

Europe GNSS Chip for Timing and Synchronization Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe GNSS Chip for Timing and Synchronization Market is projected to grow significantly, reaching an estimated US\$ 63,147.4 thousand by 2031, up from US\$ 38,319.2 thousand in 2024. This growth reflects a compound annual growth rate (CAGR) of 7.7% from 2025 to 2031, indicating a robust demand for GNSS chips in various applications across the region.

Executive Summary and Market Analysis

The market for GNSS chips dedicated to timing and synchronization in Europe is categorized into several key regions, including Germany, France, the UK, Italy, Russia, and the rest of Europe. The increasing reliance on GNSS chips for timing and synchronization is driven by the evolving telecom infrastructure, which is increasingly adopting virtualized and cloud-native designs. A notable development in this sector occurred in February 2025, when u-blox announced a strategic partnership with Intel to create the M2-ZED-F9T GNSS timing card. This card is specifically designed for Intel's Xeon 6 SoC platforms and provides sub-microsecond timing accuracy, which is essential for virtualized Radio Access Networks (vRANs) that operate across various radio access technologies. As vRAN deployments expand, precise GNSS-based timing is becoming a critical requirement rather than a mere option. The introduction of solutions like the M2-ZED-F9T exemplifies the industry's shift towards integrated, high-precision timing modules that are vital for next-generation mobile architectures, thereby propelling the GNSS chip market for timing and synchronization in Europe.

Strategic Insights

Market Segmentation Analysis

The Europe GNSS Chip for Timing and Synchronization Market is segmented by device and industry vertical. In terms of device types, the market includes Cellular Network Devices, Small Cells, Public Mobile Radios (PMR), Phazor Measurement Units (PMU), and others. In 2024, the 'Others' category held the largest market share. When segmented by industry vertical, the market encompasses Telecom and IT, Energy, Banking, Financial Services, and Insurance (BFSI), Consumer Electronics, Automotive and Transportation, and others. The Telecom and IT sector dominated the market share in 2024, reflecting the critical role of GNSS technology in these industries.

Market Outlook

As businesses transition to cloud-based environments, hybrid cloud networks, and interconnected data centers, they face new challenges, including increased cyber threats and risks of spoofing and jamming that can compromise GNSS functionalities. Consequently, GNSS technology has become a cornerstone in the hybrid strategies adopted to mitigate these risks. Large enterprises recognize the importance of Security Operation Centers (SOCs) for monitoring and managing their security frameworks, which rely on accurately timestamped and synchronized logs from a single time source. This is essential for maintaining automation, threat detection, operational continuity, and enabling analytical tools. The use of protected GNSS signals, such as Galileo OSNMA, along with advanced dual-frequency receivers, forms the foundation of a robust "positioning, navigation, and timing" (PNT) environment. Furthermore, the vast amounts of GNSS PNT data stored in the cloud can be processed using AI and machine learning techniques to extract valuable insights, thereby reducing GNSS-related risks. This growing demand for enhanced timing and synchronization capabilities to bolster cybersecurity in data centers and cloud services is driving the need for GNSS chips.

Country Insights

The market is also analyzed by country, with significant contributions from Germany, France, the United Kingdom, Italy, Russia, and the Rest of Europe. In 2024, the Rest of Europe accounted for the largest market share. Key countries in this segment include Sweden, Denmark, and the Netherlands, where there is a strong emphasis on digital connectivity and advanced telecommunications infrastructure, leading to increased demand for precise timing and synchronization solutions. For instance, in June 2024, Tele2, a Swedish telecom operator, secured a loan agreement worth approximately US\$149 million (EUR 140 million) with the European Investment Bank (EIB) to enhance high-speed mobile networks in Sweden, aiming to provide 5G coverage to 99.9% of the

population. Additionally, the Netherlands has seen growth in its IoT market, fueled by investments in 5G networks and an expanding cloud computing sector, which further supports the need for accurate timing and synchronization technologies critical for the performance and reliability of next-generation mobile networks.

Company Profiles

Key players in the Europe GNSS Chip for Timing and Synchronization Market include STMicroelectronics NV, Broadcom Inc, Safran SA, NovAtel Inc., Septentrio NV, u-blox Holding AG, Quectel Wireless Solutions Co., Ltd., Furuno Electric Co., Ltd., LOCOSYS Technology Inc., and Protempis, LLC. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to deliver cutting-edge products to their customers and enhance their market presence.

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