

Who Controls the Access Layer?

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Abstracts

LEO constellations and Non-Terrestrial Networks (NTN) are not just adding new connectivity. They are reshaping control within hybrid terrestrial + satellite architectures.

Between 2026 and 2030, NTN is unlikely to materially increase total telecom capex in mature markets. Instead, it will redistribute value—away from marginal access expansion and toward integration, orchestration, and policy control layers.

The strategic issue for equipment vendors is therefore not market growth, but control.

Long-term relevance will depend on who governs hybrid coordination across fibre, FWA, and NTN domains. This report evaluates how value pools shift, where leverage concentrates, and which positioning choices secure durable influence.

Key questions:

Does NTN expand vendor growth, or mainly redistribute existing value?

Where does control concentrate within hybrid access architectures?

Which vendor domains face margin pressure, and which gain leverage?

How do vertically integrated satellite platforms and hyperscalers affect vendor influence?

What strategic positioning options preserve long-term architectural relevance?

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