

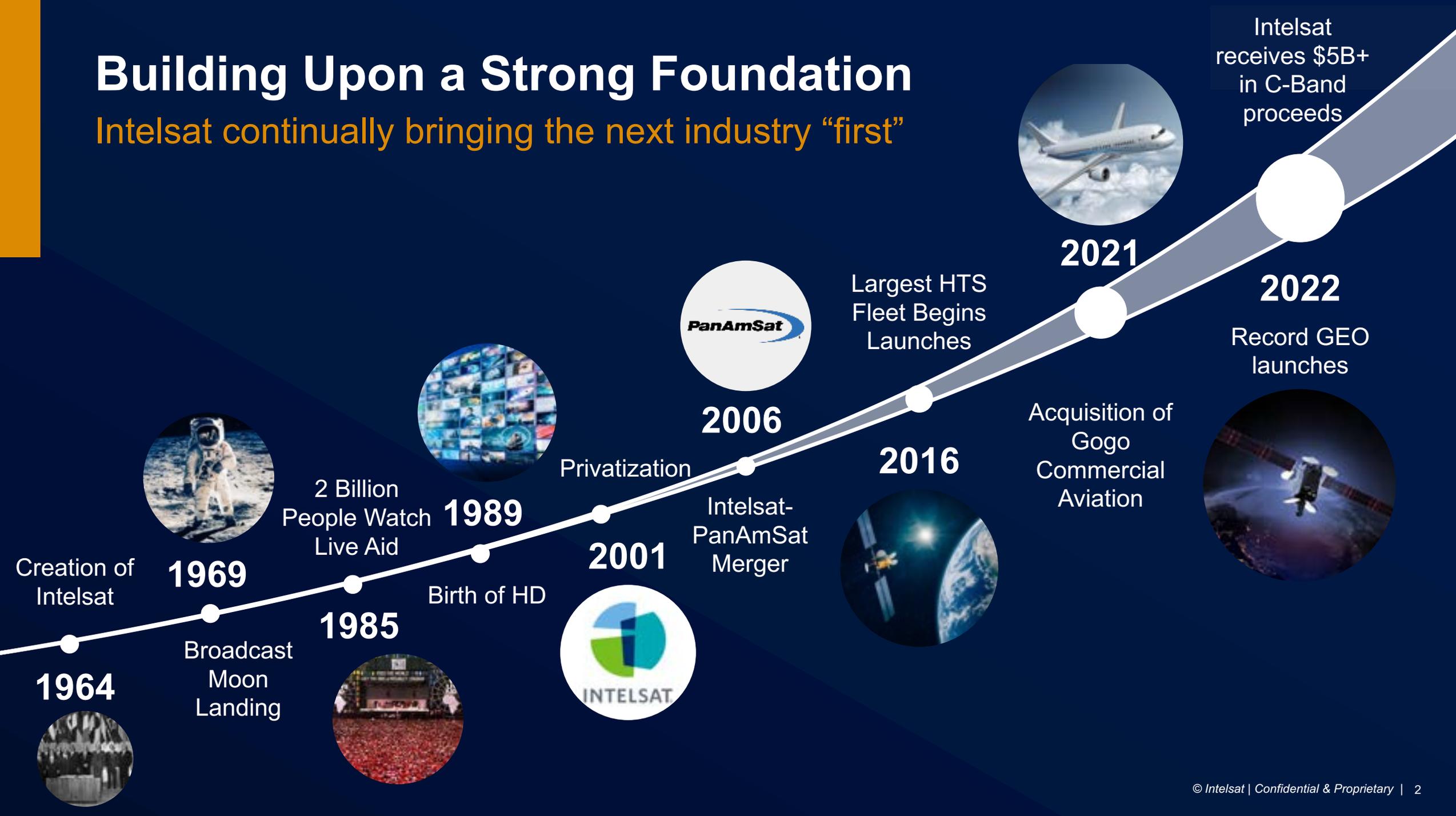
Transformation of the Satellite Industry

