



**eUTeLSAT**

# *AGNOSTIC CONTINUITY*

*A Required Model for IFC*

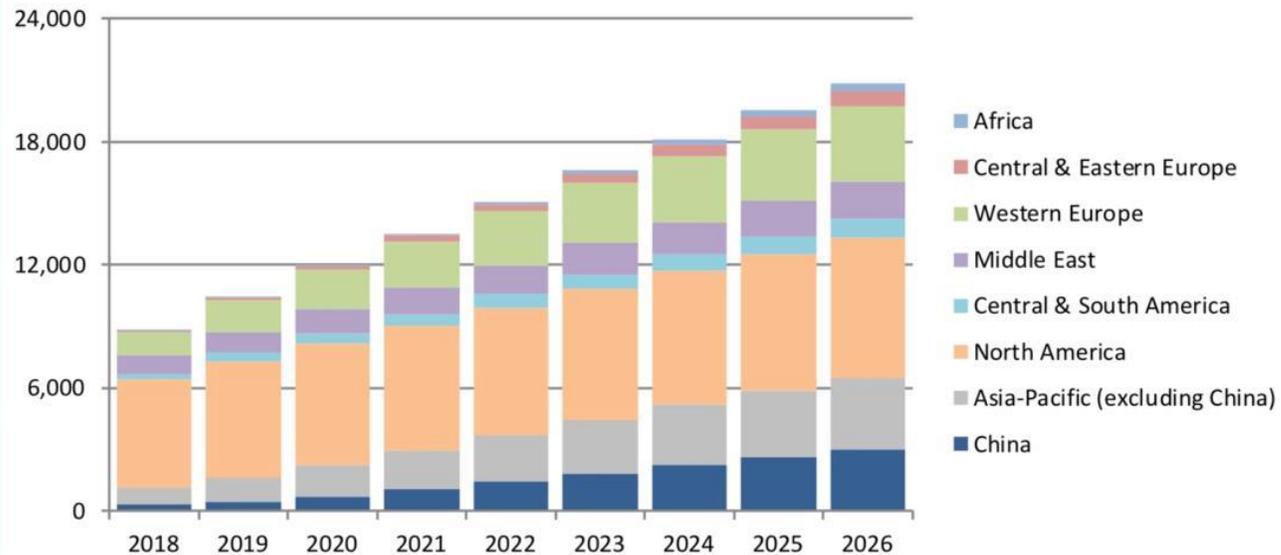
Jags Burhm, Connectivity - Aero, 08.07.2020

