

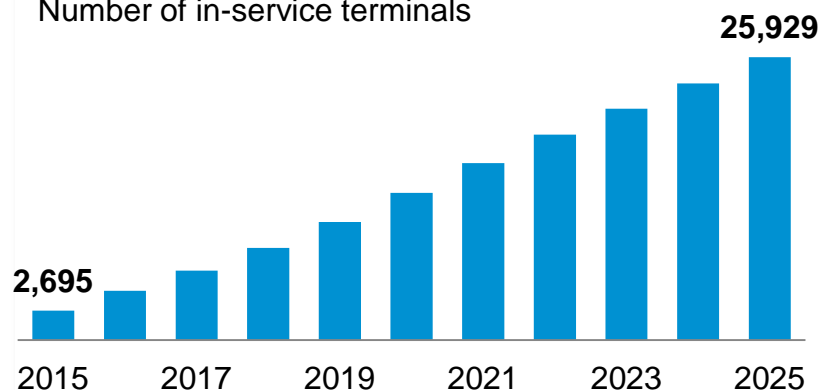
SES's growth markets: Mobility

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Substantial growth outlook in Mobility

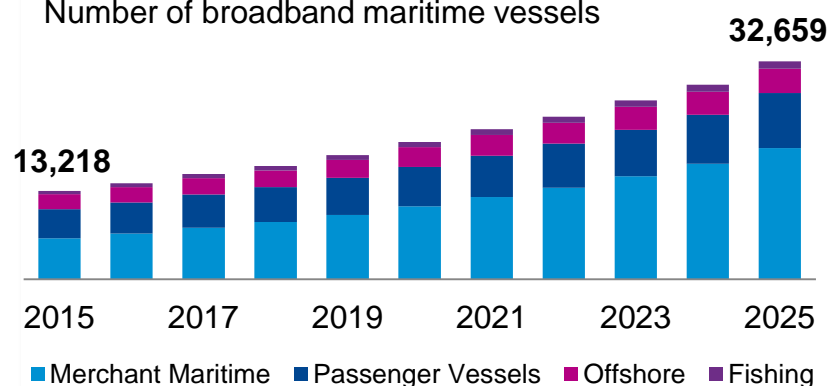
Number of connected planes⁽¹⁾

Number of in-service terminals



Number of connected ships⁽¹⁾

Number of broadband maritime vessels



- ▲ Growth driven by explosion in passengers carrying smartphones, tablets and laptops
- ▲ Dramatic rise in airlines deploying IFC, and resulting surge in connected aircraft over next decade in all regions, led by North America
- ▲ Maritime segment driven by cruise requirements, which accommodate BYOD for up to 5,000 passengers per ship
- ▲ Office-at-sea, cargo processing, ship diagnostics and crew welfare driving the maritime space
- ▲ SES has cemented solid, long-term contracts and with virtually global providers, and is establishing recognition and 'brand' with end-users (fleet owner/operators)
 - Already serving up to 2,000 aircraft today
 - 5% of group revenue (revenue +25% in 2015 at constant FX)
 - 20%-30% of SES HTS already pre-committed, two years ahead of OSD

¹⁾ Source: NSR (FSS only)

Passengers expecting a home-equivalent quality of service

- ▲ Importance of moving with changing consumer demand patterns supports SES's technology approach



	Yesterday	Today	Tomorrow
Satellite	L-band	Ku wide beam and HTS Ka spot beams	GEO Ku/Ka HTS, MEO
Antenna	Flat aperture	Phased Array	Metamaterial & conductive coverings
Modem speed (FWD / RET)	6 Mbit/s / 4 Mbit/s	150 Mbit/s / 18 Mbit/s	200 Mbit/s / 30 Mbit/s
Throughput per plane	1 Mbps	2-10 Mbps	>200 Mbps
Typical app	Email	Email, Browsing, Social Media and Video Streaming	At home-type experience (including HD video)
Take up rate	3%	6%	>50%
Date rate per seat ⁽¹⁾	166 kbps	0.5 Mbps	>2 Mbps

