Satellite Executive BRIEFING

Vol. 18 No. 3 April 2025

SATELLITE Markets & Research

Industry Trends, News Analysis, Market Intelligence and Opportunities

The Military Satellite Market

by Elisabeth Tweedie

Defense and government have always been significant markets for the satellite industry, and if anything, that significance is increasing. In the US in particular, this is partially due to the increasingly close cooperation and integration of commercial players into the US Department of Defense (DoD) strategy. In addition, in response to current geopolitical tensions and events around the world, globally, defense spending is on the rise. At the same time, more regions and nations are prioritizing independent defense strategies, rather than rely on cooperation with others. With the current US administration's focus on an "America First" policy, this trend is likely to continue and probably accelerate.

Image: iStock, credit: gorodenko

Most likely as a direct reaction to the new US focus, and possibly spurred on by the sudden (short term) cessation of information sharing and arms delivery to Ukraine by the US, that occurred at the beginning of March; the European Union (EU) has issued a new defense and rearmament policy known as ReArm Europe or the Readiness 2030 plan. This plan is designed to deliver an increase in European defense readiness in order to deter any future attack from Russia, whilst at the same time, becoming less reliant on the US.

At the moment both the US and the UK are excluded from participating, although general opinion seems to indicate that the UK will be included in some way in the future. Kaja Kallas, High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission stated: "We are working on having this defense and security partnership with the UK. I'm really hoping that by the summit in May, (when the UK and the EU are scheduled to discuss strengthening their ties) we can have results." When announcing this defense plan, Ursula von der Leyen, President of the European Commission said: "We must buy more European. Because that means

Continued on page 4

What's Inside

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EDITORIAL

The Military Satellite Market

A recent report by Analysys Mason shows that the military satellite market is positioned for significant growth. As geopolitical tensions grow and the barriers to accessing space decrease, national security strategies will increasingly get involved with the space industry, according to the report.

"As geopolitical instability continues, enabling satellite interoperability abilities will be essential for players that want to seize the opportunity in this market that is worth more than US$ 78 Billion," said Sarah Halpin, analyst for Analysys Mason.

With the increasing significance of the military market in the new geopolitical environment, this issue focus on this important segment of the satellite industry.

This month, Satellite Markets and Research will be covering the Space Symposium in Colorado Springs to bring you the latest news on the military market. Meanwhile, in case you haven't seen it the video interviews with key executives from the Satellite show in Washington, D.C. is now available. Check them out at: https://satellitemarkets.com/people/interviews-key-satellite-executives-satellite-2025-show-washington-dc

Enjoy this issue.

Virgil Labrador
Editor-in-Chief

Satellite Executive BRIEFING
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EDITORIAL

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Satellite Executive Briefing is published monthly by Synthesis Publications LLC and is available for free at www.satellitemarkets.com

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Military Satellite Market... from page 1

strengthening the European defense technological and industrial base." Historically, around 66% of EU procurement orders have been directed to US defense companies.

Seven priority areas considered critical to EU defense are specified. These include:

- Air and missile defense.
- Drones and counter-drone systems.
- Military mobility,
- EU-wide advanced electronic systems designed to a) protect and ensure the unhindered use of the electromagnetic spectrum for land, air, space and naval forces and operations; b) suppress, disrupt and deny the use of the electromagnetic spectrum by an opponent,
- Strategic enablers and critical infrastructure protection: including but not limited to Strategic
- Airlift and Air-to-Air refuelling aircraft, intelligence and surveillance, maritime domain
- awareness, use and protection of space and other secure communications assets and military fuel infrastructure
- Artillery
- Ammunition and missiles.

The first five rely heavily on space infrastructure.

Total budget for this plan is 800 billion euros (US$870 billion), 150 billion euros of which the EU hopes to borrow. EU Countries can apply for loans through this program, known as Security Action for Europe (SAFE) until the end of 2030. The EU has a AAA rating, meaning that it can borrow more cheaply than many individual European countries which have lower ratings. The emphasis is on joint procurement. Orders for equipment would have to come from at least two or more eligible countries, one of which must be an EU country receiving SAFE financial assistance. The other may be another member state, an EFTA State, a member of the EEA or Ukraine. The EEA is comprised of EU states, plus Norway, Iceland, Lichtenstein. EFTA is comprised of those three countries and Switzerland

Although not expressly stated in the white paper announcing ReArm Europe, it has been reported that at least 65% of the equipment purchased with the loans will have to be for parts originating in the EU, EEA, EFTA or Ukraine. Countries must also ensure that they have the option to replace components made outside of the EU with local equivalents, should the original producer decide to place restrictions on the use of the equipment.

The white paper also references expanding "mutually beneficial engagement and cooperation in the field of security and defence with all like-minded European, enlargement and neighboring countries (including Albania, Iceland, Montenegro, the Republic of Moldova, North Macedonia and Switzerland) to promote peace, security and stability on our continent and beyond." Other countries mentioned for potential cooperation include: Japan, The Republic of Korea, India, Canada, Australia and New Zealand.

In its first report on Space Defense and Security, Novaspace (a merger between Euroconsult and SpaceTec Partners) forecast that the global launch rate for defense and dual use (defense and commercial) satellites will grow by 160% in the ten years to 2034. In 2023 a record 107 defense and dual use satellites were launched; this represents a massive 40% increase from the year before. In the same report, Novaspace estimated that in 2023 worldwide government expenditure on space, defense and security reached US$58 billion, of which US$40 billion was contracted out to industry for manufacturing and launch of dual use satellites (US$24 billion), user terminals (US$3.3 billion), operation of government systems and sale of data (US$10.2 billion) and provision of managed and value-added services (US$2.7 billion).

Space is now integral to any defense, and indeed offense, strategy. Ground operations rely heavily on information delivered from space. This could be surveillance of troop movements and obstacles delivered from earth observation (EO) satellites, or communications originating elsewhere

"...Space is now integral to any defense, and indeed offense, strategy. Ground operations rely heavily on information delivered from space. This could be surveillance of troop movements and obstacles delivered from earth observation (EO) satellites, or communications originating elsewhere in the theater of war..."

in the theater of war. In addition, space itself now has the potential to be a war zone, as countries develop satellites capable of not only spying on other satellites, but also destroying them (ASAT capability).

Other key applications for military satellite communications, include: early warning and missile defense, intelligence, surveillance and reconnaissance (ISR), global force connectivity, provision of resilient networks able to withstand cyber-attacks and jamming, provision of space-based positioning, navigation and timing (PNT) capability for navigation and missile guidance.