# SMALLER MID TERM MARKET

overall revenues likely to be lower

Total Connected Aircraft by Geographic Region

Total Connected Aircraft - 2018 to 2026

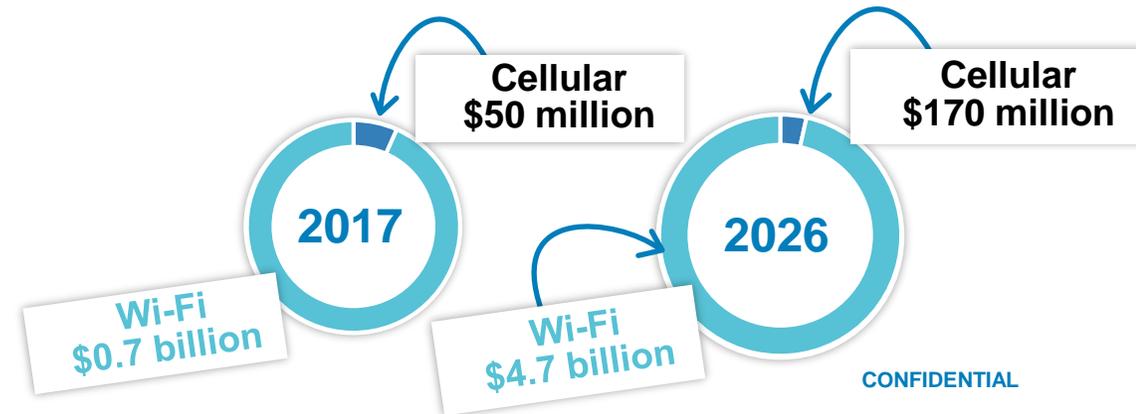


Source: Valour Consultancy

May 2018

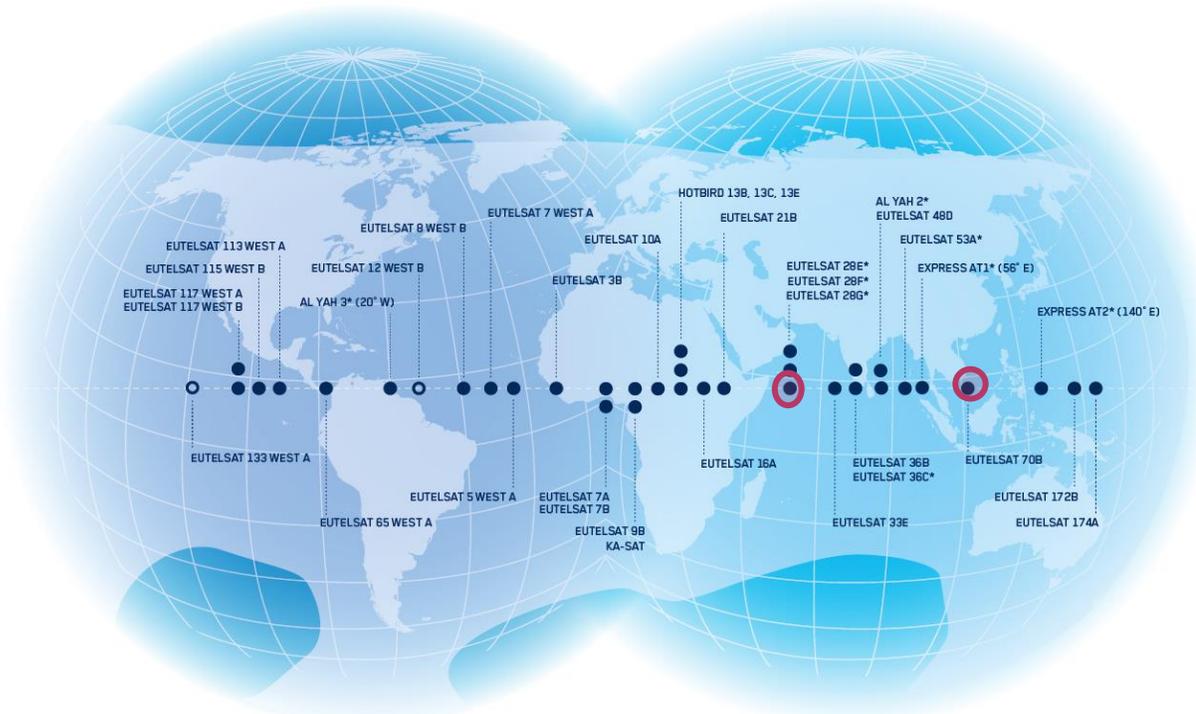
## Global Annual IFC Service Revenues

Annual service revenues paid by airlines to IFC service providers



# UPGRADE ENGAGEMENT PROCESS

deepen connectivity, locally relevant



THE EUTELSAT FLEET  
MAY 2019

- stable orbit
- inclined orbit
- capacity on third-party satellites

FUTURE SATELLITES: EUTELSAT 7C  
EUTELSAT 5 West B  
EUTELSAT QUANTUM  
KONNECT  
KONNECTVHTS  
HOTBIRD 13F  
HOTBIRD 13G

○ EUTELSAT 36A currently under redeployment

○ EUTELSAT SATELLITES  
OVER ASIA PACIFIC

## SIMPLIFY

capacity provisioning

## DEVELOP

world class orchestration engines

## SEPARATE

“hardware” from “enabled capacity”

## CREATE

flexible data plans

## DENSIFY

capacity in key areas

## ESTABLISH

key partnerships

## UPGRADE

with “Mobility relevant” satellites

# CREATE SOLUTIONS

build intimacy & grow your 'reliability' currency

## What do you provide for the Aero sector?

- Wholesale KU & KA capacity to existing IFC service providers
- Enable data & broadcast services globally
- Operating on **multiple** satellites, **multiple** gateway types & **multiple** antenna solutions

