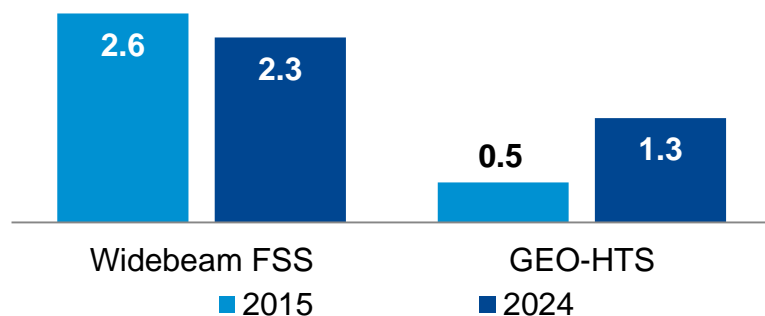


SES's growth markets: Enterprise

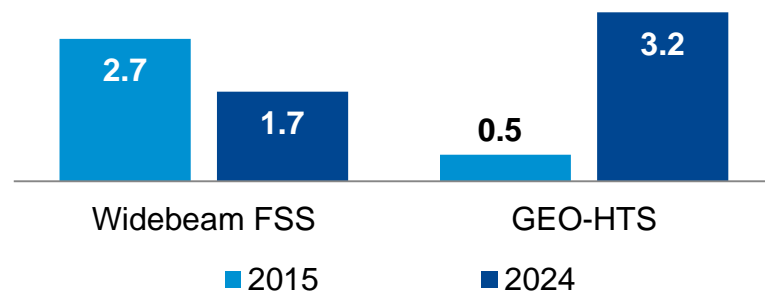
Aslan Tricha, SVP & MSC Leader for Enterprise

