Government and military clients are looking to meet global challenges yet spend more efficiently. In the US, deficit-reduction efforts have caused the US Department of Defense (DoD) and its various branches to make serious changes in how it acquires goods and services. During his speech at the AFCEA West conference in early 2011, Undersecretary of the Navy Robert O. Work stressed the commitment of the Navy to “buy smarter” with a budget that was capped at 2010 levels. In an American Forces Press article Undersecretary of Defense for Acquisition, Technology and Logistics Ashton B. Carter is quoted giving the example that US $100 billion of the defense budget goes to weapons systems procurement, US $70 billion of which goes to sustaining already procured systems.

The desire to get a better value for a budget, to not only “buy smarter” but maintain current assets at a more efficient rate, can represent a boon to the satellite industry, particularly in the Commercial-Off-The-Shelf (COTS) area. President Obama's National Space Policy encourages the use of commercial space capabilities and services when they meet, or can be modified to meet, government standards at a cost effective price in a timely manner. The policy also encourages transferring routine, non-sensitive, space functions to the commercial sector. In the U.S. and abroad, one of the popular COTS products which can serve government and military clients with little need for customization is Comms On The Move (COTM). The first case of in-motion COTM was 2003 when an antenna system and a RADOME developed by SeaTel for maritime applications was attached to a Ford pickup truck and used by an NBC reporter embedded in a convoy moving into Baghdad. Since then, the technology in Ku-band COTM has been established for military and emergency responders.

The ability to set up a command center with full communication somewhere, then move it elsewhere as needed easily is attractive from a tactical view and also more economical.

Antenna providers such as AvL offer both “fly-away” and vehicle mounted auto-acquiring models for use at the halt. However, in-motion Vehicle Mounted Earth Stations (VMES) have progressed to where it is unnecessary to stop or transport equipment cases to a location, deploy the antenna, and then pack up when a change in venue is needed. Instead, all of the equipment is mounted on and

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One of the most dramatic moments this summer was the landing of the Space Shuttle Atlantis on July 21 at the Kennedy Space Center in Cape Canaveral, Florida. It was the 135th and final mission of the Space Shuttle program which began in 1981. “After serving the world for over 30 years, the space shuttle earned its place in history. And it’s come to a final stop,” radioed mission commander Christopher Ferguson upon touching down.

“Job well done, America,” mission control responded.

Despite the high price tag of the space shuttle program (estimated at US$ 1.6 Billion per flight), it cannot be denied that it has produced some major benefits to many industries including the satellite industry. The space shuttle was the first to retrieve, repair and redeploy satellites in space and it has help develop robotic systems that will be used in future commercial satellite repair missions.

It could be at least five years or more before the US deploys another manned space transportation program. With a struggling economy and looming budgets cuts, the emphasis is shifting on private commercial ventures into space.

There certainly are a lot of lessons to be learned from the Space Shuttle program., not the least of which is how to contain costs and come up with a more economical alternative. This is where the private sector can make a valuable contribution. However, investments in space assets will always be a formidable undertaking wherein the government must play an important role. And it cannot be done by the private sector alone.

End of an Era?

The shuttle mission STS-51A in 1984 retrieving the Indonesian satellite Palapa B2 for repairs. (NASA photo)
**Military COTS Market.. from page 1**

housed in a vehicle, so a constant state of deployment even in-motion is possible. COTM systems also provide a high degree of mobility, coming in a complete package, such as Cobham's TracStar IMVS 450, part of a line of products initially developed for in-motion satellite TV. Companies like COBHAM TracStar, L3 DATRON, KVH Industries, and others, offer COTM systems on a global basis.

A transportable or vehicle mounted system can be put together from COTS components. Some of these include transmitters, such as ATCi's ATZK – 0100 block up converter which provides up to 100 watts of transmit power and accepts L-band input and the military-grade receivers purchased from Avcom of Virginia for the U.S. Army's JNN/WIN-T program.

Other needs can be served by COTS options such as Globecommm's Everything-Over-IP network services and ViaSat's standard Joint IP Modem (JIPM). These allow disparate IP based peripherals to send and receive data more efficiently and through a single pipe, customized to the required frequency by the RF equipment.

The X band and UHF frequencies are reserved to government and military applications; however, the truly off-the-shelf products and services tend toward Ku-band. “Hosted payloads” on commercial satellites, another service encouraged by the National Space Policy, are commercially developed and operated to provide customized bandwidth to military and industrial clients. X band and UHF satellites are owned and wholly controlled by governments.

However, while fully owned satellites bring in control and security, Ku-band satellites are capable of keeping a network secure enough for all but the top security applications and have the strength of numbers. Ku-band blankets nearly all of the inhabited and traveled parts of the globe. Where a footprint doesn't already exist, providers may have “spare” satellites already in orbit, ready to be moved into place once the client signs off.