The US has the world's largest budget for space, defense and security, accounting for US$38.9 billion of the global US$58 billion expenditures in 2023. Nevertheless, widespread cost-saving efforts across US government departments, leave the Department of Defense (DoD) with a lack of clarity as to precisely where and when the cuts are going come. To quote a recent headline in the Federal Times "Uncertainty is the only constant in the Pentagon's budget outlook." The DoD has been ordered to cut its 2026 budget request by approximately US$50 billion, in order to allocate the money to "new priorities." Right now, neither where the US$50 billion will come from, nor what the "new priorities" are is clear. However, it is likely that the Golden Dome will be one of the new priorities. This is an ambitious project to create a missile defense architecture covering the entire United States, similar to Israel's Iron Dome. The Golden Dome is intended to be a comprehensive defense system, protecting against ballistic, hypersonic, advanced cruise missiles and drones. By definition, this project will rely very heavily on space assets, so as long as this project remains a priority, it's safe to say that defense spending on space is likely to continue.

At the time of writing, there is no clear public information as to what form the dome will take, nor how much it will cost. Concerns have been expressed that one of the major challenges, will be that of organization and establishing a clear chain of command. Following a recent planning session, which included the Missile Defense Agency, the National Geospatial-Intelligence Agency and the National Reconnaissance office as well as representatives from the armed forces, General Michael Guetlein, Vice Chief of Space Operations, commented: "They were all present in that room talking about what it is going to take to get after something of this magnitude…..That's how complex this capability is going to be. But it's not complex because the technology is going to be hard. It's complex because of the number of organizations and a number of agencies that need to be involved." The Golden Dome has been compared in size and scope to the Manhattan Project. This was the project that produced the first atomic bomb. It cost around US$2 billion by the time of its completion in 1944, equivalent to around US$33 billion in 2025 dollars. The Pentagon is scheduled to deliver a recommendation on the Golden Dome at the end of March.

Returning to that headline in the Federal Times, whilst an increase in spending on space and space related assets for defense seems certain, given the new European strategy, which countries and companies are going to be the major beneficiaries of those orders, is very uncertain.

Trends in the Military Satellite Market

Read or download a MarketBrief report on the Military Satelite market at: https://satellitemarkets.com/pdf/pdf2025/Military-Market-Brief-2025.pdf

Elisabeth Tweedie is Associate Editor of the Satellite Executive Briefing and has over 20 years experience at the cutting edge of new commmunications entertainment technologies. She is the founder and President of Definitive Direction (www.definitivedirection.com), a consultancy that focuses on researching and evaluating the long-term potential for new ventures, initiating their development, and identifying and developing appropriate alliances. She can be reached at: etweedie@definitivedirection.com

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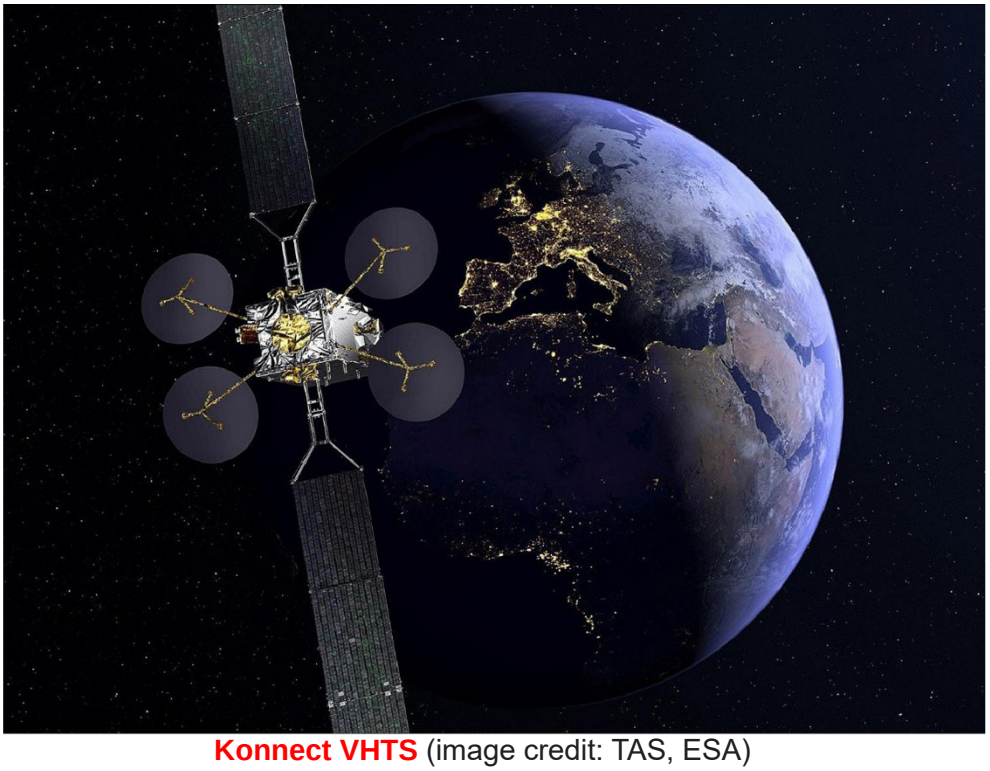
FEATURE

GEO Satellites: Old Faithful

by Bruce Elbert

With all of the activity and associated hype of broadband Low Earth Orbit (LEO) constellations, one wonders if there is anything left to say about Geostationary (GEO) satellites and applications. I chose Old Faithful, that amazing geyser in Yellowstone National Park, as the theme for this article because it, like dependable geostationary platforms, can be relied upon to simply do its thing. Old Faithful is powered by natural causes much the way that a GEO converts sunlight into dependable services to and by fixed positions on the earth. It's like man-made bridges such as Hells Gate in New York or the Golden Gate in San Francisco: little maintenance is needed, and for a GEO, orbital operations are the simplest of space missions. GEO platforms are built with redundancy and multiple ways of control, in contrast to simple LEO vehicles that collectively provide reliability. Communications payloads are designed for high RF power, wide bandwidths and long life, e.g., once the satellite is in operation it can be expected to deliver for up to 20 years. It's my experience that a GEO satellite in service with a customer base is a quality investment like a gas pipeline or airliner.



