CONNECTIVITY

From Capacity to Capability: The New Playbook for Asia-Pacific Operators

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Regional operators are reinventing themselves. With the rise of megaconstellations and consolidation among global satellite operators — regional operators are rethinking their approach and turning toward orchestration and integration, while pressing their local advantages.

Regional operators describe a shift in the competitive market from owning orbits and infrastructure to delivering solutions. Change is manifesting across their businesses in different ways, whether that's rethinking CapEx, striking new partnerships, or expanding into new business areas like Earth Observation (EO). *Via Satellite* interviewed five Asia-Pacific regional operators about how their businesses are evolving.

"It is the most difficult time, but most exciting and challenging in our minds," AsiaSat CEO Roger Tong says. Regional operators find themselves at an inflection point with rising customer expectations, intensifying global competition from both Low-Earth Orbit (LEO) constellations and Geostationary Orbit (GEO) operators, and competition from outside the satellite industry.

"The number one challenge for operators is accepting the fact that the old business models will never return and incremental improvements are not going to be sufficient," Tong says. "Regional operators have to move forward and focus on horizontal and vertical cooperations, drive our cost down as a community to exert industry pressure on suppliers, increase agility, and integration of service deliveries but not as resellers."

By being "hyper local," regional operators have a unique role in terms of market access, landing rights, local infrastructure, customer relationships, and trusted engagements with their governments, says Thaicom CEO Nile Suwansiri.

"For regional operators like Thaicom, our role is evolving from being a traditional satellite capacity provider to becoming a multi-orbit space services company," Suwansiri says. "The right question is not whether regional operators can outspend global LEO constellations. We cannot, and we do not need to. The question is whether we can combine global space infrastructure with local trust, regulatory access, service delivery, and national capability. That is where regional operators remain highly relevant."

As GEO- and broadcast-centric business models are changing, KT SAT CEO Kevin Choi says the Korean satellite operator is shifting toward orchestration and integrating and operating across GEO, LEO, direct-to-device, terrestrial, cloud, and AI technologies

“We believe the future ‘Operator 2.0’ model will evolve beyond a traditional satellite operator into a multi-layer managed service provider. The key competitive advantage will be orchestration capability,” Choi says. “In the future, success will depend less on how many assets an operator owns, and more on how effectively it can leverage ecosystems and partnerships to solve customer problems.”

Starlink Fueling a Shift to Integrated Services

Asia-Pacific satellite regional operators agree that Starlink has changed the expectations around satellite connectivity. Starlink has changed the industry in three ways, Suwansiri explains. It’s raised customer expectations for satellite broadband to be simple, fast, and easy to activate. It has shown the value of vertical integration and has shown that satellite can be a scalable digital service.

“Regional operators do not need to copy that [vertical integration] model entirely, but we must become much more software-driven and service-oriented,” Suwansiri says. “The lesson is clear. The future operator must be faster, more customer-centric, and more integrated. We should not defend the old model. We should build the next one.”

Thaicom CEO Patompob (Nile) Suwansiri. Photo: Thaicom

Many regional operators have partnered with Starlink, and Amazon Leo is gaining momentum in partnerships in this region as well. Measat, KT SAT, and Sky Perfect JSAT all serve as Starlink resellers in their respective countries,

Thaicom made news in recent months as an early partner of Amazon Leo. For Suwansiri, the deal is an indication of Thaicom’s shift to a multi-orbit space services company, and bringing together the benefits of LEO with the local expertise of a regional operator.

“Thaicom’s recent partnership with Amazon Leo, where Thaicom acts as authorized distributor and landing-rights holder in Thailand, is a good example of this model — not passive resale, but a market-access and service-integration role built on local legitimacy and operational capability,” he says.

Measat Chief Operating Officer Yau Chyong Lim is firm in the belief that regional operators have not been relegated to the role of reseller; it’s not a zero sum game between GEO and LEO.

“From Measat’s perspective, customers buy outcomes, not orbits,” Lim says. “Governments, enterprises, mobility, and critical infrastructure users prioritize assured capacity, predictable performance, regulatory compliance, resilience, and long-term service continuity. GEO continues to play a critical role in these areas, while LEO offers clear but complementary

advantages rather than a universal replacement. Partnering with LEO players can be a strategic choice, but it does not replace the value regional operators deliver."


