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Navigating Satellite Development Trends: Strategic Opportunities for System Integrators

TAIWAN SATCOM FORUM 2026

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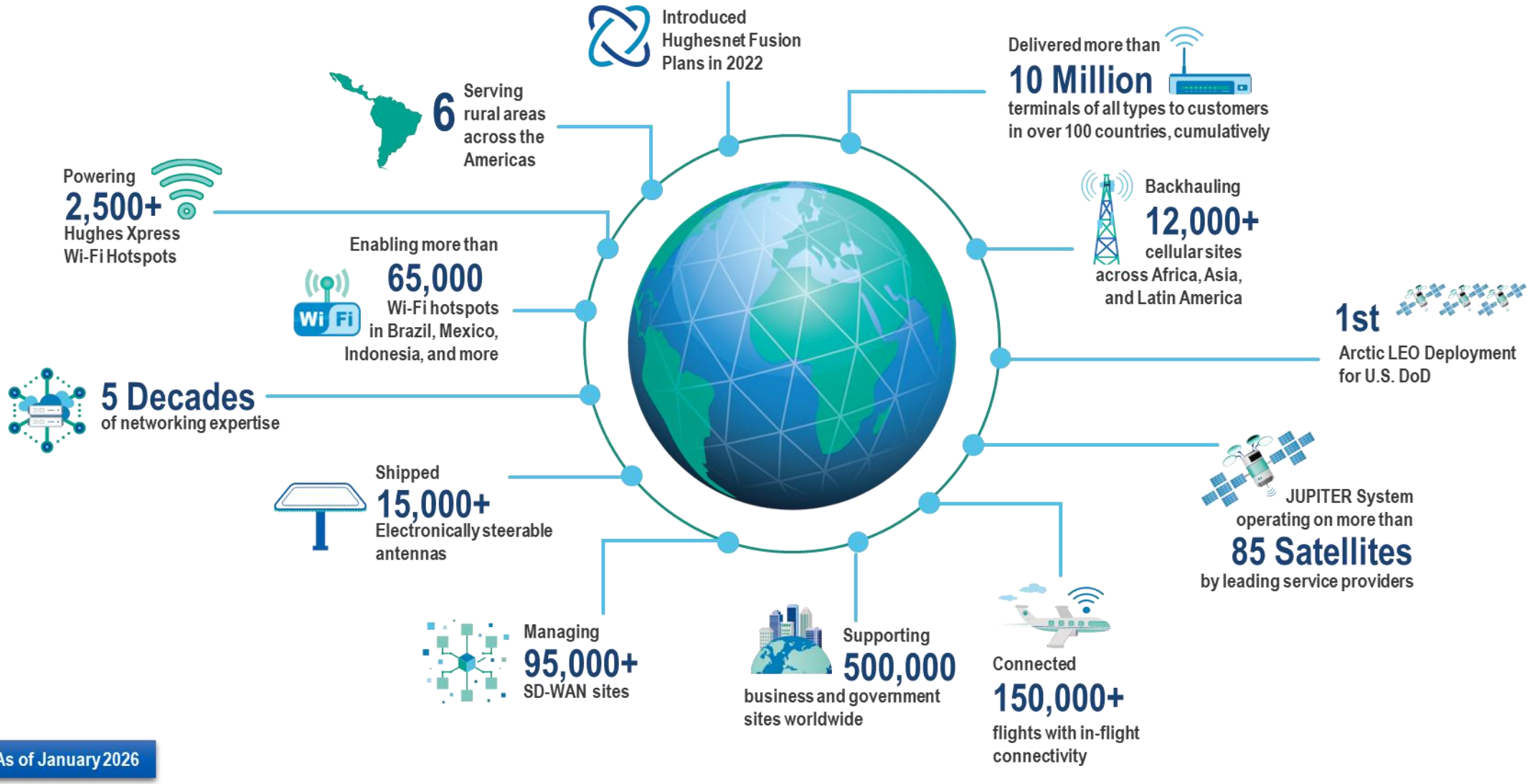
State of the Business



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The Next SATCOM Era

The Next Satcom Era is Multi-Orbit, Multi-Domain, and Opportunity-Rich

- GEO Ka-band expansion
- MEO connectivity for MALE UAVs
- LEO for mobility (rail, maritime)
- Government push for unified management

System Integrators will make these domains work together

Global Landscape Shift

- **Satellite Connectivity Is Rapidly Transforming**
  - Multi-orbit architectures become default
  - 5G Non-Terrestrial Networks accelerating
  - Virtualized ground systems
  - Customer expectations: seamless, application-aware connectivity

