
GROWTH THROUGH ENHANCED CUSTOMER EXPERIENCE

Steve Collar, CEO of SES Networks



BlueSky 4G in the Cook Islands



**A SNAPSHOT
OF THE BUSINESS**



**DELIVERING
GROWTH ACROSS
MARKET VERTICALS**



**INNOVATION AND
THE FUTURE**

SES Networks at a Glance



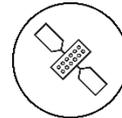
Unique global **GEO-MEO**
distributed network/architecture



99.99% measured service
availability (benchmark: 99.97%)



>300 enterprise customers,
including major tier one global clients



Up to 2 Gbps per MEO beam
with low latency (<150 ms)



Our IFC/IFC partners serve **~90%**
of total connected aircraft market



>One million cruise
passengers served each year

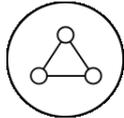
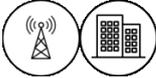


62 global government clients
served in 28 countries



13 U.S. Government agencies
served by dedicated Government team

SES Networks' Value Proposition

-  **Agility** Leading change to grow the market for satellite and deliver customer value
-  **Application Optimised Infrastructure** unique multi-frequency, multi-orbit infrastructure offering application optimised performance, speed and reach
-  **Global Scale End-to-End Solutions** Delivering Fixed data, Mobility and Government networks for end-users, globally across 130 countries with 60 satellites
-   **Strong Vertical Focus** Deep insights into the market verticals that we serve delivering the solutions that our customers demand
-  **Customer Engagement** and **Fully Managed Experience** partnering to create new markets and monetise opportunities; managing and optimising end-user experience

Growth Outlook across all Network Verticals

Fixed Data	Telco/MNO	+13 billion connected devices by 2021 ⁽¹⁾
	Cloud services	+70% managed IP traffic growth by 2020 ⁽²⁾
	Enterprise	+160% fixed internet traffic growth by 2020 ⁽²⁾
Mobility	Energy	+55,000 in-service terminals by 2021 ⁽³⁾
	Aero	+12,000 connected aircraft by 2021 ⁽³⁾
	Maritime	+7,000 connected vessels by 2021 ⁽³⁾
Government	U.S. Government	+12% U.S. Defense budget growth by 2021 ⁽⁴⁾
	Global Government	>50% increase in UAV-ISR in-service units ⁽³⁾

