

SATMAC

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Satellite Telecommunication Market
Assessment and Cost Benefit

ANALYSING THE EVOLUTION OF SATELLITE TELECOMMUNICATION

It is widely acknowledged that satellite communication is a critical technology, delivering services to the European citizen such as audio and video broadcasting, telecommunication services, mobile and more recently broadband services. The provision of broadband is of particular interest in that satellite services can be delivered to regions of poor telecommunication infrastructure, thus assisting in the closing of the digital divide between those regions with available broadband access and those without.

SATMAC was set up to assist the European Commission in analysing the evolution of satellite telecommunication up to 2030 and to propose directions for Research and Development (R&D) programmes by providing answers to five key questions:

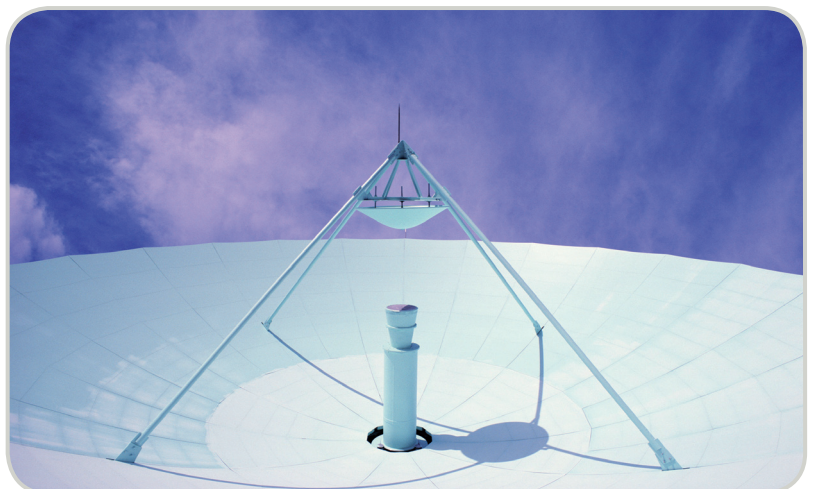
- Given the growing role of satellite communication in the global information infrastructure, what should the European vision be for satellite communication to 2030?
- What applications and services will be universally required for each stakeholder group across the Union and what impact will this have on the industrial base?
- How far can terrestrial technology advance before it becomes technically, commercially or economically non-viable, in the short and long term to 2030? How far can satellite technology close the gap and offer complementary and cost effective solutions in comparison with terrestrial technology?
- What are the competitive and regulatory pressures on satellite communication systems and how can they be relieved?
- Where should the research focus be placed to maximise the benefit to the industrial base and to develop the infrastructure that will enable a thriving downstream industry capable of competing on the global stage?

THE APPROACH

The evolution of satellite communication is influenced by three primary factors: (1) applications and the services needed to deliver them, (2) markets and (3) technologies. SATMAC addressed these three factors and established a comprehensive view of the state of the satellite communication industry in Europe with both a medium and long term perspective. The general approach that has been taken was to divide the view of the evolution of satellite communication into two timeframes: now to 2015 and 2015 to 2030. For the first period, most new applications, services and technologies which will be introduced are in development or early implementation now and so it is possible to be specific about the developments. For the second period, it is not possible to identify specific applications and technologies which will appear and so the SATMAC consortium has looked at trends and where current research and development might lead.

The work included a cost benefit analysis related to the use of satellite technology to access/develop applications and services. The competitive position of the technology in relation to developing terrestrial communication has been considered. In a number of instances, both satellite and terrestrial delivery are needed together to provide an effective solution, in this case the two technologies complement one another and this has also been investigated.

SATMAC has organised a workshop to disseminate its findings, which resulted in valuable discussions with representatives from the industry, the research community, the European Space Agency and the European Commission. The key output of the SATMAC support action has been to develop guidelines for R&D policy for satellite communication.



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PROJECT INFORMATION

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