## How do you serve the client within this sector?

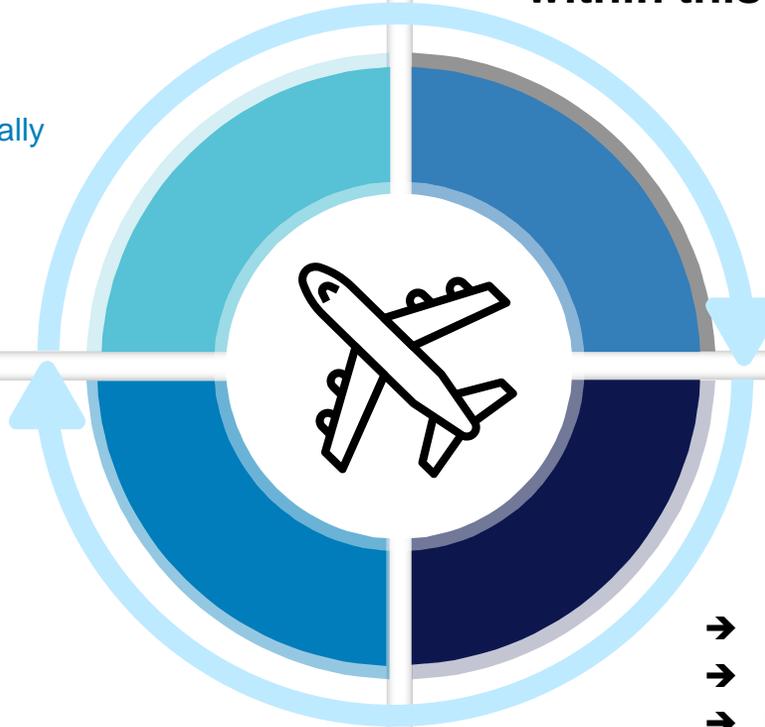
- **Assess** client demand needs for capacity
- **Create** coverage options and backups
- Provide a **comprehensive** solution of coverage options with the required SLA's

## What can you do to help my business?

- **Identify** your ideal position
- Explain how to **enter** sector
- Outline **cost** of "market entry"
- Create "roadmap" to enable "Go / No-Go"

## Can you help me understand this sector? It sounds complex...

- Provide **detailed** market overview
- **Share** latest insights and intel
- Highlight current / planned services
- Explain **key** drivers and constraints



