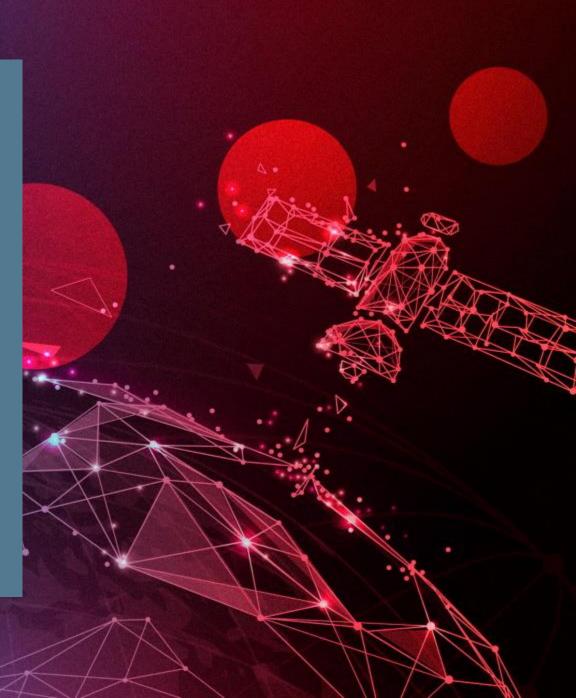


## Satellite IoT: expanding to new markets



- Alan Crisp
- Senior analyst



## About NSR

## Why satellite IoT

### Satellite IoT opportunities



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

### What we offer:

- > A unique perspective on the satellite, space, telecoms, media and technology markets
- > Market research and consulting services assisting organisations with their strategic decision making
- 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



## Analysys Mason: global TMT research coverage



#### Consumer Services

Fixed Broadband Services 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



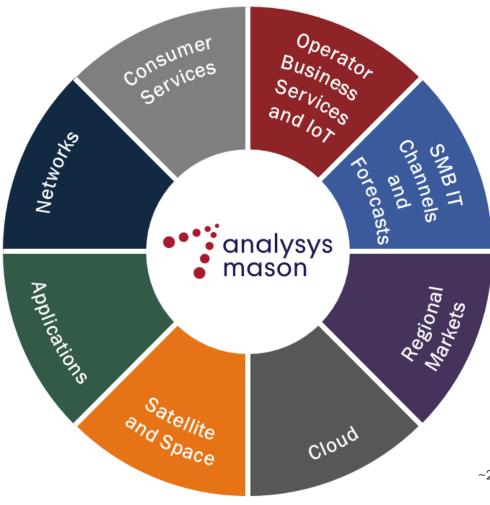
#### Applications

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

 $\bigotimes$ 

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

#### DataHub

Cloud

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

analysysmason.com/what-we-do/practices/research



## Why is satellite IoT relevant now?

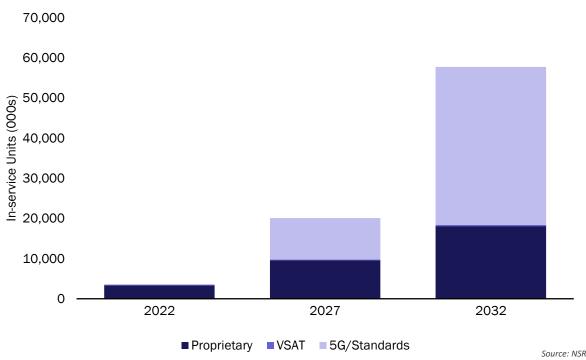


## New 5G and other standards-based waveforms will change the market landscape, with more integration with terrestrial MNOs

