SpeedCast

Wherever You Are

Investor Day

January 28, 2016

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Agenda

- **Introduction**
- **Corporate Overview**
- **Enterprise and Emerging Markets**
- **Operations Overview**

Break

- **Energy**
- **Maritime**
- **Conclusion and Q&A**

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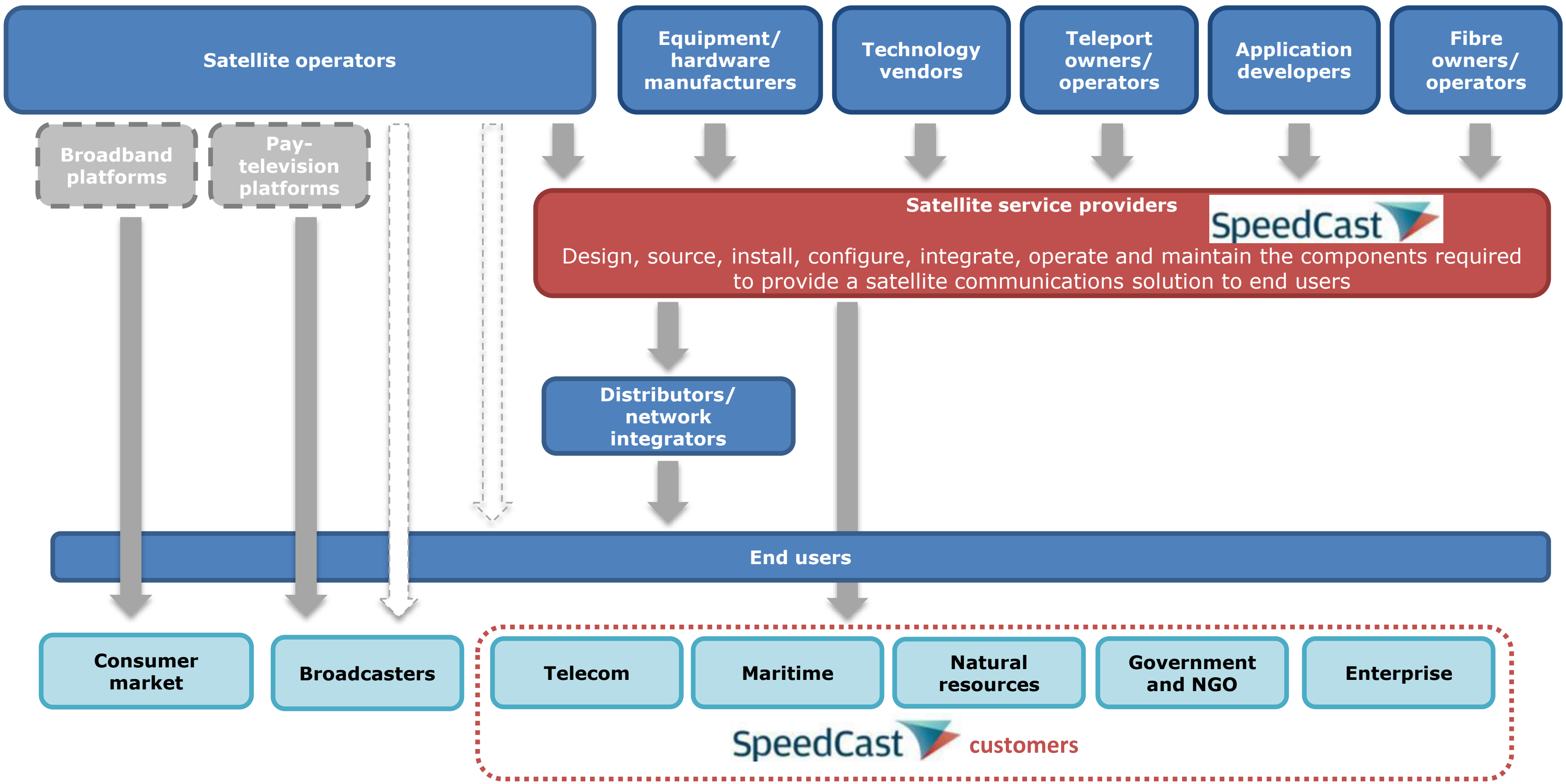
Investor Day – Corporate Overview

