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VSAT2012

VSAT Vertical Value

12-14 September 2012
Lancaster London Hotel
London, England

- ***Next Generation Utility Opportunities***
- ***GSM & Small Cell Backhaul Optimisation***
- ***MOFA & Foreign Government Networks***
- ***Global Mining & Oil & Gas Specialisations***
- ***Ka-band & next generation spacecraft for VSAT***
- ***Maritime VSAT Market Revolution & Strategies***
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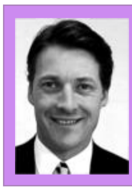
The 14th Annual Conference

VSAT2012 - Pre-Conference Workshops



VSAT Market & Technology Workshop for Non-Technical Professionals

Tuesday 11th September 2012

Session One - Delivering the Latest VSAT Market and Technology Issues

1. Market overview and users
Global overview, market size & manufacturer shares
Growth patterns by region & industry sector
Decision making processes

2. VSAT and Satellite fundamentals
Acronyms, basic system structures, network topologies & access schemes
The broadcasting and multicasting fit

3. Economics of VSATs
Basic costs, mesh, star and hybrid
Product solutions, TCO, service, maintenance, repair & upgrades
Software maintenance and enhancement, long term implications

4. The Sales Process
Value propositions, customer loyalty, access & transport, fragmented markets and customers
Long term considerations when building a business
Pilot networks, timescales

Workshop Objectives: To assist new and potential telecoms users, managers and operators in further developing their knowledge of the VSAT industry. The aim is to provide both a business and a technology focus with an overall understanding of the latest in the VSAT marketplace, including what elements to consider when specifying a network and how to procure a service or product. The workshop provides a fast track of information essential in enabling today's operator and user make better informed purchasing decisions.

Session Two - Overview of New Technology Demands: IP and VSATs

5. Applications and technology fit
Applications, IP/Internet/Intranet and LANs, voice/fax, transactional, high capacity
Value based applications, streaming media, content and application hosting

6. How to procure services and products
Sourcing a service provider, requirements, supplier due diligence
Integrators, procurement, shared versus dedicated networks
Writing an RFP, network roll-outs

7. New and emerging technologies
Broadband platforms, Ku/Ka or hybrid, timescales
Target markets, bandwidth efficiencies
IP networking enhancements, optimisation techniques, bandwidth re-use
The scale of the opportunity, users and usage, sales strategies and channels, SAC

Presented by Simon Bull. Simon is a Senior Consultant at COMSYS and specialises in corporate networking technologies, particularly direct to business satellite systems (VSATs). He has been primarily responsible for the multi-client VSAT studies undertaken by the company during the last twenty five years, including the company's 11th Edition of the VSAT Industry Status Report and 2nd Edition Maritime VSAT report. His work at COMSYS also involves him in advising clients on the regulatory, strategic and business planning, administrative and operational aspects of satcoms systems and products. Simon also founded the Global VSAT Forum, which he Chaired for the first two years.

Satellite Communications Fundamentals for Non-Technical Managers

Session One

1. Introduction: What is satellite communications?
Types of spacecraft, history and acronyms

2. What is a Satellite?
Spacecraft, payload, antennas, footprints & control

3. Satellite Orbits
Basic orbital mechanics, GSO, inclined orbit operation, non-GSO

4. The Technical Bits
Link budgets, EIRP & G/T, bandwidth, propagation, analogue/digital transmission, frequency bands, modulation, access schemes, error correction

5. The Global Marketplace
Satellite operators & manufacturers
Broadcasters, content providers, services
Legal and regulatory, insurance, market research, financing

6. Broadband Applications
Internet/IP, latency issues, the IP revolution

7. Financial Aspects
Satellites, launchers, insurance. Transponder lease rates, earth stations & services. Financial services & due diligence

Objectives of the Workshop:
Whether you are new to the industry or simply looking for a thorough easy-to-understand overview of satellite communications, then this workshop is for you. This workshop will examine the core principles and dynamics of satellite communications and provide a fast track of information essential in enabling today's non-technical executive keep abreast of the current and changing marketplace.

