
BOLD STRATEGY ROADMAP

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Employing an Adaptive Strategy Roadmap



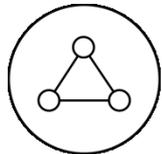
Placing **Customer-centricity** at the core



Developing an **optimised and flexible technology** model to best serve clients in each of the market verticals

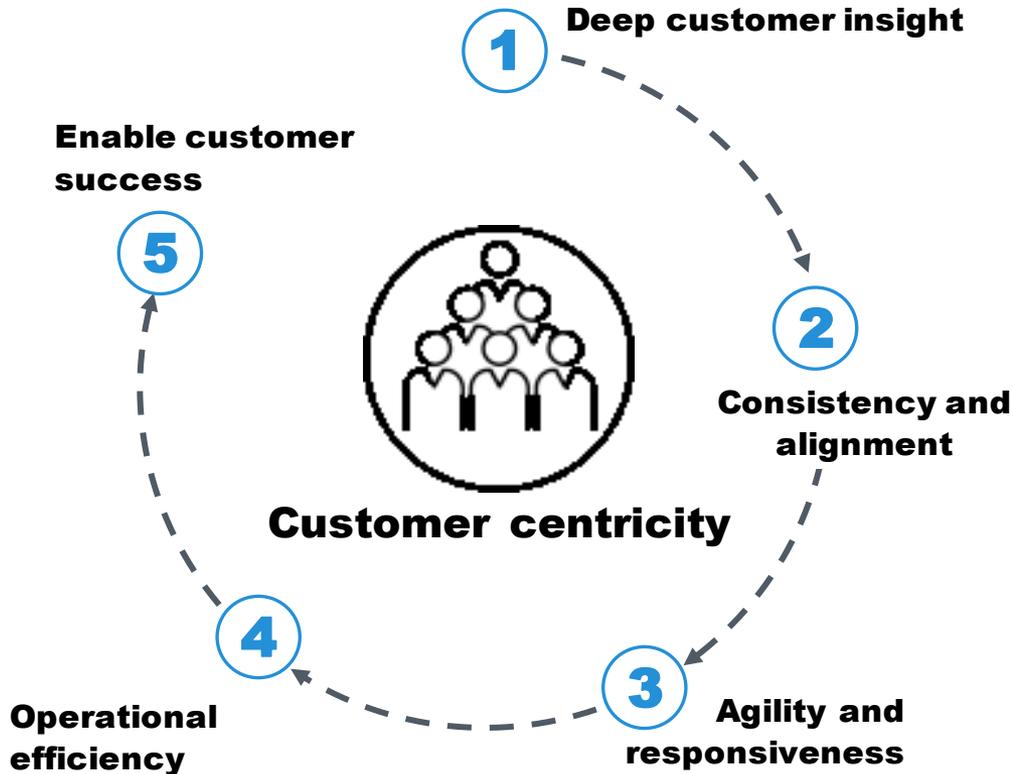


Optimised SES's business models and capability system across the value chain to build long term partnerships with customers



Shaping the ecosystem in the industry to continue to enhance, expand and innovate

Placing Customer-centricity at the Core



- ▲ **Customers** seeking for flexible and scalable solutions
- ▲ Increasingly technology agnostic and capabilities focused
- ▲ Building SES's expertise and differentiated offering

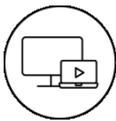
Optimising SES's Technology Model

- ▲ Providing **flexible and scalable** products and solutions
- ▲ Integrating **technology evolution** seamlessly
- ▲ **Improving economics** do drive increased usage

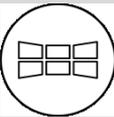
	H1 2017		H2 2017		2018/19		2020/+	
	SES-15 (hybrid)	SES-12 (hybrid)	SES- 16/ GovSat	SES-14 (hybrid)	O3b Block-3	SES-17	GEO/MEO-Next	
Payload	Shaped +HTS	Shaped +HTS + DTP	Steerable spot beams	Shaped +HTS + DTP	HTS	HTS + Full DTP	Full hybrid + Full DTP	
Segments								
Anchor	Aero IFC/IFE WAAS payload	Aero IFC/IFE	LuxGovSat for NATO	Aero IFC/IFE GOLD payload	Backhaul Maritime Government	Aero IFC/IFE		

Optimising SES's Business Model and Commercial Approach

SES Video



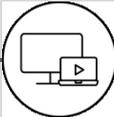
Backend provider



Infrastructure provider



Experience provider



- ▲ Enhancing viewer experiences
- ▲ Expanding video globally
- ▲ Innovating with hybrid solutions
- ▲ Any device, anytime, anywhere

SES Networks



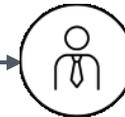
Infrastructure provider



Network platform



Service provider



- ▲ Enhancing differentiation
- ▲ Expanding network capabilities
- ▲ Innovating with services with new products and engagement
- ▲ Increasing addressable market

Shaping the Ecosystem in the Industry

▲ Shaping SES’s strategy and business model in tandem with market / industry foresights

▲ Expanded capabilities



embrace hybrid SAT/IP environment

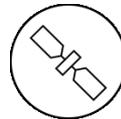


“SES+” end-to-end products

▲ Enhanced monetisation, time-to-market



Improved monetisation potential from **12** inclined orbit satellites



5 Hosted payloads: leverage fleet, to offer low cost to space and short time-to-market

▲ Bold Innovation



Venture Capital
to maximise intelligence



Start-up incubator
to test new ideas / business models

Bold Strategy Roadmap



Build a **strong capability system** to execute on our strategy presently and in the future



Lead the top four verticals with differentiated solutions that add value to our customers and enable their businesses



Establish **SES as the foremost provider** of satellite enabled communications and media solutions

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