1) Source: Ericsson

2) Source: Cisco

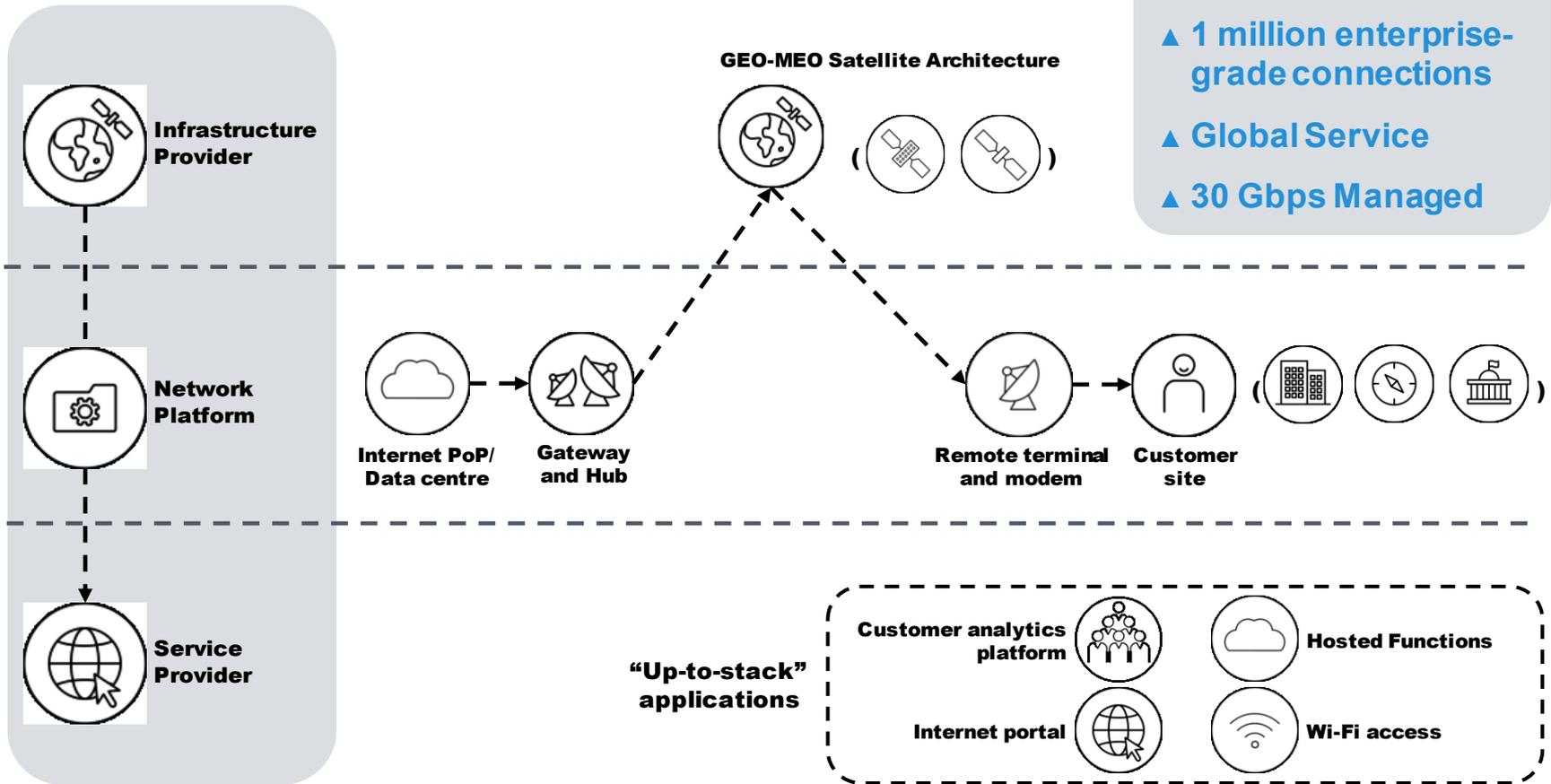
3) Source: NSR

4) Source: U.S. Department of Defense. Base budget, excluding overseas contingency operations (funded annually)

Enabling Clients with Customised, end-to-end Solutions

- ▲ Delivering tailored solutions across a wide range of growth applications
- ▲ Providing reliable and secure connectivity across the value chain

- ▲ 130 Countries Served
- ▲ >60 satellites
- ▲ 1 million enterprise-grade connections
- ▲ Global Service
- ▲ 30 Gbps Managed



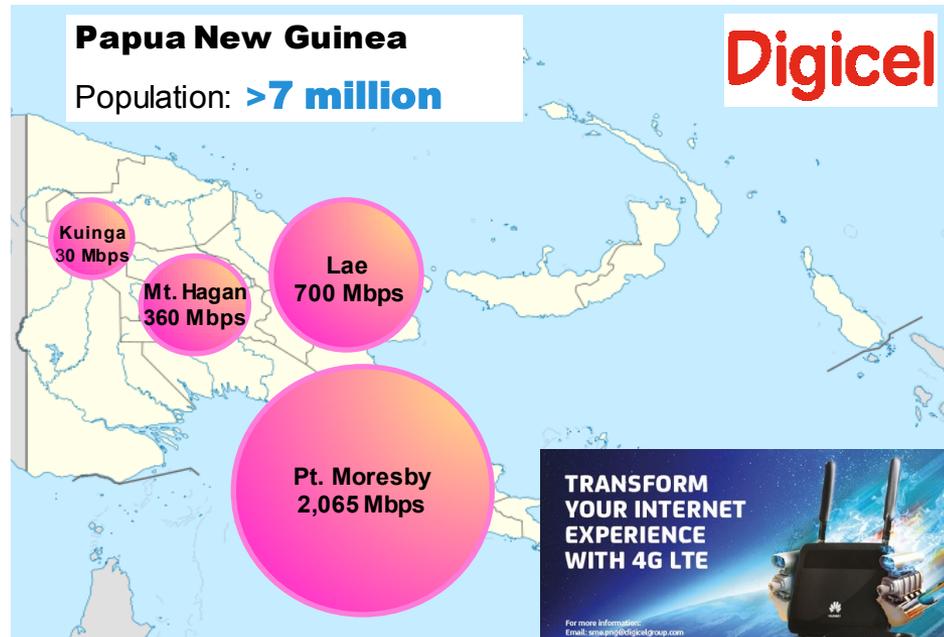
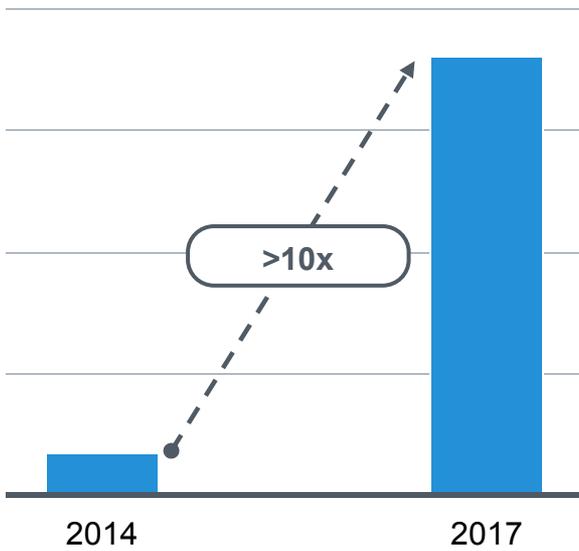


Enabling 4G With Major Telcos – Explosion of Data Demand

- ▲ Largest Telco / MNO in Pacific demanding network solutions, instead of just satellite capacity
- ▲ Delivering high performance, cost-effective solutions in 4 major population centres in PNG
- ▲ Enabling **>2x increase** in 3G subscribers nationwide and new business in mining sector
- ▲ Supporting **>40,000** LTE subscribers

