

Technology Disruptions

Changing SatCom Connectivity business for good



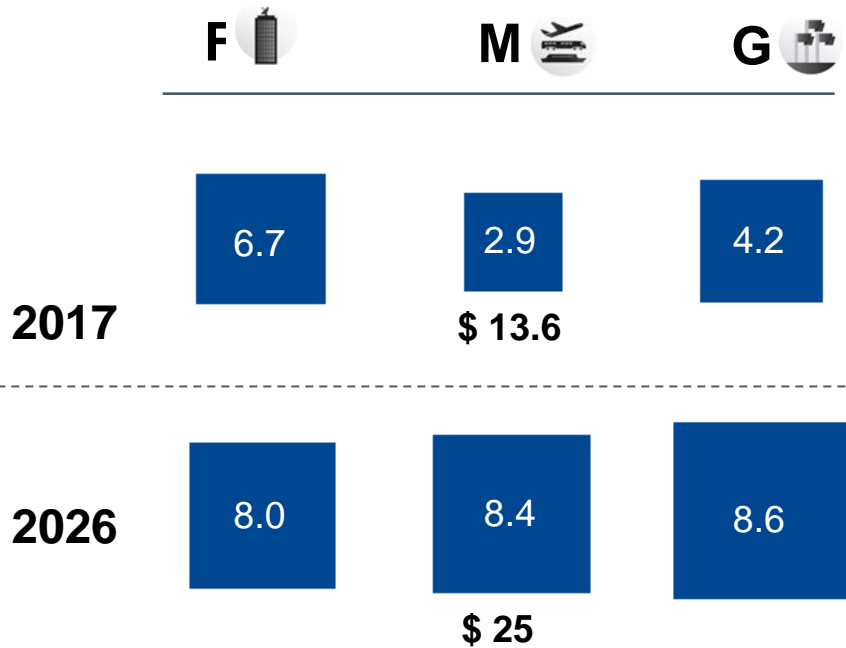
PRESENTED BY
Deepu Krishnan Pillai

PRESENTED ON
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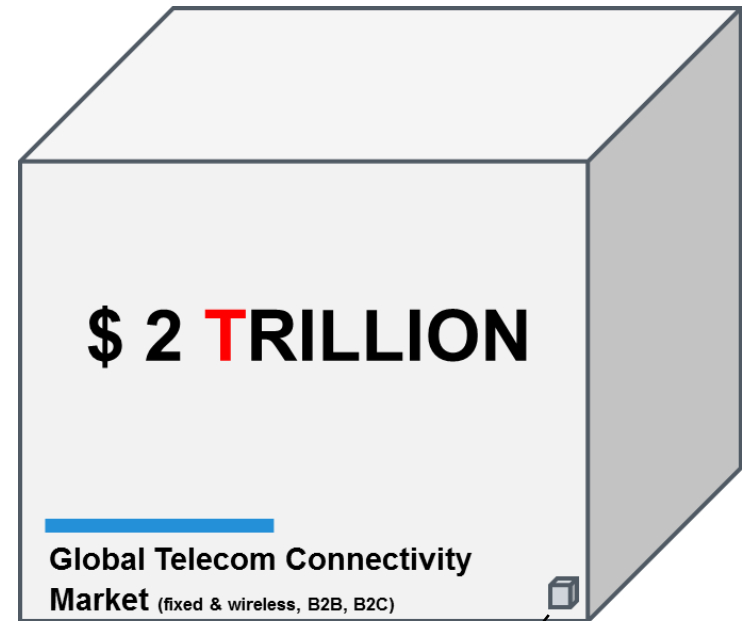
SatCom Sector

First, some context

Growth Outlook Network Revenue(\$US Billions)