Yau Chyong Lim, COO of Measat

Lim says that Measat takes a selective and partnership-driven approach to LEO, integrating LEO capabilities where it adds value like low-latency broadband, mobility, IoT, and EO, through hybrid, multi-orbit solutions.

Operators see integration solutions as the path forward. For KT SAT, while the operator serves as the official Starlink partner in Korea, Choi says the company's focus is on integrating LEO connectivity and operating multiple networks for customers, not on selling LEO connectivity itself.

KT SAT uses SD-WAN-based platforms such as XWAVE-ONE to provide optimized connectivity that's tailored to customer missions and requirements. "We believe the future role of regional operators will evolve from simple capacity resellers into operational partners that can integrate and manage diverse networks around customer missions," Choi says.

Japanese operator Sky Perfect JSAT also points to the importance of orchestration and delivering value-added solutions. Teruo Yamashita, managing executive officer, and unit president of the Space Business Unit, tells *Via Satellite* that while Starlink has changed customer expectations, it has spurred the shift to a multi-orbit architecture. He and others pointed to the unique role of GEO.

Sky Perfect JSAT is a Starlink reseller in Japan and is advancing discussions with Amazon LEO, Yamashita said.

"While competition certainly exists in some areas, we see GEO and LEO becoming increasingly complementary. GEO remains highly effective for wide-area coverage, broadcast, resiliency, and high-capacity applications, while LEO provides advantages in low latency and mobility use cases," Yamashita says. "The future is less about 'GEO versus LEO,' but rather how to integrate multiple layers of infrastructure seamlessly.

A Global Push for Sovereign Space

There's been a global push around sovereign space, for nations to secure their own access to space capabilities. While this trend has multiple layers and sovereign space access can take multiple forms, some regional operators see opportunity to meet the needs of their nations and regions. Regional operators take a broad view to what sovereignty means — beyond just owning assets in space.

"We also believe that sovereign capability is not limited to owning satellites alone," Yamashita says. "The ability to integrate communications, EO, data analytics, and multi-

orbit networks into operational solutions will become increasingly important for national resilience, disaster response, and security applications."

Yamashita pointed to Sky Perfect JSAT's involvement in an EO constellation effort in Japan, working with partners including QPS Research Institute to enhance EO capabilities through SAR and optical satellite integration.


Kevin Choi, CEO of KT SAT

KT SAT CEO Choi agrees — sovereign connectivity is a strategic domain for the company as Korea's leading satellite operator, but this doesn't mean the company will build every infrastructure independently, and the balance with cooperation is key.
"In government and defense markets, customers are now prioritizing operational control, security, and resilience rather than simple connectivity alone. Demand is growing for architectures that can maintain communications even during disruptions or crisis situations," Choi says. "KT SAT is strengthening its government and defense capabilities through multi-layer resilient architectures integrating GEO, LEO, and terrestrial networks."

Thaicom sees opportunity across three layers — the infrastructure layer of satellites and ground systems, the geospatial data layer, and sovereignty.

"At the sovereignty layer, the issue is not only ownership of satellites," Suwansiri says. "It is the ability to control critical services, protect national data, ensure continuity during crises, and develop domestic capability over time. For Thaicom, this is a natural extension of our role. We have operated national satellite infrastructure for more than three decades. The next phase is to support Thailand and regional governments with secure, sovereign, and resilient space-enabled services."

AsiaSat, which is based in Hong Kong, has a different view here. Tong emphasizes the operator has always been a commercial company and stays out of geopolitics.

"AsiaSat has always been a commercial company and is not involved in any geopolitics, even though some customers or countries like to believe otherwise," Tong says. "Therefore, we do not take advantage of any sovereign space/national security opportunities. Equitable access to space has long been an objective of the ITU [International Telecommunications Union] and we stand by that."

Evolving CapEx Strategies

What does the next-generation satellite fleet look like for Asia-Pacific regional operators, and how are operators rethinking their CapEx plans?

AsiaSat has been in a relatively CapEx-free period with its GEO fleet, giving the company time to consider its next options. "We are in no rush for replacement but rather we are looking for opportunities that require new infrastructure or capabilities for vertical integration that are sustainable," Tong says.


Roger Tong, CEO of AsiaSat

Tong believes that the company is too small to invest in LEO infrastructure. "Our approach is to work with LEO operators to support our end customers in services they need and be infrastructure-agnostic," Tong adds.

