

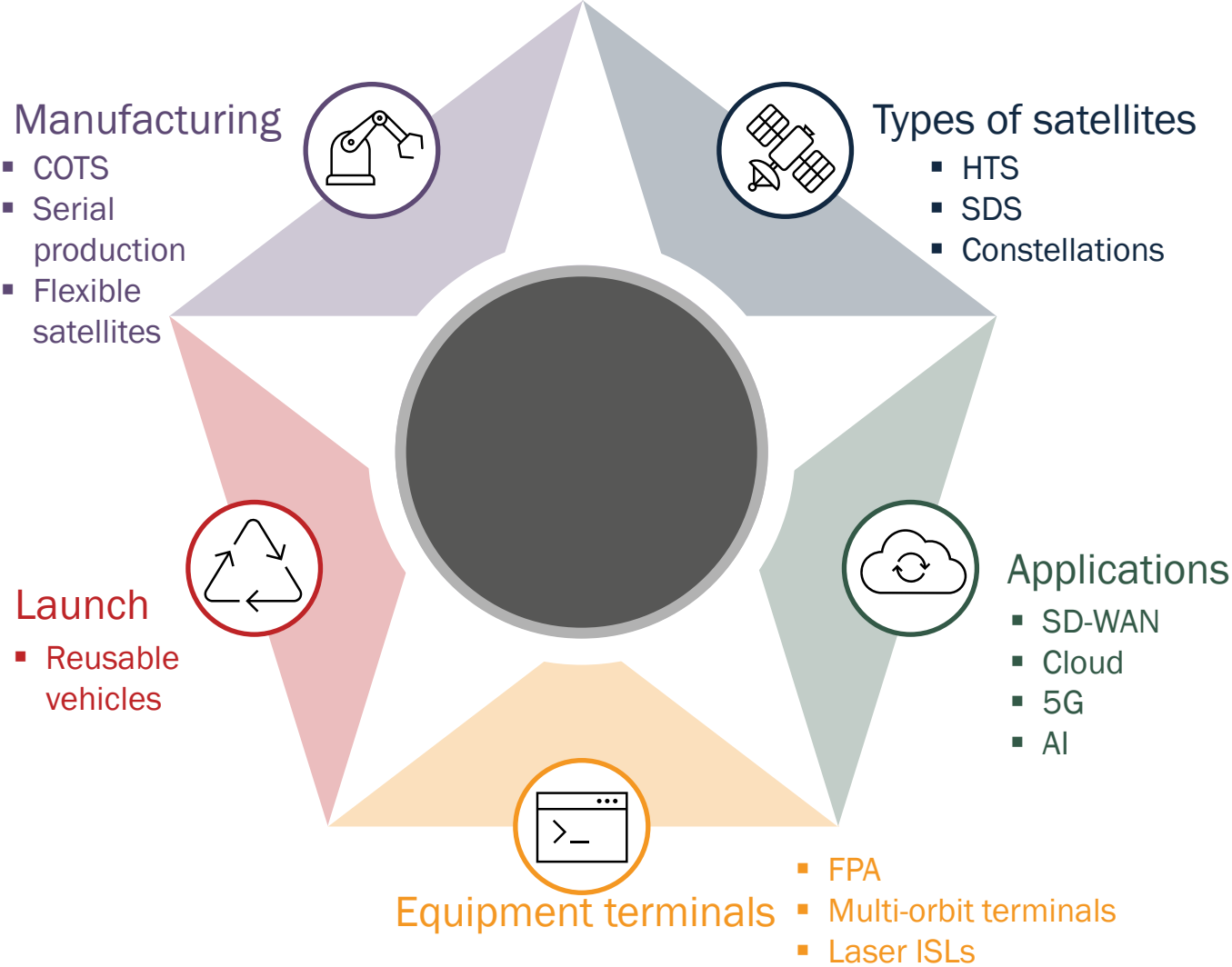
# Most promising satellite and satcom technologies



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# Technologies affecting the space (satcom) industry



