

The global voice of the satellite industry

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CTU
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The global voice of the satellite industry to promote common interests at national, regional & global levels.

2002 - 2013

Europe

2014 - 2021

EMEA

2022

Global

GSOA Members



29 operators | Global and Regional | CEO-driven











Space technologies enable connectivity

Global Future Council on Space Technologies

BRIEFING PAPER
SEPTEMBER 2020

WORLD
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FORUM

Examples of benefits

	Applications using satellite communications, Earth observation and navigation enable a sustainable, inclusive, digital society		+70% In times of adverse global events such as COVID-19, satellite broadband connections have seen a 70% increase across Western Central Europe and Latin America
	49% communications: Satellite comms can help connect the 49% of the world's unconnected population		Satellite communications contribute to every Sustainable Development Goal, either directly or indirectly
	5G Connectivity: Satellites extend the reach of terrestrial networks enabling 5G on a global scale		Broadcast: Satellites provide live, global coverage of world events and transmission of real-time information
	Security: Governments worldwide often rely on satellites for secure communication		+M Multicast: Satellites can enable software and firmware over-the-air updates for millions of connected vehicles and devices

7

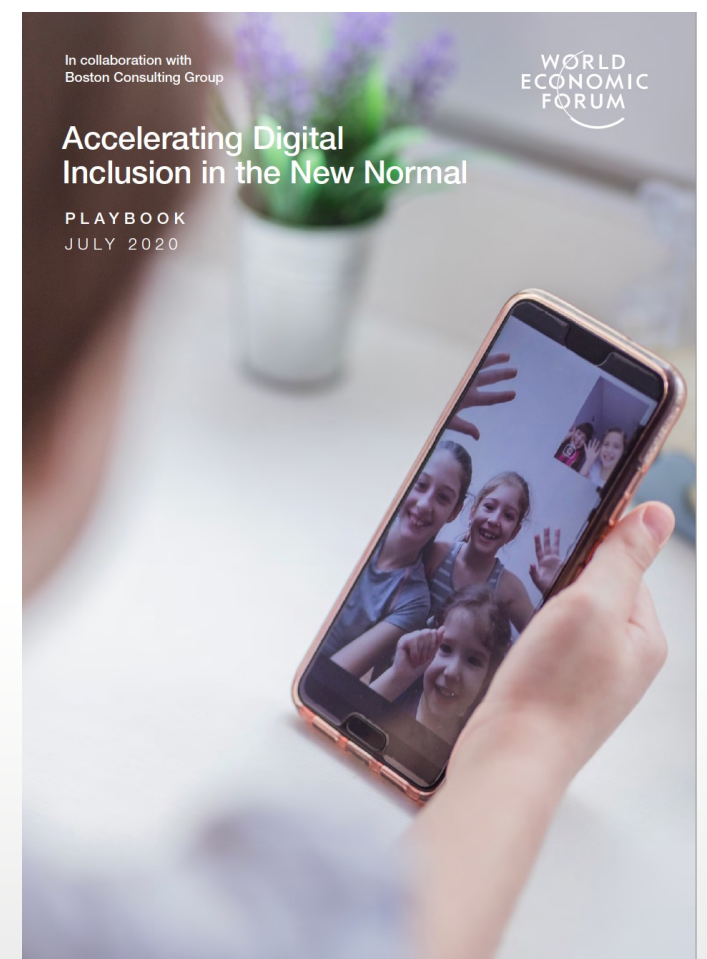


Global Future Council on Space Technologies 2019-2020

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Six ways space technologies benefit life on Earth

