WORLD SATELLITE BUSINESS WEEK

PROGRAM GUIDE 2021

#WSBW

PROGRAM GUIDE 2021

www.satellite-business.com

PARIS Dec. 13-16, 2021

Bringing together the leading decision makers from the satellite communications and information sectors

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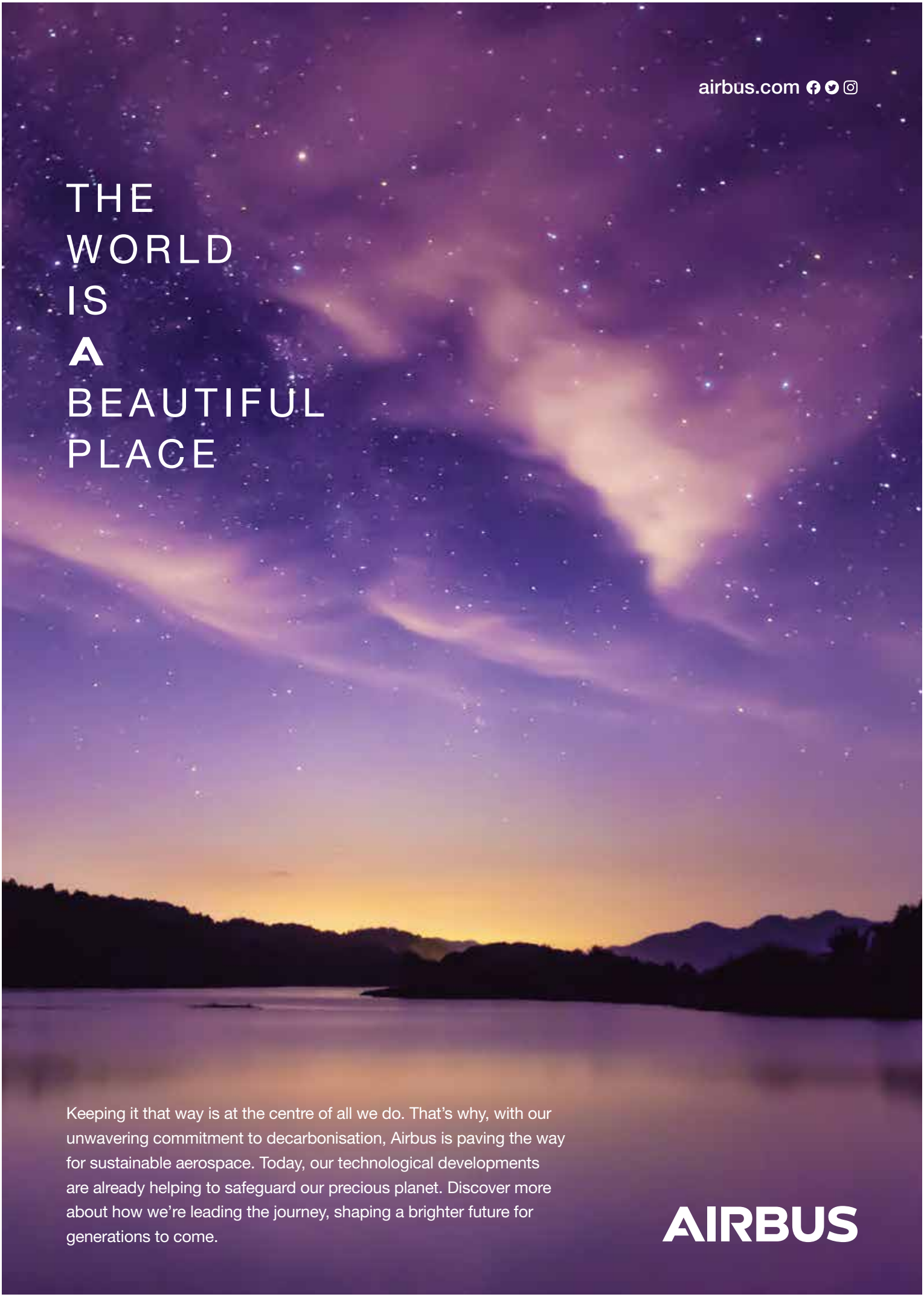
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WELCOME NOTE

Welcome to the 2021 World Satellite Business Week augmented edition, the distinctive annual executive meeting place for every leader from the global satellite connectivity and information business.

It's been 27 months since the World Satellite Business Week community last met in Paris, and it goes without saying that much has happened since.

The unprecedented covid-19 crisis arrived at a moment of deep transformation and innovation for the space industry. Fortunately, the impact on the industry was moderate, and even though some segments were more affected than others, the crisis has accelerated the global digitization of activities.
The demand for data and information and the need to connect the unconnected appear stronger than ever and undoubtedly stand as opportunities for the growth of the industry.

This, together with disruptive innovation and the emergence of new segments in the space ecosystem have resulted in large equity raising by a sizeable number of market players, and by a rise of M&A transactions. What was promises and early-stage projects have now started to turn into offerings and operational services, with examples such as the first broadband mega constellations and a number of remote sensing companies coming to light. It is thus in a context of transformation of the ecosystem, of business optimization and anticipated growth that the WSBW is held this year where this and more will be at the heart of the Summit discussions.

This 2021 World Satellite Business Week will for the first time be an augmented edition, taking place simultaneously in-person in Paris and all over the world online for all participants to attend, explore, and engage with. The high-quality four-day program, featuring 180+ leading executive speakers, will take place on two stages with parallel sessions. All sessions will be made available for replay through the conference application, which we invite you to download already now searching for "WSBW" on App Store or Google Play Store.

For more than two decades now the World Satellite Business Week has been the forum where the most influential business leaders from the entire satellite value chain from all world regions gather to shape the future of the industry and do business, bringing into light the most pioneering and remarkable companies and innovations.

We would like to warmly thank all the participants and above all our remarkable new and returning speakers and sponsors whose support is precious.

In this spirit, we hope you make the most of the market insights shared during the conference as well as the myriad of networking and business opportunities, and above all that you enjoy your stay in Paris.

Pacome Revillon
Chief Executive Officer, Euroconsult

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PROGRAM AT A GLANCE

Monday, December 13

CONCORDE (STAGE 1)

AIGLON (STAGE 2)

08:00 **Welcome Coffee** hosted by OneWeb

09:00

Opening remarks

09:15

World Satellite Business Week opening presentation

09:30

Keynote

09:50

Operator's strategic paths: C- view

09:50

The Smart Ship: connectivity and intelligence at sea

10:35 **Coffee Break** hosted by Communications & Power Industries (CPI)

11:05

Finspace startup pitch

11:05

Antennas:
way forward for satellite works

11:15

Government communications

Monday, December 13

CONCORDE (STAGE 1)

AIGLON (STAGE 2)

11:45
Space business financing: the new rules

12:05
IFEC: The new dawn after the storm

12:45 Luncheon hosted by Euroconsult

14:20
Global satellite businesses: new horizons

15:35
Fireside Chat

15:50 Coffee Break hosted by Curvalux

16:20
Fireside Chat

16:35
Finspace startup pitch

16:45
Launch service leaders: new launchers, new markets, new rules

16:25
Future of IFC: Exploring new technologies, new applications, and new markets

18:00 Cocktail reception hosted by ST Engineering iDirect

PROGRAM AT A GLANCE

Tuesday, December 14

CONCORDE (STAGE 1)

AIGLON (STAGE 2)

08:30 **Welcome Coffee** hosted by Microsoft Azure

09:00

5G, cloud apps: ready to seize the opportunity?

09:40

The growth agenda of leading connectivity service providers

10:15 **Coffee Break** hosted by United Launch Alliance (ULA)

10:45

Leading the satellite manufacturing race

10:45

Optical communications: open for business?

11:35

Connectivity & disaster monitoring for humanitarian organizations

12:00

Fireside Chat

11:55

Satellite Connectivity supporting developing economies

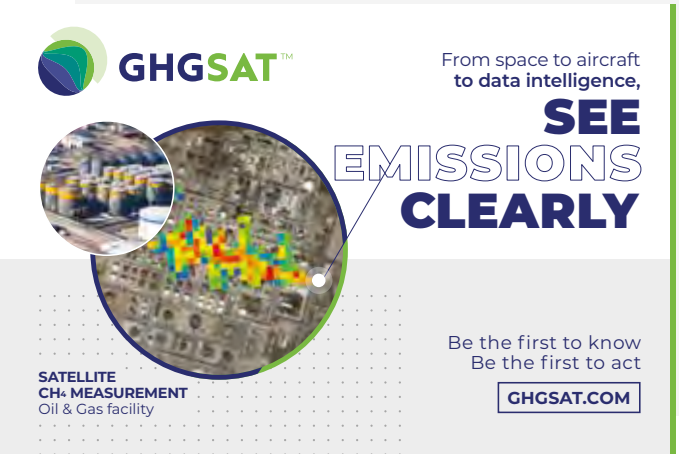
12:15

The day after tomorrow for smallsat manufacturing

12:35

Teleports' enhanced value proposition

13:00 **Luncheon** hosted by Euroconsult



Tuesday, December 14

CONCORDE (STAGE 1)

14:15
Virtualization, constellations, etc.: a revolution for the ground segment?

15:15
Finspace startup pitch

15:25
Financial analysts: valuing the new satellite proposition

15:55 Coffee Break hosted by Intelsat

16:25
Finspace startup pitch

16:35
Broadband constellations in the fast lane

17:35
Fireside Chat

17:50
Launchers of tomorrow

AIGLON (STAGE 2)

14:20
The future of connectivity: LatAm

15:10
Fireside Chat

15:25
The future of connectivity: Asia-Pacific

16:10 Coffee Break hosted by Intelsat

18:30 Cocktail reception hosted by Comtech

PROGRAM AT A GLANCE

Wednesday, December 15

CONCORDE (STAGE 1)

AIGLON (STAGE 2)

08:00 **Welcome Coffee** hosted by Safran Data Systems

08:45
Opening presentation

09:00
Leading operators' new horizons

09:00
Fireside Chat

09:15
Strategic directions for smallsat manufacturing

09:55
Finspace startup pitch

10:15
Fireside Chat

10:05
The rise of IoT

10:35 **Coffee Break** hosted by ImageSat International

11:00
Fireside Chat

11:05
The "in"-space logistics business taking off

11:20
Utilities: Using satellites for maintenance and risk prevention

11:50
New constellations capabilities & offerings

12:05
Space Surveillance & Tracking

Wednesday, December 15

CONCORDE (STAGE 1)

AIGLON (STAGE 2)

12:35 Luncheon hosted by Euroconsult

14:10
Fireside chat

14:30
SAR: on the path to become mainstream?

14:30
Financing new space businesses

15:15
Leveraging data insights towards national security

15:15
Fireside Chat

15:30
Smallsat launchers: empowering smallsat diversity

16:00 Coffee Break hosted by Northrop Grumman

16:30
GSaaS' enhanced value proposition

16:30
Fireside Chat

17:30
Beyond Earth observation: Data fusion for nextgen service

16:45
Fireside Chat

18:45 Cocktail reception hosted by HawkEye 360

PROGRAM AT A GLANCE

Thursday, December 16

CONCORDE (STAGE 1)

08:30 Welcome Coffee hosted by RBC Signals

09:00
EO systems: new frontiers for leading manufacturers

10:05
Fireside Chat

10:20 Coffee Break hosted by KSAT

10:50
Finspace startup pitch

11:00
Tapping into new sensors: empowering detection and monitoring

11:45
The rise of GSaaS

12:15 Luncheon hosted by Aerospacelab

13:40
Fireside Chat

13:55
Data resellers: strategic partners in a globalized EO market

14:40
Parametric insurances: towards a customized insurance contract?

15:25 Coffee Break hosted by Satellogic

15:55
Leveraging new sensors for next-generation services in the maritime domain

16:40
EO4AG: powering the future of precision farming

17:30 Closing Remarks

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FINSPACE

The unique space tech competition bringing startups and future partners together

Six finalists have been selected for the 2021 Finspace edition from entries submitted from Europe, North and South America, Asia, and Oceania. Of the six finalists, two companies will be awarded. One will be awarded for the Satcom & Connectivity category and the other one for the Satellite Imagery & Analytics category.

Edgybees AI Software brings visual intelligence to geo-spatial imagery, accurately and in real-time to save lives and make critical decisions.

This Australian startup helps satellite operators and governments monitor their satellites and other objects in space. They image these objects at close range by renting unused time on existing Earth Observation satellites and applying their own software.

Phantom Space Corporation offers launch services, small satellite design and build, and space-based network services, and seeks to drastically reduce space access costs through mass production of small launchers and satellites.

Scottish-based, R3-IoT is on a mission to digitise the planet – providing value extending beyond connectivity. Its full-stack platform combining satellite, cellular, IoT, analytics and cybersecurity provides data-driven intelligence from anywhere in the world, 24/7 – regardless of available infrastructure.

ReOrbit is a Finnish startup whose vision is to enable a new generation of space applications by transforming traditional single-use satellites into reusable, autonomous, and networked systems that can be configured for different applications including in-orbit manufacturing and from-orbit servicing.

This Spanish company is leading the mobile to satellite IoT integration. Sateliot is building the first LEO constellation based on the standard 5G protocol, same used for cellular connectivity that allows commercial unmodified Nb-IoT devices to roam seamlessly between mobile networks and Sateliot's satellite constellation.

Finspace recognizes the most promising start-ups and forward-thinking innovators and disruptors across the entire satellite value chains. It enables entrepreneurs, decision makers and financiers from the entire global satellite industry to discuss, network, seek out future partnerships, and facilitate industrial deployment and international expansion.

