



BEREC STAKEHOLDERS FORUM MEETING

**GERRY OBERST
ESOA REGULATORY WG**

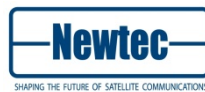
Riga, 25 September 2013

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European Satellite Operators Association

ESOA Members



The Satellite Sector adds value for Europe



Serving the EU:

TV - Broadband - Disaster Management - Development - Maritime
Communications - Security - Energy Efficiency - Climate Change

- **EU is the hub of the global satellite industry:**
 - ⇒ Operators, launchers, manufacturers, insurance...
- **Significant economic contribution:**
 - ⇒ Recent Booz&Co report identified direct & indirect contribution of 200,000 highly skilled jobs, *€10bn revenue with growth potential to €100bn for EU economies*
- **Private investment today for the future:**
 - ⇒ Euroconsult figures indicate approximately 200 GEO satellites are on global order to 2021 = almost *\$70bn of satellite operator investment alone*
- **ESOA members deliver value-added services:**
 - ⇒ Oxford Economics found that satellite operators investments provide a massive multiplier in the downstream space sector
 - ⇒ Euroconsult found that *every €1 of public investment into satcoms generates €47 of downstream turnover!*

Role of Satellite in Achieving Europe 2020: (I) Digital Agenda for Europe

DAE 2013 OBJECTIVE:

SATELLITE BB IS AVAILABLE THROUGHOUT EU28

- Offers go up to **20Mbps** broadband access
+ very often include triple play
 - Over 2,000 TV & radio channels
 - Example price for 20Mbps: around €29.90 per month
- ⇒ Satellite helps EU regions to achieve 100% broadband coverage
- ⇒ E.g. Auvergne: 2009 Regio Star Award for “Broadband” from DG REGIO

An advertisement for satellite broadband services in Auvergne, France. The background is dark with a satellite in orbit. The text is in white and green. At the top, it says '...sez à la vitesse supérieure'. Below that, 'Toute l'Auvergne en haut débit !'. A large green '0,4%' is followed by 'DES FOYERS EN HAUT DÉBIT SATELLITE'. To the right is a graphic of a satellite dish and a satellite. Below that, 'Des aides pour mieux s'équiper' and 'Par souci d'égalité, nous avons décidé des aides publiques pour vous soutenir dans cet investissement.' At the bottom, there is a green button with 'Pour en savoir plus et tester votre éligibilité' and a green arrow icon. Logos for 'connexion verte' and 'als@tis' are at the bottom.

Role of Satellite in Achieving Europe 2020: (II) Next Gen. Services, Connected Continent



Consumers constantly demand better quality TV:

Satellite leads the way in transmission in the latest digital formats: HDTV/ UHDTV/ 3D TV

Delivering Linear TV anywhere:
The **core Satellite strength**

Consumers demand content on all devices:

TV content delivered via satellite can be viewed on multiple devices thanks to new satellite standards

- Satellite brings bandwidth-hungry content to the network edge closer to users, so relieving the load on terrestrial networks
- Hybrid solutions such as satellite + WiFi optimise cost & spectrum efficiency

Concerned by the institutional role of EU Member States

| Bodies | Nature |
|---------------------------------|--|
| SPECTRUM | |
| ⇒ RSPG | <ul style="list-style-type: none"> ◆ Several opinions & reports of relevance to satellite: spectrum demand or broadband wireless < 6 GHz, interference management, LSA, WRC-15, etc. |
| ⇒ RSCom | <ul style="list-style-type: none"> ◆ Drafted EC harmonisation decisions of high relevance to satcoms, e.g. 2008/144 /EC on BWA in C Band or 2007/98/EC on MSS 2 GHz |
| ⇒ CEPT | <ul style="list-style-type: none"> ◆ EFIS & EC Inventory ◆ Harmonisation of licensing rules across 48 countries (e.g. ESOMPs) |
| OTHER ISSUES | |
| ⇒ BEREC | <ul style="list-style-type: none"> ◆ Licensing rules ◆ Competition, Technological Neutrality ◆ Net Neutrality ◆ Implementation of EU Reg. Framework 2009 |
| ⇒ COCOM | <ul style="list-style-type: none"> ◆ Technical Committee on ICT rules |
| ⇒ Trade Policy Committee | <ul style="list-style-type: none"> ◆ Granting negotiating mandates to EU Commission |