

The Global Satellite Landscape in the Next Decade: Key Market Trends and Opportunities

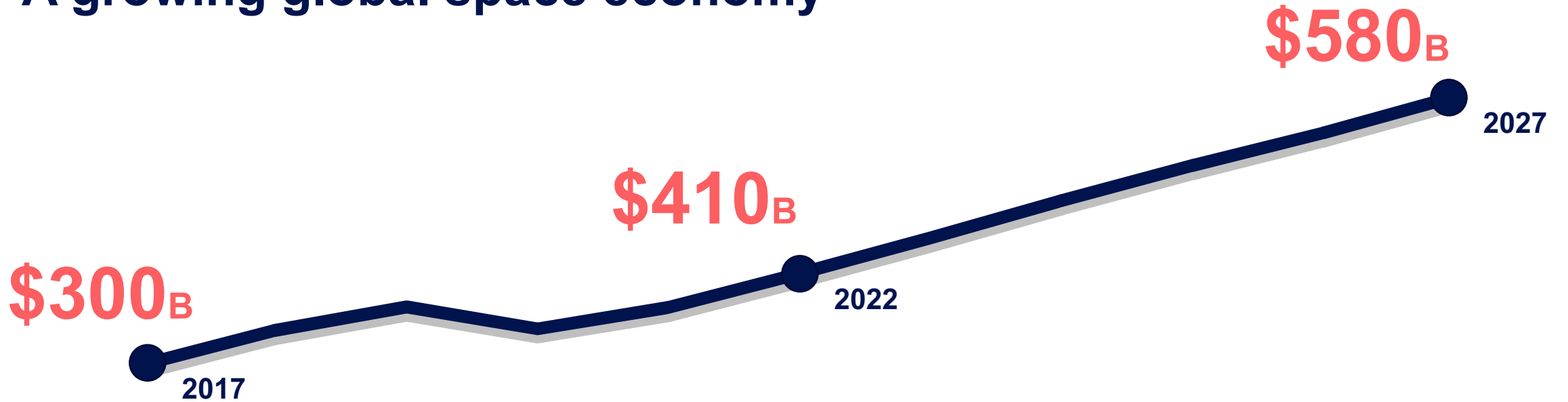
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01st of June 2023



A growing global space economy



The global space economy is experiencing **strong market dynamics** pushed by:



New supply and demand drivers



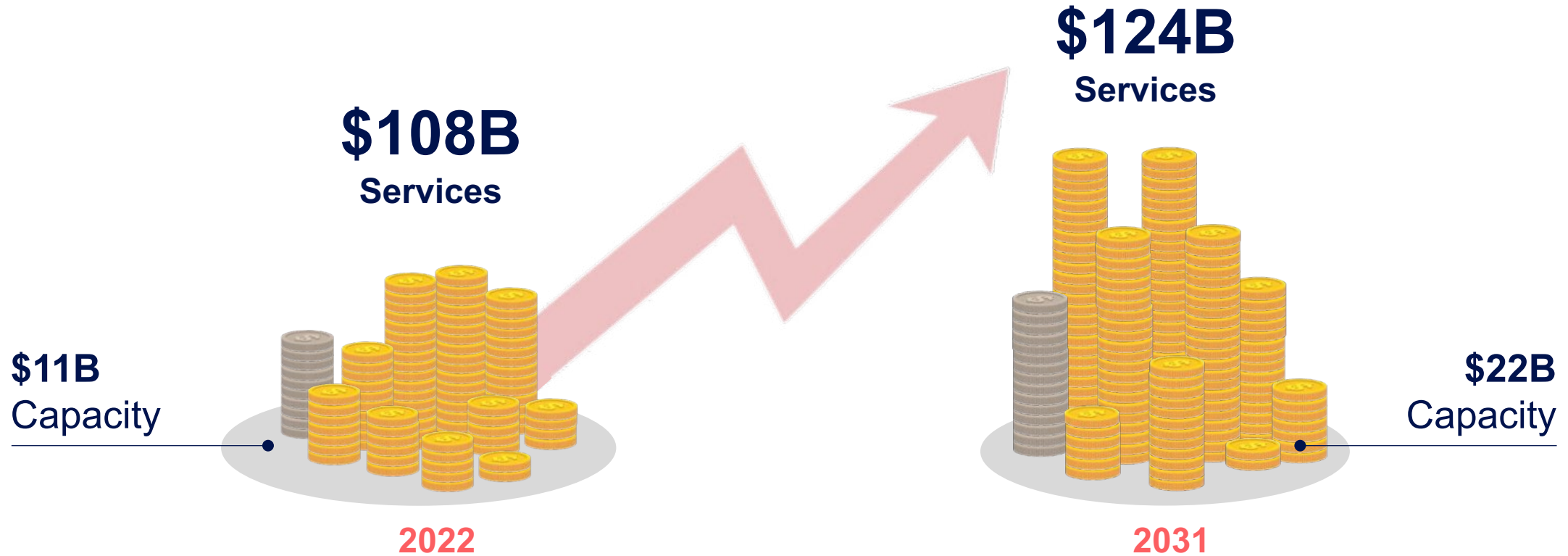
Disruptive innovations



Transforming business models

Satellite Connectivity

a \$124 Billion Market



DRIVERS



Increasing Vertical Integration



