



2019 PROGRAM

Monday, September 09, 2019

08:00 Registration & welcome coffee hosted by



09:00 Opening remarks

Lorraine Whitfield, Chief Events & Marketing Officer, Euroconsult

09:15 WSBW opening presentation – Matrix reloaded: The new dawn of satellite connectivity

Pacôme Révillon, CEO, Euroconsult

09:30 **Outlook for the satellite sector: The investment perspective**

Investment decisions in the satellite sector are becoming increasingly complex in a rapidly evolving market environment. This session will address the following topics:

- > Which markets are overlooked or overhyped?
- > Key fundamentals for a successful business case
- > The prospects for smallsats and constellations versus traditional GEO business
- > Current and expected M&A trends
- > Longer-term outlook for space investment

Moderator: Peter Nesgos, Partner, Milbank

Tom Fitzpatrick, CFO, Iridium

Tom Whayne, CFO, OneWeb

Virginie Gode, Director, Export & Asset Finance, Global Banking, HSBC

Wim N. Steenbakkers, Managing Director, Global Head Satellite & Technology Finance, ING Bank N.V.

Fred J. Turpin, Global Head of Media & Communications IB, JP Morgan Chase & Co.

Jon Yourkoski, Managing Director, Investment Banking Division, Morgan Stanley

10:30 Morning coffee break hosted by



11:00 **Finspace startup pitches**

11:20 Regional operators: Exploring new paths to growth

In an increasingly competitive environment, regional satellite operators must explore and seize new market opportunities. This session will explore new paths for regional operators to overcome current industry challenges and strengthen their competitive positioning:

- > Possible differentiation strategies in regional markets
- > New business models and business case economics for satellite operators
- > The future operational and economic model of satellite operators
- > Competitive positioning of regional operators to capture new market opportunities in mobility, broadband access, and cloud services
- > New satellite investments: Flex satellites versus Very High Throughput Satellites

Moderator: Stéphane Chenard, Senior Associate Consultant, Euroconsult
Masood M. Sharif Mahmood, CEO, Yahsat
Roger Tong, CEO, AsiaSat
Dr. Won-sic Hahn, CEO, KT Sat
Yau Chyong Lim, COO, MEASAT Satellite Systems Sdn Bhd
Baozhong Huang, Executive Vice President, APT Satellite

12:15 Official lunch hosted by



14:15 CEOs of leading operators – Enhancing the satellite’s value proposition supported by



Guidance on strategic issues for the industry: How do operators intend to transform their business models? The CEOs of leading satellite operators will address this question, with topics such as:

- > Operators' future operational and economic models
- > How to turn the appetite for data into a much larger opportunity for the value chain
- > Optimizing the video business and the related value proposition
- > Expected ecosystem adaptations to the “5G” environment

Moderator: Pacôme Révillon, CEO, Euroconsult
Steve Collar, CEO, SES
Rodolphe Belmer, CEO, Eutelsat
Steve Spengler, CEO, Intelsat
Mark Dankberg, Chairman & CEO, Viasat Inc.
Daniel Goldberg, President & CEO, Telesat

15:45 Afternoon coffee break hosted by



16:15 Airlines' path to next gen IFC

Executives from international airlines will discuss their return on experience on IFC and share their views on ways to develop and their expectations for the next generation of connectivity onboard their fleets.

Moderator: David Bruner, CEO, Aviation Communications Advisors

Vy Duong, Innovation and Revenue Generation Marketing, American Airlines

Charles Hageman, Customer Journey Manager, KLM

Quentin Couturier, Senior Manager BFE & Contracts, Etihad Airways

17:00 Shifting strategies: Increasing the value proposition through flexible services

IFC service providers will share the challenges and strategies necessary to meet the evolving airline connectivity trends. As in-flight connectivity business models are rapidly changing, service providers are developing new flexible offerings to accommodate customers' requirements.

Moderator: Susan Irwin, Affiliate Principal Advisor, Euroconsult

Todd Hill, Senior Director, Global Satellite Capacity Planning, Panasonic Avionics Corporation

Dave Elliott, Managing Director, Viasat Ireland

Matt Petzold, CFO, SmartSky Networks

Gustavo Nader, Head of Strategy, IFEC, Thales InFlyt Experience

18:00 Official cocktail reception

Tuesday, September 10, 2019

08:00 Welcome coffee hosted by



09:00 Universal Access: Your taxes at work

Satellite systems are being planned and launched around the world to help carriers and governments meet their universal telecom service obligations.

- > What are the business models? Can those systems make money?
- > Is the definition of universal access to communications/broadband changing?
- > Are satellites up to bringing broadband to the large numbers of the poorest and most remote users?
- > Are the universal service funds ready to tango?

Moderator: David Marshack, Managing Director & COO, RKF Engineering
Joseph Abakunda, Ag. Director, Rwanda National Space Office
Renato Goodfellow, Head of Global Satellite, BT Global Services
Fernando Ojeda, CEO, Eureka
Andrew Walwyn, CEO, Big Blu Broadband
Bing Kung, Extra-Terrestrial Product Manager, Facebook

10:00 Morning coffee break hosted by



10:30 Beyond the horizon: Satcom services for safety and security in Europe

Reliable and secure communications have been identified by European government stakeholders as major commercial opportunities and strategic assets to meet European safety and security challenges. Representatives from key European public and private organizations will discuss scenarios, benefits and challenges for the development of a sustainable European GOVSATCOM infrastructure.

