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Satellite Spectrum Monitoring Market - A Global and Regional Analysis: Focus on End User, Frequency, Solution, Service, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Introduction to Satellite Spectrum Monitoring Market

Satellite spectrum monitoring refers to the industry that develops and offers technologies, solutions, and services for monitoring and controlling the radio frequency spectrum utilized by satellites. It includes a variety of tasks, such as the creation of monitoring systems, software, analytics tools, and associated services. Spectrum monitoring allows companies to discover inactive frequency bands, improve frequency allocations, and prevent unlawful usage, resulting in increased spectrum efficiency. The satellite spectrum monitoring market is driven by several factors, including the surging demand for satellite-based communication systems and deep space communication networks. The application of satellite spectrum monitoring market is in various fields such as aerospace, marine, military, and government. Satellite spectrum monitoring enables the detection of illegal radio frequency interference (RFI) sources, which allows satellite operators to take necessary actions to limit interference and preserve the quality and reliability of satellite communication by recognizing and pinpointing sources of interference.

Market Introduction

Governments and organizations recognized the necessity to properly manage the restricted frequency spectrum for satellite communications with the launch of the first artificial satellites in the mid-20th century. As satellite technology advanced, monitoring and managing spectrum use became increasingly crucial. In the 1960s and 1970s,

satellite spectrum monitoring was primarily concerned with ensuring clear communications. Monitoring stations were established to detect and trace unauthorized broadcasts, unexpected interference, and signal quality issues. These early monitoring attempts relied on manual observation and basic instruments.

Currently, the trend toward more automated and software-defined monitoring systems is major progress. Traditional human monitoring methods have mostly been substituted by smart software systems capable of continually and automatically analyzing enormous amounts of spectrum data in real time. Advanced algorithms and machine learning approaches are used in these systems to detect and categorize diverse signals, identify interference sources, and offer operators actionable information.

Industrial Impact

The satellite spectrum monitoring solutions and technological advancements in the field are expected to have a positive impact on the global market for satellite spectrum monitoring. Several organizations, research institutes, and government agencies are working to introduce newer technologies into the global satellite spectrum monitoring market. When compared to satellite spectrum monitoring tools such as spectrum analyzers, antennas, and direction finders, the demand for vector signal analyzers stands out as the solution in high demand.

In recent years, satellite spectrum monitoring has registered an exponential surge in demand from the defense industry, with high demands for satellite spectrum monitoring solutions such as spectrum analyzers reaching record heights. Additionally, due to the rising demand for satellite services, the growth of satellite constellations, and the advent of new frequency bands for satellite communications, satellite spectrum monitoring has grown in significance during the past few years. For instance, in August 2022, Calian Group Ltd. signed a contract with NASA Goddard Space Flight Centre to supply a third highly effective antenna for the very long baseline interferometry (VLBI) global observing system (VGOS) of NASA. The NASA Space Geodesy Project, which works to maintain the global geodetic infrastructure of various networks and individual ground stations, including the NASA VGOS network of antennas, would use this 12m high-performance Calian antenna.

Market Segmentation:

Segmentation 1: by End User

Aerospace

Maritime

Oil and Gas

Military

Government

Telecom

Media and Entertainment

Military End User to Continue its Dominance as the Leading End User Segment

The satellite spectrum monitoring market is led by the military industry, with a 28.99% share in 2023. Rising military advancements and demands for satellite spectrum monitoring products and solutions in the coming years are driving the growth of the satellite spectrum monitoring market.

Satellite-based surveillance and information collection are made possible because of satellite spectrum monitoring in the military. Satellites with cutting-edge image and sensor technology offer crucial intelligence and reconnaissance data for military operations. Spectrum monitoring helps to ensure efficient data transfer, allocate satellite bandwidth efficiently, and find any interference that can impair surveillance capabilities. It is expected that the sales of satellite spectrum monitoring products and services will continue the same trend in the coming years and contribute significantly to the growth of the satellite spectrum monitoring market during the forecast period. For instance, the U.S. military uses satellite spectrum monitoring to improve its electronic warfare capabilities. The military can detect and identify possible threats, such as hostile radar systems or jamming efforts, by monitoring and analyzing the electromagnetic spectrum, including satellite communications bands. This data aids in the development of effective countermeasures and the security of military ISR activities. Also, to aid the military in ISR activities, Kratos' SpectralNet system for military ISR uses AI and machine learning to monitor the spectrum. It is capable of real-time monitoring, geolocation, and automatic interference identification and mitigation.

