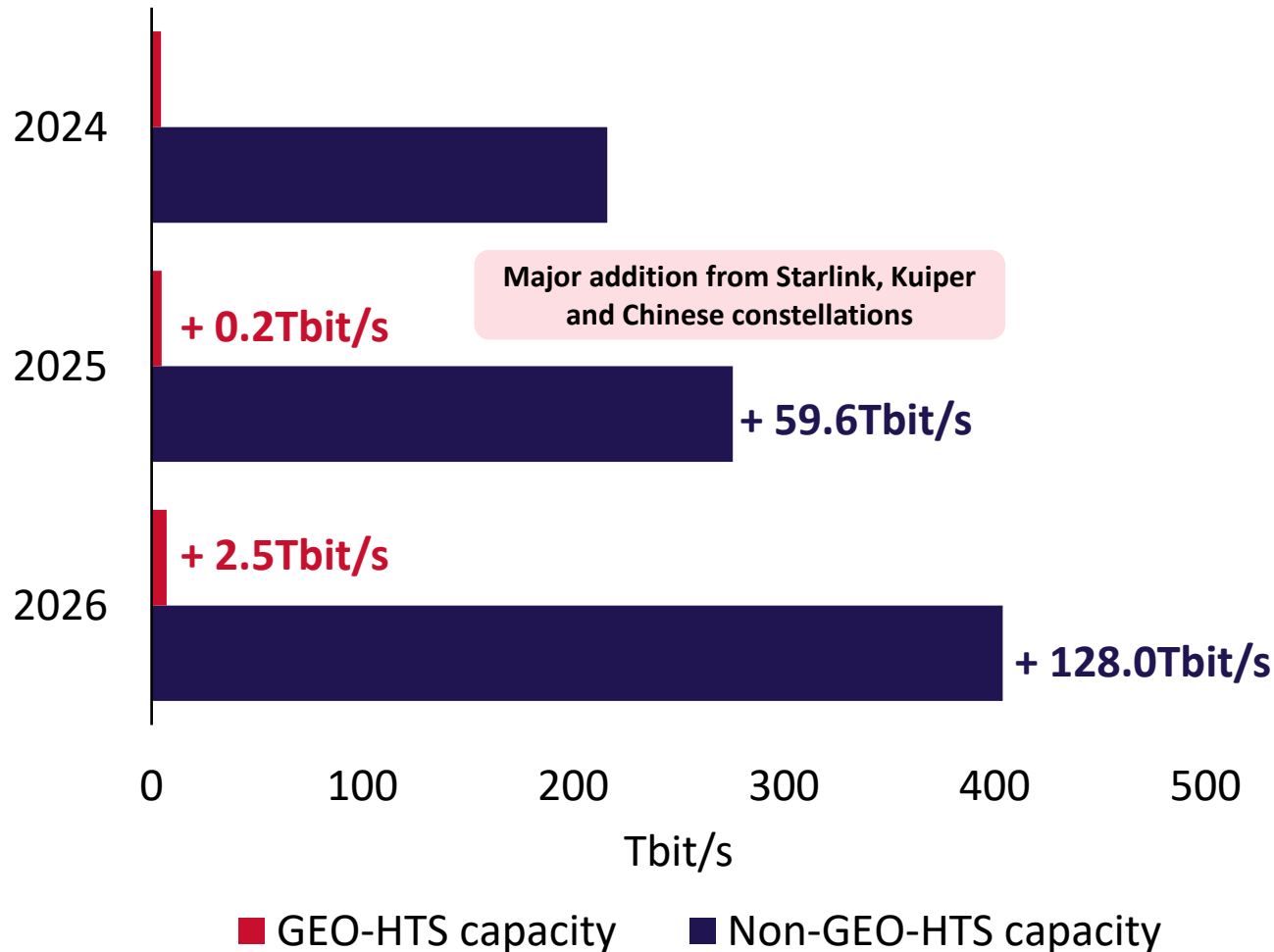


Presentation

GEO Vs Non-GEO HTS - Market Opportunity and Multi-Orbit Strategies

11 December 2025

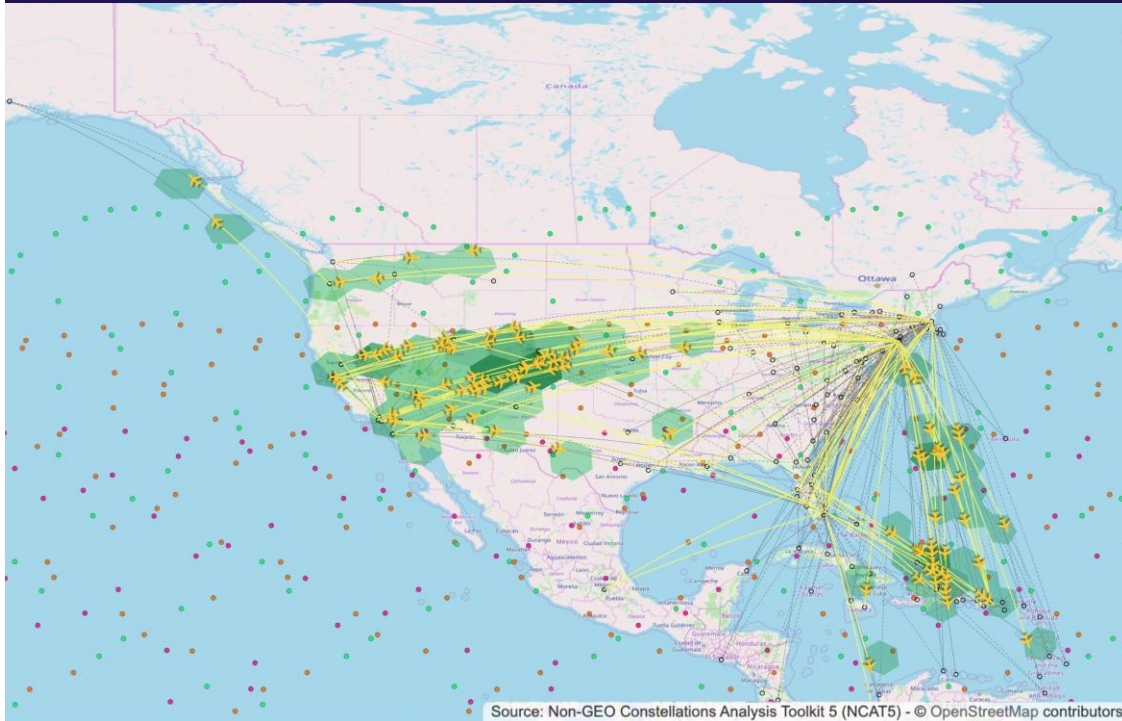
GEO operators face pressure as LEOs dominate the supply landscape with growing capacity, competitive pricing, and advanced services like SLAs



