SpeedCast

Wherever You Are

Investor Day

February 6, 2015

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Introduction – Ian Baldwin

Seasoned financial professional with relevant ASX-listco experience at resource & energy company

Ian Baldwin
Chief Financial Officer

Background and Experience

- Ian Baldwin joined SpeedCast in December 2014. Ian has more than 17 years of experience in senior finance positions across a range of industry sectors.
- Previously Ian spent over 4 years with an ASX-listed company, serving most recently as the CFO of the Resources & Energy division in Australia & New Zealand.
- Ian holds a Bachelor of Science (Hons) from Hull University and is a Fellow of the Institute of Chartered Accountants in England & Wales.

Agenda

- Introduction
- Corporate Overview
- Maritime Industry
- Energy Sector
- Enterprise and Emerging Markets
- Satellite Industry Dynamics
- Conclusion

SpeedCast

Wherever You Are

Investor Day – Corporate Overview

February 6, 2015

Introduction – Pierre-Jean Beylier

SpeedCast

Industry veteran with extensive management experience across multiple areas of technology and telecommunications companies

Pierre-Jean Beylier
Chief Executive Officer

Background and Experience

- Pierre-Jean Beylier has been with SpeedCast since December 2000, first leading Sales & Marketing activities and then as CEO since July 2004.
- Pierre-Jean worked previously at Rhodia and Black & Decker, where he held successive Sales & Marketing positions, spearheading global strategy initiatives.
- Pierre-Jean Beylier holds an MBA from the University of Southern California & Lyon School of Management in France.

Overview of SpeedCast

SpeedCast

A leading provider of satellite-based communication networks and services in the Asia Pacific region and the global maritime industry

- Designs, implements, integrates, operates and maintains predominantly satellite–based communication networks
- Serves over 1,000 customers across over 3,000 terrestrial sites, predominantly in Asia Pacific, and approximately 1,700 offshore rigs and vessels with satellite services
- Operates a communications network with global reach, comprised of leased space segment on 41 different satellites and utilizing 28 teleports
- A leading operator in the Asia Pacific region and the global maritime industry — headquartered in Hong Kong
- Focuses on tailored solutions to five customer segments: telecom, maritime, natural resources, government & NGO, and enterprise

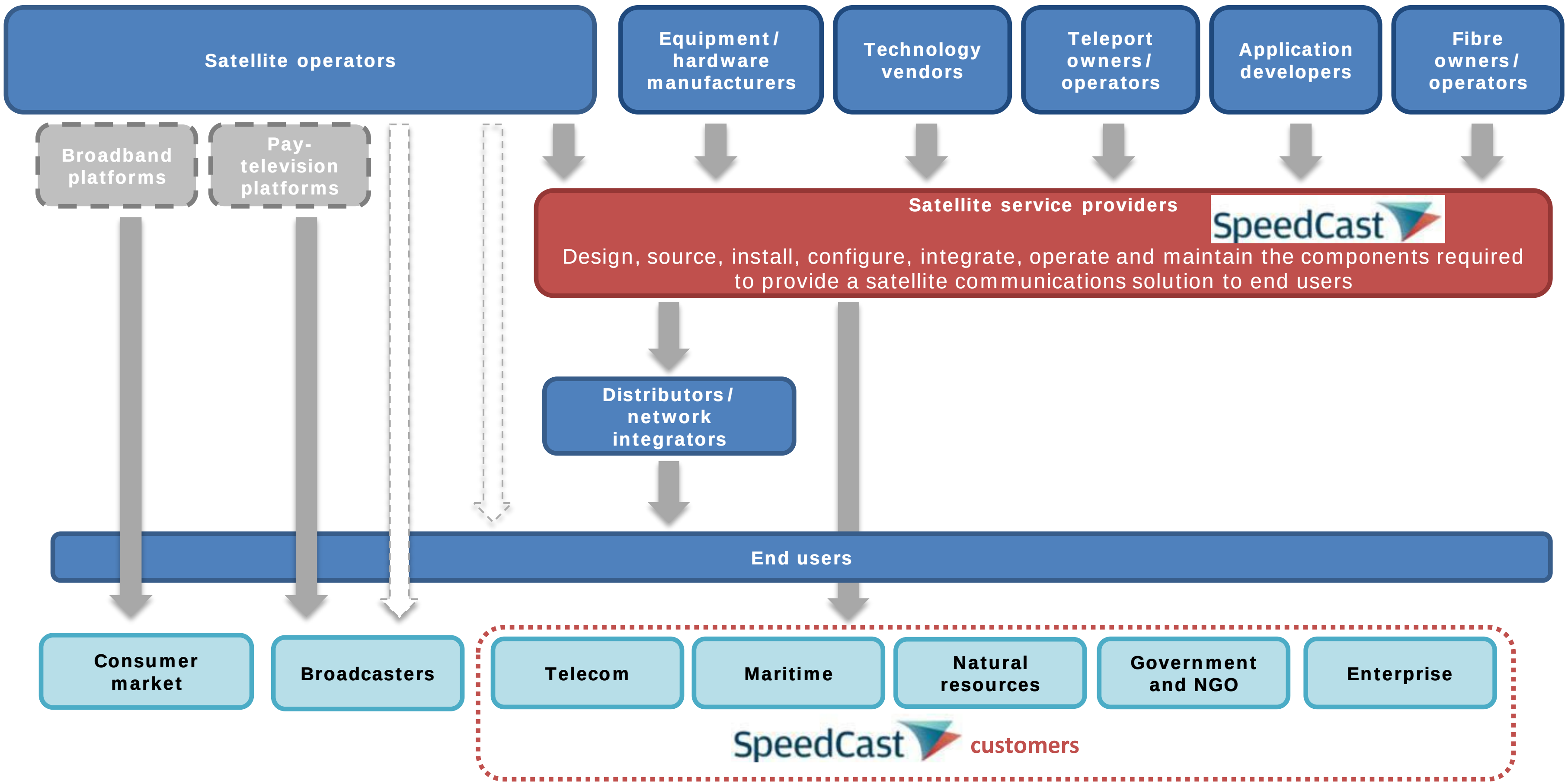
Key highlights

SpeedCast

1 Strong underlying fundamentals and high growth end markets	▪ Growing internet usage globally and additional bandwidth requirements ▪ Increasing automation and sophistication of mission critical systems, emergence of the digital oil field ▪ Growing focus from governments and international organisations to bridge the "digital divide" ▪ Regulatory and operational requirements in maritime driving adoption of services
2 Strong track record of growth	▪ A strong track record of revenue and earnings growth – 36% FY2011-FY2013 pro forma EBITDA CAGR ▪ High operating leverage and benefits from increasing scale – Increase in EBITDA margins in FY2011 (11%) to FY2013 (16%)
3 Demonstrated track record of successful integration of acquisitions	▪ Demonstrated ability to Successsfully integrate acquisitions and drive capability and scale benefits – Three material acquisitions (ASC/Elektrikom/Pactel) in 2012 and 2013 and two small bolt-ons in 2014
4 Fragmented industry dynamics	▪ SpeedCast operates in highly fragmented markets, comprised largely of providers focused on either specific countries or particular customer segments ▪ SpeedCast considers that it is well positioned to benefit from future strategic acquisition opportunities as they arise
5 Strong competitive position	▪ A strong and sustainable competitive position – Global network and infrastructure footprint and relationships – Established brand and reputation – Economies of scale
6 Highly experienced management team	▪ Led by PJ, who has been with SpeedCast for 14 years, including 10 years as Chief Executive Officer

Satellite service providers are a critical link in the satellite industry value chain

Satellite industry value chain

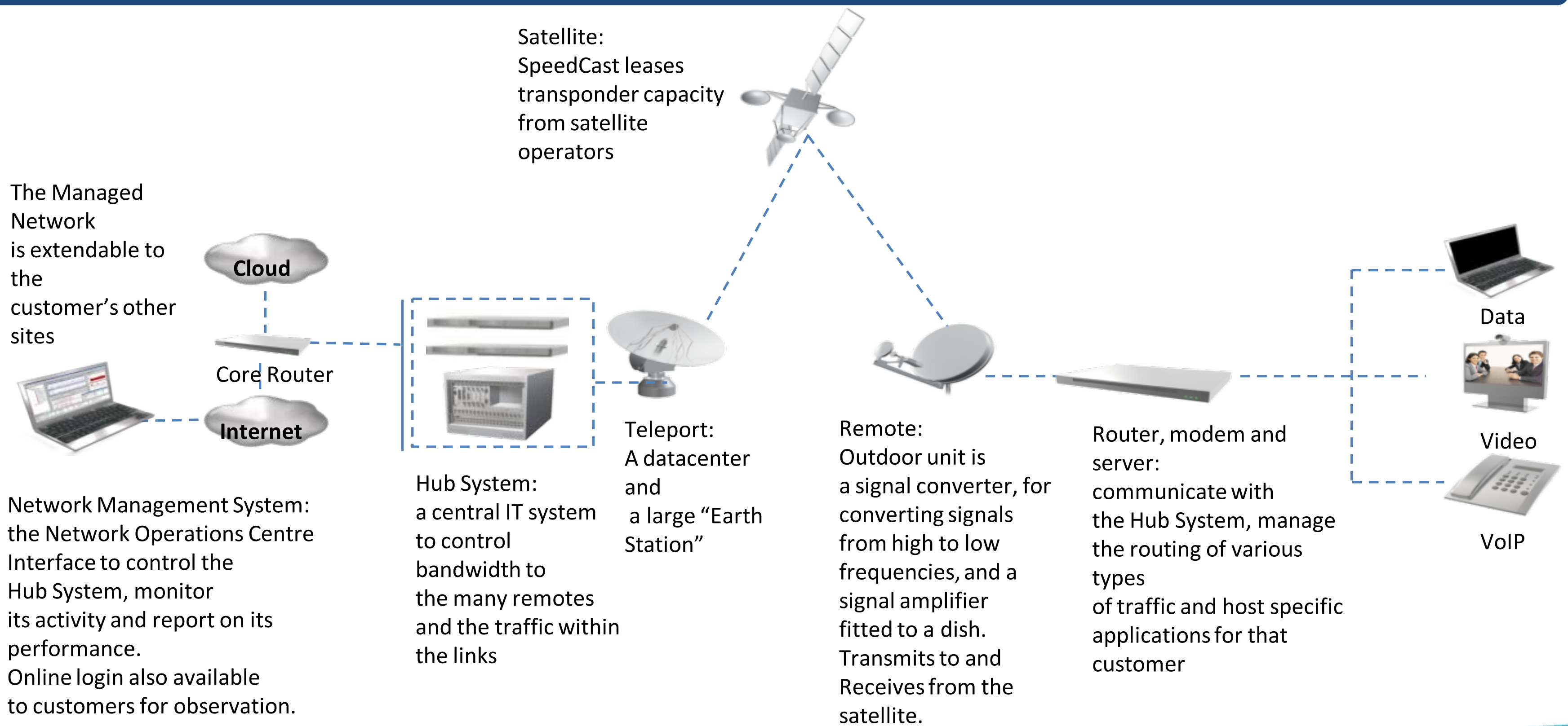


Satellite service providers are a critical link in the satellite industry value chain (cont.)

