Satellite and NTN Summit

Presented by GSMA Intelligence

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Intelligence

Every mobile operator. Every network. Every spectrum assignment.

Backed by the GSMA, GSMA Intelligence provides a 360° intelligence platform delivering insights, forecasts and research across IoT, 5G, Open RAN, NTN, AI and the wider telecoms ecosystem.

2026 research themes

Tech transformation	Service innovation and monetisation	Mobile impact
Telco networks	Digital industries and B2B	Industry value
AI	eSIM and IoT	Digital economy
Emerging technologies	Consumer devices and services	Spectrum
Security	Digital home	Sustainability

Data and analytics

- 50M+ data points, 4,500 networks, 2,000–2030 forecasts
- Operator & market benchmarks, technology tracking
- Verified global data across mobile, fixed, IoT & devices

Research and insights

- 200+ annual reports across 17 telecom & digital topics
- Quarterly market reviews and technology deep dives
- Expert analysis on 5G, IoT, AI, devices, convergence & more

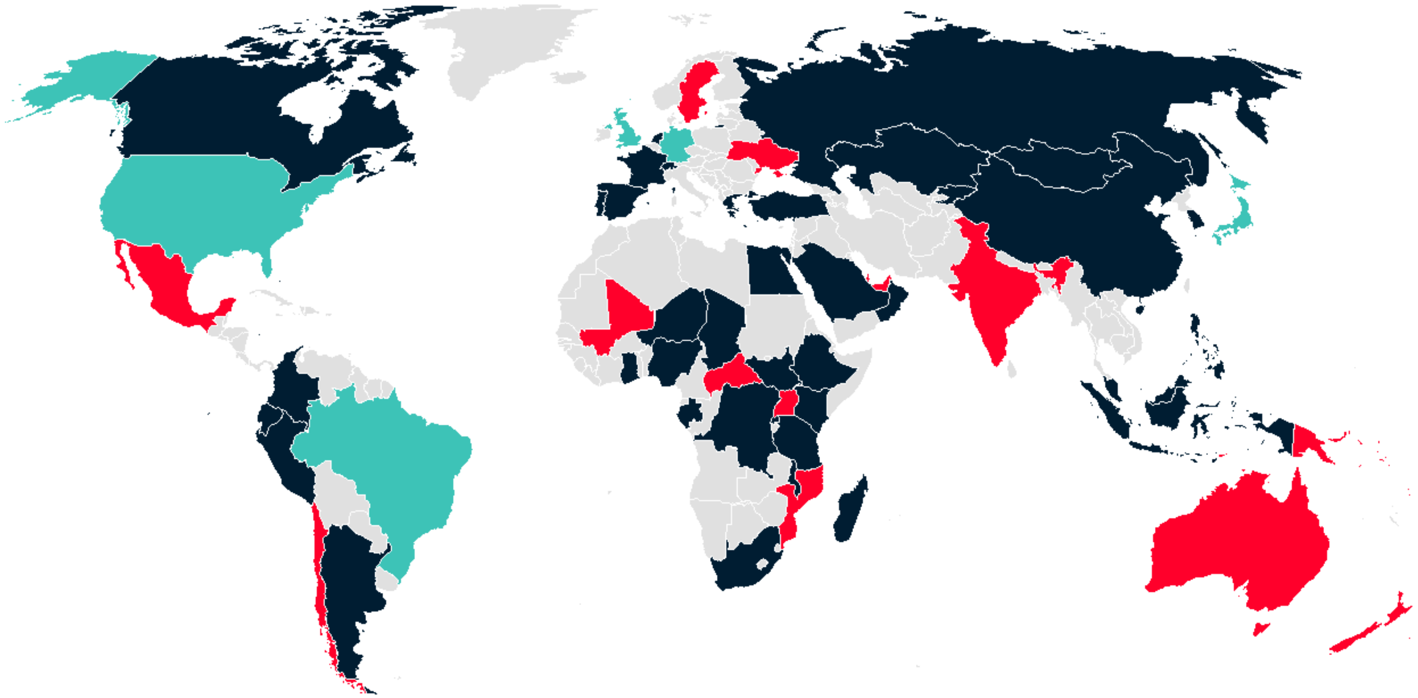
Consulting and events

- Custom research, strategy projects & market assessments
- Sponsored reports and thought-leadership programmes
- MWC event support (content, insights, briefings)

Tools

- Spectrum Navigator & Network Sunsets dashboards
- Coverage maps
- Premium data suite

Global view of telco-satellite coverage



- Satellite connectivity not yet launched but either planned or in testing phase
- Satellite connectivity launched by one operator
- Satellite connectivity launched by two or more operators