Strong growth potential in global enterprise

Satellite capacity revenues⁽¹⁾
USD billion



Network platform/service provider revenues⁽¹⁾
USD billion



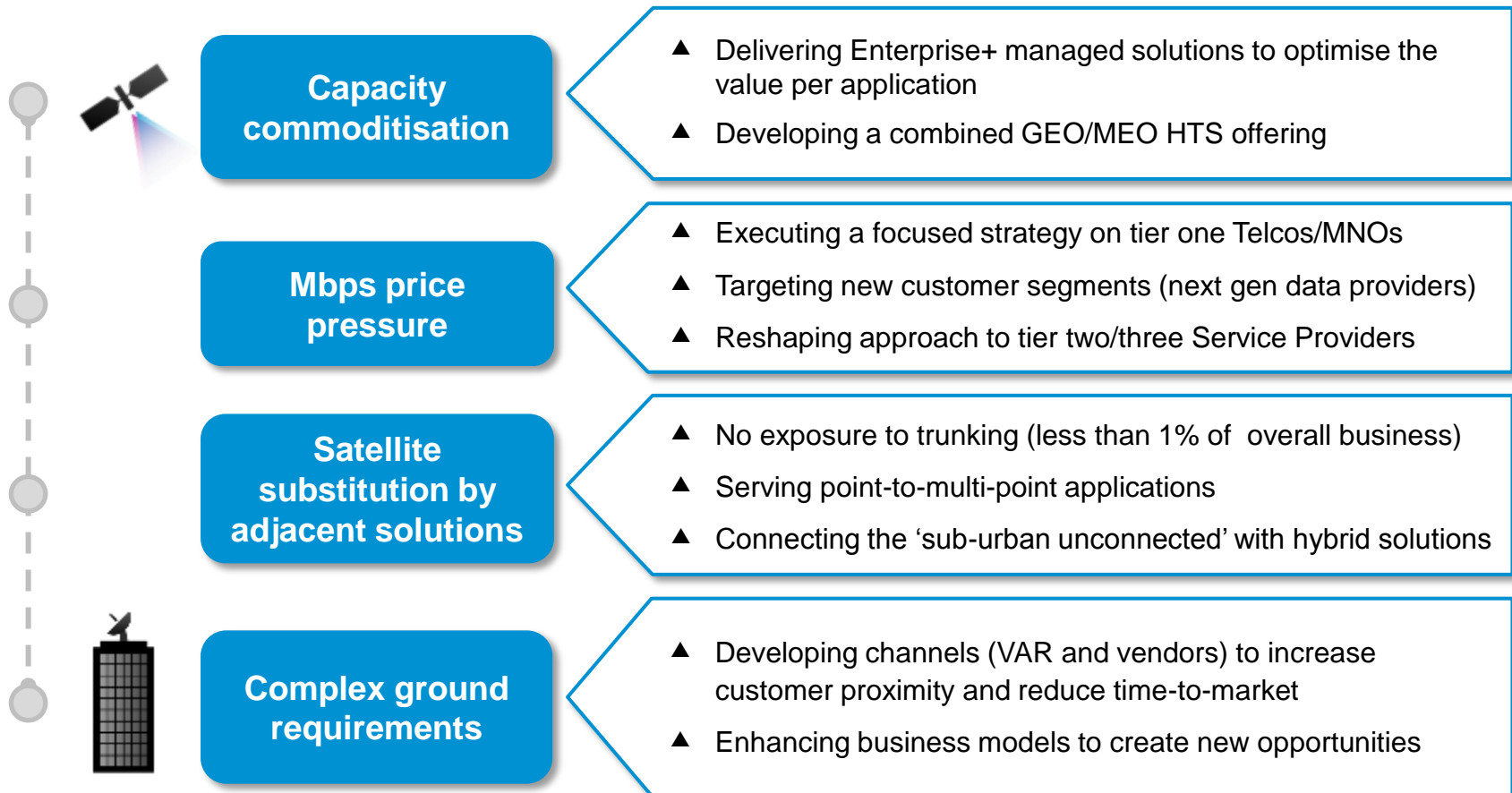
- ▲ Connectivity adoption is a growth enabler
- ▲ Satellite services growing in relevance within the global IP traffic explosion
 - Providing reach to reduce connectivity gap
 - Worldwide ICT development plans to bridge digital divide, broadband adoption, mobile broadband subscriber CAGR 15%⁽²⁾ (proliferation of 3G/4G/LTE networks)
 - Fulfilling performance requirements by application
 - Mobile traffic +45% CAGR⁽²⁾ (capacity usage per user doubling every three years)
 - Fulfilling user experience requirements with high performance networks (throughput and latency)
- ▲ Focusing on key growth applications:
 - Addressing point-to-multi-point enterprise needs
 - Extending terrestrial networks
 - Connecting the 'sub-urban unconnected'

1) Source: NSR

2) Source: Ericsson (2015-2021)

Reshaping SES's Enterprise business to changing market dynamics

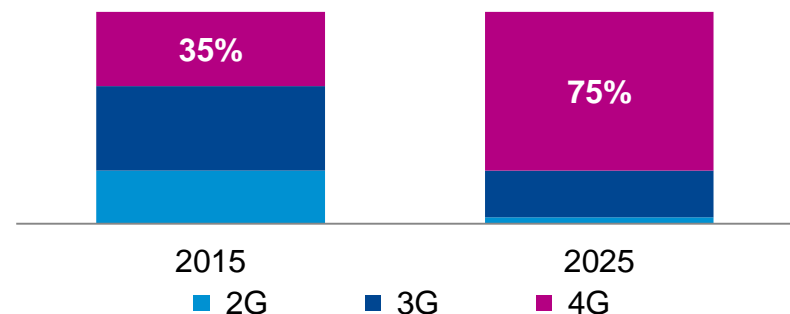
- ▲ Reshaping SES's Enterprise business with enhanced product offerings
- ▲ Expanding commercial relationships with 'tier one' telcos/MNOs and channels