Federal and local procurement organizations that procure hardware and services are now equipped to deal effectively in the COTS arena.

For example, the DoD’s Defense Information Systems Agency (DISA) and the U.S. General Services Administration (GSA) partnered on acquisition activities called Future COMSATCOM Services Acquisition (FCSA). This is intended to replace current DISA and GSA contracts which will be expiring in
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2012. During 2010, FCSA solicited for specific end-to-end satellite communications solutions. (These were posted on the fbo.gov website.) Importantly, they are excepting offers for specific satellite services “which require no development or systems integration activities” on a continual basis.

Agencies and departments often issue Requests for Information (RFIs) and Requests for Proposals (RFPs) to contract directly with vendors, though the project in question may not always be completely made up of COTS elements.

An example of this is a recent RFI by SPAWAR regarding an complete fixed earth station. The title and text of the request references commercial-off-the-shelf specifically; however, the project involves proprietary government technology such as X-band frequency transmission and pre-existing software customized for government and military applications. The COTS products are intended to reduce overall cost yet provide the government with hard-hitting capabilities.

As a general rule, the commercial satellite communications industry has met the demand of government for rapidly deployable equipment and services.

The particular benefits of Ku-band satellite capacity in the Fixed Satellite Service (FSS) band along with broadband Very Small Aperture Terminal (VSAT) ground systems were recognized throughout the past decade. Moving forward, the industry has continued to innovate to meet government requirements, yet maintain the cost-effectiveness in which the COTS approach excels.

Michelle Elbert is the Director of Marketing of Satellite Markets and Research and concurrently a consultant with Application Technology Strategy, Inc. She has extensive experience in the satellite and IT industries and has an M.B.A. from Concordia University. She can be reached at: michelle@satellitemarkets.com

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Improved Performance & Specifications
The new PSA-2500C was designed for excellent frequency and amplitude accuracy with a wide variety of resolution bandwidth selections ranging from 10KHz to 1MHz. This is required to allow for viewing and monitoring of small TT&C and data carriers found in many satellite communications markets today. The wideband input will also allow for monitoring of a 10MHz reference signal as well.

Versatile Graphical User Interface
The new Avcom Graphical User interface (GUI) is based on the National Instruments Labview Platform and has been customized for customer’s applications. The Avcom GUI will run on the WINDOWS 2000, XP and Vista platforms. Avcom also offers a multi user version of the software so that multiple users can monitor at the same time. For more information go to www.avcomofva.com
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**Low Tech, High Concept**

There is a need to promote satellite technology as a “high concept” approach

by Lou Zacharilla

If there is anything more short-lived than the attention span of a digital-aged teenager it is the lifespan of an Al Qaeda third-in-command. The ranks near the top of that organization are thin and getting thinner. Among the under-reported stories of the last couple of months is that two “number threes” were killed during the time when Osama bin Laden was holed-up in Abbottabad, Pakistan. There was no memory lapse on the part of the United States and the global alliance of nations, who were determined not to forget the events of 11 September 2001. Nor was there an inability to get the job done. Recently, as we know, bin Laden paid the ultimate price for his extraordinary crime nearly 10 years ago.

While this era and its gruesome reactions will never be forgotten in our lifetime, it does seem that one of the primary reasons that the leaders of a global terror movement are being systematically eliminated is not fully retained in the consciousness of the culture or its businesses. I am speaking about satellites, of course. It seems to be a case of “capability amnesia.” (Or perhaps it is just lousy marketing.) Why? The world evidently no longer thinks of satellites as “high technology.” The thrill of being in space is evidently vanished. Perhaps that is not a bad thing, since technology scares as many people as it thrills; and our visionaries, from SSPI chairman emeritus the late Arthur C. Clarke to Elon Musk and Mark Dankberg, have often said that the goal is to “commercialize” space. While people may not think the satellite industry can generate goose bumps (these people have evidently never been to a launch), we need people to think MORE about satellites.

After the attacks on New York, Washington, Madrid, London, Bali and other peaceful places there emerged a phrase which described their bloody, ruthless planning. Al Qaeda was cited for employing “low tech, high concept” tactics to commit its crimes against humanity. It is a nice phrase to describe bad deeds. So, as U2 lead singer Bono said when he decided that his Irish band would cover the Beatles’ great song, *Helter Skelter*, made famous by cult murderer Charles Manson, “An evil person stole this song. We’re stealing it back!”

We need high concept to promote the commercial satellite option, especially if it is seen as ho-hum technology. In an industry of glorious engineering and engineers, I hear more and more that our challenge is now to tone down “propeller-head” jargon and give rise to ideas. In short, we need to create customers through innovation and game-changing strategies.

