

SPACE COMMUNICATIONS AND NAVIGATION SYMPOSIUM (B2)
Fixed and Broadcast Communications (2)

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INDIA AND CHINA – NEW VOICES IN THE SATCOM ARENA

Abstract

Acknowledging the domains of excellence that Chinese and Indian space industry has been able to build through ambitious space programmes, the authors of this study have investigated the background against which this success has been achieved. The study focused on the political, regulatory, economic and business aspects affecting the downstream value chain in the satellite communication sectors in both countries. The authors have further identified future domains of co-operation that can be of mutual benefit to Europe, China and India. In the global satellite provider business, regional players find it hard to survive without protectionist measures. India has recently liberalized its SatCom market, as a result more than 7 DTH service providers compete with each other – more than anywhere else in the region. SatCom in China is still largely publically-owned. During a recent phase of corporatisation the monopolist China SatCom moved under the umbrella of China Telecom. There are currently no tendencies to liberalize the SatCom market in China despite ongoing liberalisation in the terrestrial telecoms sector as required by WTO. China and India have grown as major players in the global space market, swiftly scoring significant achievements in launch systems, manned spaceflight, scientific, telecommunication and Earth observation satellites. The investment in defence and institutional programmes supports the development of commercial products. The levels of resources committed are very substantial in absolute terms and comparable to other global players. The ground segment and the value-adding industry are expanding at a fast pace under the concurrent pressure of an unyielding demographic and economic growth, spread over large territory, a buoyant industrialisation and an incomplete telecommunication terrestrial infrastructure. Both countries can rely on a vast pool of national expertise in software. The paper will provide a deeper insight into the Indian and Chinese SatCom sectors and in particular the applications that are most advanced and promising in these countries. The Authors will also highlight recommendations for European Space Industry for cooperation with these countries in various applications domains.