

Market, Downstream and Innovation



EUSPA Industry Days 2026

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Market, Downstream and Innovation

What is it?

Activities horizontal to all components (Galileo, EGNOS, Copernicus, secure satcom, SST)



Market & User Knowledge

- ✓ Market and technology monitoring and forecasting
- ✓ User and industry consultations
- ✓ User satisfaction monitoring



Demand Support

- ✓ Implementation of uptake roadmaps with users
- ✓ Cooperation with value chain players
- ✓ Technical and market contribution to regulated applications



Supply Support

- ✓ Creation of new "made in Europe" products and services (e.g. via R&I programs)
- ✓ Support to entrepreneurs (via Cassini)

Market, Downstream and Innovation

What is it?

Industry sectors



Agriculture



Aviation and Drones



Climate, Environment, and Biodiversity



Consumer Solutions, Tourism and Health



Emergency Management and Humanitarian Aid



Energy and Raw Materials



EU Border and Internal Security



Fisheries and Aquaculture



Forestry



Infrastructure



Insurance and Finance



Maritime and Inland Waterways



Rail



Road and Automotive



Space



Urban Development and Cultural Heritage

Commonly purchased services and supplies under the Market, Downstream and Innovation

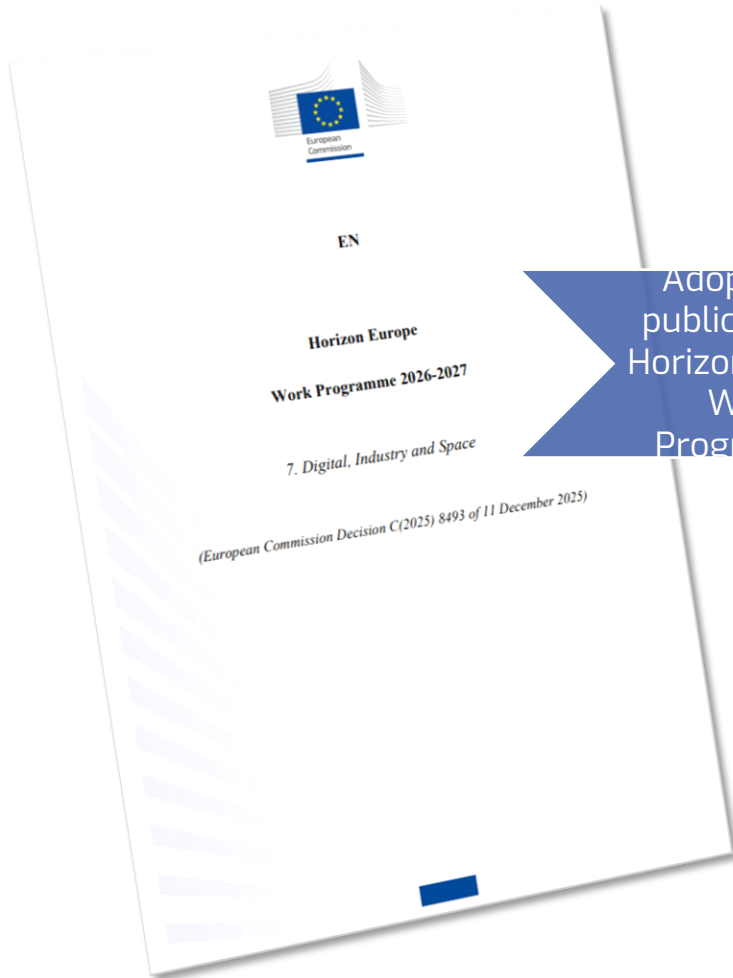
- **Provision of technical and business support for downstream space market development (EUSPA/OP/21/21)**
 - Lot 1: Market and technology monitoring: multiple FWC for €4.5M, signed Jan/Feb 2023
 - Lot 2: Research, Innovation and Entrepreneurship: multiple FWC for €3.5M, signed May 2023
 - Lot 3: Professional applications: multiple FWC for €3.5M, signed Oct 2023
 - Lot 4: Environment and Consumer: multiple FWC for €4M, signed Feb 2023
 - Lot 5: Mobility and Aerospace: FWC for €5M, signed June 2023
 - Lot 6: Governmental, Infrastructure and Emergency: multiple FWC for €4M, signed Oct/Nov 2023