Is it being done? Many say no. Why? And what can we do to go further down the road? I decided to ask several industry leaders to get us going. Mark Dankberg, CEO of ViaSat; Adrian Ballintine, CEO of NewSat (and the Teleport Executive of the Year); Keith Hall, COO of Globalcomm Systems and Keith Buckley, President of ASC Signal had a back and forth with me on the subject.

Here is Part One of the discussion.

Lou Zacharilla (LZ): We’re looking for ideas that will make the satellite industry less of a well-kept secret. Maybe...
we have momentum from recent events in Pakistan. Mark Holmes wrote recently that “according to the U.S. CIA, satellite technology should be credited for its silent, crucial role in the mission’s success.” After bin Laden’s hideout was located, the Pentagon’s satellite imagery assisted mightily with the planning and monitoring of the operation. Holmes suspects that satellites were vital in intercepting calls and communications throughout. So we can say that if there were no satellites, there was no stopping Al Qaeda. Seems to me this is a great story to tell. Here’s my question, “How do we tell it better?” Let’s start by discussing your best example of how satellites have contributed to customers, society, the economy or the greater good.

Ballintine: Goodness. How do I count the ways! Let’s stay with defence as an example. The innovation and importance in actual mission support speaks for itself. But let’s look at it as we do at NewSat, from the importance of enabling the welfare of these people who defend us. NewSat provides personal communications for military personnel in Afghanistan. We call this “welfare communications” for soldiers. It is extremely important. Militaries around the world have as a major priority the retention of soldiers, especially in volunteer forces like those in your country.

LZ: So satellites provide support for the morale of warfighters?

Ballintine: Yes. Significant support. At the time of the September 11 attacks, soldiers could use satellite communications a mere 30 minutes every 14 days. This placed enormous stress on them and their families. Retention rates were lower. Now, of course, we enable communication access to them around the clock. So military recruiters have been given the gift being able to recruit the soldier by retaining the family.

LZ: So NewSat, using satellite, provides an always-on broadband connection, no matter where a person is, which allows for a more stable emotional environment back home?

Ballintine: Yes. Soldiers and sailors enjoy the same access as their families and other civilians.

LZ: This is another example of what is possible in what I call “the Broadband Economy.” Mark, ViaSat has made broadband and the phenomenon of an “always-on” connection central to its vision of the future. Yes?

Dankberg: Yes. But it is not a mere technical item. The role of satellites in the national dialogue has to be in proportion to the issues of the day. When I think about our industry’s “Rodney Dangerfield” image, I note other components at work. Perhaps our image has faltered because the industry has become more financially centric in a way that undermines its appeal to the imagination of consumers, politicians, regulators, and governments. I disagree with you about space being “ho-hum.” Space is intrinsically exciting and a romantic place. Satellites of any type are spaceships. Spaceships ought to be capable of capturing a public’s imagination.

LZ: I agree. But can we be criticized for running mature, financially viable businesses? We all have shareholders, investors, customers and employees that depend on financial health.

Dankberg: Of course we do. But the question we are trying to answer goes beyond that and is probably not going to be answered by putting those attributes forward. I don’t think it will be answered either by taking a purely financially-driven, risk-averse and status-quo institution like the global satellite industry and manufacturing a public relations campaign to present it as a technology pioneer or essential to the future of smart grids.

LZ: So where does that leave us?

Dankberg: If we want to create more excitement about the satellite industry, we will need a genuine core. It will involve highlighting the sources of innovation, more risk-taking, and adventure.
**LZ:** That is an innovator’s dilemma, because we are not sure how to approach it at the moment. However, I agree that adventure does capture imaginations. I like that approach. Maybe a new type of adventure is where our “genuine core” is found. Keith, Mark says we need to start looking at innovation and more risk-taking. Where would you start?

**Buckley:** I agree with Mark and also Adrian. You need to look at trends, how people are living their lives and what will enable them to live life more fully, whether they are in military service or seeking what they consider, for them, an adventure. We are all risk-takers, if you look at what we have willingly put on the line for our respective companies.

**LZ:** You seem to be saying that satellites need to somehow connect more to the human experience? A core experience, or several of them.

**Buckley:** That’s right. Mark’s company’s satellite, ViaSat-1, will accommodate the need for broadband and change perceptions about our business. We need to build on it because he is right. Our industry needs to tap into the issue of the day and be there before a market even knows what it needs. But more important, we need to represent something.

**LZ:** That is what makes Apple and other innovators great companies.

**Buckley:** No question about it.

**LZ:** I say that in the satellite industry the need for increased bandwidth, broadband everywhere and the lifestyle to communicate on the move have inside them an innovation waiting to happen.

