

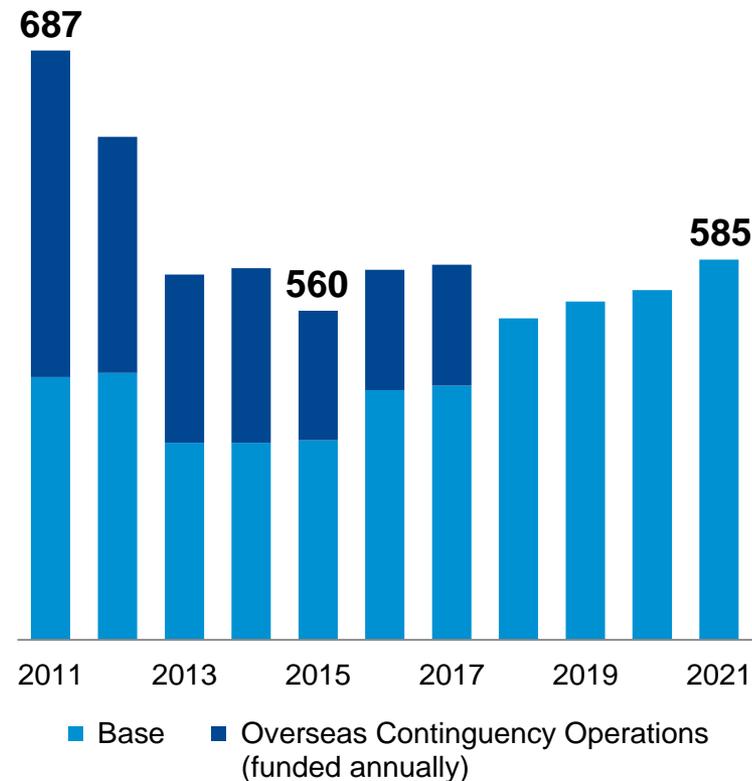
SES's growth markets: U.S. government

Pete Hoene, CEO of SES Government Solutions

U.S. government defense spending and SES GS performance

U.S. Defense budget⁽¹⁾

USD billion



▲ U.S. government budget stabilising

- Most of cuts occurred in 2012-2015, but Budget will remain tight through to 2017
- Overseas Contingency Operations Funding augments DoD base funding; future value to be determined
- Some relief in 2016-17 from sequestration threat
- While Presidential election introduces some uncertainty, overall outlook is favorable

▲ SES GS delivered robust performance in a competitive, budget constrained environment

- Gained market share and increasing sales over last five years
- Expanding and diversifying SES GS's portfolio
 - Hosted payloads
 - End-to-end solutions
 - Managed services

1) Source: US DoD



Scalable strategy serving USG SATCOM requirements

Distribution of U.S. government SATCOM pipeline/demand

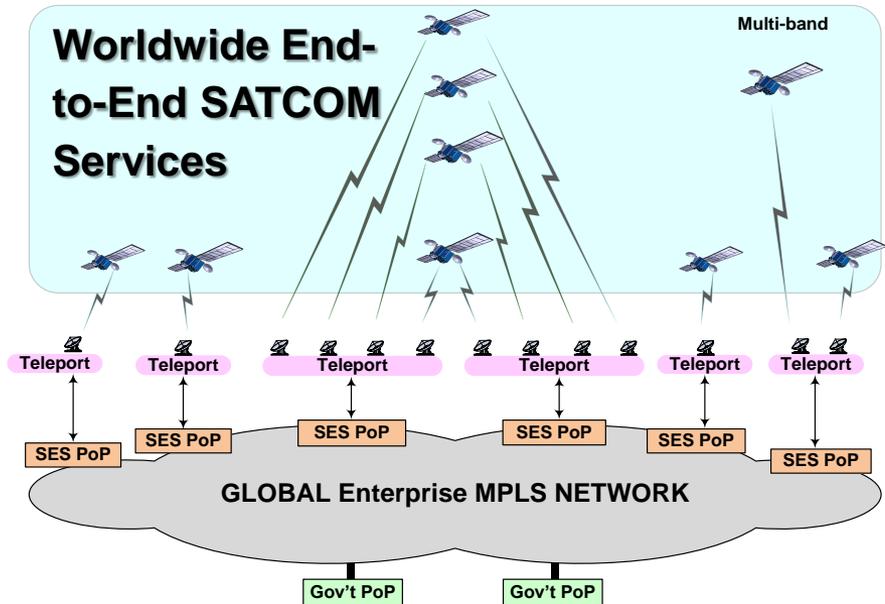


- ▲ Supporting U.S. government missions worldwide
 - Securing significant new business and have a robust pipeline of opportunities
- ▲ Underlying demand is strong globally
- ▲ Core business remains stable with benefit of diversified portfolio





Delivering differentiated, holistic solutions



- ▲ SES GS delivered **Trojan solution** to address US Army Intelligence & Security Command (INSCOM) requirements
- ▲ **Key elements** of **Trojan** solution include:
 - Worldwide, multi-band end-to-end managed services
 - Self-healing terrestrial network provides end users with access to SES global fleet and teleport infrastructure
 - Centralised network management in SES GS's NOC
 - Customised network and bandwidth management tools