1) Assuming an average of 200 passengers per aircraft



Providing a scalable and optimised global solution



SES HTS Coverage, projected by 2018



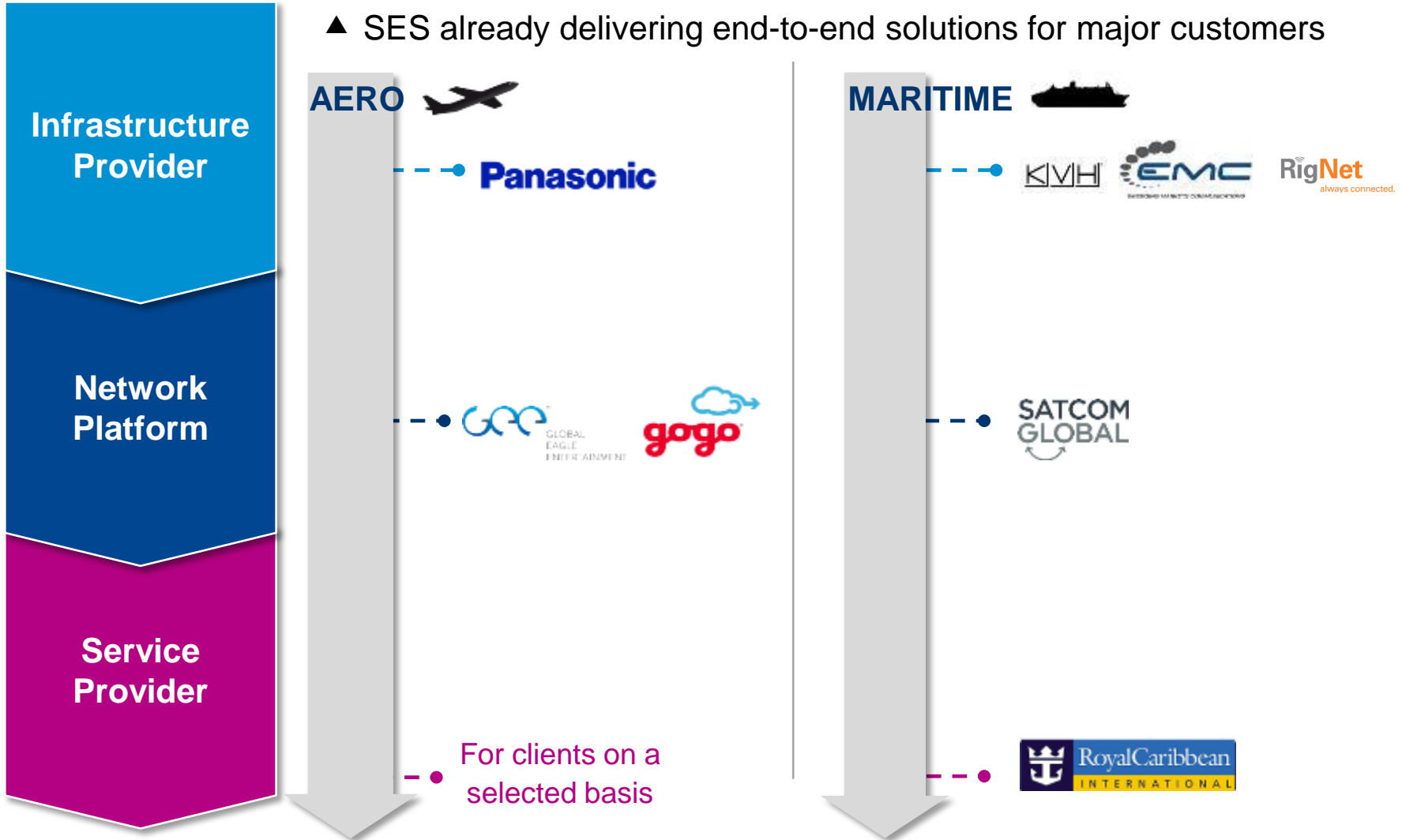
Supporting global service providers/companies





Delivering differentiated, holistic solutions using SES' GEO and O3b

▲ SES already delivering end-to-end solutions for major customers





Case study: SES's differentiated global in-flight solution

- ▲ SES's global aero capabilities well placed to deliver optimal IFE/IFC solutions



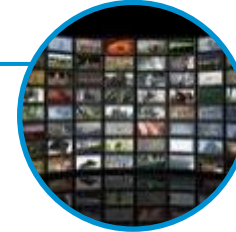
In-flight connectivity

- ▲ HD video streaming
- ▲ Browsing
- ▲ E-mail
- ▲ VPN access
- ▲ Social networking
- ▲ Video conferencing



Safety/operational and emergency services

- ▲ Electronic flight bags
- ▲ Advanced weather reporting
- ▲ Dynamic routing advice
- ▲ Cabin crew assistance
- ▲ Flight tracking
- ▲ Collection and storage of sensitive flight data



In-flight entertainment

- ▲ Live TV
- ▲ On-demand TV
- ▲ Tailored sports packages
- ▲ Regionalised news feeds
- ▲ HD+ Aero



Case study: Delivering seamless connectivity with SES Maritime+

Leisure



Gilat 60cm

- Lower throughput requirements
- Integrated ACU, GPS, LNB, BUC, Modem
- Gilat Skyedge