**Buckley:** Especially to communicate on the move. Mobility has completely changed the antenna systems business. The increase in mobility is going alongside the rise of broadband as an economic enabler. Satellites are right there if we can get the message out. I don’t know if one-time purchases tell us anything, but a few days ago the U.S. Air Force selected our 3.9m lightweight quick-deploy system. It is a big antenna that’s highly mobile and can be deployed anywhere in minutes. I don’t think this is a one-off. It demonstrates a need for smaller, faster and easier.

**LZ:** “Smaller, faster and easier.” Keith (Hall) are there innovations embedded somewhere in this phrase that we can think about as we retool the image of the satellite industry over the next few years?

**Hall:** Forward -Deployed Asset Support Terminal. We decided that one segment of our society which has become very complex is disaster recovery management. The scale of disasters seems to be escalating and gaining a more lethal quality. We know that communications are essential to safeguarding human life and getting things intact again. Globecomm decided to create an enterprise-class platform for organizations that offer a quick-deploy communications solution. To your point, because we are in a “broadband economy,” it was designed to deliver tens of megabits of connectivity and technology options that can turn the platform into a multipurpose hub for local communications as well. To Keith’s point, we have the ability to tie an instant mobile network in to it, providing GSM, CDMA and other mobile standards. To echo what I have been hearing, it is increasingly not about the technological but about satellite enabled technology in support of a core human experience or need.

**LZ:** Which means?

**Hall:** Even Faster! During the time of this year’s SSPI Gala, as you know, we announced a new product named, appropriately, FAST.

**LZ:** I think we’re off to a good start. Next we’ll drill a little further into Mark’s observation that whatever we do to retool the industry’s image, it must come from a “genuine” core. Thanks.
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**Mergers & Acquisitions**

**Stratos Acquires Blue Ocean Wireless Assets**

**July 21**—Mobile and fixed-site remote communications solutions provider Stratos has acquired a majority stake of Blue Ocean Wireless' (BOW) operational assets and will assume responsibility for providing services to most of BOW’s customers.

BOW is a provider of shipboard GSM services that enable maritime crew members to use personal GSM phones. The company targets large, worldwide commercial shipping companies. Stratos will continue to market and sell BOW’s services to existing and new customers, under the new brand GSM Oceanwide. Financial details of the acquisition were not disclosed.

**Court Approves TerreStar Sale to Dish Network for U$ 1.375 Billion**

**July 13**—A US Bankruptcy court approved TerreStar Networks Inc's proposed $1.375 billion sale to Echostar’s Dish Network Corp. The company, which tried to market the first satellite smartphone, had been coveted for its roughly 20 megahertz of spectrum.

EchoStar Corp recently bought Hughes Communications Inc for $1.33 billion, while Dish also bought the assets of Blockbuster Inc, a $320 million deal that closed in April.

The decision comes only days after AT&T and Space Systems Loral (SS/L) filed objections to the sale. AT&T said the plan could prevent it from seeking indemnity from Dish in certain cases where consumers claim damages against AT&T for problems related to the TerreStar phone. While SS/L was objecting to the partial payment it was to receive for three satellite contracts under the plan submitted to the bankruptcy court.

**Executive Moves**

**THAICOM Appoints Suphajee Suthumpun as CEO**

**July 1**—Satellite operator THAICOM Public Company Limited’s Board of Directors announced the appointment of Suphajee Suthumpun as Chief Executive Officer to replace Arak Chonlatanon, who will retire from this post. The appointment is effective August 1 2011. Suphajee Suthumpun is 47 years old and has more than 23 years of experience in the IT industry. Before joining THAICOM, she held the positions of Managing Director of IBM Thailand Company Limited and General Manager of Global Technology Services Group, IBM ASEAN.

**EUTELSAT Appoints Michel Azibert as Deputy CEO**

**July 28**—The Board of Eutelsat Communications appointed Michel Azibert to the post of Deputy CEO and corporate officer on the recommendation of Michel de Rosen, the Group’s CEO.

Michel Azibert will succeed Jean-Paul Brillaud following the General Assembly of shareholders of Eutelsat Communications of 8 November, at which point Jean-Paul will relinquish his operational role as deputy CEO. Michel Azibert will join Eutelsat on 5 September from TDF, where he is currently Deputy CEO, to work closely with Jean-Paul during September and October in order to ensure a smooth transition.

Michel Azibert, 56 years, graduated from the École Centrale de Paris and France’s National School of Administration (ENA - Ecole Nationale d’Administration). From 1982 to 1989 he worked at the French State Council (Conseil d’État), before joining TDF where his appointments have included Development and International director and Group Deputy CEO since October 2008.