Digicel MEO bandwidth

Gbps



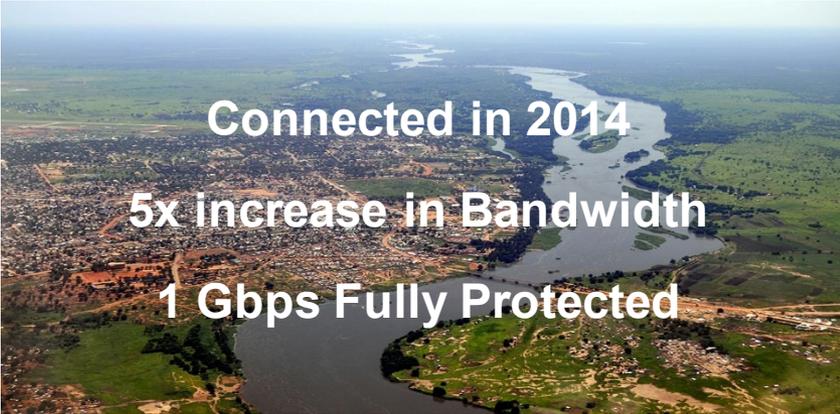
TRANSFORM YOUR INTERNET EXPERIENCE WITH 4G LTE

For more information:
Email: info@sesdigicelgroup.com
Complete solutions for your needs

Digicel | BUSINESS



Connecting Africa - One Story at a Time



Juba



Mogadishu



N'Djamena

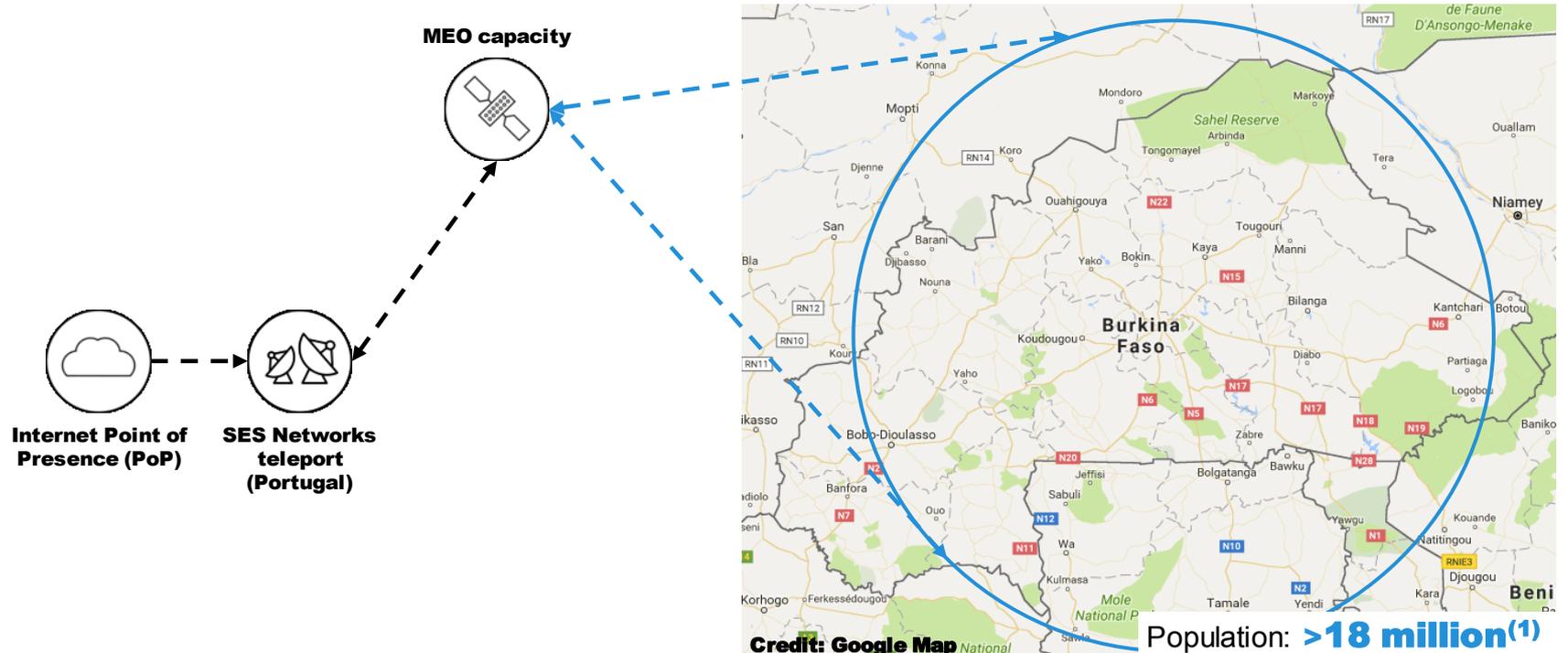


Entebbe



Delivering Core Infrastructure supporting Nation Building

- ▲ Turnkey, fully managed hybrid (satellite and terrestrial) network in Burkina Faso
- ▲ Expanding ICT infrastructure, capabilities and performance across the country