Global Telecom vs Global SatCom Connectivity



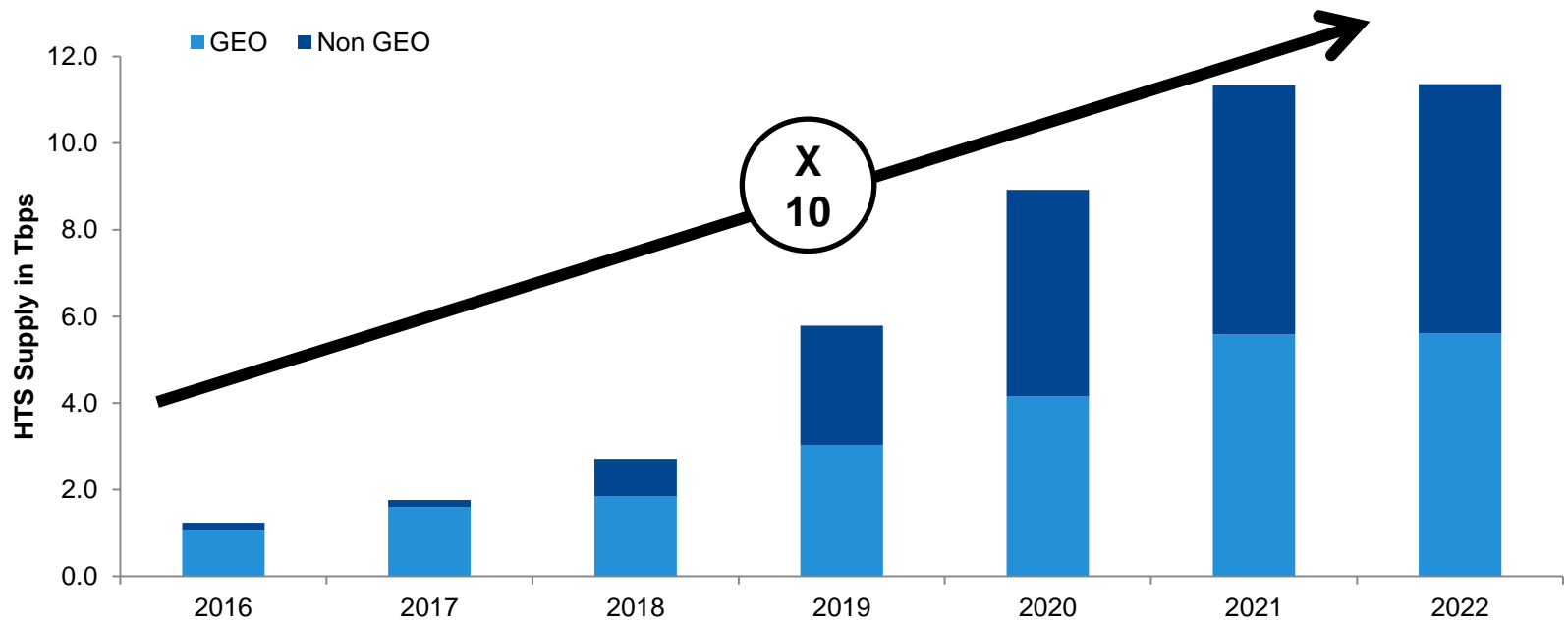
< \$15 Billion

Satellite Communications Sector

▲ Aero to be the single biggest driver of market growth

HTS Supply Evolution

Global bandwidth supply is skyrocketing...thanks to HTS



Note: Non GEO include O3b Current, O3bMpower, OneWeb & Leosat

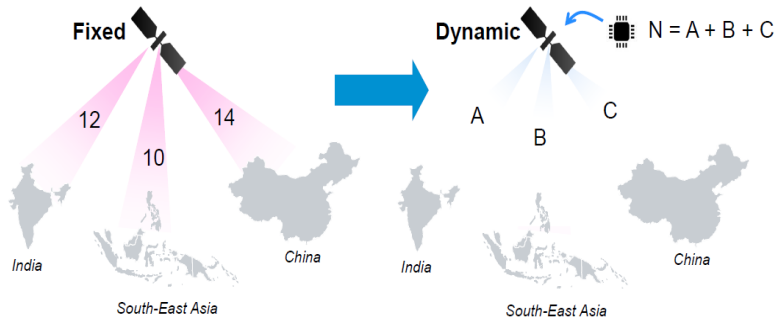
- ▲ Supply to grow more than 10x in next 5 years
- ▲ NGeo HTS supply will catchup with GEO HTS supply by 2020