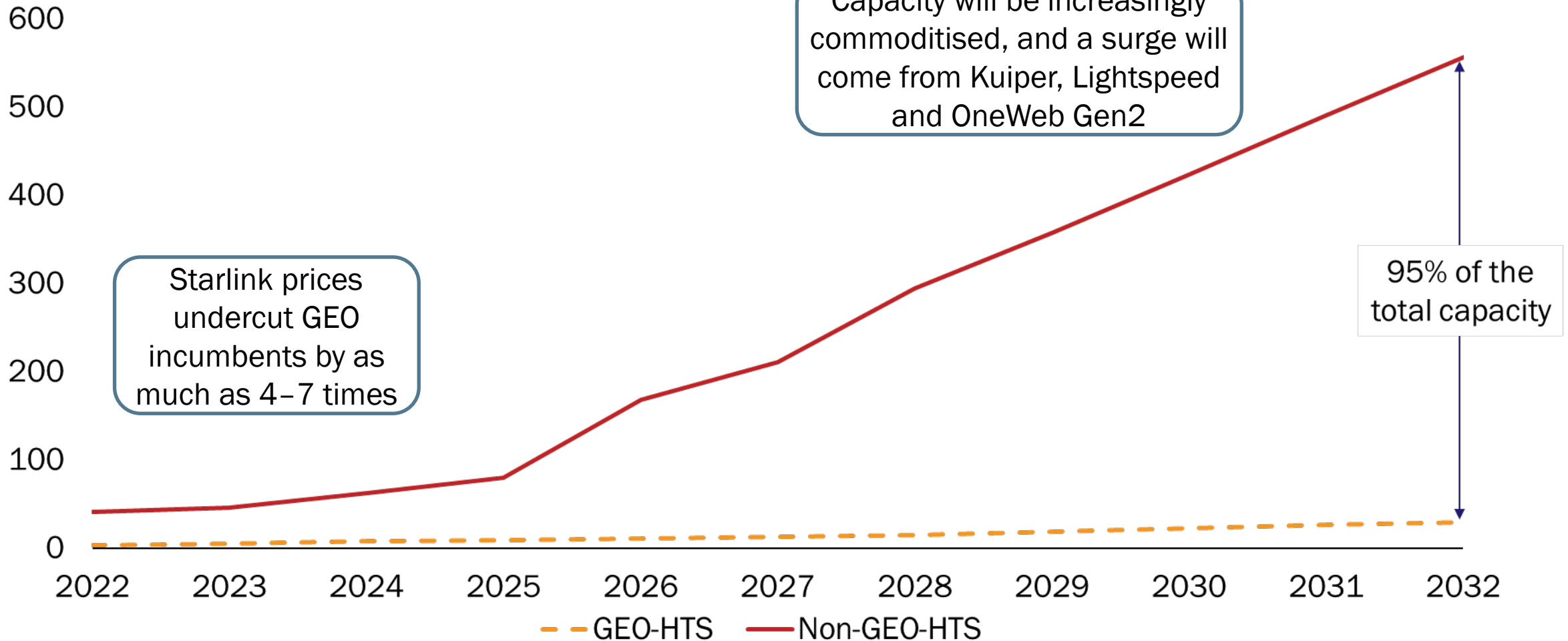
Two areas will continue to be important

↑ Increasing bandwidth/supply

↓ Reducing cost

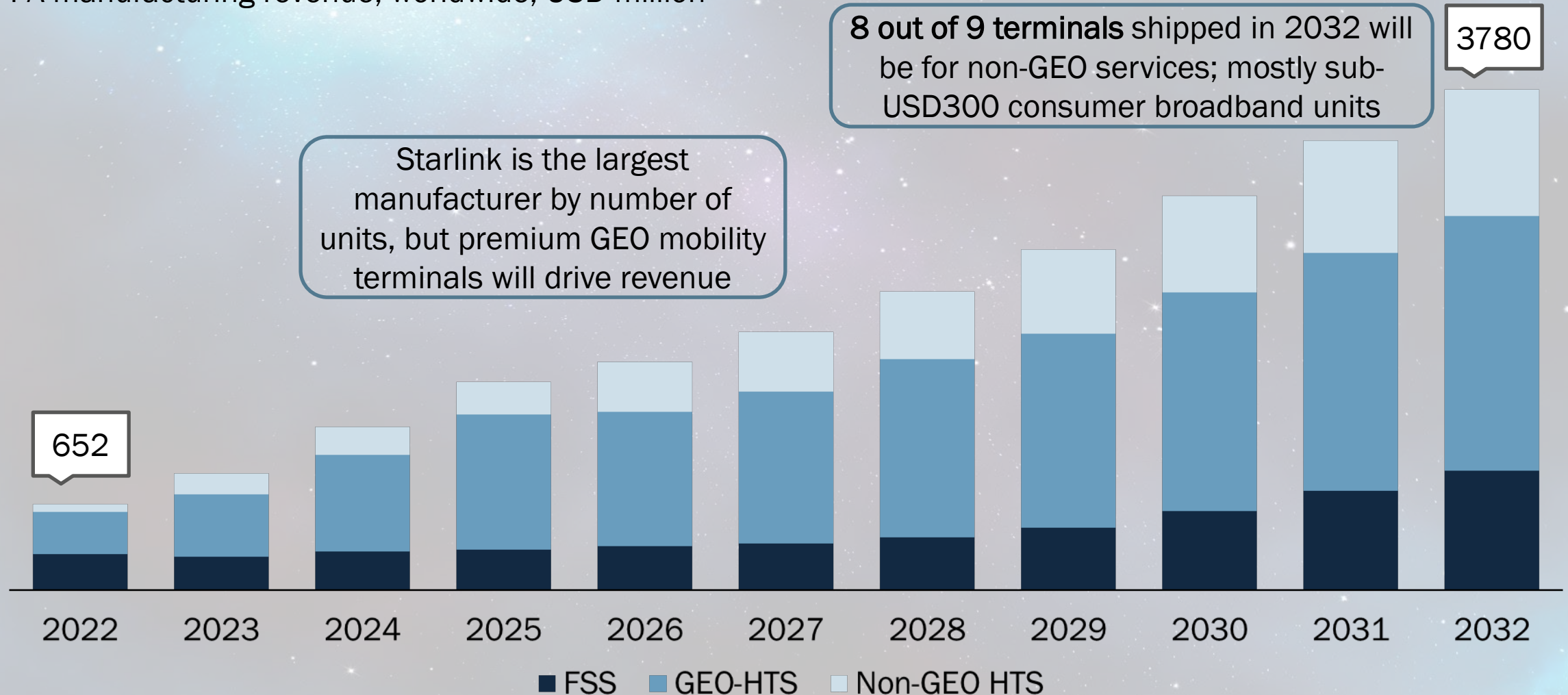
# Non-GEO constellations are transforming the industry at an unprecedented pace