Session Two

8. The Developing World
Teledensity levels, definitions of universal service, affordability and payment methods, service requirements

9. Regulatory Issues
ITU, regional and national service regulators
Service and frequency regulation. Earth station type approvals, export controls, security issues, safety and radiation hazards

10. Terrestrial Competition
Submarine cables, complementarity, WiMAX

11. Forecasting Future Trends
Fibre penetration, cost and pricing trends, content delivery via IP. Higher frequencies (Q/V/W bands)
Globalisation of satellite operators
The role of satellites in 10, 20 and 50 years

Presented by Jeremy Rose, Senior Consultant responsible for space segment consultancy at COMSYS. He specialises in strategic planning, financial and marketing due diligence, training and regulatory work and legal expert testimony and reports. His clients are mostly satellite manufacturers and operators, legal firms/attorneys, financial institutions and governments. Mr Rose founded COMSYS in 1982 and is a member of the SSPI and the American Institute of Aeronautics. He has written more than one hundred journal and conference papers on satellite communications issues.

Registration for the workshops, which will run concurrently, will start at 8.00am. The sessions will commence at 9.00am and close at 5.30pm. Morning coffee, lunch and afternoon tea will be served during intervals.

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Technology Innovations

Day 1

Wednesday 12th September 2012

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8.00 Registration & Coffee

8.55 Opening Remarks from the Chairman

Jeremy Rose, Senior Consultant, **COMSYS,** UK

09.00 A Tipping Point

Simon Bull, Senior Consultant, **COMSYS,** UK

The VSAT industry has entered a period of major change - one that many VSAT service providers, satellite operators and system vendors have been anticipating and which some have already begun to experience. As in the past, these changes bring disruption and opportunity resulting in casualties and successes. The details behind all this are complex and contradictory - competing technologies will catalyse growth in some areas and destroy business in others. This last happened at the turn of the century and VSAT prospered, now we need to consider what the next ten years will demand of the technology.

09.40 Keynote: The View From Jupiter

Pradman Kaul, CEO, **Hughes,** USA

Consumer and enterprise markets present many similar challenges, yet also each segment has its own unique demands and both have an influence over the overall direction of the industry. After three decades of pushing the envelope for the VSAT industry and constantly delivering innovations in hardware and services that stretch satellite technology to challenge and complement ever more capable and widespread terrestrial networks, what does Hughes believe the future holds?

Morning Tea & Coffee — **Sponsored by** XipLink Maximum Capacity

10.45 A Broader Frequency

Dave Bettinger, CTO, **iDirect,** USA

Broadband is not defined by the band, but by the bandwidth. Despite growing use of Ka-band, other frequencies have their strengths and physics ensures that these will always remain valid for a good number of customers - often defined by those with the highest value applications. Platforms need to be flexible and adaptable to fit in with new satellite architectures without neglecting specialised networking needs across the vast spectrum of customers that employ VSAT technology in many mission critical applications.

11.20 Padding the Envelope

Serge Van Herck, CEO, **Newtec,** Belgium

Is DVB-S2 truly the end of the line and the ultimate in bandwidth efficiency as was suggested when it was launched? Perhaps not, already there have been some incremental improvements with new gains being added step-by-step over the past year. The DVB Project is working on new designs and private companies, like Newtec, are also pushing the boundaries within the DVB standards process as well as on their own initiative. It is important for operators and users to understand what they can expect the technology to deliver long term and this presentation gives us a glimpse into the future.

11.55 Exceding Expectations

Mark Dankberg, CEO, **ViaSat,** USA

With speeds of 12 Mbps, satellite internet services in North America now directly challenge many DSL offerings, but is this too much of a good thing? Channels to market are crucial and major incumbents don't necessarily want to hear of VSAT services that can present a purchase dilemma for a consumer. However, as plans progress for even more enhanced offerings in the next generation of broadband satellite platforms, the strategic positioning of these services will have to change, possibly in a radical way, as the technology moves up from being the solution of last resort.

Lunch — **Sponsored by** ViaSat

14.00 Taking the Band Professional

Nicholas Daly, Managing Director, UK, **Eutelsat,** France

Eutelsat has made a strong play on Ka-band in Europe in order to lower the barrier to entry for satellite broadband for users in unserved and underserved areas. However, the KA-SAT High Throughput Satellite is about much more than consumer internet - it is also developing into professional applications including enterprise broadband access, civil security and video file transfer for newsgathering. Eutelsat has also launched a new platform for Africa, called IP Easy, aimed at delivering broadband to high-end consumers and SMEs.

14.35 Insatiable Defines The New Power Generation

Daniel Enns, Senior Vice President, **Comtech EF Data,** USA

Demand for bandwidth appears to be insatiable. Despite intense pressure on service charges & hardware costs, overall service revenues continue to grow driven by an inexorable rise in bandwidth consumption. This trend is constantly changing the market characteristics and, consequently, the key issues that an operator should be in touch with. Compression, optimisation, intelligent resource sharing and basic transmission speeds built around the most advanced techniques are all vital areas, but what are the facts behind the need for bandwidth, are there regional differences and what are the longer term implications?

