

Satellite-Telco Integration Opportunities and State of the Market



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Experts in the satellite and space industry for more than 24 years

NSR An Analysys Mason Company

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- > Exceptional breadth of topics spanning satellite communications, hybrid and emerging applications, broadcasting and digital media, commercial space as well as 5G, fibre and satellite platforms

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Mobile Services
Fixed-Mobile Convergence
Smart Devices
Future Comms
Video, Gaming and Entertainment



Networks

Next-Generation Wireless Networks Wireless Infrastructure Strategies Fibre Infrastructure Strategies Operator Investment Strategies Telecoms Strategy and Forecast Transport Network Strategies



Applications

Network Automation and Orchestration Customer Engagement Monetisation Platforms Digital Experience Automated Assurance Service Design and Orchestration Telecoms Software Market Shares



Satellite and Space

Satellite Communications
Space Applications and Infrastructure



Operator Business Services and IoT



Enterprise Services SME Services IoT Services Private Networks

SMB IT Channels and Forecasts



Cyber Security SMB Technology Forecaster

Regional Markets



Global Telecoms Data and
Financial KPIs
Americas
Asia-Pacific
Middle East and Africa
European Core Forecasts
European Telecoms Market Matrix
European Country Reports

Cloud



Cloud Infrastructure Strategies
Data, Al and Development Platforms
Edge and Media Platforms
Multi-Cloud Networking





~2800 forecast and 280+ historical metrics Regional results and worldwide totals Operator historical data



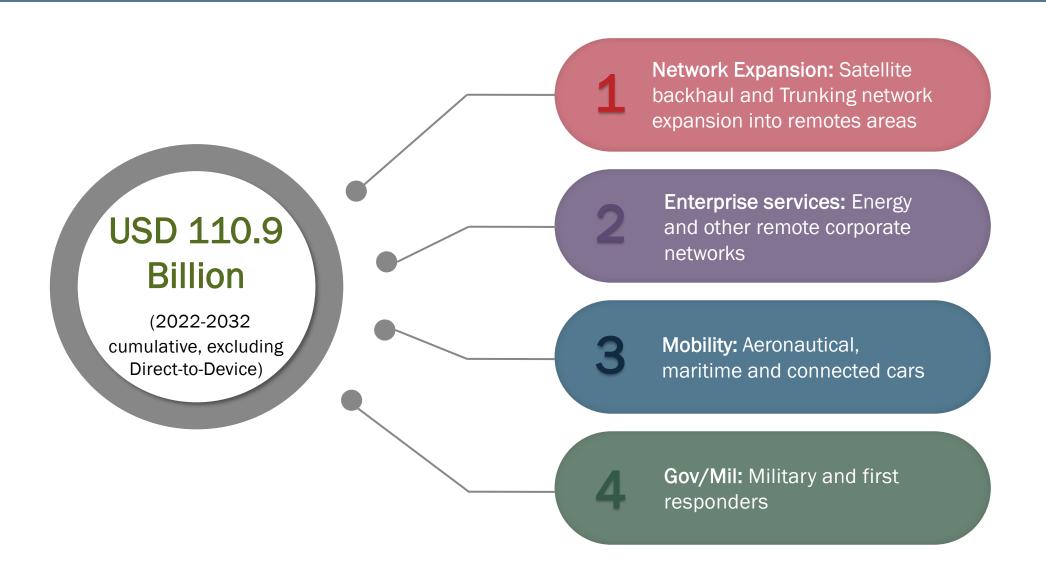
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Why is satellite more relevant in the 5G era?