Note Some countries may not be shaded but still have operators with satellite partnerships that have not been publicly disclosed.
Data correct to December 2025.
Source: GSMA Intelligence

Global view of telco-satellite coverage 2026 = **go time for commercialisation**

Global view of telco-satellite coverage

Metric	December 2025	Change (last three months)
Operators with satellite service*	118	+8
Of which are live	33	+5
Of which are planned or testing	85	+3
Mobile connections footprint (million)	6,141	-
Share of total connections base covered by satellites and NTNs	70%	+3ppts

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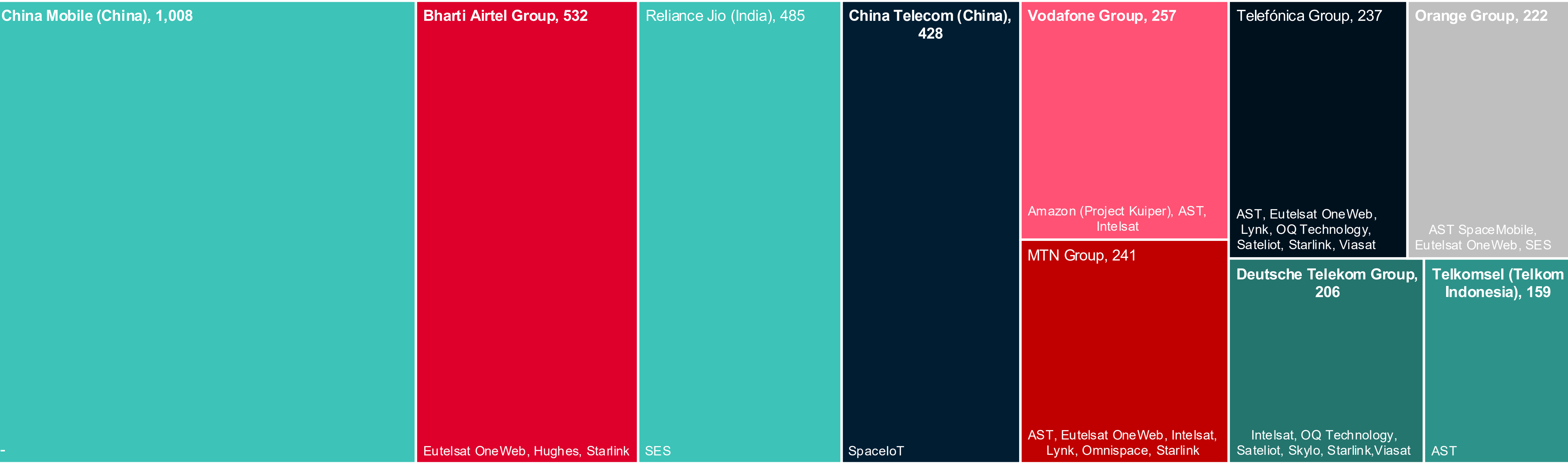
Data correct to December 2025.
Source: GSMA Intelligence

A varied set of **partnerships**



Note: The number of mobile subscribers for each operator or group represents the addressable footprint for a partnership, assuming national satellite coverage.
Data correct to December 2025
Source: GSMA Intelligence

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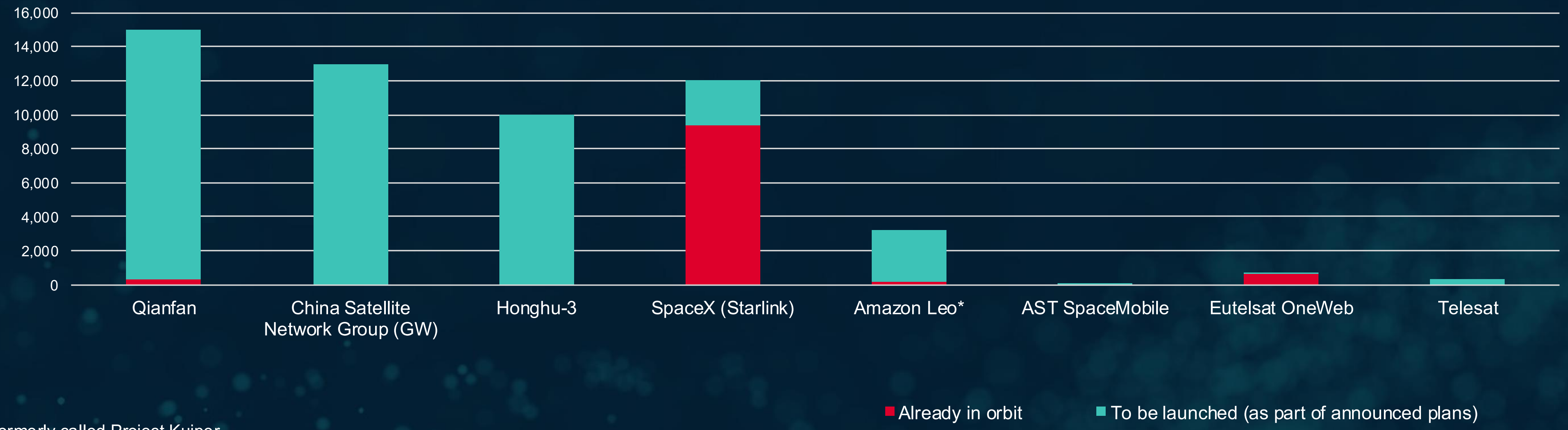
Competitive landscape: Starlink 1st mover…but it’s a long game