Data-centric businesses

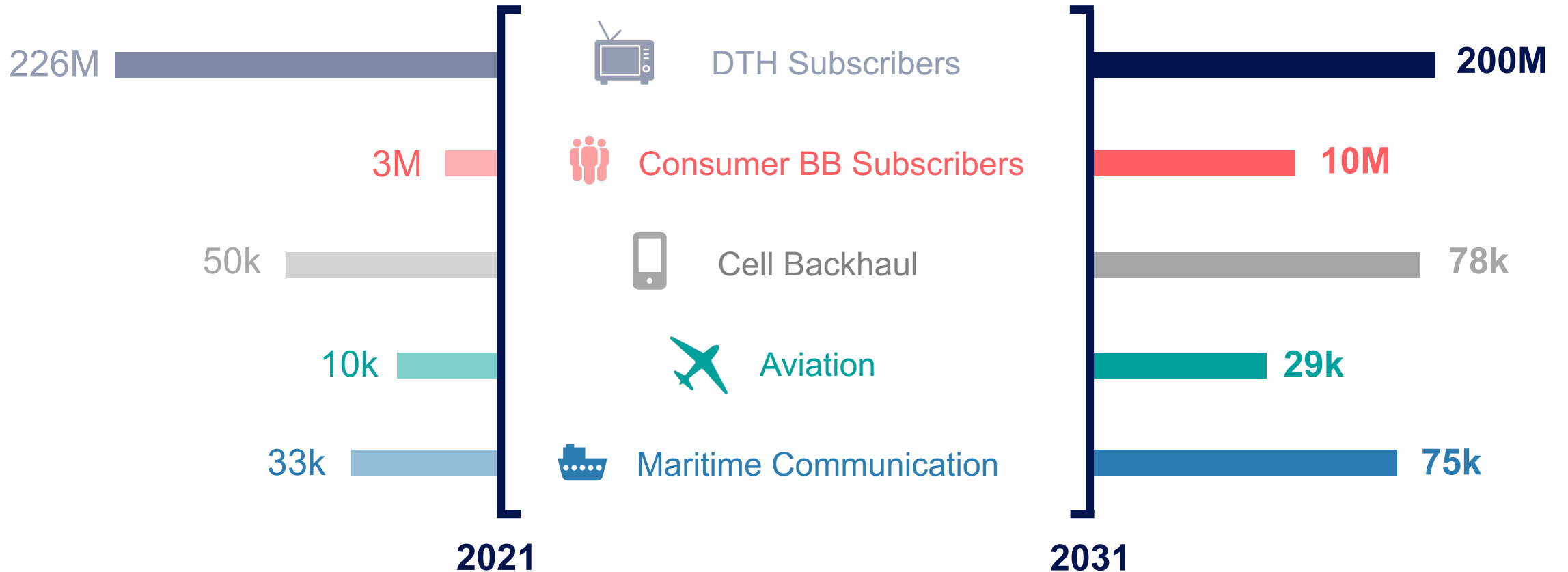


New economics & capacity pricing

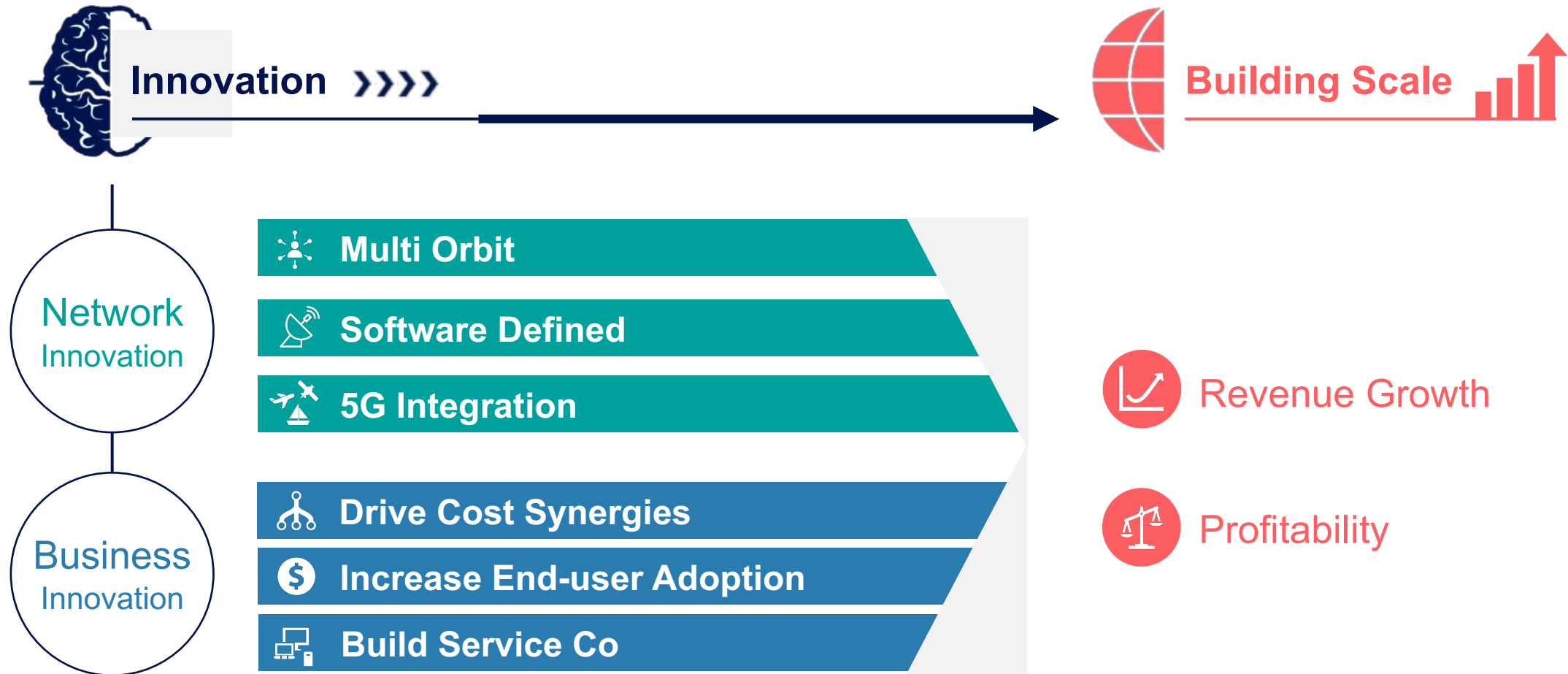
Source: Satellite Connectivity and Video Market, 2022 edition