Segmentation 2: by Solution

Hardware

Software

Hardware to Witness the Highest Growth between 2023 and 2033

The satellite spectrum monitoring market is expected to be dominated by the hardware segment in 2023, with a 51.87% share in terms of revenue due to the high demand for satellite spectrum monitoring products and growing demand for analyzers, direction finders, and antennas, among others.

Additionally, the hardware segment comprises antennas, spectrum monitoring receivers, data processing and storage systems, and signal analyzers that make up hardware components in the satellite spectrum monitoring industry that are required for the collection, analysis, processing, and administration of radio frequency signals. These hardware solutions provide comprehensive spectrum monitoring, interference detection, spectrum utilization optimization, and regulatory compliance. The capabilities and efficacy of satellite spectrum monitoring systems are continually being enhanced via the development and integration of hardware technologies.

For instance, Anritsu Corporation’s Spectrum Analyzer/Signal Analyzer MS2850A is a spectrum analyzer/signal analyzer with a frequency range of 9 kHz to either 32 GHz or 44.5 GHz with a maximum analysis bandwidth of 1 GHz. It offers all-in-one coverage from the sub-6 GHz to millimeter-wave 28 GHz/39 GHz bands and supports wideband communications measurements, such as 5G mobile communications and broadcast satellite equipment.

Segmentation 3: by Region

North America - U.S. and Canada

Europe - U.K., Germany, France, and Rest-of-Europe

Asia-Pacific - Japan, India, China, and Rest-of-Asia-Pacific

Rest-of-the-World - Middle East and Africa, and Latin America

Europe was the highest-growing market among all the regions registering a CAGR of 8.68%. Europe is anticipated to gain traction in terms of satellite spectrum monitoring product production owing to the presence of a large number of satellite spectrum monitoring manufacturers such as CRFS Limited, Integrasys S.A, Sky and Space Company Limited, and Atos. Moreover, favorable government policies are also expected to support the growth of the satellite spectrum monitoring market in Europe and Asia-Pacific during the forecast period.

In Europe, France is anticipated to show the highest growth in the satellite spectrum monitoring market among other countries in Europe, such as U.K. and Germany. France is anticipated to grow at a CAGR of 9.27%. The growth of France in the satellite spectrum monitoring market is mainly due to the factors such as increasing demand for broadband connectivity and increasing support for space research and exploration.

Recent Developments in the Satellite Spectrum Monitoring Market

In November 2022, Rohde & Schwarz GmbH& Co. signed a contract with the German Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railway to supply them with 12 R&S PR200 portable monitoring receivers' addition to the 62 units delivered the year before. The R&S PR200 was picked by the regulatory body due to its superior RF characteristics, quick signal processing, and well-engineered operability.

In September 2022, National Instruments Corporation signed a partnership with ANDRO as its third-party software partner. It is a low-cost SDR that is frequently used for complicated system design and rapid prototyping. The USRP is a great choice for many applications, including basic record-and-playback devices, spectrum monitoring systems, and even complete cellular networks, because of its versatility, cost, and ease of use.

In August 2022, Calian Group Ltd. signed a contract with NASA Goddard Space Flight Centre to supply a third highly effective antenna for the very long baseline interferometry (VLBI) global observing system (VGOS) of NASA. The NASA Space Geodesy Project, which works to maintain the global geodetic infrastructure of various networks and individual ground stations, including the NASA VGOS network of antennas, would use this 12m high-performance Calian antenna.

Demand – Drivers and Limitations

Following are the drivers for the satellite spectrum monitoring market:

Increasing Demand for Satellite-Based Communication Services

Deep Space Communication Networks

Space Debris Mitigation

Following are the challenges for the satellite spectrum monitoring market:

High Equipment and Infrastructure Cost

Rapidly Evolving Technology

Following are the opportunities for the satellite spectrum monitoring market:

Increasing Adoption of Satellite Connectivity for IoT Applications

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of solutions available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the satellite spectrum monitoring market by end user (aerospace, maritime, oil and gas, military, government, telecom, and media and entertainment), solution (hardware and software), and service (software-as-a-service and spectrum monitoring as-a-service).

