World Satellite Business Week

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

19th Summit for Satellite Financing
Sept 14-16, 2015 - The Westin, Paris

12th Symposium on Market Forecasts
Sept 17, 2015

2015 Final Program

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THE EVENT ON THE AGENDA OF EVERY TOP-RANKING ACTOR IN THE INDUSTRY

The satellite communications is heavily influenced by economic conditions, technological advances, political relations and legislative reforms. In this context, it is vital for companies operating in this sector to have the opportunity to meet and discuss with the leading decision makers shaping the global markets so as to effectively develop the strategies required to adapt and profit from this changing environment.

Euroconsult fulfills this need through the Summit for Satellite Financing, a unique summit that brings together over 500 top-level executives from the global satellite communications sector for three and a half days of top level business meetings and deal making as well as intense panel discussions featuring CEOs and other high-ranking executives.

WHY ATTEND?

Increase your executive network

Included in the conference pass, delegates and speakers alike are invited to attend official top-level social events, including a cocktail reception, sit-down lunches and coffee breaks, giving you plenty of time to exchange and meet decision makers from leading companies having an impact on the global satellite communications market.

Strike important business deals

The concentration of top-level decision makers at the summit makes it the ideal opportunity to have back-to-back business meetings with key decision makers that have a real impact on your business development strategy.

Refine your business strategy

A series of roundtable discussions and keynote presentations welcoming CEOs and other senior executives as speakers will allow you to gain insight into your customers’ needs, market dynamics and your competitors’ strategies to meet new challenges.

WHAT IS THE SUMMIT FOR SATELLITE FINANCING?
WHO ATTENDS?

**Business meeting rooms available**

Take advantage of the high-level attendance and arrange business meetings by hiring a private business meeting room or a suite in which to hold your meetings in complete confidentiality.

Contact us for more information at summits@euroconsult-ec.com

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 • Arabsat • Optus • Yahsat • Hispasat • China Satcom • Star One • AsiaSat • RSCC • Nilesat • Thuraya • Telenor • APT Satellite

Co • Gazprom Space Systems • MEASAT • ABS • Amos - Spacecom • Echostar • Turksat • SingTel • Avanti Communications • PAKSAT • Nigcomsat • RascomStar • Globalstar • Es'hailSat • DirecTV • AR-SAT • NewSat • O3b Networks • SCT/Telecom • XTAR • Azercom • OT Satellite Systems • GapSat • GlobeCast • ViaSat • Telespazio • Hughes Network Systems • Bulsatcom • Harris Corp • Speedcast • EMC • IXPN • Arqiva • Encompass Digital Media • Idenanco • Belintersat • Hisdesat Servicios • Bsat • EDB Fakel • Vizada Networks • Visiona • InterSputnik • Artei • IQT • PT. Pasifik Satelit Nusantara • Eser Telecom • HorizonSat • RRsat • Emerging Markets Communications • Signalhorn • Vivisat • Geyser-Telecom • SSI Monaco

**Banks, investors**

Morgan Stanley • JP Morgan • BNP Paribas • Barclays Capital • Goldman Sachs • Deutsche Bank • HSBC • Crédit Suisse • Crédit Agricole • Citigroup • Société Générale • ING • Exane BNP Paribas • Natixis • MHR • Jefferies & Co • Sumitomo Mitsui Banking Corporation • Fieldstone • Intesa Sanpaolo • RBC Capital Markets • BMO Capital Markets • SMBC Europe Ltd • CPP Investment Board • Golcane • Exim • Export Development Canada • Mansat/Spacelsie • Cavendish Trust • West End Advisory Associates • Mubadala • PSP Investments • Unison Capital • Macquarie Capital • Apax Partners • InfraMed Management • Raymond James • Renaissance Capital • PJT Partners • One Six International • Blenheim Capital Services • FTI Consulting • Docus Investments SA • Lesire AG • Khrizons Advisory Ltd • Castle Hill Asset Management
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

2013 and 2014 has proved to be a challenging couple of years for the industry due to downward revenue pressure from US DoD spending cuts, launch delays and Africa/Middle East oversupply. Is the worst over and what is the outlook for earnings growth and economics of the industry? Top investment bankers will discuss the state of current financial markets for satellite companies/projects and shed some light on investors’ perception of satellite operators, on the sector performance, on current and expected trends for M&A transactions.

There has been strong competition in the Middle East and Africa in recent years which has put pressure on prices. Leading operators and service providers in the region will discuss the latest market dynamics and share their strategy to stay ahead of competition.

After years of waiting, new generation constellations from MSS operators have finally come online. New services from MSS operators and competing mobile VSAT providers will significantly change the competitive market landscape. Top level executives from leading MSS operators will discuss opportunities and challenges for the mobile satellite industry in the coming decades.