Driving growth from backhaul services

Sites share by BTS technology⁽¹⁾

% of sites



▲ Monetising demand from 3G and 4G/LTE sites by providing competitive solutions with HTS

- 10 to 40 times traffic growth per site with 3G/4G/LTE, compared to 2G
- Robust solutions to handle complex network requirements and quality of experience

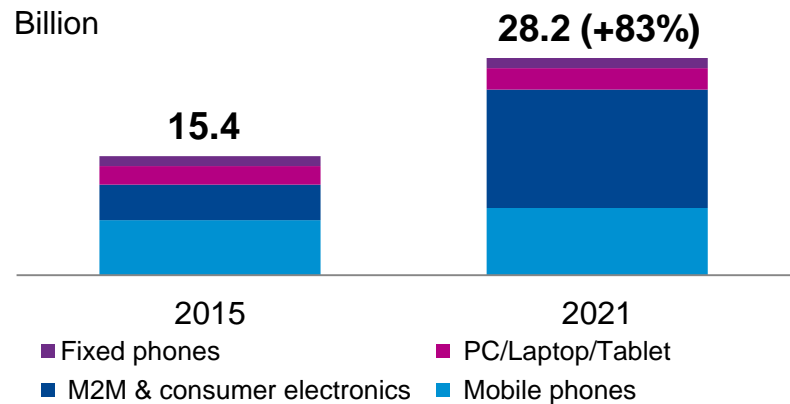
▲ Capturing growth in Internet of Things

- Connected devices to reach 28 billion by 2021
- Growing range of applications
 - Smart buildings, smart cities, smart home, smart grid, smart agriculture and smart industries
- New business models supported by falling modem costs and HTS capacity

▲ Satellite solution advantages: ubiquity, scale, security, resilience and network management

