World Satellite Business Week

The event on the agenda of every top-ranking actor in the satellite industry

18th Summit for Satellite Financing
Sept 8-10, 2014

11th Symposium on Satcom Market Forecasts
Sept 11, 2014

2014 Final Program

www.satellite-business.com
WHAT IS THE SUMMIT FOR SATELLITE FINANCING?

The unique meeting place bringing together the leaders defining the current and future business and financing strategies of the global satellite communications sector.

An international conference where executive speakers from different levels of the value chain discuss the factors affecting their markets from the point of view of different global regions.

An intimate event with a high concentration of top executive participants – you will be meeting the most influential people in the business.

80+ executive-level speakers from 25 countries

An intimate event set in an executive club-like atmosphere

13 round table sessions covering each level of the value chain

BUSINESS MEETINGS AND NETWORKING AN INTEGRAL PART

Strike all important business deals

The concentration of top-level decision makers at the Summit for Satellite Financing makes business meetings an essential part of the summit and many important strategic business deals are concluded during the week.

Refine your business strategy

Keep up-to-date with changes in the market that are affecting your customers’ needs and expectations and learn how your competitors around the world are rising to meet the new challenges.

Increase your executive network

With an active social program of sit-down lunches, cocktail receptions and coffee breaks, you will have plenty of time to mingle with top-level executives from all world regions and make contacts that become vital to your business development strategy.

New spaces available for business meetings

New areas will be opened up this year for the exclusive use of registered delegates in which informal business meetings and discussions can be held.

GET MORE INVOLVED

Book a business meeting room

Maximize the impact of your participation by hiring a private meeting room in which to hold discrete business meetings with the leaders defining the future of the sector.

Contact Ruth Mandeng (mandeng@euroconsult-ec.com) for more information. Limited availability!

Sponsorship opportunities available

We like to make sure that each sponsor has an opportunity to stand out at the Summit for Satellite Financing. By keeping the number of sponsorship or corporate branding opportunities to a minimum, each sponsorship, exhibition space or corporate branding opportunity has a definite impact on the 500 executive-level participants present.

Contact Annette Chatterton (chatterton@euroconsult-ec.com) to find out more.
WHO ATTENDS?

Over 60% of participants are VP level or above

Stéphane Israël, Chairman and CEO, ArianeSpace

This event brings together the “who’s who” of space business for a busy week of meetings, presentations and networking. Year after year, it is a priority on our calendar.

An outstanding balance between major satellite industry actors

The key leaders of the satellite communications business and the entire value chain are present at the Summit for Satellite Financing, making it the place to do business. Below is a sample of participating companies from two levels of the value chain.

Operators & services providers

SES • Intelsat • Eutelsat • Telesat • Airbus Defence & Space • Sky Perfect JSAT • Inmarsat • Iridium • Optus • Arabsat • RSNC • Hispasat • Nomura • Natixis • MHR • Jefferies & Co • Sumitomo Mitsui Banking Corporation • Gazprombank • Fieldstone • Intesa Sanpaolo • RBC Capital Markets • CPP Investment Board • Coface • Exult • Export Development Canada • Mansat/Spacelsa • Ausbrokers Canberra • Cavendish Trust • Intercontinental Management • Strategic Initiatives • West End Advisory Associates • BC Partners • Permira Advisors • Mubadala • PSP Investments • Unizon Capital • Macquarie Capital • Aquileia • Axap Partners • CFSGAM • Convergence Partners • GMP Securities • The Vinland Group • BC Partners • BMO Nesbitt Burns • InfraMed Management • Macquarie Capital • Mubadala • Permira Advisors • Raymond James • Renaissance Capital • Teachers’ Private Capital • Unizon Capital

Banks, investors

Morgan Stanley • JP Morgan • BNP Paribas • Barclays Capital • Goldman Sachs • Deutsche Bank • HSBC • Merrill Lynch • Crédit Suisse • Crédit Agricole • Citigroup • Société Générale • ING • Lazard • UBS • Exane BNP Paribas • Nomura • Natixis • MHR • Jefferies & Co • Convergence Partners • GMP Securities • The Vinland Group • BC Partners • BMO Nesbitt Burns • InfraMed Management • Macquarie Capital • Mubadala • Permira Advisors • Raymond James • Renaissance Capital • Teachers’ Private Capital • Unizon Capital

