

Satellite Operators:



How Can they Shape the Future in Cellular Backhaul

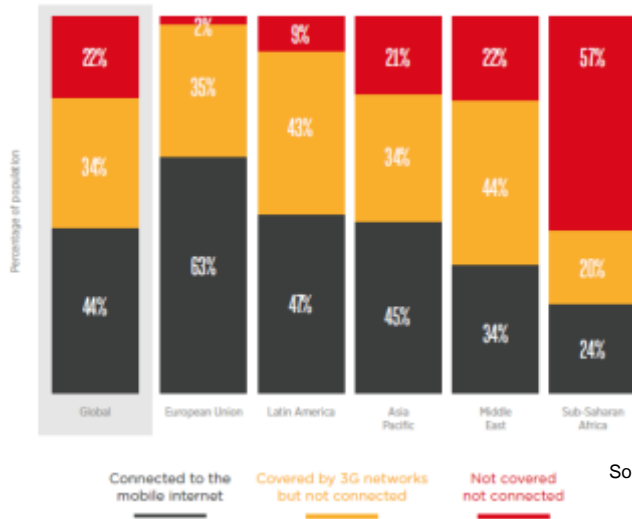
Simon Gatty Saunt

22 June, 2017

Where the demand is coming from?

Large addressable market to cover and 3G/4G data traffic growth

Connected vs Unconnected Population



Source: GSMA intelligence, 2015

Potential Uncovered Base Stations

	Broadband Potential Network Expansion
NAM	1,974
LAM	30,430
WEU	7,230
CEEU	31,942
MENA	34,165
SSA	104,512
ASIA	400,131
TOTAL	610,383

Note: Potential Base Stations
Source: NSR

Global mobile traffic growth by access type




Source: CISCO VNI Mobile, 2017

- ▲ Satellite backhaul opportunity is massive compared to current levels of coverage
- ▲ Emerging regions present largest addressable market opportunities

- ▲ 3G/4G data traffic growth will drive the MNO ARPUs and the satellite bandwidth demand
- ▲ By 2021, 3G/4G/5G will account for more than 99% of global mobile traffic

Where the demand is coming from?

The bandwidth demand revolution



Peak period
bandwidth
requirements
to grow at a 52%
CAGR through the
next five years

Source: ACG Research

Annual global IP traffic
will pass the zettabyte (ZB)
threshold by the end of 2016

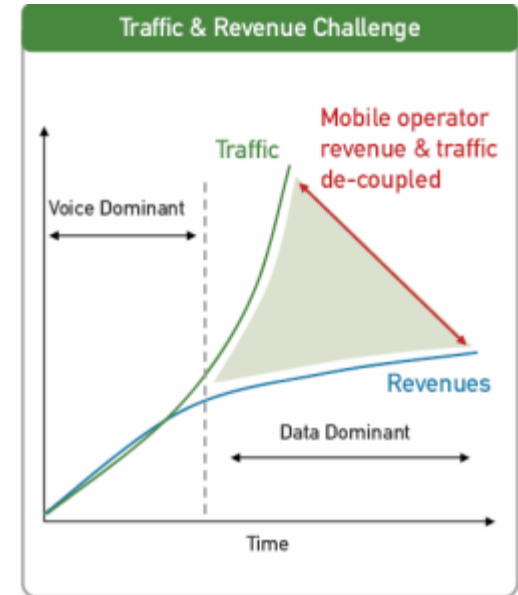
It will reach 2.3 ZB per
year by 2020.

The number of devices
connected to IP networks will be
more than three times the global
population by 2020