China + global top 5
Number of satellites



*Formerly called Project Kuiper
Data correct to December 2025
Source: GSMA Intelligence

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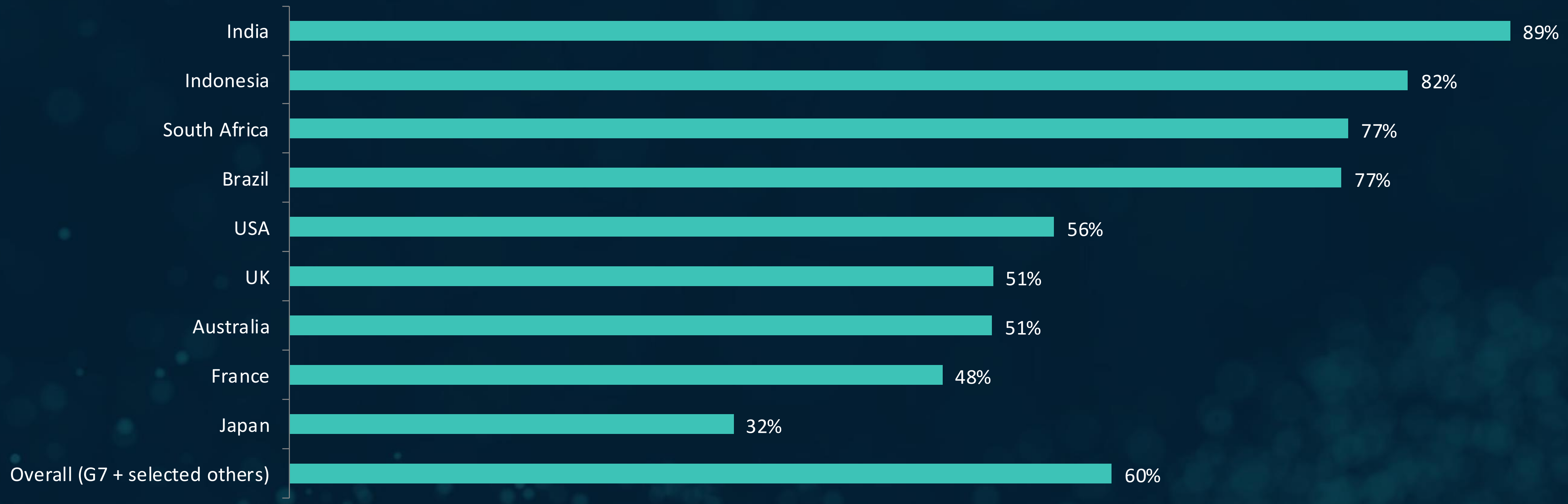
D2D go-to-market: to price or not to price?

60% of people say they would pay for satellite…on top of their existing monthly spend



Note: countries with a missing bar for 2024 were not included in the survey that year
Source: GSMA Intelligence and Viasat survey on satellite consumer attitudes (May/June 2025)

Market pricing (so far) implies a 15-25% uplift for satellite

Telco pricing for D2D in cellular tariffs (selected examples)

Operator	Satellite partner	Service launch date	Service	Base contract tariff ($ per month)	Satellite bolt-on ($/month)	Contract ARPU ($/month)	Effective satellite uplift (percentage of contract ARPU)
Rogers, Canada	Starlink	July 2025 (trial)	SMS	$73/ $51	0/ $10.95	$58	0%/ 19%
T-Mobile, US	Starlink	July 2025	SMS	$105/ $50	0/ $10	49	0%/ 31%
Entel, Chile	Starlink	May 2025	SMS	$13.72	-	11.70	0%
Verizon, US	Skylo	January 2025	SMS	-	0	45	0%
One NZ, New Zealand	Starlink	December 2024	SMS	29	0	24	0%
SmarTone, Hong Kong	Tiantong-1 satellite system	August 2024	Voice/SMS	-	$3.60	28	13%
3 (CK Hutchison), Hong Kong	Tiantong-1 satellite system	July 2024	Voice/SMS	-	$2.45	25	10%