Connected devices⁽²⁾

Billion



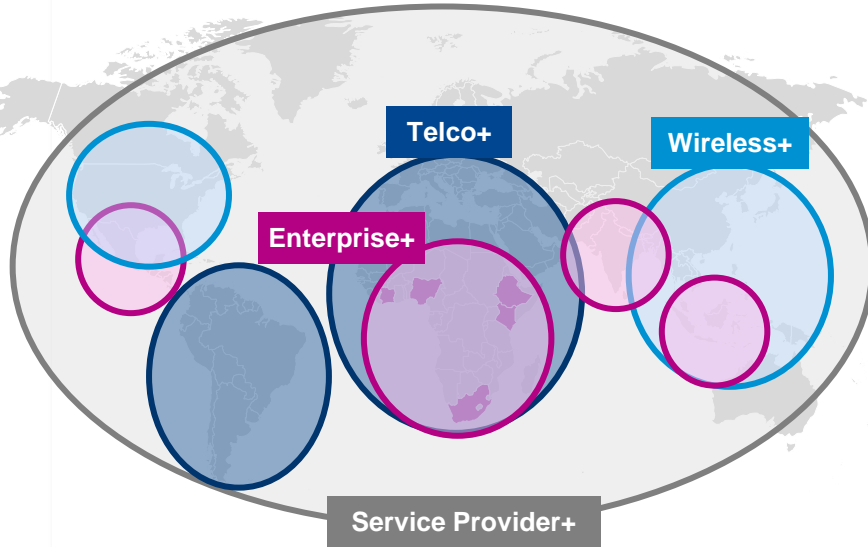
1) Source: NSR

2) Source: Ericsson



Providing scalable, global solutions

SES's global Enterprise solutions



11 SES-managed IP platforms serving Europe, Asia, Americas and Africa

Over one million simultaneous fixed internet connections supported by SES

Partnering with major global customers





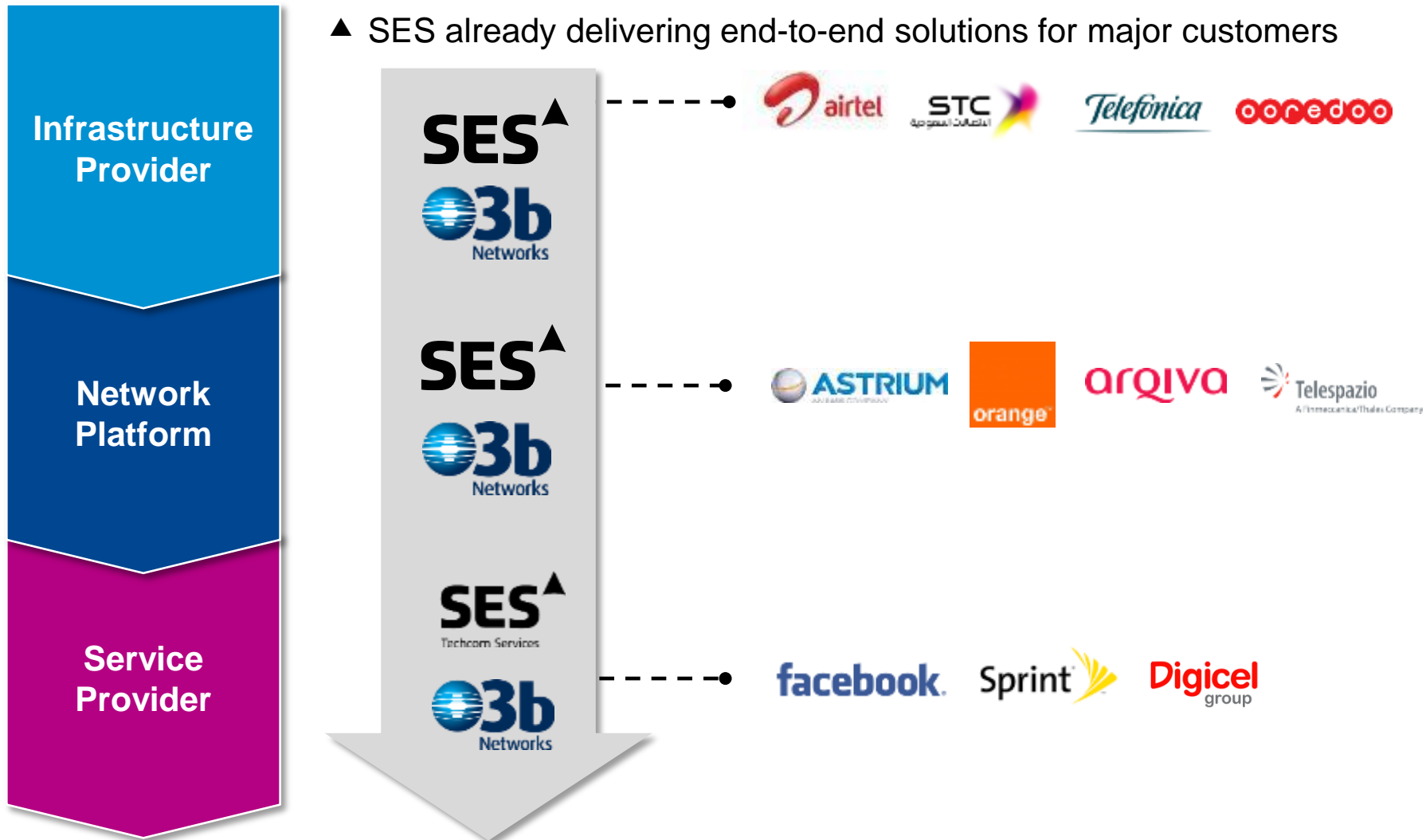
Scaling up SES's global enterprise offering