Commonly purchased services and supplies under the Market, Downstream and Innovation

- **Copernicus Demonstrators (EUSPA/OP/03/22)**
 - Lot 1 - Mobility and Governmental, DC for €1.7M, signed on Aug23
 - Lot 2 - Consumer and Environment, DC for €1.6M, signed on Aug23
- **Cassini Hackathon and Matchmaking (EUSPA/OP/03/23)**
 - Lot 1 - Cassini Hackathons, DC for €2.3M signed in Apr24
 - Lot 2 - Cassini Matchmaking, DC for €2.8M signed in Feb24



Horizon Europe Work Programme 2026-2027



Upcoming procurements & activities: What is Fundamental Elements Programme?

EUSPA's R&D funding mechanism supporting the development of Galileo- and EGNOS-enabled downstream applications and technologies, accelerating their uptake in commercial markets.



Fundamental Elements supports the full innovation chain:

From prototype solutions → to pre-commercial validation

From emerging technologies → to operational deployment

From early adopters → to sustainable market growth



Fundamental Elements enables:

Industrialization of Galileo differentiators (OSNMA, HAS, multi-frequency, etc.)

Development of competitive European products

Strengthening EU industrial capacity in key market segments

Faster transition from R&D to real products in the hands of users

Upcoming procurements & activities: The Added Value of Fundamental Elements

... drives real commercial impact, not research for research's sake.



User-driven, market-oriented

Solutions are shaped around verified user needs



Accelerates market adoption of current differentiators

OSNMA, HAS, multi-frequency, etc



Prepares for commercial implementation of new differentiators

EWSS, SAS, ARAIM



Strengthens European competitiveness

ML/AI, Advanced processing and system concepts



Promotes cross-programme synergies

Copernicus, SatCom etc.

Allocated EC budget for
FE2
€43 million
2021-2027

For open calls regularly
check EUSPA website

<https://www.euspa.europa.eu/opportunities/fundamental-elements>



Upcoming procurements & activities: Calls for experts



CALL FOR EXPERT [EUSPA/CEI/03/26]

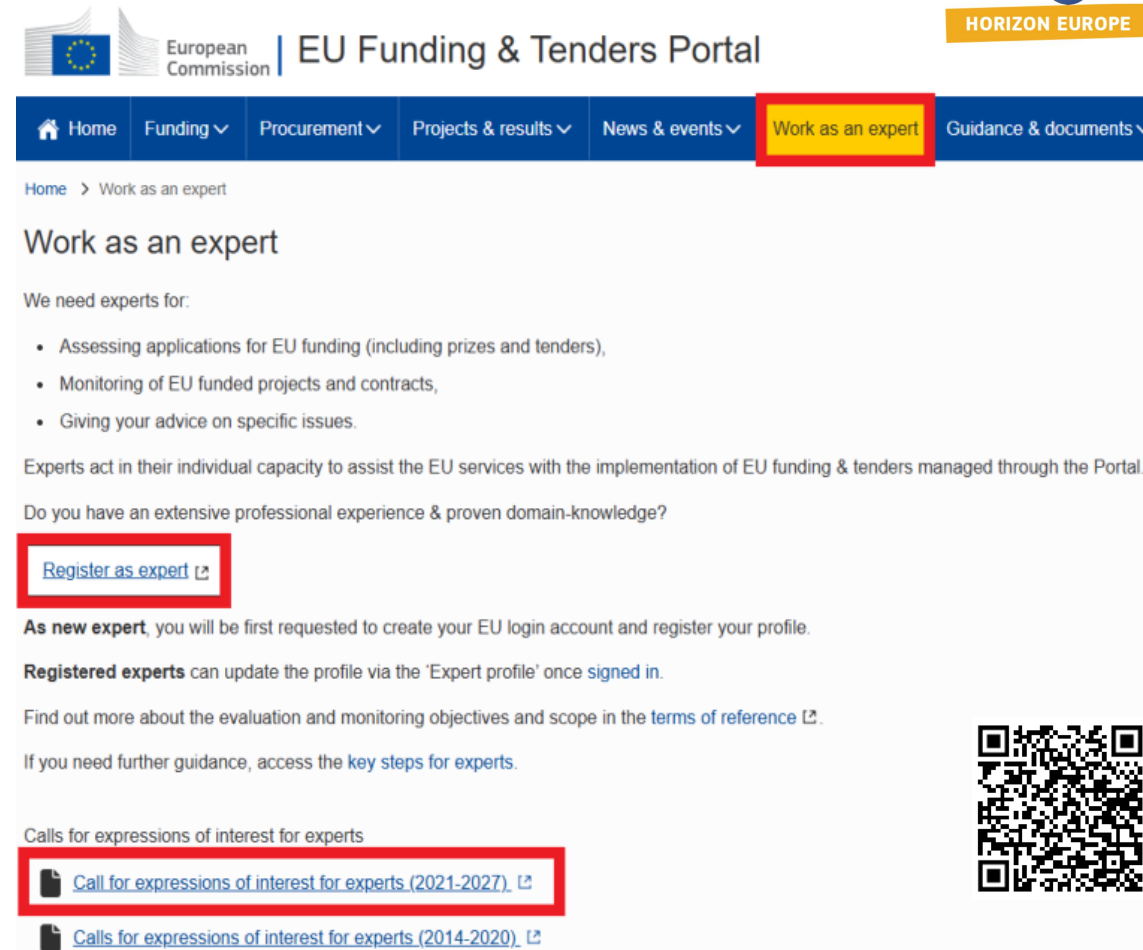
EUSPA is looking for experts to provide support in:

- Monitoring of EU funded projects and contracts
- Providing opinions and advice on specific issues
- Assessing applications for EU funding (including tenders, grants and prizes)

The objective of this Call for experts is to set up a list of external Experts to provide advice to the Agency in the defined areas

More info at:

<https://www.euspa.europa.eu/opportunities/procurement-grants/procurements/call-experts>



The screenshot shows the 'Work as an expert' page on the EU Funding & Tenders Portal. The navigation bar includes 'Home', 'Funding', 'Procurement', 'Projects & results', 'News & events', 'Work as an expert' (highlighted in red), and 'Guidance & documents'. Below the navigation bar, the page title is 'Work as an expert'. The main content area lists the types of experts needed: 'Assessing applications for EU funding (including prizes and tenders)', 'Monitoring of EU funded projects and contracts', and 'Giving your advice on specific issues'. A red box highlights the 'Register as expert' link. Below this, there is a QR code and a list of 'Calls for expressions of interest for experts', with the first link, 'Call for expressions of interest for experts (2021-2027)', also highlighted in red.

CASSINI #EUSpace



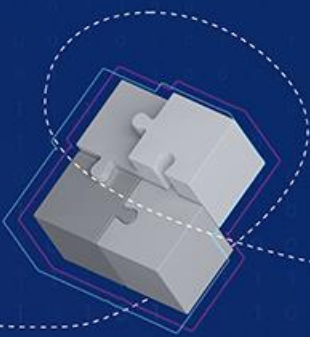
● **Space Camps**

The **Space Camps** build up interest for space and careers



● **Hackathons & Mentoring**

The **Hackathons & Mentoring** fosters EU Space ideas



● **Challenges**

The **Challenges** boost EU Space commercial solutions



● **Business Accelerator**

The **Business Accelerator** develops start-ups capabilities



● **Matchmaking**

The **Matchmaking** connects start-ups with new partners



● **Investment Facility**

The **Investment Facility** eases risk capital to EU Space companies



● **EU Space Academy**

The **EU Space Academy** introduces innovators to EU Space



● **Investor Network**

The **Investor Network** supports equity investment needs



● **Entrepreneurship Days**

The **Entrepreneurship Days** bring together the CASSINI ecosystem

+ many other start-up & cross industry events in the EU

Upcoming CASSINI actions



CASSINI Challenges (deadline 26 March)

Innovation competition for Minimum Viable Products solving a challenge with space technology.

12 winners awarded **€100k each!**

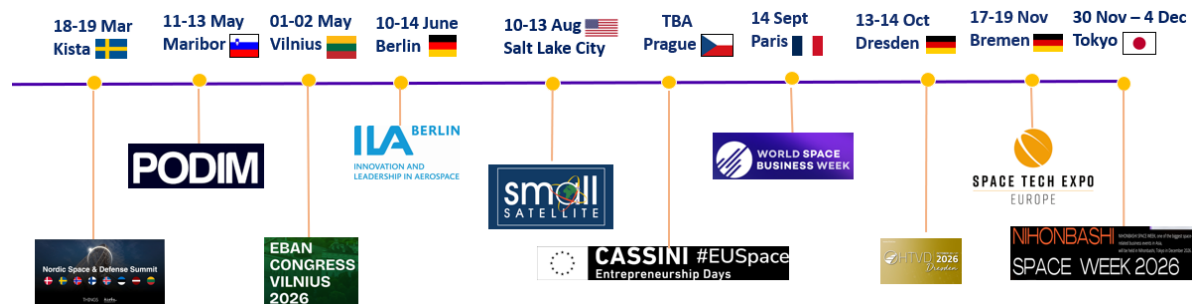
11th CASSINI Hackathon (24-26 April)