Konnect VHTS (image credit: TAS, ESA)

In a previous article here on the Satellite Executive Briefing (January 2025 issue), I cited technical problems with some GEO satellites owing to poor design and operating flaws. But, the bulk of GEO satellites have operated well and their performance has not declined appreciably expect for life limiting aspects like fuel remaining and solar panel power reserves. New launches can result in more power and bandwidth, the two quantities that users can employ for benefits and strategic advantage. An orbit slot is a focal point for service and as long as it is in view from the user or gateway, the service is assured. The spectrum in L through Ka bands has proven very effective for a wide range of applications, both fixed and mobile. We can put "lots of bandwidth" into a cheap fixed terminal, and the cost per Mbps on the biggest HTS designs is competitive with any of the current broadband LEO systems (see my previous article on this). The only limitation is in terms of latency, but consider two things:

1. Broadband is more demanded for video streaming and file transfer, neither of which is sensitive to delay; and

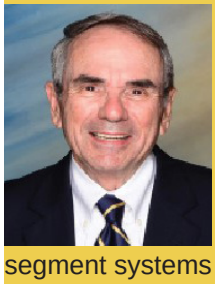
2. GEO-based networks are the simplest to operate and troubleshoot because there are only three points to be linked as compared to a constellation with intersatellite links.

There are other features of GEO to be considered but one needs a specific application to go through the tradeoffs that produce the best approach. GEO should always be in the mix lest the best option be ignored. One scenario is for service to only one continent or country, and a pair of moderate size GEO satellites can reliability and affordably meet the need. If an NGSO constellation is considered, then more investment is needed and most of the satellites are not providing the desired services. Of course, the planned regional or national requirement may be met through committing to service from a global NGSO operator, but this sacrifices control and potential financial benefits of ownership of space segment resources.

Taking the point of reliability, you can worry that your GEO orbit slot is known to potential adversaries who can employ jamming and anti-satellite tactics to deny you this resource. But, there are still lots of uses for a dependable GEO resource that covers a hemisphere all at once. I'm sure that governments that are pursuing NGSO will still employ GEO for services that are not critical to a specific operation. On the other hand, some critical operations can benefit from the dependable over-the-horizon communications that GEO uniquely provides.

"…Major commercial operators are experiencing a decline in GEO revenues because video is no longer the powerhouse it once was. Compounding this is that consumer broadband data is not a growth market for these operators as was hoped..."

Major commercial operators are experiencing a decline in GEO revenues because video is no longer the powerhouse it once was. Compounding this is that consumer broadband data is not a growth market for these operators as was hoped. More consolidation is in the offing for sure. However, many usages will depend on Old Faithful GEO as long as operators find space in their orbits for them. These include inflight broadband that several GEO operators pursue with success, and various industrial and government uses where rapid introduction of high-bandwidth is demanded. Long term, it is likely that the number of active GEO slots will fade but the ones in use will see high-performance satellite designs for new markets that may not be visible (like the geyser between eruptions) until they are.



Bruce Elbert is the Founder and President of **Application Technology Strategy LLC**. He is a satellite industry expert, communications engineer, project leader and consultant with over 50 years experience in communications and space-based systems in the public and private sectors. Areas of expertise include space segment design and operation in all orbit domains, systems architecture and engineering, ground segment systems engineering, development and operation, overall system performance improvement, and organizational development. He can be reached at: bruce@applicationstrategy.com

Video via Satellite is Dead. Long Live Video via Satellite!

by Robert Bell

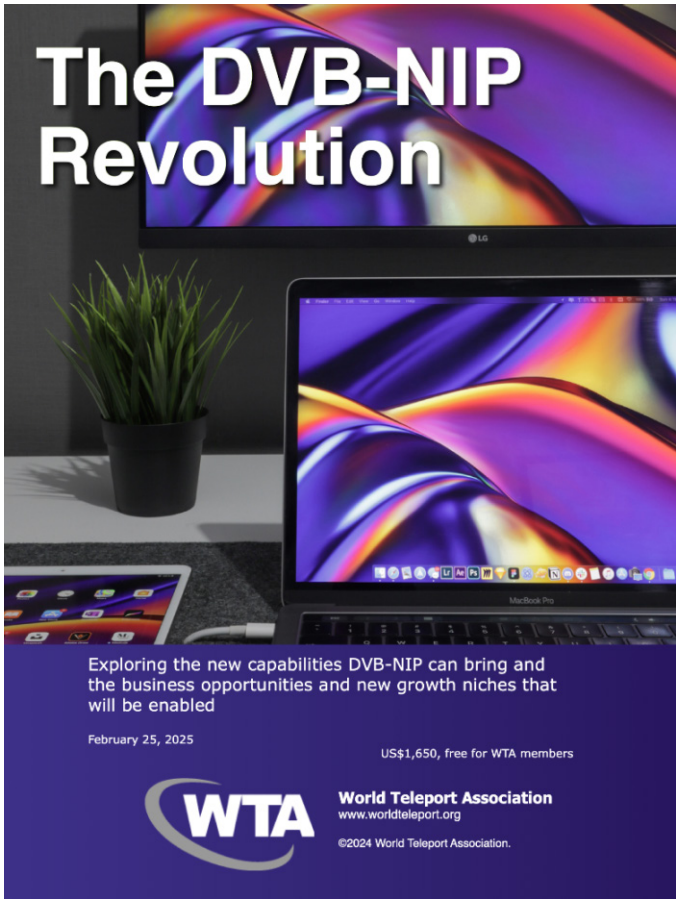
We all know the story. The days when broadcast TV is delivered by satellite are numbered. Pay-TV households in the US declined 31 percent, from 84 million in 2019 to 58 million by the end of 2023, according to Statista. While the decline was offset by growth in the Asia-Pacific and EMEA, Ampere Analysis predicts that this situation will change, as the industry experiences the first-ever annual decline in global pay TV penetration.

But, as author Mark Twain wrote in 1897 after reading his own obituary – mistakenly printed by a newspaper – "Reports of my death are greatly exaggerated." The same may be true of satellite video delivery, thanks to the 2024 introduction of DVB Native IP or DVB-NIP, a new standard for native IP broadcasting.

DVB-NIP integrates over-the-top OTT and broadcast paths into a single IP media distribution solution, which creates a platform capable of natively streaming incoming video to all devices on a home or business network. Just as vital, it enables the creation of services of high value to broadcasters, including ad insertion and content regionalization. Proponents and early adopters see this integration as a way to revolutionize satellite broadcasting, because it combines file-based and IP-based content delivery to to set top boxes, smart TVS, tablets and other connected devices.

