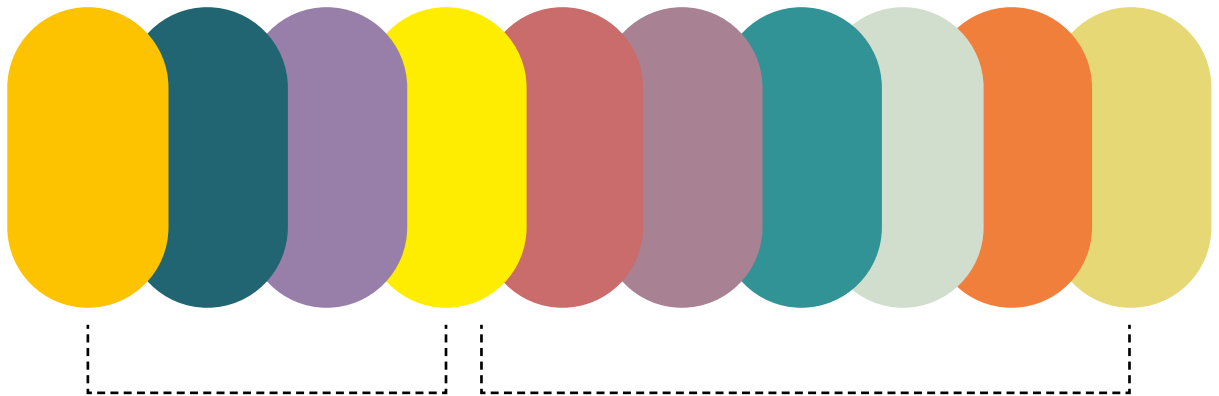


EU Yellow

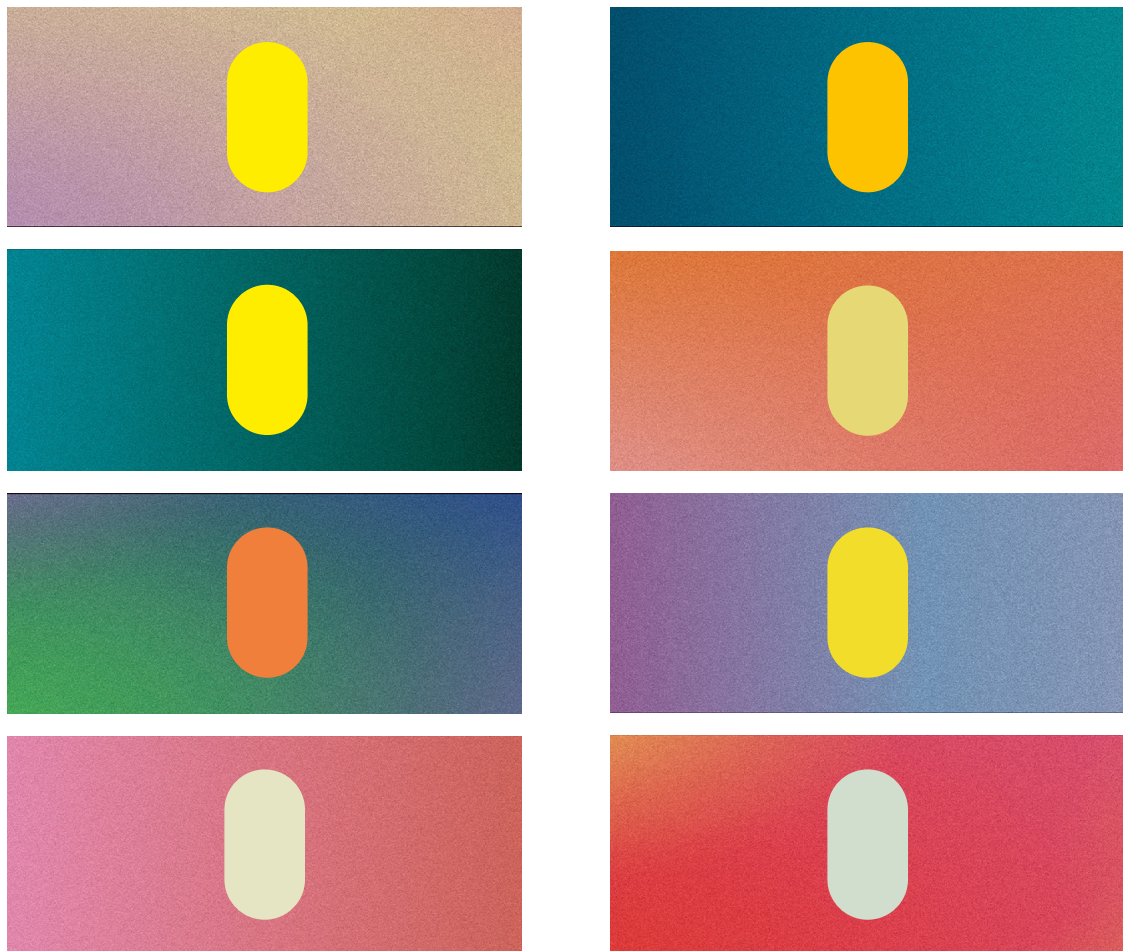
EU Yellow



An additional set of colours that will harmonise with the yellow, but that can also work well on their own.



Examples of gradients and shadings to give some dynamism to the design combined with the yellows.



4 | TYPOGRAPHY

Ⓐ | For publications and web

EUSPA uses a combination of two Google fonts that reference slightly the font of the logo:

EXO Semi-bold 600 and extra-bold 800

Semi-bold 600

European Union Agency for the Space Program

Extra-bold 800

European Union Agency for the Space Program

and

Nunito Sans

Regular family

ExtraLight

European Union Agency for the Space Program

ExtraLight Italic

European Union Agency for the Space Program

Light

European Union Agency for the Space Program

Light Italic

European Union Agency for the Space Program

Regular

European Union Agency for the Space Program

Regular Italic

European Union Agency for the Space Program

Semibold

European Union Agency for the Space Program

EXO

EXO

Nunito Sans

exo

Nunito Sans

Nunito

EXO semi-bold 600 for title

Num reperferiae et qui con rat est vel et lignis atur?

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Nunito Sans Regular

