

# Global Software-Defined Satellite Market: Focus on End User, Mass, Orbit Technology, Subsystem, and Services - Analysis and Forecast, 2019-2030

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## Abstracts

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### Key Questions Answered in This Report:

What are the underlying structures resulting in the emerging trends within the software-defined satellite and technology industry?

What will be the expected market value of the leading segments and sub-segments of the global software defined satellite market in 2019?

What will be the expected competitive strength and market share analysis of software-defined satellite by operators and manufacturers?

How key technologies such as Reconfigurable payload, AI and cloud computation, and software-defined radios (SDRs) will witness growth over the coming years?

How is the analysis of software-defined satellite by orbit and by mass expected to help in future investments?

How is the service market associated with software-defined satellites, i.e. software as a service and satellite as a service expected to emerge during the forecast period?

How is each segment of the global software-defined satellite and technology market expected to grow during the forecast period and what is the expected revenue generated by each of the segments by the end of 2030?

Which end users such as commercial, government and defence, and academic will witness the highest growth during the forecast period, 2019-2030?

Which orbit among Low Earth Orbit (LEO), Medium Earth Orbit (MEO) and Geosynchronous Orbit (GEO) will dominate the market by 2030?

How different mass categories including heavy software-defined satellite, large software-defined satellite, medium software-defined satellite, and small software-defined satellite will grow over the coming years?

Which region among North America, Europe, Asia-Pacific, and Rest-of-the-World, dominated the software-defined satellite market in 2018?

Who are the current key players investing in software-defined satellites and technologies?

What are the influencing factors that may affect the market share of the key players in the coming future?

How is industry expected to evolve during the forecast period 2020-2030?

What are the key development strategies which are implemented by the chief players to sustain the competitive market?

What are the key strategies being adopted by major countries to accelerate research in software-defined satellites?

The study provides a detailed analysis of 15 key players in the global software-defined satellite market, including SSTL, SSL, The Boeing Company, Airbus S.A.S, Harris Corporation, SES, Eutelsat, Intelsat, Inmarsat, Spire Global, AIKO Space, Maxar Technologies, Lockheed Martin Corporation, Thales Group, Northrop Grumman Corporation, Vector Launch, NVIDIA, and IBM, among others, in the company profiles section. This section covers business financials, company snapshots, key products and services, major developments, future programs (if any), and the individual SWOT analysis

## Software-Defined Satellite Market Forecast, 2019-2030

The software-defined satellite market analysis by BIS Research projects the market to grow at a significant CAGR of 14.81% by value and 14.85% by volume, during the forecast period from 2019 to 2030. Europe dominated the global software-defined satellite market in 2018. Major countries such as the U.K. and France are the most prominent countries in Europe in the software-defined satellite market. During the forecast period, the Asia-Pacific is anticipated to grow at the highest rate due to an increasing requirement of advanced satellite to attain sustainability.

Until few years ago, conventional satellites were the optimum solutions to provide space-based applications such as communication, earth observation, and navigation, among others. However, the competition has grown largely with high agility and technological advancements in terrestrial technologies, which has led to an impending need for advancement in satellite enabling flexibility in order to be agile and compatible with terrestrial network. This revolutionized the advent of software-defined satellites, which are capable to alter the satellite parameters, such as power, coverage, frequency, and bandwidth, while the satellite is in-orbit. This technology attempts to offer capabilities with regard to flexibility in reconfiguring the satellite in order to meet the changing demands of the end users.

### Expert Quote

“Software-defined satellites are expected to emerge as a potential driver to uptake orders of commercial satellites in geostationary orbit (GEO). There has been a gradual decline in commercial GEO satellites from past four years, and the decline is anticipated to prolong during the coming years. This has led to tremendous technological betterment in satellite components by satellite manufacturers, wherein software-defined satellites are expected to emerge as a major technological advancement in this regard. These satellites are expected to change the market landscape of commercial GEO satellites over the coming years.”

### Scope of the Global Software-Defined Satellite Market

The software-defined satellite market research provides detailed market information for the number of software-defined satellite launches, subcomponents demand in the current scenario and by 2030. The purpose of this market analysis is to examine the

software-defined satellite market outlook in terms of market drivers, trends, technological developments, and funding scenario, among others.

The report further takes into consideration the market dynamics and the competitive landscape along with the detailed financial and product contribution of the key players operating in the market. The software-defined satellite market report is a compilation of different segments including market breakdown by end user, technology, orbit, mass, subsystem, and region.

## Market Segmentation

Types of subsystems included in the scope for software-defined satellite are payload, structure, telecommunication, on-board computer, power system, and attitude control system. The support subsystem, known as the satellite bus, comprises structure, telecommunication, on-board computer, power system and attitude control system. However, the payload which is software-defined is considered as the central unit of a software-defined satellite, responsible for providing core functionality and purpose for a particular application. Payload subsystem dominated the software-defined satellite market in 2018 and is anticipated to maintain its dominance throughout the forecast period (2019-2030).

Software-defined satellites are utilized by various end users such as academic, commercial, and government. Academic end users are mainly the educational institutes and universities, which are developing their own software-defined satellites for space exploration and scientific research. Commercial end users basically comprise the commercial industries, such as oil and gas, mining, and agriculture, which are utilizing software-defined satellites for their product mapping and earth exploration. Government end users are primarily those space agencies which are operated by governments of different countries.

Software-defined satellites fall in different mass categories which includes heavy satellites, large satellites, medium satellites, and small satellites. Small software-defined satellite is currently the dominant segment in the market by volume in the market in 2018. The large-scale market penetration is due to deployment of Spire global small satellite constellations equipped with software-defined radios (SDRs) and small satellites for technology demonstration purpose.

This segment provides a detailed analysis on different types of orbits for software-defined satellites. The three orbits included in the scope of the report are Medium Earth

Orbit (MEO), Low Earth Orbit (LEO), Geosynchronous Earth Orbit (GEO). In terms of number of software-defined satellites launches, LEO witnessed the highest number of launches in software-defined satellite market in 2018. The ongoing research activities around software-defined satellites for LEO is expected to support the software-defined satellite market growth in the orbit. Moreover, launching a satellite in LEO is convenient and suitable in the initial testing period. Companies like Kepler Communications, Iridium Communications, Inc., and Telesat are working on LEO-based models for software-defined satellites in response to Astranis, Airbus and SES, who are actively manufacturing GEO-based software-defined satellites.

Where conventional satellites were earlier tailored to comply with single mission requirements, satellite developers are gradually adapting the vision of software-defined satellite which can be reprogrammed and reconfigured, to allow a satellite to take up new applications and expand its performance. Different technologies such as reconfigurable payload, artificial intelligence (AI) and cloud computing, and software-defined radio, embedded in the satellites allow them to be reconfigurable and flexible.

The software-defined satellite market is segregated by region under four major regions, namely North America, Europe, APAC, and Rest-of-the-World. Data for each of these regions (by end user and country) is also provided.

#### Key Companies in the Global Software-Defined Satellite Industry

The key market players in the global software-defined satellite market include SSTL, SSL, The Boeing Company, Airbus S.A.S, Harris Corporation, SES, Eutelsat, Intelsat, Inmarsat, Spire Global, AIKO Space, Maxar Technologies, Lockheed Martin Corporation, Thales Group, Northrop Grumman Corporation, Vector Launch, and NVIDIA, among others.

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