What You Need to Know

DVP-NIP is an innovative response by DVB to massive changes in the broadcast business. If video is or could be part of your business strategy, WTA's new report, The DVP-NIP Revolution, explores the new capabilities it brings and the business opportunities and new growth niches it can enable. Here are the highlights:



Broadcasting is well into a massive shift from satellite to internet delivery. The majority of video traffic is now delivered via IP – streaming services, corporate media, social media and e-learning. DVB-NIP will help satellite services blend seamlessly with other IP networks and is a necessity to help the satellite broadcast sector remain a viable player in the market as well as help solve challenges being created by the ever-growing amount of video content delivered to smart devices via the internet.

The technology is already proven. There has been positive feedback regarding DVB-NIP development efforts. Demonstrations at trade shows and a major deployment project with the government of Peru have shown that DVB-NIP is ready to be deployed and make an impact for satellite broadcasters.

Companies are ready to roll out the solutions. Companies that contributed to the development of the DVB standard are ready to offer solutions to broadcasters. Many consider rollout of the technology and the needed equipment to be a simple process. They are just waiting for customer demand.

The business cases are still being developed. Service providers trust the DVB-NIP standard and see its potential, but many are hesitant to move forward without a strong business justification. With end-user customers seeking more and more short-term contracts – one or two years – to maximize their own flexibility, some service providers are not sure that the investments needed to offer DVB-NIP services will provide the needed returns.

DVB-NIP puts satellite in a better position. The world is consuming more video outside of traditional TV streams, and the development of DVB-NIP is a recognition that the satellite broadcast sector needs an IP-delivery solution. Satellite remains the most efficient manner to deliver content at scale, and DVB-NIP brings the advantages of modern IP-based clients together with the quality and efficiency of broadcast delivery. With DVB-NIP, satellite will be able to work with IP networks and compete when the opportunity arises.

With the Native IP standard, DVB has laid the foundation for introducing next-generation broadcasting services. It will save operators on platform costs for reaching IP devices in homes. In emerging markets, operators can serve mobile users via hotspot gateways in public spaces. Native IP will require operators to commit to additional transmission infrastructure and manufacturers to develop new home equipment. But DVB-NIP can definitely bridge the gap between OTT and traditional broadcast services – a gap in which the satellite industry once saw only a future of decline.

"...DVB-NIP puts satellite in a better position. The world is consuming more video outside of traditional TV streams, and the development of DVB-NIP is a recognition that the satellite broadcast sector needs an IP-delivery solution. Satellite remains the most efficient manner to deliver content at scale...with the quality and efficiency of broadcast delivery...."

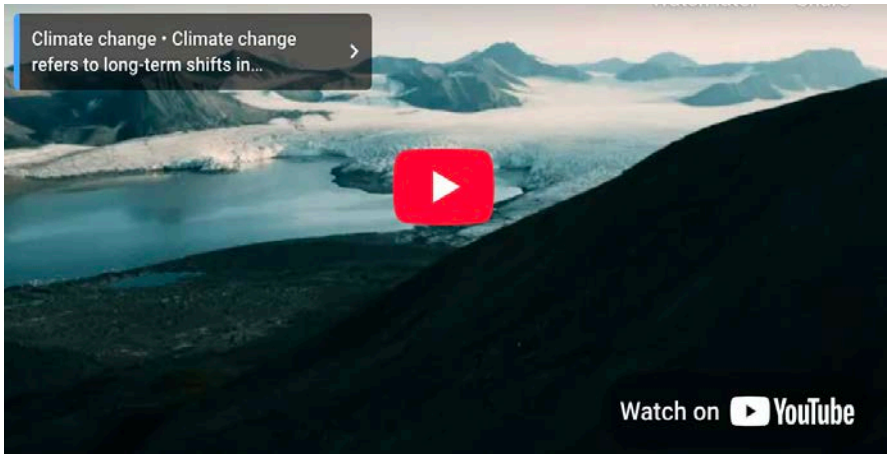
Robert Bell is a strategic advisor to the World Teleport Association (www.worldteleport.org), which conducts research into the teleport and satellite industry, provides a unified voice for teleport operators and offers Teleport Certification programs to service providers. The DVB-NIP Revolution is available for free to members and for sale to non-members from WTA's online store. He can be reached at: rbell@worldteleport.org

Bringing Data Home from the Ends of the Earth

For 30 million years, the North and South Poles have been kingdoms of ice and snow.

But today, there is nowhere on Earth more at risk from climate change. The Antarctic is warming twice as fast as the rest of the world. Arctic temperatures are rising even faster.

The melting of the poles is already changing our world. We see it in rising seas, worsening weather and big shifts in where plants, animals and people can thrive. Scientists are in a race against time to understand what is happening at the poles and help the world change the story.



You can view the "Data From the Ends of the Earth" video on Youtube at:
https://www.youtube.com/embed/zJeKeS6fpHU?si=UG5yG__h8swU5m2w

Managing What You Can Measure

Starting in 2019, the crew of the icebreaker Polarstern trapped their ship in Arctic ice for a whole year. One hundred researchers from Germany's Alfred Wegener Institute labored through the cold and darkness, tracking changes in the ice, ocean and atmosphere.

At the other end of the Earth, researchers for the Australian Antarctic Program voyage aboard the icebreaker Nuyina, a floating laboratory. Their work is critical in a place where massive shelves of ice grow weaker by the year, raising the risk they will plunge into the ocean and boost sea level.

Drowning in Data

Polar research faces one more big challenge. The Polarstern's year in the ice produced more than 90,000 data points. A single voyage of the Nuyina creates 160 trillion bytes of data. In the race against time, no one can afford to wait months for ships to return to port with information. They need it now.

From the ends of the Earth, the data makes its way home by satellite. But the poles have long been a bad place for satellite service. For decades, most satellites have circled the Earth above the equator. Because the Earth is curved, radio waves reach the poles from the side, not overhead. Passing through all that air weakens the signal, and a hill or iceberg in the wrong place blocks it completely.

Today, Starlink and OneWeb are covering the entire globe. But they are especially vulnerable to rain fade from bad weather, which is common at the ends of the Earth.

A company called Speedcast has the answer. It combines GEO satellite service with LEO service covering the poles. It takes a lot of smart engineering and advanced technology, but it makes sure that polar researchers are never out of touch. Speedcast can move one thousand seven hundred gigabytes of data a day from the Antarctic to Australia – enough for 15 hundred high-definition movies. That keeps the vital data flowing and protects the health and morale of people working at the ends of the Earth.