B | For office documents

For documents created using Office programmes, e.g. Word, PowerPoint, Excel the font to be used is Calibri.

Light

European Union Agency for the Space Programme

Regular

European Union Agency for the Space Programme

Italic

European Union Agency for the Space Programme

Bold

European Union Agency for the Space Programme

Bold italic

European Union Agency for the Space Programme

Calibri Bold

Num reperferiae et qui con rat est vel et lignis atur?

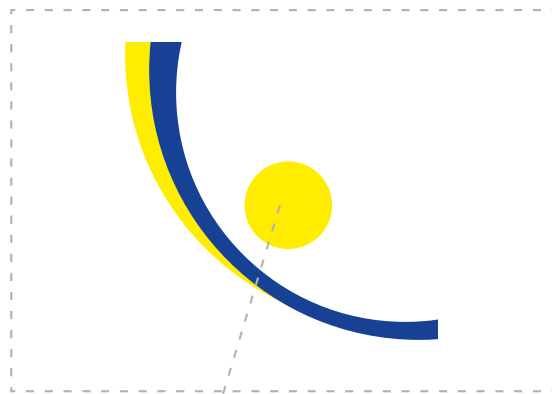
Ditaquam, volut ulpa que voluptus ipsa parupta sundica borepratem aut eum fugitius de del invenis volupta testior porporest is esterioria ius, inusdam undem conest, quam qui volorit omnis doluptatibus rest ut harchil loreprecae consequi nus, tem inimaxima ius, aci sequiaeperia sit ut mo culpa voluptat autet aris am, inciendendis dit oditiisciis. Da sitaeprovid que is volut et ut ut volestrum es intiis sae vendit harchil igenimi, isque pelis derroreri reperati temporporere quam vere, temquaecto vel ipsum que conet aut ut acceptat emquodi tatquibus aut doluptate il ero exceari volorer naturis magnis dolorum quam, verum similias ero ius ellatis et atiis qui alibus.