 **>60** PTP links

 **>100** base stations

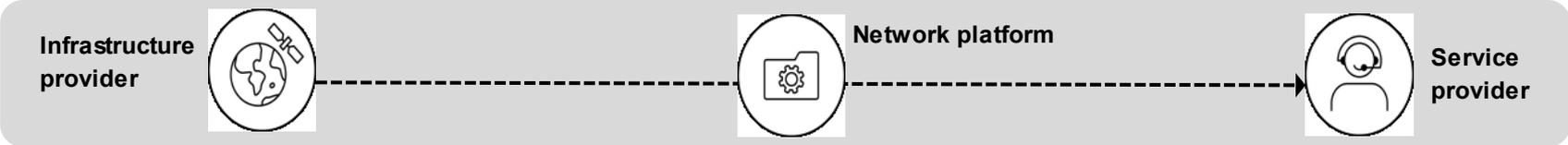
 **>880** connected sites

 **>40** connected institutions

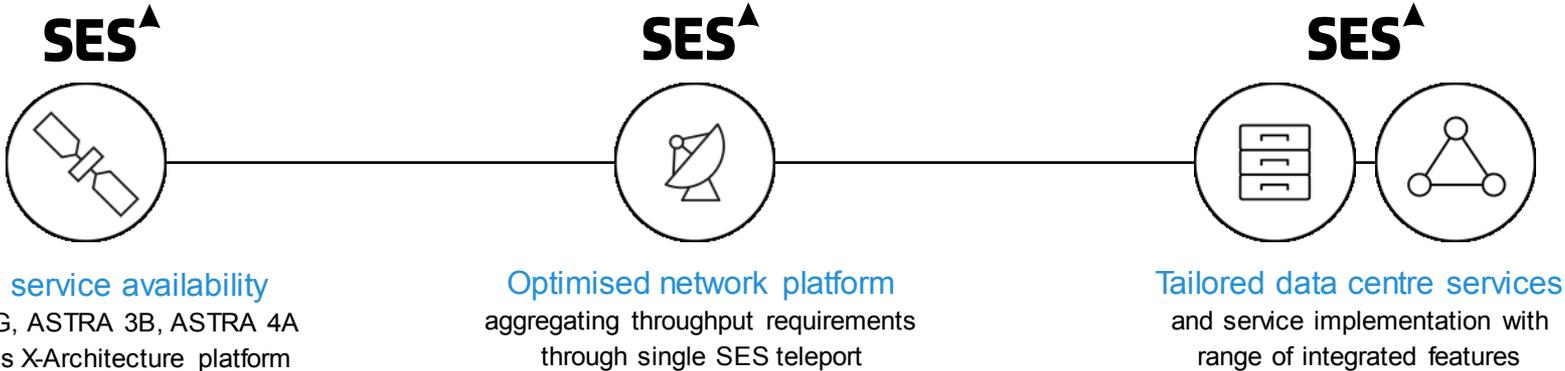
1) Source: World Bank



Expanding Turnkey Solutions for Global Cloud-based Services



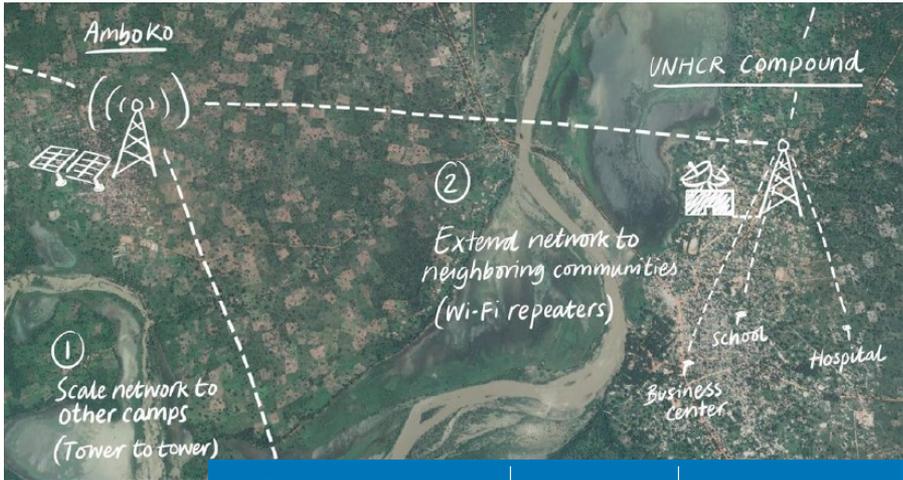
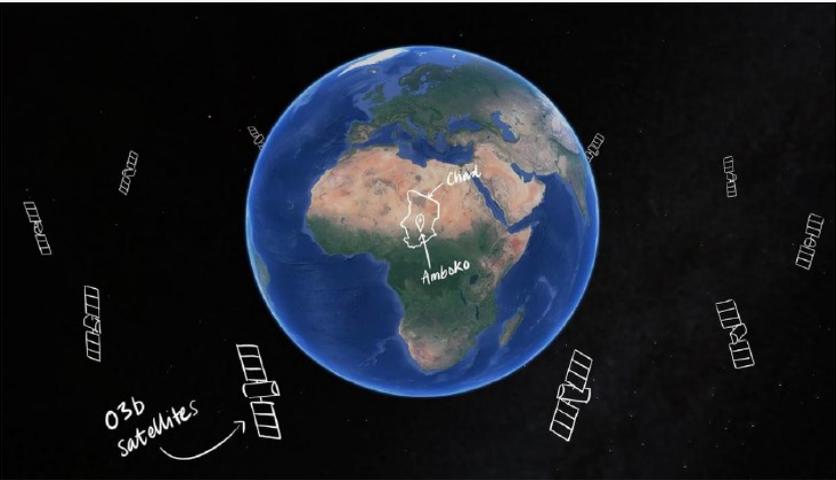
▲  Providing a complete solution that brings internet services to Sub-Saharan Africa