Key driving forces for 5G satellite service revenue

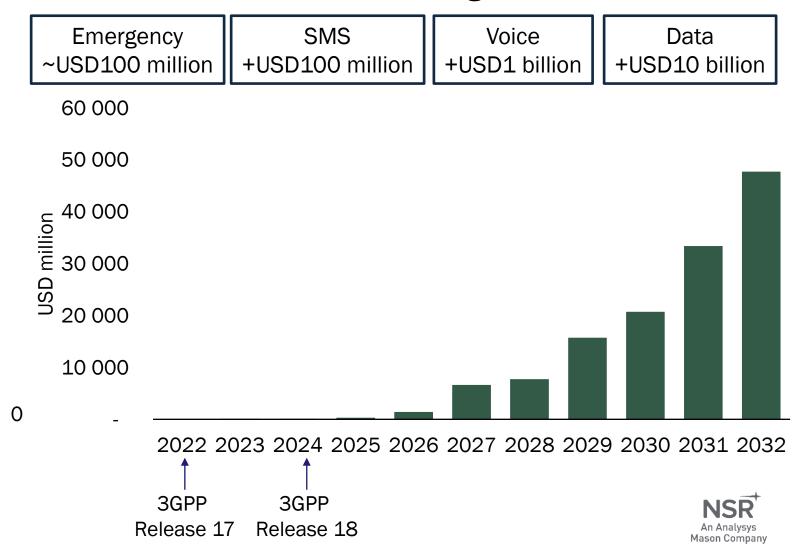




D2D capabilities still need to evolve significantly for the market to develop meaningful revenue opportunities

Satellite D2D consumer segment revenue

- The market will see four waves of satellite-based D2D capabilities
- D2D will remain a high-end offer, especially in the initial stages



Building the right ecosystem of partners is essential for Satellite and NTN success

Satellite services Telcos and MNOs Test equipment **User Equipment** Infrastructure Use cases Keysight, Rohde & Mediatek, Nokia, Ericsson, Skylo, Starlink, Intelsat, Deutsche Telekom. Direct-2-Device. Schwarz Qualcomm, Sony, Huawei, ZTE, SES, Hispasat, Thuraya, Vodafone, KT, KDDI, Satellite Backhaul, IoT, Huawei, SKYPHONE Radysis, Capgemini, Orbcomm, Iridium, ViaSat, China Telecom, NTT first responders, by Thuraya Druid, Mavenir Lynk, AST SpaceMobile, DOCOMO, AT&T, sovereign connectivity, Echostar, SatelloT, OQ Telefónica and more Thales Alenia Space, **Technologies** Airbus, Astranis, Aalto HAPS

Agencies and organizations

GSMA, European Space Agency, Global Satellite Operator's Association



Satellite-telco integration: challenges and considerations



Technical considerations

- New connectivity models and infrastructure
- Interoperability
- Interference management



Regulatory and policy challenges

- Spectrum allocation and coordination
- Licensing and compliance requirements

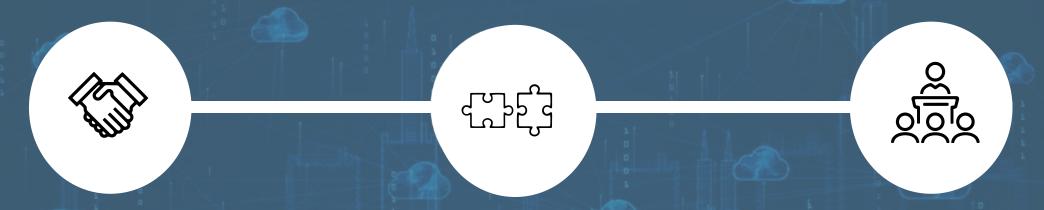


Economic and financial aspects

- Cost of deploying and maintaining networks
- Revenue-sharing models and business agreements



Satellite-telco integration: strategies for success



Effective partnerships across the ecosystem:

- Evaluate skills and market objectives
- Innovative business models
- Joint ventures, strategic alliances, M&As

Collaborative network planning and integration:

- Ensuring seamless integration of networks
- Coordinating network management and operations
- Standards

Education and support:

- Bridge the knowledge gap
- Demonstrate business cases and build confidence
- Lower the entry barriers