HTS Flexible payloads

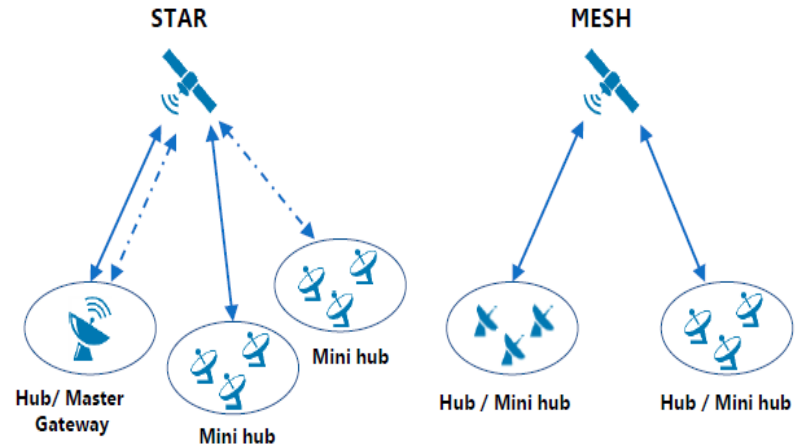
Flexibility to protect against uncertainty in demand

Dynamic capacity allocations with digital processing

Advantages of digital processing



Gateway- STAR, MESH or HYBRID



- ▲ Flexibility in allocating capacity from one beam to another
- ▲ Can quickly respond to changes in demand

- ▲ Hybrid architectures can meet different application requirements

Flexibility can be in Coverage, Power allocation, Frequency, Bandwidth Allocation and Network Connectivity