January 28, 2016

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

Satellite industry value chain

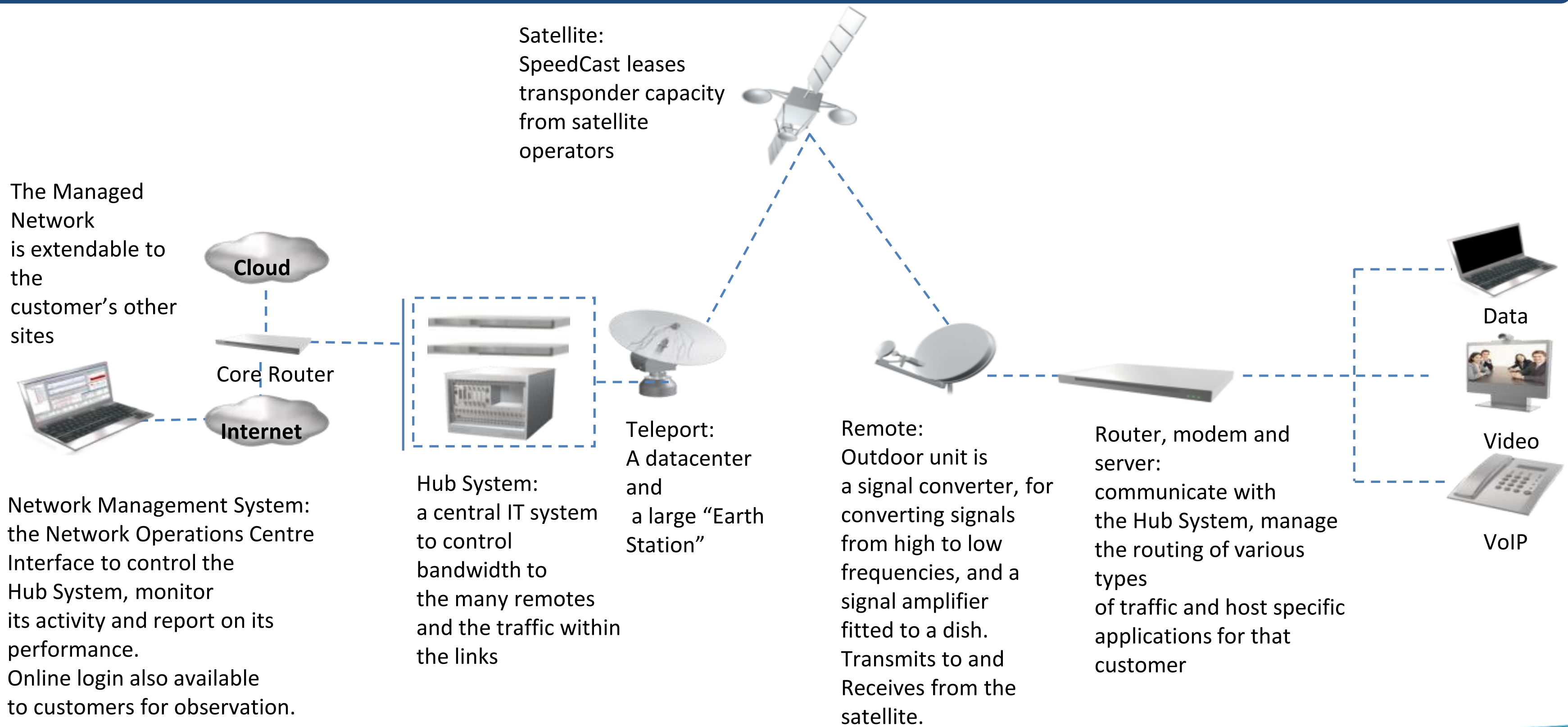


Satellite service providers are a critical link in the satellite industry value chain (cont.)

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

- Fragmented market with hundreds of small services providers
- Consolidation in motion, mostly with large players acquiring smaller players so far
  - EMC acquisition of MTN being a recent deal between larger players
- Several Top 10 global players are private equity owned
- Energy focused players declining and cutting costs but still generating healthy profits
- SpeedCast viewed as the biggest consolidator so far, focusing on small-medium sized targets
- Telcos less and less focused on satellite services and therefore outsourcing more and more

A focus on five key customer verticals

ENTERPRISE & EMERGING MARKETS

	ENERGY	MARITIME	Telecom	Government & NGO	Enterprise
Example customer industries					
	▪ Oil & Gas ▪ Green energy	▪ Shipping ▪ Oil & Gas ▪ Government ▪ Yachting	▪ ISPs ▪ Telcos ▪ Resellers	▪ Military & Defense ▪ Emergency services ▪ Education ▪ Rural connectivity	▪ Large Enterprises ▪ Mining ▪ Construction ▪ Banking sector ▪ Media