Ignatus magnietur, inus, offic to eat quias duntorem quas eos illabore net ma volor sa di tem. Ita voluptiorem endi dus endiorerunt assus, sam re esed eaquam, simpors i corerep udandisquam veliand aepedigentem fugit exceari et aliaerepra voluptatur maos eamem prehenis solorem olente de pre nonsequi nulliatium il ipiscit rem qui non

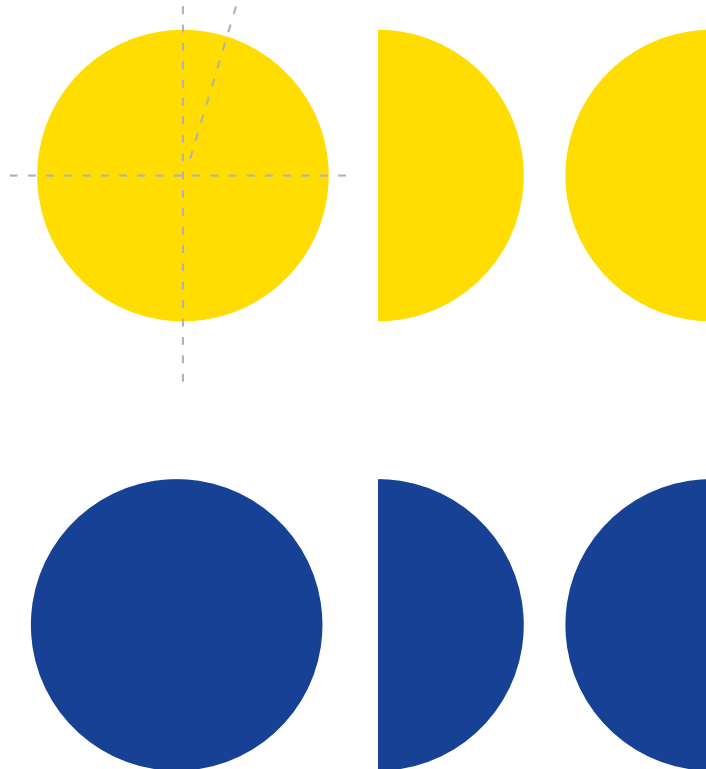
Calibri Regular

5 | KEY GRAPHIC ELEMENT

To make EUSPA stand out more, it is suggested to use a key graphic element to accompany the logo and give a new dimension to the main identity.



The yellow circle contained in the logo, used in its entirety or split in half, is the graphical key element, providing tools to designers to be creative and original in their compositions.





6 | PUBLICATIONS

Use of the key graphic element on publications.



Use of the key graphic element on publications.



Inside pages of publications.

4
EUROPEAN GNSS DOWNSTREAM RESEARCH & INNOVATION, PRIORITIES AND CONSULTATION RESULTS
5




Current situation

The European space economy (upstream, mid-stream and downstream) is estimated to employ over 230,000 professionals generating a value of EUR 46-54 billion or 21% of the global value of the sector. The downstream sector is, in particular, a sector where new jobs are created thanks to the increasing volumes of satellite data available for exploitation by innovative applications. Today, the GNSS market represents more than 50,000 jobs in the European downstream market. Also, it is estimated that currently over 10% of European GDP is enabled by economic activities linked to the need for location through satellite navigation systems, including European GNSS (Galileo and EGNOS). This number will continue to grow, i.e. global GNSS downstream market revenues from both devices and services will grow from EUR 150 bln in 2019 to EUR 325 bln in 2029 with a CAGR of 8%¹.

The GNSS downstream sector primarily relates to GNSS applications, receivers and devices that are using the data provided by space infrastructure. Today GNSS is used in a variety of industries, ranging from transport and precision agriculture to simple car navigation.