Murat Yavuz – Vice President, Corporate Strategy and Business Development

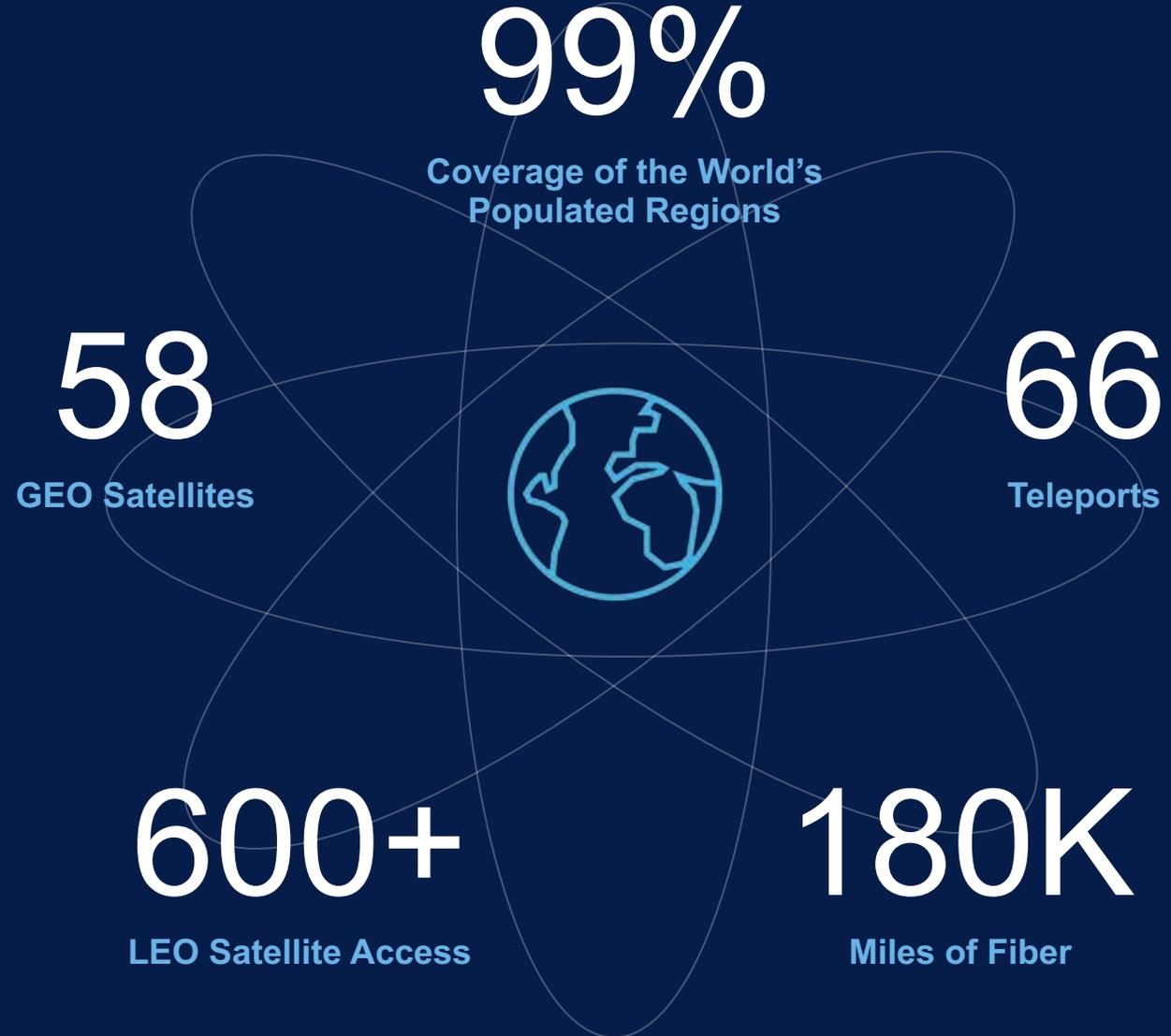


Building Upon a Strong Foundation

Intelsat continually bringing the next industry "first"



LARGEST GLOBAL INTEGRATOR OF SATELLITE AND TERRESTRIAL COMMUNICATIONS NETWORK



Mobility

Commercial Aviation

Increased passenger connectivity demand
Evolution to free model increases take rates

15 Years of Experience

25 Airline Partners

3,000 Connected Aircraft

10,000 Connected Flights a Day



Alaska
AIRLINES

 AIR CANADA

American Airlines 

AIRFRANCE 

 JAPAN AIRLINES

 LATAM
AIRLINES

Mobility

Maritime / Business Aviation / Land

Shift from wholesale to services in Maritime
Emerging demand for Land Mobility

13,000 FlexMaritime Terminals

~100 Business Jets Online

100,000+ Terminal Land
Mobility Pipeline



Networks

Shift to 4G/5G increasing demand
Integration of satellite technology into Telcos

8 Of the top 10 MNOs

15,000 Cell Towers Connected

#1 Capacity Provider to MNOs
and Enterprises



Media

Increase in the amount of video content
Content distribution moving to a hybrid
satellite/IP managed service model

37 Premium Distribution
Neighborhoods

30 Direct-to-Home Platforms

~2B Viewers Worldwide

4.3x Backlog/Revenue



The **WALT DISNEY** Company

WARNER MEDIA



Government

Increased role of space in sovereign domain for global governments and militaries