200+ participants from satellite operators and service providers
MONDAY, SEPTEMBER 8, 2014

8:00 // Registration & welcome coffee hosted by ABS

9:00 // Opening remarks

Lorraine Whitfield, Director, Events, Euroconsult

9:10 // Opening speech - State of play and challenges for the satellite sector

Pacome Revillon, CEO, Euroconsult

9:30 // Growth strategies for FSS operators from Russia to Asia Pacific

The Russian and Asia Pacific FSS markets, although growing overall, are facing highly diversified demands and competitive dynamics. Top executives from leading Asian operators will debate on the current main opportunities and challenges and on their growth strategies in and outside the region.

Moderator: Richard Roithner, Director, Satcom, Euroconsult

Dennis Pivnyuk, CFO, RSCC
Dmitry Sevastiyanov, Director General, Gazprom Space Systems
Deepak Mathur, Senior Vice President, Commercial Asia-Pacific, SES
Paul Brown-Kenyon, CEO, Measat
Guangren Cheng, President, APT

10:30 // Coffee break hosted by Arabsat

11:00 // Project financing in the satellite sector

In a competitive satellite market with more complex designs and business models, executives from export credit agencies and commercial banks will share their views on the financing of new satellite systems. Their return on experience on processes over the last two years and prospects for the short to middle term will be discussed.

Moderator: Ed Ansell, Editor, SatelliteFinance

Régine Schapiro, Head of Unit Energy, Telecom, Space, Coface
Michelle Miller, Senior Loan Officer - Project & Structured Finance, Ex-Im Bank
Alexey Tyupanov, Head of Structured Project and International Business Development, EXIAR
Olivier Royer, Managing Director, Telecom, Media & Technology Finance, Société Générale

11:45 // The future of TV distribution and the role of satellites

Development trends in the TV sector and broadcasters’ needs are undergoing profound changes. Top executives from leading stakeholders will share their views on future priorities and the requirements of players in the media sector. The role of satellite for content distribution will be discussed.

Moderator: Susan Irwin, Head, US Office, Euroconsult

Olivier Barberot, Chairman & CEO, Globecast
David Crawford, MD Satellite and Media, Arqiva
Bill Tillson, CEO, Encompass
Avi Cohen, CEO, RRSAT

12:45 // Lunch hosted by Airbus Defence & Space

14:30 // EMEA satcom business: Opportunities and challenges

The orbital arc over Europe, the Middle East and Africa addresses a large variety of markets with highly different growth dynamics, but all characterized by stronger competition with more capacity supply. Leading players will unveil their growth strategies and highlight the largest market opportunities in the region.

Moderator: Stéphane Chenard, Senior Associate Consultant, Euroconsult

Khalid Ahmed Balkheyour, President & CEO, Arabsat
Masood M. Sharif Mahmood, CEO, Yahsat
Lars Janols, Strategy & Business Development Director, Telenor Satellite Broadcasting

15:30 // Coffee break hosted by ThalesAlenia Space

16:00 // New satellite programs and operators

Executives from organizations with their first satellites either in orbit or in construction will present their objectives and strategies. From servicing domestic needs to international development, the discussion will focus on the different development models, including the overall positioning, level of vertical integration and cooperation with other industry stakeholders.

Moderator: Steve Bochinger, COO, Euroconsult

José Ignacio Peralta Sanchez, Under Secretary for Communications, SCT
Eduardo Bonini, President, Visiona Tecnología Espacial
Matías Bianchi Villetti, President, Arsat
Rashad Nabiyev, CEO, Chairman of the Board, Azercosmos

18:00 // “Energising Innovation” - Women executives roundtable organized by Eut’Elles’Sat

19:00 // cocktail reception at the Pavillon Daunou
TUESDAY, SEPTEMBER 9, 2014

9:15 // Investment bankers: Expectations for the satellite sector

The last two years have witnessed sustained investments in new satellite systems and more M&A activity focused on regional satellite operators. Top investment bankers will debate on how investors perceive satellite operators, on the performance of the sector and on current and expected trends for industry consolidation and M&A transactions.

