New Space Renaissance: Space 2.0

Accelerating Innovation in Space-Based Communications... To Boldly Go!

Unlocking the Connected Cars Via Satellite Opportunity

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Understanding the opportunity

Improving economics

Terminal strategy

Enabling overall ecosystem

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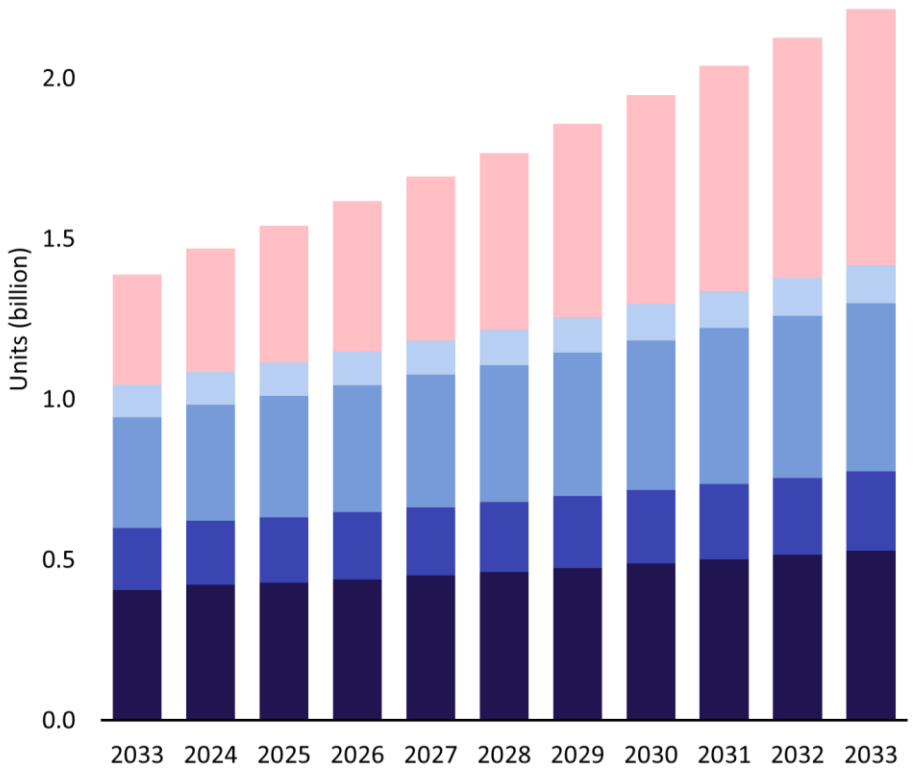
Understanding the satellite-enabled connected cars opportunity

Strong latent **consumer interest**: Our consumer survey shows highest willingness to pay among urban and younger respondents

Structural market drivers leading the adoption through **SDV and V2X mandates**

Projected **USD 74 billion** cumulative retail revenue opportunity in the next decade

Figure 1: Satellite-enabled connected cars addressable market 2023-2033



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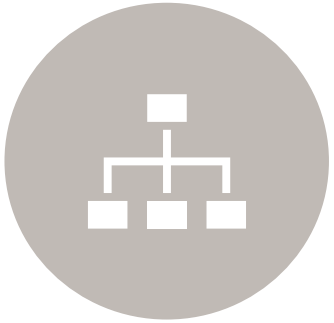
Challenge: The integration gap between ecosystem, hybrid networks, and terminal architectures



Satellite is not architecturally embedded

Fragmented hybrid network orchestration

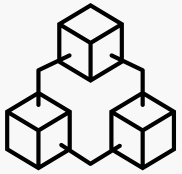
Misaligned monetisation models

Terminal industrialisation gap

Solution: The integration gap between ecosystem, hybrid networks, and terminal architectures

Improving Economics

- What is the right monetisation model: data-based, reliability-based, or service-tiered?
- Which segments can sustainably support satellite ARPU first?
- How do we align pricing with real satellite network load?



Terminal Strategy

- What cost threshold must terminals reach to be viable at scale?
- How can installation be simplified for seamless factory integration?
- Are terminals compact and power-efficient enough for SDV platforms?
- Can hardware meet automotive-grade ruggedness and lifecycle standards?

Strategic Partnerships

- Who owns orchestration in hybrid networks? And how do satellite operators integrate into OEM SDV roadmaps early?
- What role do standards (3GPP NTN, 5GAA) play in accelerating adoption?