20 Years Serving the USG and Allied Governments

#1 Largest Bandwidth Provider from GEO to the USG

Moving up the Value Chain...Winning Foundational Programs



TRANSFORMATION OF THE SATELLITE INDUSTRY



Hardware to
Software

Diversification
of Orbits

End-to-End
Service Delivery

Industry
Consolidation

Technology Unlocking New Markets

1

Full-Stack Communications Solutions

2

Cloud and 5G Interoperability

3

Multi-orbit Mesh Networking

Critical Broadband Infrastructure



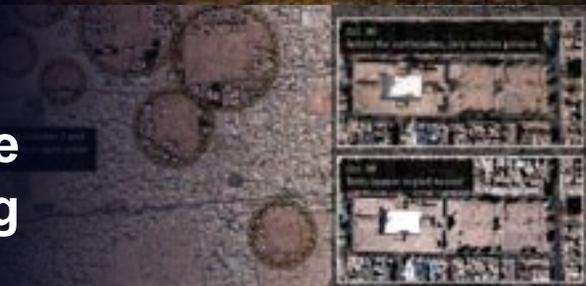
Space Computing Servicing



Mobility IoT



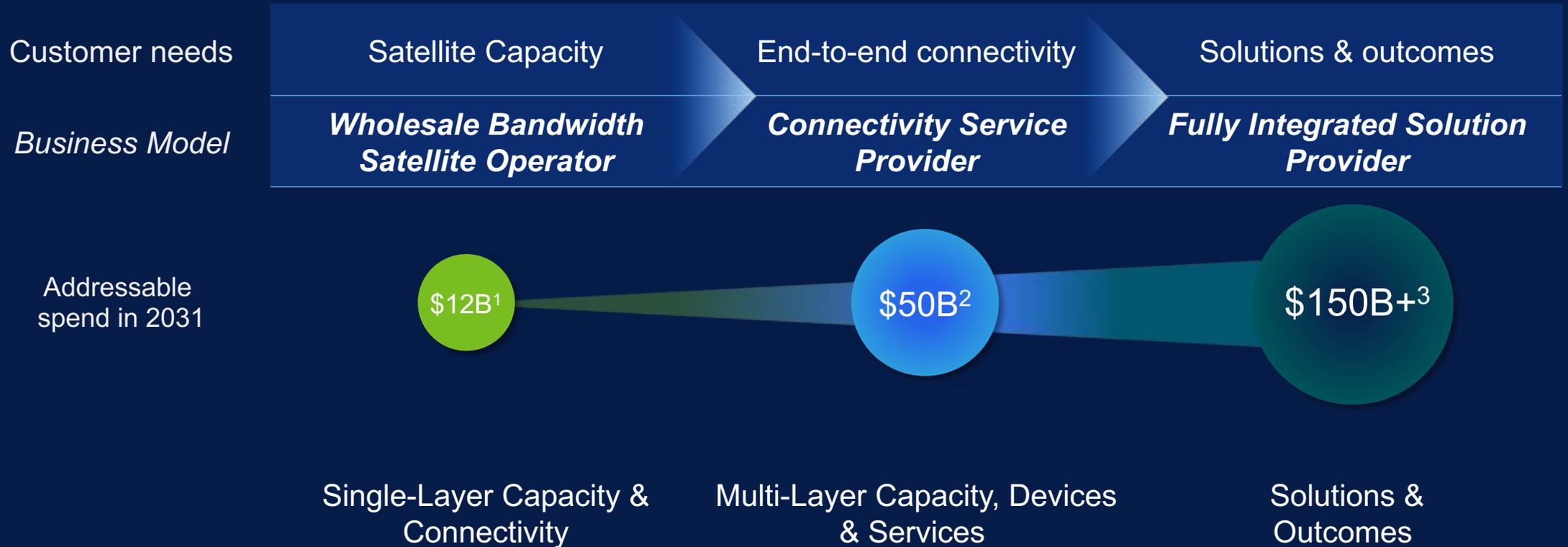
Instant Remote Sensing



Direct to Device



WELL POSITIONED TO WIN IN THE EVOLVING CUSTOMER LANDSCAPE



Intelsat will be a leading end to-end provider of seamless and secure, satellite-based network solutions to Government and Commercial customers globally

INDUSTRY DISRUPTORS... NEW SPACE LEO PLAYERS



The bar has already been raised

HOW DOES INTELSAT COMPETE?

Utilize our "competimate" strategy...