BRIEFING PAPERS
SEPTEMBER 2020



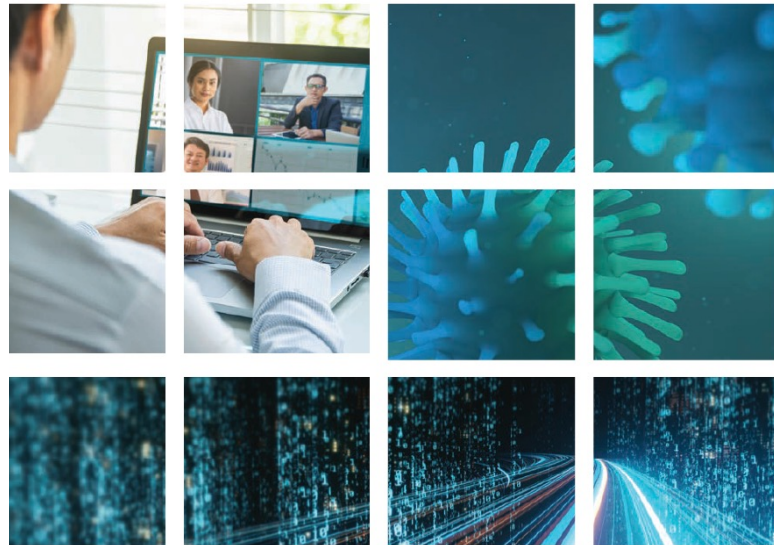
In collaboration with Boston Consulting Group

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Accelerating Digital Inclusion in the New Normal

PLAYBOOK
JULY 2020

Guide to develop a telecommunications/ ICT contingency plan for a pandemic response



The Last-mile Internet Connectivity Solutions Guide

Sustainable connectivity options
for unconnected sites
2020



Satellite COMMUNICATIONS

for Early Warning, Environmental Monitoring & Climate C



Year on year, humanity suffers devastating consequences of natural disasters and a rapidly changing climate that steals lives and livelihoods from millions around the world. In short, our vulnerabilities are increasing, and the risks are fast, that many things are beyond our control.

The use of satellite imagery to monitor large scale changes to the planet is well understood and the role of satellite communications, however, is less well-known, but of equal and increasing importance.

Global Challenges | Satellite Answers

www.esoa.net

Satellite COMMUNICATIONS and the Future of Agriculture



The agri-food system is under pressure to achieve the UN Sustainable Development Goal (SDG) of a "world without hunger" by 2030. It is being impacted by from all sides by digital technologies, changing consumer preferences, e-commerce, climate change and other factors.

Digitisation is key for farmers to react, adapt and survive in an increasingly complex world, enhancing their productivity and making them more competitive and ultimately making the entire food system more resilient. *Satellite communications* play a crucial role in this process.

Global Challenges | Satellite Answers

www.esoa.net

SPACE SUSTAINABILITY The Time to Act is Now



The use of technology to drive solutions to social and environmental challenges has expanded the role of space-based services. The importance of these solutions is such that social and economic functions and stability fundamentally rely on a host of space-based services for which there is often no alternative.

The increased interest in space and pace of launches in recent years highlights the need for action to deal with space debris and collisions and to ensure space remains sustainable and accessible for all.

Global Challenges | Satellite Answers

www.esoa.net



A GLOBAL INITIATIVE

Relevant Outputs from Cooperation with NGMN (Mobile operators)