Taiwan is entering this phase now

Taiwan Market Dynamics

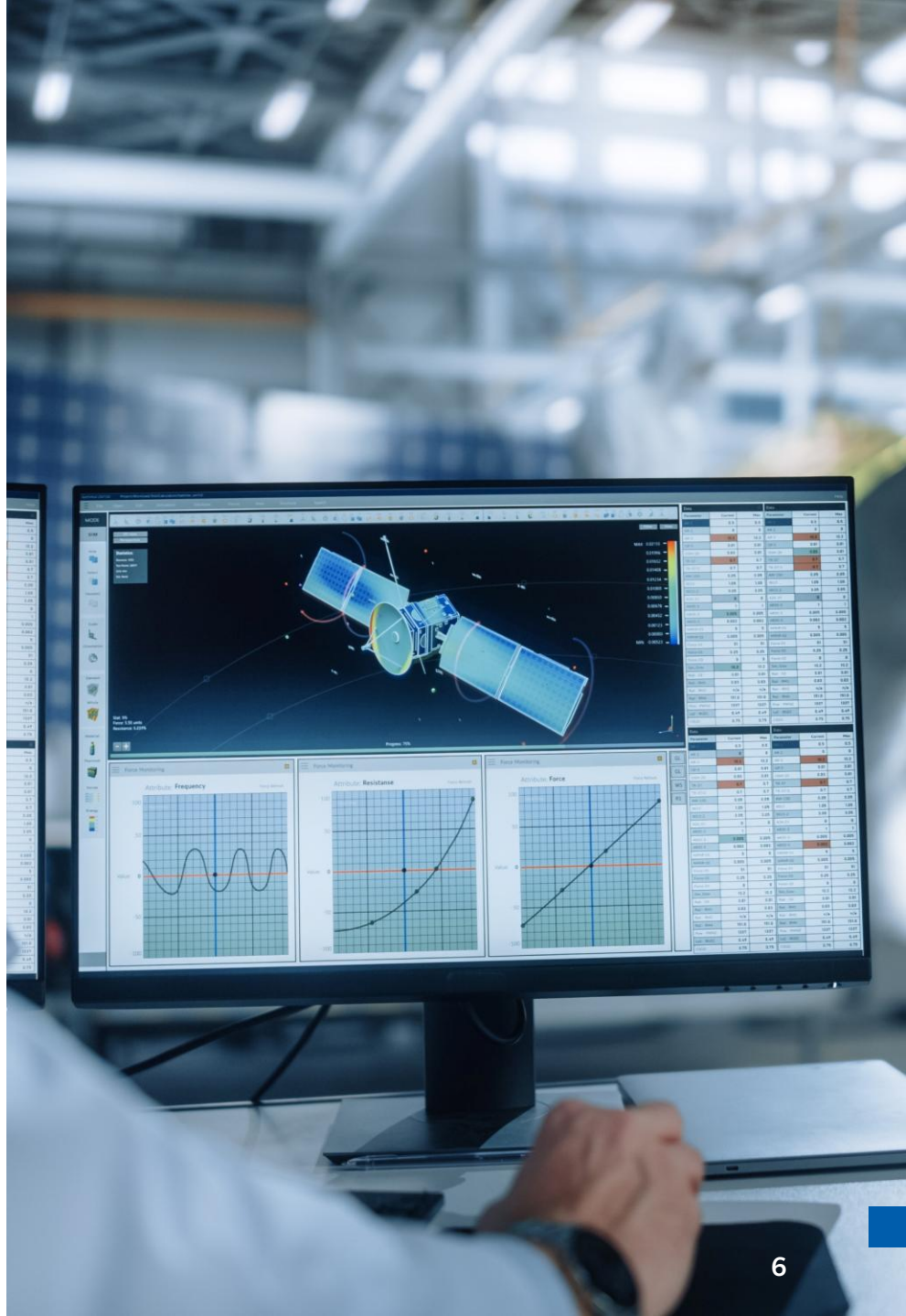
- **Four Forces Shaping Taiwan's Satcom Roadmap**
  - Availability of Capacity drive market opportunity
  - Taiwan has all 3 LEO, MEO and GEO capacities
  - Demand for resilient networks across agencies and enterprises
  - UAV's are critical assets in todays' defense architecture
    - Operating them Beyond line of sight requires satellite connections
    - Hughes offers Industry proven solutions across all the 3 orbits offering different advantages
- **Mobility Digitization**
  - Demand for supporting Mobility using satellite networks

Integration & orchestration become critical

Multi-Orbit Networks

- **Multi-Orbit Hybrid Connectivity**
  - GEO + MEO + LEO convergence
  - Intelligent traffic steering & application routing
  - Mission-critical for mobility, national coverage & defense

- **Strategic Opportunity — Multi-Orbit Orchestration**
  - Integrate GEO/MEO/LEO seamlessly
  - SD-WAN/SD-SAT for application-aware routing
  - Ongoing optimization as a managed service



Software-Defined Ground

- **Software-Defined Ground & Virtualization**
  - Virtual hubs & cloud-based network functions
  - Flexible, scalable service deployment
  - Cloud management reduces OPEX

- **Strategic Opportunity — HTS Ground System Upgrades**
  - Ka-band HTS gateways needed nationwide
  - Integration of JUPITER modems, hubs & monitoring
  - Space for SIs to provide O&M and lifecycle services

Taiwan's Ka-band procurement = major System Integrator opportunity

5G NTN: Future Directions

- **Satellite as Part of 5G**
  - 5G NTN standards maturing
  - Critical for IoT, backhaul & mobility
  - Seamless integration with terrestrial ecosystems
  - As Telco's look towards Autonomous Networks, satellite solutions are looking to cash in on the trend

- **Strategic Opportunity**
  - Rail and mobility operators exploring
  - LEO for passenger connectivity
  - Defense modernization increasingly reliant on UAV ISR data links
  - Ka-band HTS GEO systems expanding national capacity
  - Government agencies preparing for resilient 5G + satellite architectures
  - Strong push for cross-domain unified network management (NMS)

Delivering fully integrated NTN architectures for rail, enterprise, defense, and public safety

Verticalized Solutions

- **Customers Want Solutions, Not Bandwidth**
  - Sector-specific architectures
  - Connectivity + analytics + cloud + security
  - Unification of multiple satellite domains

- **Strategic Opportunity**
  - Unified NMS for Government to manage GEO, LEO, MEO, and diverse ground systems

Unified NMS for all government satellite assets

What Should System Integrators Do Next?

- **Look at the strengths of the different services and look to provide solutions**
- **Develop multi-orbit (GEO/MEO/LEO) integration stacks**
- **Build vertical packages (rail, maritime, defense)**
- **Engage early on Government Unified NMS planning**

Integration is the New Center of Gravity in a Multi-Orbit Satellite Future

Thank You