Source: GSMA Intelligence, company websites

There is also an allure of **convergence**

Portfolio. D2D may garner the headlines, but it's not the only game in town when it comes to the satellite portfolio

Bundling strategies

- D2D cross sell to broadband and/or IoT
- Vice versa
- Some other combination

Benefits. Why? In theory…

- Higher bundle value
- Lower churn

Limitations. In practice, watch for…

- Capacity constraints
- Competition

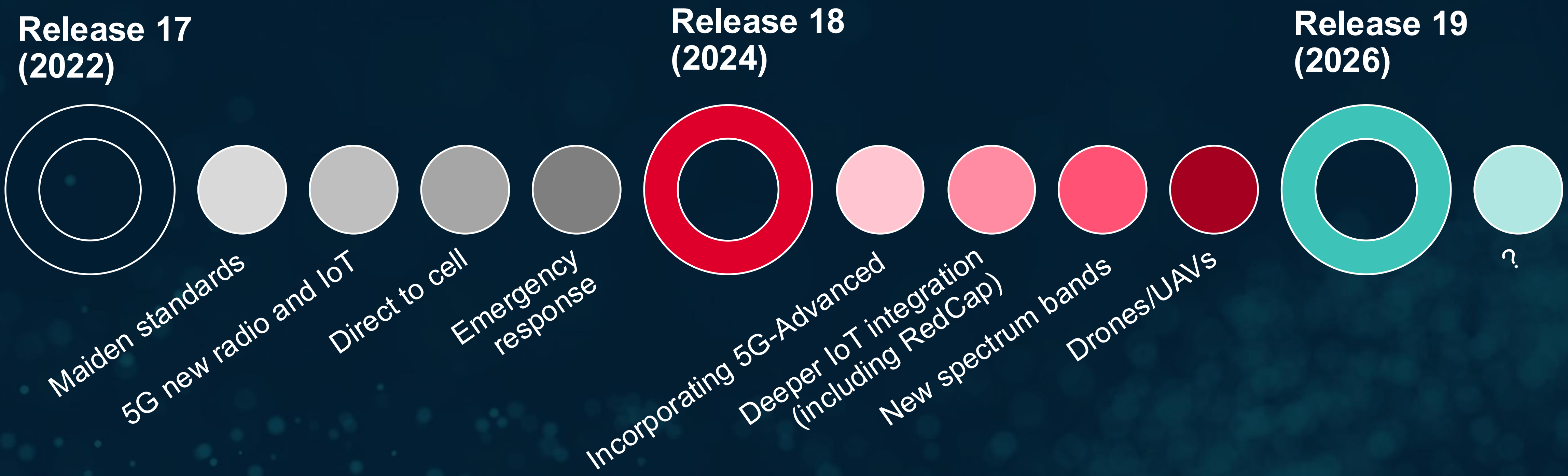
Product offerings among major satellite companies

Satellite provider	Home broadband	Backhaul	Direct to device	IoT	Telco partnerships (live)*	Telco partnerships (planned)*
Starlink	Available	Available	Available	Available	6	14
AST Space Mobile	Not offered	Not offered	Available	Not offered	0	30
Lynk	Not offered	Available	Available	Not offered	3	23
Kuiper	Planned	?	?	?	0	3
Eutelsat/OneWeb	Available	Planned	Available	Available	3	8
Viasat/Inmarsat	Available	Available	Planned	Available	2	2
Skylo	Not offered	Not offered	Available	Available	2	3
Echostar	Available	Available	Planned	Available	0	0

Source: GSMA Intelligence

IoT ready for prime time?