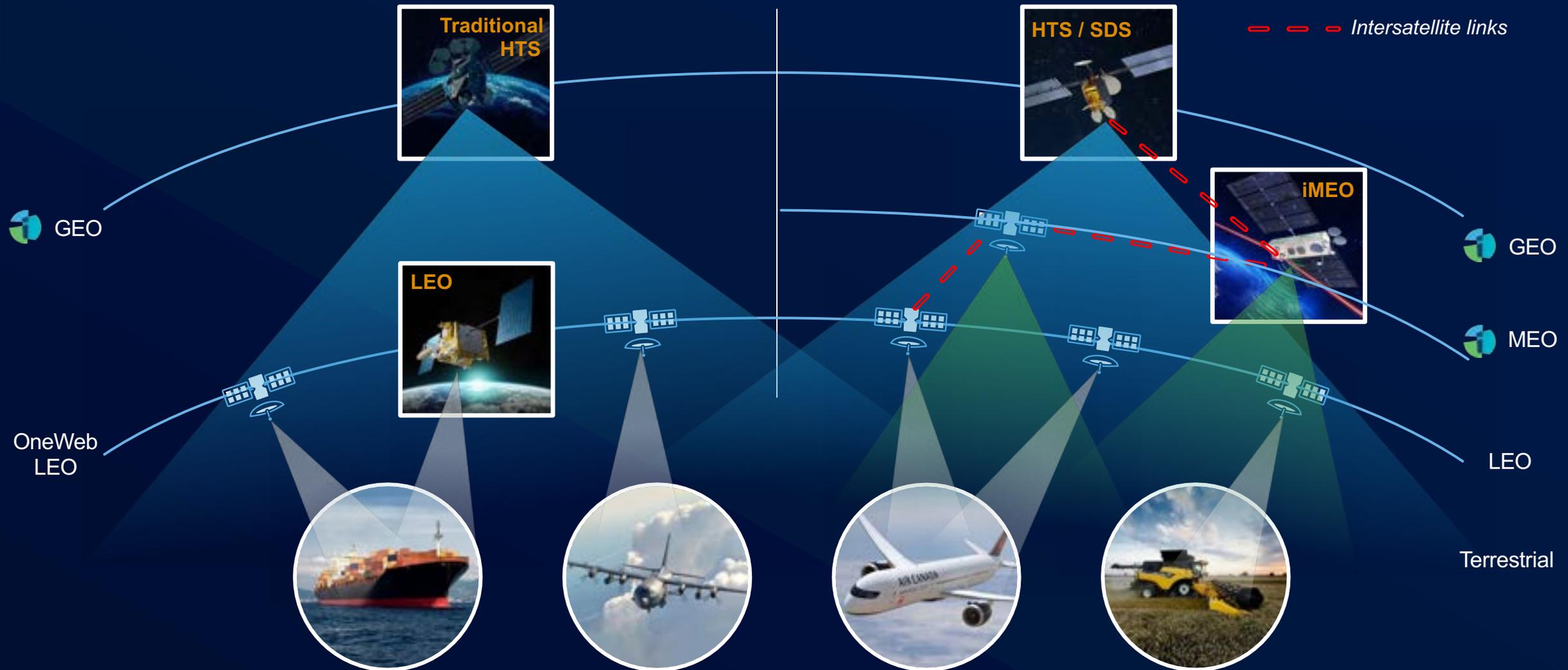
A multi-orbit solution

Leverage our carrier-grade network reliability and security

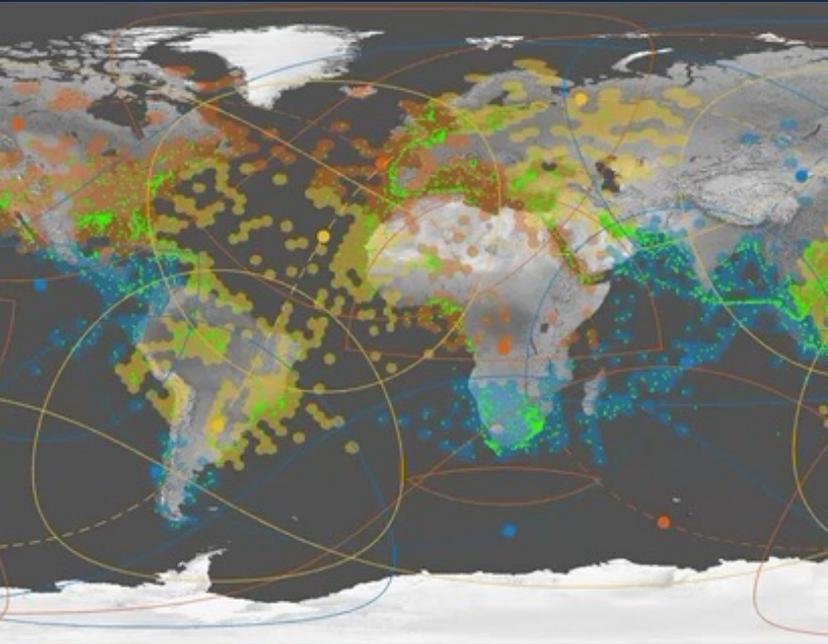
Drive and extend premium end-to-end service delivery