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PROGRAM

Monday, December 13

CONCORDE (STAGE 1)

08:00 Welcome Coffee hosted by OneWeb

09:00 Opening remarks

09:15 World Satellite Business Week opening presentation

Strategic dynamics for the satellite business, Pacome Revillon, CEO, **Euroconsult**

09:30 Keynote

Josef Aschbacher, Director General, **European Space Agency**

09:50 Operator's strategic paths: C-view

Moderator: Nathan de Ruiter, Managing Director, **Euroconsult Canada**

- Sulaiman Al Ali, CEO, **Thuraya**
- Hasan Huseyin Ertok, CEO, **TurkSat**
- Kyung Min Song, CEO, **KT SAT**
- Miguel Ángel Panduro, CEO, **Hispasat**

10:35 Coffee Break CPI Communications & Power Industries

11:05 Finspace startup pitch – Sateliot

11:15 Government communications

Moderator: David Chegnion, Managing Director, **Satconsult**

- Carine Claeys, Special Envoy for Space, Head of the Space Task Force, **European External Action Service**
- LCL Ludovic Esquirie, Section Chief SATCOM – Future Preparation Division, **French MoD**
- Col. EA Jaime Sanchez Mayorga, **Spanish Ministry of Defence**

CONCORDE (STAGE 1)

11:45 Space business financing: the new rules

Moderator: Peter Nesgos, Partner, **Milbank**

- Dominique Cahu, MD Investm. Banking Div. & Co-Head EMEA Telecom & Media, **Morgan Stanley**
- Brian Holz, CEO, **Mangata Networks**
- Chris Kemp, CEO, **Astra**
- Michael Leitner, Formerly MD, Co-head of US Direct Lending and Special Situations, **BlackRock Capital Investment**
- James Murray, Partner, **PJT Partners**

12:45 Luncheon

Euroconsult

14:20 Global satellite businesses: new horizons

Moderator: Pacome Revillon, CEO, **Euroconsult**

- Michel Aziberg, Deputy CEO, **Eutelsat**
- Steve Collar, CEO, **SES**
- Mark Dankberg, CEO, **Viasat**
- Dan Goldberg, President & CEO, **Telesat**
- Pradman Kaul, CEO, **Hughes Network Systems**
- Steve Spengler, CEO, **Intelsat**

CONCORDE (STAGE 1)

15:35 Fireside Chat

Brent Prokosh, Senior Affiliate Consultant, **Euroconsult**
Ram Viswanathan, President & CEO, **Omnispace**

15:50 Coffee break

CURVALUX

16:20 Fireside Chat

Nathan de Ruiter, Managing Director Canada, **Euroconsult**
Stacy Kubicek, Vice President, General Manager, Mission Solutions, **Lockheed Martin Space**

16:35 Finspace startup pitch - R3 IoT

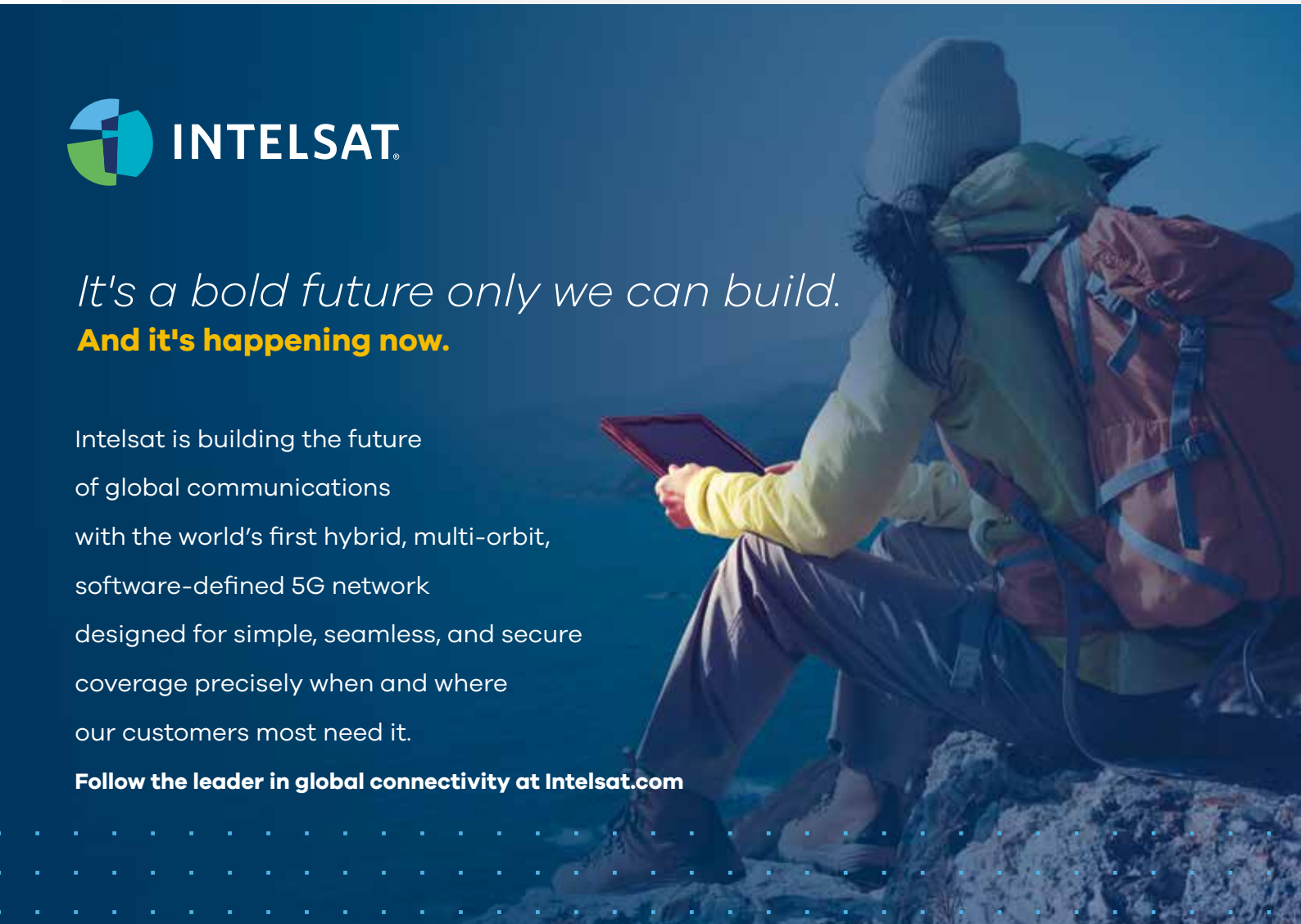
16:45 Launch service leaders: new launchers, new markets, new rules

Moderator: Peter de Selding, Editor, **SpaceIntelReport**

- Stephane Israel, CEO, **Arianespace**
- Tiphaine Louradour, President, **ILS**
- Clay Mowry, VP, Sales, Marketing & Customer Experience, **Blue Origin**
- Tom Ochinero, VP, Commercial Sales, **SpaceX**
- Mark Peller, VP – Major Development, **United Launch Alliance (ULA)**

18:00 Cocktail reception

ST Engineering



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PROGRAM
Monday, December 13

AIGLON (STAGE 2)

08:00 Welcome Coffee hosted by OneWeb

09:00 Opening remarks

09:15 World Satellite Business Week opening presentation

Strategic dynamics for the satellite business, Pacome Revillon, CEO, **Euroconsult**

09:30 Keynote

Josef Aschbacher, Director General, **European Space Agency**

09:50 The Smart Ship: connectivity and intelligence at sea

Moderator: Erwan Emilian, Board Chairman, **Mobile Satellite Users Association (MSUA)**

- Daniele Buonaiuto, Chief Information Officer, **MSC Cruises**
- Carole Plessy, Head of Maritime, **OneWeb**

10:35 Coffee break hosted by CPI Communications & Power Industries

11:05 Antennas: way forward for satellite networks

Moderator: Stephane Chenard, Senior Associated Consultant, **Euroconsult**

- Walter Berger, President & COO, **Kymeta**
- Nicolas Capet, Founder & CEO, **Anywaves**
- Kevin Walsh, COO, **Hanwha Phasor**
- Alvaro Sanchez, CEO, **Integrasys**
- Tim Shroyer, CTO, **CPI**

AIGLON (STAGE 2)

12:05 IFEC: The new dawn after the storm

Moderator: Vishal Patil, Consultant, **Euroconsult**

- Alia Al Qalam Al Yafie, IFEC Manager, **Oman Air**
- Norman Haughton, Manager IFEC Solutions, **Air Canada**
- Tal Kalderon, Head – IFEC, **El Al Israel Airlines**
- Will Ware, Team Lead, EFB Project, **Southwest Airlines**

12:45 Luncheon hosted by Euroconsult

14:20 Global satellite businesses: new horizons

Moderator: Pacome Revillon, CEO, **Euroconsult**

- Michel Aziberg, Deputy CEO, **Eutelsat**
- Steve Collar, CEO, **SES**
- Mark Dankberg, CEO, **Viasat**
- Dan Goldberg, President & CEO, **Telesat**
- Pradman Kaul, CEO, **Hughes Network Systems**
- Steve Spengler, CEO, **Intelsat**

15:35 Fireside Chat

Brent Prokosh, Senior Affiliate Consultant, **Euroconsult**
Ram Viswanathan, President & CEO, **Omnispace**

15:50 Coffee break hosted by CURVALUX

16:25 Future of IFC: Exploring new technologies, new applications, and new markets

Moderator: Susan Irwin, Managing Director, **Euroconsult US**

- Jon Cobin, CSO, **Intelsat**
- Gustavo Nader, CSO, **GoGo**
- Mike Pigott, Senior Vice President of Aviation Connectivity, **Anuvu**
- Jeff Sare, VP, Connectivity Solution, **Panasonic**

18:00 Cocktail reception hosted by ST Engineering

PROGRAM

Tuesday, December 14

CONCORDE (STAGE 1)

08:30 Welcome Coffee hosted by Microsoft Azure

09:00 5G, cloud apps: ready to seize the opportunity?

Moderator: Aarti Holla-Maini, Secretary General, **EMEA Satellite Operator's Association (ESOA)**

- Danny Damaghi, CEO, **LyteLoop**
- Renato Goodfellow, Head of Global Satellite, **BT**
- Elodie Viau, Director TIA, **European Space Agency (ESA)**

09:40 The growth agenda of leading connectivity service providers

Moderator: Blaine Curcio, Senior Affiliate Consultant, **Euroconsult**

- Alessandro Caranci, Senior Vice President Satellite Communication, **Telespazio**
- Pradip Jyoti Nath, Managing Director & CEO, **Nelco**
- Joe Spyteck, CEO, **Speedcast**

10:15 Coffee break hosted by ULA

10:45 Leading the satellite manufacturing race

Moderator: Steve Bochinger, COO, **Euroconsult**

- Herve Derrey, President & CEO, **Thales Alenia Space**
- Chris Johnson, Senior Vice President, Space, **Maxar Technologies**
- Steve Krein, VP, Civil and Commercial Satellites, **Northrop Grumman**
- Joe Landon, VP Advanced Programmes Development, **Lockheed Martin**
- Jean-Marc Nasr, EVP, Head of Space Systems, **Airbus Defence & Space**
- Ryan Reid, President, **Boeing Satellite Systems International**

CONCORDE (STAGE 1)

12:00 Fireside Chat

Pacome Revillon, CEO, **Euroconsult**
Rajeev Suri, Chief Executive Officer, **Inmarsat**

12:15 The day after tomorrow for smallsat manufacturing

Moderator: Alexandre Najjar, Senior Consultant, **Euroconsult**

- Niels Buus, CEO, **Gomspace**
- John Gedmark, CEO, **Astranis**
- Kevin Reyes, VP Business Development, **Airspace IX**
- Dirk Wallinger, CEO, **York Space Systems**

13:00 Luncheon hosted by Euroconsult

14:15 Virtualization, constellations, etc.: a revolution for the ground segment?

Moderator: Mark Holmes, Editorial Director, **Via Satellite**

- Phil Carrai, President, Space, Training & Cyper Division, **Kratos**
- Paul Gaske, EVP & GM, **Hughes Network Systems**
- David Gelerman, President & CEO, **SpaceBridge**
- Ron Levin, VP Mobility & Global Accounts, **Gilat**
- Vagan Shakhgildian, President, Commercial Group, **Comtech**
- Kevin Steen, CEO, **ST Engineering iDirect**

15:15 Finspace startup pitch – Phantom Space

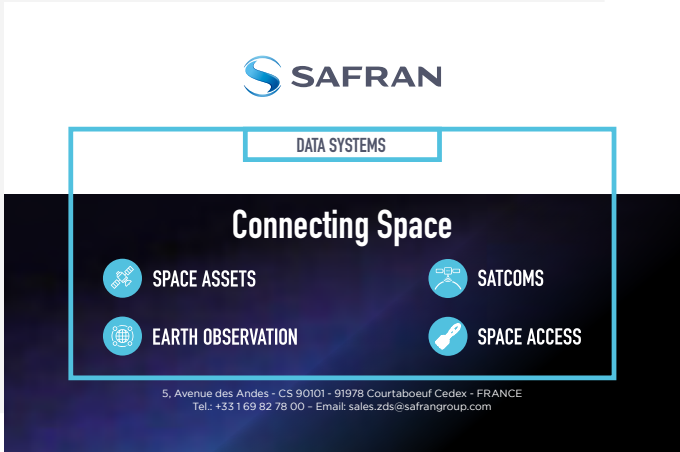
15:25 Financial analysts: valuing the new satellite proposition

Moderator: Brent Prokosh, Affilitate Senior Consultant, **Euroconsult**

- Sami Kassab, Analyst – Media, **Exane BNP Paribas**
- Mathieu Robilliard, Analyst, **Barclays**

15:55 Coffee break hosted by INTELSAT

16:25 Finspace startup pitch - ReOrbit



CONCORDE (STAGE 1)

16:35 Broadband constellations in the fast lane

Moderator: Nathan de Ruiter, Managing Director, **Euroconsult Canada**

- Clint Crosier, Director of Aerospace & Satellite Solutions, **AWS**
- Jonathan Hofeller, VP Starlink & commercial Sales, **SpaceX**
- Jean Hubert Lenotte, Chief Strategy& Resources Officer, **Eutelsat**
- Neil Masterson, CEO, **OneWeb**
- Ruy Pinto, CTO, **SES**
- Scott Wisniewski, EVP & Chief Strategy Officer, **AST Space Mobile**

17:50 Launchers of tomorrow

Moderators: Kevin O'Connell, Founder & CEO, **Space Economy Rising**

- Tim Ellis, CEO, **Relativity Space**
- Daniel Metzler, Co-Founder & CEO, **Isar Aerospace**
- Jorn Spurmann, CCO, **RFA Rocket Factory**

18:30 **Cocktail reception** hosted by

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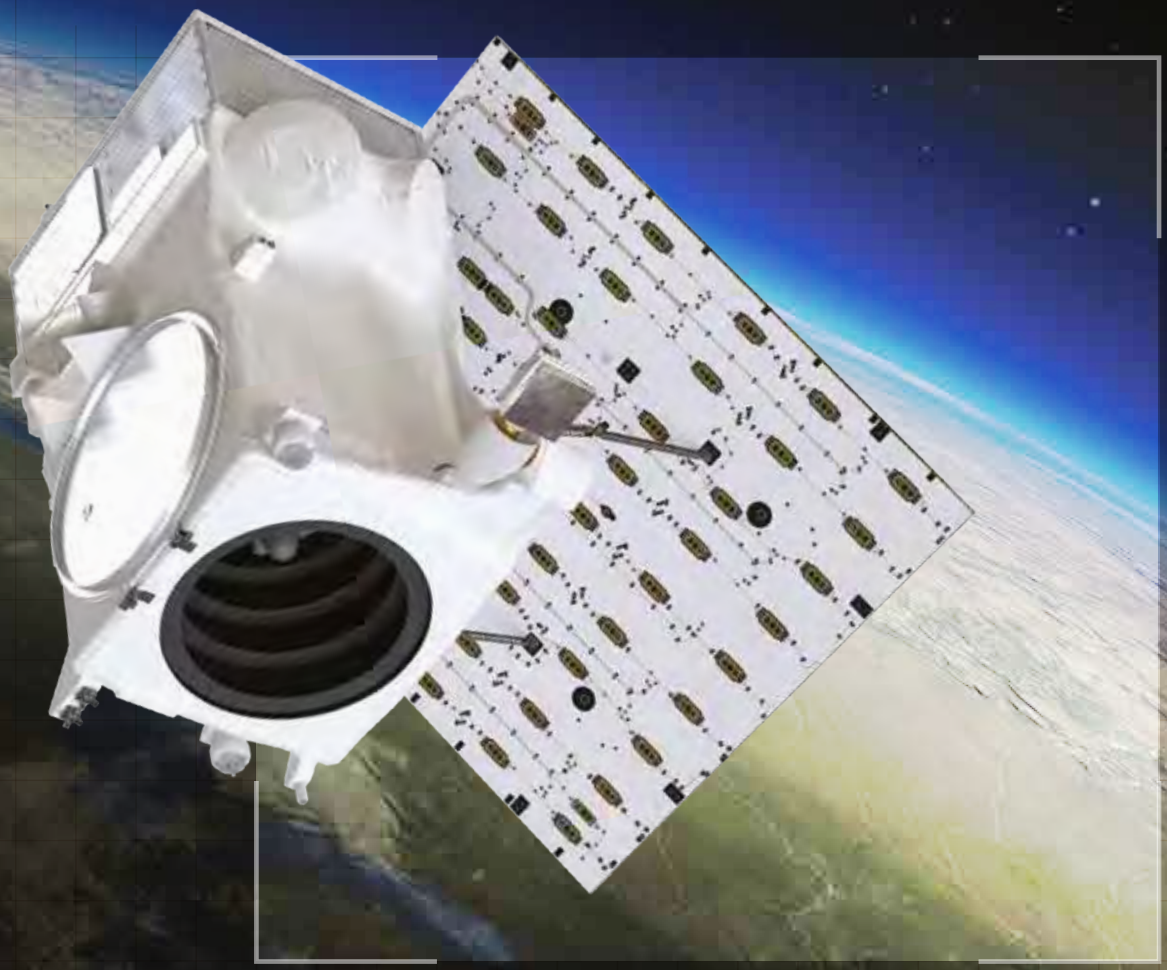

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PROGRAM
Tuesday, December 14

AIGLON (STAGE 2)

08:30 Welcome Coffee hosted by Microsoft Azure

09:00 5G, cloud apps: ready to seize the opportunity?