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

Overall Growth Strategy

- **Continued investment in maritime**
- **Accelerated prospection in energy market thanks to the resources added in 2015. Competition's difficulties and customers' hunt for cost savings create opportunities for SpeedCast.**
- **New investment in Enterprise & EM with focus on a few industries and emerging markets**
- **Targeting of key global accounts leveraging SpeedCast newly acquired global capabilities**
- **Development of new revenue streams via an expanded product offering**
- **Further consolidation of our global network at all levels: teleports, satellites, terrestrial network.**
- **Continued building of our M&A pipeline**

Multiple levers driving sustainable growth

Continuous 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 globally, following our customers
- Aeronautical market
- Media market

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 and integration
- Cost and revenue synergies to be achieved

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

Key Success Factors

- Scale in order to achieve cost competitiveness
- Successful integration of acquisitions to achieve revenue and cost synergies
- Combining global reach and local presence
- Retention of key staff and continuous hire of new talents
- Best-in-class customer service desk
- Agility

Key Risk Factors

SpeedCast

- Price erosion
- Integration difficulties as we continue to acquire companies
- Delays in implementation of large and complex projects
- Failure to attract and retain talents
- Acceleration of market consolidation creating a strong, dominant player in one or more key markets resulting in SpeedCast lacking scale to compete

Integration Process- Workstreams

SpeedCast

1	Sales, sales engineering, product, marketing
2	Field engineering
3	Customer support
4	Operations
5	Service implementation
6	Finance
7	IT
8	HR
9	Legal & Regulatory
10	Project communication

COLLABORATION

TEAM WORK

LEARNING

SHARING

OPTIMIZATION

Key integration activities

"Fully integrate and act as One Company" to:

- Enhance customer experience
- Enable growth and improve market reach
- Increase value generation through revenue synergies and operational & costs efficiencies
- Leverage new talents, skills and best practices

- Implementation of the ERP system
- Consolidation and optimization of our global network
- Roll out of collaboration and communication tools (video conferencing, share point, intranet,…)
- Building of a common culture
- Tax optimization

Performance-based Culture

Speed...

