



European Satellite Operators Association

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# European Satellite Operators Emergence - Growth - Policy

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Aarti Holla  
Secretary General

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[www.esoa.net](http://www.esoa.net)  
[sg@eso.net](mailto:sg@eso.net)



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# ESOA Members



- 11 satellite operators (“Satops”) in 6 MSs of the EU
- Flying 161 satellites
- Global coverage with communications services

# TV Broadcasting

**1958: BLACK & WHITE**

Sweden football world cup

 **Satellite TV 1962**

**1974: COLOUR TV**

Germany football world cup

**2006: HDTV**

Germany football world cup

**2010: 3DTV**

South Africa football world cup





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# Emergency Communications E.g. Haiti Earthquake







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# Government & Security Communications



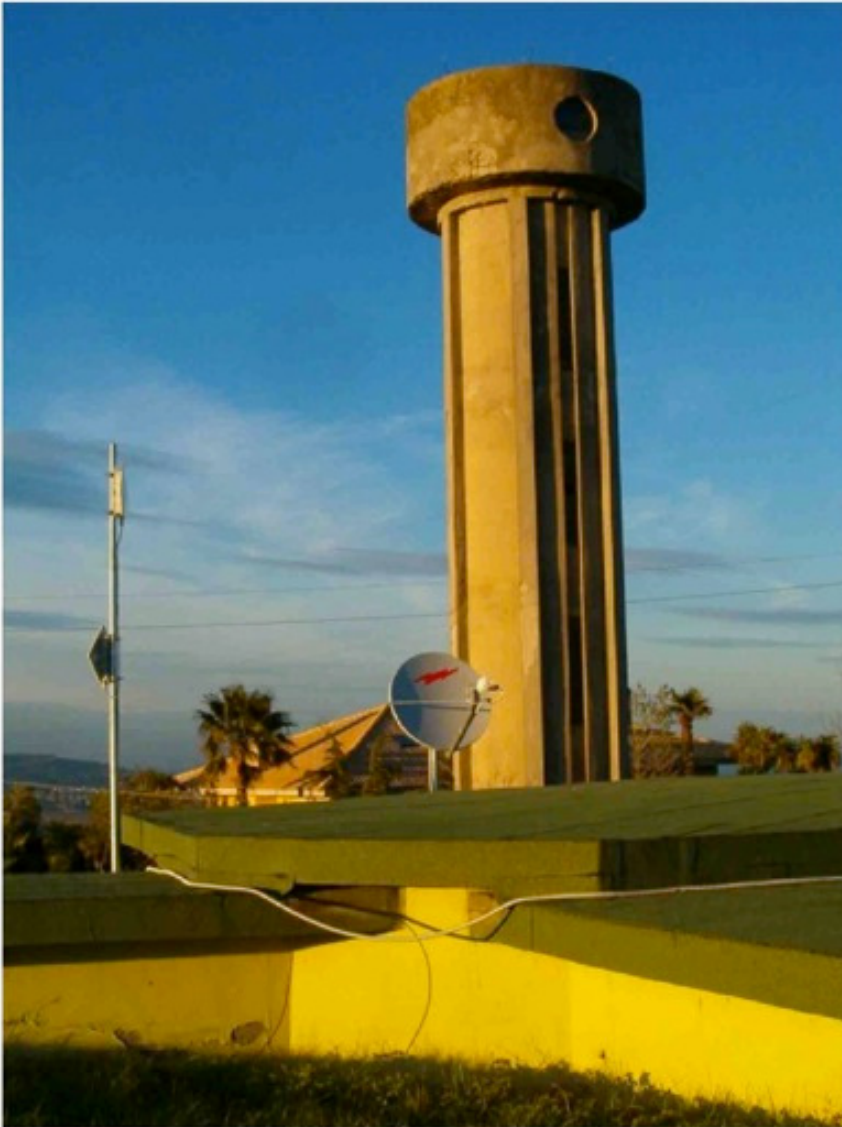




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# Monitoring Industrial Processes: SCADA

‘Supervisory Control & Data Acquisition’



## Industry Sectors:

- Power / Electricity / Smart Grids
- Water Management
- Oil & Natural Gas
- Transportation
- Industrial Automation
- Environmental Agencies