	2011	2016
1 Increasing the connectivity reach in developing markets	21% of households with internet	35% of households with internet
2 Facilitating the network proximity <ul style="list-style-type: none">- Nodes- Customer connectivity points- Network transport	15 Teleports 25 PoP L3 connectivity	25 Teleports >3,000 PoP L2 & L3 MPLS (support for MEF 2.0 services)
3 Improving application and user experience	3 Mbps average data rate per site	12 Mbps average data rate per site
4 Delivering holistic and hybrid solutions	0 hybrid platforms	6 hybrid platforms
5 Replicating the SES way of working globally	Vendor partnerships with Gilat & iDirect enhancing channels to market for Enterprise+, Telco+, Wireless+	



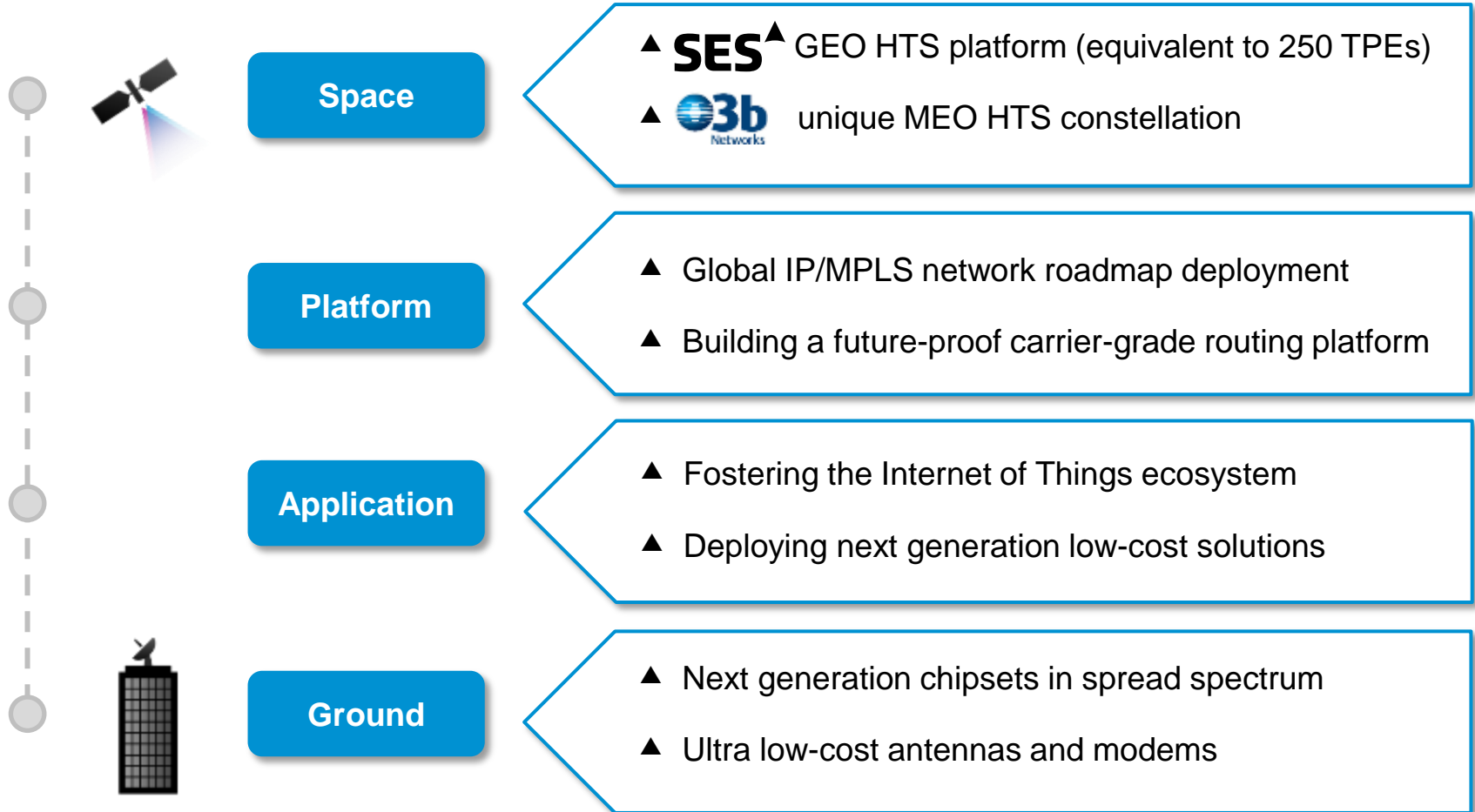
Delivering differentiated, holistic solutions