**Thuraya Appoints Robert Demers as VP Government Services**

**July 3**—Mobile satellite service provider Thuraya has appointed Robert Demers as Vice President for Government Services. In his new role, Demers will be developing and managing Thuraya’s global government business sector, especially defense in the US, Europe, Middle East and Asia. Prior to joining Thuraya, Demers held several key management positions in the mobile satellite services (MSS) as well as the fixed satellite services (FSS) industries. His extensive experience working within the government sector coupled with a service record in the US Army spanning 22 years makes him an extremely valuable addition to the Thuraya team.

**Inmarsat Appoints Rupert Pearce as CEO Effective January 1, 2012**

**July 6**—Inmarsat plc announced that with effect from 1 January 2012 Andrew Sukawaty will become Executive Chairman and Rupert Pearce will become Chief Executive Officer. Rupert will join the Inmarsat plc board as an executive director effective 6 July 2011. With this appointment Inmarsat
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has implemented a previously announced plan to separate the roles of Chairman and Chief Executive Officer. Rupert Pearce, who currently serves as Senior Vice President of Inmarsat Enterprises and Inmarsat's Group General Counsel, has been with the company for six years.

**Key Appointments at DEV America**

July 15- DEV America has hired industry veterans Michael Benz and Stephen Buff as Area Sales Managers responsible for growing markets for the company’s leading-edge products that help satellite and cable television systems transmit, receive, switch, and distribute RF signals over coaxial and fiber optic cable.

Michael Benz joins DEV America bringing over 20 years of successful sales management experience implementing creative solutions to meet customer requirements, including experience establishing US sales channels and accounts worth over $60 million with global electronics leaders including NEC Electronics and Zilog Semiconductor. Stephen Buff brings 15 years of sales and channel management experience in the government and commercial sectors, including RF, Satcom and video distribution/switching over fiber with Emcore Corporation, Opticomm, Jenco Technologies and others.

In their newly created roles, Benz and Buff will be responsible for growing customer and channel relationships across North America. They will also help satellite, broadcast, cable TV and system integration customers take advantage of new technical resources, stocking inventory, and other support DEV is introducing in North America, and help customers deploy customized solutions. Buff and Benz will report to Rainer Lorger, DEV’s head of worldwide sales and marketing, based in Germany.

**Pierre Cardinal Promoted to VP Global Sales, Advantech Wireless**

July 11- Advantech Wireless Inc., a Canadian-based manufacturer of satellite, RF equipment and microwave systems announced the promotion of Pierre Cardinal to Vice-President, Global Sales, effective immediately. Cardinal initially joined Advantech Wireless as VP Sales, North America and has been instrumental in restructuring and expanding the current sales force. Pierre Cardinal started his career in telecoms as Sales Manager for Teleglobe. He also held senior management positions at Sprint Canada, Cisco, Colubris (currently HP ProCurve) and more recently at SR Telecom.

**Philippe Rouxel Appointed Chief Marketing Officer of GlobeCast**

July 12- GlobeCast announced the appointment of Philippe Rouxel as chief marketing officer. His principal assignment will be to develop GlobeCast’s global product strategy for all business units in France, U.K., Italy, South Africa, Asia, and the Americas. He will lead the implementation of a strategy focused on value-added products in the broadcast market.

Since 2007, Rouxel has held the role of vice president of international distribution for France 24, available to 165 million households across five continents. Previously, he held business development positions with channels belonging to Lagardère, Canal+, Multithématiques, Viacom/MTV Networks International, Première, and Walt Disney International.

Rouxel is a graduate of the EDHEC and CELSA Paris-Sorbonne.

**SpaceX Names Mark Bitterman as Senior Vice President of Government Affairs**

July 12- Launch services provider Space Exploration Technologies (SpaceX) announced that former Orbital Sciences Corporation executive Mark Bitterman is joining the company’s Washington office as Senior Vice President of Government Affairs.

Bitterman spent nearly two decades at Orbital Sciences Corporation. Hired as director of government relations in 1992, he rose to senior vice president of government and external relations in 2000. Prior to his time at Orbital, Bitterman spent four years at the U.S. Department of Defense as the Special Assistant for Intelligence, Special Operations, and Counter-Drug Policy to the Assistant Secretary of Defense for Legislative Affairs. Before joining the Pentagon, Mr. Bitterman spent two years as a foreign military sales specialist with TRW, Inc., and from 1986 through 1995, he was a U.S. Naval Reserve officer with the Office of Naval Intelligence.

**SpaceCom Names Akhtar Ali Chief Technology Officer**

July 21- SpaceCom International has named Akhtar Ali to be its Chief Technology Officer. In this role, he will be responsible for engineering oversight of satellite and ground resources, custom and complex network solutions and exploring the increasingly important KA band and related technologies. Akhtar is well respected throughout the global telecommunications Industry as a technology and engineering specialist. He has more than 16 years experience in the industry.
Market Briefs

Key industry trends and opportunities.