▲ Expanding future capabilities with flexible and scalable SES GEO and O3b MEO HTS solutions

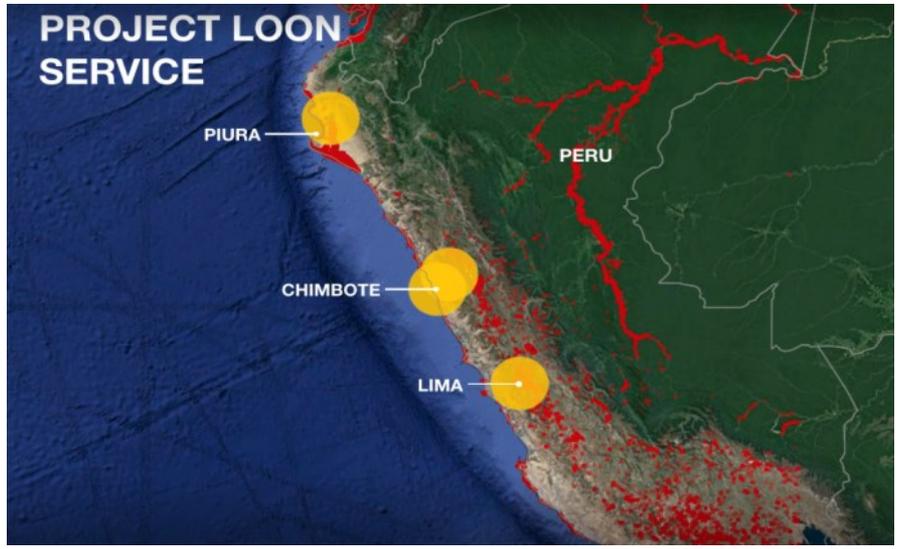


Connecting the Unconnected - A Force for Good





Response + Performance = Impact

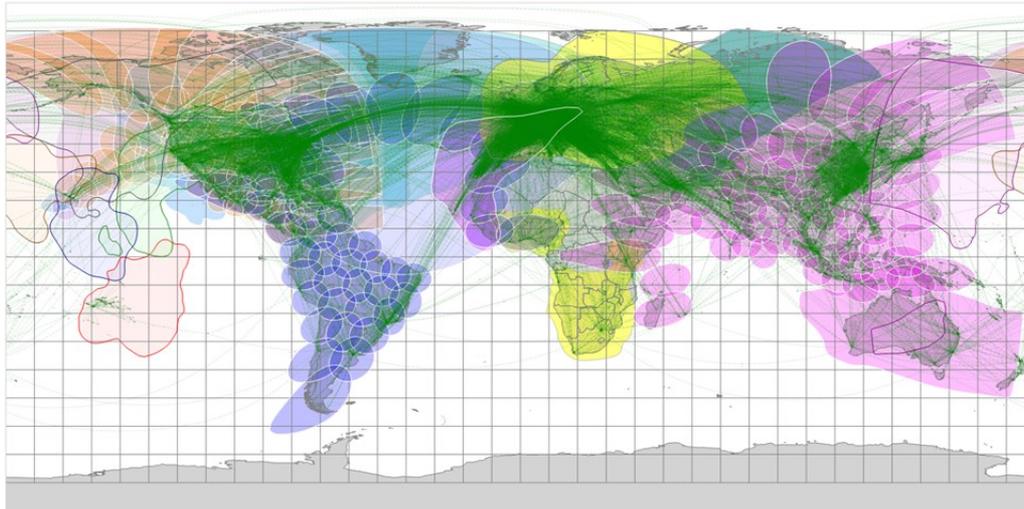




Project Loon



Strategically Positioned With all IFC/IFE Service Providers



- ▲ SES Networks has been extremely successful to date in driving the growth in aero-mobility through investment in dedicated and specialised payloads, capitalising ahead of the competition
- ▲ Around USD one billion in secured backlog with all four of the leading IFC/IFE service providers
- ▲ Substantial opportunities in the aeronautical segment remain with aircraft penetration rate increasing from ~25% today to >60% by 2026

Commercial Aero Backlog

Around USD 1 billion

Satellites Accessed

>20

Airlines Served

>15

Service provider served

Global Eagle



THALES

Panasonic
Panasonic Avionics Corporation

ENABLING NEXT GENERATION INFLIGHT CONNECTIVITY AND ENTERTAINMENT

Panasonic

Panasonic Avionics Corporation

Commercial flight hours

- ▲ Delivering an entertainment experience to **>500 million passengers** every year