Merchant



Intellian 1m

- Medium throughput requirements
- GPS, ABS, Fast switching
- iDirect Velocity

Cruise



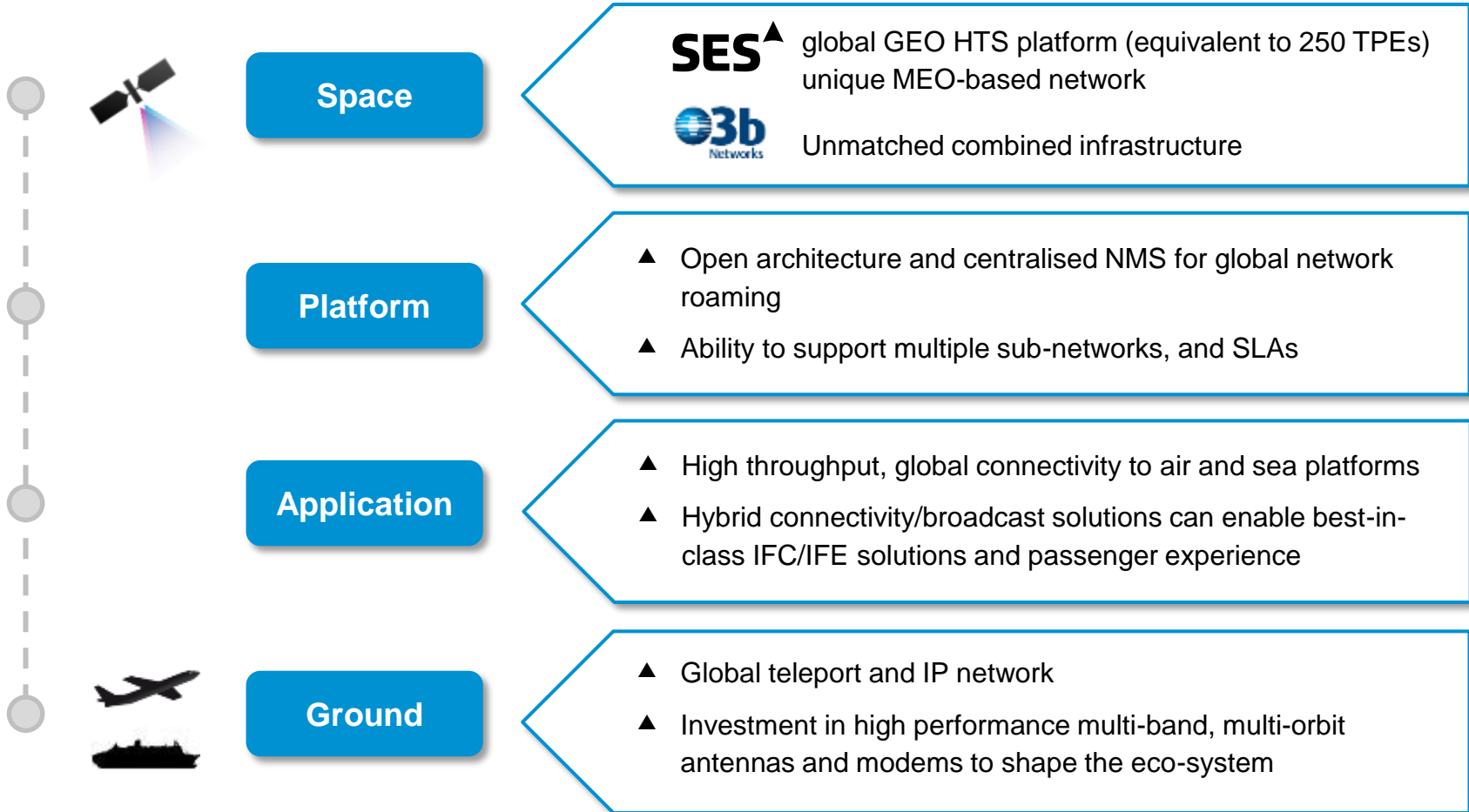
Seatel 2.4m

- High throughput requirements
- GPS, Auto Polarization, C and Ku-Band LNB
- Comtech Heights

- ▲ Customised connectivity solutions using best mix of technologies for specific users
- ▲ Multi platform offerings including iDirect, Gilat, Comtech
- ▲ Cooperation with manufacturers on new antenna development (flat panel, tri-band, GEO/MEO)



Shaping the future by innovating at all levels



Accelerating SES's future-proof differentiation

Three key principles:

Distinct infrastructure to holistic solution

- ▲ Combining wide-beam infrastructure, with new GEO-HTS and O3b to create a unique value proposition
- ▲ Targeting cruise sector with hybrid offering support high user-demand, while ensuring network resiliency and seasonality

Yield management to value management

- ▲ Creating a unified platform to deliver value
- ▲ Driving higher value per vessel/aircraft and simultaneously allowing SES to optimise network efficiency
- ▲ 20-30% of SES HTS already pre-committed, two years ahead of OSD

Relevance to resilience

- ▲ Customisation of infrastructure to best meet client needs in terms of coverage and power-density
- ▲ Ownership of the network/platform and having a direct relationship with ship-owners and airlines ensures de-commoditisation