GSOA VISION: Satellite In The Networks Of Tomorrow

GEO

MEO

LEO

MULTIPLE
SATELLITES

MULTIPLE
CONSTELLATIONS

MULTIPLE ORBITS

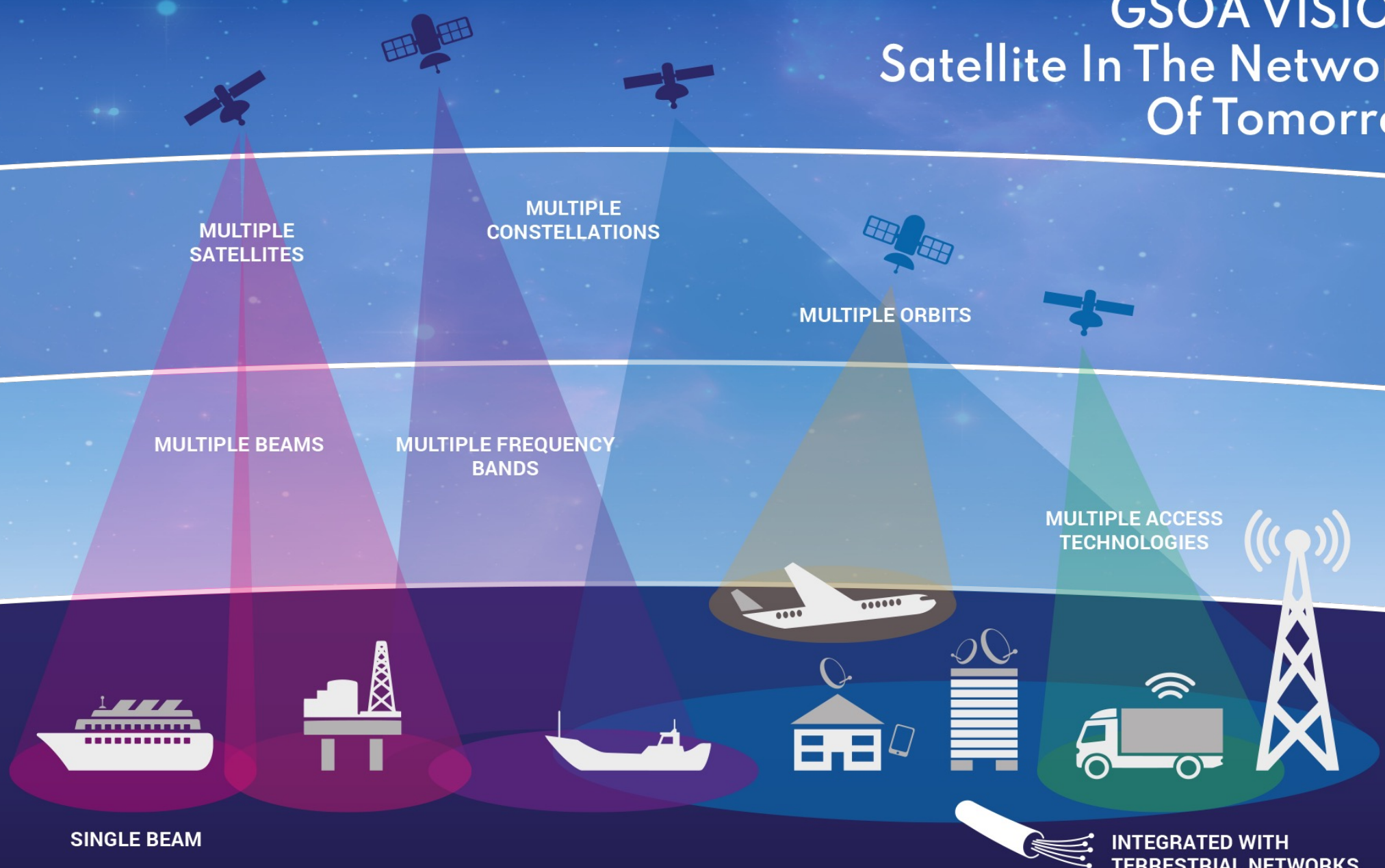
MULTIPLE BEAMS

MULTIPLE FREQUENCY
BANDS

MULTIPLE ACCESS
TECHNOLOGIES

SINGLE BEAM

INTEGRATED WITH
TERRESTRIAL NETWORKS



Changing Economics of Satellite Industry

Demand

Increasing need for universal broadband connectivity

- ⇒ Digitisation & demand for access to data is exploding
- ⇒ Pandemic & “Building back Better with Broadband” to achieve SDGs
- ⇒ Connectivity on the move (aero, maritime)

Rapidly evolving government policies & investment landscape for connectivity

Supply

Technology advancement is driving down costs:

- ⇒ Lower production costs & different designs mean that more can be done with a smaller form factor
- ⇒ Lower cost to launch & increasing choice of launchers

Lower barriers to entry - more systems being launched



The Ever-Increasing Role & Importance of Satellite



Essential Mobile Services



Satellite enabling community WiFi



Satellite broadband solutions enabling 100 mbps in the USA

Cellular backhaul for rural mobile stations



Diverse, flexible, cost-effective solutions to extend connectivity

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