Moderator: Aarti Holla-Maini, Secretary General, **EMEA Satellite Operator's Association (ESOA)**

- Danny Damaghi, CEO, **LyteLoop**
- Renato Goodfellow, Head of Global Satellite, **BT**
- Elodie Viau, Director TIA, **European Space Agency (ESA)**

09:40 The growth agenda of leading connectivity service providers

Moderator: Blaine Curcio, Senior Affiliate Consultant, **Euroconsult**

- Alessandro Caranci, Senior Vice President Satellite Communication, **Telespazio**
- Pradip Jyoti Nath, Managing Director & CEO, **Nelco**
- Joe Spyteck, CEO, **Speedcast**

10:15 Coffee break hosted by ULA

10:45 Optical communications: open for business?

Moderator: Maxime Puteaux, Principal Advisor, **Euroconsult**

- Bulent Altan, CEO, **Mynaric**
- David Bettinger, CEO, **Spacelink**
- Mark Covelli, Senior Director Global Commercial Space Defense & Space, **Honeywell**
- Barry Matsumori, CEO, **BridgeComm**
- Marc Steckling, CEO & Chairman of the Board, **Tesat**

11:35 Connectivity & disaster monitoring for humanitarian organizations

Moderator: Erwan Emilian, Board Chairman, **Mobile Satellite Users Association (MSUA)**

- Elie Ayoub, Deputy Director a.i. Field ICT Support, **United Nations High Commissioner for Refugees (UNHCR)**
- Tim Grosser, CIO, **International Committee of the Red Cross (ICRC)**

AIGLON (STAGE 2)

11:55 Satellite Connectivity supporting developing economies

Moderator: Stephane Chenard, Senior Associated Consultant, **Euroconsult**

- Michel Dothey, Chief Commercial Operator, **SatADSL**
- Kahlid Ehaimer, General Manger, **Sudasat**
- Paulo Pusterla, Managing Director EMEA, **ABS**
- Kyle Whitehill, CEO, **Avanti Communications**

12:35 Teleports' enhanced value proposition

Moderator: José Sánchez Ruiz, Chairman, **World Teleport Association (WTA)**

- David Andres, VP Business Development & Marketing, **Santander Teleport**
- Ian Jones, CEO, **Goonhilly Teleport**
- Vladimir Rangelov, Senior Manager Broadcasting Services, **Vivacom**

13:00 **Luncheon** hosted by Euroconsult

AIGLON (STAGE 2)

14:20 The future of connectivity: LatAm

Moderator: David Meltzer, Secretary General, **GVF**

- Martin Fabris, VP Satellite Operations, **Arsat**
- Jesus Millon Millan, Head of Strategic Alliances Satellite Business Unit, **Telefonica**
- Lincoln Oliveira, General Director, **Star One**
- Jorge Romo, Director Telecommunications Network, **Telecomm**
- Mauricio Segovia, CEO, **Axess Networks**

15:10 Fireside Chat

Nathan de Ruiter, Managing Director, **Euroconsult Canada**
Matt Desch, CEO, **Iridium**

15:25 The future of connectivity: Asia-Pacific

Moderator: Blaine Curcio, Senior Affiliate Consultant, **Euroconsult**

- Pham Ahn Tuan, Director General, **Vietnam National Space Center (VNSC)**
- Yau Chyong Lim, COO, **Measat**
- Suwansiri Patompob, DCEO & CCO, **Thaicom**
- Christian Patouraux, CEO & Founder, **Kacific**

16:10 Coffee break hosted by INTELSAT

18:30 Cocktail reception hosted by COMTECH

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SES

PROGRAM

Wednesday, December 15

CONCORDE (STAGE 1)

08:00 Welcome Coffee hosted by SAFRAN

08:45 Opening presentation

The new dimensions of the Earth observation business, Pacome Revillon, CEO, **Euroconsult**

09:00 Leading operators' new horizons

Moderator: Pacome Revillon, CEO, **Euroconsult**

- John Cartwright, VP Product Management, **Maxar Technologies**
- Mike Greenley, CEO, **MDA**
- Francois Lombard, Director of Intelligence Business, **Airbus Defence and Space**
- Paolo Minciacchi, CEO, **e-GEOS**
- Brian O'Toole, CEO, **BlackSky**
- Noam Segal, CEO, **Imagesat**

10:15 Fireside Chat

Emmanuel Pajot, Secretary General, **European Association of Remote Sensing Companies (EARSC)**
Rodrigo Da Costa, Executive Director, **European Agency for the Space Programme (EUSPA)**

10:35 Coffee break hosted by iSi

11:00 Fireside Chat

Blaine Curcio, Senior Affiliate Consultant, **Euroconsult**
Robbie Schingler, Co-Founder & CSO, **Planet**

11:20 Utilities: Using satellites for maintenance and risk prevention

Moderator: Sanjay Kumar, Founder & CEO, **Geospatial World**

- Philip Briscoe, CEO, **Rezatec**
- Maurizia Brunetti, Water Supply Technical Coordination Manager, **Hera Group**
- Elly Perets, CEO, ASTERRA, **Technology by Utilis**

CONCORDE (STAGE 1)

11:50 New constellations capabilities & offerings

Moderator: Sylvain Drilholle, Senior Consultant, **Euroconsult**

- Awais Ahmed, CEO, **Pixxel**
- Benoit Deper, Founder & CEO, **Aerospacelab**
- Emiliano Kargieman, Founder & CEO, **Satellogic**
- Lily Xu, CEO, **SpaceWill**

12:35 Luncheon hosted by Euroconsult

14:10 Fireside chat

Pacome Revillon, CEO, **Euroconsult**

Tom Keane, Corporate Vice President, **Microsoft Azure**

14:30 SAR: on the path to become mainstream?

Moderator: Noel Rimalowski, Managing Director, **GH Partners**

- Payam Banazadeh, CEO & Founder, **Capella**
- Gabe Dominocielo, Co-Founder & CSO, **Umbra Lab**
- Rafal Modrzewski, CEO & Co-Founder, **ICEYE**
- Arai Motoyuki, Founder & CEO, **Synspective**

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CONCORDE (STAGE 1)

15:15 Leveraging data insights towards national security

Moderator: David Chegnion, Managing Director, **Satconsult**

- Brigadier General Michael Adamson, DG Space/Joint Force Space Component Commande, **Canada Department of National Defence**
- Geoffroy Beaudot, Head of Space and Cyber, Defense Directorate, Ministry of Foreign and European Affairs, **The Government of the Grand Dutchy of Luxembourg**
- Col. Guillaume Bourdeloux, Commander, **French Space Operations Brigade**
- Amb. Sorin Ducaru, Director, **European Union Satellite Centre (SatCen)**
- Jiri Sedivy, Chief Executive, **European Defense Agency (EDA)**

16:00 Coffee break hosted by NORTHROP GRUMMAN

16:30 GSaaS' enhanced value proposition

Moderator: Pacome Revillon, CEO, **Euroconsult**

- Stephen Kitay, Senior Director, Azure Space, **Microsoft**
- Miranda Pirrie, President, Satellite Management Services Division, **SSC**
- Christopher Richins, CEO, **RBC Signals**
- Rolf Skatteboe, CEO, **KSAT**
- John Williams, Vice President, RTE, **Viasat**

17:30 Beyond Earth observation: Data fusion for nextgen service

Moderator: Badia Belkouchi, Head of Digital & Data, **Euroconsult**

- Arnaud Guerin, Co-founder & CEO, **Preligens**
- Jaroslav Javornicky, CEO & Co-Founder, **Spaceknow**
- Giovanni Sylos Labini, CEO, **Planetek Italia**
- Adam Maher, CEO & Founder, **Ursa Space Systems**
- Ryan McKinney, Head of Data Strategy and Partnership, **Descartes Labs**
- Kevin O'Brien, CEO, **Orbital Insight**
- Antoine Rostand, CEO & Co-Founder, **Kayrros**

18:45 Cocktail reception hosted by HawkEye 360

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PROGRAM

Wednesday, December 15

AIGLON (STAGE 2)

08:00 Welcome Coffee hosted by SAFRAN

08:45 Opening presentation

The new dimensions of the Earth observation business, Pacome Revillon, CEO, **Euroconsult**

09:00 Fireside Chat

Laurent Valignon, Vice President, Marketing & Business Development, **Satconsult**
Tuan Haji Azlikamil Napiah, Director General, **Malaysian National Space Agency (ANGKASA)**

9:15 Strategic directions for smallsat manufacturing

Moderator: Rachel Villain, Principal Advisor, **Euroconsult**

- Luis Gomes, CEO, **AAC Clyde Space**
- Gregory Pradels, VP Development, Sales & Marketing, **Hemeria**
- Martin Sweeting, Executive Chairman, **SSTL**
- Marco Villa, Chief Revenue Officer, **Terran Orbital**

09:55 Finspace startup pitch - HEO Robotics

10:05 The rise of IoT

Moderator: Xavier Lansel, Senior Consultant, **Euroconsult**

- Alexandre Tisserant, CEO, **Kineis**
- Fabien Jordan, CEO, **AstroCast**
- Brian Pemberton, VP Sales & Marketing, **Omnispace**

10:35 Coffee break hosted by iSi

AIGLON (STAGE 2)

11:05 The "in"-space logistics business taking off

Moderator: Maxime Puteaux, Principal Advisor, **Euroconsult**

- Antoine de Chassy, Co-Founder & President, **Loft Orbital**
- David Henri, Co-Founder & Chief Product Officer, **Exotrail**
- Jeanne Medvedeva, VP Launch Services, **Exolaunch**
- John Rood, CEO, **Momentus**
- Luca Rossettini, CEO & Founder, **D-Orbit**
- Kumar Singarajah, Director - Government & Regulatory Affairs, UK & Europe, **Astroscale**

12:05 Space Surveillance & Tracking

Moderator: Simon Seminari, Principal Advisor, **Euroconsult**

- Stewart Bain, CEO & Co-Founder, **NorthStar Space Data**
- Jean-Marie Betermier, President, **Safran**

12:35 **Luncheon** hosted by Euroconsult

14:10 Fireside chat

Pacome Revillon, CEO, **Euroconsult**
Tom Keane, Corporate Vice President, **Microsoft Azure**

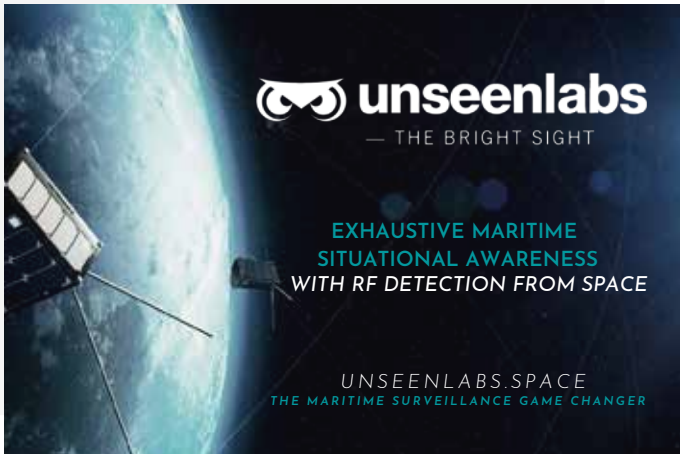
14:30 Financing new space businesses

Moderator: Dara Panahy, Partner, **Milbank**

- Mark Boggett, Managing Director, **Seraphim**
- Mike Collett, Managing Partner, **Promus Ventures**
- Jonathan Fentzke, Managing Partner, **Techstars Starburst Space Accelerator**
- Michaël Thomas, VC Investor, **Karista**

15:15 Fireside chat

Simon Seminari, Principal Advisor, **Euroconsult**
Ian Annette, Deputy Chief Executive for Programme Delivery, **UK Space Agency**



AIGLON (STAGE 2)

15:30 Smallsat launchers: empowering smallsat diversity

Moderator: Maxime Puteaux, Principal Advisor, **Euroconsult**

- Dan Hart, President & CEO, **Virgin Orbit**
- Lars Hoffman, SVP, Global Launch Services, **Rocket Lab**
- Dmitry Loskutov, Director General, **Glavkosmos**
- Giulio Ranzo, CEO, **Avio**