SpeedCast

SpeedCast provides the necessary infrastructure and capabilities to turn satellite capacity into a useful network service for a wide range of end users

Illustrative SpeedCast VSAT network setup



Competitive landscape

SpeedCast

The markets in which SpeedCast operate are highly fragmented

Asia Pacific VSAT market

Selection of key competitors in SpeedCast's main Asia Pacific VSAT markets

Large VSAT service providers	RigNet	Harris Caprock	
Mid-sized VSAT service providers	ITC Global	PCCW	
Smaller VSAT service providers	Optus	Patrakom	PSN
	AJN Solusindo	AST	Baycom

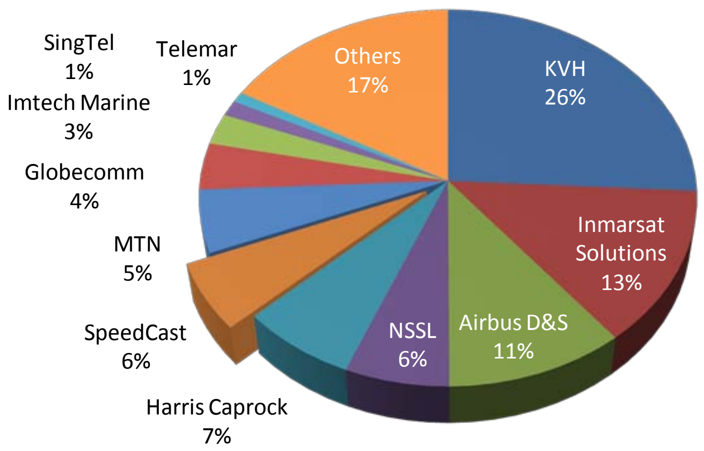
Note Not an exhaustive list

Plus a large number of smaller domestically focused participants

- A limited number of international operators, such as SpeedCast
- No competitor with a regional focus on Asia Pacific that matches the scale of SpeedCast

Maritime

Maritime VSAT market share in 2013 by number of terminals



Source: Euroconsult, *Maritime Telecom Solutions by Satellite, 3rd Edition* (2014)

- Approximately 60 providers actively servicing customers
- Top 10 VSAT providers account for approximately 83% of installed terminal base — followed by long tail of providers with an installed base of 100 vessels or less
- SpeedCast the sixth largest maritime VSAT provider in 2013

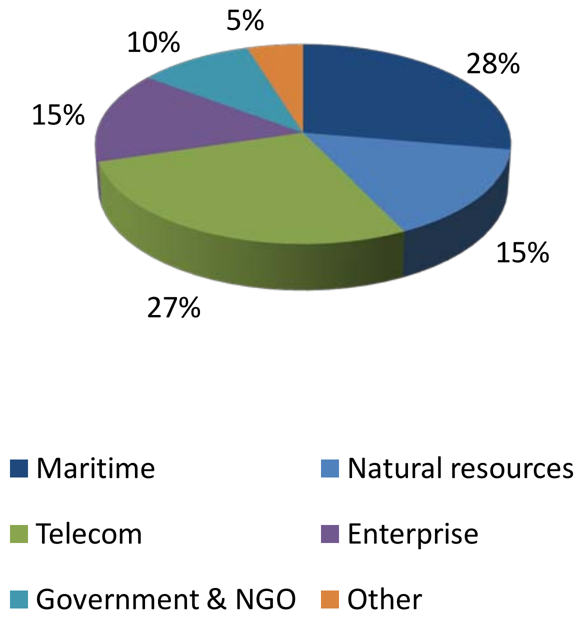
A focus on five key customer verticals

	Telecom	Maritime	Natural Resources	Government & NGO	Enterprise
Example customer industries					
	▪ ISPs ▪ Telcos ▪ Resellers	▪ Shipping ▪ Oil & Gas ▪ Government ▪ Yachting	▪ Oil & Gas ▪ Mining ▪ Construction ▪ Engineering	▪ Military & Defense ▪ Emergency services ▪ Education ▪ Rural connectivity	▪ Large Enterprises ▪ Banking sector

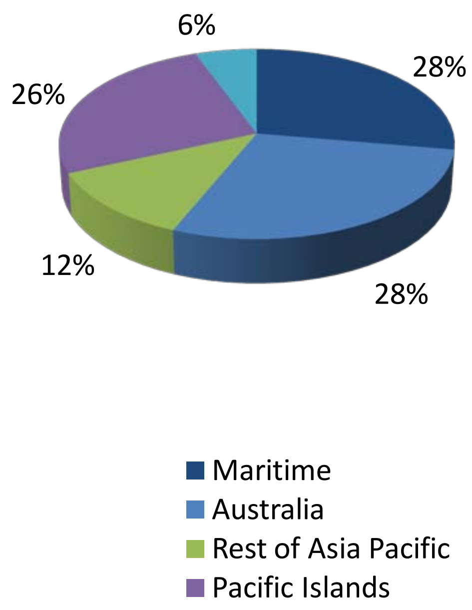
The common theme across verticals — increasing demand for data connectivity as the way businesses use technology changes

A diverse business with various growth engines

1H FY2014 pro forma service revenue (by customer vertical) excluding Afghanistan



1H FY2014 pro forma service revenue (by customer geography) excluding Afghanistan



Carrier grade, high quality global network

One of the largest buyers of satellite capacity in Asia Pacific. Bandwidth requirements are actively managed and scale drives significant operating efficiency.

SpeedCast's satellite network, teleports and offices

Headquarters

Teleport

Fibre Backbone Capacity

Service & Support Office

Satellite Coverage

- 41 satellites within our network
- 28 teleport locations
- 16 sales and support centers
- Customers in over 60 countries

Business model evolution

SpeedCast

A significant investment in platform and capabilities

Product capability investment

Early days…..

Generalist satellite service provider offering primarily internet access services to the small-medium enterprise market to capitalise on the growing internet usage

Ongoing investment in networks, technology enhancement and platforms to provide greater bandwidth, flexibility and sophistication

Today…..

Specialised provider targeting larger enterprise customers in specific industries that demand high reliability, significant support and complex, often customised solutions

- Adaptability
- Diverse end markets
- Diverse geographies
- Enhanced capabilities

Acquisitions

- Australian Satellite Communications (acquired 2012)
- Eletrikom (acquired 2013)
- Pactel (acquired 2013)
- SatComms (acquired June 2014)
- Oceanic (acquired July 2014)

A strong Board of Directors

The Board of Directors has extensive relevant experience in technology and telecommunications, and experience on the Boards of both listed and unlisted companies

John Mackay
Independent Non-executive Chairman

- Appointed to Board in 2013 and as Chairman in 2014
- Current director of ASX-listed property developer CIC Australia
- Previously the Chairman and former CEO of ACTEW corporation and former CEO, Chairman and founder of its joint venture with AGL

Grant Ferguson
Independent Non-executive Director

- Appointed in 2013
- Previously CEO of Astro Overseas Ltd, CFO of Astro All Asia Networks Plc, Managing Director at Temasek Holdings, CFO of Total Access Communications (Thailand) and Treasurer for the First Pacific Group

Michael Malone
Independent Non-executive Director

- Appointed to the Board in 2014
- Founder and former CEO of iiNet
- Winner of the WA Information Technology and Telecommunications Awards lifetime achievement award in 2005
- In 2006 was awarded the Business News Award for the most outstanding business leader in WA under 40

Peter Jackson
Non-executive Director

- Appointed in 2012
- Currently a Non-executive Director of AsiaSat, where until 2012 he was Executive Chairman
- 40 years of experience in the satellite and telecommunications sectors including 20 years with Cable and Wireless and CEO of AsiaSat

Edward Sippel
Non-executive Director

- Appointed to the Board in 2012
- Managing Director of TA Associates and Co-Head of TA Associates in Asia
- Has served on the Board of Directors of many public and private companies globally

Michael Berk
Non-executive Director

- Appointed to the Board in 2012
- Managing Director of TA Associates
- Also serves as a director of Dealer Tire, the Professional Warranty Service Corporation and Towne Park

A seven member board — inclusive of CEO — and further supported by William Barney as a Senior Board Adviser

SpeedCast Vision

What SpeedCast will look like in three years time ?

- **Undisputed leader in satellite service provision in the Asia Pacific region**
- **Top 5 global player**
- **Top 3 global maritime player**
- **Top 3 global energy player**

Multiple levers driving sustainable growth

SpeedCast

Unchanged growth focused strategy

Underlying market growth	▪ Strong underlying fundamentals ▪ High growth end markets
Market share gains in targeted verticals	▪ Maritime ▪ Energy ▪ Partnerships with global telecom operators
Geographic and customer diversification / penetration	▪ Strong strategic position in Asia Pacific from which to grow ▪ Existing satellite coverage in Africa and Middle East—following Asia -Pacific customers wherever they operate ▪ Aeronautical market taking off
Continued product innovation and value-added services	▪ In-house product and software development capabilities ▪ Established partnerships with technology vendors
Strategic acquisitions / bolt-ons in a fragmented market	▪ Highly fragmented markets ▪ Track record of M&A execution ▪ Cost and revenue synergies

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Investor Day - Maritime

February 6, 2015

Introduction – Andre Eerland

Seasoned industry veteran with over 25 years experience in maritime and satellite communications

Andre Eerland
Vice President Maritime

Background and Experience

- André has more than 25 years of experience in the maritime industry and over 20 years of experience in satellite communications.
- Andre joined Elektrikom in 1993 and rose to the role of General Manager, before becoming part of the SpeedCast executive management team.
- André holds a university degree of applied science in Rotterdam, Netherlands.