Moderator: David Chégnion, Managing Director, Satconsult
Magali Vaissière, Director of Telecommunications and Integrated Applications, ESA
Evert Dudok, EVP, Communications, Intelligence and Security, Airbus Defence and Space
Michel Margery, Policy Officer & Administrator, European Commission
Jean-Marc Gardin, Deputy CEO, Telespazio Group, Space Alliance

11:20 Finspace startup pitch

11:30 Bringing connectivity services and much more

How are end-user services transitioning with a shifting capacity pricing environment and evolving value chain? Session topics will include:

- > Expanding end-user requirements and the innovation needed to meet them
- > The satellite capacity landscape: Today and in the future
- > Changing competitive dynamics including M&A, business model changes, etc.
- > Expectations for demand drivers moving forward, and how to capitalize on them

Moderator: Blaine Curcio, Senior Affiliate Consultant, Euroconsult

Pierre-Jean Beylier, CEO, Speedcast

Pradman P. Kaul, President & CEO, Hughes Network Systems

Kevin Steen, CEO, iDirect

Alessandro Caranci, Senior Vice President Satellite Communications, Telespazio

12:30 Official lunch hosted by

The logo for Airbus, consisting of the word "AIRBUS" in a bold, blue, sans-serif font.

14:15 Smart transport: Key steps along the way

All modes of transport have begun their transition to a connected environment. Services to passengers onboard, operational and critical information streams to and from vehicles, all have different levels of maturity and roadmaps. Executives from the automobile, maritime and aero industries will share their views on the current development stage of connectivity and on what they consider as future critical milestones for their respective organizations.

Moderator: Pacôme Révillon, CEO, Euroconsult

Daniele Cohen, VP, Digital Partnerships & Connected Car Services Innovation, Groupe PSA

Reza Rasoulian, VP of Broadband Satellite Services, Hughes Network Systems

14:50 Finspace startup pitch

15:00 **NGSO broadband constellations: The critical path to success**

NGSO broadband constellations are on a critical path to become fully funded and operational. As the new competitive landscape will be defined over the next 2-3 years, the leaders of key constellations will discuss the following:

- > Key milestones for the next 12 months
- > Technical, financial and regulatory hurdles to overcome
- > The importance of the first-mover advantage
- > Price elasticity and the potential of unlocking new markets

Moderator: Nathan de Ruiter, Managing Director, Euroconsult Canada
John-Paul Hemingway, CEO, SES Networks
Adrian Steckel, CEO, OneWeb
Erwin Hudson, VP Telesat LEO, Telesat
Mark Rigolle, CEO, LeoSat

16:00 Afternoon coffee break hosted by



16:30 **Large launch systems adapting to a changing market landscape**

The heads of competing large launchers will discuss key market evolutions impacting their strategies, including:

- > Benefits of cooperation with clients, both governmental and commercial, to improve the user experience
- > Technology and business uncertainties in most segments of the commercial market (comsat, smallsat, constellations, IOS, etc.)
- > Market differentiators beyond launch price (time to orbit/in-orbit, satellite stacking, etc.)

Moderator: Rachel Villain, Principal Advisor, Euroconsult
Gwynne Shotwell, President & COO, SpaceX
Stéphane Israël, Chairman & CEO, Arianespace
John Elbon, COO, ULA
Clay Mowry, VP, Global Sales, Marketing & Customer Experience, Blue Origin
Kirk Pysher, President, ILS
Xing He, Executive Vice President, China Great Wall Industry Corporation
Ko Ogasawara, Vice President & General Manager, Space Systems, MHI

18:00 Official cocktail reception hosted by



Wednesday, September 11, 2019

08:00 Welcome coffee hosted by



08:45 **Satellite manufacturers: The day after tomorrow**

Leaders of the world's prime satellite manufacturers will discuss their business perspectives at a time when the satellite industry is completing a major transformation cycle.

- > What are the new market paradigms?
- > What are the lessons learnt from a changing landscape?
- > How are strategies adapting to new opportunities?

Moderator: Steve Boehinger, COO, Euroconsult

Jean-Marc Nasr, EVP, Head of Space Systems, Airbus Defence and Space

Chris Johnson, President, Boeing Satellite Systems International

Jean-Loïc Galle, President & CEO, Thales Alenia Space

Dan Jablonsky, President & CEO, Maxar

Frank DeMauro, Vice President and General Manager, Space Systems Division, Northrop Grumman

Guy Beutelschies, VP Communication, Satellite Solutions, Lockheed Martin Space

10:15 **Finspace startup pitch**

10:30 Morning coffee break hosted by



11:00 Smallsats, more launch options for shorter time to orbit

Smallsat operators now have access to a growing multitude of solutions for access to space. Each launch provider is adopting innovative commercial strategies to address the specific requirements of the smallsat community. The session will discuss topics such as:

- > How to differentiate in an increasingly competitive landscape
- > Evolving business models in a changing ecosystem
- > How to leverage new markets

Moderator: Maxime Puteaux, Senior Consultant, Euroconsult
Tim Ellis, Co-Founder and CEO, Relativity
Dan Hart, President & CEO, Virgin Orbit
Marino Fragnito, Vice President, Vega Program, Arianespace
Alexander Serkin, CEO, GK Launch

11:45 What is the equation for investing in space businesses?

