



4th edition

Satellite direct-to-device market

September 2023



About this report

This report describes the satellite direct-to-device (D2D) market, investigates drivers and restraints, and details key use cases.

It also provides recommendations for satellite operators, mobile network operators (MNOs) and equipment/infrastructure vendors.

It is based on several sources:

- internal research that combines NSR's in-depth satellite industry knowledge and Analysys Mason's understanding of telecoms, media and technology (TMT) market trends
- interviews with stakeholders in the satellite D2D market and secondary research tracking industry announcements.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What is the **revenue opportunity** for the emerging satellite D2D market?
- What **use cases** can MNOs target beyond their terrestrial coverage leveraging satellite D2D technology?
- What are the limitations and strengths of satellite D2D technology?
- What are the key technology developments that will shape the future of the market and how should players respond to this evolution?
- Who are the main players and what are the different strategies (spectrum, supply and capabilities, standards, business models, etc.)?



GEOGRAPHICAL COVERAGE

- North America (NAM)
- Latin America (LAM)
- Europe (EU)
- Middle East/Africa (MEA)
- Asia



WHO SHOULD READ THIS REPORT

- Satellite operators to understand the revenue potential, traffic forecasts, and key drivers and constraints.
- MNOs and CSPs to learn the potential of satellite D2D as the new source of growth and differentiation.
- Chipset and parts vendors, OEMs and infrastructure vendors (space and terrestrial) to assess the key strategic choices (spectrum, standards, business models) to best serve the ecosystem.
- Regulators and industry agencies to determine the opportunities offered by D2D to foster innovation and bridge the digital divide.



Contents



Executive summary

Research overview

D2D as a new source of differentiation and growth for MNOs





How MNOs can prepare for the fast pace of change in the industry

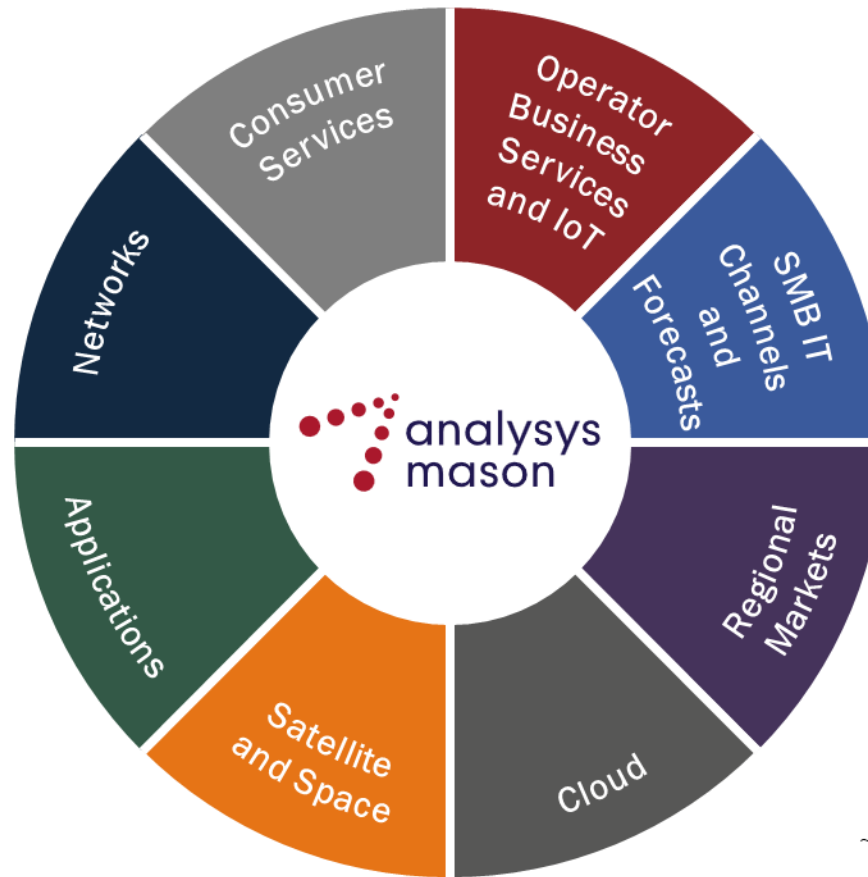
Aligning the value chain

Appendix

About the authors and Analysys Mason

Our research services

- 
Consumer Services
 Fixed Broadband Services
 Mobile Services
 Fixed-Mobile Convergence
 Smart Devices
 Future Comms
 Video, Gaming and Entertainment
- 
Networks
 Next-Generation Wireless Networks
 Wireless Infrastructure Strategies
 Fibre Infrastructure Strategies
 Operator Investment Strategies
 Telecoms Strategy and Forecast
 Transport Network Strategies
- 
Applications
 Network Automation and Orchestration
 Customer Engagement
 Monetisation Platforms
 Digital Experience
 Automated Assurance
 Service Design and Orchestration
 Telecoms Software Market Shares
- 
Satellite and Space
 Satellite Communications
 Space Applications and Infrastructure



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



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