

From: Art 4.1.b (TRADE)
Sent: 27 May 2015 10:06
To: ASENIUS Maria (CAB-MALMSTROM); EICHHORN Nele (CAB-MALMSTROM);
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 (EEAS-GENEVA)
Cc: SCHLEGELMILCH Rupert (TRADE); Art 4.1.b (TRADE);
 Art 4.1.b (TRADE); Art 4.1.b (TRADE)
Subject: Cabinet meeting with ESOA (EMEA Satellite Operators Association), Wed
 13 May 2015
Attachments: Malmstrom Cabinet - Market Access_Final.pdf; Satellites - critical for
 Europe.pdf

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Introductory meeting with a delegation of ESOA (EMEA Satellite Operators Association) to present their association and outline their trade interests

Participants:

- ESOA: Aarti Holla (Secretary General, ESOA), Cecil Ameil, Chairperson of the ESOA Regulatory Working Group (SES), Art 4.1.b ESOA
- COM: Maria Åsenius, Nele Eichhorn (CAB), Art 4.1.b (G3), Art 4.1.b (B1)

ESOA started by explaining their association and its recent expansion to represent the interests of not only EU but henceforth all EMEA-based (EU, Middle East, and Africa) satellite operators.

They portrayed satellites as a true success story for Europe, both in terms of services and construction, which should be defended against unfair competition or new trade barriers. EU satellite operators are mainly active on telecommunication services (more than e.g. earth observation). Making the link with the Digital Single Market, they stated satellites are unique placed to bridge the digital divide – they can reach out and deliver broadband everywhere. Satellites will also remain critical for all types of linear television, while ESOA consider the telecom infrastructure of the future to become hybrid satellite-terrestrial networks. They defended free flow of information ("satellites are a key enabler, relaying communications while being content agnostic"), but also acknowledged the increasingly difficult environment.

Main trade interests:

- ESOA advocated for free competition and an open skies policy (although they also claim that too many players are entering the market – already in Africa 8 countries have national satellite projects, which is more a matter of prestige rather than economic viability)
- satellite operators do not require physical presence to operate in a given country. However, newly introduced requirements for e.g. data localisation or other measures motivated by alleged national security considerations go against the industry's long term business plans (launching and operating a satellite is usually a 25-30 years investment)

- Spectrum allocation can be a real barrier. CNECT is ESOA's normal counterpart for spectrum issues, but ESOA asked to ensure that EU spectrum policy would not deviate from the ITU rules
- On FTAs, they focus on WTO accessions and FTAs, with a particular focus on TiSA. They hope the EU-US ICT principles could be spread and made more binding, and hoped that TiSA discussions on telecom could lead to an update of the 1998 Telecom Reference Paper (so as to cover all electronic communications)

Attached are two presentations ESOA handed over at the meeting.

{apologies for late reporting}