HTS capacity, worldwide, Tbit/s



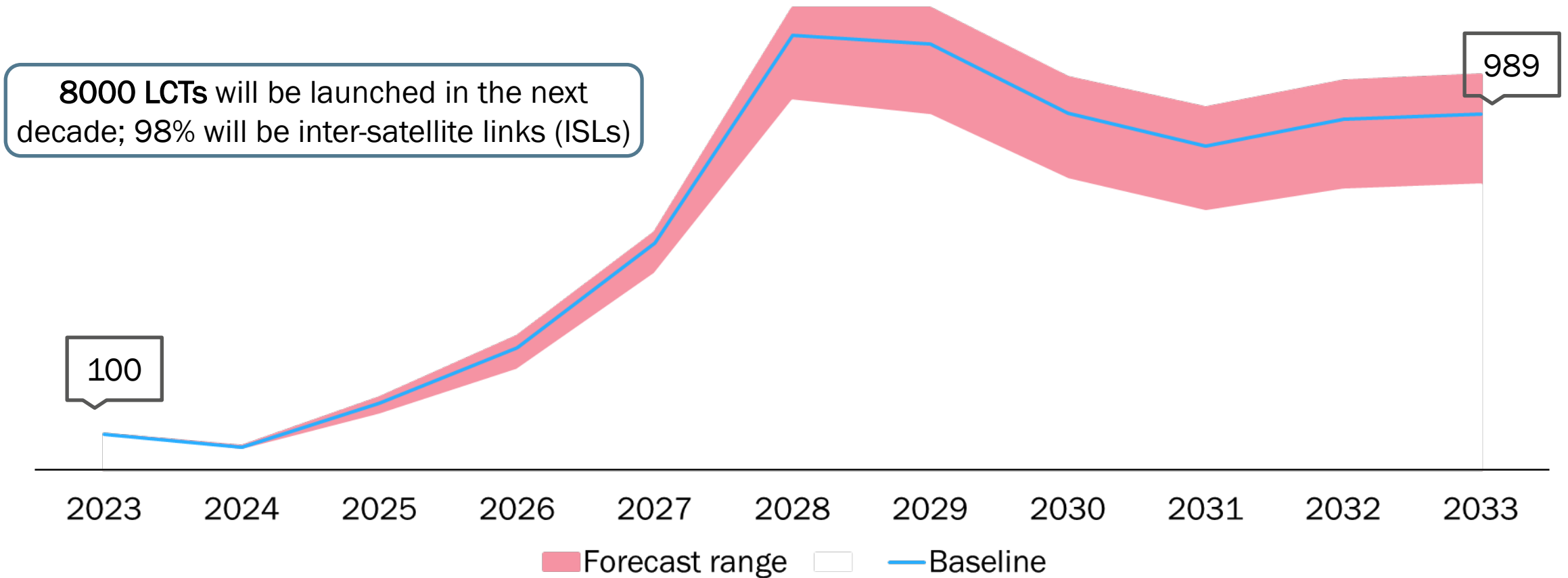
# The development of low-cost flat-panel antennas (FPAs) has contributed to the success of non-GEO operators

