



Workshop on the Status and Evolutions of the Satcom Market

ARTES 1

20th and 21st of January 2010
Space Expo, ESTEC

The Telecommunications and Integrated Applications directorate of ESA has always paid close attention to the evolution of the satcom market, especially during this period of economic decline where proper analysis of the marketplace is critical. From such a rigorous analysis, it is possible to predict the evolution of the satcom market with more accuracy. This valuable information is used to further develop and increase the competitiveness of the European and Canadian satcom industry.

ESA has investigated recent events and the present status of the market to discover future potential business opportunities. Through a series of different activities within the ARTES 1 element, ESA has established:

- i) paths for the evolution of the ground segment that will improve the competitive edge of industry;
- ii) new upcoming markets and business possibilities;
- iii) an assessment of the Chinese and Indian competitors and market;
- iv) a forecast of the evolution of satcom markets;
- v) the impact of the ARTES programme (period 2000-2005).

ESA would like to invite you to participate in a two-day workshop where the results of the following ARTES 1 activities will be presented:

1. Satcom Market Monitoring
 - a. Initial study
 - b. First update
2. Assessment of Impact of ARTES programme
3. Use of Satellite Triple Play Services in Emerging Countries
4. Two-way Satellite Market Survey (I)
5. Two-way Satellite Market Survey (II)
6. Survey of Chinese and Indian Telecom Space Industry and Market
7. Emerging Markets and Future Applications

After the sessions on the first day, a reception hosted by ESA will take place in ESTEC to offer attendees an opportunity to network in a social setting.

During this workshop, you will have the opportunity to network with other industry partners as well as with ESA staff and members of the national delegations.

Day one of the workshop will consist of four sessions. The first double session reviews the activity *Satcom Market Monitoring*. This is an ongoing study to

monitor and predict the evolution of the overall satcom marketplace. This session is a great opportunity to catch up with all of the changes that have occurred in the world of satellite communications. It begins with the Initial Study (finalised September 2008) which assesses the market at the beginning of the recession period. The second part reviews a follow up that has tracked the evolution of all the changes that have occurred during the last year and will predict the evolution of the market for the coming nine months.

The first afternoon session presents the results of the *Impact Assessment of the ARTES Programme* on the European and Canadian satcom industry. The study evaluated how the ARTES programme contributed to improving the competitiveness of the Satcom industry from 2000 to 2005 and what benefits have been derived at the different levels of the satellite value chain.

The last session of the first day reviews the study *Use of Satellite Triple Play Services in Emerging Countries*. It gives an interesting insight into developing countries. It presents various business cases for European and Canadian companies to introduce themselves in upcoming and growing markets. It also outlines business practices that differ from those European. This sound perspective is vital to overcome the business boundaries that may exist.

Day two of the workshop will assess the satcom broadband market and will look into new business opportunities as well as potential competitors. It is crucial to know where new opportunities are and it is also important to understand how the competitors develop.

The first two sessions of the second day will present the results of the *Two-way Satellite Market Surveys*, two parallel surveys conducted in the satellite broadband segments. These two surveys analyse all ranges of available products in the market for broadband, from consumer users to maritime. Although both surveys look at the marketplace globally, one pays more attention to Europe where the other centres on North America. A very important element of both surveys is the investigation in the evolution of broadband products and the assessment of technological improvements to boost the business cases of the different user segments.

The third session of the morning reviews the results of the *Survey of Chinese and Indian Telecom Space Industry and Market*. This presentation will introduce the areas of excellence of the Chinese and Indian industries in communication and navigation, their market place and how this may affect the European competitiveness in these markets. It will also identify the areas of cooperation with European industry in satcom and navigation.

The last session of the workshop, *Emerging Markets and Future Applications* makes a thorough investigation of satcom to find out where new marketplace opportunities are. All the parts of the diverse value chain are analysed to spot new businesses, new markets and new applications.

ESA expects the results of this workshop will be valuable to European and Canadian industry and helpful for the development of their business strategies.

This workshop will also provide the opportunity to give ideas and suggestions for further ESA actions, where support is required and where satcom market investigations and/or developments are needed.

Attendance to the event

Please register to this event in the following link:

https://participants.congrex.com/scripts/jmevent/Registration.asp?Client_Id='CXNL'&Project_Id='09M47'&Form_Id=1&Form_Number=2&Stand_Id=0&A=&Language_Code=&template_id=

The number of participants in this workshop is limited to 100 people, we advise to register the soon as possible for this event.

The workshop schedule is as follows:

Day	Time		Presentation
	9:30	10:00	<i>Registration and welcome coffee</i>
	10:00	10:30	<i>Introduction</i>
	10:30	11:45	Satcom Market Monitoring Initial study (Euroconsult, Paul Britten)
	11:45	12:45	Satcom Market Monitoring First update (Britten Consulting)
	12:45	13:00	<i>Q&A</i>
	13:00	14:00	<i>Lunch</i>
	14:00	15:00	Impact Assessment of ARTES programme (Euroconsult)
	15:00	16:00	Survey of Chinese and Indian Telecom Space Industry and Market (SpaceTec Capital Partners GmbH)
	16:00	17:00	<i>Discussion and Wrap up</i>
	17:30	19:30	<i>Reception networking event</i>
21/01/2009	09:15	09:30	<i>Welcome</i>
	09:30	10:30	Two-way Satellite Market Survey (SSE)
	10:30	11:30	Two-way Satellite Market Survey (Euroconsult)
	11:30	12:00	<i>Q&A</i>
	12:00	13:00	Use of Satellite Triple Play Services in Emerging Countries (SSE)
	13:00	14:00	<i>Lunch</i>
	14:00	15:00	Emerging Markets and Future Applications (DKE)
	15:00	16:00	<i>Discussion and Closing remarks</i>

Check for updates on this workshop at www.telecom.esa.int

Please note that the sessions will take place in Space Expo (beside ESTEC) and the reception in ESTEC. More details provided after registration.