Maritime satellite communication market today

SpeedCast

121,000
Addressable vessels

68,000
Merchant ships

6,500
Passenger ships

8,500
Offshore rigs and support vessels

70+ VSAT service providers

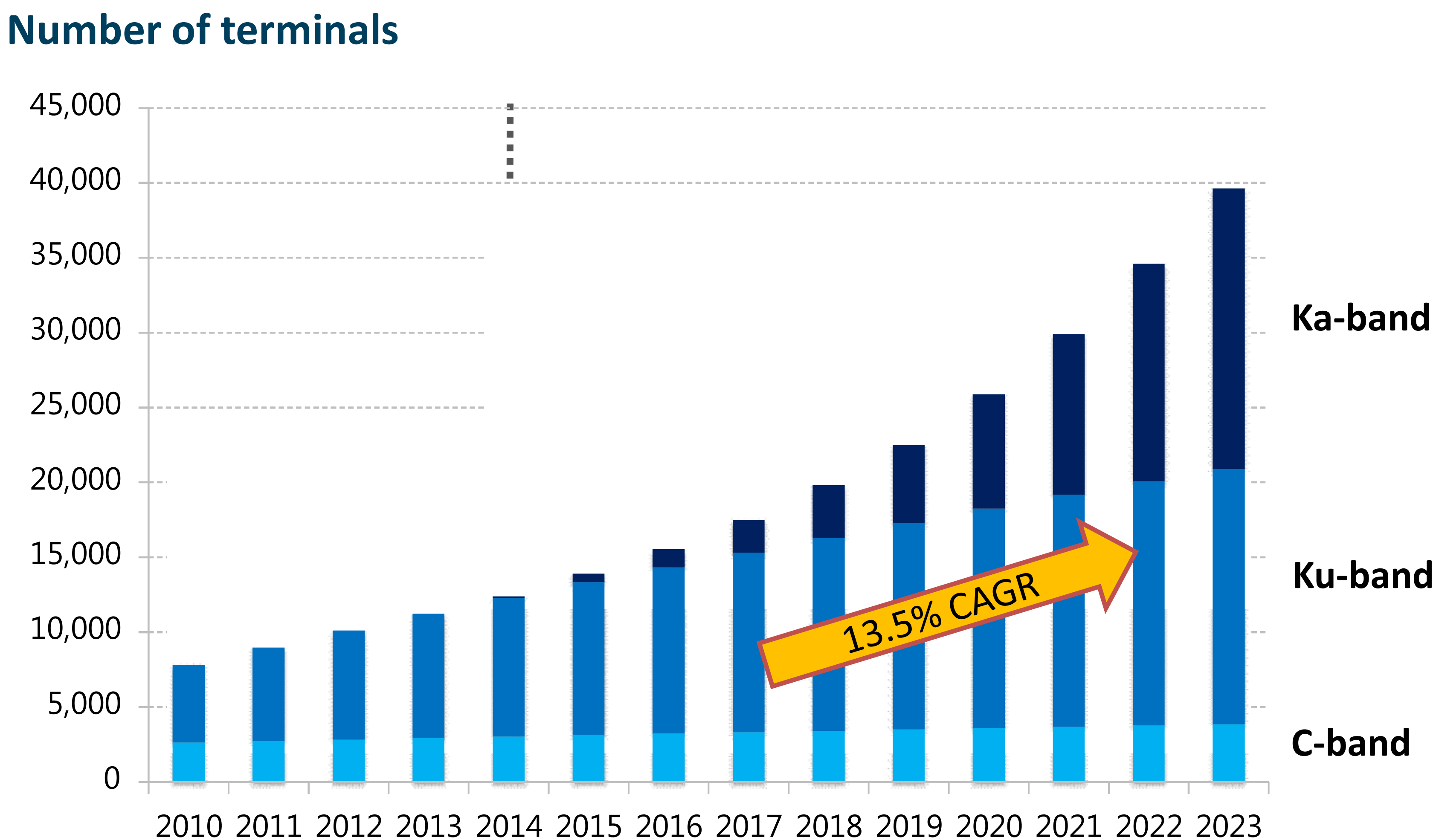
11,000
VSAT terminals

337,000
MSS terminals

$760 million
revenues for satellite operators

Number of active maritime vsat terminals by frequency band (2010-2023)

SpeedCast



Mobile Satellite Communications © Euroconsult 2014

SpeedCast Maritime Market Segments

SpeedCast

Merchant Shipping

Research & Survey Vessels

Fishing

Cruise

Oil & Gas Platforms & OSVs

Navies

Ferries

Yachts

Industry Growth Drivers

SpeedCast

VSAT addressing growing data connectivity requirements in maritime

Crew welfare

- Access to social media, entertainment and phone calls important to attract and retain new generation of seafarers
- VSAT fixed fee model for unlimited usage model more financially feasible than MSS cost per usage model commonly used in MSS services

Operational requirements

- On-board IT systems becoming more complex
- Remote controlling of ship functions via satellite (e.g. "digital oil fields") cost effective for ship owners
- Older communication technologies cannot support applications such as weather forecasting and video surveillance

Regulatory requirements

- High data requirements of core navigational systems
- Regular updatesof electronic navigation maps
- A communication tool to co-ordinate efforts to tackle piracy

VSAT for Operational Efficiency

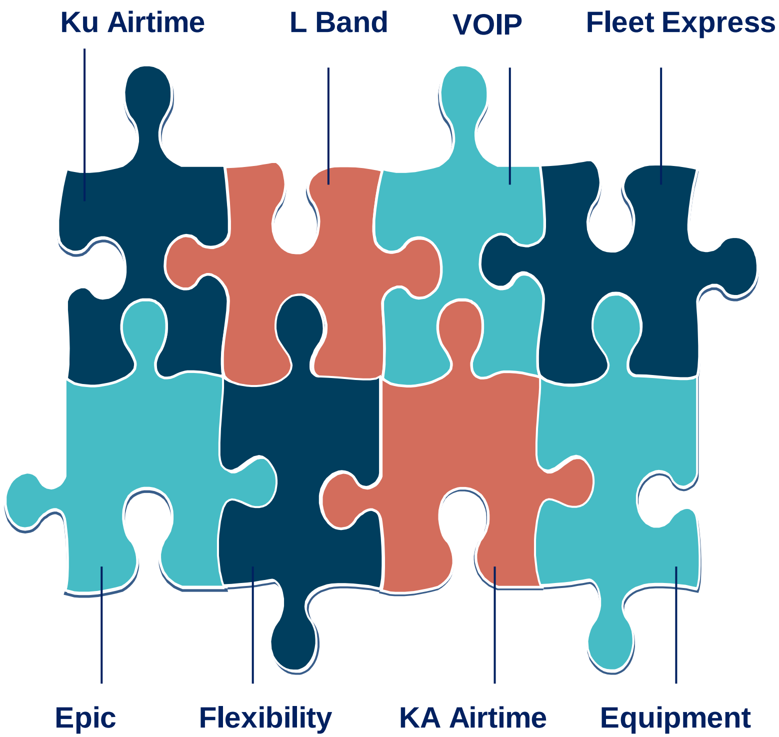
Use of connectivity on board

- **Network Access - Corporate & Crew**
  - Email communications
  - VOIP
  - Internet access

- **Operational Management**
  - Data replication
  - Shipping management
  - Operations and Safety

- **Remote Monitoring – M2M**
- **Remote IT Support & Training**

The Flexible Supplier of the Future

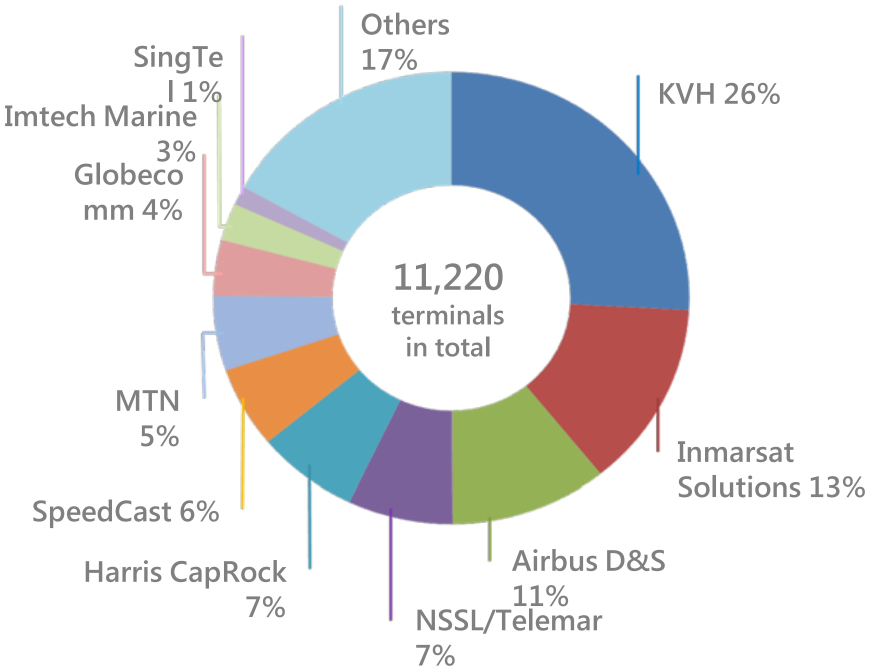


- Global and regional Ku-band and C-band coverage to meet the demands of the industry
- Ka-band global coverage
- Introduction of high throughput satellites to maximize efficiency (supplier agnostic)
- Quality of the network/service
- 24/7 experienced support team
- Flexible and customised bandwidth plans
- L-band back up with FBB, Iridium Pilot and Iridium Next

Competitive Outlook

SpeedCast

Maritime VSAT service providers – Market share 2013



KVH

- Proprietary system – small terminals resulting in higher bandwidth cost
- Biggest number of vessels equipped
- Content play

Airbus

- Technology agnostic approach similar to SpeedCast
- An estimated 1500 vessels on its VSAT network
- Biggest Inmarsat customer for L-band services
- Direct and indirect sales strategy

Inmarsat

- Launching a proprietary ka-band service
- An estimated 2000 vessels on Ku-band, including SpeedCast service
- Core business as MSS satellite operator: wholesale model

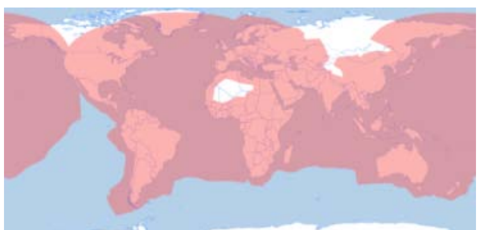
Harris Caprock

- Leading provider to the oil & gas sector
- In maritime, focused on OSVs and cruise
- Challenging integration into Harris

What differentiates Speedcast: CUSTOMER FOCUS

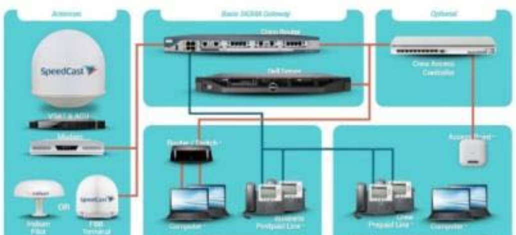
- Flexibility and agility
- Technology and frequency agnostic approach
- Only provider with two global networks
- Best global network in the industry (coverage + redundancy)
- Strong IT capabilities
- High customer satisfaction
- Worldwide presence

Maritime Market Trends



Coverage, Quality and Speed

Coverage, Quality and Speed are now the battle grounds for VSAT customers. High Throughput Satellites solutions will result in higher speeds and bandwidth efficiency.