The European space infrastructures are built and operational. The EU has achieved a great success by ensuring the continuity of space services based on these infrastructures, working every day with users and companies, contributing to create a dynamic downstream sector that now needs to grow and succeed internationally. The European GNSS downstream market generated more than EUR 38 bln revenues in 2019. The United States continues to lead the global GNSS market (at 28% of total industry revenues), however Europe is closing the gap with the United States, accounting for 27% of total industry revenues (compared to 25% in 2015)².

As revealed by users during the User Consultation Platform 2017 and the User Consultation Platform 2018, in order to make the space sector competitive, R&D investment should be substantially focused on the downstream domain, increasing the use of space signals and data, leveraging the differentiators of the EU Space Programmes with the aim of improving the worldwide market share of EU downstream industry and SMEs.

Opportunities ahead

The Space Strategy for Europe³ recognized that "investments in downstream space developments are necessary to demonstrate the important role of space by achieving the key objectives of EU policies". Horizon Europe should foster the market uptake of the EU space programmes (e.g. EGNOS and Galileo) through boosting demand among public and private users, facilitating access to and use of space services, and stimulating the development and use of innovative downstream applications.

As described above, the current European EGNSS market share is 27%, while the usual European market share in other high-tech sectors reaches 33%. Europe's objective is to increase the EGNSS market share to 30% by 2025. In order to do that, there is a strong need for institutional support to provide the European GNSS downstream industry with the means to become even more competitive in the global market, as due to both high market and technology risks, market forces alone will not cover the whole spectrum of possibilities offered and opportunities will be lost. Between 2014 and 2020 the EU has invested around EUR 8 bln in EGNSS infrastructure, while investments in the development of value-added applications and services, receivers and market uptake reached around EUR 300 million (Horizon Europe and Fundamental Elements).

New needs after 2020

After 2020, when the Galileo system is fully operational and the new version of EGNOS will start to be deployed, the primary goal will be to establish European GNSS as the leader in those markets and sectors that best exploit the unique differentiators of the systems.

This was also the conclusion of the European Commission interim report on the implementation of the Galileo and EGNOS programmes and on the performance of the GSA. "The stakeholder consultation identified a need, for the next phase of the Galileo programme, to shift



- Complete market uptake in longer term regulated market segments (e.g. Galileo for rail, aviation, autonomous cars)
- Position Galileo as a leader in segments where its unique features/differentiators make a difference
- Support the Public Sector as a customer of Galileo
- Foster competitiveness of EU downstream industry and SMEs/start-ups and leverage regional competences

From the downstream industry and SME perspective, the European Commission and the GSA contributed to creating and maintaining the GNSS downstream sector in Europe. After 2020, when the GNSS community will count on the full availability of the Galileo differentiators, a further effort will be required to translate these differentiators into enhanced competitiveness.

¹Socio-economic impacts from Space activities in the EU in 2015 and beyond, PWC study, 2016.
²Analysis of GNSS impact on the EU Economy, November 2016.
³GSA GNSS Market Report 2019, Issue 6
⁴GSA GNSS Market Report 2019, Issue 6
⁵See Article 172 of the EGNOS Regulation (EU) No. 1285/2013

¹COM(2014) 705 final
²SWD(2017) 346 final, Commission Staff Working Document Interim Evaluation of Galileo and EGNOS programmes and evaluation of the European GNSS Agency accompanying the document. Report from the Commission to the European Parliament and the Council on the implementation of the Galileo and EGNOS programmes and on the performance of the European GNSS Agency

6
EUROPEAN GNSS DOWNSTREAM RESEARCH & INNOVATION, PRIORITIES AND CONSULTATION RESULTS




EGNSS downstream in Horizon Europe and Space Regulation -

1. Grants and Fundamental Elements to complete market uptake and position Galileo as a leader

Downstream R&D activities should continue their focus on the development of close-to-market EGNSS applications in the areas of transport, mass market applications and professional applications, thereby increasing knowledge and cross-border cooperation in these areas, and delivering on EU strategic challenges such as climate change, digitalisation, environmental protection, etc. Particular attention should be given to new market trends such as unmanned automated and connected vehicles, Internet of Things, Artificial Intelligence, robotics, etc., thus accelerating industrial transformation. The R&D priorities should therefore include solutions that support the circular economy, leveraging GNSS to limit the environmental impact of transport and support precision agriculture.