Weekend hackathon to come up with ideas that target high social impact business opportunities happening across 10 locations. EU Finalists compete for **€9,000 worth of** cash prizes and mentoring.



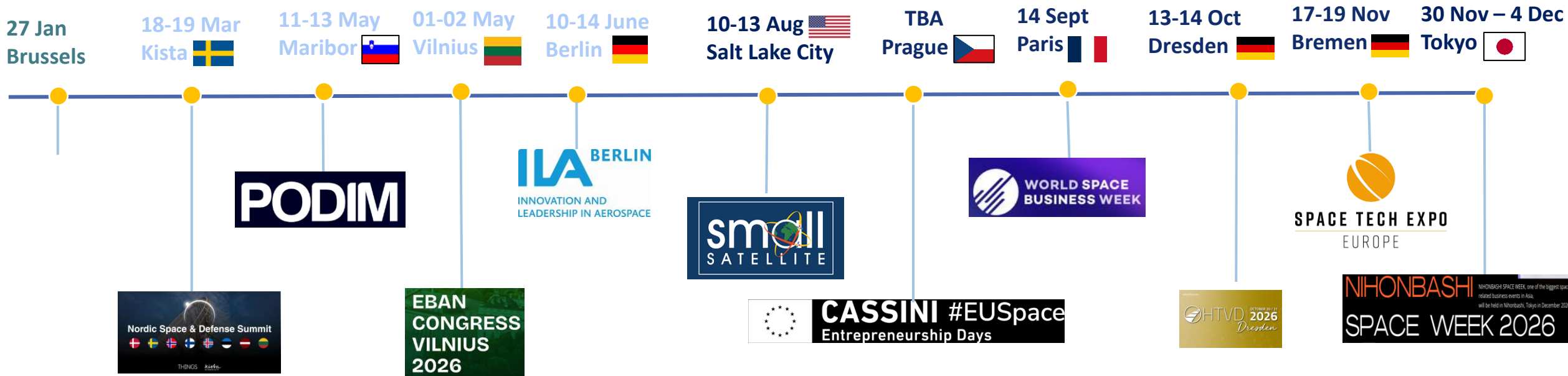
CASSINI Matchmaking

Side events at major events in Europe and beyond:



CASSINI Matchmaking 2026

- Online community hub – directly contact investors
- Matchmaking events 2026:



Procurement EUSPA-OP-07-25

“Make it with Space”

Background and objectives

- Despite major Union's investments in downstream **EU space solutions** (=> solutions using space data, products and services offered by the EU Space Programme), many innovations even if technologically mature (TRL 7-9) remain underutilised, and the market for them is underdeveloped due to **"last-mile" barriers to commercialisation**
- **The immaturity of demand** for space data, products and services creates a market failure that prevents mature EU space solutions from reaching wide adoption
- This procurement aims at enabling EUSPA not only to understand better the adoption barriers and gaps on the demand side, but also to scale up the successful outcomes of the commercialisation of the EU space solutions, aiming at a **shift towards a more mature and consolidated demand**
- Complementing other initiatives of the EU Space Programme, such as **CASSINI, Fundamental Elements and Horizon Europe** (see Tender Specs for a list of previous projects and compatible devices)

Scope of the FWC

- Procurement of **market development services and supplies** (e.g. hardware and software) from the downstream market providers of EU space solutions and **to bridge the gap from supply to operational use**;
- The services provide to the Union:
 - concrete lessons learned and guidelines related to **overcoming the “last mile” barriers to commercialisation** of the EU space solutions, as well as
 - their scale up potential derived from the **unique experiences of the providers** gained in the process of deploying the solutions in the operational environments of new end users;
- The scope of the FWC covers **all the application areas/topics and the 16 market segments** as defined in the EUSPA GNSS and EO Market Report.

