



European Satellite Operators Association

Global Communications via Satellite

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(ESOA)

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What is ESOA?

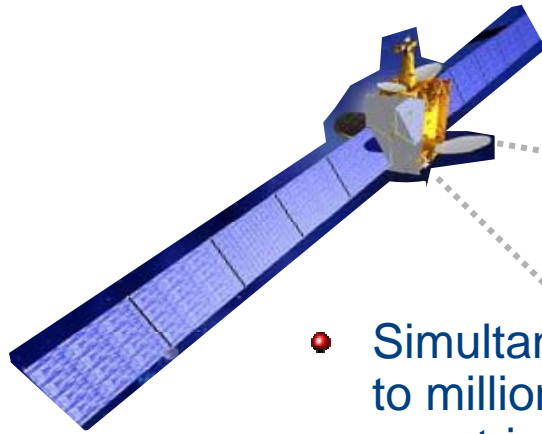
- ESOA represents ALL European satellite operators who operate 90 satellites worldwide
- The Association works with policy-makers to ensure that satellite technology and services are taken into proper account in the delivery of public sector objectives so citizens all over the globe can benefit from them
- The availability of satellite services depends on political support, a favourable regulatory environment, a fair industrial policy and awareness
- The Members of ESOA are:





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One Satellite can see & serve one third of the globe



- Simultaneous service delivery to millions of users in many countries through a single integrated infrastructure
- No physical connection needed; wireless connectivity
- Immune to events that disable terrestrial cable & cellular networks: often used for emergency communications





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An Example of Satellite 'Footprint'



- All countries under the satellite beam can receive a signal & services: **technically and naturally** they are open to satellite services
- Satellite operators depend on open markets & this unique feature to enable worldwide service to nearly every community on Earth
- Some governments impose regulations to keep markets closed to 'foreign' satellites



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Some Barriers to Offering Satellite Services

- Discriminatory Licensing Procedures
 - ⇒ burdensome requirements, high regulatory fees, &/ or applied only to foreign satellite operators
- Local Presence Requirements
 - ⇒ requires foreign satellite operators to establish a national company
- Monopoly Treatment
 - ⇒ prevents foreign satellite operators from accessing the market directly & obliging them to sell through the incumbent operator
- Invoking Security Concerns
 - ⇒ fears that undesirable customers might transmit over foreign satellites &/ or might not be controllable
- Some countries/ groups have recently overcome these barriers, including Cariforum, Ukraine (new WTO member) and Vietnam



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Trends in Markets for Satellite Services

The world has seen a general telecom liberalisation over the last 10 years but we still see three types of satellite markets:

1. Those *countries with their own satellite programmes* who wish to protect them
2. Those countries who want to control completely the type and the content of the services
3. Those *countries who allow all satellite operators to serve their markets*

⇒ All of them will benefit from open markets:

- ⇒ Whether in developed or developing countries, many people remain unconnected – satellite connectivity often is their only communications link
- ⇒ Established satellite operators are often involved in extensive & innovative development projects
- ⇒ National satellite systems are generally designed to illuminate more than national territory - open markets allow all operators to serve multiple countries, & benefits users with competitive satellite capacity & services
- ⇒ National governments have full control on licensees authorized to provide telecom services in country



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Benefits of Open Markets

- Best prices & maximum choice of products for consumers
- Competitive domestic market & healthy environment for innovation drives a country's growth in the sector & generates efficiencies that spill into other sectors as well
 - E.g. In Europe a variety of digital TV platforms exist & satellite has a good share complementing terrestrial operators especially in rural & mountainous regions. Satellite broadband services connect rural areas with the internet
 - Satellite drives the development of new services such as high-definition TV & mobile TV (e.g. Korea/ Japan) and new cheap satellite broadband services
- Aid & development issues: foreign operators are often the bearers of key applications such as tele-education/ tele-medecine or the initiators of novel local projects that enable otherwise unconnected communities to develop
- Satellite technology can provide governments with independence and immediate connectivity in times of disaster & are an essential communications back up for national telecom network continuity in case of cut terrestrial lines



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Security - A Common Concern

Some countries raise security concerns as a reason for excluding foreign satellites