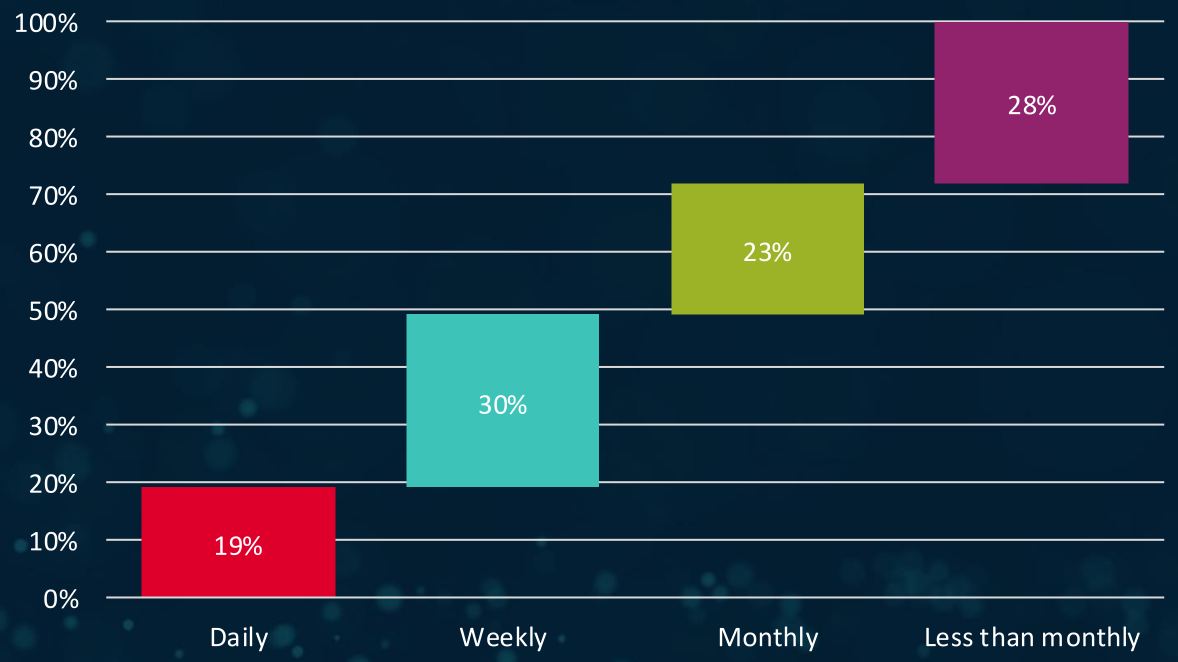
Satellite capabilities get better with each standards release



Source: GSMA Intelligence, 3GPP

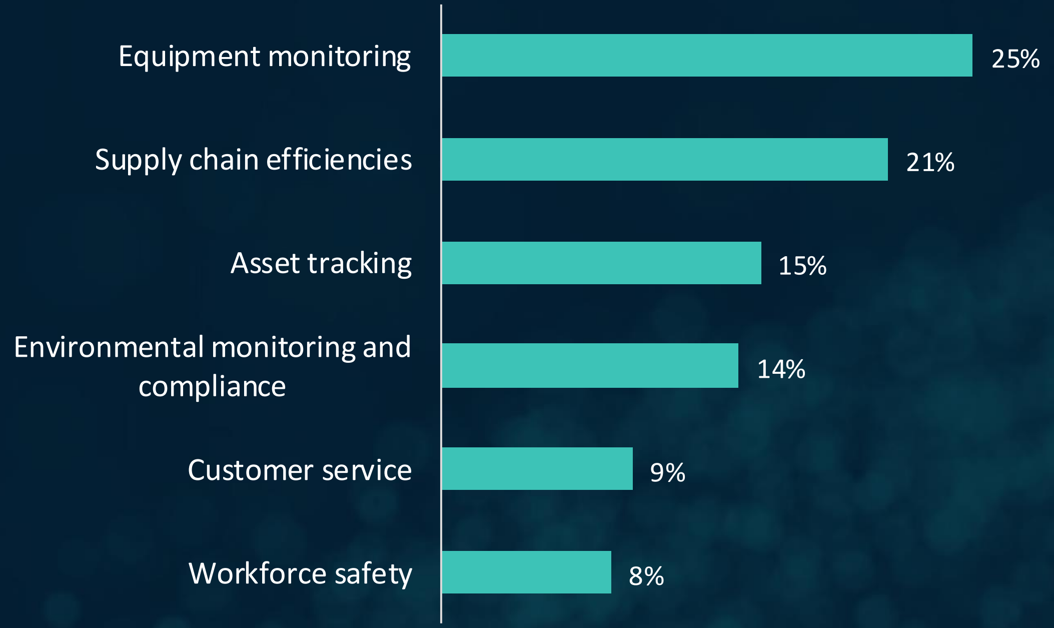
Satellites may be fancy, but this is about solving basic problems

How often do businesses have critical operations delayed by lack of timely data?