15.10 Do I Detect Movement?

Erez Antebi, CEO, **Gilat,** Israel

With all the change and uncertainty surrounding telecoms markets in today's world, there's one thing that almost everyone agrees on - mobility will be a key area of development for satellite communications. A great many military and civilian applications demand mobile or transitory capabilities that even cellular and wireless technologies either struggle or fail to meet and so satcoms on the move has become a key differentiator for many in the business.

Afternoon Tea & Coffee — **Sponsored by** XipLink Maximum Capacity

16.10 Commodity Futures

Aslan Tricha, Vice President, Global Sales Engineering, **SES,** Luxembourg

As both average data rates and consumption volumes rise, the spacecraft operators are finding themselves in the front line of customer expectations at all levels. Some would argue that satellite capacity prices have to fall for the market to continue to grow whilst doomsayers will suggest that the technology's limitations herald an inevitable decline. This presentation looks to the future development possibilities, what are the options, the potential gains versus disadvantages and how the VSAT operator's raw commodity is likely to change in form, function and price in the years to come.

16.45 Architectural Visions

Jay Yass, Vice President, Global Accounts and Strategic Sales, **Intelsat,** USA

To paraphrase a well-known expression, it's not what you have, but how you use it and satellite capacity, coverage and frequency is no exception. Raw bandwidth is one thing, but how it should all come together, the way in which it is packaged and sold together with considerations of ground segment variations and future needs are all vitally important. In the near future, satellite operators will begin to face vastly different challenges and some radical decisions that will affect both their businesses and those of their customers.

17.20 Small Steps Towards Risk Mitigation

David Gelerman, CEO, **Advantech Wireless,** Canada

The structure of the VSAT industry is continually changing as new technologies, frequencies, applications and platforms are brought to market. Hardware cost, particularly the initial investment required by a new or expanding operator, has been falling over the past few years. Consequently, the questions are to what extent do costs have to be driven down further, do we already have the products in place to enable greater innovation on the part of service providers and what are the implications for the market.

18.00 Close of Day One

18.30 Cocktail Reception

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Markets & Operations
Day 2

Thursday 13th September 2012

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08.00 Registration & Coffee
08.55 Opening Remarks from the Chairman

Andrew Wallace, Director, **Hermes Integration,** UK

09.00 There's Gold in Them Hills

Yoel Gat, CEO, **SatixFy,** Hong Kong SAR

Satellites provide bandwidth on which VSAT feeds and available capacity is growing as the spacecraft operators move up the frequency ranges, but access to this resource is dependent on many other technologies and innovation across all levels of the industry. However, the VSAT market does not enjoy the same economies of scale that mainstream product and component manufacturers can exploit, even in the consumer segment. There is, however, a solution that could bring the benefits of scale and ensure the gold that new satellite capacity offers is maximised for the benefit of all. The diamonds which are satellite's USPs will not be forgotten either by someone who has broken the rules before.

09.35 Flying Low

John Finney, CCO, **O3b Networks,** Jersey

Geostationary orbits have their advantages, but one of them is not the round trip delay of a signal. There are advantages to flying spacecraft lower - fibre-like latency from a satellite service is undeniably attractive - but equally there's a price to be paid. In a rapidly changing communications infrastructure, which applications are expected to demand the unique features of a MEO system? Where will the customers come from and will the service be a complement or a threat to traditional VSAT solutions? These are a few of the key questions need to be answered.

Morning Tea & Coffee — **Sponsored by** XipLink

10.45 Storming the Barriers

Emil Youssefzadeh, Founder & CEO, **STM Group,** USA

Globalisation has brought greater access across markets, but the satellite industry generally and the VSAT business in particular continue to open the doors into many opportunities and areas that would otherwise be left waiting. Sometimes the only effective strategy is one that combines technology, initiative and investment to bring change in a dramatic and worthwhile way.

11.20 Liquid Bandwidth: Sweating the Asset

Shivaji Chatterjee, Vice President Enterprise Services, **Hughes India,** India

Nothing makes or breaks a VSAT business more than bandwidth and capacity management. Faced with seemingly overwhelming competition from the terrestrial operators, Hughes India has developed bandwidth management and networking expertise into a major market differentiator that it has been able to sell as a credible and recognised value proposition.