VSAT as a Standard

VSAT is now recognized as a standard offering for any maritime communications solution.

Migration from L-band

Use of L Band Services as the main form of communication has already started to decline and will continue to decline as VSAT coverage and quality increases.

Success in 2014

SpeedCast

EMAS – Lewek Champion

Success in 2014

SpeedCast

GEARBULK – 50 vessels lease

Success in 2014

SpeedCast

Allseas – Pieter Schelte

Biggest offshore support vessel in the world

Success in 2014

SpeedCast

MAERSK – 70 Vessels

Success in 2014

Arab Maritime Petroleum Transport Company

Success in 2014

M/Y Adora | 40 Yachts

Success in 2014

SpeedCast

Strategic partnership signed with:

inmarsat

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Wherever You Are

Investor Day - Energy

February 6, 2015

Introduction – Keith Johnson

SpeedCast

Industry veteran with extensive relevant experience in technology and telecommunications for Oil & Gas and Energy customers

Keith Johnson
Senior Vice President, GM Energy

Background and Experience

- Appointed to head SpeedCast Energy Division in October of 2014
- Industry experience: 28 years in Energy Communications,
- 6 years as President of Energy 2007-2013 at Harris Caprock

Initial Focus and Plans

- Establish Energy HQ office in Houston, Texas
- Establish US legal entity
- Engage Key Energy Customer
- Qualified Vendor as a Preferred Supplier
- Build the Team – experienced and trusted Energy Personnel

Key Focus and Leadership Approach

- Satisfy the Customer, Deliver the Profit, and Grow the Team!
- Trust, Commitment, Communication, Execution, and Care
- Global Teamwork and Culture are key!

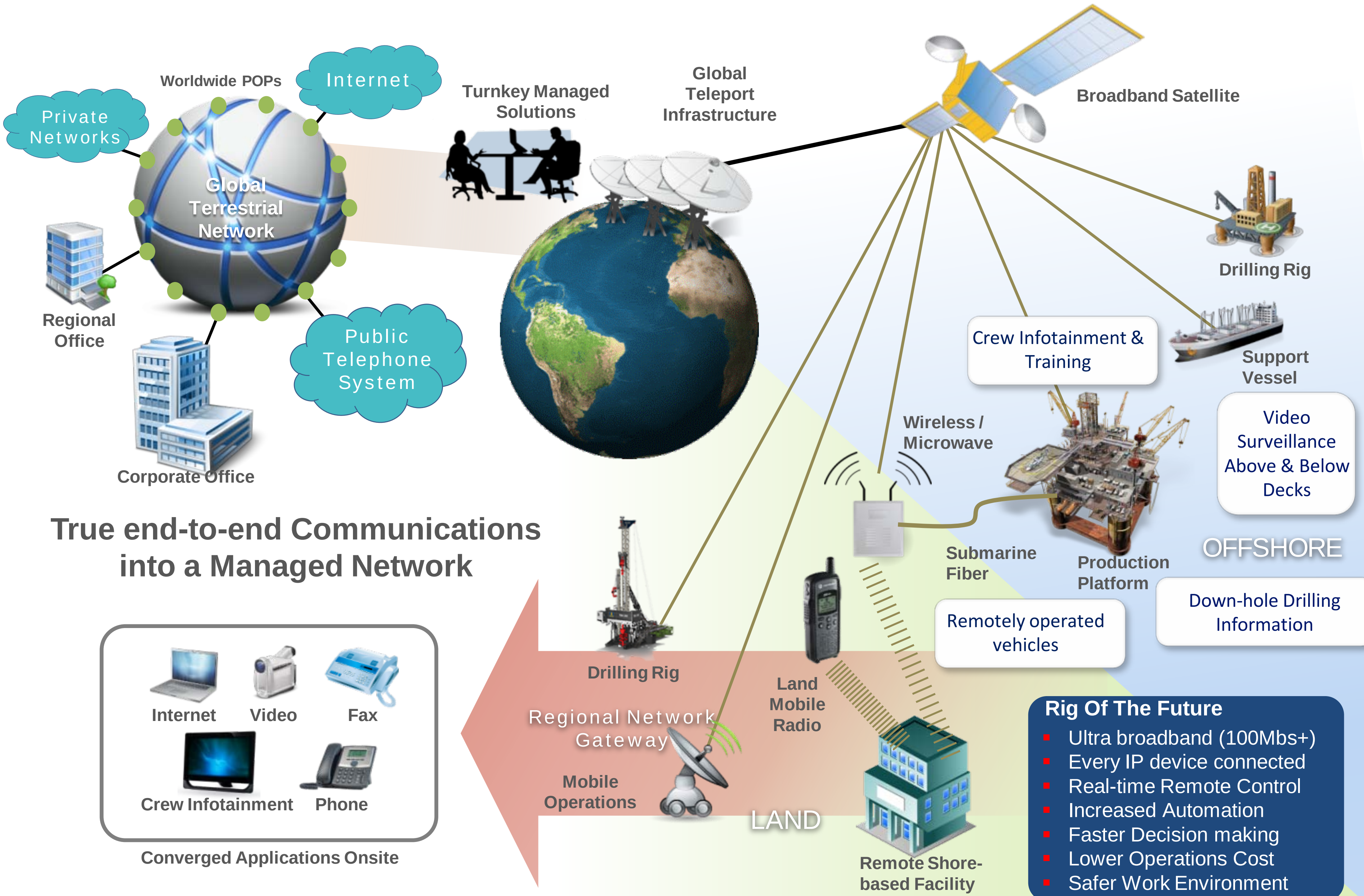
Energy Industry Needs for Satellite

SpeedCast

- **Remote locations where access to terrestrial networks is not availble**
  - Drilling and production assets are offshore or in remote land locations
- **Mobility requirements where assets are in transit**
  - Assets like Rigs and Service Vessels are constantly moving locations
- **Need for a standarized network for geographically dispersed assets**
  - Satellite offers a standard network for all remote assets to communicate
- **Growing demand for connectivity**
  - Remote operations and control is increasing demand for bandwidth: emergence of the digital oil field
  - Fewer workers at the remote site reduces HSE (Safety) and costs
  - Growing demand for video surveillance and conferencing
  - Crew Moral needs for internet access and voice calls at remote sites

The oil & gas industry needs satellite to operate

Emergence of the Digital Oil Field



Energy: Typical Remote Site Requirements

SpeedCast

Deep Water Drilling

- High-bandwidth requirements
- Multi-tenant opportunities
- Real-time data & video critical
- Less price sensitive
- Continual Transit requirements
- Highest revenue and profit sites
- Large crew moral requirements

Shallow Water Drilling

- Basic voice, data, Internet
- Small crew morale services
- Significant number new builds
- More price sensitive
- Regional competition
- Wireless services compete

Land Based Drilling

- Phone and Internet connectivity
- Expedited field support
- Easy service set-up
- Fixed rate pricing plans
- Wireless alternatives compete
- Growing demand in the US

Photo Source: Transocean & Pride websites

Energy Drilling Fleets: The Value Chain

SpeedCast

OPERATOR

- Most important
- Manages Operations
- One Per Rig
- High BW Users
- 12 month+ Contracts

SERVICE COMPANY

- Completes Well Sites
- Multiple Per Rig
- Short-Term Contracts
- Low – Med BW user