Ground Segment Innovations

New terminals under development

mPower – Investing in Technology partners for ground infrastructure innovations



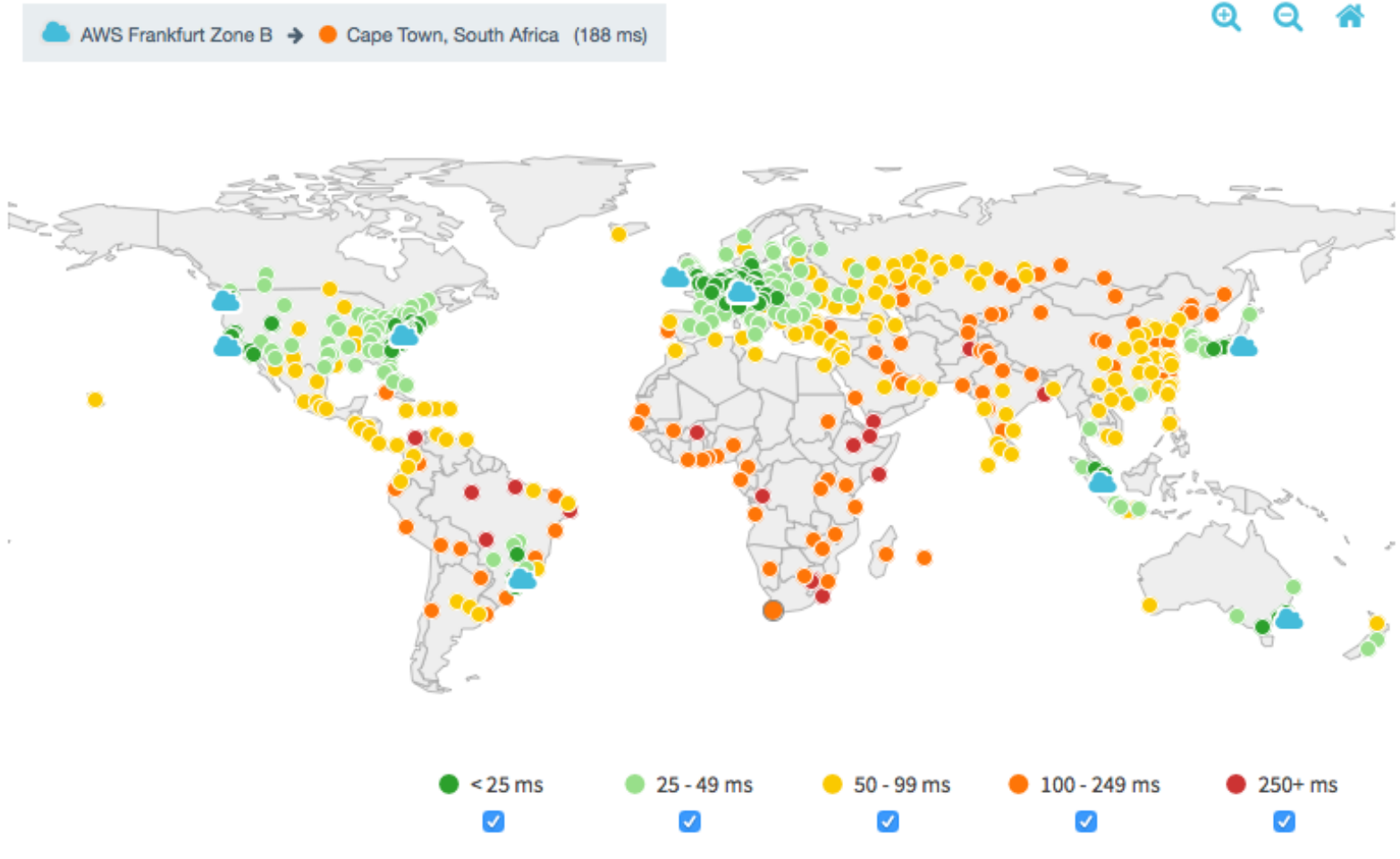
Application specific antennas

- ▲ Storage, Computing and Routing resources with software intelligence
- ▲ Smaller, faster and Easier to deploy