**Moderator:** Peter Nesgos, Partner, Milbank
Fred Turpin, Managing Director, JPMorgan
John Apostolides, Senior Vice President, Macquarie
Arnaud Burger, Managing Director, Deutsche Bank
Clifton Marriott, Managing Director, Goldman Sachs
James C. Murray, Partner, PJT Partners

10:30 // Coffee break

11:15 // MSS operators: Innovation for business growth

The mobile satellite market continues to adapt, as frontiers between MSS and FSS solutions become thinner with more integrated solutions, and as customer needs in certain segments, ranging from transportation to military forces, are evolving. Top executives from MSS operators will elaborate on their current investment and development strategies in the current business environment.

**Moderator:** Richard Roithner, Director, Satcom, Euroconsult
Rupert Pearce, CEO, Inmarsat
Matthew Desch, CEO, Iridium
Samer Halawi, CEO, Thuraya
Tony Navarra, President of Global Satellite Operations, Globalstar

12:30 // Lunch hosted by eutelsat

14:30 // Global satellite operators: The next business horizon

Leading satellite operators posted a solid operating performance last year. However, generating growth has recently become increasingly challenging and access to new business opportunities appears to be highly disputed. Chief executives will debate on the current market environment and on the best strategies to protect margins, manage investments in their infrastructure and deliver growth either organically or through targeted acquisitions.

**Moderator:** Pacôme Révillon, CEO, Euroconsult
Karim Michel Sabbagh, President & CEO, SES
Michel de Rosen, Chairman & CEO, Eutelat
David McGlade, Chairman & CEO, Intelsat
Daniel Goldberg, President & CEO, Telesat
Evert Dudok, EVP, Head of Communications, Intelligence and Security, Airbus Defence & Space

16:00 // Coffee break hosted by telerior

16:30 // Prospects for the launch satellite business

Changes in satellite designs, new competition and investments in new capabilities modify the environment in the launch sector. Top executives from commercial launch service providers will share their views on current market trends and on their strategies to deliver the most adapted solutions to their customers.

**Moderator:** Warren Ferster, Editor, Space News
Stéphane Israël, CEO, ArianeSpace
Phil Slack, President, ILS
Serguei Gugkaev, Member, Board of Directors, CEO, Sea Launch
Robert Cleave, President, Lockheed Martin Commercial Launch Services
Gwynne Shotwell, President & COO, SpaceX
Gao Ruofei, Executive Vice President, CGWIC

18:00 // Cocktail reception hosted by
WEDNESDAY, SEPTEMBER 10, 2014

9:15 // Strategies for FSS operators in the Americas

The US market is undergoing a phase of optimization of broadband and video content delivery through new generation systems. In parallel, the Latin American FSS market has been one of the fastest growing in recent years, with capacity demand for both TV broadcasting and communications and higher capacity prices. These dynamics have also attracted new investments from both commercial operators and for the launch of several national systems. Top executives from leading operators in the Americas will share their views on market prospects and on their strategies to leverage on existing and future growth opportunities.

Moderator: **David Hartshorn**, Secretary General, GVF
Carlos Espinós, CEO, Hispasat
Patricio Northland, CEO, Eutelsat Americas
Phil Goswitz, SVP Space & Communications, DirecTV
Lincoln Oliveira, General Director, Star One

10:30 // Coffee break hosted by

11:00 Development plans of leading satellite manufacturers

Growing diversity in payload requirements and customer types and strong competition continue to have an impact on the satellite manufacturing market. Top executives from manufacturers of commercial GEO communication satellites will debate on current market dynamics, changes in customer requirements and on the best strategies and differentiators to maintain or increase market share.