Advancing Fleet Capabilities in Every Orbit

Scaling Capacity in the Next Five Years to Enable New Services



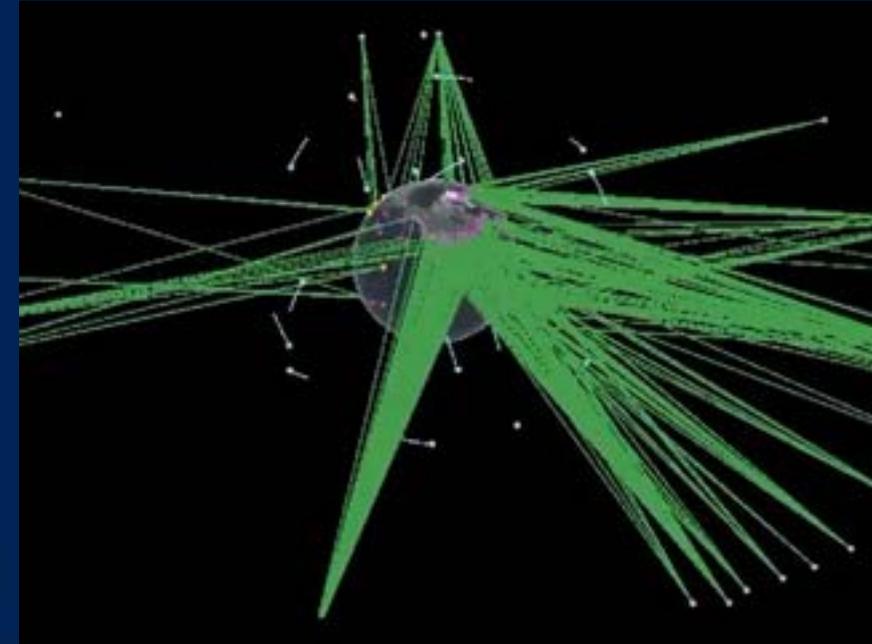
Digitally Orchestrating Space and Ground Assets



1 Tbps core mission



Breakthrough optical comms
20Gbps to 1Tbps



Space Cloud – AI for
space & ground

Our Roadmap to the Future

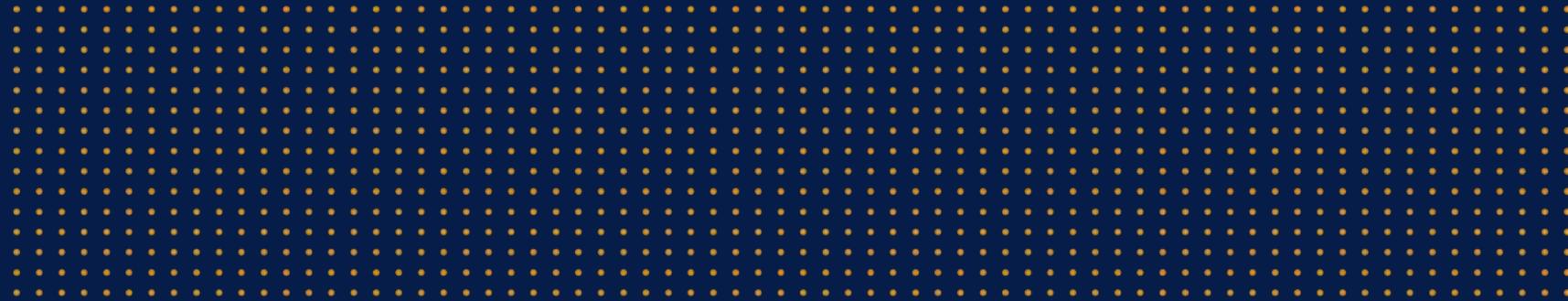
Scaling up our commercial impact



Carrier-grade, Interoperable and Secure Portfolio

Key Takeaways

- 1 | Relentless Industry Transformation**
- 2 | Expanded Market Opportunity and Use Cases**
- 3 | Next Generation Capabilities and Multi-Orbit**
- 4 | Positioned for Value Creation**



Thank You

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