Customer Focused

Agile and Responsive

Success through People & Safety

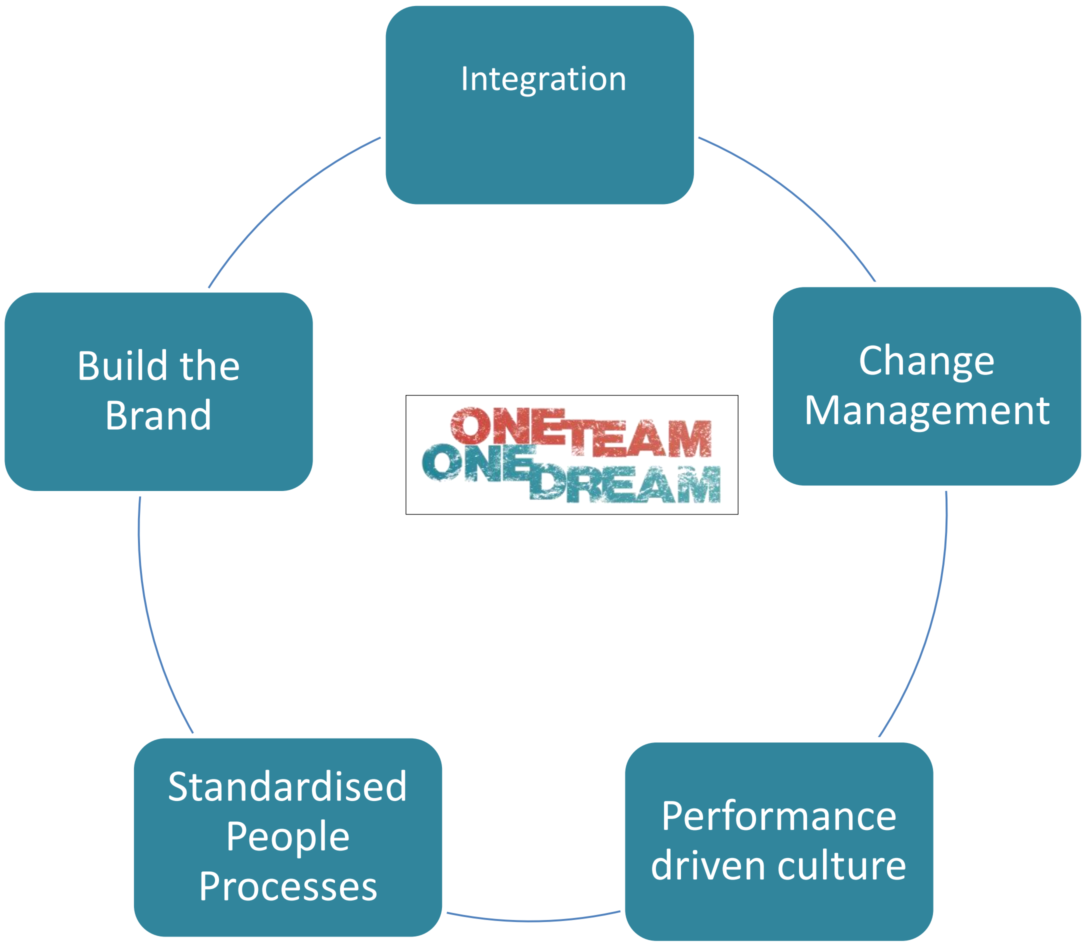
Team Spirit

Aim: Connect as one team with one set of values globally. Aligning people, programs and infrastructure to drive a consistent set of beliefs, decisions and behaviors.

Leaders set the tone and help link people to the mission.

- Leadership assessment and Coaching
- 4 Values modules to be facilitated, one per quarter
- Country manager/Office leaders play a role of CAST ambassadors
- Culture video
- Cast Values embedded in all People Practices and QHSE
- Systematic promotion of Cast Values

Focus areas to become the world class global player in satellite services



SpeedCast - Strategic 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 organic growth

- A strong track record of revenue and earnings growth
  - 30% FY2011-FY2014 pro forma EBITDA CAGR
- High operating leverage and benefits from increasing scale
  - Increase in EBITDA margins in FY2011 (11%) to FY2014 (17%)

3 Demonstrated track record of successful identification, execution and 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 (Satcomms & Oceanic)
  - Five strategic acquisitions in 2015 (Geolink Satellite Services, Hermes Datacomms, NewSat, SAIT and ST Teleport)

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 to execute the strategy

- Led by PJ Beylier, who has been with SpeedCast for 14 years, including 10 years as Chief Executive Officer

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Investor Day – Enterprise & Emerging Markets

January 28, 2016

Enterprise & Emerging Markets, Multiple sources of growth

Enterprise & Emerging Markets

- E&EM remains the largest of the three business units

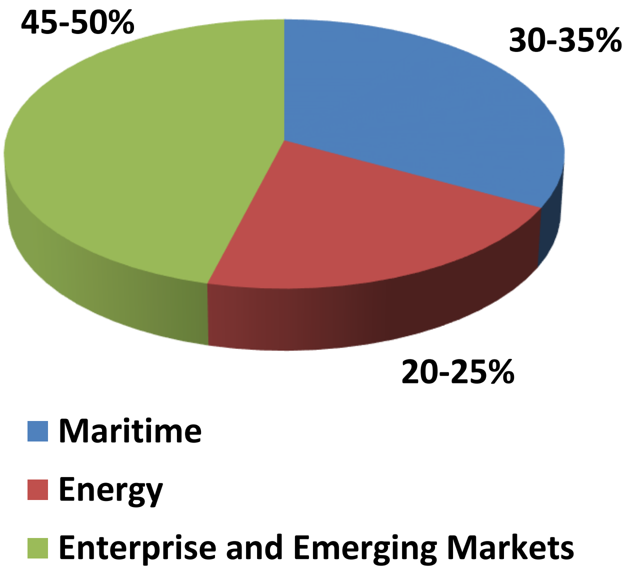
Trends Supporting Growth

- Overall demand for increased bandwidth
- New emerging geographic markets for SpeedCast

Major Growth Areas

- Cellular backhaul
- Satcoms outsourcing for telcos
- Government
- NGO
- Media
- Mining
- Emerging vertical segments: Aero & M2M

Indicative Service Revenue Breakdown



Global Trends for VSAT

- **Global satellite enterprise VSAT market** forecast to be a **$6+ billion** market in **2016.** (Includes equipment, managed services, as well as services revenues). SpeedCast's market share is less than 3%.
- **Global satellite enterprise VSAT market is growing considerably faster than** its major industry **competitors**-traditional telecom wireless and wireline networks
- **North American** and **European** markets **are mature** while **Asia-Pacific, Africa** and **South America are growing at a rapid rate**.
- Various vertical markets are seeing revenue growth; with **maritime,** and **cellular backhaul topping the list.**