Moderator: **Steve Bochinger**, COO, Euroconsult
Eric Béranger, SVP, Head of Space Systems Programs, Airbus Defence & Space
Jean-Loic Galle, President & CEO, Thales Alenia Space
John Celli, President, SSL
Jim Simpson, President, Boeing Satellite Systems International
Michael A. Hamel, Vice President and General Manager, Commercial Space, Lockheed Martin
David Thompson, Chairman, President & CEO, Orbital Sciences Corporation

12:15 // Lunch hosted by

Satellite communications awards ceremony

14:30 // VSAT solutions and services: Delivering the broadband promise

The move towards higher data rates, the rise of mobile applications, potential lower activity in the defense segments, growth of terrestrial networks and the availability of new satellite capacity are among the factors driving changes in satellite communication services. Executives from leading market players will debate on market drivers, winning strategies and the rationale for more consolidation, vertical integration or stability in the value chain.

Moderator: **Louis Zacharilla**, Director of Development, SSPI
Pierre-Jean Beylier, CEO, SpeedCast
Luigi Pasquali, Group CEO, Telespazio
Abel Avellan, CEO, EMC
Ted Hengst, CEO, Artel
Kevin Steen, COO, iDirect
Robert J. Kibbernus, President & CEO, Signal Horn

15:45 // Coffee break hosted by

16:15 // Operating of HTS systems: Strategies for growth and ROI

With capacity increasingly deployed in the market, the market has entered further into its development phase. From consumer broadband to enterprise and mobile segments, top executives from leading market players in the broadband satellite segment will share insights on growth trends, return of experience on customer acceptance and needs and on their strategies to boost growth.

Moderator: **Nathan de Ruiter**, Senior Consultant, Euroconsult
Pradman Kaul, President, Hughes Network Systems
Mark Dankberg, Chairman & CEO, ViaSat
Steve Collar, CEO, O3b Networks
Adrian Ballintine, Founder & CEO, NewSat

17:30 // Closing remarks
In an ever changing economic and political environment, the Symposium on Market Forecasts will focus on the drivers and challenges that will shape the future of the satellite communications business. Senior executives from leading satellite operators and manufacturers will present their strategic vision for the future of the market; sharing their views on growth opportunities, the competitive environment and expected challenges, the impact on selected emerging applications, upcoming innovations as well as future satellite designs and needs. Presentations and debates will be supported by facts and figures.

9:00 // Euroconsult’s views on the state of play and prospects for the satcom market
Richard Roithner, Director, Satcom, Euroconsult

9:30 // Strategy executives look at the future of satellite markets
Moderator: Stéphane Chenard, Senior Associate Consultant, Euroconsult
Bruno Fromont, VP Corporate Strategy, Intelsat
Edgar Milic, General Manager, Strategic Portfolio Management, SES
Jean-Hubert Lenotte, Director of Strategy, Eutelsat
Patrick McDougal, Corporate VP – Strategy and Business Development, Inmarsat

10:30 // Coffee break hosted by SSL

11:00 // Prospects for satellite manufacturing
Moderator: Pacôme Révillon, CEO, Euroconsult
Jean-Francois Charrier, Head of Institutional Business, Markets and Telecom Systems, Airbus Defence and Space
Richard Currier, SVP, Business Development, SSL
Bruce Chesley, VP, Business Development, Space & Intelligence Systems, Boeing Network and Space Systems
Chris Baran, VP of Business Development, Commercial Space, Lockheed Martin
Christophe Wilhelm, SVP Strategy, Thales Alenia Space

12:00 // What operators want: Views from their CTOs
Moderator: Rachel Villain, Principal Advisor, Euroconsult
Martin Halliwell, CTO, SES
Thierry Guillemin, CTO, Intelsat
Yohann Leroy, CTO, Eutelsat

13:00 // Closing remarks
About Euroconsult – The Summit Organizers
Euroconsult is the leading global consulting firm specializing in space markets. As a privately-owned, fully independent firm, we provide first-class strategic consulting, develop comprehensive research and organize executive-level annual summits for the satellite industry. With 30 years of experience, Euroconsult is trusted by over 550 clients in 50 countries. Euroconsult is headquartered in Paris, with offices in Montreal, Washington, D.C. and permanent representation in Japan, complemented by a network of senior affiliate consultants. Our activity includes:

CONSULTING
We have completed over 450 consulting missions in over 50 countries, providing independent assessment and decision-making assistance to the institutional, industrial and financial organizations involved in the space sector.