Tasks to be performed

- **Task 1** - Identification of commercialisation opportunities for the EU space solutions (using Galileo, EGNOS and Copernicus) and engagement of new end users;
- **Task 2** - Deployment of EU space solutions in the operational environments of new end users;
- **Task 3** - Preparation of the Make it with space booster, collecting lessons learned, established protocols, proven methods and guidelines for excellence.

Timeline

Deadline for requests for clarifications	08/04/2026	Clarification requests to be submitted only via the Funding & Tenders Portal (see above).
Last date on which clarifications may be issued by EUSPA	10/04/2026	All clarifications will be published at the Funding & Tenders Portal (see above).
Deadline for submission of tenders	16/04/2026 at 23.59 (CEST)	According to conditions of submissions set out in section 16.7 of these Tender Specifications.
Opening session and start of evaluation process	17/04/2026 at 11.00 (CEST)	As per section 16.9 of the present document.
Completion of evaluation	09/2026 (estimated)	The estimated date is only indicative, it may be changed, and it is not binding on the Contracting Authority.
Award	09/2026 (estimated)	The estimated date is only indicative, it may be changed, and it is not binding on the Contracting Authority.
Estimated start of implementation of the Contract.	10/2026 (estimated)	The estimated date is only indicative, it may be changed, and it is not binding on the Contracting Authority.

Implementation of the FWC

- The objective of this procurement is to **conclude a Multiple Framework Contract with reopening of competition with maximum 3 contractors (“FWC”)** with a maximum duration of 48 month.
- The FWC will be implemented through Specific Contracts (“SCs”), awarded with reopening of competition - all contractors are invited to compete for the award of the SC.*

**The signature of the FWC does not impose an obligation on EUSPA to conclude SCs with a framework contractor.*

- EUSPA envisages to sign several SCs during the execution of the FWC.
- EUSPA will define for each SC the specific scope and the relevant market segments/application areas/topics to be covered by the activities to be performed.

Evaluation of the FWC

- The evaluation of the FWC Tender is based on the **Evaluation Scenario**.
- The Evaluation Scenario covers the activities to be procured under Specific Contract 1 (SC1)* for a duration and a maximum estimated price (see Section 4.3 of the TS).
- The price offered by the tenderers for the Evaluation Scenario according to the modalities provided under Section 16.6.3.3 will be the Total Price for Evaluation Purposes of the Tender.

** In case the requirements and assumptions for the Evaluation Scenario do not change at the time the Agency decides to procure the corresponding activities, the Tenderer's offer for the Evaluation Scenario shall be considered binding and enforceable for the overall duration of the FWC, subject to the confirmation to be requested from the Contractors of their intention to participate in the reopening of competition for the award of the Specific Contract 1 (SC1).*

Evaluation Scenario - Applications areas/topics

- 1) Galileo Open Service-Navigation Message Authentication (OSNMA) for resilient Critical Infrastructure networks
- 2) Operational Disaster Resilient tools for European cities and regions
- 3) Galileo OSNMA for efficient firefighting operations
- 4) EU Space based solution to preserve cultural and natural heritage
- 5) Galileo OSNMA for robust fishing Vessel Monitoring System (VMS)
- 6) Copernicus solutions to support Aquaculture Farming
- 7) EGNSS differentiators for transport position reporting
- 8) Galileo High Accuracy for maritime and offshore operations
- 9) EGNOS based solutions supporting inland waterways
- 10) Copernicus and EGNSS based tools for smart and liveable cities



Evaluation Scenario tasks

Discover



Deploy



Scale

Task 1 - Identification of **Commercialisation Opportunities** for the EU Space Solutions (using EGNSS and Copernicus) and Engagement of New End Users

- a) Identification of use cases and suitable EU space solutions;
- b) Engagement of new end users;
- c) Preparation of implementation plans of the EU space solutions per each use case and their integration in the operational environments of the selected new end users (20 users)

Task 2 - Deployment of EU space solutions in the operational environments of new end users

Based on the **20 implementation plans** covering 10 application areas and 2 users per use case, as approved by EUSPA under Task 1