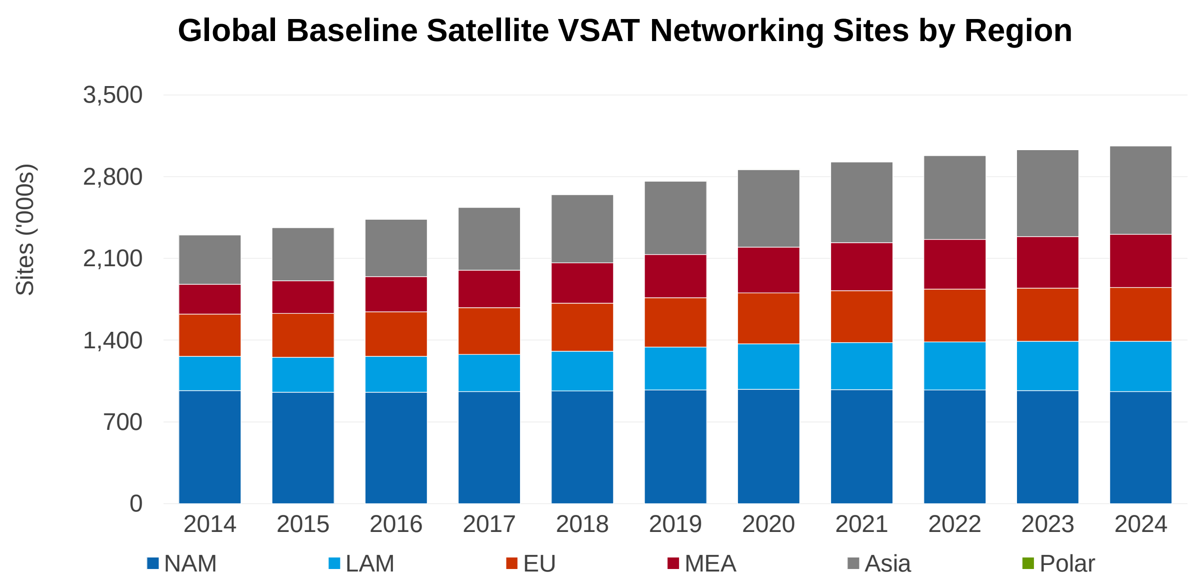
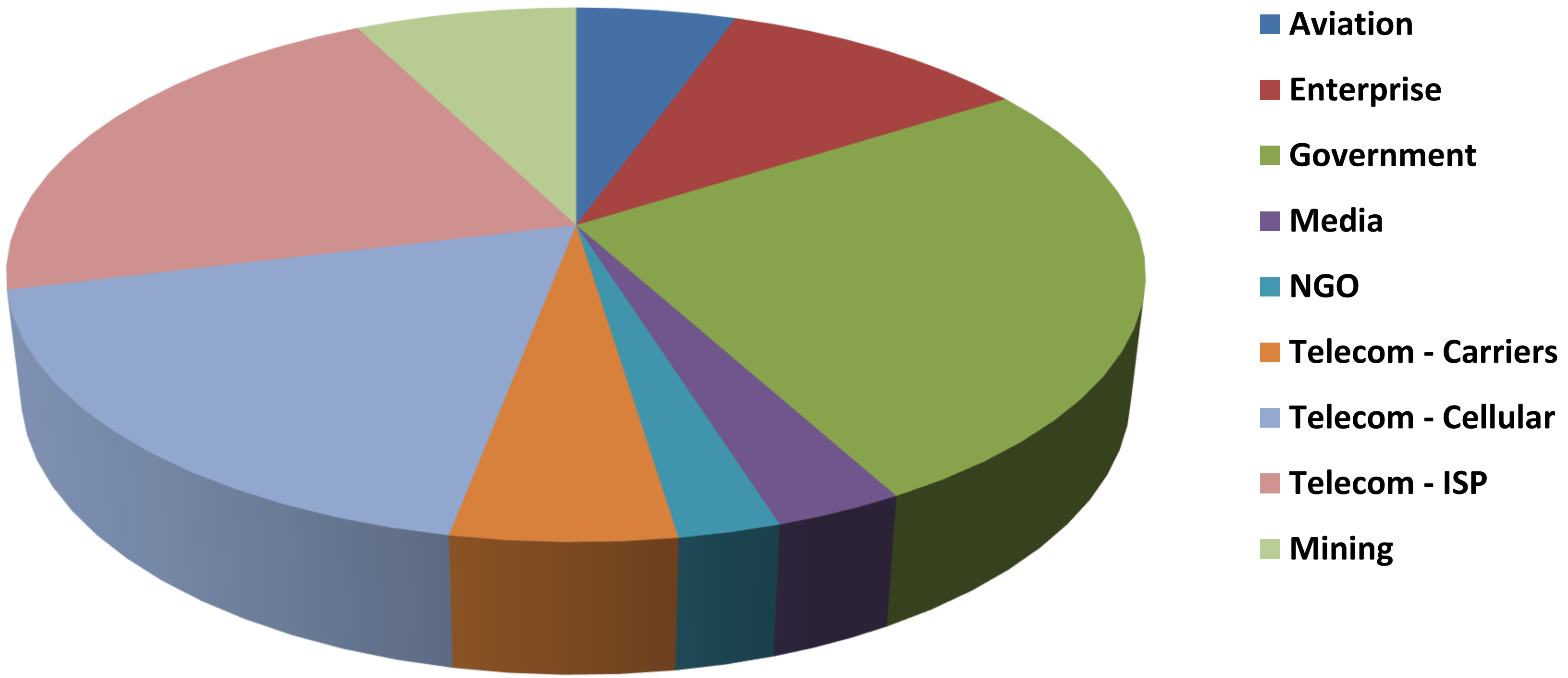


