

**#1 – Emergence of New Satellite Operators**

2008 witnessed the emergence of new satellite operators **New Dawn** (Mauritius), **NigComSat** (Nigeria), **O3b Networks** (Channel Islands), **ProtoStar** (Bermuda), **Rascom** (international organization comprised of 44 African states), **Venesat** (Venezuela), **ViaSat** (USA), **Vinasat** (Vietnam) and **Yahsat** (UAE).

**#2 – FSS Demand Grows Worldwide**

Leading providers of fixed satellite services, including **Intelsat, Ltd.** and **SES**, reported record revenues and significant growth in backlog during the third quarter of 2008. The positive trend is expected to continue with increasing demand for capacity in the Middle East, North Africa and Asia-Pacific regions.

**#3 – Satellite Manufacturers Keep Pace**

21 commercial satellite orders (including one order for a constellation of 16 satellites) were announced in 2008. **China Great Wall Industry Corporation**: PAKSAT-1R; **EADS Astrium**: KA-SAT, Express AM4 (in cooperation with **Khrunichev Space Center**) and ASTRA 1N; **JSC Academician "MF Reshetnev" Information Satellite Systems**: Amos-5; **Khrunichev State Research and Production Space Center**: KazSat-2; **Lockheed Martin Commercial Space Systems**: BSAT-3b; **Orbital Sciences Corporation**: Intelsat-18 and AMC-1R; **Space Systems/Loral**: NSS-14, ViaSat-1, Satmex 7, Sirius 5, HISPASAT 1E and EchoStar XV; **Thales Alenia Space**: W3B, Nilesat-201, Koreasat 6 (in cooperation with Orbital Sciences Corporation), RASCOM-QAF1R, EuropaSat and the O3b constellation of 16 satellites.

**#4 – Industry Copes with Credit Crunch**

Despite the sharp reduction in available debt financing and downturn in equity investments worldwide, several successful financings were announced: **Intelsat, Ltd.** finalized \$10b in debt refinancing; **Yahsat** secured \$1.2b in debt financing and **New Dawn** concluded an asset-based financing. Companies needing to refinance: **Sirius XM Radio Inc.**, **ICO Global Communications** and **Globalstar, Inc.**

**#5 – Milestones in Space**

**NASA** celebrates 50 years in space; **Sir Arthur C. Clarke** dies at 90; **Japan** removes ban on military space activities; NASA mission confirmed the presence of water on Mars; **China's** third manned-space mission takes first spacewalk; **India** launches its first Moon mission.

**#6 – Robust Year for Launch Services**

41 commercial satellites were successfully launched in 2008. **Arianespace**: Star One C2, VINASAT-1, Skynet 5C, Turksat 3A, ProtoStar I, BADR-6, AMC-21, Superbird-7, Hot Bird 9 and W2M; **Boeing Launch Services Inc.**: GeoEye-1 and COSMO-SkyMed; **Cosmos 3M**: ORBCOMM CDS and five ORBCOMM Quick Launch satellites; **International Launch Services**: THOR 5, Inmarsat-4 F3, Nimiq 4, ASTRA 1M, Express-AM33 and three GLONASS-M navigation satellites; **ISC Kosmotras Dnepr**: five RapidEye satellites; **Land Launch**: AMOS-3; **Lockheed Martin Commercial Launch Services**: ICO G1; **Long March**: ChinaSat-9 and Venesat 1; **Sea Launch Company**: Thuraya-3, DIRECTV 11, Galaxy 18, EchoStar XI and Galaxy 19; **Starsem (Soyuz)**: Giove-B.

**#7 – Mobile Satellite Services Developments**

**Solaris**, **ICO**, **Terrestar** and **Inmarsat** take part in the European Union's S-band mobile satellite services selection process; **Iridium** announces SPAC deal and **NEXT** generation satellite system; **Globalstar** receives authority to provide WiMAX services in the United States; **Inmarsat** BGAN fully operational globally; **XM-Sirius** merger complete; **EchoStar Corp.** suspended construction of **CMBStar** satellite; **WorldSpace** files for Chapter bankruptcy protection.

**#8 – Remote Sensing Market Matures**

**GeoEye-1** hi-resolution (0.41 meter) satellite launched; **RapidEye** launches five satellites; **COSMO-SkyMed** launches fourth satellite.

**#9 – Rockets Away**

**Space Exploration Technologies Corp.** (SpaceX) successfully launched its **Falcon 1** vehicle and completed a static test firing of its **Falcon 9** core stage; **NASA** awards **Orbital Sciences** and **SpaceX** International Space Station resupply services contracts; **Sea Launch Co.** returns to flight a year after an on-pad failure; **Land Launch** debut flight from **Baikonur Cosmodrome**; **Proton** rocket returns to flight after its March failure.

**#10 – Ka-band Satellite Internet**

**ViaSat** and **Eutelsat** to jointly offer satellite broadband services in North America and Europe; **Avanti** signs up broadband customers for **HYLAS**; **HughesNet** begins services on **SPACEWAY-3**; **O3b Networks** announces plans to deploy high speed, low cost satellite system.