Growth/Marketing Strategy: The satellite spectrum monitoring market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been merger and acquisition to strengthen their position in the satellite spectrum monitoring market. For instance, in January 2021, Calian Group Ltd. acquired InterTronic Solutions Inc. High-accuracy, fast-moving motion systems are among the cutting-edge, very precise antenna solutions produced by InterTronic for use by military, scientific, and commercial clients. Radio astronomy, radar, electronic warfare, deep

space exploration, and satellite communications are among the industries where InterTronic systems are used.

Competitive Strategy: Key players in the satellite spectrum monitoring market analyzed and profiled in the study involve major satellite spectrum monitoring products and services offering companies providing hardware and software, respectively. Moreover, a detailed competitive benchmarking of the players operating in the satellite spectrum monitoring market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights, which are gathered from primary experts.

The top solution segment, which is leading, includes satellite spectrum monitoring hardware manufacturers that capture around 74% of the presence in the market. Players in other industries, such as satellite spectrum monitoring software manufacturers, account for approximately 26% of the presence in the market.

Key Companies Profiled:

Anritsu Corporation

Atos

Calian Group Ltd.

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info@marketpublishers.com

Clearbox Systems

CRFS Limited

EXFO Inc.

Integrasys S.A.

Keysight Technologies

Kratos Defense & Security Solutions, Inc.

Narda Safety Test Solutions

National Instruments Corporation

Rohde & Schwarz GmbH & Co

ST Engineering iDirect

SatSignature

Tektronix

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Contents

1 MARKETS

1.1 Industry Outlook
1.1.1 Role of Satellite Spectrum Monitoring in Satellite Communication Industry
1.1.2 Relevant System Solutions for SatCom Monitoring
1.2 Regulatory Framework of Key Countries
1.2.1 International Telecommunication Union (ITU) Regulations on Satellite Communications
1.3 Industry Trends
1.3.1 Non-Geostationary Satellite Operators (NGSO) Networks
1.3.2 Narrowband Internet of Things (NB-IoT)
1.3.3 Spectrum Sharing
1.4 Summary of Bands Covered by Current Projects
1.4.1 SKY Perfect JSAT C-Band Spectrum Monitoring Facility
1.4.2 National Science Foundation's Spectrum Innovation Initiative (SII)
1.4.3 MilSpace 2 Project
1.4.4 European Space Agency (ESA) Advanced Research in Telecommunications Systems (ARTES) Programme
1.5 Supply Chain Analysis
1.6 Business Dynamics
1.6.1 Business Drivers
1.6.1.1 Increasing Demand for Satellite-Based Communication Services
1.6.1.2 Deep Space Communication Networks
1.6.1.3 Space Debris Mitigation
1.6.2 Business Challenges
1.6.2.1 High Equipment and Infrastructure Cost
1.6.2.2 Rapidly Evolving Technology
1.6.3 Business Strategies
1.6.3.1 Partnerships, Collaborations, Agreements, and Contracts
1.6.3.2 Others
1.6.4 Business Opportunities
1.6.4.1 Increasing Adoption of Satellite Connectivity for IoT Applications

2 APPLICATION

2.1 Global Satellite Spectrum Monitoring Market (by End User)
2.1.1 Market Overview

2.1.1.1 Demand Analysis of Satellite Spectrum Monitoring Market (by End User)
2.1.2 Aerospace
2.1.3 Maritime
2.1.4 Oil and Gas
2.1.5 Military
2.1.6 Government
2.1.7 Media and Entertainment
2.1.8 Telecom