11.55 Selling the Cell

Malek Shahid, Senior Strategist, Wireless, **Alcatel-Lucent,** UK
Richard Deasington, Director, Vertical Marketing, **iDirect,** USA

Mobile backhaul is nothing new, but even as we think we know about the methods and dynamics of rural deployments the underlying cellular technology is changing fast - as is mobile operator thinking. Self-deployable and plug & play, Femtocells support extension and overflow capacity so pose different QoS and reliability challenges on VSAT making optimisation and experience critical for success. Alcatel-Lucent has been leading the charge towards Femtocell systems, working with many of the world's largest mobile operators as well as iDirect in the VSAT market to enable coverage in many marginal, but extremely attractive areas of expansion.

Lunch — **Sponsored by** SES

14.20 That's Another Fine Mesh You Got Me Into

Bill Green, Global Account Director, **Hermes Datacommunications International,** UK

Oil & Gas isn't all about stabilised systems in the major offshore fields, but many of the large land operations are just as remote and no less demanding than their floating compatriots. Hermes has made this segment their own in many ways, crafting small, highly functional mesh networks for major oil companies in locations from Algeria to Azerbaijan and all in between.

14.55 Preaching the Ministry of VSAT

Michel Verbist, Head of International Business Development, **Orange Business Services,** Belgium

Connectivity for Ministries of Foreign Affairs is an established sub-segment of demand that highlights the benefits of satellite - reach, independence and security - that has resulted in governments worldwide adopting VSAT solutions. None has been more successful in this area than Orange Business Services and now that fibre is also being increasingly incorporated into these networks the company's core carrier business is able to leverage its position. The integration of VSAT services within a carrier is sometimes an uneasy one, but the role of VSAT within OBS has strengthened steadily over the past five years.

15.30 Delivering Diplomatic Data Dispatches

Jorg Leenaards, CIO, **Belgian Ministry of Foreign Affairs,** Belgium

Aside from tactical military communications, no other agency depends more on fully secure networking nor are the potential consequences of failure more dire than a government's Ministry of Foreign Affairs. Many countries employ VSAT services within the networks that connect their embassies across the globe and Belgium makes extensive use of its satellite network provided by Orange Business Services. So where and why does the technology make commercial and operational sense and what features does it bring that make it compelling in this niche segment of the government VSAT market?

Afternoon Tea & Coffee — **Sponsored by** XipLink

16.40 Behavioural Change

Riyadh Al Adely, CEO, **SkyStream,** UAE

In almost every region, operators are facing the harsh reality that simple broadband services have little staying power against terrestrial solutions when available and the onslaught of Ka-band consumer VSAT platforms are about to tilt the landscape even more. The move to value-added application support, niche segments and custom networking presents a new set of challenges, but SkyStream began this process a few years ago and is now able to describe the path, share the painful moments, speak of the benefits and showcase the results.

17.15 Mine's a Large One

David Levinger, Sales Manager: Commercial Satcom Solutions, **Astrium Services,** France

Across the world the mining business is booming with new mines being established and older suspended projects being revived as economic viability rebounds as a result of strong commodity markets. This is nowhere more true than in Africa where the great resources of the continent are seen as a major economic pillar for many countries. VSAT is in extensive use, but the market is highly fragmented across operators and service providers with just a handful of operators standing out as specialists in this vertical, one of which is Astrium Services.

17.50 Close of Day Two

18.30 Cocktail Reception — **Hosted & Sponsored by** Sea Tel COBHAM

Customer Applications
Day 3

Friday 14th September 2012

VSAT2012

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08.00 Tea & Coffee
08.55 Opening Remarks from the Chairman

David Hartshorn, Secretary General, **Global VSAT Forum,** UK

09.00 Banding Together

Leo Mondale, CEO, Global Xpress, **Inmarsat/Global Xpress,** Switzerland

MSS L-band service has its advantages, but plentiful bandwidth is not one of them. Inmarsat essentially owns the mobility brand in many key market segments, but all of these applications are experiencing exploding demand for bandwidth and the Ka-band Global Xpress service is the company's answer to this dramatic challenge to its traditional L-band offering. However, this is much more than simply a technological step up, it's about a radical change in where, when, why and how to sell a new Ka-band spotbeam service that offers some unique attributes and a major restructuring of a market environment.