Ground segment to be a key Protagonist in disruptive projects

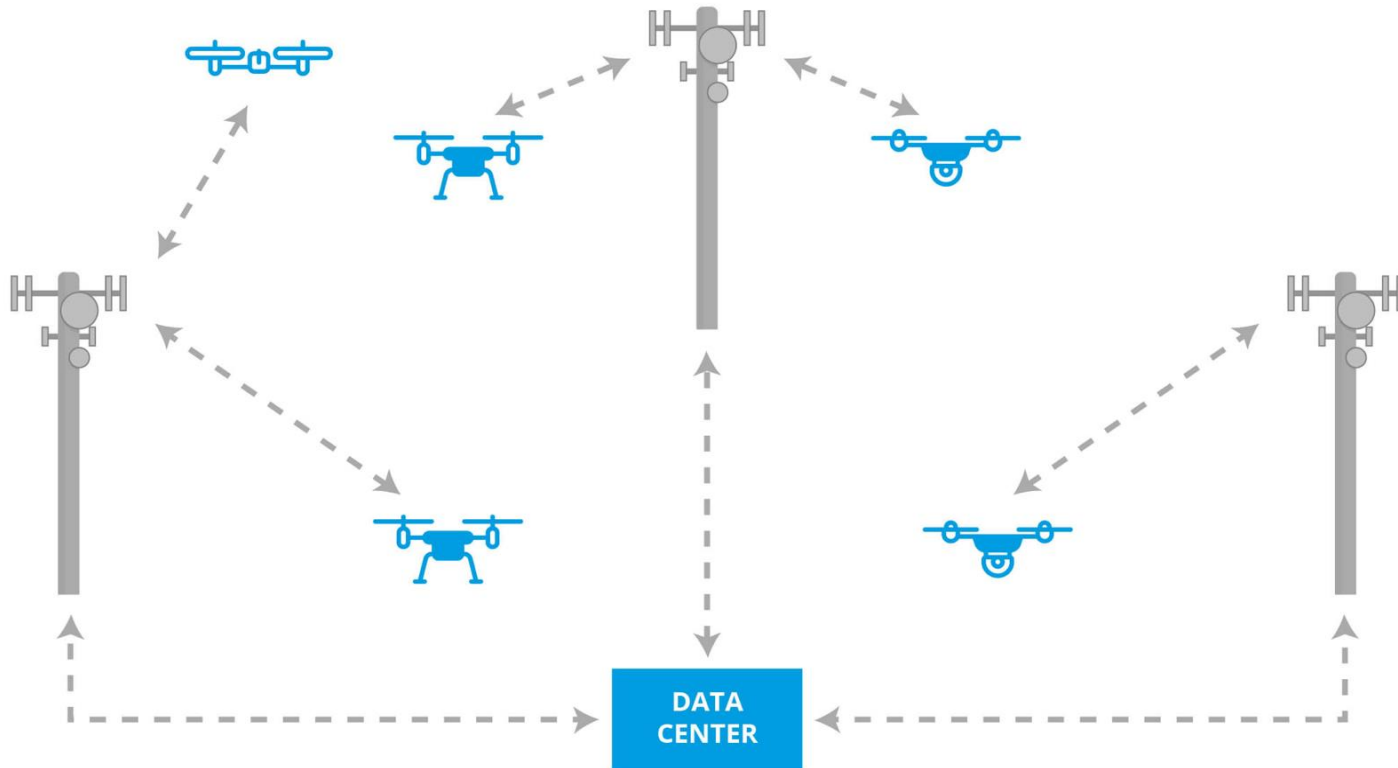
SatCom-Enabled Segments: Cloud

..yet developing world latency remains a serious bottleneck



SatCom-Enabled Segments: Defense & Security

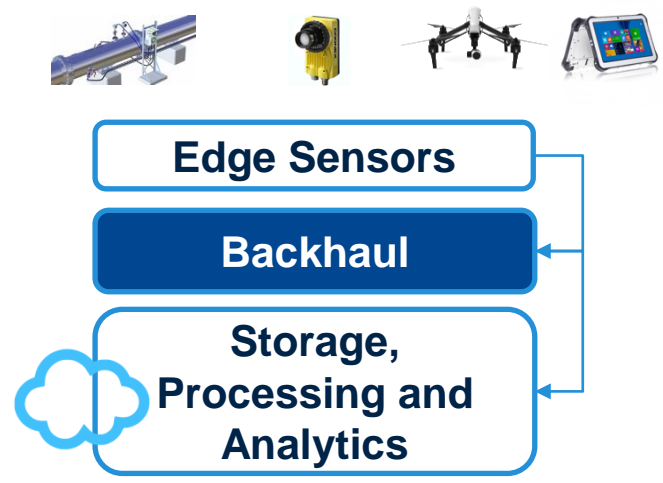
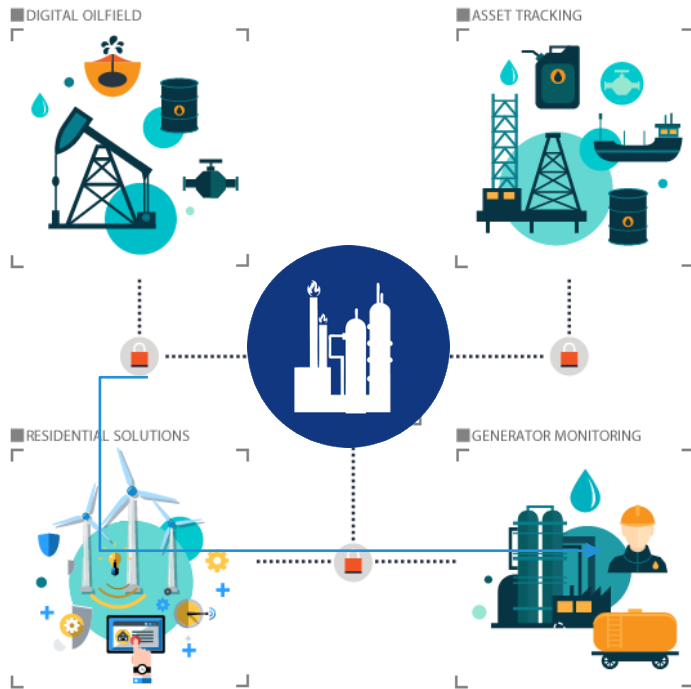
Smaller drones will be pervasive – presenting multipoint backhaul requirements



SatCom-Enabled Segments: Energy



The Digital Oilfield is a real success story - IOT & Cloud allow OpEX savings



50% of oil and gas companies plan to *spend more* on **digital technologies** over the next 3-5 years.

O3b mPOWER

10 to 25x improvements versus current systems



MULTI-TERABIT CAPACITY

ULTIMATE FLEXIBILITY



GLOBAL COVERAGE

100% PRODUCTIVE

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