RESEARCH
We evaluate the space and satellite industry including its structure, market players, revenues and dynamics. For three decades our research has been used as a key reference tool by most public and private stakeholders involved in the sector.

SUMMITS
We organize executive-level summits to provide a forum for our clients from around the world to meet, benchmark and exchange viewpoints on issues facing the industry. Our annual flagship event, the World Satellite Business Week, has been running since 1995 and is considered the can’t-miss event of the industry.

For more information, consult our website: www.euroconsult-ec.com

INFORMATION
Further information on the event and updates on the program are available on the event website at www.satellite-business.com

Contact: Kim Joly
summits@euroconsult-ec.com / Tel: +33 1 49 23 75 28

Official Partners

SES
SES is a world-leading satellite operator, providing reliable and secure satellite communications solutions to broadcast, telecom, corporate and government customers worldwide. We own and operate a fleet of more than 50 geostationary satellites that are complemented by a network of teleport and offices located around the globe. This far-reaching infrastructure enables our customers to reach 99% of the world’s population and places SES at the heart of the global communications chain. SES (Euronext Paris and Luxembourg Stock Exchange: SESO) holds participations in Ciel in Canada and QuetzSat in Mexico, as well as a strategic partnership in O3b’s fiber-like, medium-earth constellation.

Arianespace
Arianespace is the world’s leading satellite launch company. Founded in 1980, Arianespace deploys a complete family of three launchers, Ariane, Soyuz and Vega, to meet the needs of both commercial and government customers, with more than 250 launches already performed. Backed by its 21 shareholders and the European Space Agency, Arianespace is the only company in the world capable of launching all types of payloads into all orbits, from the Guiana Space Center in French Guiana. As of August 22, 2014, Arianespace had carried out 218 Ariane launches, 34 by Soyuz (among which 9 at the Guiana Space Center) and 3 by Vega. Arianespace is headquartered in Evry, near Paris, and has a facility in Kourou, French Guiana, plus local offices in Washington D.C. (United States), Tokyo (Japan) and Singapore. www.arianespace.com

Lockheed Martin
Lockheed Martin Space Systems Company (LMSSC) designs and develops, tests, manufactures, and operates a full spectrum of advanced-technology systems for national security and military, civil government, and commercial customers. Chief products include human space flight systems; a full range of remote sensing, navigation, meteorological, and communications satellites and instruments; space observatories and interplanetary spacecraft; space launch services; laser radar; ballistic missiles; missile defense systems; and nanotechnology research and development. www.lockheedmartin.com

The Isle of Man is dedicated to providing a financial and regulatory environment specifically tailored to meet the needs of the satellite communications industry. With a Zero Rate of Corporate Tax for Space Based businesses, a strong economy rated ‘A’ by Moody’s and a stable political foundation celebrating 1,035 years of continuous parliamentary government in 2014, our goal is to continue to provide an environment that allows the growing space-based business sector on the island to thrive. For more information please visit www.spaceisle.com

Milbank
Milbank, Tweed, Hadley & McCloy LLP is committed to providing comprehensive legal services to the space business. Drawing from the diverse capabilities of more than 600 professionals in offices in New York, Washington, D.C., Los Angeles, London, Frankfurt, Munich, Tokyo, Singapore, Hong Kong, Beijing and Sao Paolo, the Space Business Group at Milbank delivers experienced advice in finance, corporate and M&A, commercial contracts, risk management and trade and regulatory matters to satellite operators, aerospace manufacturers and financial institutions around the world. For more information, visit www.milbank.com

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For 25 years, SpaceNews has provided decision-makers throughout the industry with timely and comprehensive space and satellite news, giving them the competitive intelligence they need to succeed. Covering the centers of power and finance throughout the industry, SpaceNews provides a critical perspective that decision-makers rely on. In print or online, we provide news, commentary and analysis that make us the leading source of information for the space professional on every major continent. Whether it’s the latest trend in military space capabilities, the next space mission, breaking developments in satellite telecommunication or pending launch schedules, SpaceNews keeps them informed. For more information, visit: www.spacenews.com

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