What do they think of the new service? In 2023, the Polarstern ploughed through thin ice all the way to the North Pole. The captain announced their arrival by email. It was the ship's seventh visit to the Pole, he wrote – but the first one where he could tell the world about it as it happened.

Produced by Space & Satellite Professionals International SSPI, see more stories and videos of satellite making a better world at:
www.bettersatelliteworld.com

PRODUCT SPOTLIGHT

Jonsa Technologies

Jonsa Technologies from Taiwan is a trustworthy manufacturer of communication antennas, and our monthly production capacity has been over one million in a variety of antenna products. We are waiting for the new partner who cooperates with us and creates the win-win situation together.

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- Support Ku and Ka band as an option
- Carbon fiber reflector with light weight, high strength and one person can finish the installation within 3 minutes.
- Easy operation with one button.

VSAT (E74/97/120) antenna

- Customized VSAT antenna products
- Correspond with electronic devices, such as integrated LNB and Feedhorn
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- Support beacon receiver, DVB-S, DVB-S2, and digital tracking system

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INTEGRASYS: Leading Space and Defense Innovation for Connected Allies

by Alvaro Sanchez

Space has become a new defense domain that enables more traditional defense domains with communications, observation, navigation, and less applications. As it became critical, contested, and congested new threats and solutions have emerged in a newer faster race.

Advancing Military Defense and Space Security

Recent developments show a strong focus on military defense capabilities. The industry has expanded its Electronic Warfare (EW) technologies, making them more powerful and adaptable based on direct feedback from warfighters. These advancements are crucial in supporting global security efforts.

The use of interference management tools, including CleanRF, Vectorsat, InterGeo, and EO Master, provide military users with robust protection against intentional and unintentional interference in COMSATCOM/MILSATCOM services. These tools are essential for maintaining secure and reliable communications in contested environments, a critical aspect of modern military operations.

The launch of Orbisat represents a significant advancement in Space Domain Awareness (SDA), providing automated capabilities for tracking and collision avoidance. This system is crucial for both military and commercial space assets, enabling defense organizations to monitor and safeguard their assets in orbit and providing early warnings of potential adversarial actions in space. Orbisat's capabilities are particularly relevant in the current geopolitical climate, where space is increasingly recognized as a potential battlefield.

Technologies like Controlsat and InterGeo address critical challenges in satellite network management, offering solutions for rapid interference detection and resolution, as well as efficient communication planning in complex orbital environments.

Innovative Solutions for Complex Environments

Observing Earth has never been more important with a new war between the East and the West; now planes might not fly over certain countries but satellites do every day as the most effective and discrete ISR with technologies such as EO Master, ISR reports are generated automatically using Artificial Intelligence (AI).

The new orbits are enabling resiliency of path to connectivity. However, networks have become more complex than ever before to manage and route as a result of revolutionary multi-orbit solutions like LEO NMS and BestPath, designed to optimize complex satellite networks.

Disruptive technologies address the growing needs of military and government clients operating in diverse orbital environments, ensuring seamless communication across different

satellite constellations.

Leading the Charge in Space and Defense Technology

In security, the industry has made significant advances in Enterprise Digital Twin and Quantum Key Distribution (QKD) technologies, strengthening security in satellite communications. These innovations are particularly relevant in the context of increasing cyber threats to military and government communications infrastructure.

The industry focus on cybersecurity must extend to protecting GSM 3G, 4G, and 5G networks, WiFi monitoring, firmware protection, and implementation of RF encryption and inhibitors. These automated systems work tirelessly to ensure the digital security of military and government networks, a critical aspect of national security in the digital age.

INTEGRASYS serves a diverse range of clients, including the US DoD, allied MoDs, space agencies like ESA or NASA, and global commercial satellite operators. The company leads innovative projects in the space and defense sector, including the development of Satellite Interference technology for the European Union (EU) and the integration of advanced defense systems in conflict zones.

Technologies like Controlsat and InterGeo address critical challenges in satellite network management, offering solutions for rapid interference detection and resolution, as well as efficient communication planning in complex orbital environments. These solutions have been successfully implemented in numerous Space Forces and Space Commands, demonstrating their effectiveness in real-world military applications.

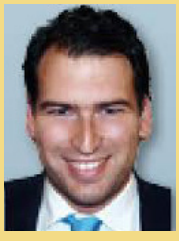
"...Disruptive technologies address the growing needs of military and government clients operating in diverse orbital environments, ensuring seamless communication across different satellite constellations..."

Shaping the Future of Space EW and Defense

Looking to the future, INTEGRASYS is preparing to play an even more crucial role in space EW. The company continues to evolve its product suite to support the US DoD, guiding NATO's space strategy and its allies in protecting critical space assets and maintaining technological superiority in an increasingly disputed and complex orbital environment.

As geopolitical tensions rise and space becomes an increasingly contested domain, INTEGRASYS's ongoing innovations in multi-orbit satellite network management, SDA, EW, and satellite communications security position it as a key player in maintaining global security and enabling effective operations in the critical space domain.

The company's commitment to pushing the boundaries of space and defense technology ensures that it will continue to be at the forefront of developing solutions that enhance global security and enable effective military operations in the increasingly critical space domain. With its comprehensive range of products and services, INTEGRASYS is well-positioned to address the complex challenges of modern warfare and space operations, supporting the defense capabilities of nations around the world.



Alvaro Sanchez is CEO of Integrasysand Marquess of Antella (Noble Title from 17th century in Spain). Alvaro is a Software and Industrial engineer from European University and holds a Master Degree in Management, Sales & Marketing from ESIC Business School. Alvaro during the last 10 years has worked at Integrasys as Management, Sales Director and Executive roles were he was very successful growing the sales, revenue, profit and responsibilities within the company; and previous to that he was working at CERN European Organization for Nuclear Research as a RF Engineer measuring timing in a Nanosecond Synchronization for measuring the Neutrino Speed. The Noble Title that he hosts, is coming in his heritage from 1649 from his ancestor Nicolo Palavicino, given by Phillip IV in Sicily for the Antella region near Florence. He can be reached at:

alvaro.sanchez@integrasys-sa.com

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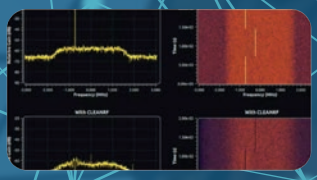

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Rocket Lab to Acquire Mynaric

Long Beach, Calif. March 11, 2025-- LaunchRocket Lab USA, Inc. (Nasdaq: RKLB) announced it has entered into a non-binding term sheet with certain lenders to acquire, subject to receipt of certain governmental approvals, a controlling equity position in Mynaric AG, a provider of laser optical communications terminals for air, space, and mobile applications. The transaction is expected to close following the completion of Mynaric's previously announced and pending StaRUG restructuring proceedings under German law, the completion of which would result in certain outstanding debt held by the lenders converting into 100% of the equity of Mynaric subject to receipt of applicable regulatory approvals.