At the same time, Horizon Europe should devote a significant part of the investments to completing the downstream EGNSS adoption in the longer-term regulated market segments e.g. through the realisation of large implementation projects.

In both of these areas, a special focus should also be placed on the uptake of new EGNSS services/differentiators, such as the High Accuracy Service, Galileo Authentication features and the Search and Rescue Return Link, thereby spreading and connecting excellence across Europe.

This is also an area where the Fundamental Elements Programme is needed in order to accelerate the uptake of EGNSS differentiators by end users, by anticipating receiver capabilities supporting these differentiators. This will be essential for when the differentiators will emerge from the testing and validation phases to full service provision in order to ensure market readiness across all segments. Taking into account that the further evolution of the Galileo and EGNOS systems will also require the development of fundamental elements such as commercial chipsets, receivers and antennas in Europe, Horizon Europe should support these developments and open the way for new and innovative missions, concepts, services and applications. Furthermore, synergies with other technologies, e.g. COPERNICUS and SG, should be sought through EGNSS innovations.

2. Awareness RAISING/ Capacity Building and International Cooperation to increase the downstream competitiveness in international markets

The R&D funds should provide support to awareness raising and capacity building initiatives in the field of EGNSS, which is an essential element in facilitating the breakthrough of EGNOS and Galileo inside and outside Europe, thereby strengthening international R&D cooperation in this area. International cooperation actions shall focus on supporting the establishment of new EGNSS/space downstream opportunities for European industries and SMEs/start-ups through participation in global value chains and access to new and emerging markets.

3. Downstream applications involving several components of the Space Programme

Space technologies, data and services have become indispensable in the daily lives of European citizens. Space-based downstream solutions are providing a huge impact and benefits in areas like energy, food, health, maritime surveillance, security, water management, and transport. On top of the development of applications focused on a single space programme, there is an opportunity to create applications across all space components that will facilitate synergies between space solutions and further push market adoption, while ensuring a return on investment.

Horizon Europe should support the development of close to market integrated space based downstream applications that focus on synergies between space systems/technologies, e.g. EGNSS and Copernicus. The solutions should be user-driven and focus on the following areas:

- Transport
- Agriculture and Forestry
- Ocean Monitoring
- Urban Planning and Geomatics
- Critical Infrastructures
- Environment and air quality
- Natural Disasters and Emergency Response
- Insurance and Finance
- Governmental and Security

Activities within this action should focus on the development of close-to-market solutions (TRL7) exploiting at least two space systems/technologies. The funding should be split into two stages: the first stage should cover the technological development of solutions and preliminary tests, the second stage funding should be dedicated to




EUSPA EO and GNSS Market Report and Market Segment Icons.



HOW TO READ

How to read this report

The European Union Agency for the Space Programme (EUSPA) and the European Commission (EC) welcome all readers to this first issue of the EUSPA EO and GNSS Market Report. Following two previous issues of the Copernicus Market Report by the EC and our previous issues of the EUSPA EO and GNSS Market Report, this EO and GNSS Market Report combines the market and application insights of both in a single report that provides global coverage of the Earth Observation and Global Navigation Satellite System applications across multiple market segments.

For a similar structure and format used in previous issues, with the merger of both EO and GNSS into a single report, no less than 37 market segments are featured.