OTHER PARTIES/USERS

- Onboard Crew
- Catering Personnel
- Helicopter Supplier
- Daily Rates

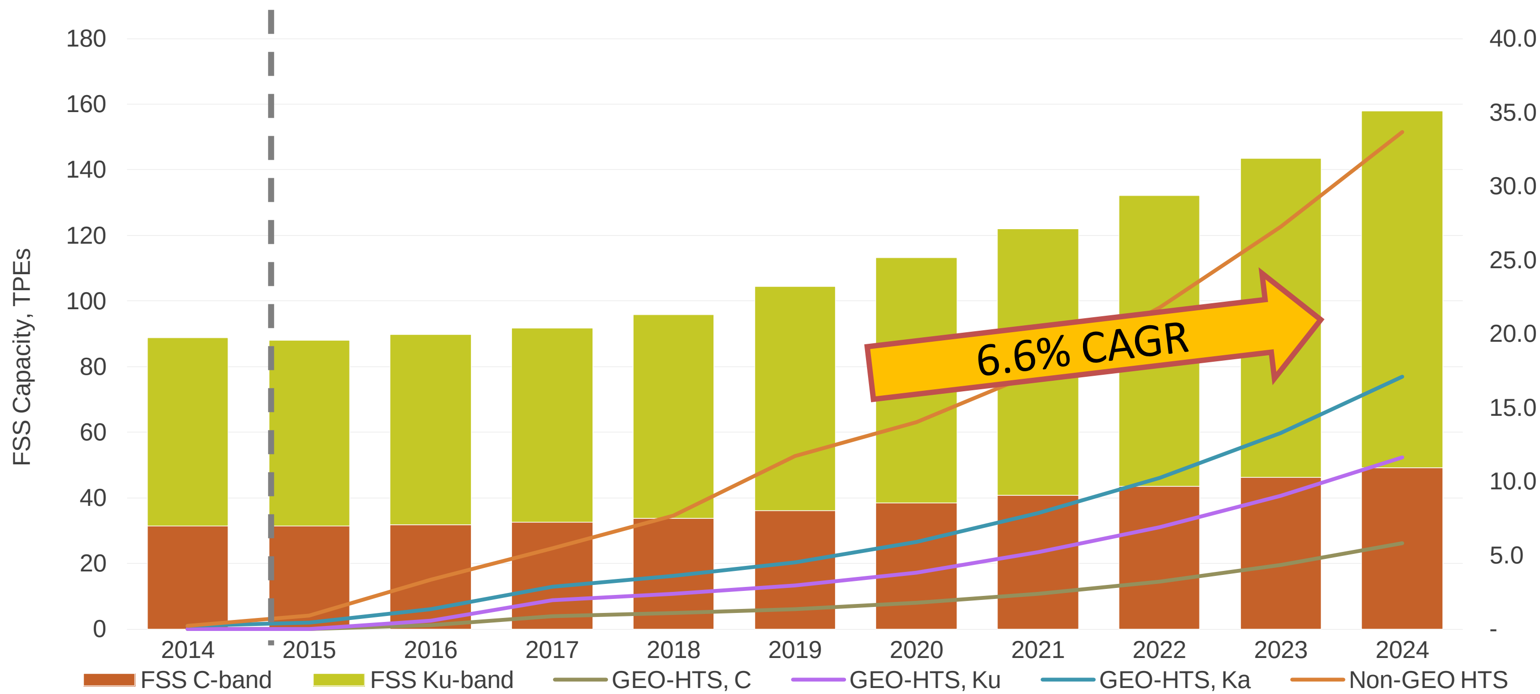
DRILLING COMPANY

- Owns and Manages the Rigs
- Typically First to Install VSAT Service
- Critical to Secure for Add-On Opportunities
- Multi-Year Contracts
- Global and Regional Fleet Opportunities

Multi-tenant Approach:

Providing Secure, Reliable Connectivity to the Multiple Parties Required for a Successful Drilling Operation

Energy Markets – Growing Satellite Capacity Needs



Source : NSR

Energy Markets, Capacity Demand By Bands

Growth Drivers for Satellite Communication

SpeedCast

Crew welfare

- Access to social media, entertainment and phone calls important to attract and retain new generation - remote workers
- Energy companies are using this as a differentiator to attract and retain the workforce, therefore satellite bandwidth demand will continue to grow.

Operational requirements

- On-board IT systems becoming more complex
- Remote controlling of drillship and platform functions via satellite (digital oil field) is continuing to grow, thereby requiring additional satellite bandwith
- Older communication technologies cannot support applications such as video conferencing and surveillance
- Realtime drilling technology is increasing the requirement for satellite bandwidth to allow large amounts of data to be transmitted to shore

Regulatory requirements

- The BP Macondo (Gulf of Mexico) incident has increased the amount of data required by federal law to be stored for each offshore site.
- Increased HSE legal requirements and new applications have been implemented to ensure greater safety and welfare of the workers, thereby requiring additional satellite bandwidth

Competitive Outlook

SpeedCast

Harris CapRock

- Global market leader, $350-400M in Energy Revenue
- Strong in Energy, Maritime, and Government
- Long-term energy contracts will expire over the next 12 - 18 months

RigNet

- Global Energy player, second to Harris CapRock
- Totally focused on Energy, onshore and offshore
- Strong global Sales Team

ITC Global

- Starting to be perceived as a global player
- Strong in Africa, GOM, Australia
- Strong Sales Team with Energy and Mining Expertise

Emerging Markets Corp. (EMC)

- Strong position in Africa, South America
- PE Partner is ABRY (ex Caprock investor)
- Recent departure of their President
- Strengths in Carrier, NGO, and land-based Enterprise customers

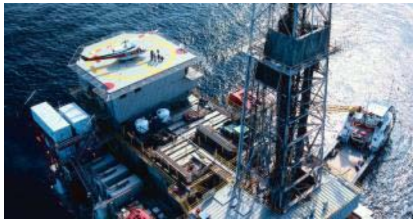
Hermes

- Exclusively focused on Energy
- Existing contracts with major European and Global Operators
- Strong presence in a number of difficult countries that are key to energy companies: Africa, Central Asia and ME
- Lack of scale

Why Energy? – A powerful additional growth engine

- **Leverage our Maritime infractructure to further develop a growing market segment**
  - Enhance SpeedCast existing global satellite networks
  - Bandwidth on existing sites is growing: emergence of the “digital oilfield”
  - Growing exploration in emerging markets where SpeedCast is strong
  - Energy is one of the largest customers of the satellite industry

- **Window of opportunity to gain market share, primarily from Harris Caprock**
  - Need for an alternative service provider following the merger of Caprock and Schlumberger GCS by Harris
  - Challenging integration into Harris (Government contractor)
  - Energy slow down creates a compelling event for customer to change provider - cost-cutting measures
  - SpeedCast has a very low market share in the oil & gas sector



We aim to build a major global player servicing the Energy sector

What differentiates SpeedCast: CUSTOMER FOCUS

- **Relationships and Trust: Customer Trust**
  - Relationships drive the Energy market
- **Entrepreneurial and Agile Approach: Customer Service**
  - Willingness to add value by extending our reach beyond satellite and by customizing
  - Organizational structure designed for quick decisions / responsiveness
- **Publicly listed company: Customer Confidence**
  - Increases the customer confidence in the quality of financial reporting and in the Company's stability
- **Competitive price advantage: Customer Value**
  - Scale and current margin levels allow for competitive pricing opportunites to gain market share
- **Leadership position in the Asia-Pacific region**
  - Growing region for the Oil&Gas industry

SpeedCast
Wherever You Are

Investor Day – Enterprise & Emerging Markets

February 6, 2015

Introduction – Richard Carden

Industry veteran with extensive experience in telecommunications and financial industries in APAC

Richard Carden
Senior Vice President, Global Sales & Marketing

Background and Experience

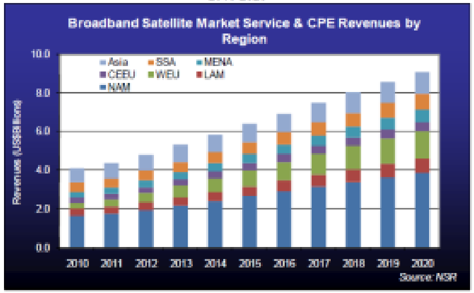
- Richard Carden joined SpeedCast as the SVP Sales & Marketing in 2013.
- Carden leads SpeedCast's Global sales & marketing organization focused on reinforcing the company's competitive position, driving synergies across the merged organization, plus growing revenues and market share.
- Richard has over twenty five years International sales and senior management experience in the Telecoms and financial industries, the last 15 years based in APAC.

Global Trends for VSAT

SpeedCast

- **Global satellite enterprise VSAT market** forecast to be a **$6+ billion** market in **2016.** (Includes equipment, managed services, as well as services revenues.)
- **Global satellite enterprise VSAT market is growing considerably faster than** its major industry **competitors**- traditional telecom wireless and wireline networks, and mobile satellite L-Band solutions**.**
- **North American** and **European** markets **are very mature** and maintain a predominately replacement growth rate, while **Asia-Pacific, Africa** and the other world regions **are growing at a rapid rate**.
- Most major vertical markets for this industry are seeing revenue growth; but **maritime, oil and gas**, and **cellular backhaul are seeing the most rapid growth.**
- **Ka-Band High Throughput Satellites** (HTSs) **expected to impact this market** as new levels of bandwidth are coming online for the VSAT industry, globally, now and in the coming years.

Exhibit ES.2 Broadband Satellite Market Service & CPE Revenues by Region Chart, 2010-2020

