How is the Innovation in Maritime Communications Driving the Future of Shipping?
What We Do

- First-class strategic consulting, development of comprehensive research reports and executive-level events
- Mission to support decision-making for private and government organizations in the satellite industry

Who We Are

- Euroconsult is a global expert in satellite market consulting & analysis
- Established in 1983, independently owned and operated
- Four offices: Paris (HQ), Montreal, Washington DC, and Tokyo
- Over 560 customers in 50 countries

Euroconsult is trusted by over 560 clients in 50 countries
RELATED RESEARCH REPORTS

Maritime Telecom Solutions by Satellite
Prospects to 2024

2015 Edition*
Comprehensive analysis & forecasts for maritime satellite communications - Merchant Shipping, Fishing, Passenger Ships, Leisure Vessels, Offshore

*Release soon

High Throughput Satellite Systems
Prospects to 2022

2014 Edition
A vertical market analysis of major drivers, strategic issues and demand take-up for High Throughput Satellites

*Release soon

Mobile Satellite Communications Markets Survey
Prospects to 2024

2015 Edition*
Comprehensive expert analysis & forecasts for the MSS sector

*Release soon

Prospects for In-Flight Entertainment and Connectivity
Prospects to 2024

2015 Edition*
Sector dynamics, analysis and forecasts addressing the IFEC market for commercial airlines and business aviation

*Release soon
Facts & figures for the current market*

- **121,000** addressable vessels
- **70+** VSAT service providers
- **13,000** VSAT terminals
- **352,000** MSS terminals
- **$760 million** revenues for satellite operators

- A historic market for mobility
- Strong change in usage pattern. Broadband is now the key revenue generator
- Legacy MSS terminals still stand for the bulk of installation
- VSAT is becoming more popular especially for high end market segments
- HTS will significantly improve the VSAT service quality and reduce the cost per bit – key driver for the growth in the future

*as of YE 2014*
Maritime Satcom Roadmap

Inmarsat founded as an IGO + narrowband services for maritime


C-band maritime VSAT

Ku-band maritime VSAT

Ka-band maritime VSAT

HTS Ku-band VSAT

Launch Iridium, Globalstar and Orbcomm LEO constellations

FleetBroadband

Inmarsar GX Ka-band broadband

Iridium NEXT devices

Launch of XpressLink

Thuraya Maritime broadband

Launch of MSS BB devices

Iridium OpenPort

Thuraya Atlas IP/ Orion IP

1st wave of MSS BB devices
HTS systems to increase capacity over oceans to over 65Gbps by 2016

The Northern Atlantic and the Pacific Ocean with strongest capacity increase

Ka-band to grow from ~1Gbps in 2012 to over 40Gbps by 2016

Ku-band to almost triple over the next 5 years

Inmarsat (GX) and Intelsat (EPIC) leading operators, but a number of regional projects do exist in the market
New Applications enabled by HTS

- Significant bandwidth increase in the next decade

- Must-have solution for crew and passenger communications
- Reducing IT investment
- Improving efficiency

- Various sensors on vessels
- Supporting a large variety types of applications including maintenance, remote diagnostic, performance optimizations, etc.
- Content is the key element for differentiation for SPs
- Lead to incremental revenue from existing customers
CONTACTS

Wei Li
li@euroconsult-ec.com

Paris Office
86 Blvd de Sébastopol
75003 Paris - France
T: +33 (0)1 49 23 75 30 - F: +33 (0)1 48 05 54 39

www.euroconsult-ec.com