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





Shaping the future by innovating at all levels



Accelerating SES's future-proof differentiation

Three key principles:

Distinct infrastructure to holistic solution

- ▲ Investing in HTS and next gen data network capabilities
- ▲ Delivering complete suite of enterprise solutions globally
- ▲ Enhancing satellite solutions with hybrid features

Yield management to value management

- ▲ Complementing infrastructure sales with services
- ▲ Increasing revenues from tier one Telcos/MNOs and Service Providers from 36% to 42% in 2015

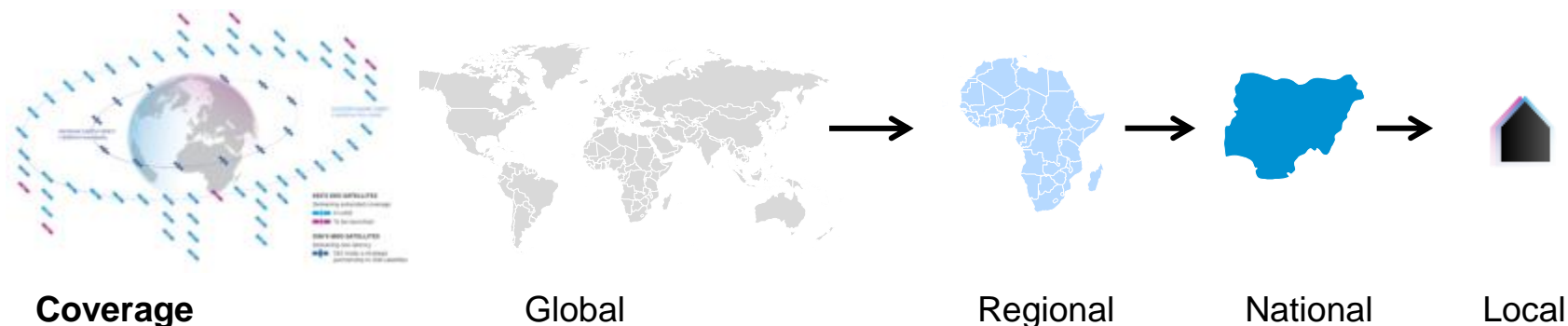


Relevance to resilience

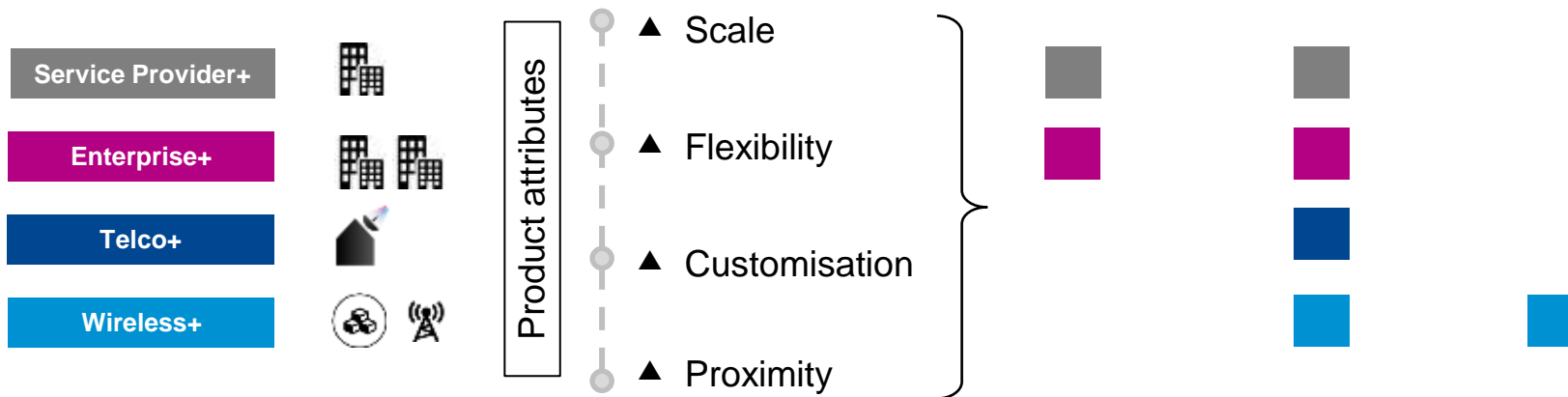
- ▲ Providing satellite services to next gen data providers
facebook.
- ▲ Delivering highest service performance (exceeding 99.97% since 2004) and fastest implementation