Exhibit 1.15 Global Baseline VSAT Networking Sites, 2014-2024

E&EM – a very diversified business

Estimated Service Revenue Breakdown per Vertical Market



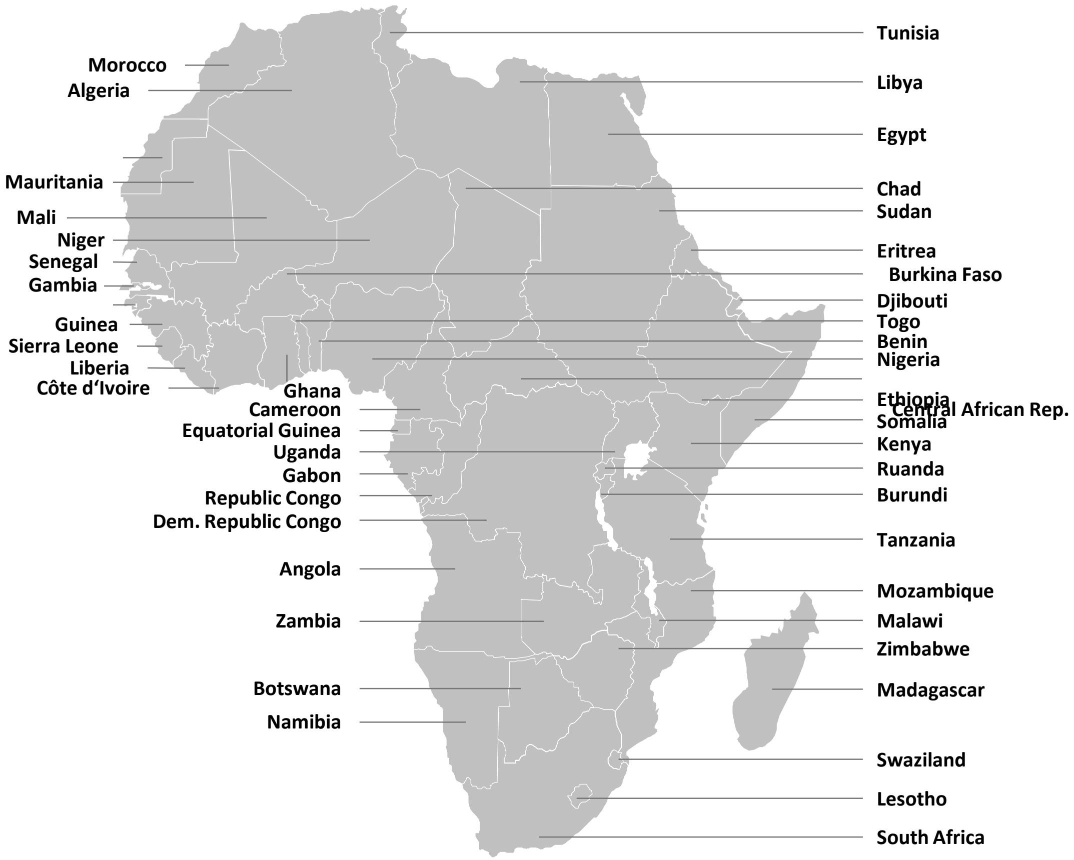
E & EM - Growth Strategy

- Focus on **key sub-verticals** that can bring strong growth in 2016
- Strong push into **emerging markets**
  - Expand LATAM business leveraging Newcom's relationships and capabilities
  - Continue to grow in key APAC new frontiers: Myanmar, PNG, Iran,…
  - Further build capabilities and distribution network in Africa
- Develop our **product offering**
- **Strengthen** sales team and sales productivity

Emerging Asian Growth Markets

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

Africa – an emerging continent



- **Geographic Expansion**
  - Acquisition of Geolink in March 2015 gave SpeedCast access to 26 of the 54 African Nations