### Satellite IoT in-service units, worldwide

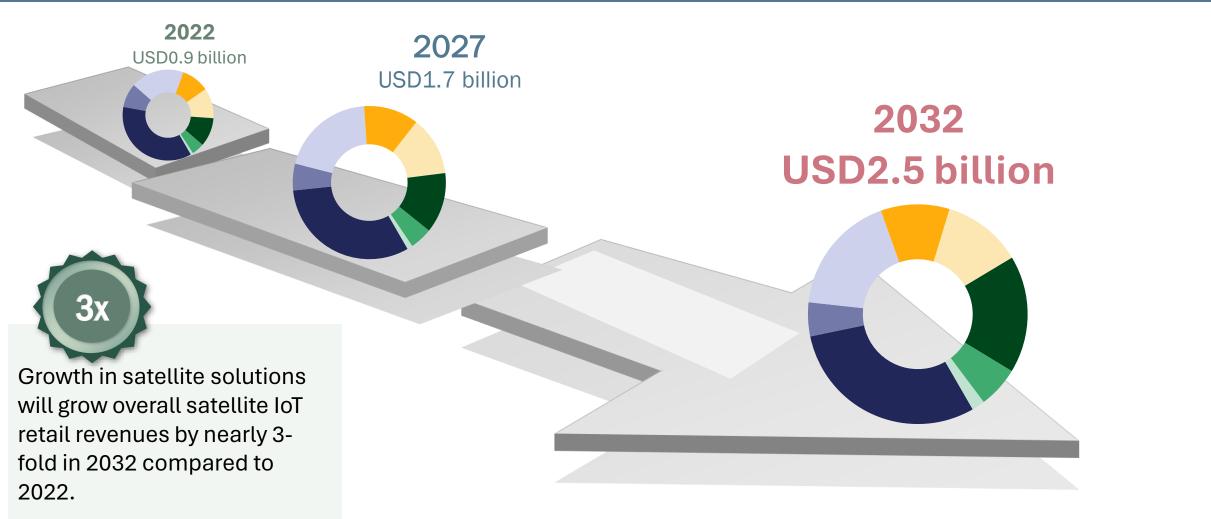


- Current proprietary waveforms from MSS operators will make way to new 3GPP based NTN IoT standards
- Legacy MSS services will remain a highend offer
- Generated revenues will see a shift towards terrestrial MNOs

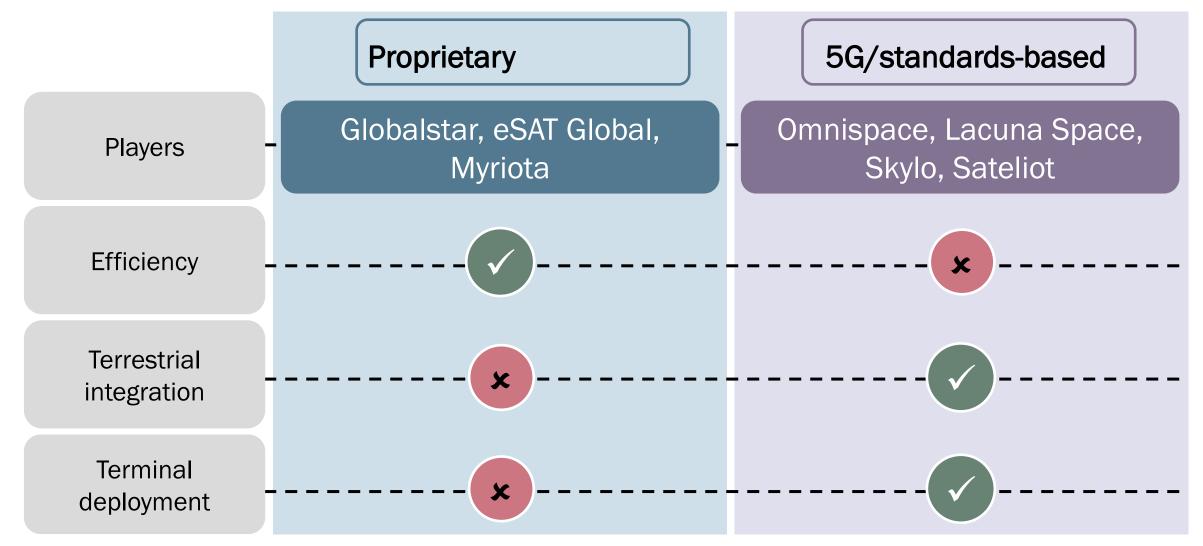




## How big is the satellite IoT revenue opportunity?

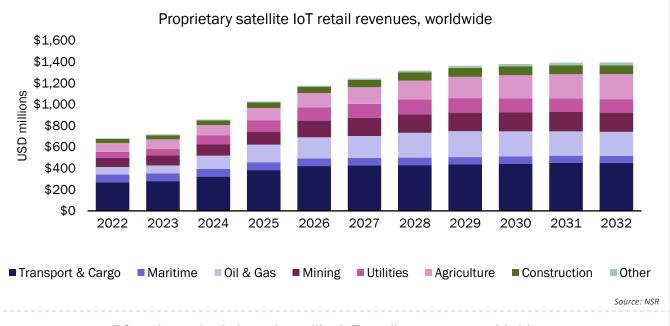


## Advantages and challenges of each waveform strategy for next-gen IoT



• analysys • mason

## Land transport, energy markets, and agriculture the largest revenue drivers



5G and standards-based satellite IoT retail revenues, worldwide \$800 \$700 \$600 suoillim \$400 \$400 - GS \$300 \$200 \$100 \$0 2029 2031 2032 2023 2024 2025 2026 2027 2028 2030 2022

• Agriculture driving new proprietary IoT demand.

- Lower cost and lack of roaming requirements driving demand.
- Roaming through convergent networks to drive land transport use cases.
  - However, only a much smaller proportion of such end users will value 100% connectivity, all of the time.
- Roaming capability onto satellite networks will not be an automatic upgrade for most terrestrial end users.
  - Identifying customers who value closing the coverage gap the most is key to growing customer base.