What is next: increasing market adoption

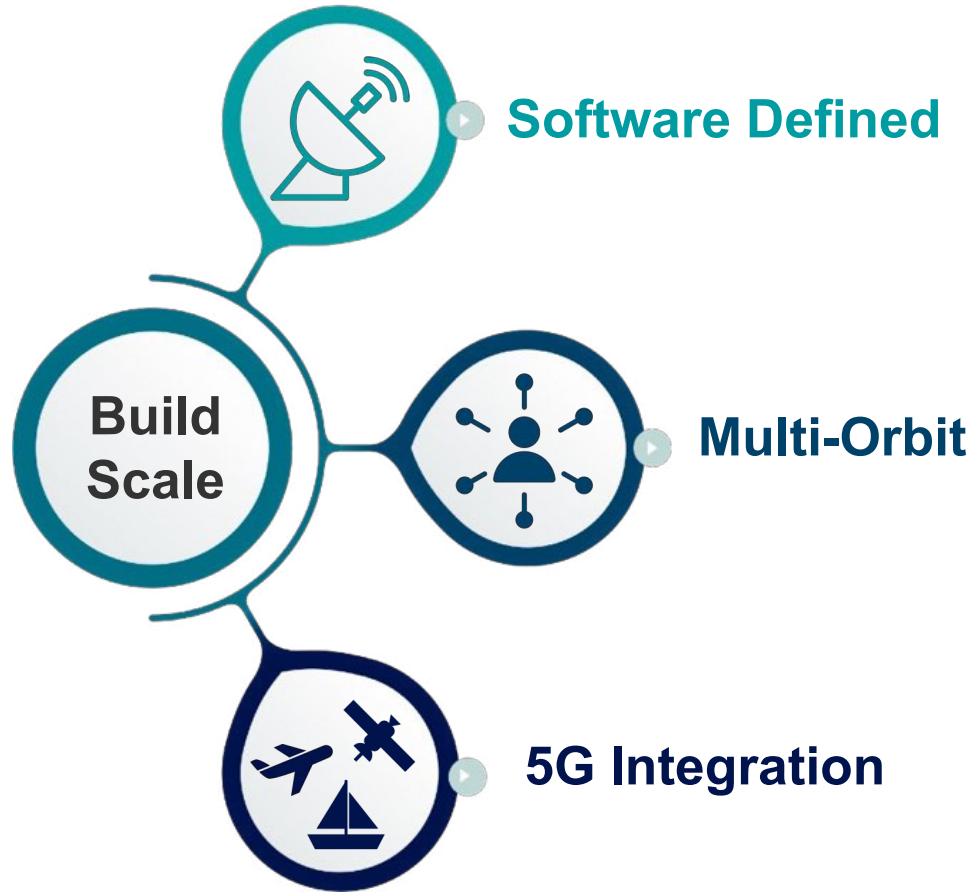
Potential upside: direct to cell phone, micro data centers, autonomous vehicles



The Roadmap Ahead



Networks innovation building scale



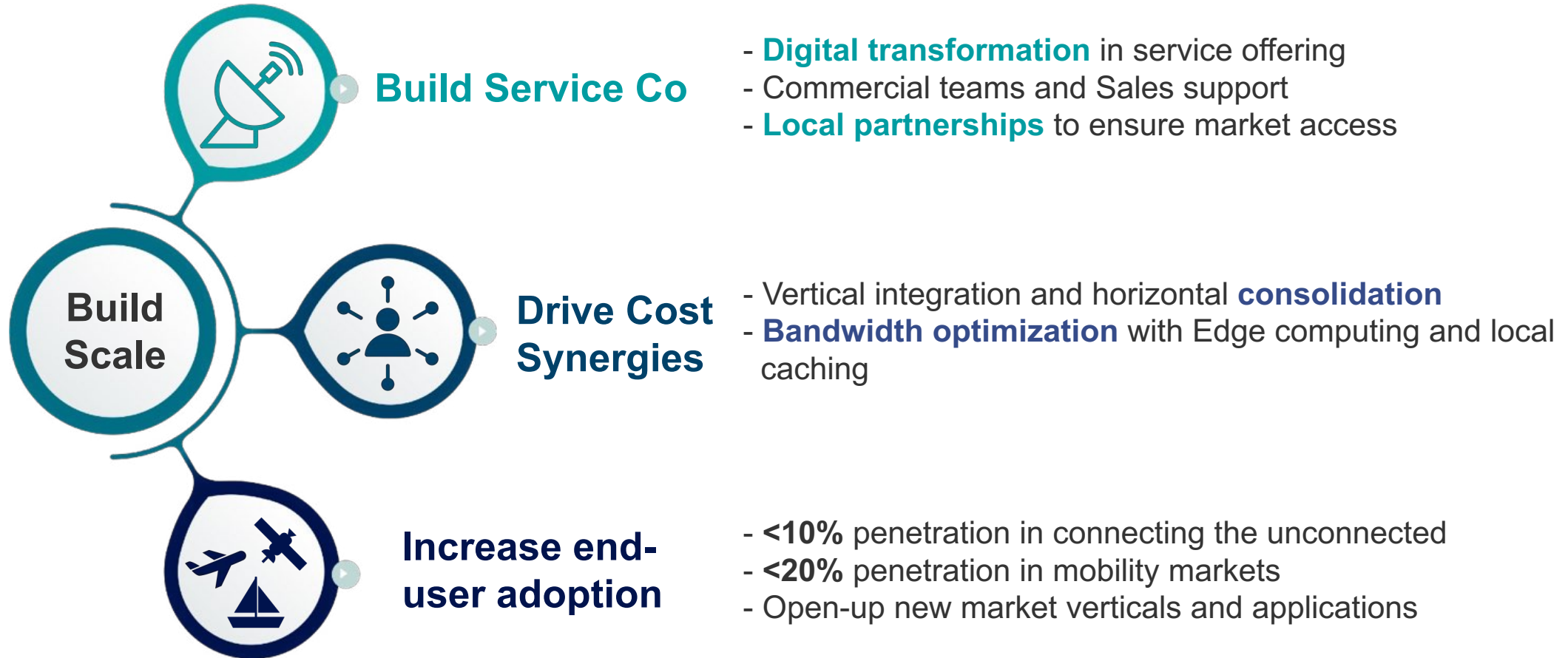
>70% of GEO satellites ordered in 2021-22
~All future / 2nd generation broadband NGSO constellations
SD ground segment in the starting block