3 PRODUCTS

3.1 Global Satellite Spectrum Monitoring Market (by Frequency)
3.1.1 Market Overview
3.1.1.1 Demand Analysis for Global Satellite Spectrum Monitoring Market (by Frequency)
3.1.2 Very High Frequency (VHF) (30 MHz-300 MHz)
3.1.3 Ultra-High Frequency (UHF) (301 MHz-3 GHz)
3.1.4 Super High Frequency (SHF) (3 GHz-30 GHz)
3.1.5 Extremely High Frequency (EHF) (31 GHz-300 GHz)
3.2 Global Satellite Spectrum Monitoring Market (by Solution)
3.2.1 Market Overview
3.2.1.1 Demand Analysis for Global Satellite Spectrum Monitoring Market (by Solution)
3.2.2 Hardware
3.2.2.1 Antenna
3.2.2.2 Spectrum Analyzer/Signal Analyzer
3.2.2.2.1 Vector Signal Analyzer
3.2.2.2.1.1 Vector Signal Analyzer (by Form Factor)
3.2.2.2.1.1.1 Portable Vector Signal Analyzer
3.2.2.2.1.1.2 Benchtop Vector Signal Analyzer
3.2.2.2.1.1.3 Handheld Vector Signal Analyzer
3.2.2.2.2 Real-Time Spectrum Analyzer
3.2.2.2.2.1 Real-Time Spectrum Analyzer (by Form Factor)
3.2.2.2.2.1.1 Portable Real-Time Spectrum Analyzer
3.2.2.2.2.1.2 Benchtop Real-Time Spectrum Analyzer
3.2.2.2.2.1.3 Handheld Real-Time Spectrum Analyzer
3.2.2.3 Receiver
3.2.2.4 Direction Finders
3.2.3 Software

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4 SERVICE

4.1 Global Satellite Spectrum Monitoring Market (by Service)
4.1.1 Market Overview
4.1.1.1 Demand Analysis for Global Satellite Spectrum Monitoring Market (by Service)
4.1.2 Software-as-a-Service (Cloud-Based Spectrum Monitoring)
4.1.3 Spectrum Monitoring-as-a Service

5 REGION

5.1 Global Satellite Spectrum Monitoring Market (by Region)
5.2 North America
5.2.1 Market
5.2.1.1 Key Manufacturers and Suppliers in North America
5.2.1.2 Business Drivers
5.2.1.3 Business Challenges
5.2.2 Application
5.2.2.1 North America Satellite Spectrum Monitoring Market (by End User)
5.2.3 Service
5.2.3.1 North America Satellite Spectrum Monitoring Market (by Service)
5.2.4 North America (by Country)
5.2.4.1 U.S.
5.2.4.1.1 Market
5.2.4.1.1.1 Key Manufacturers and Suppliers in the U.S.
5.2.4.1.2 Application
5.2.4.1.2.1 U.S. Satellite Spectrum Monitoring Market (by End User)
5.2.4.2 Canada
5.2.4.2.1 Market
5.2.4.2.1.1 Key Manufacturers and Suppliers in Canada
5.2.4.2.2 Application
5.2.4.2.2.1 Canada Satellite Spectrum Monitoring Market (by End User)
5.3 Europe
5.3.1 Market
5.3.1.1 Key Manufacturers and Suppliers in Europe
5.3.1.2 Business Drivers
5.3.1.3 Business Challenges
5.3.2 Application

5.3.2.1 Europe Satellite Spectrum Monitoring Market (by End User)
5.3.3 Service
5.3.3.1 Europe Satellite Spectrum Monitoring Market (by Service)
5.3.4 Europe (by Country)
5.3.4.1 Germany
5.3.4.1.1 Market
5.3.4.1.1.1 Key Players in Germany
5.3.4.1.2 Application
5.3.4.1.2.1 Germany Satellite Spectrum Monitoring Market (by End User)
5.3.4.2 U.K.
5.3.4.2.1 Market
5.3.4.2.1.1 Key Manufacturers and Suppliers in the U.K.
5.3.4.2.2 Application
5.3.4.2.2.1 U.K. Satellite Spectrum Monitoring Market (by End User)
5.3.4.3 France
5.3.4.3.1 Market
5.3.4.3.1.1 Key Manufacturers and Service Providers in France
5.3.4.3.2 Application
5.3.4.3.2.1 France Satellite Spectrum Monitoring Market (by End User)
5.3.4.4 Rest-of-Europe
5.3.4.4.1 Application
5.3.4.4.1.1 Rest-of-Europe Satellite Spectrum Monitoring Market (by End User)
5.4 Asia-Pacific
5.4.1 Market
5.4.1.1 Key Manufacturers and Service Providers in Asia-Pacific
5.4.1.2 Business Drivers
5.4.1.3 Business Challenges
5.4.2 Application
5.4.2.1 Asia-Pacific Satellite Spectrum Monitoring Market (by End User)
5.4.3 Service
5.4.3.1 Asia-Pacific Satellite Spectrum Monitoring Market (by Service)
5.4.4 Asia-Pacific (by Country)
5.4.4.1 China
5.4.4.1.1 Market
5.4.4.1.1.1 Key Manufacturers and Service Providers in China
5.4.4.1.2 Application
5.4.4.1.2.1 China Satellite Spectrum Monitoring Market (by End User)
5.4.4.2 Japan
5.4.4.2.1 Market