Research Highlights Major Opportunity in Social Media and Participation TV

Social Media TV Projected to Generate US$ 2.9 Bil. by 2016

London, July 19, 2011--Mobile and digital technology business Mobile Interactive Group (MIG) today released a major research white paper on the trends and opportunities in participation TV (P-TV) services in particular social channels across global markets.

The research uncovers key technological and behavioural insights into the entire P-TV value chain, from the types of devices that consumers use to interact with TV shows (tablet, internet, mobile, apps, SMS, fixed line) how they multi-task with them whilst watching TV and over which payment channels they prefer to purchase participation services such as voting and competitions. It also interrogates mash-ups between established social media channels, in particular Twitter and Facebook, with TV and interactivity concluding that there is an emerging and potent P-TV model based on interactivity driven through social media – Social Participation TV, a new term identified by MIG.

Key research findings include:

- **Mobile will become the main vehicle for interaction between viewer and broadcaster**

  40% of mobile users are most likely to be multi-tasking using their phone while watching the TV.

- **Smartphone and tablet adoption will drive TV and mobile multi-tasking in UK and US, creating a more engaged audience, and significantly increasing programme interaction**

  The majority of multi-tasking occurs during the evenings and weekends during peak TV times when online browsing declines and mobile browsing grows.

- **Facebook will drive a shift in interactive audience behaviour away from phone calls and text with these channels becoming peripheral in the long term**

  Facebook mobile now accounts for 50% of its 700 million users globally. 67% of all respondents indicated that the internet is the ideal way to interact with TV shows with 50% of those indicating that Facebook would be their preferred channel to purchase and use participation TV services such as voting.

- **Interactive events via Facebook are expected to generate $51.7 million ( £32.04 million) in the UK by 2012 and $2.9 billion globally by 2016**

  MIG’s global research into the Social Participation TV sector, incorporated qualitative and quantitative insights from The IAB and PhonePay Plus and Adfonic, and also drew conclusions from interviews conducted with 3,000 consumers in the UK.

  Barry Houlihan, CEO, Mobile Interactive Group said: “Social participation TV is a huge opportunity for MIG and our broadcast partners, with mobile featuring as the key enabler and engagement tool. The mobile device is ingrained in our daily lives, and is rapidly becoming a core component in the ability to create an interaction between the viewer and the TV.”

  For broadcasters, the direct consumer interaction can be the ideal opportunity to capture data, while Facebook presents an ideal viral opportunity. But it also highlights the need for every program strategy to adopt a multi device and platform approach, to ensure maximum viewer reach and engagement.

  As a medium, TV continues to be the biggest and best in terms of attracting a large audience; and mass P-TV shows like Big Brother remain the cornerstone for broadcasters in terms of interaction and entertainment, while also opening new revenue channels.

  MIG’s technology platform ‘mVoy’ enables broadcasters, media and production companies from all over the world to interact, engage and communicate with viewers via any mobile device (incorporating the internet and Facebook).
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OTT Unlikely to be Primary Pay-TV Service

London, July 22, 2011-Consulting firm Analysys Mason's recent pay-TV forecasts for Europe, predicts that the number of pay-TV households will increase by 12% to 185.2 million between 2011 and 2016. "Over-the-top services are far more likely to appeal as complementary, rather than primary, pay-TV services." according to Cesar Bachelet, Senior Analyst at Analysys Mason.

According to Bachelet since 2009, connected TVs have become increasingly available and affordable as all the major consumer electronics manufacturers move to capitalise on this emerging opportunity. "As a result, we are beginning to see mass adoption of these devices: in March 2011, BITKOM, the German Federal Association for Information Technology, Telecoms and New Media, estimated that half of all the new TVs sold in Germany were hybrid, Internet-connected TVs. For the first time, average consumers can readily gain access to over-the-top services directly through their TV sets, without seeking out devices geared towards specific niches, such as games consoles or Internet set-top boxes, like Apple TV devices," he added.

The report however believes that the impact on traditional pay-TV is likely to be far smaller than the sales figures for connected TVs suggest, for a variety of reasons. Analysys Mason therefore expects that only 2.58 million households will be using an over-the-top service as a primary service for their main TV set in Europe in 2016, representing a mere 1.4% of pay-TV households.

"Although over-the-top services will not displace traditional pay-TV services (cable, IPTV, pay DTT or satellite) as the main provider of video services to the primary TV set, we anticipate much stronger growth for over-the-top services as a complementary, or secondary service, mostly on additional TV sets, for which many consumers are reluctant to incur ongoing additional charges of multi-room services. We believe that 14.6 million households will be using over-the-top services as a secondary TV service, attracted by the ability to supplement free-to-air content on a pay-per-use basis," said Bachelet.