Rocket Lab founder and CEO Sir Peter Beck said: "We have been very clear about this strategic direction for several years now – Rocket Lab is pursuing every part of the space value chain. We launch our own rockets, we build satellites in constellation volumes, and now we're closing in on the final step and most valuable part of the space economy – operating our own constellations to provide data and services from space using our newly announced Flatellite spacecraft. Mynaric has paved the way in developing laser technology. Their team and technologies will make a compelling addition to our satellite component portfolio and we look forward to making the technology available at scale for our own constellations and those of our customers."

The non-binding term sheet entered into with the Lenders provides for a proposed acquisition of Mynaric by Rocket Lab following the completion of the StaRUG Restructuring on terms acceptable to Rocket Lab. After the completion of the StaRUG Restructuring and subject to execution of a definitive agreement, Rocket Lab would acquire 100% of the outstanding equity interests of Mynaric.

The initial purchase price is expected to be US$ 75 million payable in either cash or shares of common stock of Rocket Lab, at Rocket Lab's option, with the potential for additional earn-out consideration based on future revenue targets of the Mynaric business of up to an additional US$ 75 million in shares of Rocket Lab common stock or cash, at Rocket Lab's option. The initial closing purchase price will also be increased (and the potential earnout consideration correspondingly decreased) to the extent of any additional cash investment by the Lenders or their affiliates in Mynaric after completion of the StaRUG Restructuring and before the closing of the potential acquisition.

The non-binding term sheet provides for an exclusive negotiating period between Rocket Lab and the Lenders and is subject to completion of customary due diligence by Rocket Lab and the negotiation and entry into a definitive purchase agreement between the parties. The definitive agreement will also include customary covenants and closing conditions, including required regulatory approvals and termination rights. There can be no assurances that Rocket Lab will enter into a definitive agreement or complete the acquisition.

Mynaric is not a party to the non-binding term sheet and Rocket Lab is not offering to acquire and will not acquire any of the currently outstanding equity interests of Mynaric AG. Among other conditions, the proposed acquisition will be conditioned on the completion of the StaRUG Restructuring and prior elimination of all such outstanding equity interests without any consideration, as contemplated by Mynaric's previously announced StaRUG Restructuring plan.

iKOMG Announces Leadership Transition

Pfaffikon, Switzerland, March 24, 2025–iKOMG announced a significant leadership transition. After nearly seven years of dedicated service, **David Treadway** is stepping down as Chairman. In his place, the company announced the appointment of **Francesco Cataldo**, as its new Chairman, effective April 1st, 2025.

David Treadway has been at the helm of iKOMG during a transformative period, guiding the company to remarkable milestones. Under his leadership, iKOMG:

Expanded its global footprint, building strong relationships with key partners across Europe, the Middle East, and beyond.

Enhanced its service offerings, solidifying its reputation as a trusted provider of cutting-edge broadcast and satellite communication solutions.

Strengthened iKOMG's position in a highly competitive industry, adapting to market shifts and technological advancements with agility and expertise.

Reflecting on his time at iKOMG, David Treadway shared: "Leading iKOMG has been an incredible experience. Over the past seven years, we have built something truly special—an innovative, forward-thinking company that continues to push the boundaries of broadcasting and media solutions. I want to express my deepest gratitude to our founders, Shmulik and Shlomi, my fellow directors and Board members as well as the entire iKOMG team, for their unwavering support and commitment. It has been an honor to work alongside such talented professionals. As I step down, I do so with great confidence in the future of iKOMG under Francesco's leadership. His experience and vision make him the perfect person to take the company to new heights."

Taking over as Chairman, Francesco Cataldo brings more than 30 years of leadership experience in broadcasting, media, and telecommunications. His background includes executive roles such as Deputy CCO and other Commercial and Operational roles in Eutelsat.

Cataldo's extensive expertise in strategic business development, satellite communications, and media distribution positions him as an ideal leader to continue iKOMG's upward trajectory. He is widely respected for his ability to drive growth, cultivate strong client relationships, and spearhead transformative projects in the ever-evolving media landscape.

Expressing his excitement for the role, Francesco Cataldo stated: "I am honored to step into the role of Chairman at iKOMG. The company's commitment to innovation, client service, and industry leadership has set a strong foundation for continued success. My vision is to build on this legacy by driving further technological advancements, expanding our global market reach, and strengthening our strategic partnerships. The broadcast and media industry is evolving rapidly, and I look forward to leading iKOMG through this dynamic period, ensuring we remain at the forefront of change."

iKOMG Founders and Owners, Shmulik Koren and Shlomi Izkovitz, expressed their gratitude to David

Francesco Cataldo

and their enthusiasm for Francesco's leadership.

Shmulik Koren, Co-Founder of, iKOMG: "David's leadership has been instrumental in shaping iKOMG into a globally recognized brand. His strategic insights, deep industry knowledge, and unwavering commitment to excellence have left a lasting impact on our company. We are deeply grateful for his contributions and wish him all the best in his future endeavors."

Shlomi Izkovitz, Co-Founder of, iKOMG: "We are excited to welcome Francesco as our new Chairman. His impressive background and leadership experience will be a tremendous asset as we continue to grow and innovate. We have no doubt that under his guidance, iKOMG will expand its reach, enhance its service offerings, and continue to lead in broadcast and media solutions."