5.4.4.2.1.1 Key Manufacturers and Service Providers in Japan
5.4.4.2.2 Application
5.4.4.2.3 Japan Satellite Spectrum Monitoring Market (by End User)
5.4.4.3 India
5.4.4.3.1 Market
5.4.4.3.1.1 Key Manufacturers and Service Providers in India
5.4.4.3.2 Application
5.4.4.3.2.1 India Satellite Spectrum Monitoring Market (by End User)
5.4.4.4 Rest-of-Asia-Pacific
5.4.4.4.1 Application
5.4.4.4.1.1 Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (by End User)
5.5 Rest-of-the-World
5.5.1 Market
5.5.1.1 Business Drivers
5.5.1.2 Business Challenges
5.5.2 Application
5.5.2.1 Rest-of-the-World Satellite Spectrum Monitoring Market (by End User)
5.5.3 Service
5.5.3.1 Rest-of-the-World Satellite Spectrum Monitoring Market (by Service)
5.5.4 Rest-of-the-World (by Region)
5.5.4.1 Middle East and Africa
5.5.4.1.1 Market
5.5.4.1.1.1 Business Drivers
5.5.4.1.1.2 Business Challenges
5.5.4.1.2 Application
5.5.4.1.2.1 Middle East and Africa Satellite Spectrum Monitoring Market (by End User)
5.5.4.2 Latin America
5.5.4.2.1 Application
5.5.4.2.1.1 Latin America Satellite Spectrum Monitoring Market (by End User)

6 MARKETS - COMPETITIVE BENCHMARKING AND COMPANY PROFILES

6.1 Market Share Analysis
6.2 Anritsu Corporation
6.2.1 Company Overview
6.2.1.1 Role of Anritsu Corporation in the Satellite Spectrum Monitoring Market
6.2.1.2 Product Portfolio

6.2.2 Business Strategies
6.2.2.1 New Product Launches and Mergers and Acquisitions
6.2.3 Corporate Strategies
6.2.3.1 Partnerships, Collaborations, Agreements, and Contracts
6.2.4 Analyst View
6.3 Atos
6.3.1 Company Overview
6.3.1.1 Role of Atos in Satellite Spectrum Monitoring Market
6.3.1.2 Product Portfolio
6.3.2 Corporate Strategies
6.3.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.3.3 Analyst View
6.4 Calian Group Ltd.
6.4.1 Company Overview
6.4.1.1 Role of Calian Group Ltd. in Satellite Spectrum Monitoring Market
6.4.1.2 Product Portfolio
6.4.2 Business Strategies
6.4.2.1 New Product Launches
6.4.2.2 Mergers and Acquisitions
6.4.3 Corporate Strategies
6.4.3.1 Partnerships, Collaborations, Agreements, and Contracts
6.4.4 Analyst View
6.5 Clearbox Systems
6.5.1 Company Overview
6.5.1.1 Role of Clearbox Systems in Satellite Spectrum Monitoring Market
6.5.1.2 Service Portfolio
6.5.2 Corporate Strategies
6.5.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.5.3 Analyst View
6.6 CRFS Limited
6.6.1.1 Company Overview
6.6.1.2 Role of CRFS Limited in the Satellite Spectrum Monitoring Market
6.6.1.3 Product Portfolio
6.6.2 Corporate Strategies
6.6.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.6.3 Analyst View
6.7 EXFO Inc.
6.7.1 Company Overview
6.7.1.1 Role of EXFO Inc. in Satellite Spectrum Monitoring Market

