Global military demand for commercial satellite capacity has fallen by an estimated 20% from a peak of 12.5 GHz in 2011 following tremendous growth over the previous decade, due in large part to lower usage of the U.S. DoD.

Looking forward, heightened global instability and security concerns are translating into prospects for an acceleration in defense spending globally, presenting opportunities through modernization of communications systems aboard military assets. Launches of next generation commercial satellites and procurements of next generation military satellite systems in the 2020-2022 time-frame represent potential game-changers for the milsatcom eco-system.

While military satcom requirements still carry a relatively high degree of uncertainty, these developments could combine to see satellite capacity demand in the segment surge by upwards of 60% over the coming decade. Bottom-up analysis of fundamental demand drivers within the leading military application segments reveals positive signs looking forward.

While commercial capacity demand began stabilizing in 2016, proprietary satellites are serving a growing share of total military FSS capacity requirements as defense agencies seek to optimize usage of these sunk-cost assets. As of 2016, proprietary systems were estimated to account for more than 35% of overall military satellite communications demand. The number of countries investing in proprietary military satellite communications systems, whether directly or through partnerships, has expanded heavily in recent years, and is projected to reach upwards of 30 countries by 2021, from a base of just 11 in 2006. Capacity supply from proprietary military satellites is expected to grow seven-fold over the same period to nearly 70 Gbps by 2021. Public-private partnership activity has also remained strong, with LuxGovSat and Japan’s DSN satellite projects as leading examples.
HIGHLIGHTS OF THE RESEARCH REPORT:

✓ Comprehensive bottom-up assessment of all relevant military satcom user markets:
  - Land Forces
  - Naval Forces
  - UAVs
  - Manned Aircraft
✓ In-depth evaluation of military satellite communication requirements for relevant applications
✓ Examination of current and future milsatcom equipment and ongoing procurement programs
✓ Assessment of proprietary and commercial milsatcom systems and capabilities
✓ FORECAST TOOL for future satcom demand scenarios

THE FORECAST TOOL
Given the event-driven nature of the milsatcom market and limited usefulness in projecting one possible future evolution, Euroconsult has developed a fully customizable forecast tool allowing the user to instantaneously measure possible demand requirement and impacts of any future conflict scenario over the next ten years, while taking into account all key trends, drivers and limitations of military satellite communications. The tool allows you to create scenarios with multiple conflicts, variable conflict types, and different conflict years for all segments, and simulates capacity (GHz) and throughput (Gbps) requirements by frequency band, military segment, and commercial vs. proprietary systems.

NEW IN THIS EDITON:

✓ Commercial capacity revenue forecasts (2016-2026)
✓ Military Satellite Supply database
✓ Recent contracts database – Fixed terminals
✓ Recent contracts database – Mobile terminals

WHO WILL BENEFIT FROM THIS REPORT:

✓ Military and Defense Agencies
✓ Satellite Operators
✓ Satellite Ground Equipment Manufacturers
✓ Satellite Service Providers
✓ Satellite Manufacturers
✓ ...and all other stakeholders in the military communications market
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