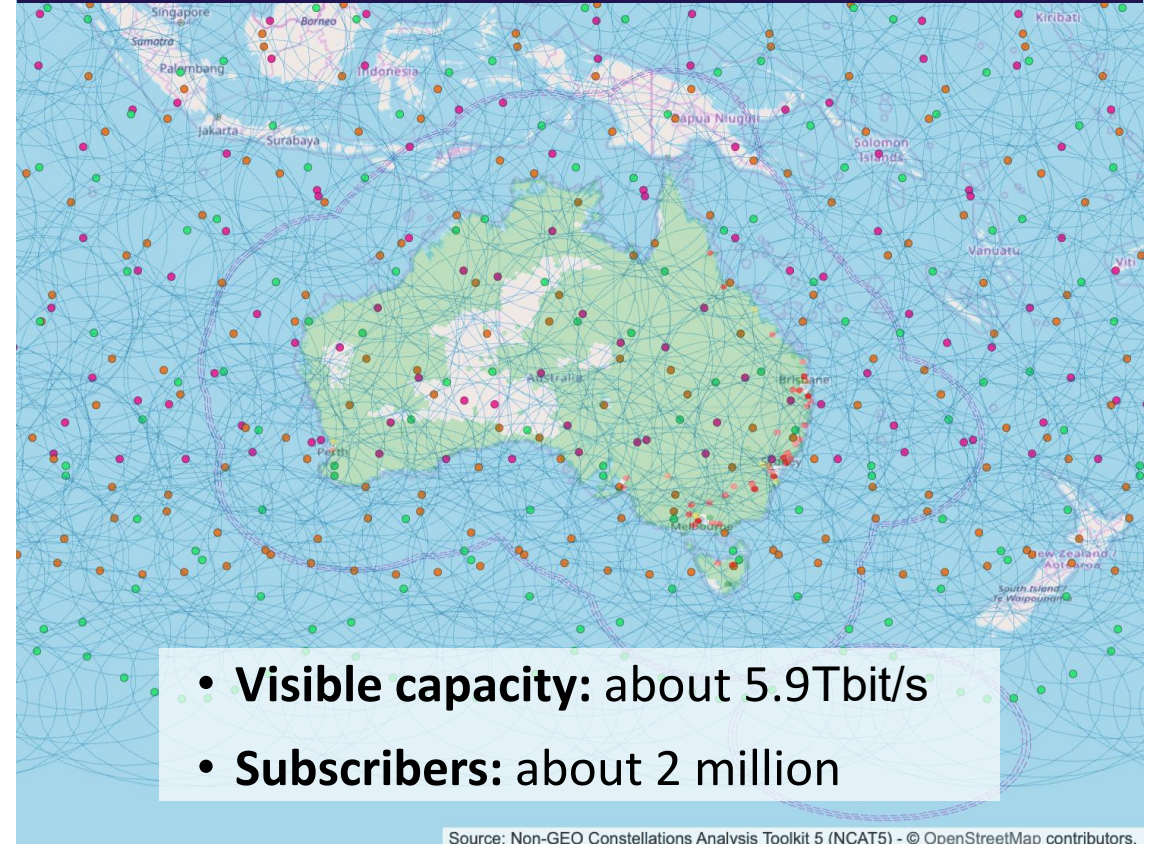
- Evolution of Starlink plans
 - SLA guarantees 99% uptime
 - introduction of data caps (50GB to 5TB)
 - 50GB or 500GB buckets
 - pricing as low as USD0.20 per GB
- New 'enterprise-grade' LEO services available very soon