SES[^]

- ▲ Global connectivity network, including optimised HTS payloads, ensuring ubiquitous coverage
- ▲ 'Home-equivalent' connectivity experience
- ▲ Enabling **95%** of Lufthansa passengers to watch live-stream of World Cup Finals and Super Bowl





Panasonic



Enhancing Passenger Experiences Through Partnerships

▲ Developing smart IFC/IFE solution for **THALES** using five key principles:

1	Collaborative processes	▲ Working closely with Thales to design HTS satellite to support delivery of FlytLIVE inflight connectivity and streaming services
2	Tailored coverage	▲ Designing HTS payload specifically for aero mobility throughout the Americas to fully meet Thales' service requirements
3	Customised service	▲ Providing specialised service packages
4	Diverse fleet options	▲ Enabling roll-out of services in 2017 using existing network
5	Open architecture	▲ Driving collaboration and innovation at every level

▲ Total commitment represents **significant share of expected investment** in SES-17

A DIFFERENTIATED INNOVATOR

Expanding leadership in the maritime growth markets of Caribbean & Asia

AN INNOVATORS DREAM – CRUISE

- ▲ Unrivalled connectivity > 1 Gbps to a single cruise ship
- ▲ Benefitting more than 1 million passengers a year
- ▲ Fully integrated service offering
- ▲ Benefitting leading cruise lines globally

FIT FOR PURPOSE – MERCHANT

- ▲ Fully managed Maritime+ service, highest reliability
- ▲ Benefitting critical communications workers at sea
- ▲ Launch of volume-based service offering driving adoption
- ▲ Network of Channel Partners guarantee global service level

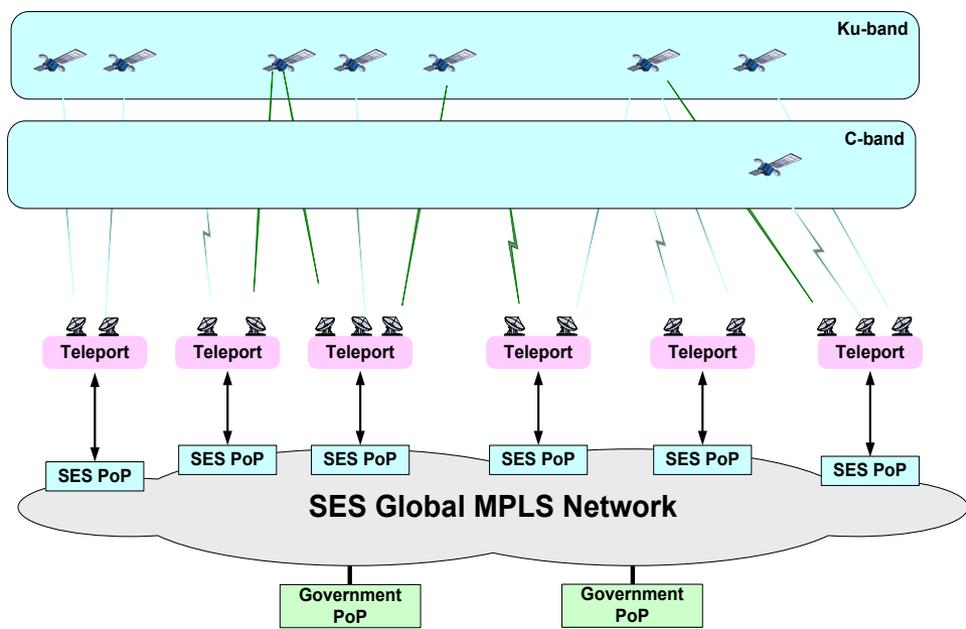


Delivering Turnkey Solutions to U.S. Army through TROJAN

▲ SES GS's TROJAN program is a managed service that meets mission critical U.S. Army Intelligence and Security Command (INSCOM) requirements:



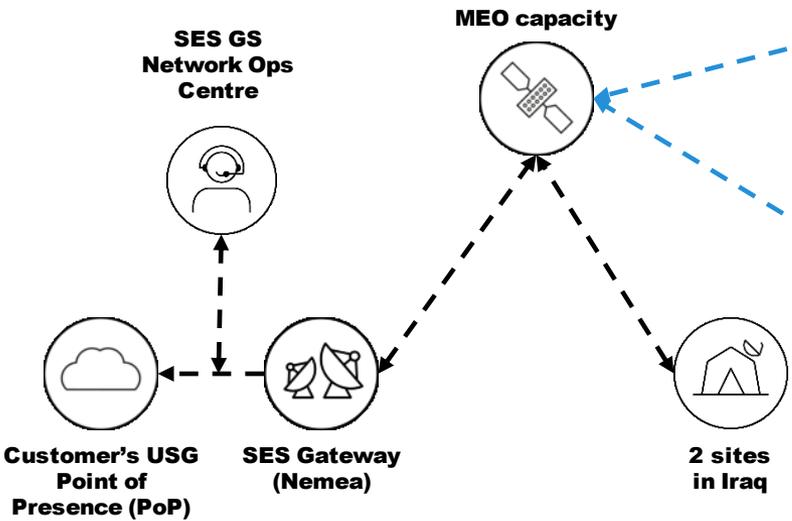
- Global, multi-band, end-to-end managed services
- Meeting Service Level Agreement
- Self-healing terrestrial network provides access to Army intelligence units
- Centralised network management in SES GS's secure NOC
- Customised monitoring and control, as well as bandwidth management tools