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# Climate Change





# Aid & Development

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# Broadband via Satellite





## Where did they come from?

1970's

### *Independent access to space*

- Establishment of ESA
- The Ariane launcher
- Creation of the European Telecommunications Satellite Organisation Intergovernmental Organisation (Eutelsat IGO), **Europe's first regional telecommunications satellite system**

1980's

### *Emergence of private satellite operator*

- In **1985**, creation of **SES** (ASTRA 1A launched in 1988)

1990's +

### *Full commercialisation*

- Gradual **shift towards privatisation**
- Initial public offerings
- Subsequently astronomical market capitalisations
- Some operators owned by private equity investors





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## Understanding Satellite Operators (II)

# The Role of the Public Sector

1970's

*Independent access  
to space*



- Technology Development
- Funding

1980's

*Private satellite  
operators*



- It's all about TV!!
- 1989 EC Directive:  
TV without Frontiers  
**allows free  
reception of audio-  
visual content in the  
EU => contributes to  
success of satops**

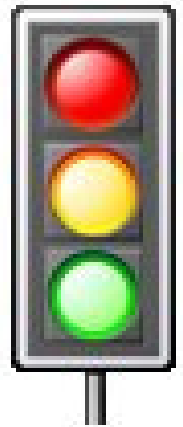
1990's +

*Full  
commercialisation*

Private  
investment

### A Natural Evolution driven by Market Forces

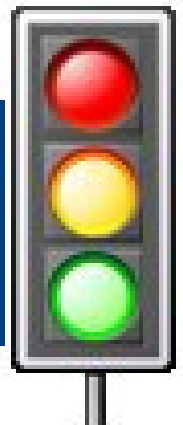
Satellite operators could raise private investment for competitive, commercial businesses without direct public sector involvement





## A Natural Evolution driven by Market Forces

Satellite operators could raise private investment for competitive, commercial businesses without direct public sector involvement



Sustainability for the whole value chain: EU Space Industry

Account for 60% of space industry's revenues

Account for 9 out of 10 Ariane launches



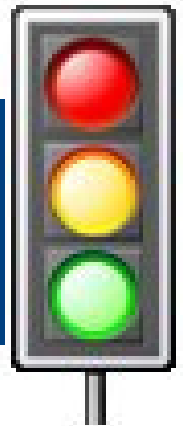
## A Natural Evolution driven by Market Forces

**Rich private operators**

**Don't need our €, don't need us**

**Not the subject of policy-making**

**Satellite operators could raise private investment for competitive, commercial businesses without direct public sector involvement**



**Sustainability for the whole value chain**

**Account for 60% of space industry's revenues**

**Account for 9 out of 10 Ariane launches**



# Essential but Invisible Applications

TV Broadcasting

Security & Defence

Emergency Comms

Maritime Comms/ Surveillance

Transport

Aid & Development

Environment

Energy (Oil & Gas)

Broadband Internet

- Essential applications, long-term contracts
- Not dependent on commercial or retail trends

## **BUT**

- Lack of policy-making  lack of awareness/ understanding
- Invisible infrastructure



# Where are we today?

## Global Debate → Regional Debate

- Ca. 3 decades ago, Satops emerged in the era of the ***space race***
- Now part of ***regional / local debates*** involving competing communications infrastructures (terrestrial operators)
  - E.g. On broadband, spectrum, etc.
  - “Digital Agenda for Europe” - high-speed broadband targets that typically are provided through fibre
  - Desire for high speeds is a dominant political issue
  - Accompanied by need to give more spectrum to terrestrial operators
- ***Spectrum*** is the lifeblood of satellites, increasing regional management
- Any loss will threaten the ***stability of future satellite services***





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# Actions

## Unified approach to raise awareness about critical satellite services:

- **Global effort:**

Different associations coming together to prepare for the next World Radio Conference where we know C-Band spectrum may again be targeted

- **Local effort towards the EU:**

European Associations & SWF coming together to show what a Day Without Satellites would be like!

## European Satellite Day 2012™

Mayday! - A day without satellites

Under the patronage of Antonio Tajani, Member of the European Commission



27 September 2012 / Committee of the Regions . Brussels

Hosted by