Some regional operators have tapped startup GEO manufacturers for new satellites, with Thaicom ordering Thaicom-9 from Astranis, KT SAT ordering a satellite from AscendArc, and Sky Perfect JSAT's joint venture Space Compass ordering a satellite

For Thaicom, Suwansiri says the investment logic for GEO has changed. Instead of purely replacing capacity, Thaicom is looking for flexibility, higher throughput, and better unit economics.

He said in the medium-term, Thaicom is investing in flexible, software-defined GEO capacity to respond to changing demand across Asia-Pacific. Over the longer term, the company looks to combine GEO with LEO partnerships, ground infrastructure, and downstream services.

"Our future investment will remain selective and disciplined. We will invest where we have clear orbital rights, visible demand, anchor customer commitments, strategic relevance, and a credible path to long-term returns," Suwansiri says.

It's clear the landscape for GEO replacement has shifted and operators are thinking carefully about how they replace aging GEO satellites. Measat has a near-term CapEx focus to replace MEASAT-3b, which is expected to reach end of life around 2029 to 2030. Lim says the operator is in the RFP stage and expects to conclude the evaluation process "in the near term."

"This will not be a like-for-like GEO replacement," Lim says. "The new satellite will continue to anchor our core services at the 91.5 degrees East orbital slot while incorporating more advanced, flexible payload capabilities, including in-orbit frequency reconfiguration. This gives us greater agility to respond to changing customer demand, regulatory requirements, and market dynamics over its lifetime."

Lim notes that this satellite will also support Malaysia's sovereign space ambitions by securing the orbital slot and ensuring continued independent control over national broadcasting and telecommunications infrastructure.

For Sky Perfect JSAT, its recent CapEx plans have gone beyond communications satellites, procuring 10 high-resolution Pelican satellites from Planet last year. The operator has two upcoming software-defined satellites — Superbird-9, built by Airbus and scheduled

for launch in 2027 and JSAT-31, built by Thales Alenia Space and scheduled for launch in 2029.

JSAT also plans to invest 150 billion yen ($940 million) in its space business from fiscal year 2026 through fiscal year 2027, Yamashita says.

“These investments are not only aimed at enhancing commercial competitiveness, but also at supporting resilient infrastructure relevant to national security, disaster response, and critical infrastructure applications,” Yamashita says. “Our investment strategy is designed to position SKY Perfect JSAT to evolve into a multi-orbit solution provider rather than a traditional satellite capacity operator.”

Looking to the Future

Moving forward, Yamashita describes an ‘Operator 2.0’ that’s built on three elements: a multi-orbit architecture combining GEO, LEO, and terrestrial infrastructure; stronger partnerships across the ecosystem with satellite operators, launchers, technology and cloud providers, and telecom operators; and a transformation into data and solution providers fueled by Earth Observation and AI analytics.

“The traditional model of simply providing satellite capacity is no longer sufficient. Operators must evolve into integrated solution providers capable of combining connectivity, data, applications, and operational support,” Yamashita says. “The biggest challenge for operators will be how quickly they can transform their business models, organizational capabilities, and corporate culture to adapt to this rapidly evolving environment.”

Yet Sky Perfect JSAT emphasizes that regional operators have important competitive advantages with their understanding of local market and regulatory environments, customer relationships and government needs. “[These] remain highly valuable, especially as space infrastructure becomes more closely tied to national resilience and sovereign capability,” he adds.

Measat COO Lim agrees that the future is in integrated, multi-orbit architectures, and operators must also expand into areas like EO and broader space technologies.

“The roadmap to profit is built on capital discipline and focused execution: anchoring revenues in long-term government and enterprise demand, defending and repricing GEO HTS in high-value segments, and tightly aligning CapEx with clear revenue milestones,” Lim says. “By maximizing asset utilisation, sharing costs through partnerships, and operating with greater agility, regional operators can deliver durable, higher-margin services and remain relevant and profitable in a multi-orbit future.”

AsiaSat CEO Tong casts the change as regional operators entering into a new era. GEO operators have become too comfortable operating as “landlords” in orbit, he says.

“Holiday season is over for regional operators and the days of occupy and lease will not return,” he adds. “The road to profitability takes hard work and perseverance — execute with

determination and speed, while staying open-minded. Do not view others as competitors but as partners that can provide better services to our customers." **VS**