16:00 Coffee break hosted by NORTHROP GRUMMAN

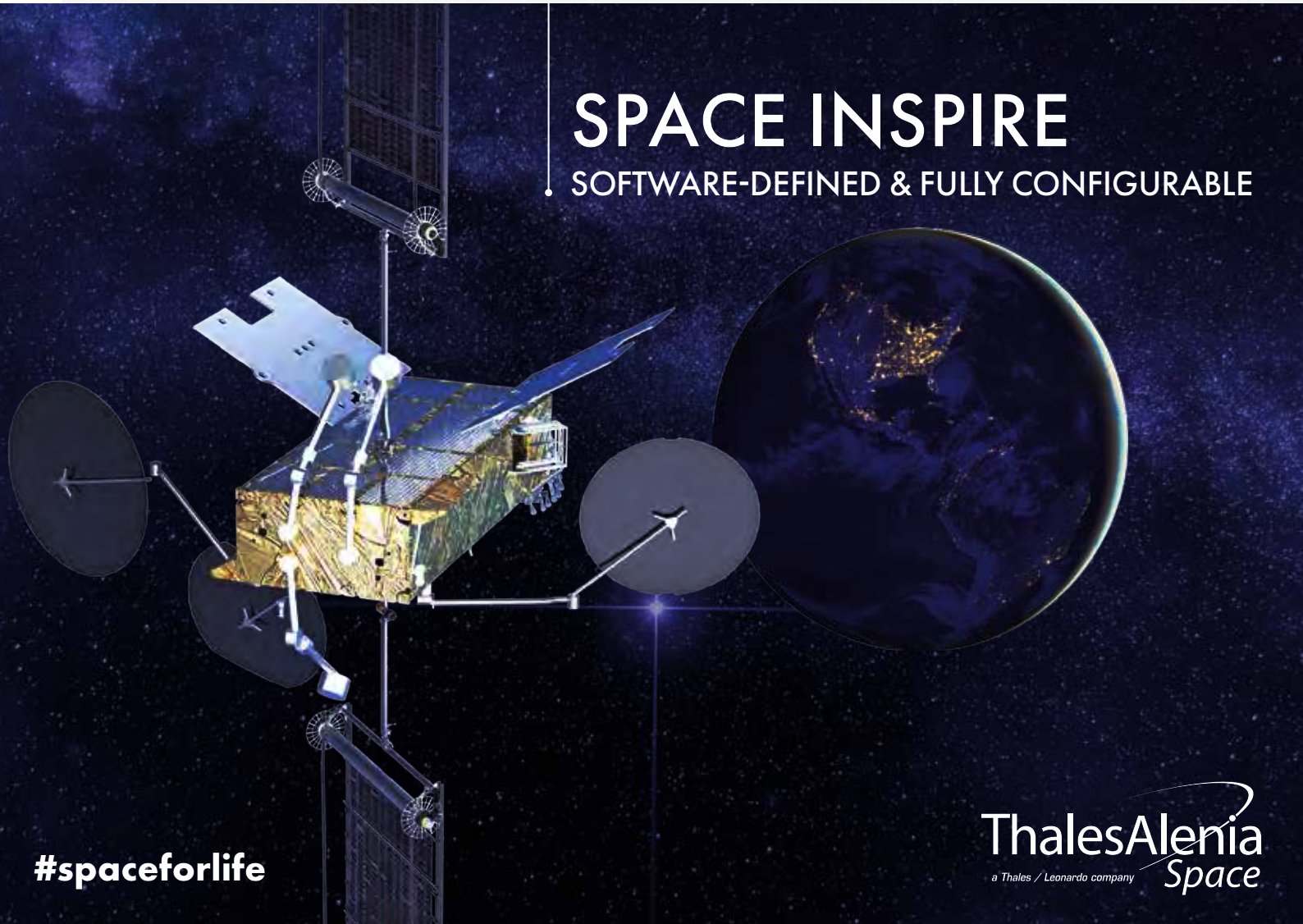
16:30 Fireside Chat

Laurent Valignon, Vice President, Marketing & Business Development, **Satconsult**
Pilar Zamora Acevedo, Executive Director, **Agencia Espacial de Colombia**

16:45 Fireside Chat

Simon Seminari, Principal Advisor, **Euroconsult**
Aude Vignelles, CTO, **Australian Space Agency**

18:45 Cocktail reception hosted by HawkEye360



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PROGRAM

Thursday, December 16

CONCORDE (STAGE 1)

08:30 Welcome Coffee hosted by RBC SIGNALS

9:00 EO systems: new frontiers for leading manufacturers

Moderator: Rachel Villain, Principal Advisor, **Euroconsult**

- Massimo Comparini, Deputy CEO, SEVP Observation, Navig. & Explo., **Thales Alenia Space**
- Ee-Eul Kim, CEO, **Satrec Initiative**
- Christopher Lentz, Chief Architect for Commercial Remote Sensing, **Lockheed Martin**
- Philippe Pham, Head of Earth Observation, Navigation and Science, **Airbus Defence & Space**

10:05 Fireside Chat

Steve Bochinger, COO, **Euroconsult**
Mohamed El-Koosy CEO, **Egyptian Space Agency (EgSA)**

10:20 Coffee break hosted by KSAT KONGSBERG SATELLITE SERVICES

10:50 Finspace startup pitch - Edgybees

11:00 Tapping into new sensors: empowering detection and monitoring

Moderator: Stephane Chenard, Senior Associated Consultant, **Euroconsult**

- Anthony Baker, CEO, **SatelliteVu**
- Stephane Germain, CEO, **GHGSat**
- Juan Tomas Hernani, CEO, **Satlantis**
- Tania Meixus, Director International Relations, **Enagas**

11:45 The rise of GSaaS

Moderator: Badia Belkouchi, Head of Digital & Data, **Euroconsult**

- Bill Carlin, Sr. Manager, BD & Sales, **AWS**
- Giovanni Pandolfi, Co-Founder & CTO, **Leaf Space**
- Tom Pirrone, Chief Strategy Officer, **Infostellar**

12:15 Luncheon hosted by aerospacelab

UP42
The Geospatial Marketplace and Developer Platform

CONCORDE (STAGE 1)

13:40 Fireside Chat

Susan Irwin, Managing Director, **Euroconsult US**

Tahara Dawkins, Director, Commercial Remote Sensing Regulatory Affairs Office, **US Department of Commerce**

13:55 Data resellers: strategic partners in a globalized EO market

Moderator: Alexis Conte, Senior Consultant, **Euroconsult**

- Kammy Brun, Managing Director, HEAD Aerospace France, **HEAD Aerospace**
- Rob Coorey, Managing Director, **Geospatial Intelligence Pty**
- Pascal Schichor, Sales Director, **EU Space Imaging**
- Sean Wiid, CEO, **UP42**

14:40 Parametric insurances: towards a customized insurance contract?

Moderator: Denis Bensoussan, Head of Space Risk, **Beazley**

- David Mäder-Soyka, Director and Global Head of Sales & Delivery Property Solutions, **Swiss Reinsurance**
- John Isaac Clark, CEO, **Arturo**
- Amaury Dufetel, Head of Parametric Insurance for Asia & Americas, **AXA Climate**
- Ignasi Lluch, CTO, **Near Space Lab**

CONCORDE (STAGE 1)

15:25 **Coffee break** hosted by SATELLOGIC

16:55 Leveraging new sensors for next-generation services in the maritime domain

Moderator: Sylvain Drilholle, Senior Consultant, **Euroconsult**

- Leender Bal, Head of Safety, Security and Surveillance, **European Maritime Safety Agency (EMSA)**
- Pedro Faria, COO, **Spacety Luxembourg**
- Clement Galic, Co-Founder & CEO, **UnseenLabs**
- John Serafini, CEO, **HawkEye 360**

16:40 EO4AG: powering the future of precision farming

Moderator: Clint Grauman, CEO, **Terrametric**

- Rim Elijah, Director of Strategic Partnerships, **EOS Data & Analytics**
- Max Gulde, Co-Founder & CEO, **ConstellR**
- Chris Seifert, Head of Data Science, **Granular**

17:30 Closing remarks

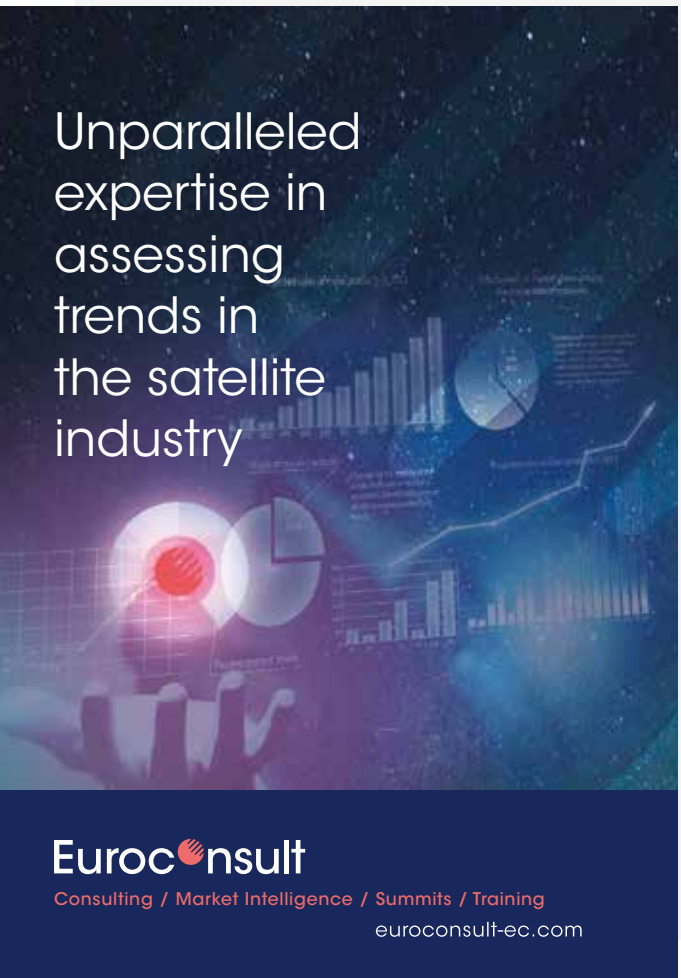
BLUE ORIGIN

BlueOrigin.com/New-Glenn

SATELLITE CONNECTIVITY AT AN INFLECTION POINT

New generations of GEO-HTS satellites and new NGSO constellations will be key to making satellite services more competitive over the coming decade.

Satellite-based connectivity is continuing its deep transformation. Leased capacity has reached close to 2 Tbps despite the impact of the pandemic, for infrastructure revenues of $10.3 billion.
Several leading players have restructured and/or made acquisitions to optimize their operations. The recently announced merger between Viasat and Inmarsat is emblematic of changes in the ecosystem, as are the strategic partnerships involving Amazon, Microsoft, Google, and several satellite companies. NGSO constellations have continued to gain ground, with SpaceX and OneWeb having launched more than 1,800 and 350 satellites, respectively, with several other constellations having reached new milestones. The digitization of infrastructure and operations is accelerating, with a large proportion of the new GEO satellites being procured having software-defined payloads, and the virtualization of the ground segment also on the industry's agenda.
Technology disruption, changes in business models and still large video-distribution services will be at the heart of the $135 billion service revenue that we anticipate for the industry by the end of the current decade.



CAPACITY LEASED, *in Tbps*

Source: Satellite Connectivity and Video Market, 2021 edition, Euroconsult

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Airbus pioneers sustainable aerospace for a safe and united world. Airbus always has been at the forefront of innovating new technologies, with a pioneering spirit that has redefined the aerospace industry. Our products bring people closer together, helping them unite and progress. We strive to continually push the boundaries on what is possible to safeguard our world for future generations.

Arianespace provides launch services for all types of satellites into all orbits. It has orbited more than 600 satellites since 1980, using its family of launchers, Ariane, Soyuz and Vega, from launch sites in French Guiana and Baikonur. Arianespace is preparing for the future with the next-generation of launchers - Ariane 6 and Vega C. Arianespace is headquartered in Evry, and has a technical facility at the Guiana Space Center, plus offices in Washington, D.C., Tokyo and Singapore. Arianespace is a subsidiary of ArianeGroup, (holding 74% of capital), with the balance held by 15 other shareholders from European launcher industry.

Space and Launch's global satellite businesses, headquartered in El Segundo, Calif., together make up Boeing's center for all space-borne intelligence systems and government and commercial satellite systems. Boeing offers end-to-end intelligence services and has competency in large-scale systems integration; intelligence, surveillance and reconnaissance systems; and navigation and communication systems. The world's first geosynchronous communications satellite, Syncom II, was built by Boeing and launched in 1963. Since Syncom, the company has delivered more than 300 satellites to more than 50 customers in over 20 countries. All were designed and built in Boeing's satellite manufacturing factory, the world's largest such facility.

Maxar is a trusted partner and innovator in Earth Intelligence and Space Infrastructure. We deliver disruptive value to government and commercial customers to help them monitor, understand and navigate our changing planet; deliver global broadband communications; and explore and advance the use of space. Our unique approach combines decades of deep mission understanding and a proven commercial and defense foundation to deploy solutions and deliver insights with speed, scale, and cost effectiveness. Maxar's 4,400 team members in more than 20 global locations are inspired to harness the potential of space to help our customers create a better world.

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Microsoft enables digital transformation for the era of intelligent cloud and intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.
Azure Space brings together renowned space industry veterans, scientists and world-class product engineers to build cloud capabilities that meet the unique needs of the space community. By partnering with leaders in the space community, we are extending the utility of our Azure capabilities with worldwide satellite connectivity, unblocking cloud computing in more scenarios, and empowering our partners and customers to achieve more.

MILBANK LLP stands alone among global law firms in its commitment to the space and satellite sectors. The Milbank Space Business Group is actively involved, every day, in the commercial space marketplace. Our clients – satellite companies, aerospace manufacturers, financial institutions, teleport operators, users of satellite capacity, and investors in space businesses – benefit from that experience.
The Milbank Space Business Group is multidisciplinary, concentrating in:

- Commercial space industry contracts
- Satellite finance
- Space insurance and risk management
- Regulation of space-related activities, the use of outer space and associated national security matters

SES has a bold vision to deliver amazing experiences everywhere on earth by distributing the highest quality video content and providing seamless connectivity around the world. As the leader in global content connectivity solutions, SES operates the world's only multi-orbit constellation. By leveraging a vast and intelligent, cloud-enabled network, SES is able to deliver high-quality connectivity solutions anywhere on land, at sea or in the air. SES's video network carries over 8,500 channels and has an unparalleled reach of 361 million households, delivering managed media services for both linear and non-linear content.

EARTH OBSERVATION TO GET A BOOST FROM NEW SYSTEMS AND SOLUTIONS

The promises of new-generation sensors and constellations are now taking shape, with more than 200 satellites launched by 54 companies in 2021.

Revenue from the EO data and service industry has reached $4.1 billion. Demand from the defense and intelligence community continues to support growth and to lead in terms of revenues. Increasing demand also exists in the civil and commercial sector, which largely remains at the development stage but will drive growth as new services develop.

Adaptations in regulation and in procurement frameworks should contribute to industry growth, driven by the procurement of diverse types of data and solutions. This comes together with intense activity to build richer services with more automation. The more than 700 satellites that should be commercializing data by 2023, including GNSS-RO/R, GhG, RF, optical and SAR missions, and the expanding ground segment and online platforms should support their development.

Several mergers between SPACs and information businesses were announced and/or completed in 2021, including by Planet, Blacksky, Spire Global and Satellogic. Other companies such as Hawkeye 360, GhGsat and SatelliteVu have also completed new financing rounds.