- a) Optimal integration of the EU Space solutions in the operational environments of new end users
- b) Deployment of the EU space solutions in the operational environments of new end users
- c) Performance of necessary activities which are collateral to the deployment of the EU space solutions in the operational environments of new users and enabling their long-term, fruitful exploitation.
- d) Preparation of a cost benefit analysis and a gap analysis from the new end user perspective

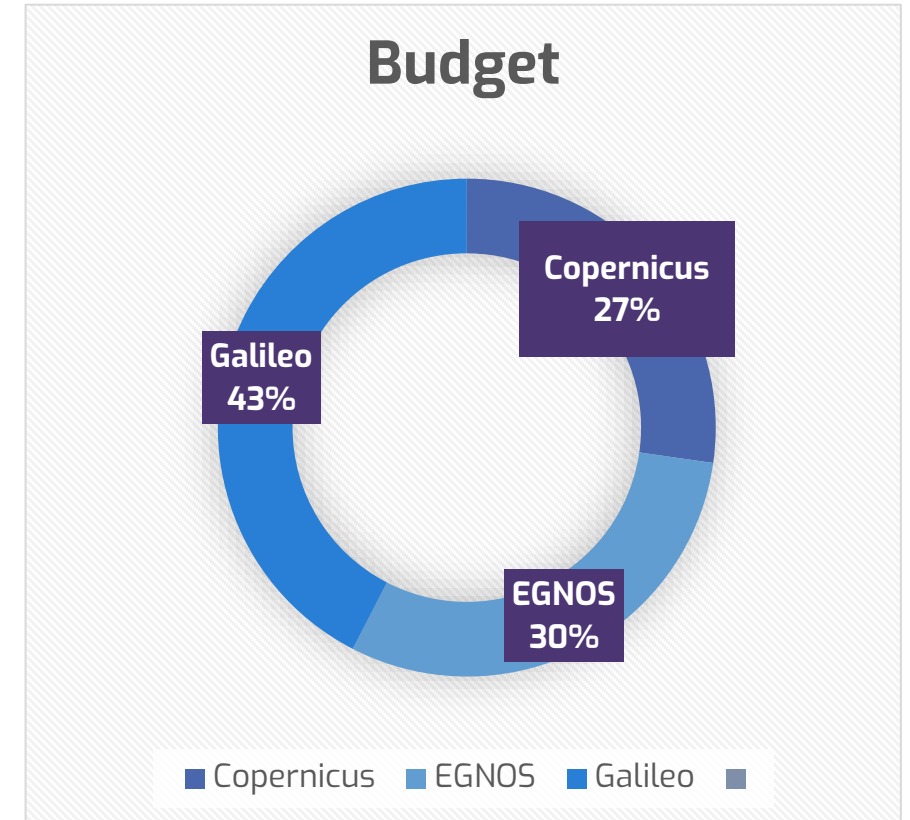
Task 3 - Preparation of the Make it with space booster

- a) Development of a Make it With Space Booster toolkit enabling the Agency to showcase the benefits of the use of EU space solutions
- b) Preparation and provision of Make it With Space Booster activities aiming at stimulating the user demand
- c) Recommendations to EUSPA to tackle the downstream market fragmentation and the immaturity of the end user demand, per application area/topic.

Contractors shall perform all the activities for each of the 10 Application Areas/Topics.
Tender Specifications include deliverable list and timeplan requested for implementation.

Main Contractual Provisions

- **Ceiling:** EUR 16.500.000,00 for the entire duration of the FWC.
- **Place of Performance:** the Contractor's premises and end users' premises, having to be located within a Member State of the EU
- **Duration:** 48 months
- For other relevant provisions on **Ownership, Subcontracting obligations, Liability** please refer to the Draft FWC.



Supply Chain and Subcontracting Requirements

- Promote the widest and most open participation possible by economic operators, in particular start-ups, new entrants and SMEs.
- Minimum 40% share of sub-contracting to be awarded in competitive tendering in the course of the execution of the contract - outside the Undertaking.
- **Quality** and **maturity** of the **plans** on how to achieve the above-mentioned target (%) and to maximise participation of start-ups, new entrants (etc.) and the relevant commitment are evaluated under Q5.
- The percentage of subcontracting will be calculated as the percentage from the actually requested services under the FWC and not as a percentage from the maximum nominal volume of the FWC => Shall be implemented at the level of each individual Specific Contract.



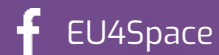
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Linking space to user needs

Get in touch with us

www.euspa.europa.eu



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