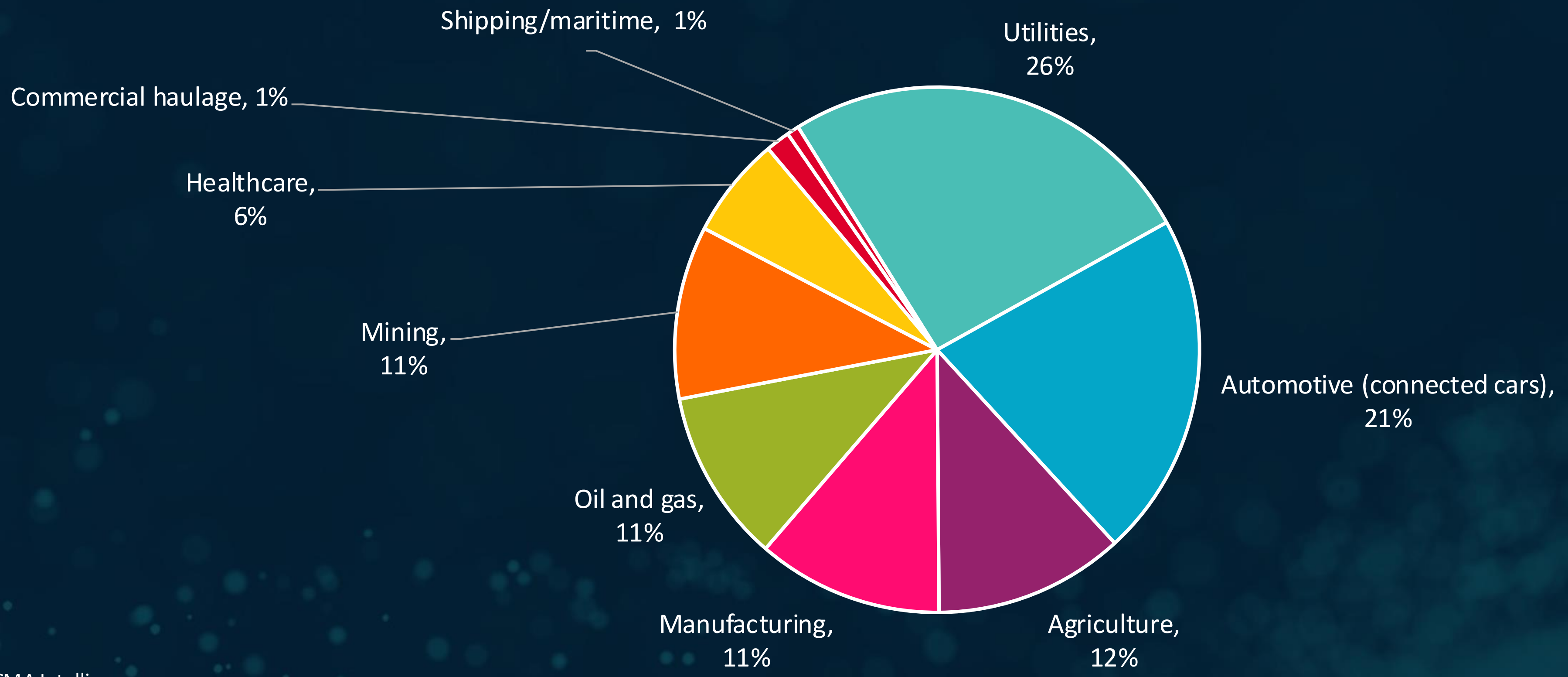
Source: GSMA Intelligence and Skylo survey of satellite enterprise attitudes (2025)

Where could satellite MOST help?



IoT universe = **2.5bn devices**

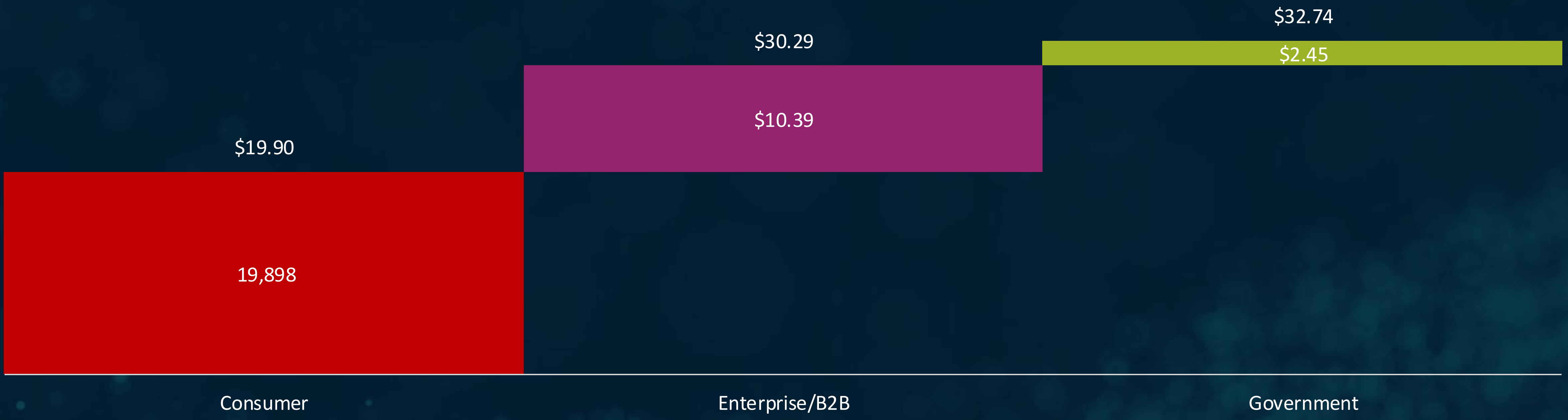
2-2.5bn IoT devices sit within the satellite addressable base