09.35 Trading the Seas

Alberto Boratto Carpene, Business Development & Board Member, **Milano Teleport,** Italy

The maritime VSAT service environment looks set to change fundamentally over the next few years. Channel positioning, teleport infrastructure, investment criteria and customer ownership are all possible elements that may be caught in the mix. Large and small operators are likely to face difficult, but often very different decisions. Milano Teleport has a substantial maritime business, but sees its strength as a trader of maritime services - a strategy that is not necessarily tied to its own infrastructure nor to any particular channel model. So where is the value in this position and what preparation is required?

10.10 Attention to Detail

Bertrand Hartman, CEO, **OmniAccess,** Spain

From Royal Family yachts to the Smith family's cruise, everyone wants to be connected when they take to the ocean, but is delivery of bandwidth sufficient or is much more required of an operator? As with all markets, maritime VSAT services are being increasingly commoditised, but there will always be room for the independent service provider willing to provide a tailored, flexible, responsive and integrated solution. After all, ultimately customer relationships are what really make a sale and these are based on trust resulting from demonstrable expertise.

Morning Tea & Coffee — **Sponsored by** XipLink Maximum Capacity

11.10 Krafting Kreative Ka-pabilities

Rick Hodgkinson, CEO/President, **Galaxy Broadband,** Canada

Any small or medium sized operator might be forgiven for thinking that the move to Ka-band will sap their value and force them into a low margin, high volume business. Some will find themselves in this situation, but this need not be the case as Galaxy Broadband is showing in Canada. A well executed strategy has allowed the company to leverage the cost advantages of Ka-band, and the buying power its use have brought, into specialised, high value niche segments of Canada's rich resource market and create a distinct and sustainable competitive advantage.

11.45 Playing to the Cloud

Mike Tippets, Vice President Hughes Solutions Group, **Hughes,** USA

Cloud based services are seen as the way of the future and a driving force behind the need for persistent and ubiquitous communications. Additionally, the penetration of new devices is pushing greater demand for video at different levels of the enterprise. VSAT is becoming a key element to provide credible total coverage, greater network resilience and more efficient delivery options. For example, retailers in the United States are not only evaluating front of store IP video applications, but ways in which video can augment and improve environments and systems behind the scenes leading operators to offer enhanced ways to create and enhance the decentralised cloud service.

12.20 Empires and Umpires

Nadeem Khoury, Director SATCOM Department, **HICAP,** Saudi Arabia

Spotbeam satellites bring their challenges and advantages, some of which are a natural fit for military customers, such as the segmented coverage and high power levels that makes interference much less of a threat than on conventional spacecraft. However, in a mixed use environment serving different branches of the military and civilian government with fixed and mobile service, integrators and operators have to provide robust and secure partitioning to ensure both performance and network integrity. This is just one emerging requirement as Ka-band projects demand new skill sets and technology expertise that will challenge many layers of the satellite industry supply chain.

13.00 Closing Remarks & Questions

Close of the Conference

GVF Interference Prevention Summit

PLEASE NOTE: Participation is free to GVF Members and registered delegates of VSAT2012.
Delegates should confirm their intention to attend the luncheon and Summit to liz.grimm@gvf.org.

13.15 Working Lunch for GVF Participants

13.20 Summit Introduction & Opening Remarks

David Hartshorn, Secretary General, **Global VSAT Forum,** UK

The international VSAT industry is strategically ramping up plans to strengthen competitiveness by adopting quality-assurance measures. Implementation of carrier ID has already begun, supported by growing numbers of operators, value-added resellers and manufacturers. Technician certification, earth station approvals, and network validation are now part of the portfolio. And the fight for satellite C-band spectrum has escalated to include Ku and Ka-band. Attend this GVF Summit to learn the latest status and participate in shaping your company's and the industry's future.

13.50 Summit Sessions & Discussions

David Hartshorn, Secretary General, **Global VSAT Forum,** UK

The open-forum Summit will be chaired by David Hartshorn, Secretary General, Global VSAT Forum, with updates provided by industry leaders from key industry sectors, including

- **Bandwidth Providers - Avanti, Eutelsat, Inmarsat, Intelsat, SES and others**
- **VSAT Manufacturers - Gilat, Hughes, iDirect, Newtec, Viasat, and others**
- **Managed Network Service Providers and other value-added VSAT resellers**

16.00 Close of the GVF Summit

VSAT2012

14th Annual Global Industry Conference

11 & 12-14 September 2012
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☐ I would like to attend all 4 days - Workshop & Conference
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