The take-up of several vertical segments should build the around $6 billion revenue that we anticipate by 2025.

COMMERCIAL EO SATELLITES IN OPERATION BY 2023*. *All satellite masses – excluding non-dual use military satellites*

OPTICAL	400+
SAR	80+
GNSS-RO	80+
GhG	10+
RF/ELINT	70+

*Includes satellites from private enterprises and governments whose data are made available on a commercial basis. Excludes noncommercial satellites. Satellites in operation are based on reported/expected life spans.

Source: Euroconsult Market Intelligence

PLATINUM SPONSORS

BLACKSKY
Be The First To Know

BlackSky (NYSE: BKSY) is a leading provider of real-time geospatial intelligence. The company monitors activities and facilities worldwide harnessing the world's emerging sensor networks and leveraging its own satellite constellation. BlackSky's monitoring service, Spectra AI, is powered by cutting-edge compute techniques including machine learning, artificial intelligence, computer vision, and natural language processing.

EUTELSAT

Founded in 1977, Eutelsat Communications is one of the world's leading satellite operators. With a global fleet of satellites and associated ground infrastructure, Eutelsat enables clients across Video, Data, Government, Fixed and Mobile Broadband markets to communicate effectively to their customers, irrespective of their location. Over 6 800 television channels operated by leading media groups are broadcast by Eutelsat to one billion viewers equipped for DTH reception or connected to terrestrial networks. Headquartered in Paris, with offices and teleports around the globe, Eutelsat assembles 1,200 men and women from 50 countries who are dedicated to delivering the highest quality of service. Eutelsat Communications is listed on the Euronext Paris Stock Exchange (ticker: ETL).

INTELSAT

As the foundational architects of satellite technology, Intelsat operates the world's most trusted satellite telecom network. We apply our unparalleled expertise and global scale to connect people, businesses, governments and communities, no matter how difficult the challenge. Intelsat is building the future of global communications with the world's first hybrid, multi-orbit, software-defined 5G network designed for simple, seamless, and secure coverage precisely when and where our customers most need it. Follow the leader in global connectivity and "Imagine Here," with us, at www.intelsat.com.

PLATINUM SPONSORS

Kymeta is unlocking the potential of satellite connectivity, combined with cellular networks, to satisfy the overwhelming demand for global ubiquitous mobile connectivity. The company's flat-panel satellite antenna, the first of its kind, and Kymeta™ Connect connectivity services provide revolutionary mobile connectivity on satellite and hybrid satellite-cellular networks to customers around the world. Backed by U.S. and international patents and licenses, the Kymeta terminal addresses the need for lightweight, slim, and high-throughput communication systems that do not require mechanical components to steer toward a satellite. Kymeta makes connecting easy – for any vehicle, vessel, or fixed platform.

Lockheed Martin Space develops space-based solutions for connecting people and advancing the cause of civilization. From exploring planets and asteroids to partnering with commercial and government customers on satellite manufacturing, we are driving towards the nexus of satellite affordability, capability and resiliency. Lockheed Martin Space offers a full range of communications, remote sensing, navigation and meteorological satellites to connect, protect, and explore the world in which we live.

Based on a 40-year experience, Thales Alenia Space delivers cost-effective solutions for telecommunications, navigation, Earth observation, exploration, science and orbital infrastructures. Governments and private industry rely on us to design satellite-based systems that provide connections and positioning, monitor our planet, enhance management of its resources, explore our Solar System and beyond. Thales Alenia Space sees space as a new horizon, helping to build a better, more sustainable life on Earth. A joint-venture between Thales (67%) and Leonardo (33%), Thales Alenia Space teams up with Telespazio to form the Space Alliance, which offers a complete range of solutions including services.

United Launch Alliance's 140+ consecutive successful launches demonstrate that we understand that mission success is business success. We are your ride to space and most importantly your business partner, committed to building a launch strategy that maximizes your profit and positions you above your competition. Our highly reliable and capable rockets provide the confidence you need to meet and exceed your business goals. Our experience launching all major satellite platforms to all orbits and the launch industry's most responsive service customization means confidence for your mission. When it absolutely, positively has to get to space safely and on time, ULA delivers.

Viasat is a global communications company that believes everyone and everything in the world can be connected. For more than 30 years, Viasat has helped shape how consumers, businesses, governments and militaries around the world communicate. Today, the Company is developing the ultimate global communications network to power high-quality, secure, affordable, fast connections to impact people's lives anywhere they are—on the ground, in the air or at sea.

THE SMALLSAT REVOLUTION ENTERING A NEW PHASE

While highly dynamic, the small satellite market remains split between the building of megaconstellations and the more fragmented demand for other government and private projects.

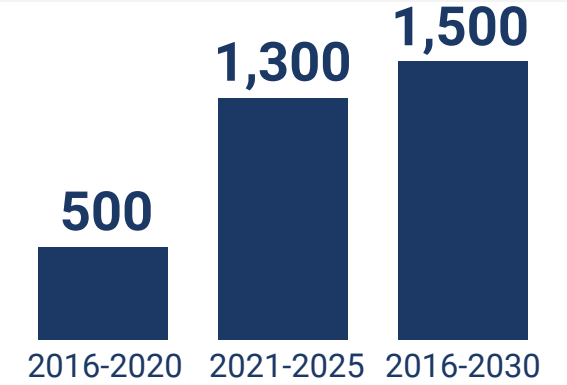
The latest edition of our market intelligence dedicated to satellites below 500 kg contemplates a launch of close to 14,000 small satellites in the next 10 years, with the bulk of these being parts of constellations. This estimate results from a critical review of the various announced programs and future replenishment requirements, while also provisioning for a number of new projects.

Our forecasts may be challenged by the new filings submitted in 2021 for satellite constellations. Since September 2021, several organizations have requested the right to operate new constellations, with fleet sizes ranging from around 200 to 300,000 satellites of widely varying sizes and weight.

While January 2021 saw a record launch of 143 small satellites by SpaceX, this year also saw a larger number of fundraising events by industry players such as SpaceX, Relativity, ABL Space Systems, Isar Aerospace, Firefly, Gilmour Space, Omnispace, Varda Space, Accion and Phase Four as well as M&A transactions.

The multiplication of missions for public and private stakeholders should come together with increasing activity volume related to space sustainability and traffic management.

AVERAGE NUMBER OF SMALLSAT, *per period*



Source: Prospects for the Small Satellite Market, 2021 edition, Euroconsult

GOLD SPONSORS

Amazon Web Services (AWS) helps commercial and government customers build satellites, conduct space and launch operations, and reimagine space exploration. Our reliable global infrastructure and unmatched portfolio of cloud services position AWS to equip organizations in the private and public sector to process and transform space collections into data, make that data actionable and accessible to customers around the globe, and redefine how organizations transform the space market segment. With AWS, customers are accelerating missions, removing barriers to innovation, and inspiring future generations.

Avanti Communications is the leading KA-band high throughput satellite capacity partner to the communications industry across EMEA focused on driving connectivity across Africa.
Through the HYLAS satellite fleet and its secure ground network, Avanti provides dedicated fixed and flexible-beam satellite connectivity, extending and guaranteeing coverage for carriers, defence missions and critical public services.
www.avantiplc.com

Comtech is a leading provider of innovative products, systems and services for advanced communications solutions. With more than 50 years of proud history in technology innovation and product quality, our cutting edge satellite communications solutions are deployed globally to support governments and commercial users on mission critical applications. The high-performance and flexibility of our satellite networking and network optimization systems, meet the unique demands of service providers, satellite operators, mobile backhaul, mobility and enterprise customers.

Hughes Network Systems, an innovator in satellite and multi-transport technologies and networks for 50 years, provides broadband equipment and services; managed services featuring smart, software-defined networking; and end-to-end network operation for millions of consumers, businesses, governments and communities worldwide. HughesNet®, connects more than 1.5 million subscribers across the Americas, and the Hughes JUPITER™ System powers Internet access worldwide. Hughes supplies more than half the global satellite terminal market to leading satellite operators, in-flight service providers, mobile network operators and military customers. A managed network services provider, Hughes supports nearly 500,000 enterprise sites with its HughesON™ portfolio of wired and wireless solutions. (NASDAQ: SATS).

GOLD SPONSORS

ISI is a leading global provider of Space-Based geospatial-intelligence products and services. The company operates its VVHR EROS NG™ earth observation satellite constellation, Serving the world's most demanding defense & intelligence agencies as well as the growing demand of the commercial sector. ISI developed a family of highly capable new-space platforms such as the KNIGHT™ and the RUNNER™, optimally designed to comprise high-resolution high-revisit satellite constellations with cutting-edge image quality. ISI provides turnkey programs and services, combining superb satellite imagery with advanced AI-powered analytical solutions. ISI is a one-stop-shop for tasking, collecting, analyzing and disseminating space-based intelligence, creating a new value proposition to its customers.

Inmarsat is the world leader in global, mobile satellite communications. It owns and operates the world's most diverse global portfolio of mobile telecommunications satellite networks, and holds a multi-layered, global spectrum portfolio, enabling unparalleled breadth and diversity in the solutions it provides. The company has an unrivalled track record of operating the world's most reliable global mobile satellite telecommunications networks, sustaining business and mission critical safety & operational applications for more than 40 years. Inmarsat operates across a diversified portfolio of sectors with the financial resources to fund its business strategy, holding leading positions in the Maritime, Government, Aviation and Enterprise satcoms markets.

Get Ready for What's Next in the satellite industry. Kratos ensures customers are prepared by providing end-to-end ground segment solutions from antennas, TT&C, signal processing, interference mitigation, network management, security and much more. Kratos is also at the forefront of enabling the movement of ground systems to virtualized and software-defined systems that support a variety of paths, goals and business models with its OpenSpace product family. For more than 30 years, Kratos has been developing the products and systems used across ground operations by more than 75% of the world's commercial satellite operators and in some 85% of U.S. space missions.

GOLD SPONSORS

Northrop Grumman solves the toughest problems in space, aeronautics, defense and cyberspace to meet the ever evolving needs of our customers worldwide. Our 85,000 employees define possible every day using science, technology and engineering to create and deliver advanced systems, products and services.

Headquartered in the Washington, D.C. area, and founded by veteran telecommunications and satellite industry executives, Omnispace is redefining mobile connectivity for the 21st century. By leveraging 5G technologies, the company is combining the global footprint of a non geostationary satellite constellation with the mobile networks of the world's leading telecom companies to bring an interoperable "one network" connectivity to users and IoT devices anywhere on the globe.

OneWeb's mission is to enable internet access for everyone, everywhere. OneWeb is building a communications network with a constellation of Low Earth Orbit satellites that will provide connectivity to people around the world, consisting of an initial constellation of 650 satellites that will be 1,200 km from Earth, growing to 1,980 satellites in phase two of the network's growth. With a successful launch of its first satellites in February 2019 and recent high-speed video streaming during its system tests, OneWeb is on track to begin monthly launches starting in December 2019 as it prepares for partial service in 2020 and global commercial service in 2021.

Surrey Satellite Technology Ltd is at the forefront of space innovation; disrupting the conventions of small satellite design and exploiting new technologies, to bring affordable space missions to our global customers. We draw on our years of expertise and take a pragmatic approach to bring customers the very best solutions for their business case. That's what makes us a world-leader in the space sector.

Telespazio, a Leonardo and Thales 67/33 joint venture, is one of the world's leading operators in satellite services. Its activities range from the design and development of space systems to the management of launch services, from in-orbit satellite control to Earth observation, from integrated communications, satellite navigation and localisation services to scientific programmes. Telespazio plays a leading role in the reference markets harnessing technological experience acquired over the years. Since its establishment, the company has participated in major European space programmes such as Galileo, EGNOS, Copernicus and COSMO-SkyMed. In 2020, Telespazio generated sales of EUR 540 million while employing 3,000 people in nine countries.

THE ECONOMY OF OUTER SPACE LOGISTICS TAKING SHAPE

The combination of fundraising for new in-space businesses together with service contracts being signed and support from public agencies is fostering the emergence of a new ecosystem.

The diversifying of space activities, from orbital satellite operations to human spaceflight and space exploration, requires an extending range of capabilities.
Several companies are taking positions in the space logistic ecosystem, from orbital transfer to data relay communications with additional capabilities, as compared to regular in-orbit architecture.
The first generation of logistics assets are adding flexibility with last-mile services, technology maturity with debris removal demonstrations and resiliency with life-extension capabilities. In the long run, a comprehensive space logistics ecosystem will materialize, adding maintenance, refueling, orbital conveyance and in-space assembly capabilities for satellite manufacturers and operators, hence transforming the ways assets are transported and operated in orbit.
Space domain awareness and traffic management are also a growing business, with stakeholders looking for a better understanding of the space environment and looking to operate assets in safer conditions.

KEY MILESTONES OF SPACE LOGISTICS

2020

First in-orbit rendez vous in GEO in 2020 (Northrop Grumman)

2021

Largest launch rideshare: 143 satellites (SpaceX)

2021

First active debris removal demonstration (Astroscale)

2024

first in orbit manufacturing demo (NASA / MadeInSpace)

SILVER SPONSORS

Aerospacelab captures and automatically processes satellite images blending non-geospatial data. Defence, strategic & business intelligence, insurance, infrastructure and commodities sectors are at our core. You can count on information that is:
- Proactive and Predictive
- High-resolution and multi-source
- Real-time and quickly available
- Easy to reach with large user's autonomy.

Aiming to become a premier player in economic and strategic intelligence we transform data into actionable insights. See where the future matters.

Avio is a leading international group engaged in the construction and development of space launchers and solid and liquid propulsion systems for space travel. The experience and know-how built up over more than 50 years puts Avio at the cutting-edge of the space launcher sector, solid, liquid and cryogenic propulsion and tactical propulsion. Avio operates in Italy, France and French Guyana with 5 facilities, employing approx. 1,000 highly-qualified personnel, of which approx. 30% involved in research and development. Avio is a prime contractor for the Vega programme and a sub-contractor for the Ariane programme, both financed by the European Space Agency ("ESA"), placing Italy among the limited number of countries capable of producing a complete spacecraft.

Blue Origin's vision is millions of people living and working in space, which can be achieved by lowering the cost of access. Our step-by-step approach begins with New Shepard, a fully reusable suborbital launch vehicle currently flying above the Kármán line. Learnings from New Shepard are being applied to New Glenn, which will take people and payloads to Earth orbit and beyond starting in 2021. Blue's roadmap also includes Blue Moon, a lander capable of delivering cargo and humans to the lunar surface by 2024. These vehicles are powered by a family of liquid hydrogen and liquefied natural gas-fueled engines.

With a heritage of technological excellence that spans decades, CPI develops, manufactures, and globally distributes innovative and reliable solutions used in the generation, amplification, transmission, and reception of microwave signals for commercial and military applications. CPI has the broadest ground station equipment and antenna system portfolio in the satellite industry: fixed and transportable antennas, multiband antenna feeds, high-power amplifiers, downlink electronics, and precision antenna control systems. CPI's leading edge technologies include design, integration, installation, and commissioning of full turn-key high performance VHTS Q/V-band earth stations; high performance amplifiers from S-band to W-band; and the most reliable earth observation terminals in the world.