ABS Appoints Matthieu Boutrolle as CTO

Dubai, UAE, March 24, 2025 – Satellite operator **ABS (Agility Beyond Space)** announced the appointment

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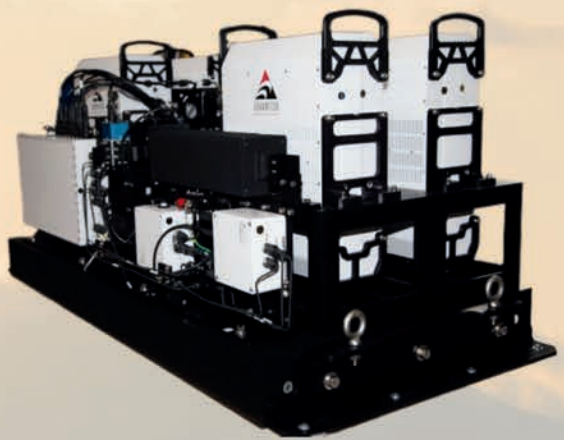

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of **Matthieu Boutrolle** as its new Chief Technology Officer (CTO). With an extensive background in satellite design, procurement, and operations, Matthieu brings 20 years of expertise in leading large-scale space programs from concept to execution.

Previously, Matthieu served as Director Spacecraft Programmes at SES, overseeing satellite procurement and managing various satellite projects since 2017. His expertise in contract negotiations, manufacturing oversight, and program management ensured successful project execution. He also held other key roles at SES, where he contributed to mission operations, in-orbit testing, and satellite decommissioning. Previously, he worked on satellite design at EADS Astrium (now Airbus Defence & Space) in France.

Commenting on the appointment, Mark Rigolle, CEO of ABS, stated: "We are delighted to welcome Matthieu to ABS as our Chief Technology Officer. His extensive experience in satellite procurement, operations, and program management will be instrumental in driving our vision forward. As ABS continues to expand and enhance its global satellite services, Matthieu's leadership will ensure we maintain our commitment to delivering secure, reliable, and agile solutions to our customers."

"I am excited to join the executive team at ABS during this pivotal moment. I look forward to working alongside such a talented team to drive innovation and efficiency while contributing to the company's continued success. My sincere thanks to Mark and the team for this incredible opportunity," said Matthieu Boutrolle,

Matthieu Boutrolle

Steve Collar Joins SWISSto12's Board of Directors as Chairman

Renens, Switzerland, March 5, 2025 - **SWISSto12**, announced that former SES and O3b Networks CEO, Steve Collar, is joining the Board of Directors of SWISSto12 and will serve as Chairman.Steve brings more than 30 years of satellite industry experience including 5 years at the helm of SES, one the of world's largest satellite businesses and more than 6 years leading O3b Networks from initiative funding through scale up, constellation launch and commercial success as the fastest-growing operator in the industry.

Roland Loos, Chairman since 2016 and industry veteran, continues as a member of the Board and will hand over the Chairman position to Steve Collar.

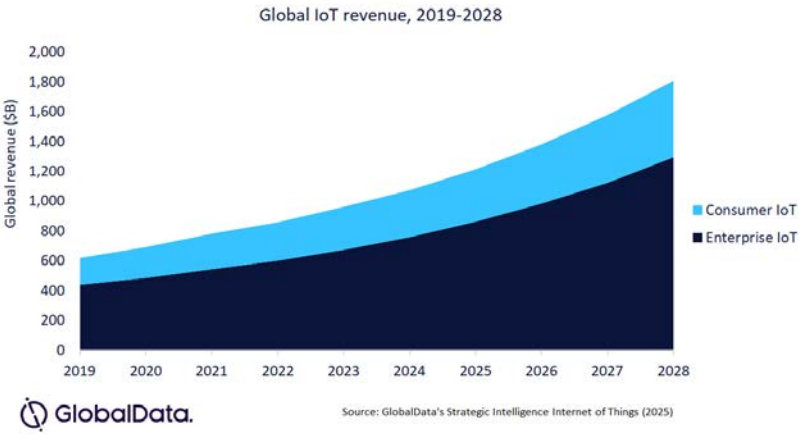
Emile de Rijk, founder and CEO of SWISSto12 said "I really look forward to partnering up with Steve on the next steps of SWISSto12's growth journey. He brings with him tremendous technical, entrepreneurial, management and industry experience along with a positive mindset that I strongly relate to. Our industry is currently going through a significant amount of change and SWISSto12 is determined to play a major role in enabling the future of satellite communications globally."

SWISSto12 is a manufacturer of advanced satellite RF products, payloads and systems, including the HummingSat: a small yet powerful geostationary telecommunications satellite developed in collaboration with the European Space Agency (ESA) through its public-private-partnership program.

Steve Collar

Global IoT Market to Surpass US$ 1.8 trillion in 2028 Driven by 5G and AI

London, UK, March 18, 2025--The global Internet of Things (IoT) market is poised to grow at a compound annual growth rate (CAGR) of 13.5% from US$ 959.6 billion in 2023 to US$ 1.8 trillion in revenue in 2028. This growth is driven by the rise of enterprise applications, enhanced by technologies like 5G and AI. While IoT presents significant opportunities, challenges such as security concerns and fragmented standards must be addressed to ensure its widespread adoption and success, says GlobalData, a leading data and analytics company.



GlobalData's latest Strategic Intelligence report, "Internet of Things," reveals that enterprise IoT will account for 72% of market revenue by 2028, up from 70% in 2023, while the consumer segment will make up 28% in 2028, down from 30% in 2023.

New terrestrial wireless and satellite technologies will expand IoT connectivity options. Enhanced 5G now supports IoT use cases that demand lower complexity, reduced cost, and decreased power consumption. 5G-satellite non-terrestrial networks (NTN) is a new access technology that will enable devices in very remote locations to upload and download data via satellites. These new access technologies are ideal for devices that require continuous connectivity and extended battery life but do not need the full range of 5G features, such as higher bandwidth and lower latency.

Artificial intelligence (AI) is increasingly important as an IoT catalyst. Artificial Intelligence of Things (AIoT) involves embedding AI into IoT devices, software, and services. Combining data collected by connected sensors and actuators with AI supports automated operations and predictive maintenance. AI can run in the cloud, on IoT devices directly with some limitations, or on both the cloud and the device.

William Rojas, Research Director, Strategic Intelligence at GlobalData, comments: "AIoT technologies in the form of embedded AI acceleration microprocessors, combined with the addition of new wireless access technologies, will act as a further catalyst for IoT adoption across enterprise and consumer sectors. Deployments that might have initially used only one type of IoT sensor are expanding to include a wide range of sensors as the cloud analytics processing capability continues to expand."

Security remains a concern for IoT deployments. The fragmented security standards landscape and weak security of many IoT devices could hold back further IoT adoption. Despite the ongoing industry efforts, there are no globally accepted IoT security standards. Many IoT devices have limited computing capacity and cannot run effective security software, leaving them and the networks to which they are connected vulnerable to cyberattacks.