6.7.1.2 Product Portfolio
6.7.2 Business Strategies
6.7.2.1 New Product Launches
6.7.3 Corporate Strategies
6.7.3.1 Partnerships, Collaborations, Agreements, and Contracts
6.7.4 Analyst View
6.8 Integrasys S.A.
6.8.1 Company Overview
6.8.1.1 Role of Integrasys S.A. in the Satellite Spectrum Monitoring Market
6.8.1.2 Service Portfolio
6.8.2 Corporate Strategies
6.8.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.8.3 Analyst View
6.9 Keysight Technologies
6.9.1 Company Overview
6.9.1.1 Role of Keysight Technologies in Satellite Spectrum Monitoring Market
6.9.1.2 Product Portfolio
6.9.2 Business Strategies
6.9.2.1 New Product Launches
6.9.3 Corporate Strategies
6.9.3.1 Partnerships, Collaborations, Agreements, and Contracts
6.9.4 Analyst View
6.1 Kratos Defense & Security Solutions, Inc.
6.10.1 Company Overview
6.10.1.1 Role of Kratos Defense & Security Solutions, Inc. in Satellite Spectrum Monitoring Market
6.10.1.2 Product Portfolio
6.10.2 Corporate Strategies
6.10.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.10.3 Analyst View
6.11 Narda Safety Test Solutions
6.11.1 Company Overview
6.11.1.1 Role of Narda Safety Test Solutions in Satellite Spectrum Monitoring Market
6.11.1.2 Product Portfolio
6.11.2 Business Strategies
6.11.2.1 New Product Launches
6.11.3 Analyst View
6.12 National Instruments Corporation
6.12.1 Company Overview

6.12.1.1 Role of National Instruments Corporation in Satellite Spectrum Monitoring Market
6.12.1.2 Product Portfolio
6.12.2 Corporate Strategies
6.12.2.1 Partnerships, Collaborations, Agreements, and Contracts
6.12.3 Analyst View
6.13 Rohde & Schwarz GmbH & Co
6.13.1 Company Overview
6.13.1.1 Role of Rohde & Schwarz GmbH & Co. in Satellite Spectrum Monitoring Market
6.13.1.2 Product Portfolio
6.13.2 Business Strategies
6.13.2.1 New Product Launches
6.13.3 Corporate Strategies
6.13.3.1 Partnerships, Collaborations, Agreements, and Contracts
6.13.4 Analyst View
6.14 ST Engineering iDirect
6.14.1 Company Overview
6.14.1.1 Role of ST Engineering iDirect in the Satellite Spectrum Monitoring Market
6.14.1.2 Product Portfolio
6.14.2 Analyst View
6.15 SatSignature
6.15.1 Company Overview
6.15.1.1 Role of SatSignature in the Satellite Spectrum Monitoring Market
6.15.1.2 Product Portfolio
6.15.2 Business Strategies
6.15.2.1 New Product Launches
6.15.3 Analyst View
6.16 Tektronix
6.16.1 Company Overview
6.16.1.1 Role of Tektronix in the Satellite Spectrum Monitoring Market
6.16.1.2 Product Portfolio
6.16.2 Analyst View
6.17 Other Key Players
6.17.1 Advantech Wireless Technologies
6.17.1.1 Company Overview
6.17.2 Artiza Networks
6.17.2.1 Company Overview
6.17.3 Aviat Networks

6.17.3.1 Company Overview
6.17.4 Cobham
6.17.4.1 Company Overview
6.17.5 FieldSENSE
6.17.5.1 Company Overview
6.17.6 LBA Group
6.17.6.1 Company Overview
6.17.7 Microwave Vision Group
6.17.7.1 Company Overview
6.17.8 Skylink Technology Inc.
6.17.8.1 Company Overview
6.17.9 Unseenlabs
6.17.9.1 Company Overview
6.17.10 LP Technologies
6.17.10.1 Company Overview

7 GROWTH OPPORTUNITIES AND RECOMMENDATION

7.1 Growth Opportunities
7.1.1 Growth Opportunity: Satellite Constellation Deployment
7.1.1.1 Recommendations
7.1.2 Growth Opportunity: Internet of Things (IoT) and 5G Applications
7.1.2.1 Recommendations
7.1.3 Growth Opportunity: Emergence of Cloud-Based Spectrum Monitoring
7.1.3.1 Recommendations