The Kuiper constellation is quickly gaining traction with major deals

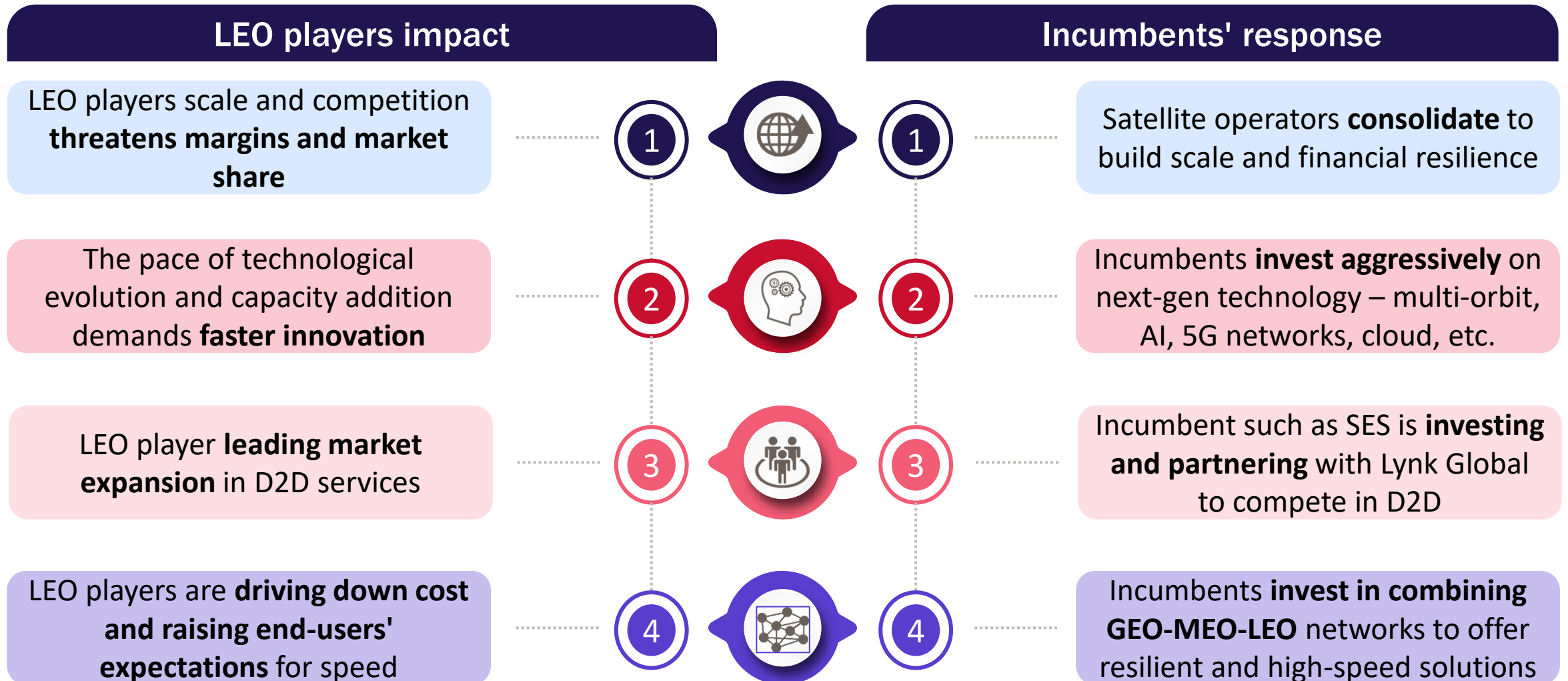
Kuiper constellation bandwidth dynamics on JetBlue's flight routes