Source: GSMA Intelligence

All tolled, $30-35bn is in play = **2-3% of the telco topline**

Addressable telco revenues via wholesale satellite partnerships ($ billion/year, 2035)



Source: GSMA Intelligence

So, space is (still) getting more crowded…

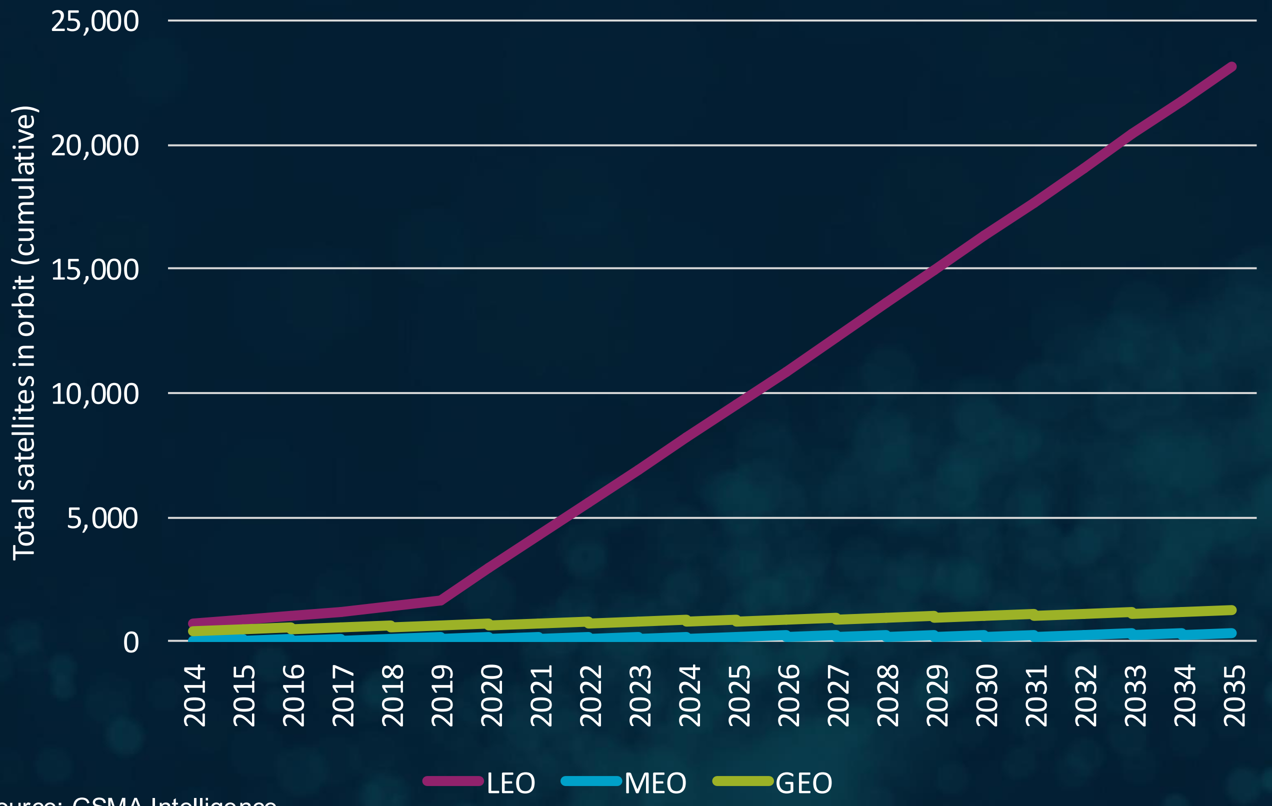
Huge momentum

- LEO constellation explosion. Total satellites in orbit will be 10x pre 2020 levels by end of decade
- Driven by improved satellite economics and performance
- Telco demand growing