Satellite capacity building is growing in Latin America with more satellite operators and service providers becoming active in their domestic market and in the export market. Senior executives from the Government of Mexico and key companies active in the Latin America will present their strategies for technology development and service capability and debate on market opportunities and challenges in the region.
9:00 // New trends in financing satellite systems

Export credit financing has made a clear impact on the financing of new satellite systems in recent years. Executives from both sides of the equation will share their first-hand experience on how to handle the processes and optimize results. In addition, near term prospects of new satellite projects will be discussed under the current investment climate.

Moderator: Ed Ansell, Editor, SatelliteFinance
Régine Schapiro, Head of Unit Energy, Telecom & Space, Coface
Sven List, Director, Project & Structured Finance, Export Development Canada
Maxim Zayakov, CEO, Bulgaria Sat

10:00 // Venture capital investment & the satcom business

Venture capital investment & the satcom business

Moderator: Geoffroy Stern, Senior Consultant, Euroconsult
Patrick McCall, Senior Partner, Virgin Group
Stuart Martin, Advisory Board Member, Seraphim Space

10:30 // Morning coffee break hosted by INTELSAT

11:00 // HTS Systems: Competition & growth strategies

HTS systems have become one of the major growth stories for the satellite industry. The competitive landscape is rapidly evolving with operators diversifying in system solutions, orbits and business models. This session will highlight the strategies and growth plans of market leaders, challengers and new entrants.

Moderator: Nathan de Ruitter, Senior Consultant, Euroconsult
Pradman Kaul, President, Hughes Network Systems
Steve Collar, CEO, 03b Networks
Rick Baldridge, President & COO, Viasat
David Williams, CEO, Avanti Communications
Lars Janol, Director, Strategy and Business Development, Telenor Satellite Broadcasting

12:00 // New space actors & satellite constellations

The satellite industry has thrust to the forefront of media attention following big investments and plans from internet giants and well-funded start-ups. These companies hold the potential to disrupt the industry and open up new market opportunities. In this panel session, key executives will reveal their plans and discuss their impact on how we will perceive our industry in the future.

Moderator: Rachel Villain, Principal Advisor, Euroconsult
George Whitesides, CEO, Virgin Galactic
Brian Holz, VP of Satellite, Launch, and Fleet Operations, OneWeb
Nathan Kundtz, CEO, Kymeta

12:45 // Lunch hosted by Eutelsat Communications

14:30 // Global satellite operators: Investment strategies for sustained growth

Leading satellite operators must address all of the changes driving the industry, involving a downward pressure on transmission costs, and higher terrestrial and satellite competition. Chief executives will debate on the most relevant strategy to deliver data and content to their customers and end-users, on changes in the economics of the satellite business and on transactions and partnerships impacting their value chain.

Moderator: Pacôme Révillon, CEO, Euroconsult
Karim Michel Sabbagh, CEO, SES
Michel de Rosen, Chairman & CEO, Eutelat
Steve Spengler, CEO, Intelsat
Daniel Goldberg, President & CEO, Telesat
Evert Dudok, EVP, Head of CIS, Airbus Defence & Space

16:00 // Afternoon coffee break hosted by Telenor Satellite Broadcasting

16:30 // Towards better commercial access to space

Launch service providers are currently busy with full commercial launch calendars whilst at the same time preparing replacement launch vehicles. In an industry undergoing reorganization, top executives representing main launch service providers will present why and how they are ensuring that their launch solutions always respond to the needs of the commercial market.

Moderator: Warren Ferster, Editor, Space News
Stéphane Israël, Chairman & CEO, Arianepace
Kirk Pysher, President, ILS
Gwynne Shotwell, President & COO, SpaceX
Steve Skladanek, President, Lockheed Martin
Commercial Launch Services
Ko Ogawara, VP & Director, Space Systems Business Development Department, MHI
Zhiheng Fu, Vice President & General Manager, China Great Wall Industry Corporation

17:45 // Cocktail reception hosted by SSL
9:00 // Satellite communications in Asia

The satellite communications sector in the Asia-Pacific region is highly dynamic. A number of satellite operators in the region are rapidly expanding their satellite fleet and have started to offer services out of the region. Leading Asian satellite operators and service providers will discuss opportunities and challenges for future business growth.

Moderator: Nathan de Ruiter, Senior Consultant, Euroconsult
Pierre-Jean Beylier, CEO, Speedcast
William Wade, President & CEO, Asiasat
Tom Choi, CEO, ABS
Huang Baozhong, VP, APSTAR

10:00 // Growth & business prospects for the CIS region

The CIS region has been one of the fastest growing satellite markets in the last 3 years. However, the high growth of demand has been mixed with political tension and fluctuation in currency exchanges. Leading satellite operators and service providers from the region will discuss opportunities and uncertainties in their business.