Providing value in delivering global enterprise solutions

▲ Delivering tailored solutions on a regional, national, and/or local level for customers



SES enterprise offerings



Case study: Providing a turnkey solution for Facebook in Africa

Task

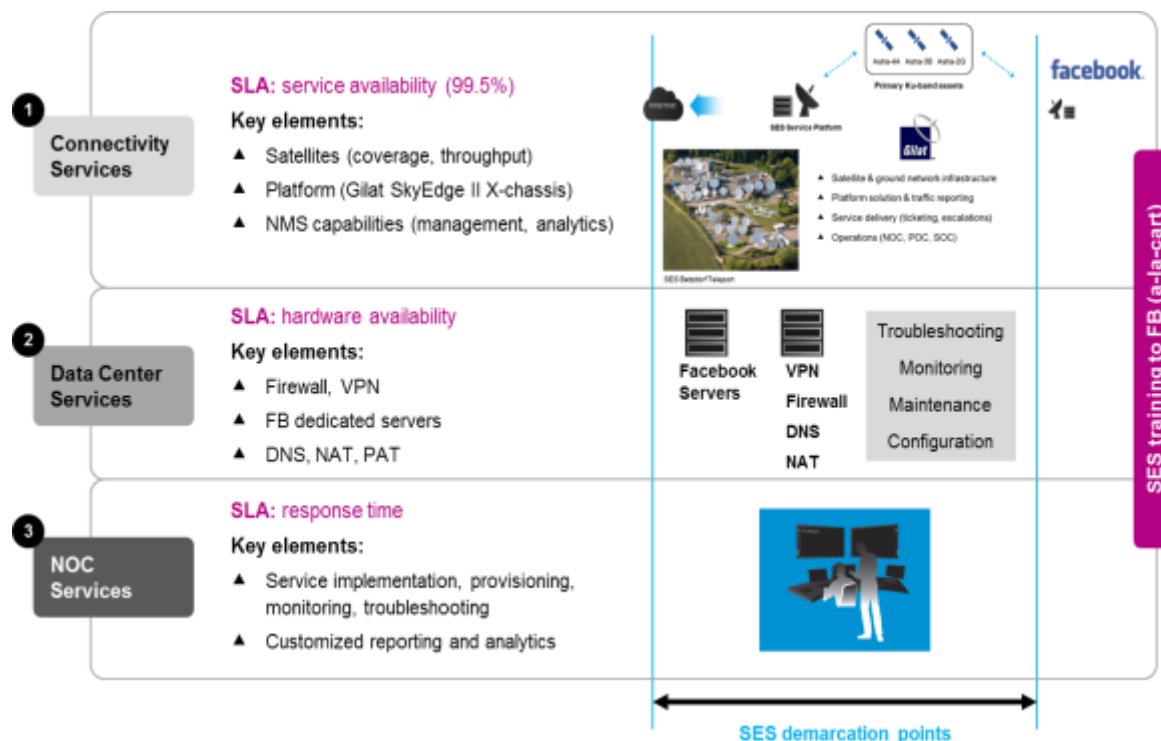
- ▲ Support Facebook's Express Wi-Fi programme roll-out in Sub-Sahara Africa