# USE EXISTING IFC INSTALL BASE

Seamless Air Alliance approach is highly relevant

Flexible IFC model needed by airlines

**COVID-19 impact accelerating this need**

Opportunity to 're-service' equipped aircraft

**'unlock' current value chain**

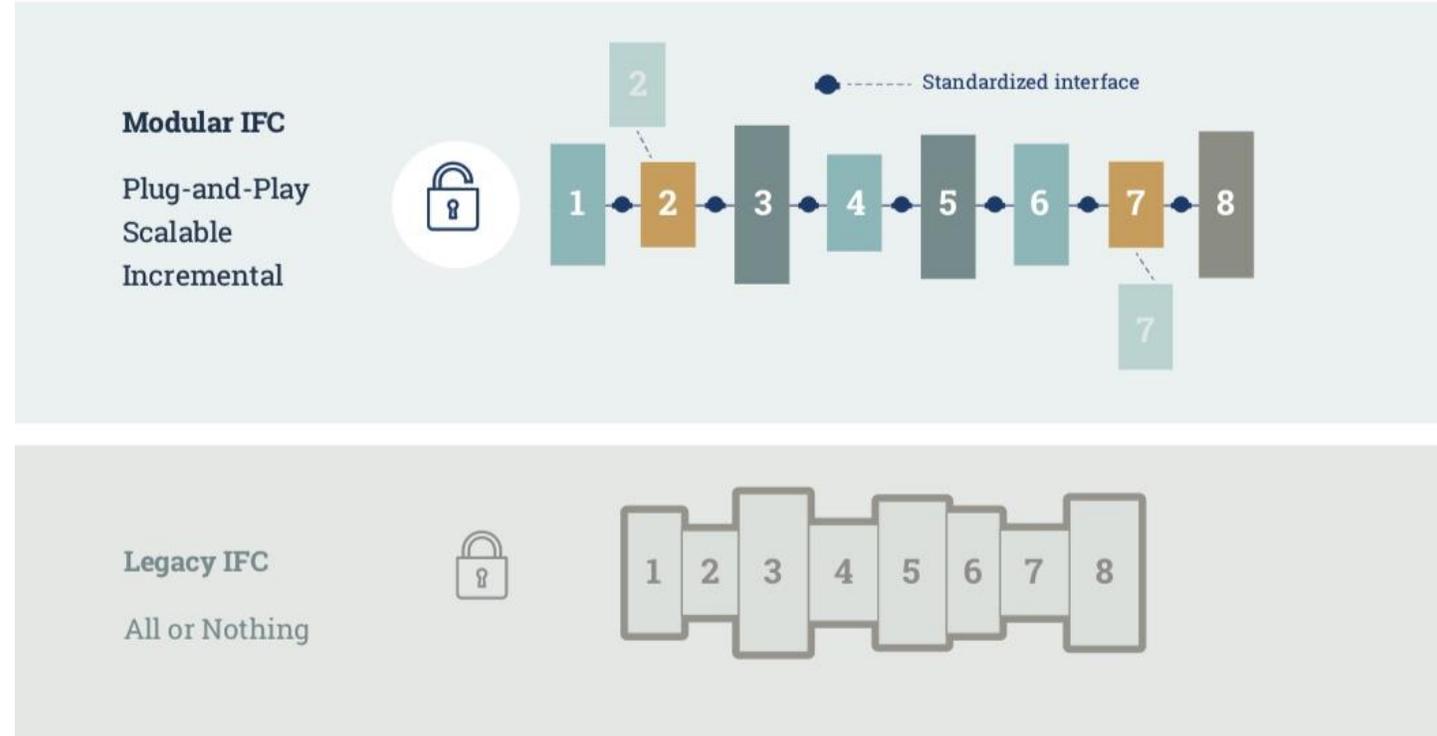
**address a clear market need driven by airlines**

**3<sup>rd</sup> party specialists available to start 'unlocking'**

**low risk strategy**

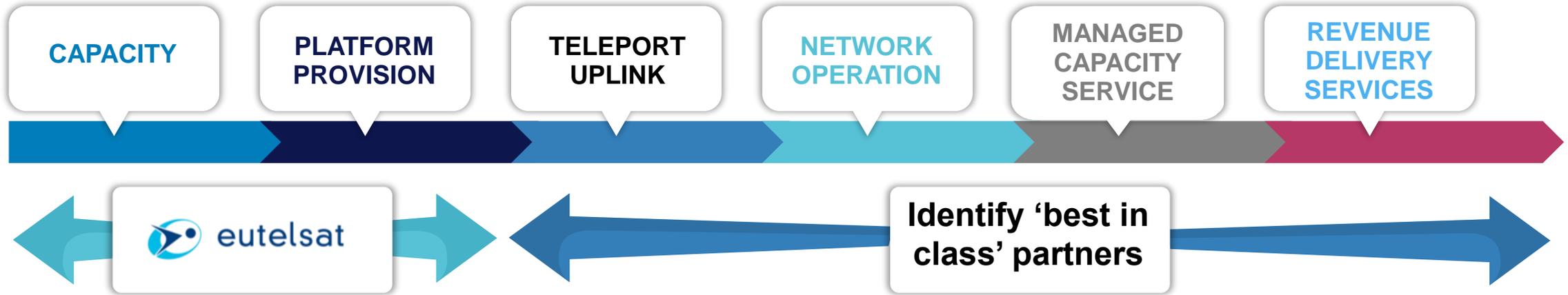
Create 'unprecedented' disruption within IFC

Minimal investment risk



# ASSESS & CLARIFY YOUR POSITION

aim for maximum relevancy within vertical



Capacity & platform provision = “natural” place for SATCOM operators

Enhanced & streamlined processes = increased engagement from IFC providers

Key partnerships = augmented capabilities

Creation of “optimum” value chain = ‘relevant’ supply options for airlines

Hardware agnostic + aggregated capacity overlay = “agile & sustainable” business model



CONTACT

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