8 RESEARCH METHODOLOGY

8.1 Factors for Data Prediction and Modeling

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List Of Figures

LIST OF FIGURES

Figure 1: Global Satellite Spectrum Monitoring Market, $Billion, 2022-2033
Figure 2: Global Satellite Spectrum Monitoring Market (by End User), $Million, 2022 and 2033
Figure 3: Global Satellite Spectrum Monitoring Market (by Solution), $Million, 2022 and 2033
Figure 4: Global Satellite Spectrum Monitoring Market (by Service), $Million, 2022 and 2033
Figure 5: Global Satellite Spectrum Monitoring Market (by Region), $Million, 2033
Figure 6: Global Satellite Spectrum Monitoring Service Market (by Region), $Million, 2033
Figure 7: Global Satellite Spectrum Monitoring Market Coverage
Figure 8: Global Satellite Spectrum Monitoring Market, Supply Chain Analysis
Figure 9: Global Satellite Spectrum Monitoring Market, Business Dynamics
Figure 10: Share of Key Business Strategies and Developments, January 2020-May 2023
Figure 11: Global Satellite Spectrum Monitoring Market (by End User)
Figure 12: Global Satellite Spectrum Monitoring Market (by Frequency)
Figure 13: Global Satellite Spectrum Monitoring Market (by Solution)
Figure 14: Global Satellite Spectrum Monitoring Market (by Service)
Figure 15: Global Satellite Spectrum Monitoring Market Share Analysis (by Company), 2022
Figure 16: Research Methodology
Figure 17: Top-Down and Bottom-Up Approach
Figure 18: Assumptions and Limitations

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List Of Tables

LIST OF TABLES

Table 1: Partnerships, Collaborations, Agreements and Contracts, January 2020-May 2023
Table 2: Others, January 2020-May 2023
Table 3: Global Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 4: Global Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 5: Global Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 6: Global Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 7: Global Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 8: Global Satellite Spectrum Monitoring Market (by Frequency), $Million, 2022-2033
Table 9: Global Satellite Spectrum Monitoring Market (Antenna, by Frequency), Units, 2022-2033
Table 10: Global Satellite Spectrum Monitoring Market (Spectrum Analyzer, by Frequency), Units, 2022-2033
Table 11: Global Satellite Spectrum Monitoring Market (Receiver, by Frequency), Units, 2022-2033
Table 12: Global Satellite Spectrum Monitoring Market (Direction Finder, by Frequency), Units, 2022-2033
Table 13: Global Satellite Spectrum Monitoring Market (by Frequency), $Million, 2022-2033
Table 14: Global Satellite Spectrum Monitoring Market (by Hardware), $Million, 2022-2033
Table 15: Global Satellite Spectrum Monitoring Market (by Hardware), Units, 2022-2033
Table 16: Global Satellite Spectrum Monitoring Market (by Spectrum Analyzer Type), $Million, 2022-2033
Table 17: Global Satellite Spectrum Monitoring Market (by Spectrum Analyzer Type), Units, 2022-2033
Table 18: Global Satellite Spectrum Monitoring Market (Vector Signal Analyzer, by Form Factor), $Million, 2022-2033
Table 19: Global Satellite Spectrum Monitoring Market (Vector Signal Analyzer, by Form

Factor), Units, 2022-2033
Table 20: Global Satellite Spectrum Monitoring Market (Real-Time Signal Analyzer, by Form Factor), $Million, 2022-2033
Table 21: Global Satellite Spectrum Monitoring Market (Real-Time Signal Analyzer, by Form Factor), Units, 2022-2033
Table 22: Global Satellite Spectrum Monitoring Market (by Service), $Million, 2022-2033
Table 23: Global Satellite Spectrum Monitoring Market (by Region), $Million, 2022-2033
Table 24: Global Satellite Spectrum Monitoring Service Market (by Region), $Million, 2022-2033
Table 25: North America Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 26: North America Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 27: North America Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 28: North America Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 29: North America Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 30: North America Satellite Spectrum Monitoring Market (by Service), $Million, 2022-2033
Table 31: U.S. Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 32: U.S. Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 33: U.S. Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 34: U.S. Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 35: U.S. Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 36: Canada Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 37: Canada Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 38: Canada Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 39: Canada Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 40: Canada Satellite Spectrum Monitoring Market (Direction Finder, by End User),

Units, 2022-2033
Table 41: Europe Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 42: Europe Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 43: Europe Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 44: Europe Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 45: Europe Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 46: Europe Satellite Spectrum Monitoring Market (by Service), $Million, 2022-2033
Table 47: Germany Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 48: Germany Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 49: Germany Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 50: Germany Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 51: Germany Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 52: U.K. Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 53: U.K. Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 54: U.K. Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 55: U.K. Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 56: U.K. Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 57: France Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 58: France Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 59: France Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 60: France Satellite Spectrum Monitoring Market (Receiver, by End User), Units,