Differentiated Service Offering for U.S. Central Command

- ▲ SES Government Solutions has delivered two turnkey, mission-critical high-performance traffic nodes in Iraq delivering services to two different customers
- ▲ New capability enabling high speed backhaul and supporting latency sensitive applications
- ▲ End-to-end managed services delivered including leased remote terminals with 'on-site' service support and 24 x 7 secure NOC with terrestrial backhaul to U.S. DOD PoP
- ▲ Understanding the mission and shaping requirements is fundamental to shared success



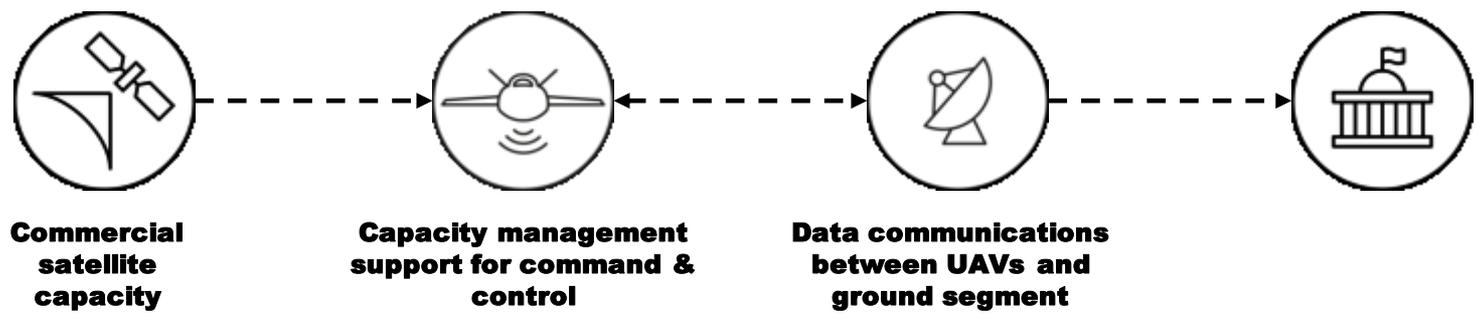


Global Government – A Long Term Growth Driver

Alliance Ground Surveillance (AGS)

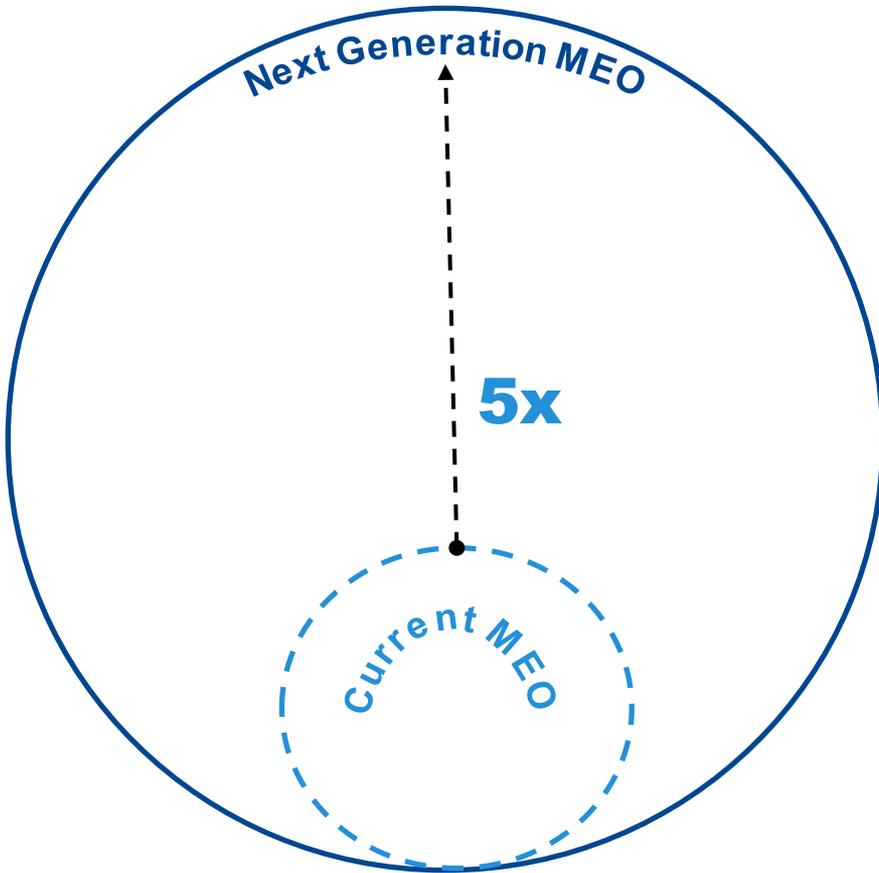
- ▲ Five Global Hawk remotely piloted aircraft
- ▲ Equipped with 'state of the art' radar technology
- ▲ Contributing to a range of civilian/defence missions
- ▲ Acquired by 15 countries (including Luxembourg)