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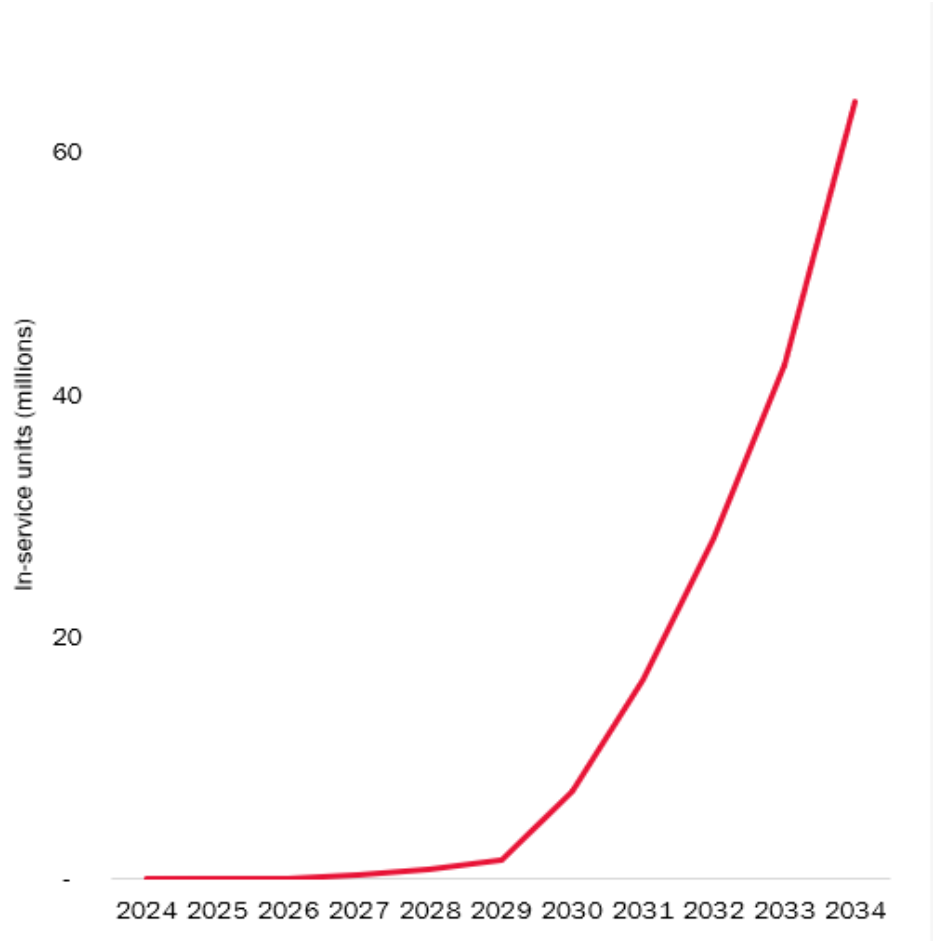
Improve economics to enable scalable adoption

Figure 2: Satellite-enabled connected cars adoption trend 2024-2024



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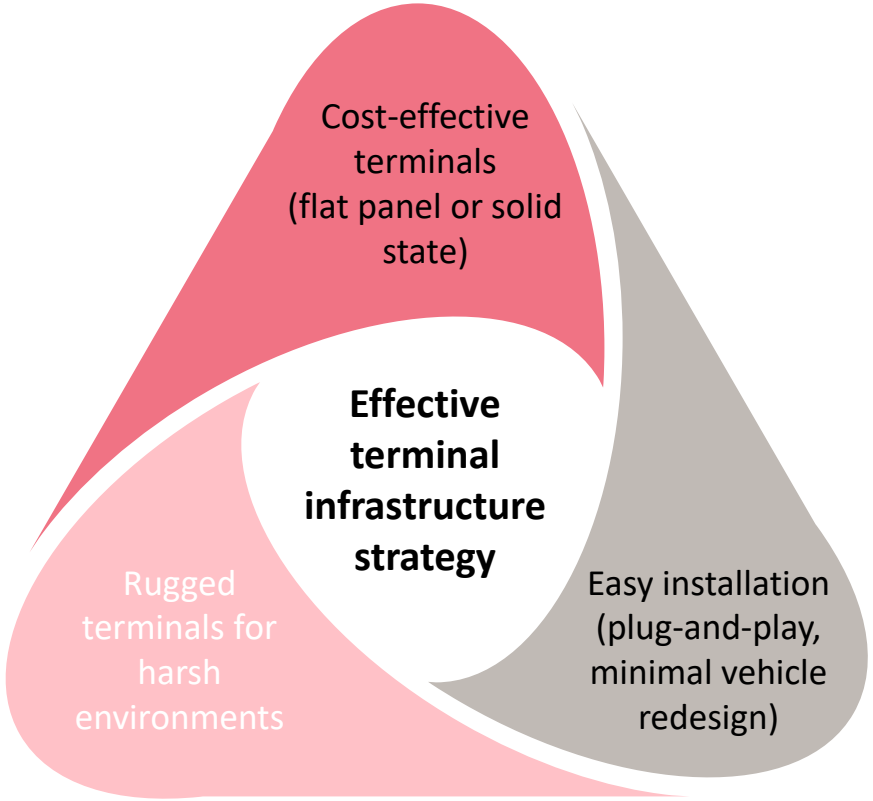
Terminal strategy should take segment-specific needs into account



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Build deep OEM partnerships and standards-led integration

OEMs

- Integrate satellite connectivity into vehicles.
- Drive large-scale adoption through factory-fit installations.

Satellite operators

- Provide the underlying connectivity infrastructure, ensuring global coverage, bandwidth availability and service reliability.

Regulatory associations

- Set the safety, spectrum, and operational standards governing in-motion satellite systems.

Equipment vendors

- Design and manufacture compact, rugged and vehicle-ready terminals that meet automotive standards.

Recommendations

1

Anchor satellite connectivity in high-value, mission-critical automotive use cases

2

Industrialise low-cost, automotive-grade terminals for factory integration

3

Forge standards-led OEM partnerships for seamless hybrid integration

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