SILVER SPONSORS

Curvalux designs, manufactures and implements Wireless Broadband technology. Thanks to its innovative multi-beam antenna systems Curvalux delivers higher cell capacity, lower power consumption, and higher throughputs. CurvaNet is the technology that Curvalux designed to connect beyond the reach of cell towers. This affordable solution enables Wi-Fi hotspots to be created using a proprietary satellite terminal (or CPE) that is portable and sustainable, only a small solar panel is required to power it. Working in sync with a smart Low Earth Orbit ("LEO") satellite constellation, CurvaNet is the world's first low cost, self-installed satellite antenna system that will bring affordable broadband internet access to remote regions around the world lacking in infrastructure. curvalux.com

DFH Satellite Co., Ltd., known as China's National Engineering Research Center of Small Satellites and Applications, is a professional aerospace company of CAST. DFH provides solutions of high performance satellite for earth observation, space communication, space science experiment and new technology demonstration. The company enjoys a fairly strong developing and manufacturing capacity of 20-30 satellites at 500-1000kg in mass each year. DFH also offers industry-leading mission consultation and know-how transfer services. Working together with global partners with 20 years legacy, DFH has successfully launched 131 satellites up to now, solving remote sensing challenges and committing to the promotion of SDGs 2030 and construction of human community with shared future.

Your Space Observation Partner. 9 Cameras orbiting in space with 2 to join shortly. Elbit Systems Elctro-Optics (ElOp) is a global leader and national knowledge center for space observation solutions with prestigious record and proven expertise in developing space imaging systems for more than 25 years, playing a vital role in major governmental, commercial and scientific missions. ElOp holds critical key technologies in-house with full integration capabilities. PLUTO - Our Next Generation camera. A versatile, multi-purpose family of high-performance, small form factor earth observation payloads designed for new space applications with configurable sensors to meet customers' needs. We would be happy to cooperate with Government, companies, agencies & Service providers to tailor the best solution for your needs.

Based in Munich, Germany and established in 2002, European Space Imaging is the leading premium supplier of global Very High Resolution (VHR) satellite imagery and derived services such as 3D products, vector derivatives and analytic tools to customers in Europe and North Africa.
Through their longstanding partnership with Maxar Technologies, they were the first European company to bring 30 cm resolution satellite imagery to the EU market and have an extensive image archive spanning almost two decades. Today, European Space Imaging has access to satellites at resolutions 30 cm – 1 m and a combined daily revisit of close to 10 times a day in panchromatic, multispectral, hyperspectral and video.

Exolaunch provides launch, in-space logistics and deployment services for NewSpace. Its flight heritage includes the successful deployment of 140 small satellites into orbit (with 60+ satellites scheduled for flight in 2021) through its global network of launch vehicle providers. Exolaunch executes launch contracts for NewSpace leaders, the world's most innovative startups, research institutions, government organizations, and space agencies. The company manufactures flight-proven separation systems to deliver the best-in-class integration and deployment services for small satellites, and develops a line of space tugs to provide last-mile delivery services and remove space debris.

SILVER SPONSORS

GHGSat's novel technology will enable GHG and AQG measurement with better accuracy at a fraction of the cost of comparable alternatives. Owners of industrial facilities will be able to monitor all their facilities, local or remote, anywhere in the world, with common technology, in near-real-time. Significantly improved emissions information will enable industries to better measure, control, and ultimately reduce emissions of GHGs and AQGs. Better data means better control, and ultimately reduction of GHG emissions.

Gilat Satellite Networks is a leading global provider of satellite-based broadband communications. With 30 years of experience, we design and manufacture cutting-edge ground segment equipment, and provide comprehensive solutions and end-to-end services, powered by our innovative technology. Delivering high value competitive solutions, our portfolio comprises of a cloud based VSAT network platform, high-speed modems, high performance on-the-move antennas and high efficiency, high power Solid State Amplifiers (SSPA) and Block Upconverters (BUC). Gilat's comprehensive solutions support multiple applications with a full portfolio of products to address key applications including broadband access, cellular backhaul, enterprise, in-flight connectivity, maritime, trains, defense and public safety.

Glavkosmos is a subsidiary of Roscosmos. Glavkosmos promotes Russian space products and services globally and manages complex international projects. Since 2019, Glavkosmos has been running foreign economic activities of Roscosmos. The company has successfully fulfilled over 140 international contracts, including the launch of more than 170 spacecraft as a rideshare payload. Glavkosmos is a prime contractor for Soyuz-ST-B commercial launches from the Guiana Space Center, launches of OneWeb satellites under contracts with the European launch services provider Arianespace and commercial human space flights. In 2019, Glavkosmos launched a webstore of products and components from the Russian space enterprises. In 2020, the company opened the 1st official space gift webstore.

GomSpace is a globally leading manufacturer and supplier of cubesat & small satellite solutions for customers in the academic, government and commercial markets. Our positions of strength include systems integration, cubesat platforms, advanced miniaturized radio technology and satellite operations. Our international team is devoted to understanding our customer's requirements and to delivering flawlessly. We are more than 130 employees, from many different nationalities, and we serve our customers in more than 60 countries.

HawkEye 360 is a Radio Frequency (RF) data analytics company. We operate the first of its kind commercial satellite constellation to identify, process, and geolocate a broad set of RF signals. With this unique data set and our suite of proprietary processing and machine learning tools, we create powerful data analytic products that solve hard challenges for our global customers. Our products include maritime domain awareness and spectrum mapping and monitoring designed to serve a wide range of commercial, government and international customers.

SILVER SPONSORS

ICEYE empowers commercial and government partners with unmatched persistent monitoring capabilities for any location on Earth. The company helps customers make informed, data-driven decisions to address time-critical challenges in various industries, to ensure infrastructure safety, and to protect the environment. ICEYE's radar satellite imaging service, designed to deliver very frequent coverage, both day and night, helps clients resolve challenges in sectors such as maritime, disaster management, insurance, and finance.

INTEGRASYS, established in 1990, 31 years ago. The company was founded by the Marquess of Antella and a team of Hewlett Packard engineers. Since then we have developed technologies for streamlining communications, especially in satellite network environments.
Integrasys is a software development and engineering company specialized in satellite network design, deployment, maintenance, and interference mitigation tools for monitoring critical satellite infrastructure in the commercial and defense fields, offering a wide range of signal monitoring products and VSAT Deployment, maintenance, and link budget solutions for telcos, satellite service providers, satellite operators and governments around the globe.

Established over 25 years ago with 97 commercial Proton launches and 100% mission success in the last 6 years, ILS offers tailored services from contract management to licensing, and mission management. ILS solely markets Proton, Angara 1.2 and Angara 5 launch services, and also markets launch services on the venerable Soyuz 2 and Soyuz 5 launch vehicles. ILS also now offers private human spaceflights on Soyuz with flights to and onboard the ISS from the Baikonur Cosmodrome. With the expertise of ILS, Khrunichev Space Center and Glavkosmos teams, ILS continues to evolve with flexible launch solutions and cost-effective access to space for global customers. ILS is a U.S. company headquartered in Reston, VA. Visit us at www.ilslaunch.com, Facebook, Twitter, LinkedIn, Instagram & YouTube.

Iridium® is the only mobile voice and data satellite communications network that spans the entire globe. Iridium enables connections between people, organizations and assets to and from anywhere, in real time. Together with its ecosystem of partner companies, Iridium delivers an innovative and rich portfolio of reliable solutions for markets that require truly global communications. In 2019, the company completed a generational upgrade of its satellite network and launched its new specialty broadband service, Iridium Certus®. Iridium Communications Inc. is headquartered in McLean, Va., U.S.A., and its common stock trades on the Nasdaq Global Select Market under the ticker symbol IRDM. For more information about Iridium products, services and partner solutions, visit www.iridium.com.

Founded in 2018 and based in Germany, Isar Aerospace develops and builds launch vehicles for transporting small & medium-sized satellites as well as satellite constellations into Earth's orbit. The company is privately financed by former SpaceX VP Bulent Altan as well as leading investors including Airbus Ventures, Apeiron, Earlybird, HV Capital, Lakestar, Lombard Odier, Porsche SE, UVC Partners, and Vsquared Ventures. Offering the first fully privately funded European solution to meet the growing demand, Isar Aerospace is driving commercial space across all continents. With our launch vehicle Spectrum specifically designed for small & medium satellites we offer our customers different launch configurations with an easy-to-book service, maximum flexibility, availability, and pricing options.

SILVER SPONSORS

Isotropic Systems is developing the world's first multi-service, high-bandwidth, low power, fully integrated high throughput terminals designed to support the satellite industry to 'reach beyond' traditional markets and acquire new customers with a full suite of high throughput services. Our unique and exciting technology is critical for the success of next-generation satellite systems and our innovation is a key component in helping to drive the growth of the space sector as it responds to the ever-increasing demand for commercial and defense connectivity services on land, in the air and at sea.
www.isotropicsystems.com

Kayrros is a leading data analytics company that monitors and measures energy, natural resources, and industrial activity using satellite imagery, geolocation data, and market information. We combine machine learning, data science, and advanced math to bring unique insights and customer-specific solutions for decision-making in various industries.

KSAT, Kongsberg Satellite Services, is the market leader in providing communication services between spacecraft and launch vehicles and Earth. Supporting a total of 76,000 satellite passes a month, our extensive global network of over 260 antennas at 25 sites across the globe, from Svalbard to Antarctica, is constantly expanding. KSAT also delivers Earth Observation services derived from the largest portfolio of satellites, including both Synthetic Aperture Radar (SAR) and high-resolution optical satellite data. Providing a variety of EO products and environmental monitoring services like vessel detection, oil spill monitoring, ice- and land-based information, our unique ground network tailored to provide data and services in near real-time, ensures responsive access.

Leaf Space operates and continues to develop a solid and reliable distributed ground station infrastructure for a world where Space is for everyone, up there to be discovered and explored with small, versatile and cost-effective Smallsats. Our unique concept is focused on creating satellite telecommunications as-a-service, in order to assist clients with their satellite operations by managing and procuring the entire ground segment system through a complete set of services, including timeshared access to ground, customize telecommunication solutions, ground station procurement, consultancy and backup services. The outsourcing strategy for communications significantly reduces cost and development time for any Smallsat operator who relies on us, turning ground segment into a predictable recurring cost.

Serving the world from its Canadian home and global offices, MDA is an international space mission partner and robotics, satellite systems and geointelligence pioneer with a 50-year story of firsts on and above the Earth. With 2,000 employees in Canada, the US and the UK, MDA is leading the charge towards viable Moon colonies, enhanced Earth observation, communication in a hyper-connected world, and more. With a track record of making ambitions come true, MDA enables highly skilled people to continually push boundaries, tackle big challenges, and imagine solutions that inspire and endure to change the world for the better, on the ground and in the stars.

SILVER SPONSORS

Mynaric is a manufacturer of free-space optical laser communication technologies used to enable communication and surveillance applications in air and space. Its laser data transmission products include flight terminals, which allow very large quantities of data to be sent wirelessly and securely over long distances between aircraft, autonomous drones, high-altitude platforms, satellites and the ground. Data networks are today largely based on infrastructure on the ground, which cannot be expanded arbitrarily for legal, economic or practical reasons. The future therefore calls for an expansion of the existing network infrastructure into air and space. With its serial produced optical laser communication products Mynaric is positioned as a pioneer in this growth market.

NorthStar's mission is to empower humanity to preserve our planet by putting into place a unique Space and Earth information platform dedicated to space-based Space Situational Awareness and Earth Intelligence. Starting in 2021 and based on a satellite constellation equipped with Hyperspectral, Infrared and Optical sensors, the platform will operate continuously from space, imaging, digitizing and analyzing the details of Earth's ecosystems and surrounding orbit on a daily basis. It will transform the way governments, industry and NGOs assess risk, enforce regulations and make decisions to foster the sustainable development of our planet and deliver a safe and secure near-space environment for the global satellite community.

Orbital Insight is the geospatial analytics company that helps organizations understand what's happening on and to the Earth. Customers including Unilever, Airbus, RBC Capital Markets, The World Bank and the U.S. Department of Defense use Orbital Insight's self-service analytics platform to make smarter business decisions, build sustainable supply chains and improve national security. Headquartered in Palo Alto, Calif., Orbital Insight is backed by Sequoia, GV and Goldman Sachs.

Planet is the leading provider of global, daily satellite imagery and geospatial solutions. Planet is driven by a mission to image all of Earth's landmass every day, and make global change visible, accessible and actionable. Founded in 2010 by three NASA scientists, Planet designs, builds, and operates the largest earth observation fleet of satellites, and provides the online software, tools and analytics that enable users to simply and effectively derive value from satellite imagery. To learn more visit www.planet.com and follow us on Twitter at @planet.

Preligens was created in 2016 by 2 French engineers, Arnaud Guérin and Renaud Allioux, on the belief that humans, namely intelligence professionals would never be able to cope with the tsunami of data made available by the huge investments put into sensors. They had the idea to use Artificial Intelligence to automate the analysis of these multi sources data and tip and cue analysts towards unusual events requiring their tradecraft. Our mission at Preligens is to enhance operational decision making to build a safer world.

SILVER SPONSORS

Ramon.Space is a leader in space-resilient computing systems that bring supercomputing to space. Powered by its unique AI/ML processors, Ramon. Space's software-defined systems enable the realization of earth-like computing capabilities in space. The company's proven technology is already deployed in space and used in many satellites and more than 50 space missions across the solar system – with zero failures.

RBC Signals is a global space communications provider serving satellite operators in GEO, LEO, & MEO with an improved model for the delivery and processing of data from satellites in orbit. The company's worldwide network includes both company-owned and partner-owned antennas, capitalizing on the sharing economy model, for best-in-class services offering affordability, flexibility and low latency.

Rocket Lab is a leading end-to-end space company delivering reliable satellites, launch services and on-orbit management solutions that make space easy. We are motivated by the impact we can have on Earth by making it easier to get to space and use it as a platform for innovation, exploration and infrastructure. Founded in 2006 and headquartered in Long Beach, California, Rocket Lab designs and manufactures the Electron and Neutron launch vehicles, Photon satellite platform and a range of best-in-class spacecraft components. Since its first orbital launch in January 2018, Rocket Lab has delivered more than 100 satellites to orbit for government and commercial customers, enabling remote sensing, communications, Earth-observation, technology demonstrations and more.

Safran Data Systems provides high-technology products and solutions for satellite ground stations. Space agencies, satellites providers, service operators and governmental agencies benefit from competitive advantages based on high performance, scalability, reliability, sustainability and long-term availability. With a high-skilled international team, we contribute to the success of our customers by offering innovation, best performance, reliability and sustainability.