▲ **GOV SAT** secured long-term contract for end-to-end service



Innovating Network Capabilities to Expand Growth Potential

Expanding MEO addressable market



- Next Generation MEO**
 - Small towns and remote locations
 - Remote offices
 - Data centres
 - Cloud access
 - Smaller mobile production vessels
 - Smaller cruise ships
 - Large yachts
 - Inter-regional commercial ships
 - Commercial aircraft
 - VIP aircraft
 - Multiple units in theatre
- Current MEO**
 - Small cities / towns
 - Large multi-national organisations
 - Fixed rigs/larger production vessels
 - Large cruise ships
 - Larger fixed/mobile installations

FUTURE OF THE NETWORK

Ubiquitous, broadband customer experience in all verticals and markets

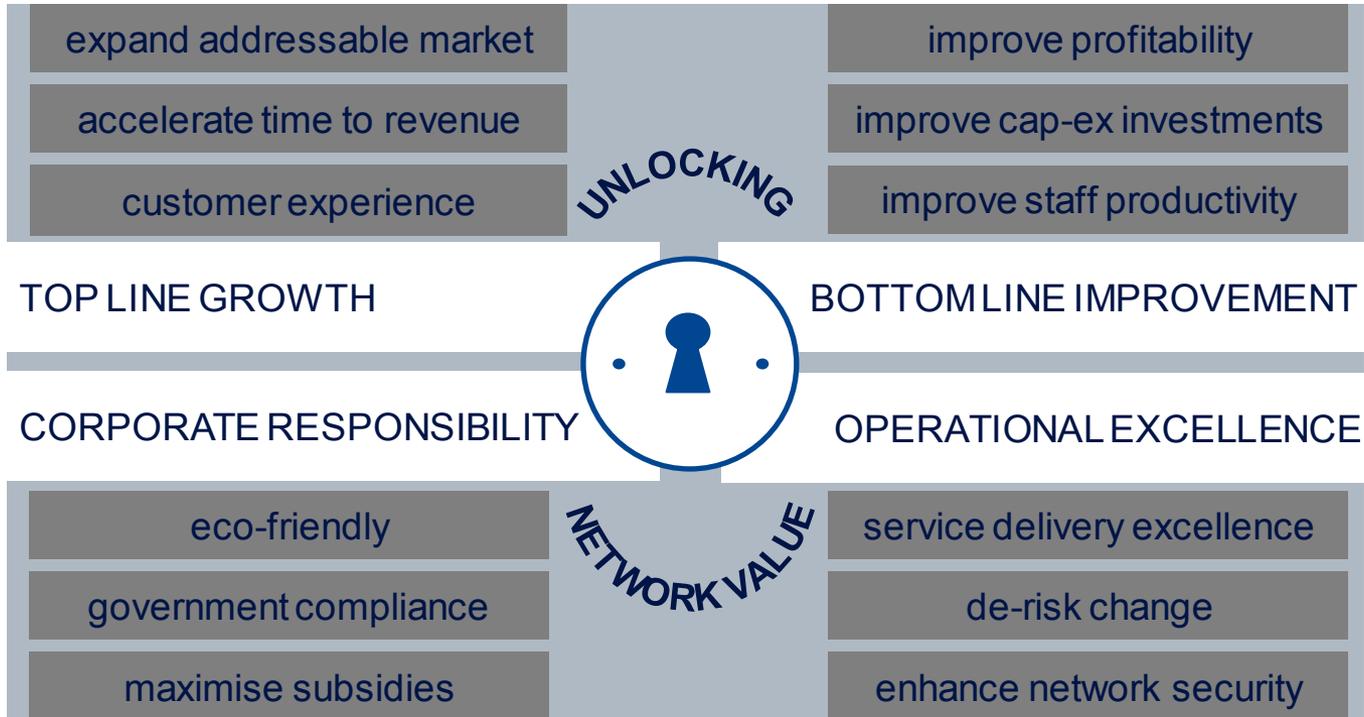
STATE OF THE ART

- ▲ Ultra-HTS - performance to support all applications
- ▲ Total flexibility in assignment of power, bandwidth, location
- ▲ Prime real estate – the best orbit with perfected spectrum
- ▲ A network that scales with the market
- ▲ State-of-the art performance with simple, proven operation

STEP CHANGE IN NETWORK SERVICE

- ▲ Massive, distributed network serving small dishes
- ▲ Serving land, air and sea, in motion or stationary
- ▲ 'From where you are to where you want to be'
- ▲ Responsive to 'elastic' demand – delivering experience

Unlocking the Value in our Customers' Networks





**A STRONG
GROWTH OUTLOOK
ACROSS OUR
MARKETS**



**DIFFERENTIATED
VALUE FOR OUR
CUSTOMERS AND
PARTNERS**



**CONTINUAL
INNOVATION FOR
LONG-TERM
SUCCESS**

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