Moderator: Stéphane Chenard, Senior Associate Consultant, Euroconsult
Dennis Pivnyuk, CFO, RSCC
Dmitry Sevastiyanov, Director General, Gazprom Space Systems
Andrey Kuropyatnikov, General Director, Morsviazsputnik

10:45 // Outlook from a financial analyst / Equity market

Chris Quilty, Senior Vice President, Raymond James

11:00 // Morning coffee break hosted by
Optimal Satcom

11:30 // Strategies of leading satellite manufacturers to remain at the cutting edge of the commercial industry

Customer requirements are becoming more diverse than ever in the GEO comsat industry. Satellite manufacturers are adapting their offerings in order to be on time, on price and on quality. Top executives of satellite operators will present their technical and commercial efforts to remain at the cutting edge of competitiveness and to differentiate.

Moderator: Steve Bochinger, COO, Euroconsult
John Celli, President, SSL
Carl A. Marchetto, VP & GM, Commercial Space, Lockheed Martin Space Systems
Mark Spiwak, President, Boeing Satellite Systems International Inc.
Frank Culbertson, President, Space Systems Group, Orbital ATK
Eric Béranger, SVP, Head of Space Systems Programs, Airbus Defence & Space
Jean-Loïc Galle, President & CEO, Thales Alenia Space

12:45 // Lunch hosted by
Boeing

Satellite communications awards ceremony

14:30 // What next for TV distribution

Broadcasters’ needs are undergoing profound changes with the growing importance of non-linear distribution led by OTT and the first 4K channel rollouts. Top executives from leading video service providers will share their views on future priorities and the new requirements of players in the rapidly-evolving media sector. The current and future expected role of satellite for content distribution and development trends in the TV sector will be discussed.

Moderator: Susan Irwin, Head, U.S. Office, Euroconsult
Bill Tillson, Executive Chairman, Encompass
David Crawford, Managing Director Satellite & Media, Arqiva
Avi Cohen, CEO, RR Media
Marco Brancatti, SVP BU Networks & Connectivity, Telespazio

15:30 // Afternoon coffee break hosted by
Space Foundation

16:00 // Trends and prospects for mobility solutions

The mobile satellite communications market has scored double digit growth since early 2010’s. The ever-increasing connectivity requirements from both crew and passengers, as well as the emergence of new applications such as Cloud computing have led to significant changes in product offerings and business models in the aeronautical and maritime sectors. Industry leaders will share their vision and growth strategies.

Moderator: Wei Li, Senior Consultant, Euroconsult
Abel Avellan, CEO, EMC
David Bruner, Vice President of Global Communications Services, Panasonic Avionics
Dave Davis, CEO, Global Eagle Entertainment
Anand Chari, Executive Vice President & Chief Technology Officer, Gogo
Glenn Latta, President, Thales LiveTV

17:15 // Closing remarks
THURSDAY, SEPTEMBER 17, 2015

8:00 // Registration & welcome coffee hosted by ZODIAC AEROSPACE

9:00 // Euroconsult’s views on the state of play and prospects for the satcom market
Brent Prokosh, Consultant, Euroconsult
Dimitri Buchs, Consultant, Euroconsult

9:30 // Strategy executives look at the future of satellite markets
Moderator: Nathan de Ruiter, Senior Consultant, Euroconsult
Edgar Milic, GM, Strategic Portfolio Management, SES
Bruno Fromont, VP Corporate Strategy, Intelsat
Jean-Hubert Lenotte, Director of Strategy, Eutelsat
Stefano Poli, Director, Market Development, Inmarsat

10:30 // Morning coffee break hosted by Telespazio

11:00 // Prospects for satellite manufacturers
Moderator: Pacôme Révillon, CEO, Euroconsult
Bruce Chesley, Chief Architect, Boeing Network and Space Systems
Richard Currier, SVP, Business Development, SSL
Laurent Thomasson, Head of Telecom Marketing and R&D Coordination, Airbus Defence and Space
Chris Baran, VP Business Development, Commercial Space, Lockheed Martin
Christophe Wilhelm, SVP Strategy, Thales Alenia Space

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

13:00 // Closing remarks

PART OF THE WORLD SATELLITE BUSINESS WEEK

The Summit for Satellite Financing, along with the Summit on Earth Observation Business, make up the World Satellite Business Week (WSBW), the unique executive meeting place for the leaders of the global satellite communications and information business.

With each sub-event focusing on a separate area of the market, participants represent a whole spectrum of geographical markets and industry sectors and all levels of the value chain – broadcasters and distributors; satellite and telecom operators; investors, financial institutions; service providers; satellite and satellite equipment manufacturers; launch service providers; civil and defense government, space agencies and private users.

World Satellite Business Week Facts & Figures:
• Over 130 senior executive speakers
• 800 attendees representing 40 countries
• 95% of global satellite actors present at summit
• 60% of attendees are CEOs, MDs, CFOs or financiers
• 98% of delegates rated the summit excellent or very good

To find out more about the World Satellite Business Week visit www.satellite-business.com
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