FPA manufacturing revenue, worldwide, USD million



# Laser communication terminals (LCTs) will transform inter-satellite links

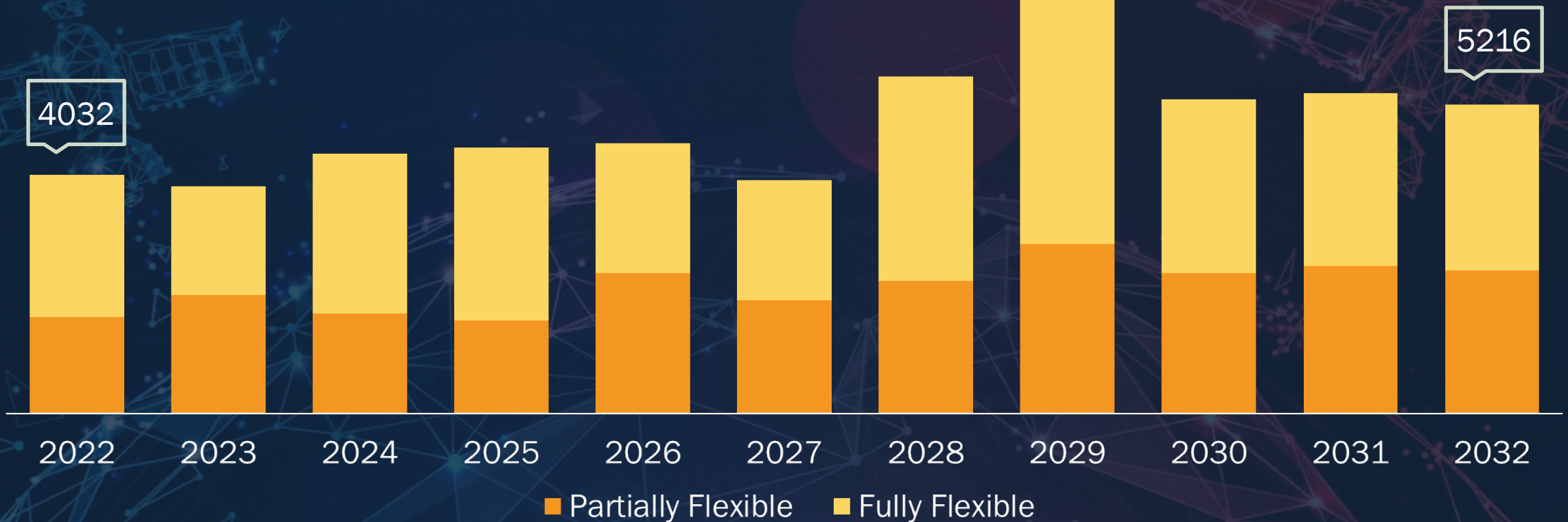
Satellites launched with LCTs



# Software-defined satellites are the future for GEO operators

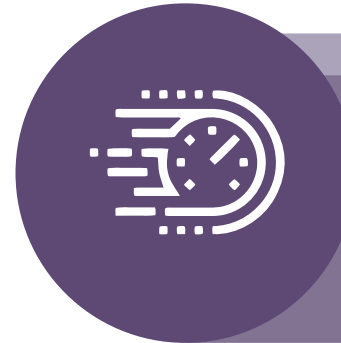
Manufacturing revenue (USD million)

89% of all communications satellites built in the next decade will feature some software-defined capability; aggregating **USD 54 billion** manufacturing opportunity



# Artificial intelligence in satcom

- AI integrated with flexible payload capabilities can lead to significant bandwidth and cost optimisation opportunities.
- In an increasingly competitive ecosystem, this could be a game-changer for a satellite operator or service provider.
- Capacity time-series forecasting, recently available from Amazon Forecast, helps the operator plan bandwidth demand – improving utilisation and customer satisfaction.
- The focus for AI should be on improving data processing speed and accuracy, within the constraints of on-board computing.



## Phase 1: trials (present – 2027)

- AI use cases in initial stages (mostly EO)
- Focus on improving internal processes



## Phase 2: expansion (2028 – 2030)

- AI applied across satcom applications
- More customer-facing



## Phase 3: deployment (2030+)

- AI deployed in most space and satellite segments
- Both internal and client use cases

# Questions and answers





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