As for any industry going through a disruptive innovation period, the space economy presents the opportunity for new value creation as well as higher technical and business risks. Executives from VC funds and other investment groups will discuss how to make investment decisions with millions on the line:

- > How do investors think about market segmentation and which segments are most attractive?
- > Why space and what tradeoffs are made for space investment?
- > How does capital raising for organic growth compare to M&A?
- > How to close the business case?

Moderator: Sima Fishman, Managing Director, Euroconsult USA
Mark Boggett, CEO, Seraphim Capital
Mike Collett, Founder & Managing Partner, Promus Ventures

12:15 Official lunch hosted by

Relativity

Satcom awards ceremony

14:15 IoT constellations: Emerging business models

Key trends and strategic issues for space based IoT connectivity providers will be discussed; how will emerging business models impact the industry?

- > How will the “satellite as a service” model impact the IoT landscape?
- > What is the role of partnerships with established players in a highly competitive environment?
- > Go-to-market plan and target markets
- > Access to space and time to market: The first-mover advantage?

Moderator: Nathan de Ruiter, Managing Director, Euroconsult Canada
Emma Park, Vice President Europe, Sigfox
Fabien Jordan, Founder & CEO, Astrocast
Mina Mitry, Co-Founder & CEO, Kepler Communications
David Haley, CTO & Co-Founder, Myriota

15:15 Afternoon coffee break hosted by



15:45 The rapidly evolving video landscape

The traditional positioning of satellite in the video distribution value chain is increasingly challenged. What role will it play in the new ecosystem? The session will address this question, with topics such as:

- > How can satellite players efficiently combine linear and non-linear TV?
- > How to leverage new OTT and UHD opportunities for satellite companies?
- > What are the prospects for video distribution by satellite in a rapidly changing ecosystem?
- > Are there new opportunities in advanced digital markets or mainly in emerging markets?

Moderator: Susan Irwin, Affiliate Principal Advisor, Euroconsult
Bill Tillson, Executive Chairman, Encompass
Philippe Bernard, Chairman & CEO, Globecast
Alex Pannell, Managing Director: Satellite & Media, Arqiva
James Crossland, Senior Vice President International Operations, WarnerMedia

Thursday, September 12, 2019



SYMPOSIUM ON INNOVATION

(optional morning)

08:00 Welcome coffee

09:15 **Euroconsult market presentation: The roadmap for satellite business capabilities**

Brent Prokosh, Senior Affiliate Consultant, Euroconsult

09:30 **Satellite operators: Technological innovation propels business innovation**

Representatives from global and regional satellite operators will discuss the critical nature of technology for business innovation:

- > Complementarity and competition between geostationary satellites and constellations
- > Benefit of experience on the introduction of new technologies such as HTS, electric propulsion, software-defined payloads
- > Rationale for design-to-cost purchase practices within the satellite industry

Moderator: Michele Franci, Senior satellite telecommunications system expert,

Stewart Sanders, EVP Technology / O3b mPOWER Program Lead, SES Networks

Paul Gaske, EVP & General Manager, Hughes North America, Hughes Network Systems

Arlen Kassighian, US satellites programme Director, Technical Department, Eutelsat

10:30 Morning coffee break

11:00 **Anticipating the unexpected – Satellite manufacturers' solutions to address new market needs**

The representatives from established satellite manufacturers will discuss strategic issues for their business, especially how they plan to address demand's evolution and market cycle:

- > Market adoption of reprogrammable payloads and standardized flexible small GEO
- > The cycle of GEO comsat orders and constellations' deployment
- > Satellite operators' needs for cost efficiency and flexibility
- > The road ahead: New opportunities

Moderator: Maxime Puteaux, Senior Consultant, Euroconsult

Pierre François Delval, Head of Innovation, Advanced projects and Proposals, Telecommunication Satellites, Airbus Defence and Space

Raenaud Turpin, Chief Engineer, Boeing Commercial Satellites and Common Products, Boeing

Didier Le Boulc'h, VP Telecom Strategy and Solutions, Thales Alenia Space

Joe Landon, VP, Advanced Programs Development, Lockheed Martin Space

11:45 **Satellite end-users demand services; how will the industry respond?**

The satellite and ground segment industry is evolving its product portfolio to address new users and new requirements:

- > What are the challenges for the satcom industry with such changes?
- > How will the industry create a new ecosystem to democratize satellite products and services?
- > What is its strategy to develop new market channels for satellite services?

Moderator: Santiago Perez, Senior Consultant, Euroconsult

Tom Choi, Chairman, Airspace IX

Alexandre Tisserant, CEO, Kinéis

Barry A. Matsumori, CEO, BridgeComm

12:30 Lunch