The 17 market segments are the following: **Agriculture / Aviation and Drones / Biodiversity, Ecosystems and Natural Capital / Climate Services / Consumer Solutions, Transport and Health / Emergency Management and Infrastructure Aid / Energy and Power Markets / Environmental Monitoring / Fisheries and Aquaculture / Forestry / Administrative / Insurance and Finance / Maritime and Island Waterways / Rail / Road and Automotive / Space / Urban Development and Cultural Heritage.**

The report is structured as follows:

- **General overview of the EO and GNSS market** presents an overview of the downstream space application market, main EO and GNSS trends, market size and revenues of both EO and GNSS as well as segments and installed base in the case of GNSS. It further presents a global industry overview and main trends, as well as a general description of what Copernicus and EUSPA encompasses. Finally, segments from EO and GNSS play a role across general policy and market trends.
- **The market segments** from the core of the report. All segments, regardless of length, follow the same structure:
 - To introduce the segment, an overview of the EO and GNSS applications is presented alongside a segment description.
 - Key market segment trends are illustrated with examples.
 - User perspective focuses on user needs and the utilization of EO and GNSS in the segment from the users' point of view.
 - The industry value chain(s) provide a non-exhaustive list of key stakeholders.
 - Recent developments focus on historical data of shipments of GNSS devices and EO data and service revenues by application or region over the past decade, presenting initiatives and examples that have recently been implemented.
 - Future market evolution forecasts GNSS shipments or EO revenues over the next decade spanning 2022 to 2031. It presents data and insights whose outputs will impact the market in the mid-term and highlights promising applications that might boost the future growth of the segment.
 - European Solutions and Programs provides information on the current usage of Galileo, EGNOS and Copernicus services and associated relevant projects within the particular segment, and
 - Reference directly present a forecast of the installed base and revenues of the market segment by region and application.
- In this issue the Editor's special introduces the topic 'Innovative solutions for health', where EO and GNSS are showing a growing potential and are to monitor, analyse and contribute toward the mitigation of global health challenges.
- Annexes conclude the report with a description of the methodology behind the data presented (Annex 1), definition of key performance parameters (Annex 2), list of application descriptions (Annex 3), list of acronyms (Annex 4) and information about the authors (Annex 5).

GNSS REVENUES

MARKET OVERVIEW

Added-value services account for 72% of the total GNSS revenues in 2031

The global GNSS downstream market revenue from both devices and services will grow from €139 bn in 2021 to €492 bn in 2031, with a CAGR of 12.7%.

This growth is mainly generated through the revenues from added-value services. Over the next decade, these services revenues are expected to witness a skyrocketing growth of 136 per cent reaching just over €354 bn in 2031 (compared to around €126 bn in 2021). The revenues from GNSS augmentation services are forecasted to grow annually by 7%, doubling their value from €25 bn in 2021 to nearly €50 bn in 2031.

Combined services revenues (i.e. both added-value services and augmentation services) will account for 60% in 2021, more than 82% of the total GNSS downstream market revenues.

Cumulative revenue by segment 2021-2031

Road and Consumer solutions dominate all other market segments in terms of cumulative revenue with a combined total of 29% for the forecasting period 2021-2031.

In the Road sector, most revenues are generated by devices used for navigation (In-Vehicle Systems (IVS), emergency assistance, ADAS as well as fleet management applications including insurance telematics), whereas Consumer Solutions revenues mainly come from the sale revenue of smartphones and tablets using location-based services and applications.

Focusing on the remaining revenues, more than 70% of these will be generated by Agriculture (27%), Urban Development (21%) and Infrastructure (20%). Investments in Agriculture are primarily generated from commercial augmentation services and automatic steering equipment, while the primary sources of revenue in Urban Development and Infrastructure are linked to Geomatics applications (mapping and surveying, construction operations), and site selection or monitoring.

EUSPA EO and GNSS Market Report | Issue 1, 2022

7 | SOCIAL MEDIA

A | Twitter

EUSPA - EU Agency for the Space Programme ✓
15.1K Tweets

TAKE THE PULSE OF THE EO AND GNSS MARKET
DOWNLOAD THE REPORT

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@EU4Space

The EU Agency for the Space Programme #EUSPA, providing safe & performant #EUSpace Services, linking Copernicus, GNSS & GOVSATCOM to EU citizens
Prague & EU Space 🚀 euspa.europa.eu 📅 Joined August 2014
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🗨️ 3 ❤️ 5 📤



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