Inmarsat Maritime—a new approach

Frank Coles, President
Inmarsat Maritime
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Agenda

Market conditions 2012

Inmarsat Maritime 2012

Addressing customer requirements

Distribution philosophy
Market conditions 2012
Maritime Market summary

➤ Global Economy
   Euro crisis, housing market, employment market

➤ Shipping Industry
   Overcapacity, downturn in trade, shipyard orders

➤ Communications Solutions in Shipping
   Conundrum of choice and the demand for data
   Confused and irrational market behaviour
Maritime communications reality check

- Financial
  - Will your supplier be there tomorrow

- Network Uptime
  - Are there gaps or issues with the service

- Product Reliability
  - What is the standard of reliability

- Scalability
  - Is there an upgrade path for improved service

- Future Proofed
  - What are the plans for the next generation service
Distribution philosophy
Distribution philosophy

➢ Grow Inmarsat Maritime and reiterate the value and brand
➢ Maintain a largely indirect channel distribution
➢ Get closer to the market
➢ Complete portfolio
FleetBroadband - The mariners choice

Successful product

Approximately 25,000 activated FleetBroadband SIMs
Over 30,000 FleetBroadband terminals sold

Split per terminal type estimated
- FB150 25%
- FB250 45%
- FB500 30%
FleetBroadband: Laddered pricing plans

- Very large allowance
- 5GB plan
- 3GB plan
- 1GB plan
- 500MB mid plan
- 200MB entry plan
- 5MB standard plan
Addressing customer requirements
A traditional view of maritime services

L-band

Sat-C
Mini M B Fleet
FB standard plan
FB entry plan

VSAT

FB VLA
Low-end VSAT

FB VLA
Low-end VSAT

Shared bandwidth, managed network
Dedicated bandwidth, private network

Voice
Crew email
Remote support

GMDSS
Business email
Browsing
Business data/VPN

Lower → Customer sophistication → Higher
Inmarsat Maritime services

- FleetBroadband
  - Sat-C
    - FB low volume plans
  - FB medium volume plans
  - FB high volume plans
  - Xpresslink
  - Global Xpress™

- VSAT
# Product and service - 2012 to 2015

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<th>Primary Customer Need</th>
<th>Maritime Segments</th>
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High speed broadband?

Cheap VSAT is cheap for a reason

“...the majority of respondents were unsure whether VSAT offered higher bandwidth.

This uncertainty stems from the lower speed service offerings of VSAT operators attempting to provide services at a price point attractive to ship operators.

High speed broadband?

*These services may be “always-on” but potential users don’t consider these low price options to offer broadband speeds. Such services have probably led to confusion or lack of understanding about the high speed capabilities of VSAT."

XpressLink

› Bridge to Global Xpress

› Available to all of our channel distribution

› Significant value on comparable broadband services
Global Xpress

▶ Game changing speeds and service for compared to the competition
▶ Fully redundant services and solutions
▶ Designed to take account of all the perceived issues
▶ Distributed through our indirect channel
▶ Equipment costs are comparable to FB and cheaper than Ku
Summary

➢ Invest for today and tomorrow

➢ Inmarsat has a complete portfolio of solutions

➢ Inmarsat will maintain a global indirect distribution channel

➢ XpressLink is available from the Inmarsat channel

➢ Global Xpress will change the way maritime communications is done
Thank you