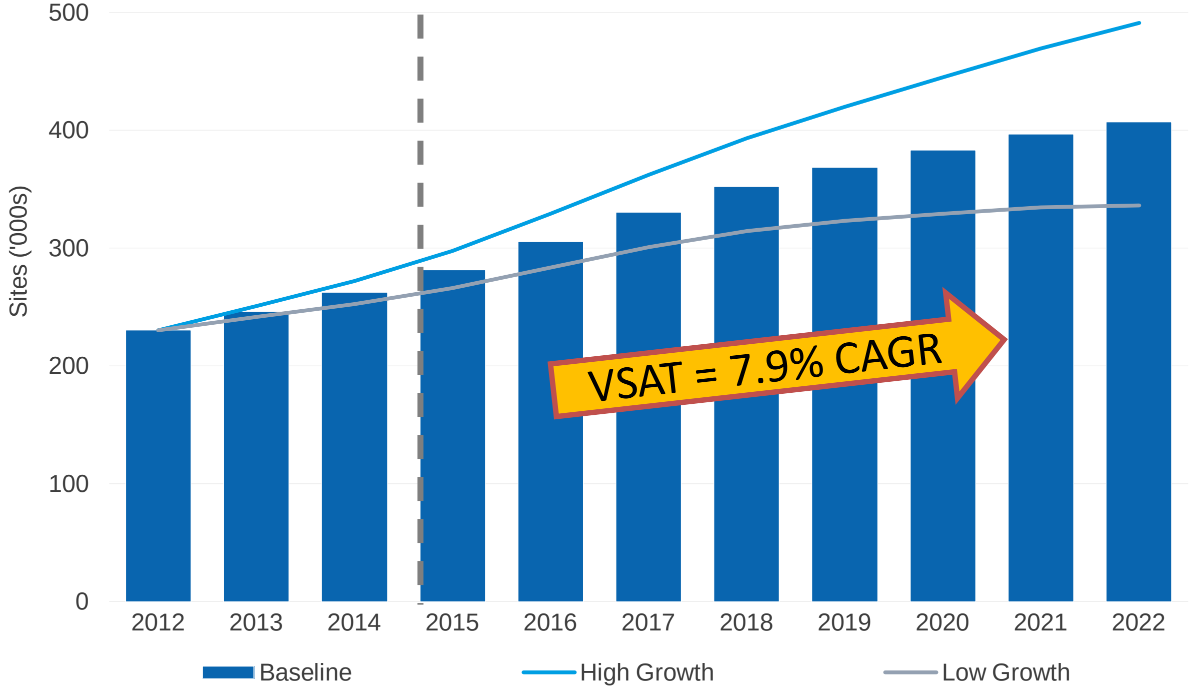



Maritime


Energy / Oil & Gas

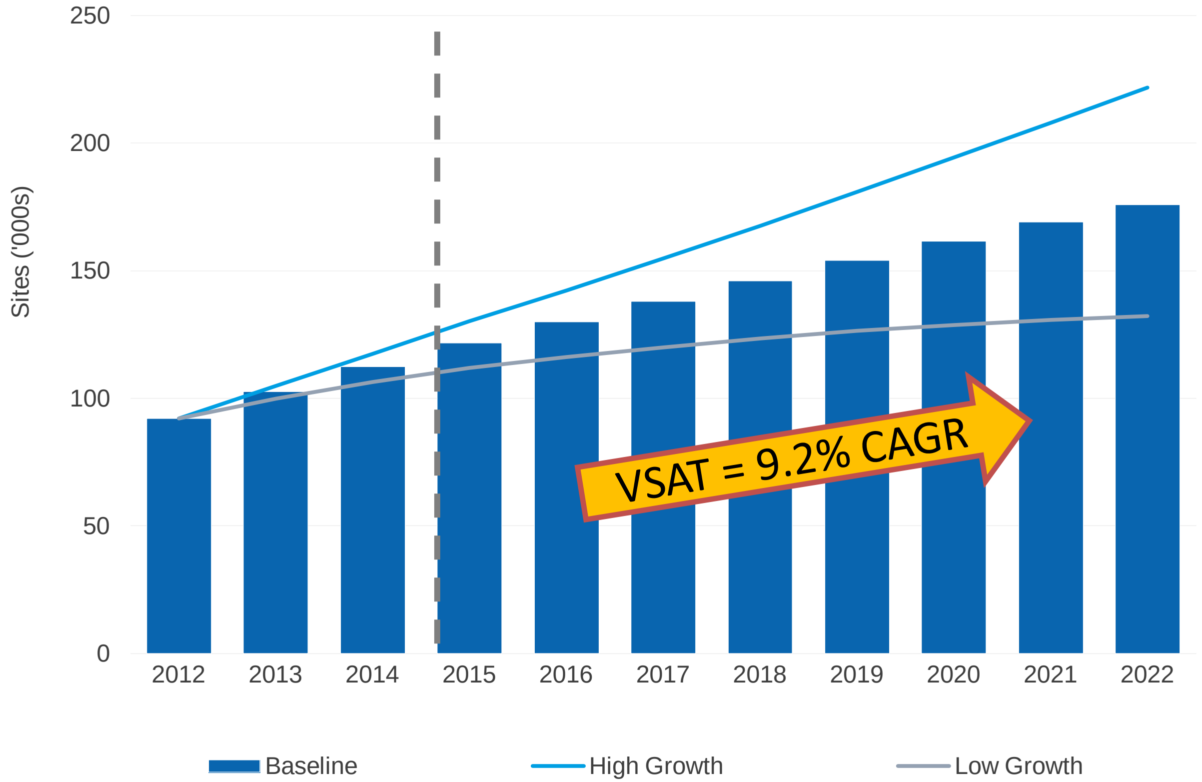

Cellular

Asian Two-Way Broadband VSAT Growth



Asian Two-Way Broadband VSAT Sites, 2012-2022

MENA two-Way Broadband VSAT Growth



Middle Eastern & North African Two-Way Broadband VSAT Sites, 2012-2022

NSR Broadband Satellite Markets 12th Edition

Enterprise & Emerging Markets, Still a Growth Engine

Enterprise & Emerging Markets

- Land revenues outside of maritime/energy account for 57% of SpeedCast business and provide a substantial growth opportunity

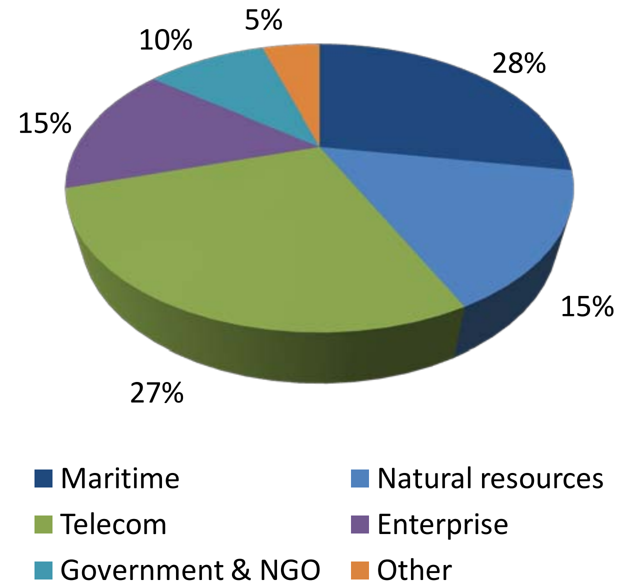
Trends Supporting Growth

- Overall demand for increased bandwidth
- Political stability and instability

Major Growth Areas

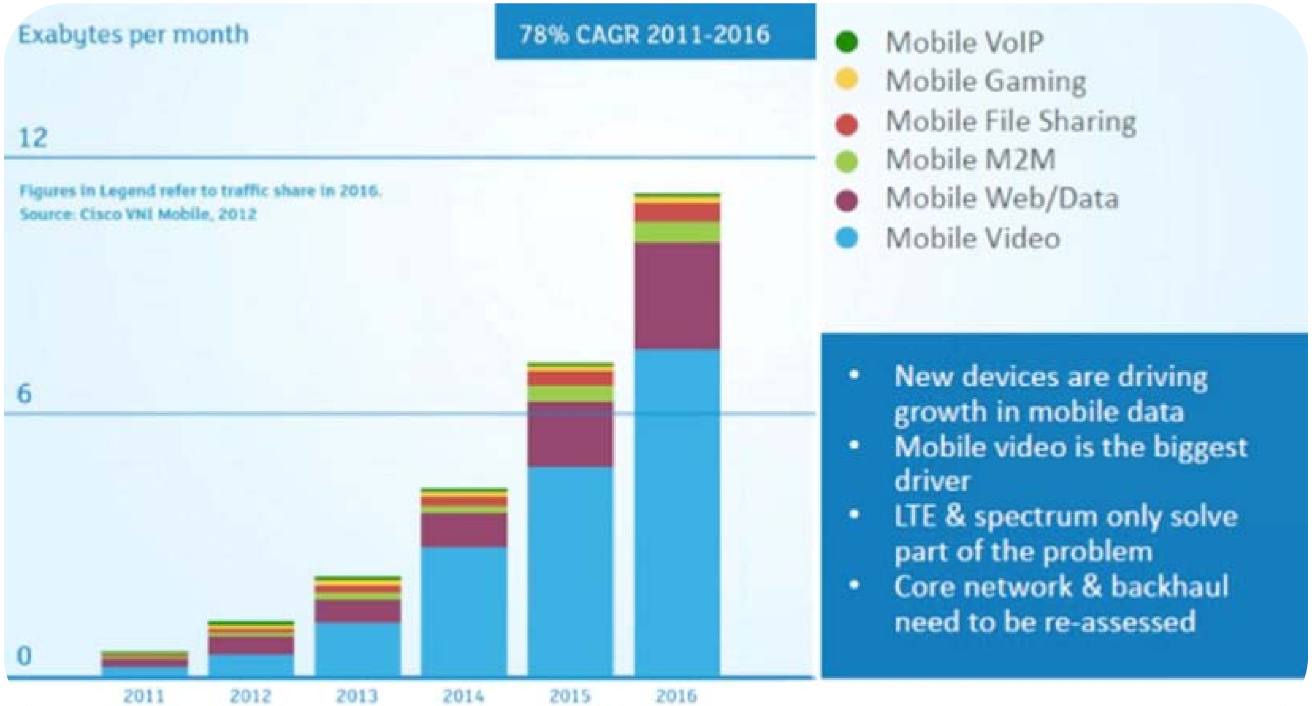
- Cellular backhaul
- Satcoms outsourcing for telcos
- Emerging vertical segments: Aero & M2M
- Connecting islands
- Emerging Asian markets
- Geographic expansion – new frontiers

1H FY2014 pro forma service revenue (by customer vertical) excluding Afghanistan



Trends Supporting Bandwidth Growth

- **Increasing Demand for Bandwidth**
  - Huge increase in demand for bandwidth - largely driven by smartphones, facebook, youtube video etc.
  - All existing customers are continually looking for more and more bandwidth
  - SpeedCast has 1000 customers all looking for more bandwidth and the latest technology



High Speed Data Trends

	Upstream		Downstream		Aggregate	
Rank	Application	Share	Application	Share	Application	Share
1	BitTorrent	36.35%	Netflix	31.62%	Netflix	28.18%
2	HTTP	6.03%	YouTube	18.69%	YouTube	16.78%
3	SSL	5.87%	HTTP	9.74%	HTTP	9.26%
4	Netflix	4.44%	BitTorrent	4.05%	BitTorrent	7.39%
5	YouTube	3.63%	iTunes	3.27%	iTunes	2.91%
6	Skype	2.76%	MPEG - Other	2.60%	SSL	2.54%
7	QVoD	2.55%	SSL	2.05%	MPEG - Other	2.32%
8	Facebook	1.54%	Amazon Video	1.61%	Amazon Video	1.48%
9	FaceTime	1.44%	Facebook	1.31%	Facebook	1.34%
10	Dropbox	1.39%	Hulu	1.29%	Hulu	1.15%
		66.00%		76.23%		73.35%

Table 2 - Top 10 Peak Period Applications - North America, Fix

The BYOD Trend

SpeedCast

BEFORE

- **Employee use of company owned computers**
  - Using laptops to access the Internet
  - Drove usage policies and technology controls
- **RIM BlackBerry delivers first mobile device**

NOW

- **Proliferation of Mobile Devices accessing company network**
- **BYOD is making significant inroads in the business world:**
  - 75% of employees in high growth markets such as Brazil and Russia
  - 44% in developed markets