On Demand TV Revenues to Rise by 58%

Middlesex, UK, July 26, 2011-On-demand TV revenues from movies and TV programs (and excluding revenues from other sources such as sports and adult and also excluding SVOD packages) will reach US$5.7 billion in 2016, up from US$3.6 billion in 2010 and US$2.1 billion in 2006, according to the report published by Digital TV Research.

By platform, digital cable will generate US$2.6 billion in 2016, almost double the US$1.5 billion recorded in 2010. DTH will remain the second largest contributor, with US$1.7 billion revenues in 2016. However, the gap between the two platforms will widen over the next five years. IPTV will overtake DTT in 2012 to become the third largest platform. DTT on-demand revenues are mainly confined to Western Europe, especially Italy.

Report author Simon Murray said: "Much emphasis has been placed on on-demand services making up the operators' shortfall in declining TV subscription revenues as homes converted to bundled packages and as greater competition leads to lower fees. On-demand TV revenues will grow, but not fast enough to compensate for this decline."

Consumers can also catch up with missed programs via the internet. Web-based catch-up services are often easier to use than TV-based ones, allowing the viewer greater flexibility and a better environment to select. TV-based services will improve as smart sets become more commonplace.

By region, North America and Western Europe will still supply two-thirds of global on-demand revenues by 2016, though this is down from 80% in 2010. However, on-demand TV revenues will triple in the Asia Pacific region over the same period to reach US$1.2 billion. China will provide a lot of this growth.
CommunicAsia 2011 Highlight Opportunities in the Asia-Pacific Satellite Market

by Virgil Labrador, Editor-in-Chief

There was a noticeably strong presence from the satellite sector in the recently concluded CommunicAsia 2011, held concurrently with BroadcastAsia 2011, with CEOs from all the major satellite operators speaking at the conferences and a record 110 satellite companies exhibiting at both shows.

The consensus among the speakers which included the CEOs of the biggest satellite operators such as Intelsat and SES was that the future for satellite service providers in the Asia-Pacific is in the broadband space. One of the highlights of the CommunicAsia Satellite Summit and other pre-conference events was the recent announcement of the largest satellite operator Intelsat that it will invest US$ 1.3 billion in four satellites serving the Asia-Pacific region. The second largest operator SES likewise announced plans to launch three satellites to cover Asia-Pacific in the next 3-5 years. “All the right ingredients are there for the take off of various broadband and Direct-to-Home (DTH) applications in the Asia-Pacific market,” said SES’ CEO Romain Bausch.

“High Throughput Satellites (HTS) using Ka-Band technology which is considered ideal for broadband applications is largely considered as the future of satellite technology according to Doron Elinav, Marketing Director of Gilat Satellite Networks. Elinav says there is opportunity for satellite service providers in the extension of 3G networks, backup for cellular backhaul and overflow of data.”

Tom van der Heyden, CEO of Sky Fiber, said in his presentation on “Mobile Backhaul and Broadband Internet Services” that wireless carriers are facing a “tidal wave” of social networking and internet-driven mobile services that cannot be met by purely terrestrial networks. Carriers have to use satellites to meet growing demands on their networks said van der Heyden but face latency issues in the geostationary arc. Sky Fiber announced at the show a “multi-year, multimillion dollar” reseller agreement with O3B Networks which is launching a constellation of Ka-Band satellites in Medium Earth Orbit (MEO) will address the issue of latency and provide fibre-like speeds.

According to telecoms analyst Oliver Johnson the deployment of next generation networks in Asia is allowing service providers to supply new innovative offerings such as multiplay packages, IPTV, fixed-mobile convergence and sophisticated enterprise solutions. Factors shaping this dynamic market include Gross National Income (GNI), the growth of urban populations, national regulatory environments and the spending plans and policies of governments in the region.

“The region is also home to a mix of mature, emerging and youthful broadband markets. “In Asia at the country level it is clear that the internal as well as international digital divides will remain a fact of life to the end of the decade and beyond,” said Johnson.

Research findings released at the show by Point Topic affirm that Asia remains the fastest growing region for broadband with 16.21 per cent – almost double that of the Americas. Asia’s fixed broadband subscribers now make up 42 per cent
of the global total, up from 40 per cent last year, with Europe and the Americas behind with 30 per cent and 25 per cent respectively. Emerging markets are making strides, with the Middle East and Latin America advancing quickly, according to findings of the Point Topic research.

With an increase of over 15.2 million subscribers in the first three months of this year, fixed broadband grew by 2.9 per cent globally. This was the biggest quarterly increase in the last two years and representing an annual growth rate of 11.93 per cent, according to figures released by the Broadband Forum. IPTV also shows exceptional growth rates with an increase of over 34 per cent in the 12 months to the end of March 2011, based on the data prepared for the Broadband Forum by Point Topic.