Latin America – a new frontier

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Focus Markets

- Telcos
- Rural Infra-structure
- Oil & Gas / Mining
- Government
- Enterprise

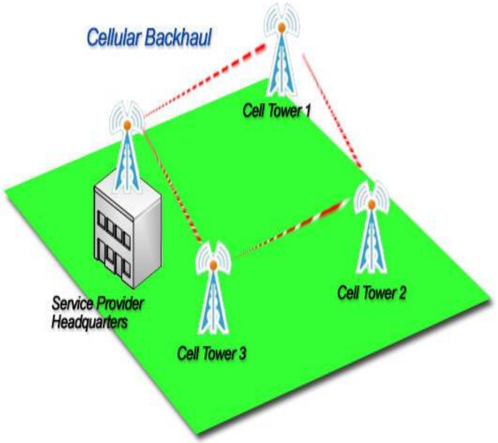
Telecom Government Budgets

- Peru USD22.4 MIllions
- Mexico USD108 Millions
- Colombia USD356 Millions
- Chile USD113 Millions

World Population Rank	Country	Internet Users Millions	Total Country Population Millions	Penetration (&Population w/Internet)
36	Peru	13	31	41%
11	Mexico	51	124	41%
22	Colombia	26	49	52%
40	Chile	12	18	66%

Key Vertical Market – Cellular Backhaul

- Established markets still looking to satellite to increase coverage to more remote areas, Japan, Malaysia, Australia...
- Government initiatives sponsoring extending coverage to remote areas, Malaysia, Australia, Myanmar...
- Emerging markets rapidly rolling out mobile networks, Myanmar, Pakistan, Bangladesh, ME nations
- A growing number of mobile operators looking at outsourcing the satellite part of their cellular network
- Total IP traffic has been multiplied by 70 since 2003 and is expected to triple in the next 5 years, video and internet of things being key drivers



Infrastructure is the main bottleneck to more growth

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Total world population **7.1bn**