…are already using their own technology at work

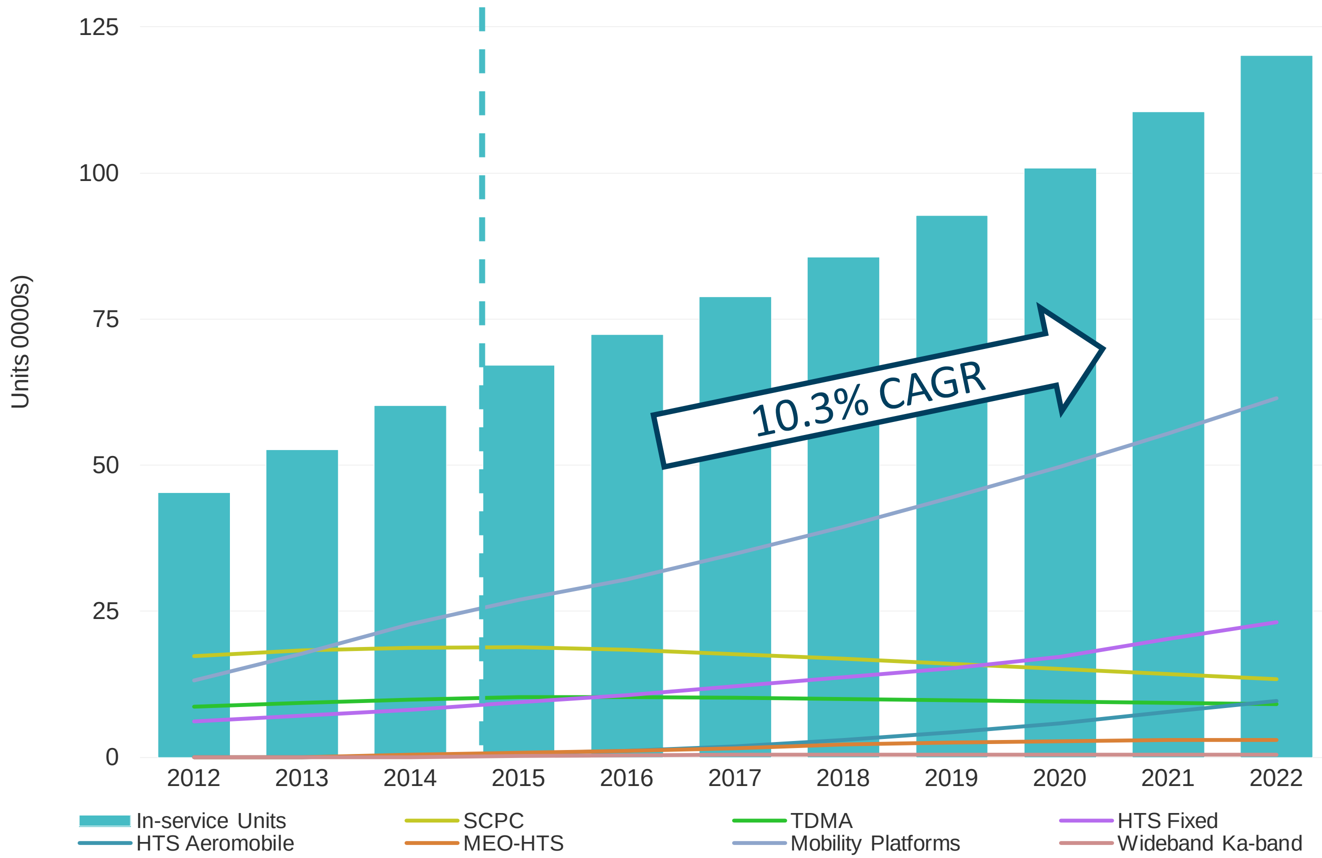
Political Stability and Instability

- **Political Stability**
  - Significant increase in opportunities in Afghanistan & Pakistan over last 12 months as political situation has become more stable and confidence starts to return
- **Political Instability**
  - Significant increase in opportunities in Iraq over last 12 months due to political instability

Key Markets – Cellular Backhaul

- **Cellular Backhaul**
  - Established markets still looking to satellite to increase coverage to more remote areas, Japan, Philippines, Indonesia, Malaysia, Australia...
  - Emerging markets rapidly rolling out mobile networks, Myanmar, Pakistan, Bangladesh, some Middle East nations
  - Government initiatives sponsoring extending coverage to remote areas, Malaysia, Australia, Myanmar...
  - Outsourced operations, a growing number of mobile operators looking at outsourcing the satellite part of their cellular network

Global Wireless Backhaul In Service Units, 2012-2022



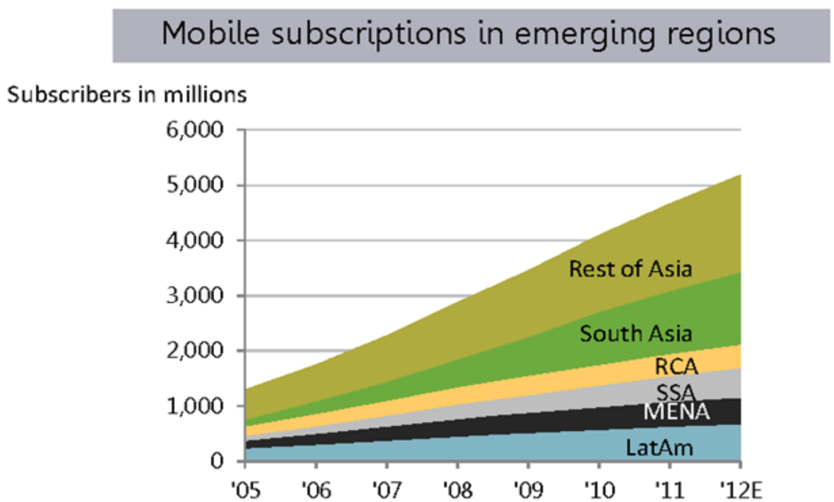
Source : NSR

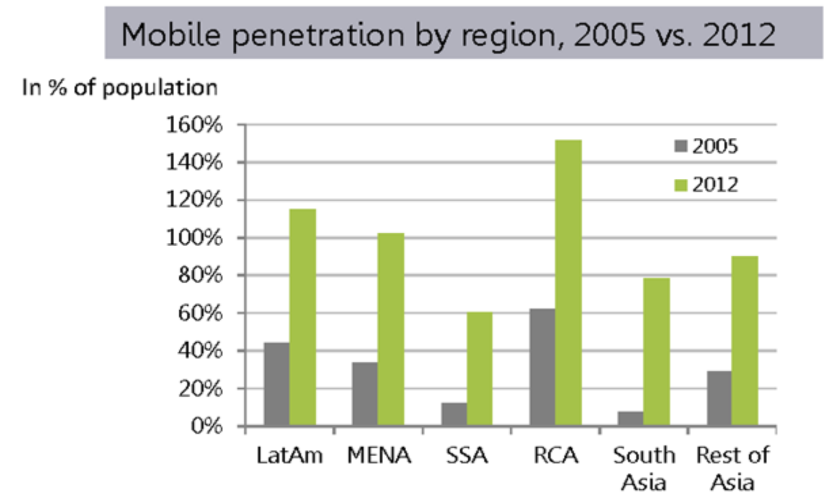
Global Wireless Backhaul In-service Units, 2012-2022

Cellular Backhaul – Explosive Growth for Mobile Services in Emerging Regions

SpeedCast

- **Global cellular market at over 6.8 billion subscribers in 2012**
- **Subscriber growth has been accelerating with growth strongly driven by emerging regions**
- **Asia-Pacific accounts for over half of global subscribers today and has been the fastest growing regions in recent years**
- **Global mobile penetration stands now at over 95%**
- **Penetration across Asia Pacific varies strongly from country to country (e.g. Vietnam at ~160%; PNG at ~35%)**
- **Average penetration rates in Asia are at 80-90%**





Key Markets – Satcoms Outsourcing for Telcos

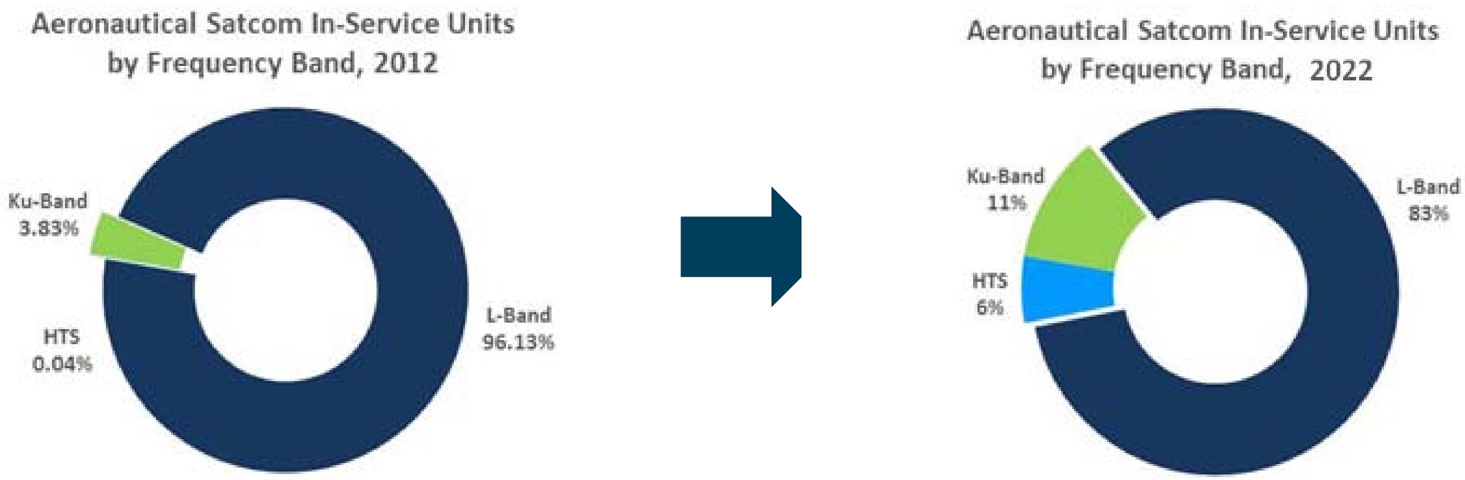
SpeedCast

- **Outsourced solutions**
  - Many global MNCs are looking to outsource their entire IT and network infrastructure to global Outsourced Solutions Services (OSS) providers
  - SpeedCast cannot address this market directly but can access thru global telecoms operators
  - Global telecoms operators usually have limited satellited capabilities, if any, and therefore need to outsource that part of the network to a global satellite service provider
  - ATT, BT, OBS, Verizon, GCX (Reliance), Telstra, NTT all global OSS providers now enaged with SpeedCast