- Fixed Satellite Services: Need to ensure that those who 'uplink' to a satellite are responsible entities operating according to authorised procedures/ with licenses (FSS) - this requirement should not differ between foreign & domestic satellites.
 - Mobile Satellite Services: Beyond a receiver, no physical infrastructure is required locally to receive a satellite signal. However some countries often impose the presence of a local gateway on the territory
 - ⇒ ***Alternative solutions often satisfy security concerns even better than local gateways***
 - ⇒ Security concerns can be addressed but require a dialogue with the satellite operator
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Crisis Management – Mudslides in Mexico





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Crisis Management – Tsunami





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Crisis Management – Earthquake in Peru





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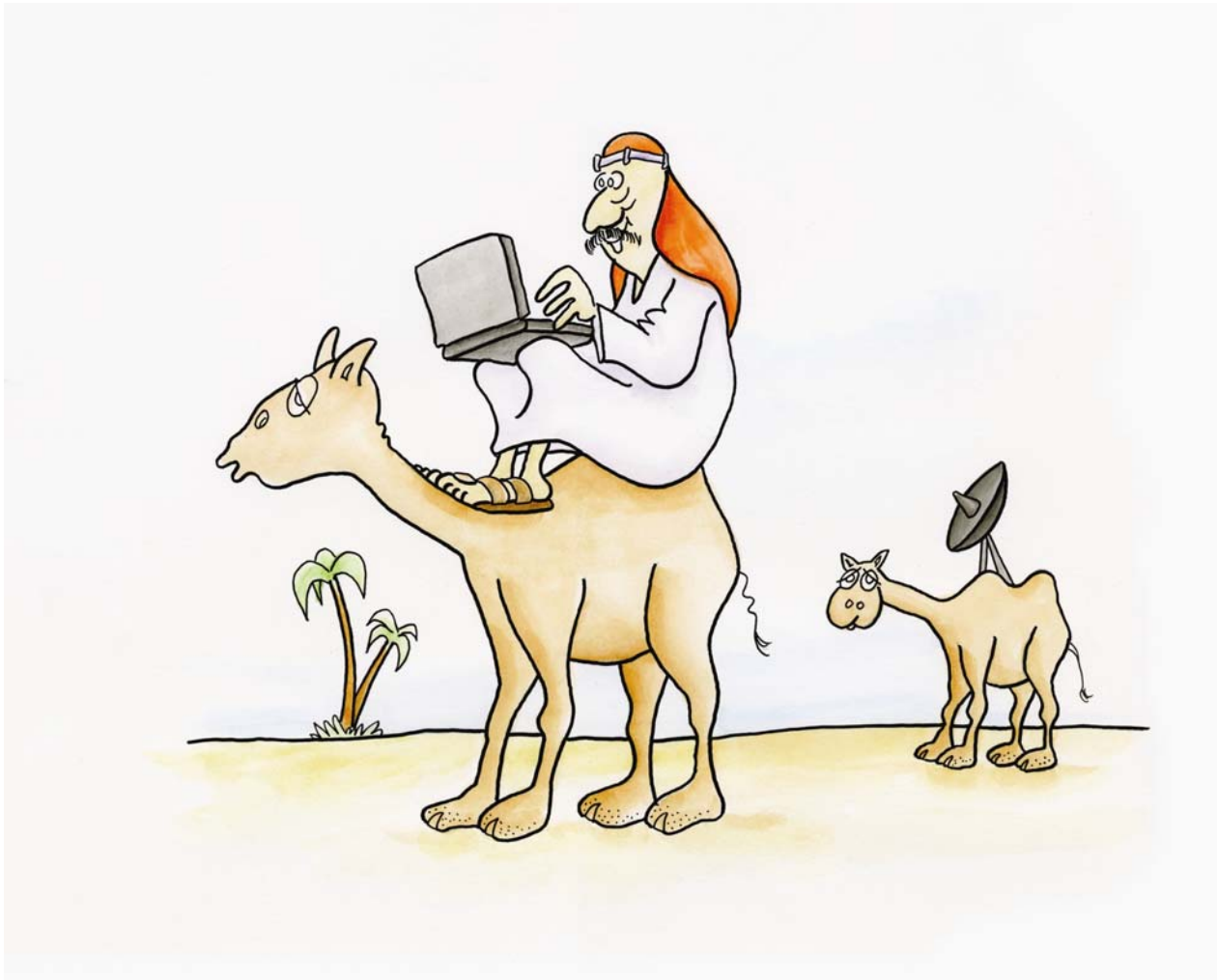
Satellite Solutions are here and NOW! Let us contribute to Sustainable Development





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