SatADSL, founded in 2011, is an award-winning satellite service provider based in Belgium, delivering innovative solutions worldwide to satellite operators, teleport & hub operators, government and enterprise bodies, and ISPs. Active on all continents and already connected to more than 15 teleports and 25 satellites, SatADSL offers the world's first satellite aggregation system, acting as a capacity broker connecting teleports with new customers and markets via its flagship neXat platform. Our PaaS offering, neXat, is a virtual OSS/BSS that allows teleport and hub operators to offer the full range of SatADSL's value added services to their own clients and provides classical and packaged connectivity services through it's network of ISPs or directly to end users.

SILVER SPONSORS

Satellite Vu was founded to bring satellite technology to address our global challenges. We will monitor the temperature of any structure on the planet in near real-time using a new satellite technology to determine valuable insights into economic activity, energy efficiency and carbon footprint. Satellite Vu's unique high-resolution infrared dataset will enable better business decisions and accelerate our journey to net zero. We bring a new category of satellite data to solve our global challenges. Satellite Vu will effectively provide the Earth's Smart Energy Meter in Space. In Oct 2021, Satellite Vu raised a £15m Series A round led by Seraphim Capital to launch the world's first satellite constellation capable of imaging the thermal footprint of any building on the planet every 1-2 hours.

Satellogic is creating a searchable Earth to help decision-makers tackle the biggest challenges of our time with a complete picture of the planet.
Founded in 2010, Satellogic is a vertically integrated Earth Observation satellite and data company that designs, manufactures, and operates its own fleet of satellites. Each satellite delivers high-frequency, high-resolution multispectral and hyperspectral imagery plus full-motion video. Satellogic anticipates completing its Aleph-1 constellation of 300+ satellites by 2025, which will enable daily remaps of the entire planet.
For more information, please visit www.satellogic.com

SI was founded in 1999 by the engineers who developed the first Korean satellite and a series of advanced small satellites. We have been focusing on developing high-performance small/medium satellite systems for Earth observation missions. We have contributed to the success of over 30 international and domestic space programs over the past 30 years.
With two subsidiaries, the SI group has four vertically-integrated business areas in Earth observation. The parent company, SI provides Earth observation satellite and ground systems, SI Imaging Services focuses on satellite imagery distribution services, and SI Analytics provides AI-based geospatial analytics services.

SFL generates bigger returns from smaller, lower cost satellites. Small satellites built by SFL consistently push the performance envelope and disrupt the traditional cost paradigm. Satellites are built with advanced power systems, stringent attitude control and high-volume data capacity that are striking relative to the budget. SFL arranges launches globally and maintains a mission control center accessing ground stations worldwide. The pioneering and barrier-breaking work of SFL is a key enabler to tomorrow's cost aggressive satellite constellations.

SpaceBridge Inc. is an established supplier in broadband satellite communications systems technology headquartered in Montreal, Canada. The company develops and provides satellite network equipment, services and cloud-based autonomous managed services for its customers. This helps them to eliminate initial large CapEx investments and save on network management OpEX. SpaceBridge Inc.'s diverse portfolio includes the ASAT™ product line, which serves different verticals with various technologies and applications. Key areas of focus are Cellular Backhaul for 2G/3G/4G and 5G, Industrial Internet of Things-IIoT, Commercial and Military Satcoms-OnThe-Move, High-Speed Broadband, Multicast IPTV, Voice-over-IP, Videoconferencing, L2/L3 VPN, Virtual Network Operator, and HD/UHD TV Broadcasting.

SILVER SPONSORS

Located in Beijing, SpaceWill Info. Co., Ltd. ('SpaceWill') is a leading provider of EO satellite data and geospatial information services. The company business covers optical and SAR satellite imagery, data processing, value-added products, software and solutions for RS Satellite Ground Receiving Station.
SpaceWill is the global marketing operator for SuperView-1 constellation, the resolution is 50 cm and revisiting in 1 day with 4 satellites. SpaceWill is authorized distributor for other Chinese EO satellite data, including GF-4, GF-3, GF-2, GF-1, ZY-3 and ZY-3 02 etc. Based on the satellites resources, SpaceWill provides complete solution for various projects.

SpaceX designs, manufactures, and launches advanced rockets and spacecraft. The company was founded in 2002 by Elon Musk to revolutionize space transportation, with the ultimate goal of enabling people to live on other planets. Today, SpaceX is advancing the boundaries of space technology through its Falcon launch vehicles and Dragon spacecraft.

Swedish Space Corporation (SSC) helps space organizations, companies and research institutes to get access to space – enabling successful space projects within earth observation, telecommunications, security, meteorology, navigation and positioning, scientific research and much more.As a global leader in ground station services, SSC supports spacecraft operators in any orbit, from LEO to Lunar and beyond. From our ground stations located on every continent, SSC serves multi-mission customers across the complete lifespan of their spacecraft.SSC also operates the busiest and fastest growing commercial spaceport on European mainland – Esrange Space Center. Targeting to launch satellites into orbit by 2022, SSC has recently enlarged its service offer with multiple associated testbed services.

iDirect is a global leader in IP-based satellite communications providing technology and solutions that enable our partners worldwide to optimize their networks, differentiate their services and profitably expand their businesses.
For more than 20 years, the iDirect organization has focused on meeting the economic and technology challenges across the satellite industry. Today, the product portfolio sets new standards in performance and efficiency, making it possible to deliver voice, video and data connectivity anywhere in the world. iDirect is the world's largest TDMA enterprise VSAT manufacturer and is the leader in key industries including mobility, military/government and cellular backhaul.

Synspective provides one-stop-solutions using geospatial data from its own SAR satellites, with a mission to create a learning world based on real data.
The core technology was developed by the ImPACT program led by The Cabinet Office, Government of Japan. Synspective is building a constellation of small SAR satellites to provide data and analytics information to governments and commercial outfits. Synspectve is the only company in the world that both operates SAR satellites to acquire new data and has its own in-house analytic capabilities.

SILVER SPONSORS

Unseenlabs is a French company, European leader in signals intelligence (SIGINT) in the electromagnetic spectrum from space. Founded in 2015 by Jonathan Galic and Clément Galic, the company aims at providing public and private actors in maritime surveillance with a new type of data. To this end they developed a satellite payload embedded with a unique radiofrequency detection technology, deployed on a satellite constellation. In 2019, Unseenlabs became the first private French company to get to space with the launch of BRO-1, first 6U Cubesat of its constellation. Today, Unseenlabs has the most developed constellation in the field of RF detection from space, with its 4 mono-satellites.

UP42 is changing the way geospatial data is accessed and analyzed. It is a marketplace and developer platform providing easy access to both data and analytics from multiple sources. Developers and data scientists across all industries now have access to a platform to build, run, and scale projects in one place.

Virgin Orbit's LauncherOne system is a dedicated, affordable and responsive launch service for commercial and government-built small satellites. LauncherOne rockets are made in the USA in Long Beach, California, and will be air-launched from a dedicated 747-400 carrier aircraft capable of operating from many locations in order to best serve each customer's needs. Virgin Orbit's systems are currently in an advanced stage of testing, with initial orbital launches expected soon.

York Space Systems is leading the industry in transforming and enabling next-generation space missions worldwide. York specializes in rapid production of complete mission-ready spacecraft platforms leveraging commercial development applied to government and commercial missions. York's complete solution includes spacecraft production, payload integration, system integration and test, launch services, ground segment services, and mission operations. York's proven S-CLASS and LX-CLASS platforms are standardized spacecraft platforms executing ISR, remote proximity, weather, and communication missions. When combined with York's cloud-based mission tasking and autonomous operations center, customers get an ultra-low-cost solution for on-demand data collection and analytics.

Supporting you throughout the complete lifecycle of your satellite projects

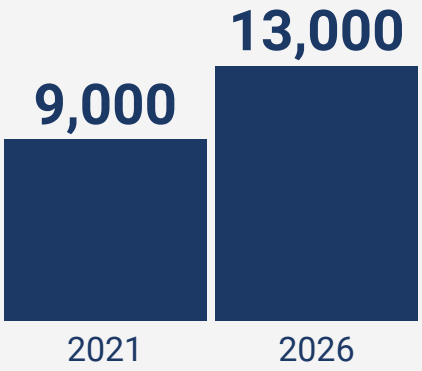
With a robust experience and unique positioning, Satconsult supports commercial and governmental players in the implementation of sustainable satellite-based telecommunications and remote sensing infrastructure worldwide.

Satconsult
Member of Euroconsult Group

satconsult.eu

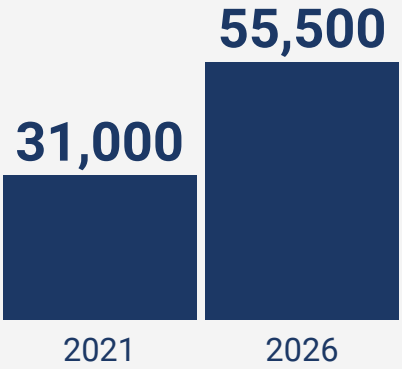
CONNECTIVITY IN THE SKY AND AT SEA TO LEVERAGE NEXT-GEN CAPABILITIES

NUMBER OF CONNECTED AIRCRAFT



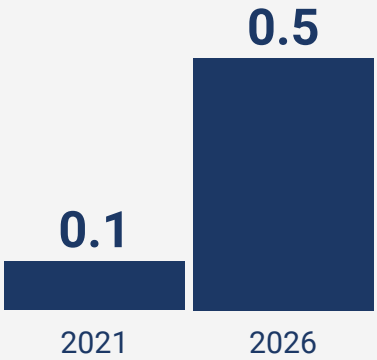
Source: Prospects for In-Flight Entertainment and Connectivity, 2021 edition, Euroconsult

NUMBER OF SHIPS CONNECTED WITH VSAT



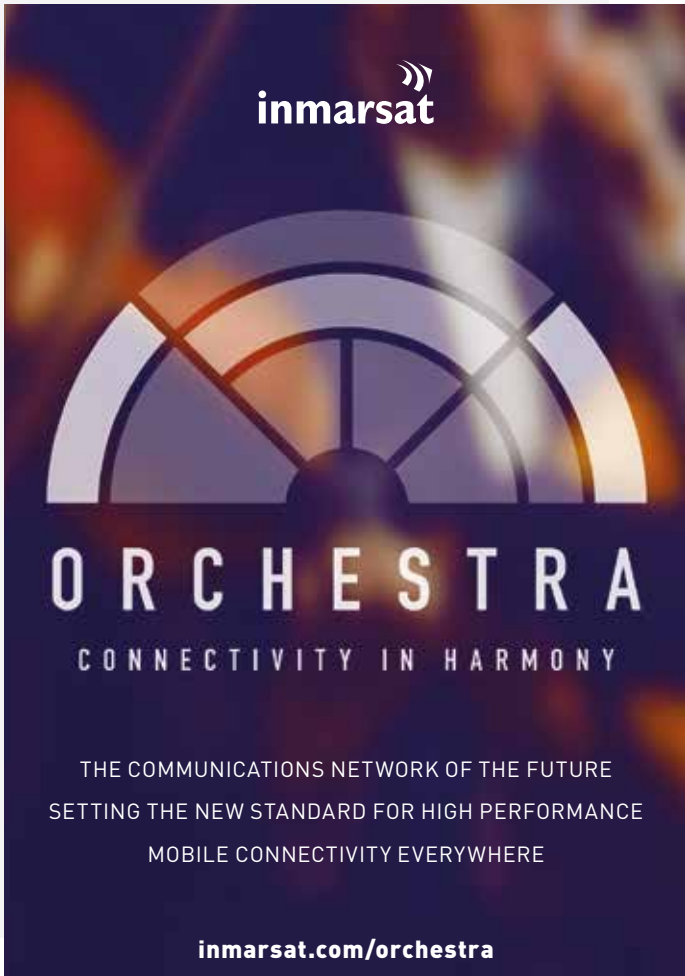
Source: Prospects for Maritime Satellite Communications, 2021 edition, Euroconsult

LEASED SATELLITE CAPACITY, *in Tbps*



Source: Euroconsult Market Intelligence

Mobility segments have been impacted in diverse ways by the pandemic. Commercial airlines and cruise shipping companies have suffered the most, experiencing a partial recovery only in 2021. Other segments felt impacts in places but maintained higher levels of activity. These dynamics led the connectivity ecosystem to adapt, with several companies restructuring and several M&A transactions. One consequence has been accelerated digitization of the industry.
The willingness to offer a better broadband experience for passengers and crew as well as to enhance operations has resulted in a need for higher data plans and to leverage new technologies. New flexible GEO and NGSO networks, among other innovations, should contribute to a 10x increase in leased capacity, with this usage reaching over 1 Tbps in the second part of the decade.



MEDIA PARTNERS

Connectivity Business is keenly focused on reporting the news and trends of investment in the connectivity sector. We seek to track, understand, and foster connectivity investment, and help the connectivity industry advance.
What makes Connectivity Business unique is its concentration on connectivity investment, including mergers and acquisitions, venture capital and developments in capital markets that have implications for companies in space services, telecom and investment. Connectivity Business gives its readers deep analysis on key funding trends. In addition to market reports, Connectivity Business also shares valuable data and presents an annual must-attend conference for serious connectivity investment.

With the vision of 'Making a Difference through Geospatial Knowledge in World Economy and Society', Geospatial World has been working on developing the geospatial industry for more than two decades. Geospatial World achieves its objectives by publishing content on geospatial technologies, trends, policies and applications by the Media Division of the Company. The Consultancy Division, undertakes research and business consulting and produces industry reports on market behavior, requirements, challenges and prospects of geospatial information and applications for society and economy. In addition, the Events Division organizes national and international conferences that are considered as most sought-after platforms for fruitful engagements and great networking opportunities.