at&t BT verizon GLOBAL CLOUD XCHANGE A RELIANCE COMPANY

orange Business Services NTT docomo

New Markets – Aeronautical



Aeronautical Satcom In-Service Units by Frequency Band, 2012-2022

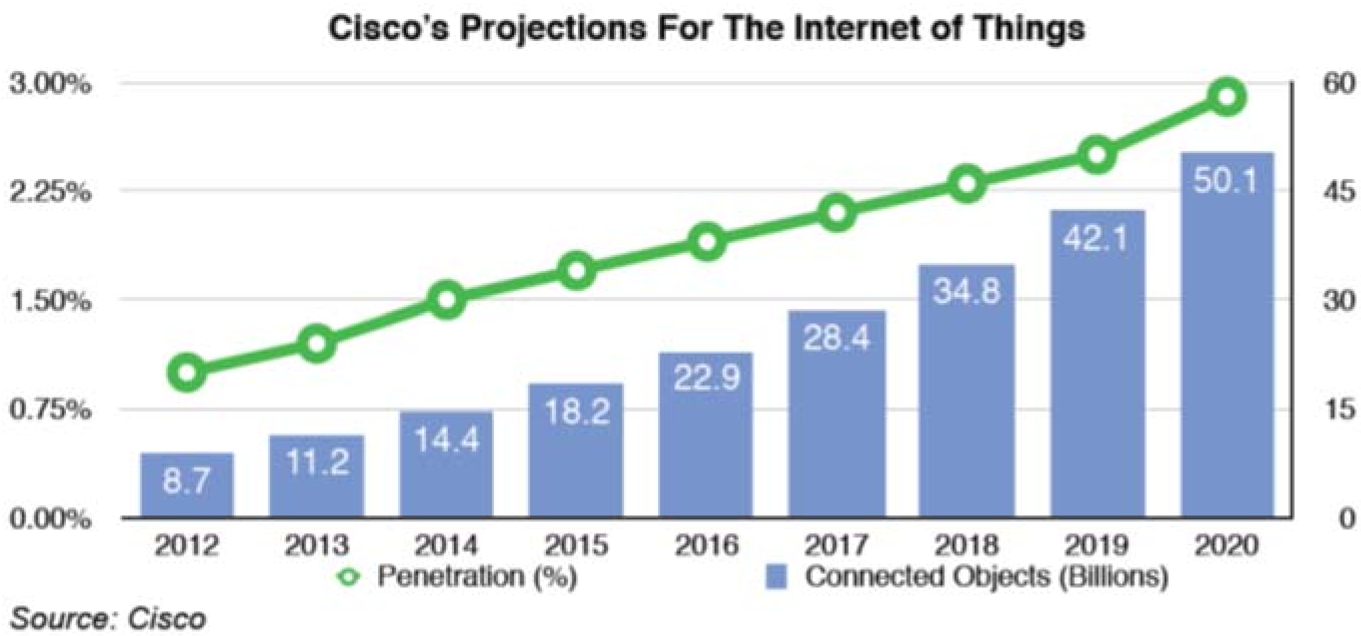
- **In-service units will be added over the next ten years at a 6.3% CAGR**
- **Retail revenues will inch up to $3.4 billion in 2022**
- **Bandwidth demand across Ku-band and HTS will grow significantly by the end of 2022 and reach $670 million in revenues**

NSR Aeronautical Satcom Markets, 2013

New Markets – M2M and Internet of Things

SpeedCast

Projected to reach 50.1 billion connected objects by 2020



M2M – Cisco's Projections for Internet of Things

- **High Throughput Satellites will change the cost structure and make satellite services more attractive**

Cisco Systems – IBSG Group, Internet of Things, 2014

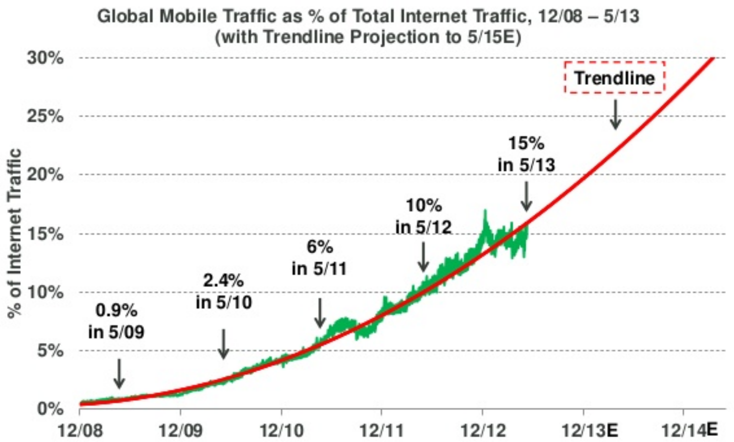
Key Markets – Asia Pacific Islands

- **Connecting Islands**
  - Pacific region is thousands of islands that will never be fully fibred, currently only a few islands have fibre, PNG, Vanuatu, New Caledonia, American Samoa, Fiji, Tonga and French Polynesia
  - Strong driver to provide all communites access to the internet for commercial, education and health reasons
  - Asian markets with large populations over thousands of islands, Indonesia (17,000 islands) & Philippines (7,107 islands)

Growing internet usage globally

- Growing internet usage globally generally via satellite in countries with no access to fibre
- Satellite adopted as a reliable back-up to fibre broadband
- User experience and requirement for fast, dedicated networks encouraging adoption of enterprise network systems
- SpeedCast providing a combined fiber-satellite solution in some cases

Mobile Traffic Surging for Internet Access

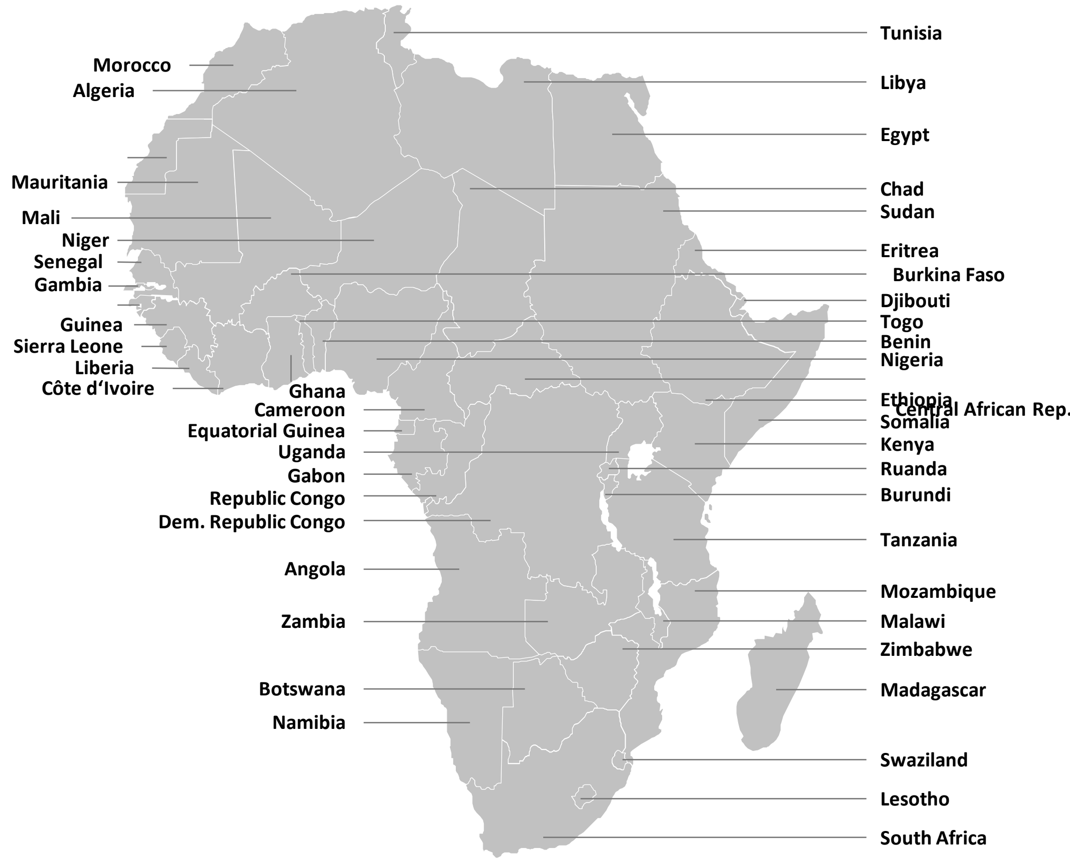


Key Markets – Emerging Asian Markets

- **Emerging Asian Markets**
  - Myanmar,
  - Central Asian states,
  - Mongolia,
  - New geographies opening up for SpeedCast

New Frontiers

- **Geographic Expansion**
  - New opportunities in markets that have been traditionally underserved by SpeedCast but still provide substantial opportunity; Africa is the most obvious new frontier



Major Customers

SpeedCast

- Mobile operators
- Enterprise customers
- Governments
- NGO
- Telecom Companies
- ISP's
- Mining
- Aero

Recent Wins

SpeedCast

Oktedi Mining
- Mining in PNG

Wilmar Sugar
- Enterprise in Myanmar

Fujitsu
- Government in Afghanistan

China Mobile Pakistan
- Cellular backhaul in Pakistan

DLT
- Government (education) in the Middle East

SpeedCast

Wherever You Are

Investor Day – Satellite Industry Dynamics

February 6, 2015

Satellite Industry Dynamics

- **Industry consolidation ongoing but fragmentation remains significant**
- **New generation satellites: High Throughput Satellites (HTS)**
- **Strong capacity supply expected in the next few years**
- **Enhanced bandwidth efficiency thanks to HTS and innovation in VSAT technologies**
- **New verticals emerging: M2M, Aero, Trains,...**

SpeedCast
Wherever You Are

Investor Day – Conclusion

February 6, 2015

SpeedCast Well Positioned for Sustained Growth

- **Strong growth potential across SpeedCast's diverse customer base**
  - Maritime services will continue to grow thanks to high adoption of VSATs amidst penetration rates that remain low
  - The oil & gas sector present compelling opportunities for SpeedCast to gain significant market share and become a top 3 global player
  - Outsourcing is gaining momentum (cellular operators, telecom operators,...)
  - SpeedCast's strong leadership in Asia-Pacific positions us well to capture significant growth in that region
  - Emerging markets and new frontiers are to be exploited
  - Most geographic and vertical markets where SpeedCast operates are growing

- **SpeedCast will continue to gain in scale and operating leverage**

- **Our industry remains fragmented: there continues to be numerous M&A opportunities to strengthen our growth potential**

- **Experienced management team and Board of Directors to ensure good execution**

Thank You

SpeedCast
Wherever You Are