Benefit

- ▲ Complete and tailored solution deploying customer-specific protocol enhancement features

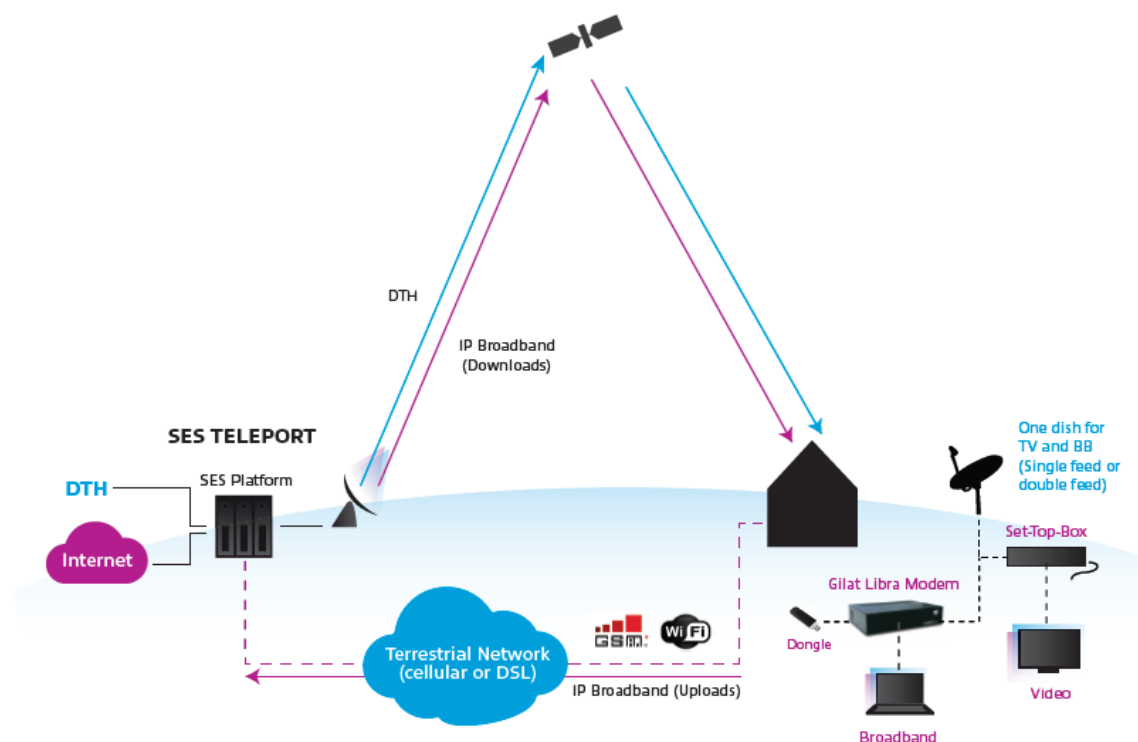
Implementation

- ▲ Simplified customer front-end solution
- ▲ Combining complex service elements in the back-end
 - Satellite and ground infrastructure
 - Managed services
- ▲ High level performance and SLA



Case study: Delivering Hybrid Broadband in Asia

- ▲ Allowing telcos/MNOs and ISPs to deliver broadband services to underserved areas, while leveraging their core network investment



- ▲ Enterprise+ Hybrid Broadband enables enhanced broadband connectivity:
 - Superior end-user experience for underserved areas (20Mbps download speeds, return carrier via 2G/3G)
 - Carrier grade infrastructure (total management system)
 - A self-installed terminal with automatic service activation
- ▲ On-going customer testing:

