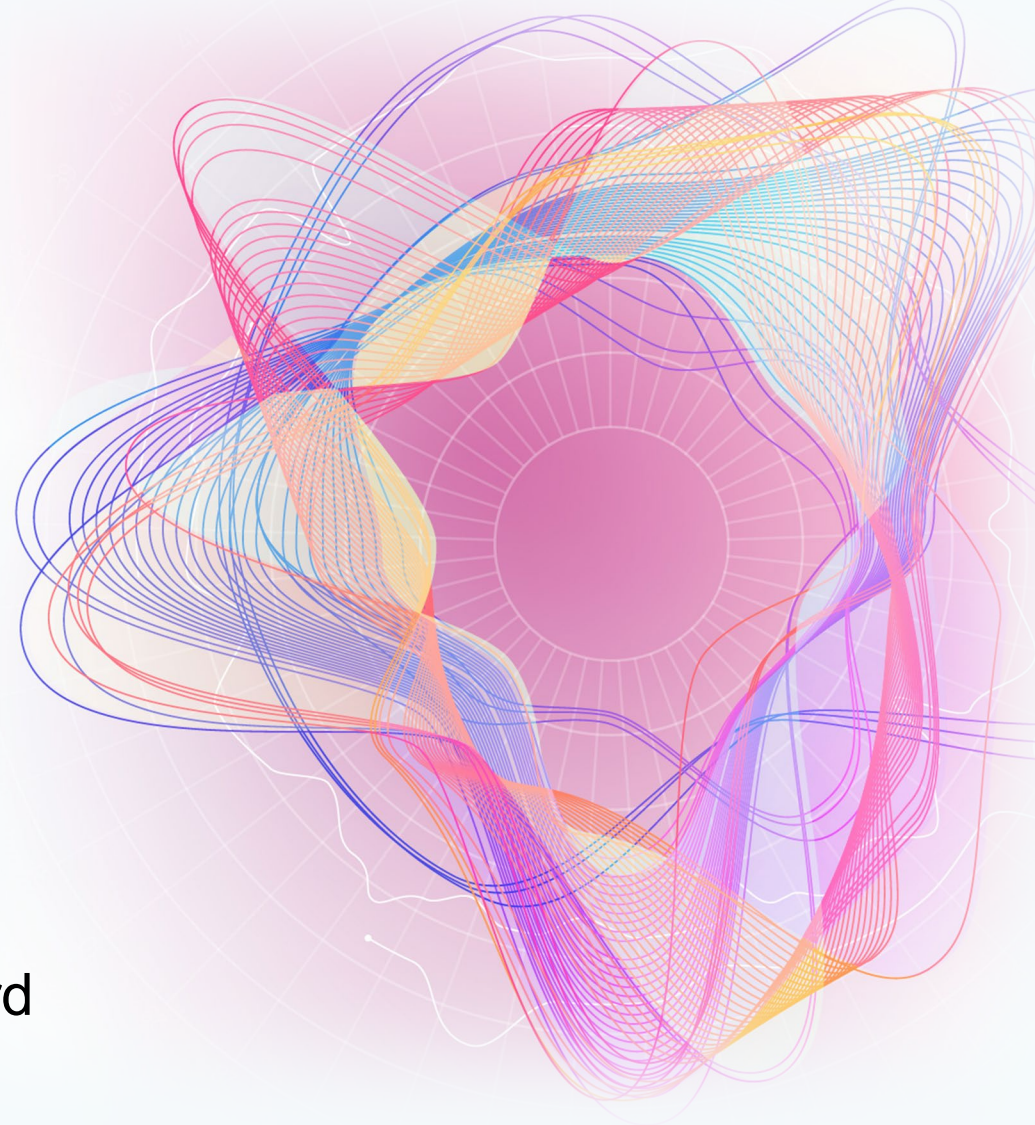


Report of the EGTI subgroup on satellite-based connectivity Indicators

Key Findings, Proposed Indicators and Way Forward

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Why Did We Establish the Subgroup?

- The satellite connectivity landscape is changing rapidly
 - ✓ Rapid expansion of LEO satellite broadband
 - ✓ Emergence of Direct-to-Device(D2D) connectivity
 - ✓ Growing use of Satellite IoT
 - ✓ Increasing integration of satellite and terrestrial networks
 - ✓ Satellite increasingly supporting underserved and remote connectivity

Key Question

- Do existing indicators adequately capture these developments?





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countries
participatingPrivate sector
experience &
perspectives

What Did the Subgroup Find?

Satellite connectivity is no longer a homogeneous service

	Dimensions	Diversity Observed
1	Orbit	GEO / MEO / LEO
2	Services	Fixed broadband / Backhaul / D2D / IoT
3	Business models	Retail / Wholesale / B2B / B2G
4	Network integration	Standalone / Hybrid terrestrial-satellite

Measurement implication

A single subscription indicator cannot capture the full satellite ecosystem

Main Methodological Challenges



1. Classification

- Satellite vs terrestrial
- Fixed vs mobile
- Standalone vs integrated

2. Attribution

- Who reports the data?
- Satellite operators or MNOs?
- Risk of double counting

3. Data Availability

- Different regulatory / reporting frameworks
- Different levels of national visibility

4. Emerging Services

- D2D
- Satellite IoT
- Hybrid connectivity

The existing indicator i271s



Current position

- i271s remains useful and should be maintained

Strengths

- Established indicator and provides continuity
- Captures an important component of satellite broadband

Limitations

- Primarily subscription-based and does not capture emerging services
- Limited ability to distinguish new connectivity models

Subgroup recommendation

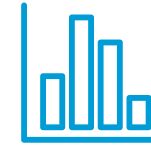
- Maintain i271s but explore refinement and complementary indicators.

What Should Future Indicators Look Like?



Five guiding principles:

1. **Relevance:** Support policy and market monitoring
2. **Feasible:** Countries can realistically collect the data
3. **Comparable:** Can support international comparisons
4. **Simple:** Avoid unnecessary reporting burden
5. **Future-proof:** Remain relevant as technologies evolve



Proposed Indicators for Pilot Testing

Three priority indicators

1. Total satellite-based broadband subscription (refinement of i271s)
 - Focus on end-user subscription
 - Explore fixed/mobile distinction
2. LEO satellite broadband subscriptions
 - Active end-user subscriptions
 - Exclude D2D integrated into mobile subscription
3. Direct-to-Device subscriptions/connectivity
 - Distinguish D2D-enabled from actual D2D usage

What We Learned from Countries



There is already valuable national experience.
Countries are collecting different combination of:

- Satellite subscriptions
- Technology/orbit breakdowns
- Traffic
- Terminal / point of presence
- QoS
- D2D pilots

Key Observation

There is no single common approach yet

Recommendations and Way Forward



The subgroup recommends a gradual, evidence-based approach:

1. Maintain the current indicator i271s
2. Pilot the three proposed indicators
 - i271s: with fixed / mobile distinction, ensure end-users are included
 - LEO: Active end-user subscriptions
 - D2D: Distinguish D2D-enabled from actual D2D usage
3. Test the definitions
4. Continue methodological work
5. Extend the subgroup's mandate for another year