Multiple target segments

- Consumer = unconnected, roaming, emergency service
- IoT/industrial sell in coming into frame across several industries
- Emergency + disaster response

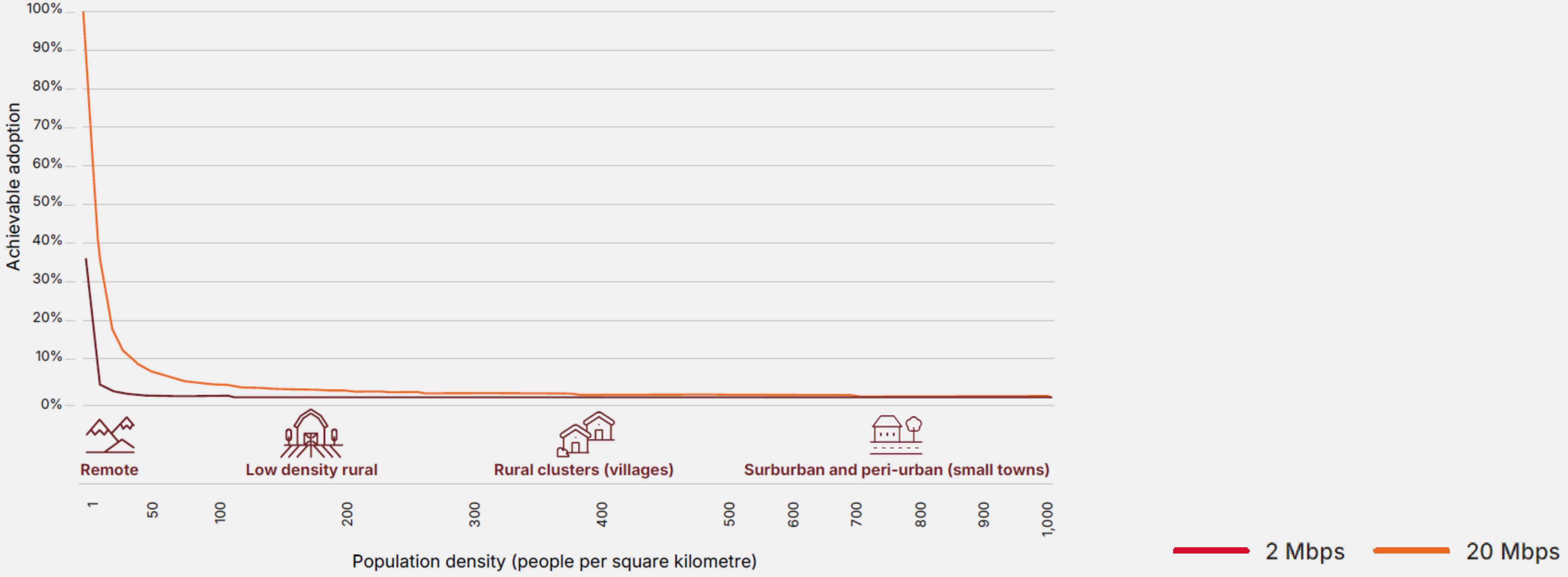
Satellite is exploding, driven by LEO volumes



Source: GSMA Intelligence

…there are, however, fundamental capacity limitations

Even a scaled D2D constellation at LEO is likely to be most effective in rural areas, with urban use quickly running into spectrum limitations



Source: GSMA Intelligence

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Consolidation on/off will be an indicator of sustainable demand

Satellite consolidation isn't new, but is gaining pace

Examples shown are a selection and not exhaustive
Source: GSMA Intelligence

Overall outlook. Big questions? It's why we're here!

Technology

- **Network performance:** does it get beyond '3G-like?'
- **Satellite longevity:** does this lengthen? How long?
- **D2D:** real deal?
- **Chipsets and handsets:** how quickly is NTN integrated? How fast can people tap in?

Commercial

- **Integration costs + set up:** how can telcos minimize opex/capex vis-à-vis NTN integration?
- **Willingness to pay**: will people pay more for satellite…and by how much?
- **Proving the revenue story:** to what extent do these show up? Do operators disclose the NTN impact?

Regulatory

- **Spectrum:** interference mitigations? Borrowing terrestrial? MSS?
- **Landing rights:** getting global alignment…possible?
- **NTN standards integration…and 6G:** NTN impact with 5G-advanced and 6G?

Source: GSMA Intelligence

Want to learn more? Check it out