Rojas concludes: "Unlike other technological methods and tools such as AI, cybersecurity, and cloud computing, IoT is a digital ecosystem consisting of interdependent connectivity and data layers that aggregate, store, and process telemetric, image, and video data from IoT sensors. Embedded AIoT can also play a role in enhancing security at the IoT device level. Where more heavy compute resources are needed with low latency, then edge computing will be the best option."

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New Research Shows We Need to Rethink Approach to Resilience and Security

Gloucester, UK, March 18, 2025 - Over eight in 10 (82 per cent) believe organisations are not investing enough in cybersecurity, particularly when it comes to protecting critical national infrastructure (CNI) according to data released today by Ground Control.

The research, commissioned by IoT, M2M and critical communications service and technology provider, Ground Control, quizzed over 500 people in industries such as healthcare, energy, utilities, water, waste, transport, financial services, manufacturing and agriculture.

The poll comes at a time when cyber-attacks remain one of the leading threats to national security and the technology landscape continues to evolve at breakneck speed.

Out of the 500 respondents surveyed, two thirds (62 per cent) said they would feel safer knowing that critical national infrastructure had back up satellite communications in the event of a cyberattack or connectivity failure, while 46 per cent said they had 'little or no confidence' in the healthcare industry's cyber security measures. No sector scored higher than 31 per cent when it came to moderate or full confidence in their organisation's cyber security measures.

Key survey findings

- 82 per cent of respondents believe organisations are not investing enough in cybersecurity for Critical National Infrastructure (CNI).
- 62 per cent would feel safer knowing that CNI had back-up satellite communications in the event of a cyberattack or internet failure.
- 46 per cent have 'little or no confidence' in the healthcare industry's cybersecurity measures.
- No sector scored higher than 31 per cent for moderate or full confidence in cybersecurity protections.

Higher-income households (£140,000+) expressed more concern over cybersecurity than those in lower-income brackets (£20,000-).

Respondents over 60 years old were more concerned about cybersecurity than those aged 18-29.

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The Power of Premium OTT

Singapore, March 5, 2025 – The Asia Video Industry Association (AVIA) has published its latest study, "Premium OTT: Building Its Rightful Place in the Digital Market," focusing on Indonesia and Thailand. This comprehensive research highlights the superiority of premium OTT services in these markets and their potential for advertisers.

Consumers in each market believe that premium OTT services, such as Disney+, Netflix, TRUEID, Vidio and Viu, who offer 'professional videos', unequivocally deliver Quality Content, keep peoples' Attention and are considered Time Better Spent than user-generated content (UGC) and social media platforms (social videos) where Negative Emotions dominate.

Key insights from the study include:

Quality of Content: Almost 90% of all viewers say that professional videos offer better video quality.

Positive Emotions: Professional video users report stronger emotions, with all video users generally experiencing more negative emotions after watching social videos. All video users also agree that time is better spent when watching professional videos compared to social videos.

Smart TV Usage: The increasing adoption of Smart TVs among professional video users is creating more opportunities for Connected TV (CTV) advertising. This shift allows advertisers to leverage advanced targeting and interactive ad formats, enhancing viewer engagement and delivering more personalized ad experiences.

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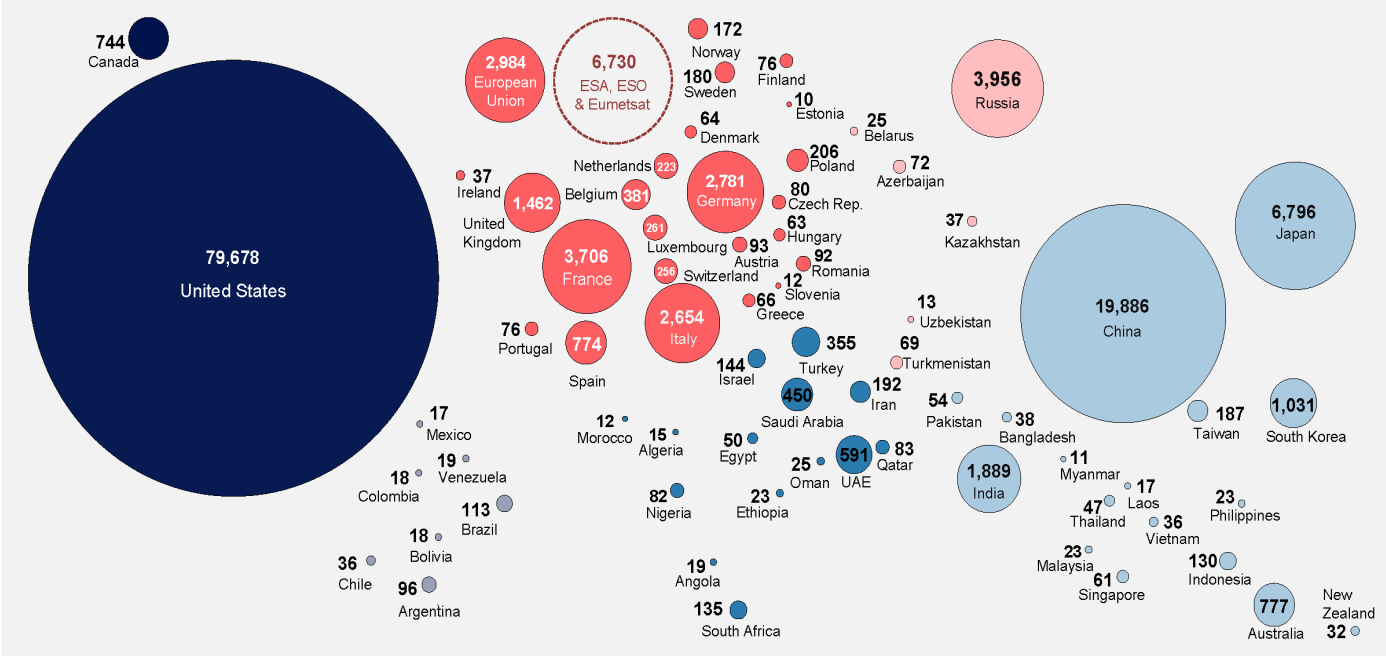
VITAL STATS

Global Goverment Space Program Expenditures in 2024 (in US$ millions)



Government Space budgets reached US$ 135 billion in 2024, a 10% increase compared to 2023. Defense spending, now the majority of budgets at $73 billion (54%), underscores space's growing importance as a contested and strategic domain according to Novaspace. Graphic courtesy of Novaspace.

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