~90 Tbps of global capacity supply by 2027
Need for fully deployed and compatible **ground infrastructure** to effectively use

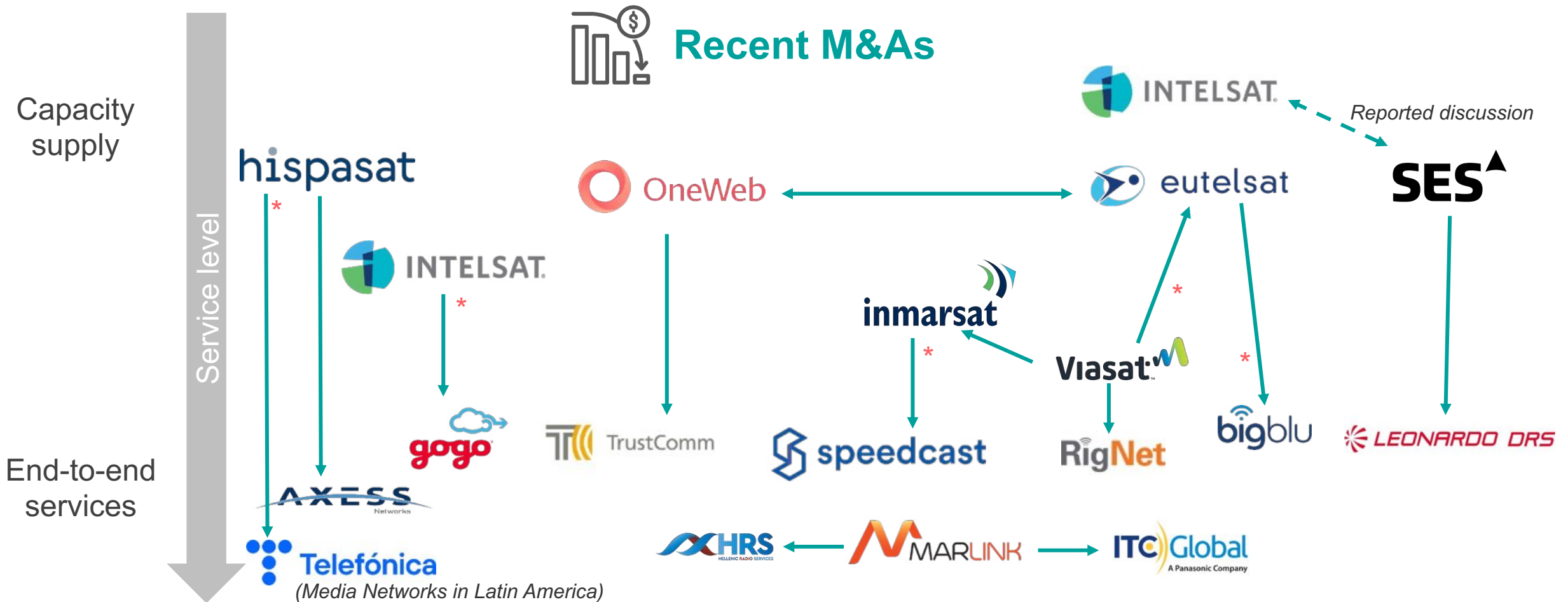
Strategic partnerships with **cloud providers**

Standards: Contribution to standard definition and trials for seamless integration

Business innovation building scale



The consolidation trend: sample of M&A transactions (closed & on-going)



What to expect in the coming 25 years

Race for higher data mgt & transmission will continue

Fully meshed space and ground architectures

Mass manufacturing vs. sustainable space



Lunar Communications

Min 3-4 cycles of deep transformation of space companies

Metaverse, automation of human activities developing

Thank you

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