2022-2033
Table 61: France Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 62: Rest-of-Europe Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 63: Rest-of-Europe Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 64: Rest-of-Europe Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 65: Rest-of-Europe Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 66: Rest-of-Europe Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 67: Asia-Pacific Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 68: Asia-Pacific Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 69: Asia-Pacific Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 70: Asia-Pacific Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 71: Asia-Pacific Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 72: Asia-Pacific Satellite Spectrum Monitoring Market (by Service), $Million, 2022-2033
Table 73: China Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 74: China Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 75: China Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 76: China Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 77: China Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 78: Japan Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 79: Japan Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033

Table 80: Japan Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 81: Japan Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 82: Japan Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 83: India Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 84: India Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 85: India Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 86: India Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 87: India Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 88: Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 89: Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 90: Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 91: Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 92: Rest-of-Asia-Pacific Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 93: Rest-of-the-World Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 94: Rest-of-the-World Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 95: Rest-of-the-World Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 96: Rest-of-the-World Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 97: Rest-of-the-World Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 98: Rest-of-the-World Satellite Spectrum Monitoring Market (by Service), $Million, 2022-2033
Table 99: Middle East and Africa Satellite Spectrum Monitoring Market (by End User),

$Million, 2022-2033
Table 100: Middle East and Africa Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 101: Middle East and Africa Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 102: Middle East and Africa Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 103: Middle East and Africa Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 104: Latin America Satellite Spectrum Monitoring Market (by End User), $Million, 2022-2033
Table 105: Latin America Satellite Spectrum Monitoring Market (Antenna, by End User), Units, 2022-2033
Table 106: Latin America Satellite Spectrum Monitoring Market (Spectrum Analyzer, by End User), Units, 2022-2033
Table 107: Latin America Satellite Spectrum Monitoring Market (Receiver, by End User), Units, 2022-2033
Table 108: Latin America Satellite Spectrum Monitoring Market (Direction Finder, by End User), Units, 2022-2033
Table 109: Anritsu Corporation: Product Portfolio
Table 110: Anritsu Corporation: New Product Launches and Mergers and Acquisitions
Table 111: Anritsu Corporation: Partnerships, Collaborations, Agreements, and Contracts
Table 112: Atos: Product Portfolio
Table 113: Atos: Partnerships, Collaborations, Agreements, and Contracts
Table 114: Calian Group Ltd.: Product Portfolio
Table 115: Calian Group Ltd.: New Product Launches
Table 116: Calian Group Ltd.: Mergers and Acquisitions
Table 117: Calian Group Ltd.: Partnerships, Collaborations, Agreements, and Contracts
Table 118: Clearbox Systems: Product Portfolio
Table 119: Clearbox Systems: Partnerships, Collaborations, Agreements, and Contracts
Table 120: CRFS Limited: Product Portfolio
Table 121: CRFS Limited: Partnerships, Collaborations, Agreements, and Contracts
Table 122: EXFO Inc.: Product Portfolio
Table 123: EXFO Inc.: New Product Launches
Table 124: EXFO Inc.: Partnerships, Collaborations, Agreements, and Contracts
Table 125: Integrasys S.A.: Product Portfolio
Table 126: Integrasys S.A.: Partnerships, Collaborations, Agreements, and Contracts
Table 127: Keysight Technologies: Product Portfolio

Table 128: Keysight Technologies: New Product Launches
Table 129: Keysight Technologies: Partnerships, Collaborations, Agreements, and Contracts
Table 130: Kratos Defense & Security Solutions, Inc.: Product Portfolio
Table 131: Kratos Defense & Security Solutions, Inc.: Partnerships, Collaborations, Agreements, and Contracts
Table 132: Narda Safety Test Solutions: Product Portfolio
Table 133: Narda Safety Test Solutions: New Product Launches
Table 134: National Instruments Corporation: Product Portfolio
Table 135: National Instruments Corporation: Partnerships, Collaborations, Agreements, and Contracts
Table 136: Rohde & Schwarz GmbH & Co.: Product Portfolio
Table 137: Rohde & Schwarz GmbH & Co.: New Product Launches
Table 138: Rohde & Schwarz GmbH & Co.: Partnerships, Collaborations, Agreements, and Contracts
Table 139: ST Engineering iDirect: Product Portfolio
Table 140: SatSignature: Product Portfolio
Table 141: SatSignature: New Product Launches
Table 142: Tektronix: Product Portfolio

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