Delivering differentiated, holistic solutions

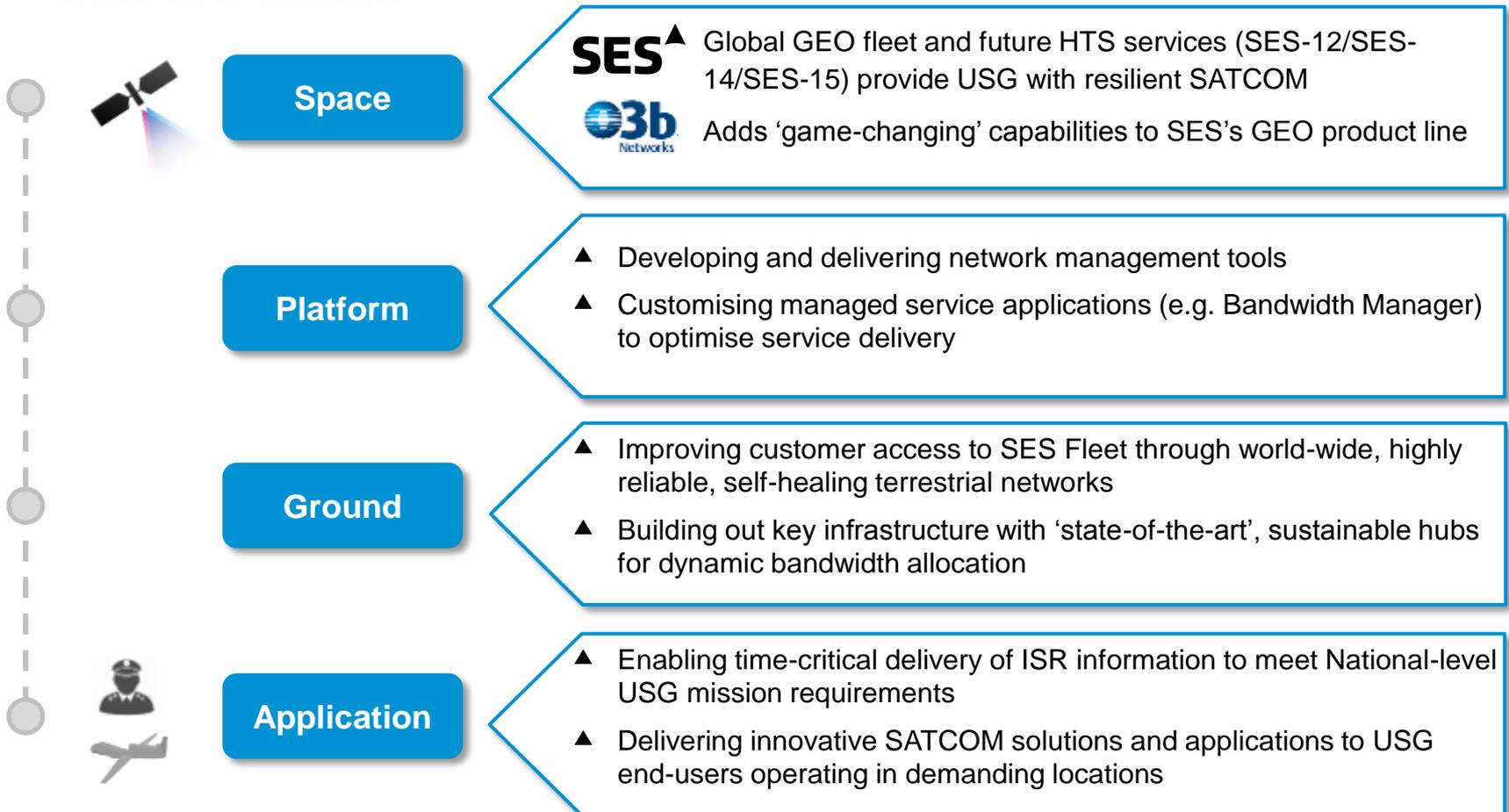


- ▲ **NWS Office Pago Pago** requested SES GS deliver O3b solution to American Samoa to support tropical weather alerts and warnings
- ▲ **Key requirement:** replace unreliable terrestrial link
- ▲ **Delivered solution**
 - Managed O3b service providing high-speed data connection between NWSO Pago Pago and primary Pacific NWS center in Hawaii
 - 5 x 5 Mbps using 2.4M GD antennas with room to grow
 - Radomes rated to 200 mph to protect antennas



Shaping the future by innovating at all levels

▲ Improving SATCOM performance, maximising operational availability and delivering world-class solutions



Accelerating SES's future-proof differentiation

Three key principles:

Distinct infrastructure to holistic solution

- ▲ Evolution of stand-alone, highly customised networks to enterprise, end-to-end solutions addressing multiple customer requirements (e.g. transition of **US Army's Trojan network**)
- ▲ Shaping acquisition strategy to use procurement dollars for COMSATCOM - buy as critical infrastructure vs. commodity

Yield management to value management

- ▲ Diversifying and expanding SES's portfolio to include hosted payloads, complex end-to-end solutions and managed services
- ▲ Leveraging deep understanding of USG customers and missions to provide leading edge solutions

Relevance to resilience

- ▲ Government Affairs efforts are shaping Congressional language and future USG architectures to enable USG resilience and ensure operations in a contested/congested space environment
- ▲ Evolving from single threaded, unreliable customised ground infrastructure to highly reliable self-healing networks