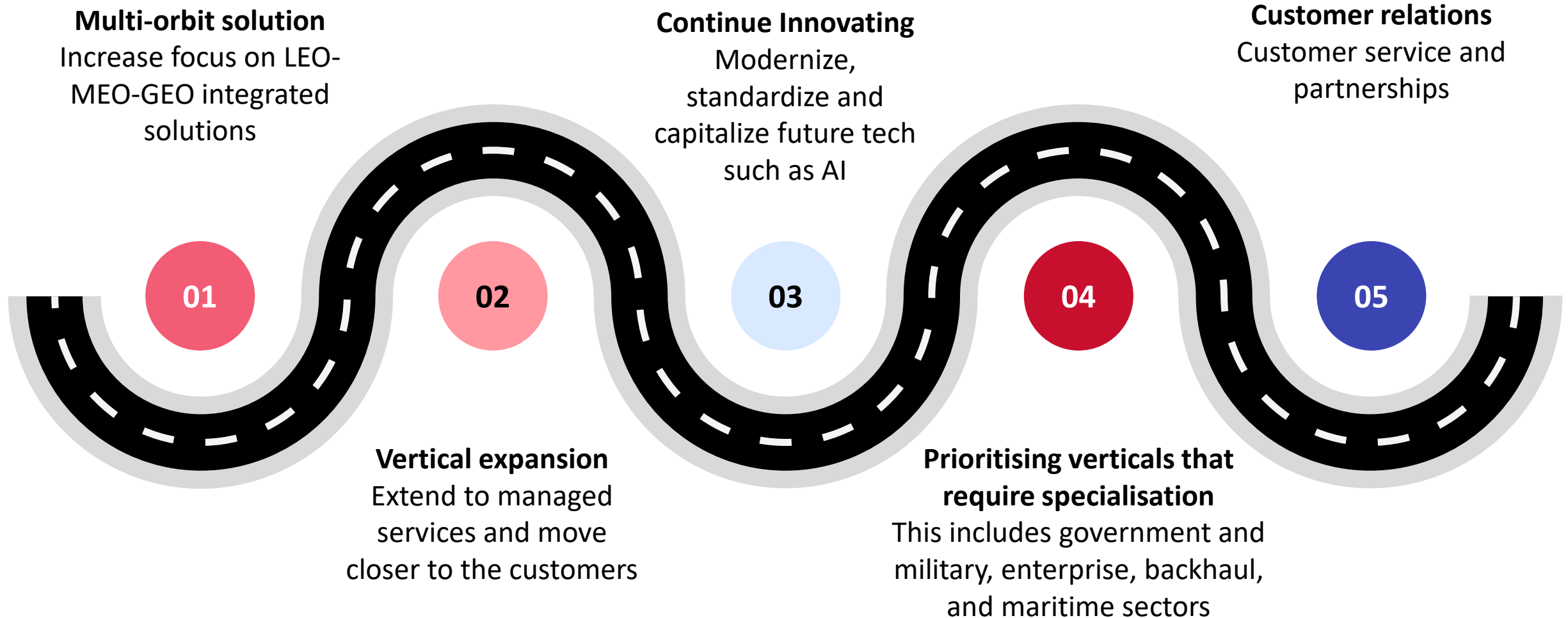
Kuiper constellation bandwidth dynamics over Australia



How are incumbents responding to the challenges from LEO constellation players?



Roadmap for Legacy Space Operators: Driving Growth through Integrated Multi-Orbit Solutions, Managed Services, and Technology differentiation





Questions





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