

## Table of Contents

<b>Executive Summary</b> .....	<b>I</b>
<b>COMSTAC 2012 Commercial Geosynchronous Orbit Launch Demand Forecast</b> .....	<b>5</b>
EXECUTIVE SUMMARY .....	5
HISTORY OF THE REPORT .....	6
FORECAST METHODOLOGY .....	7
COMSTAC COMMERCIAL GSO LAUNCH DEMAND FORECAST RESULTS .....	8
Addressable vs. Unaddressable .....	8
Mass Classes .....	9
Dual-Manifesting .....	11
Near-Term Demand Forecast .....	13
Comparison with Previous COMSTAC Forecasts .....	14
COMSTAC DEMAND PROJECTION VS. ACTUAL LAUNCHES REALIZED .....	14
Factors That Affect Satellite Launch Realization .....	14
Projecting Actual Satellites Launched Using a Realization Factor .....	15
FACTORS THAT MAY AFFECT FUTURE DEMAND .....	17
Launch Service Providers .....	22
Regulatory Environment .....	24
Financial Markets .....	25
Space Insurance .....	26
SUPPLEMENTARY QUESTIONNAIRE RESULTS .....	27
SUMMARY .....	29
<b>2012 Commercial Space Transportation Forecast for Non-Geosynchronous Orbits</b> .....	<b>35</b>
INTRODUCTION .....	35
Report Purpose and Methodology .....	35
Commercial NGSO Launch Industry Components .....	36
REPORT SUMMARY .....	38
NGSO PAYLOAD SEGMENTS .....	41
Commercial Telecommunication Satellites .....	41
Commercial Remote Sensing Satellites .....	49
Science and Engineering .....	56
Commercial Cargo and Crew Transportation Services .....	60
Other Payloads Launched Commercially .....	65
SATELLITE AND LAUNCH FORECAST TRENDS .....	66
RISK FACTORS THAT AFFECT SATELLITE AND LAUNCH DEMAND .....	71
Financial Uncertainty .....	71
Political Uncertainty .....	72
Technical Uncertainty .....	72

APPENDIX 1: VEHICLE SIZES AND ORBITS . . . . .	75
APPENDIX 2: HISTORICAL NGSO MARKET ASSESSMENTS . . . . .	76
APPENDIX 3: SCIENCE AND ENGINEERING PAYLOADS . . . . .	80
APPENDIX 4: ACRONYMS . . . . .	84

## List of Tables

Table 1. Commercial Space Transportation Payload and Launch Forecasts . . . . .	2
Table 2. Forecast Commercial GSO Satellite and Launch Demand Data. . . . .	6
Table 3. 2012 GSO Forecast Team. . . . .	6
Table 4. Addressable and Unaddressable Satellites since 1993. . . . .	9
Table 5. Satellite Mass Class Categorization . . . . .	9
Table 6. Total Satellite Mass Launched per Year and Average Mass per Satellite. . . . .	10
Table 7. Trends in Satellite Mass Class Distribution . . . . .	10
Table 8. Commercial GSO Satellite Near-Term Manifest . . . . .	13
Table 9. ITAR-free Satellites. . . . .	25
Table 10. COMSTAC Survey Questionnaire Summary. . . . .	27
Table 11. Historical Addressable Commercial GSO Satellites Launched (1993–2011) . . . . .	29
Table 12. Historical Unaddressable Commercial GSO Satellites Launched (1993–2011) . . . . .	33
Table 13. Near-Term Identified NGSO Payload Manifest . . . . .	40
Table 14. Narrowband Systems . . . . .	41
Table 15. Wideband Systems . . . . .	42
Table 16. Broadband Systems . . . . .	42
Table 17. FCC Telecommunication Licenses . . . . .	43
Table 18. Commercial Telecommunication Satellite Systems' Design Life . . . . .	48
Table 19. NOAA Remote Sensing Licenses. . . . .	50
Table 20. Commercial Satellite Remote Sensing Systems. . . . .	51
Table 21. Science and Engineering Payloads for 2012-2015 . . . . .	57
Table 22. NASA Commercial Crew and Cargo Awards . . . . .	62
Table 23. Payload and Launch Projections. . . . .	67
Table 24. Distribution of Payload Masses in Near-Term Manifest. . . . .	68
Table 25. Distribution of Launches among Market Segments. . . . .	69
Table 26. Historical Payloads and Launches. . . . .	76
Table 27. Historical NGSO Payload and Launch Activities (2002-2011) . . . . .	77

## List of Figures

Figure 1. Combined 2012 GSO and NGSO Historical Launches and Launch Forecasts. . . . .	1
Figure 2. 2012 and Historical GSO Payloads and Launches . . . . .	2
Figure 3. Projected NGSO Launches from 2012-2021 . . . . .	3
Figure 4. Forecast Commercial GSO Satellite and Launch Demand . . . . .	5
Figure 5. Addressable and Unaddressable Satellites since 1993 . . . . .	8
Figure 6. Total Satellite Mass Launched per Year and Average Mass per Satellite . . . . .	10
Figure 7. Trends in Satellite Mass Class Distribution. . . . .	11

Figure 8. Dual Manifesting and Launch Demand . . . . .12

Figure 9. Comparison of Annual Forecasts: 2000-2012. . . . .14

Figure 10. Realization Factor . . . . .16

Figure 11. NGSO Launch Industry Components . . . . .36

Figure 12. Number of Payloads Seeking Launch and Associated Launches in 2012-2021 . . .38

Figure 13. Commercial NGSO Launch History and Projected Launch Plans. . . . .39

Figure 14. Publicly Reported Globalstar Annual Revenue. . . . .44

Figure 15. Publicly Reported Iridium Annual Revenue . . . . .45

Figure 16. Publicly Reported ORBCOMM Annual Revenue . . . . .46

Figure 17. Commercial Telecommunications Launch History and Projected Launch Plans . .48

Figure 18. Commercial Remote Sensing Launch History and Projected Launch Plans . . . .56

Figure 19. Science and Engineering Launch History and Projected Launch Plans . . . . .59

Figure 20. Forecast of COTS, CRS, and commercial crew missions. . . . .61

Figure 21. Commercial Cargo and Crew Transportation Services Launch History and Projected Launch Plans. . . . .64

Figure 22. Payload Projections . . . . .66

Figure 23. Launch Projections . . . . .66

Figure 24. Comparison of Past Launch Projections . . . . .68

Figure 25. Launch Vehicle Projections . . . . .69