“Broadband is showing healthy double digit growth and has in fact increased its growth rate this year. This indicates how vital it has become to businesses, residential consumers and countries,” noted Robin Mersh, CEO of the Broadband Forum.

The strong Asian growth is due in large part to the continuing success in broadband in China with 42 per cent of the net additions to the total global broadband subscriber numbers coming from China and its territories (the Special Administrative Regions of Hong Kong and Macau) in the first three months of 2011.

While broadband demand in Asia is strong and will be for years to come, there are challenges that need to be overcome. Broadband penetration is still below 20 percent for most of the Asian region (compared to over 60 percent in North America and some parts of Europe). Johnson thinks Asia could not get to 50 percent penetration by the end of the decade without major government involvement. “Some markets are at risk of being left behind and will need some central intervention to avoid that outcome,” said Johnson. “In addition it’s essential that competition in the service market is free and fair,” he added.

Virgil Labrador is the Editor-in-Chief of Satellite Market and Research based in Los Angeles, California. He is the author of two books on the satellite industry and has been covering the industry for various publications since 1998. Before that he worked in various capacities in the industry, including a stint as marketing director for the Asia Broadcast Center, a full-service teleport based in Singapore. He can be reached at virgil@satellitemarkets.com
With its theme "TV365: Watch Closely!" the CASBAA flagship annual meeting, the CASBAA Convention 2011, will be staged at the Grand Hyatt hotel, Hong Kong Oct 31-Nov 3, 2011. This year's program will explore television in the myriad ways it can be experienced - 365 days a year...in more than 365 million multichannel TV homes throughout Asia...on a full 360° range of platforms and devices.

“This year’s theme truly reflects the evolution of the multichannel TV industry in Asia – a fitting topic especially during this year, CASBAA’s 20th Anniversary. Now, more than ever, the concept of television has been stretched to encompass technologies not even dreamed of back in 1991,” said Simon Twiston Davies, CEO, CASBAA. “This year’s Convention program promises to be better than ever with a comprehensive lineup of compelling industry keynote speakers.”

With video content now truly transportable, consumer driven demand and the prospect of more localization is providing a compelling storyline.

“In the new paradigm, consumers will do what it takes to get the content they want to see if we don’t make it accessible,” stressed Twiston Davies. “More than ever before, the regulator is now both the weather-maker and the barometer shaping how the industry will change and develop in the future.”

The four-day CASBAA Convention 2011 will bring together operators, content providers, satellite services, technology, carriers and ad agencies from across Asia and the world in lively debate and exchange of information through Keynote addresses, In Conversation sessions and panel discussions. Networking breakfasts, lunches and official receptions allow delegates to connect with their peers in informal social settings and to forge new partnerships.

This year’s Convention will cover a diverse range of topics including pay-TV markets with the fastest rates of growth including China, Japan, Malaysia and India; multichannel TV content, delivery and how technology is influencing the way viewers consume media; how social media is affecting the business of multichannel TV, how the pay-TV industry has evolved over the past two decades; innovative ways to build meaningful relationships with consumer; regulatory issues affecting the pay-TV industry and much more.

Among the influential roster of speakers confirmed for this year are Blair Westlake, Corporate VP, Media & Communications Group; Carolina Lightcap, President, Disney Channels Worldwide and Andy Lack, CEO Multimedia Group, Bloomberg.

Also returning to the schedule this year are the popular Eurosport CASBAA Golf Masters, WMN/CASBAA Convention 2011 Breakfast, CASBAA/ABU/UNICEF Asia-Pacific Child Rights Award Presentation 2011 and the always entertaining CASBAA Charity Ball.

“This year’s Convention promises to continue upholding CASBAA’s ongoing mission to Inform, Represent and Connect with our members and industry professionals with a potent combination of compelling speakers, relevant topics and engaging events,” added Twiston Davies.

For more information about the Convention 2011, go to: http://www.casbaaconvention.com/.
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Bringing High Technology Down to Earth
The U.S. Government Accountability Office (GAO) released its Space Situational Awareness Report recently. The report among other things catalogued over 16,000 pieces of debris in space which could potentially cause harmful damage to satellites in orbit.

Source: GAO Space Situational Analysis Report 2011 (GAO 11-545)
The Satellite Markets 25 Index™ is a composite of 25 publicly-traded satellite companies worldwide with five companies representing each major market segment of the industry: satellite operators; satellite and component manufacturers; ground equipment manufacturers; satellite service providers and consumer satellite services. The base data for the Satellite Markets Index™ is January 2, 2008—the first day of operation for Satellite Market and Research. The Index equals 1,000. The Satellite Markets Index™ provides an investment benchmark to gauge the overall health of the satellite industry.

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