



AEROCONNECT @ FARNBOROUGH AIR SHOW

News / Events / Festivals



The GVF – EMP organised AeroConnect programme will this year take place in the Navigate room of the Farnborough Exhibition and Conference Centre, on July 19th, as an embedded component of the Farnborough Air Show. The AeroConnect programme, now in it's fourth year, is a roundtable style conference bringing together users, providers, integrators, operators and equipment manufacturers of connectivity technologies delivering both consumer and operational broadband services to commercial aircraft worldwide. There is no charge to attend and delegates can register via the following link:

<https://www.uk-emp.co.uk/current-events/aeroconnect-farnborough/registration/>

The Inflight Connectivity Context: Millennials & Generation Z

The world's networks of commercial airline routes – carrying increasing numbers of passengers, a constantly growing proportion of which are 'Millennials' and 'Generation Z' – are evolving. No longer will they be only a mode of transportation between domestic or international physical/geographical hubs, but also social networks in the sky – connecting the passenger (carrying two or even three wireless devices) to the home, to the office, to the circle of friends, to the YouTube ecosphere, etc. – and comprising aircraft that will increasingly become hubs in the

communications sense of the word, using the technologies of fixed (FSS: Ku-band, Ka-band) and mobile (MSS: L-band) satellite systems and air-to-ground (ATG) networks. Whilst flight arrivals may always be subject to delays, widespread inflight connectivity (IFC) has most definitely arrived, or is at least undercarriage down, on final approach.

Two to Three Devices per Passenger

Demand for delivery of content to multiple devices per passenger exists the world over and most passengers are willing to pay for it. Use of personal devices – to stream video, access apps, browse the web, email, play games, video conference, and engage in social media – will progressively and completely replace long- and medium-haul on-board, server-based, inflight entertainment systems and introduce a common passenger experience for passengers of short-haul/low cost carriers.

What the Analysts are Saying

According to Euroconsult (Prospects for In-Flight Entertainment and Connectivity, May 2017), over 17,000 commercial aircraft will offer broadband IFC to passengers by 2021, and NSR's Aeronautical Satcom Markets report (5th edition, May 2017) forecasts IFC to be installed on 1 out of 3 commercial passenger aircraft by the end of 2019, and 2 out of every 3 by the end of 2026. Specifically, according to the NSR report, over 50 per cent of the addressable commercial passenger aircraft market will have IFC served by FSS and/or High Throughput Satellites by 2021.

Additions to the numbers of, and further improvements in the capabilities of, HTS operating in the Ku- and Ka-bands, according to Euroconsult, will result in the amount of bandwidth capacity dedicated to IFC reaching 21Gbps by the end of 2018, and increasing to almost 300Gbps by the close of 2026.

Indeed, some of the industry's leading IFC solutions providers have started to deploy networks offering up to hundreds of Gbps.

Enabling Technologies

Such developments, as well as others in, for example, terminal antenna technologies, will contribute to enabling commercial airlines – as their flights increase in number and their networks of routes expand to support growth in passenger demand – to meet the requirements of their customer base for a connectivity experience to at least match that (in performance and maybe of price) of their Wi-Fi or 4G experience on the ground; the passenger expectation of IFC will include the ability to video stream, not just update Facebook status and post a few Tweets.

Customer Connectivity Experience – a Choice Criteria

Airlines, driven by customers' increasingly making their choice of commercial carrier based on connectivity experience, will be forced to accelerate the rate at which they install IFC equipment to their fleets and they will themselves experience a market featuring an increasing number of solutions providers, and also find themselves having to make business model choices that successfully engage the passenger/IFC customer based on pricing strategies ranging from free, to freemium, to hourly premium.

IFC service-provider revenue growth through to 2026 is forecast, by Euroconsult, at 21 per cent (CAGR), and NSR forecasts that the installed IFC base will generate revenues of over US\$32 billion over the 2017-2026 period.

Conference Programme

Moderators

Martin Jarrold, Chief of International Programme Development, GVF

Betty Bonardel, President, AB5

Anver Anderson, President, Anver Ltd

0930-0945:

Opening Remarks from the Moderating Team

Martin Jarrold, Chief of International Programme Development, GVF

0945-1015:

Backdrop & Context Briefing

Florent Rizzo, Senior Consultant, Euroconsult

1015-1145:

Session 1: In Orbit ... Inflight ... In the Cabin: The Technologies

- Satcoms: Ku-band and Ka-band in the Mix
- GEO, MEO & LEO: the Hybrid Approach
- Next Generation ATG Networks
- The Integration of Space-Based and Ground-Based Networks
- Connections & Installations: Break down by technology
- Inflight Hardware – Current & Future Market Scale
- Technology Trends
- New Players in the Market Dynamic
- Solutions Architecture, Design & Engineering Strategies
- Terminal Design & Airframe Compatibilities
- Terminal Capabilities for the Passenger & Carrier Requirement
- Terminal Evolution & Future Proofing
- Future Hardware Evolution: Antennas, Wireless Access Points, Servers and Routers

Anthony Spouncer, Senior Director Global Operational Services, Inmarsat

Mark ter Hove, Director Air Transport Satcom, Cobham Aerospace Communications

Gez Draycott, Vice President Market Solutions Engineering, SES Networks

Robert Skuza, Vice President Aero Vertical Market, Comtech EF Data

Steve Moses, Senior Director Vertical Market Solutions Product Management, iDirect

Mario Mancini, Assistant Vice President Southern Europe, Hughes

1145-1300:

Session 2: Airlines & Customers: Aeronautical Applications, Technology Platforms & Passenger Services

- The Cloud & Big Data from Gate-to-Gate
- The Airline Application Environment
- The Passenger Online Environment
- The Airline Carrier Operational Data Environment
- Satellite Operators' IFC Market Servicing Strategies
- Aeronautical Digitisation & Cyberspace: Aviation Sector Vulnerabilities

David Garrod, Senior Vice President Business Development, PHASOR Inc

John Finney, Founder, Isotropic Systems

Anver Anderson, President, Anver Ltd

Richard Skaife, Managing Director, Cann Research Ltd

Andrew Sikorski, Policy Analyst, Access Partnership

1300-1400:

Session 3: User Expectations, Provider Capabilities: Business Models in the Cruise

- The Passenger, the Airline, and the Connectivity Solution Provider
- Deployment & Installation Planning: The Aircraft Manufacturer & the Airline Carrier
- Broadband Bandwidth: Reconciling Supply & Demand Realities
- Passenger Choice Drivers & Carrier Offerings
- Future Proofing: Connectivity, Upgrades & Speed
- Multiple Device Connectivity
- Aircraft Connectivity – Regional Variations, Aircraft Type Variations
- Low-Cost Carriers & IFC
- IFC – Cost-Centre or Revenue Generator?
- Airlines, Service Providers, Satellite Operators – The Market Share
- Drivers & Inhibitors of Market Growth

Robert Skuza, Vice President Aero Vertical Market, Comtech EF Data

Alex Cowan, Chief Executive Officer, Razorsecure

Mohammad Choudhary, Chief Executive Officer, Patron

Shahida Barick, Head of Spacecraft Operations, Effective Space

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