Source: Cisco VNI Global IP Traffic Forecast,
2015–2020

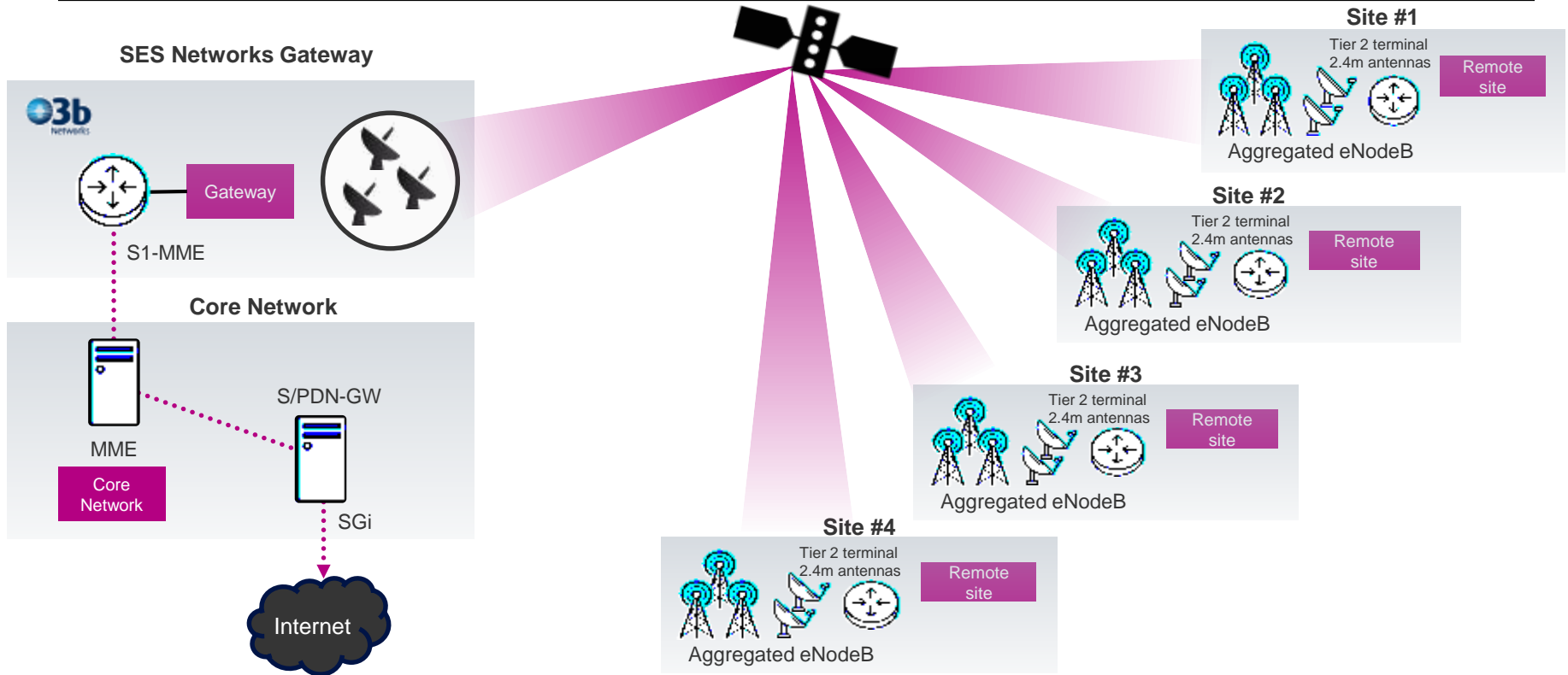
Challenges faced by Telco's & MNOs

- ▲ Obligated to meet the coverage and USO obligations set out by governments
- ▲ Provide LTE Networks
- ▲ Minimize Total Cost of Ownership (TCO)
- ▲ Meet Quality of Experience expectations (network performance).
- ▲ Prepare 5G
 - More than a new generation, it will be very different.
 - Network requirements



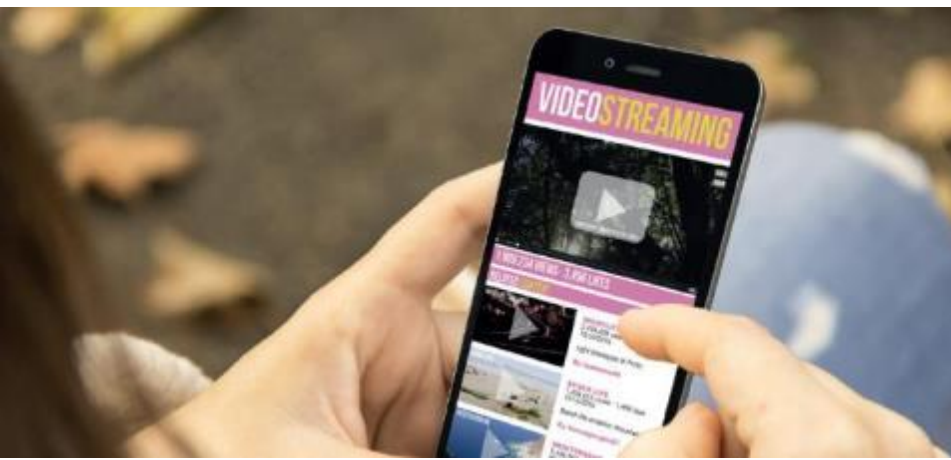
Source: telco2.net

Leading MNOs Pave the Way – MEO Solution using O3b



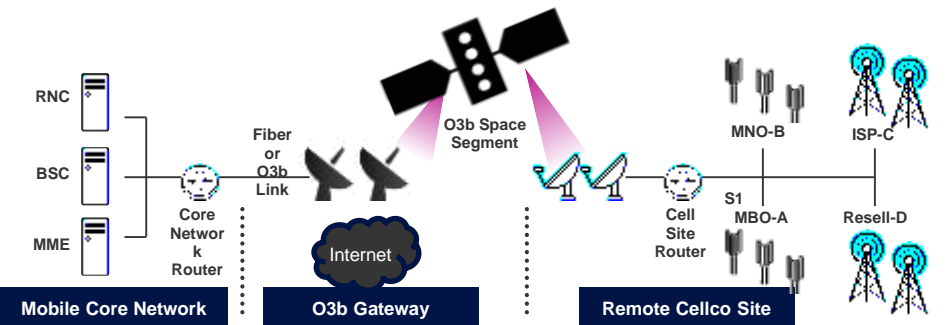
Mobile Network Operators (MNOs)

Fibre-equivalent, satellite-enabled core network and backhaul solutions



Key Features

- Future-proof
- Scalable up to 2Gbps
- 3GPP compliant (<200ms over S1)
- QoS for VoLTE/ViLTE over satellite
- 2G/3G/4G/LTE backhaul combinations
- Up to 99.9% network reliability SLA
- Fully managed service



Benefits

- Industry-leading low latency
- Superior Quality of Experience (QoE)
- Eliminate points of network failure
- Lower network backhaul & O&M costs
- Decrease time to service

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