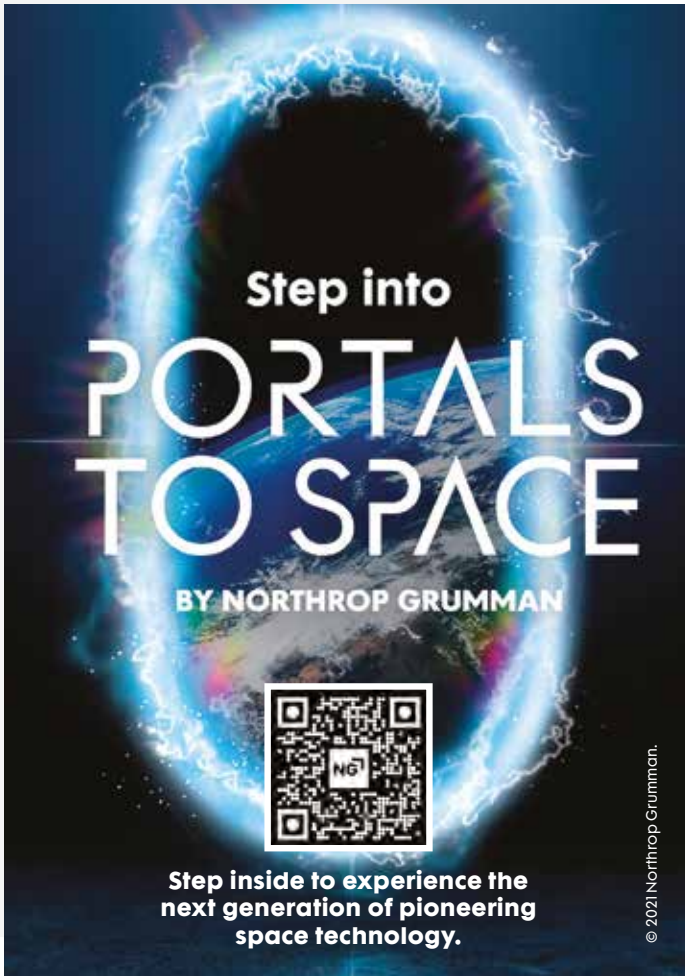
Founded in 1983 SatNews is a leading provider of satellite events, news, publications, research and other satellite industry information in both commercial and military enterprises worldwide. Publications include a Daily and Weekly e-newsletter for breaking news within the satellite industry, a Weekly SmallSatellite News Update, and two prestigious magazines published each month (SatMagazine and MilsatMagazine). Based in the San Francisco Bay Area, SatNews Publishers is proud to host Satellite Innovation (October), SmallSat Symposium (February) and MilSat Symposium (June). Visit our website for full details: www.satnews.com Contact us: Teresa Sanderson Director of Operations | SatNews Publishers. Address: 800 Siesta Way | Sonoma, CA 95476. Tel: (707) 939-9306 | Fax: (707) 939-9235

SpaceIntelReport.com is the leading source for analysis, interviews, business and trend information for the space industry. As the only website dedicated to key decision makers our editorial approach of what it means rather than simply the news of what just happened has made SpaceIntelReport a must read among busy space leaders in the Civil and Commercial space industries.

MEDIA PARTNERS

For over three decades, SpaceNews has been the only publication and website that space professionals throughout the world turn to first. Whether for the latest trends in military space capabilities, developments in satellite communications, or the current status of a budget, you can count on SpaceNews to keep you informed. We provide comprehensive coverage of the space industry, and a critical perspective you can rely on through our news, commentary, and analysis.

SpaceWatch.Global is a digital magazine and portal for those interested in space and the far-reaching impact that space developments have. While showcasing the technology that enables the industry to edge closer to the next frontier, SpaceWatch.Global also provides analysis, forecasts and insight into the geopolitical implications of space developments. From space policy, exploration and missions to space weapons and technology, we provide a complete perspective on the global space sector. SpaceWatch.Global is published by ThorGroup GmbH, headquartered in Bern, Switzerland. In the true Swiss spirit, neutrality, ethics and integrity are at our core. SpaceWatch.Global abides by the Society of Professional Journalists' code of ethics; we seek truth and report it.



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For 35 years, Via Satellite has provided essential news and expert business analysis on the global commercial communications satellite industry, including current and evolving applications, infrastructure issues, technology, and business and regulatory developments around the world. Top satellite executives from 160 countries read Via Satellite to fully understand the industry and maximize their companies' profits.

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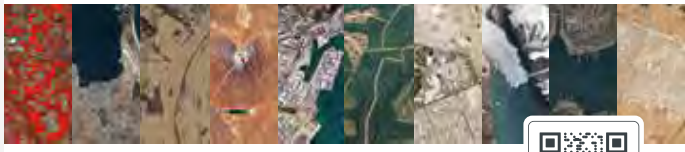

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STRONG MOMENTUM IN FINANCING FOR SPACE BUSINESSES

Space businesses attracted more than $7.5 billion in equity investment in 2021. More startup companies have now completed their second or third financing rounds.

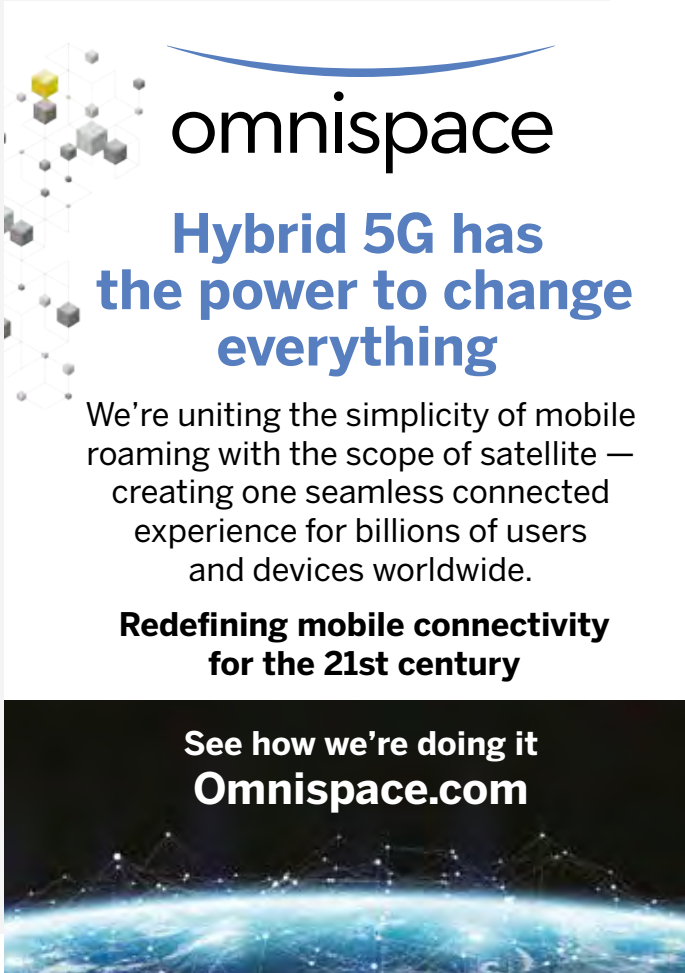
Financing of space businesses was extremely dynamic in 2021. The promise of potentially high value creation through disruptive concepts, combined with the large liquidity available to investors, have supported more than $7.5 billion being raised. Twelve mergers between special purpose acquisition companies (SPACs) and space companies have been completed or announced, with more than $4.5 billion raised. Those transactions have offered high valuations, under the promise of strong revenue uptake in the next few years. In parallel, strategic investors have also invested and/or confirmed their positions. One reference example has been the around $1.5 billion in additional funding brought by Bharti Global, Eutelsat and Hanwha into OneWeb.

While half of the fundraising benefited U.S. companies, several businesses in Europe and Asia also raised funding, such as Xingyun, Isotropic and Isar Aerospace. The relatively lower valuation of companies located outside the U.S. could result in greater focus, as suggested by several new venture capital funds being created in Europe such as CosmiCapital, Alpine Venture and Primo Space Ventures as well as Seraphim Capital being listed on the stock exchange.

Company performances and conditions in the financial markets will drive the evolution of the current momentum.

	# of SPACs merger announcement	Amount raised, *in Billion USD*
Manufacturing and launch	5	2
Space logistics	2	0.4
Earth observation	4	1.7
Connectivity	2	0.9

Source: Euroconsult Market Intelligence



INDUSTRY TRANSFORMATION CREATING CONDITIONS FOR MORE M&A TRANSACTIONS

More transactions have started to reshape parts of the space ecosystem in the last two years. We anticipate this trend to continue and potentially accelerate in the coming months.

The last 18 months have seen the potential start of a new wave of mergers and acquisitions. We have recorded over 40 mergers and acquisitions in the space and satellite sector.

No fewer than 10 transactions involved satellite communication operators and service companies. These have included Intelsat's acquisition of Gogo's commercial airline activity, Eutelsat's acquisition of stakes into OneWeb and Marlink's acquisition of ITC Global, to name a few. More recently, Viasat and Inmarsat have announced a merger agreement.
In EO, the recent focus mainly has been on SPAC transactions, while the most prominent M&A transactions include Spire acquiring ExactEarth, Planet acquiring VanderSat and Maxar's acquisition of Vricon. In industrial activities, the 2021 M&A announcements include Redwire's acquisition of Oakman Aerospace, Lockheed Martin's acquisition of Aerojet Rocketdyne, Raytheon Intelligence & Space acquiring SEAKR Technologies and Voyager Space acquiring propulsion company Valley Tech Systems.

Several drivers should favor new transactions through the entire ecosystem:

- The introduction of new offers, and the challenges that apply to legacy activities, should support initiatives by incumbent satellite companies.
- The large volumes of cash raised by several companies in recent months could lead them to consider acquiring third-party activities, in addition to investing into organic activities.

As such, a sustained level of M&A activity is anticipated, despite the complexities that can apply to mergers among space companies, especially when they involve sensitive government activities.

> 40

M&A transactions in 2020 - 2021

KNOWLEDGE PARTNERS

APSCC is a non-profit international association representing all sectors of satellite and space-related industries. The Organization's mission is to promote the industry growth and accelerate the efficient introduction of services and businesses via satellites in the region. APSCC provides its members with a platform to exchange views and ideas on technologies, systems, policies, satellite services as well as outer space activities through its publications and industry events. The APSCC 2021 Webinar Series live plays out Tuesdays at 9 am Hong Kong and Singapore time. Visit www.apsccsat.com and www.apscc.or.kr for more information.

ESOA represents 22 satellite operators and provides thought-leadership for the sector. It is recognised as the representative body for satellite operators by international, regional and national bodies including regulators, policymakers, standards-setting organisations such as 3GPP and international organisations such as the International Telecommunications Union and the World Economic Forum. As the world's only CEO-driven satellite association, ESOA leads the sector's response to global challenges and opportunities. It offers a unified voice for the world's largest operators, important regional operators and other companies that engage in satellite-related activities.

GVF is the unified voice of the satellite industry and has been for more than 20 years. Based in London and with a regional office in Washington DC, GVF brings together organizations from around the world across the breadth of the satellite ecosystem, organizations that are engaged in the development and delivery of satellite technologies and services for business, government, and consumers worldwide. GVF facilitates expanded access to satellite-based connectivity solutions globally, achieved through regulatory, policy and spectrum advocacy; training and certification; product quality assurance; collaboration with user groups and other satellite stakeholders; and, through events, Working Groups and other platforms to promote dialogue on growing satellite markets and solutions.

Mobile satellite communications are revolutionizing the operations of maritime, aeronautical, enterprise businesses and governments worldwide. The Mobile Satellite Users Association is a non-profit association dedicated to promoting satellite innovations worldwide. The association fosters the exchange of news, information and ideas among mobile satellite users and providers with a focus on communications, navigation, safety and more. MSUA sponsors the annual Mobile Satellite Innovation Awards celebrating the top market-proven mobile advancements and collaborates with conference organizers around the world to shape and facilitate conference programming dedicated to satellite industry development.

Since 1985, the World Teleport Association (WTA) has been the only trade association that focuses on the business of satellite communications from the ground up. At the core of its membership are the world's most innovative operators of teleports, from independents to multinationals, niche service providers to global carriers. WTA is dedicated to advocating for the interests of teleport operators in the global telecommunications market and promoting excellence in teleport business practice, technology and operations. Companies that do business with teleports also find that WTA is the best investment they can make to open new channels to the industry.

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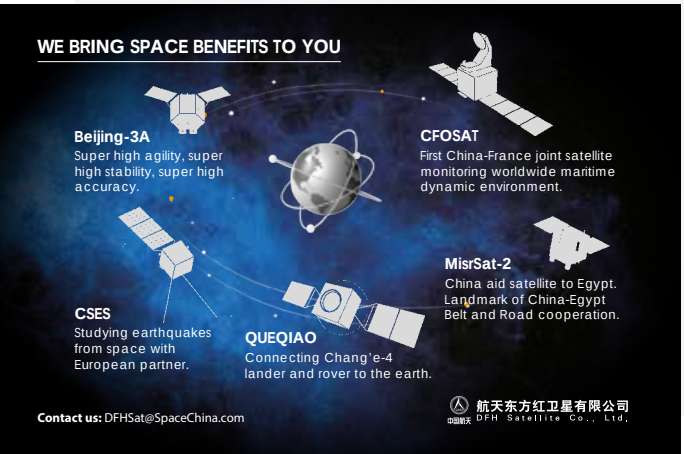
Tuesday, December 14

Microsoft Azure

Wednesday, December 15

NORTHROP GRUMMAN



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From December 13-16

AIRBUS
SPACEBRIDGE ALL THINGS CONNECTED
SAFRAN
Gilat
LEAFSPACE
UTIAS SFL 1998 20 YEARS 2018
Microsoft Azure
SURREY

From December 13-14

BLUE ORIGIN
OneWeb
INTEGRASYS
SatADSL
KYMETA
Viasat
mynaric

From December 15-16

SPACE IMAGING MIDDLE EAST
SSC Swedish Space Corporation
GHGSAT

OFFICIAL MEETING ROOMS

AIRBUS	Saint Honoré December 13-16 Mont Thabor December 13-15 Castiglione December 13-15
arianespace arianegroup	2055 / 2056 / 2109 December 13-16
ASTRANIS	4039 December 13-15
aws	3084 December 13-16
BLACK SKY Be The First To Know	4015 December 15-16
BLUE ORIGIN	4007 December 13-16
BOEING	2063 / 2064 / 2065 December 13-16 Castiglione December 16

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Euroconsult Group	3015 December 13-16
eutelsat	3007 December 13
HawkEye 360	1051 / 1052 December 13-16
HUGHES An EchoStar Company	3009 December 13-15
ST Engineering powered by Newtec iDirect	3004 December 13-15
ILS	3001 December 13-16
INTELSAT	3063 December 13-16
KRATOS READY FOR WHAT'S NEXT™	3077 December 13-15
KYMETA™	3039 December 13-14
LOCKHEED MARTIN	2051 / 2052 December 13-16
MAXAR	Tuileries 1, 2 & 3 December 13-16

OFFICIAL MEETING ROOMS

MDA	4035 / 4036 December 13-16
Microsoft Azure	3036 / 3037 December 13-16
Milbank Space Smart	Feuillants December 13
MOMENTUS	3025 December 13-14
MJ SPACE CORP	2045 December 13-14
NORTHROP GRUMMAN	2035 / 2036 / 2037 December 13-16
omnispace	Vendôme December 13-15
OneWeb	2050 December 13-15
Relativity	3007 December 14-15
SENER	Mont Thabor December 16
SES	Rivoli December 13-15

OFFICIAL MEETING ROOMS

SPACELINK	**Feuillants** December 14-15
ThalesAlenia Space a Thales / Leonardo company	**1055 / 1056 / 1058 / 1059** December 13-16
TELESPAZIO a LEONARDO and THALES company	**3033** December 13-16
ULA	**1015 / 1016** December 13-16

MAP

CONFERENCE AREA
NETWORKING & BUSINESS MEETING AREA
WESTIN RECEPTION
BUSINESS CENTRE
ELEVATORS TO SUITES & ROOMS
ACCESS TO MEZZANINE (MEETING ROOMS)
RESTROOMS
CLOAKROOM
AIGLON
Second Conference Room
CONCORDE
Main Conference Room
IMPERIAL
Salon
NAPOLEON
Exhibition Room
RESTAURANT
'Le First'
Rue de Rivoli
CONSERVATORY
Exhibition Room
REGISTRATION AREA
PATIO
LOBBY
BAR
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