Offline **4.4bn**

OF WHICH **95%** IN EMERGING COUNTRIES

- Lack of infrastructure
- Poverty
- Illiteracy

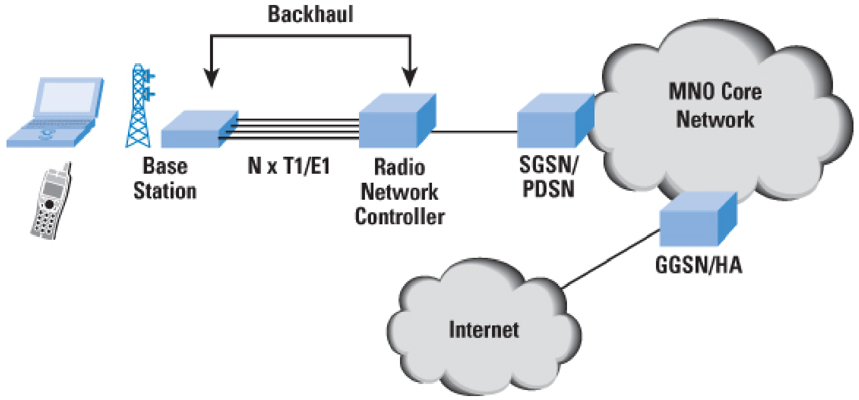
Connected **2.7bn**

OF WHICH **0.9BN** IN DEVELOPPED COUNTRIES

Mostly fixed connections

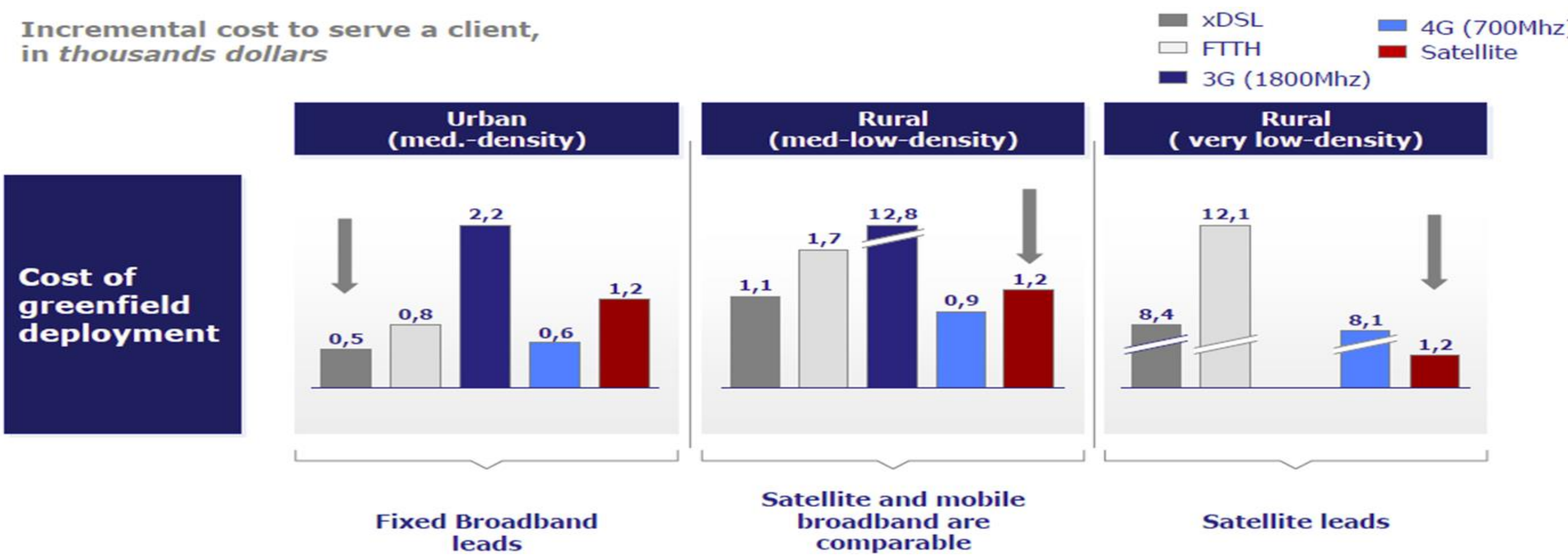
OF WHICH **1.8BN** IN EMERGING COUNTRIES

Mostly 2G mobile connections



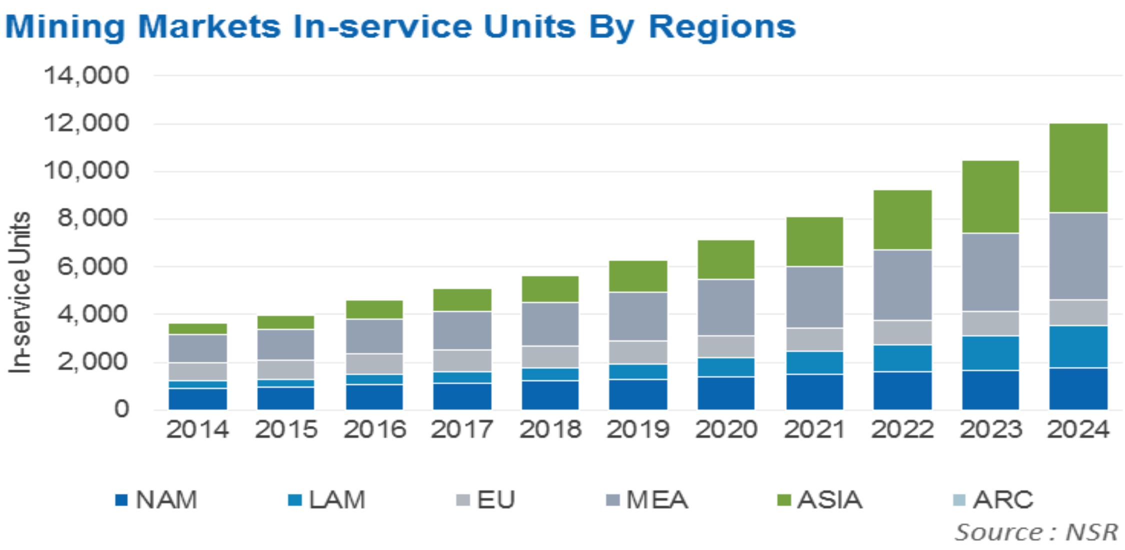
Cellular backhaul strategy – creating a unique value proposition

Speedcast becoming key partner / one-stop-shop for ALL rural needs of cellular operators



Key Vertical Market – Mining

- **Market Globally**
  - Thought to be circa $1 trillion
  - Top 40 companies revenue above $450 billion
  - Satcoms total market today globally around $700 million
  - Fastest growing regions are Asia and Latin America
  - More complex and technical requirements, including automation, are seeing increasing investment in communications



Mining Industry Needs for Satellite Comms

- **Remote locations where access to terrestrial networks is not availble**
  - Up to 50% of mines are not connected to Fibre networks

- **Cellular services also required**
- **Mining is gaining new legislations / licences**
  - QHSE updates and country imposed tender processes
- **Growing demand for connectivity**
  - Remote operations and control is increasing demand for bandwidth: emergence complex and often remote contolled and monitored mines
  - Growing demand for video surveillance and conferencing
  - Crew Welfare / Moral needs for internet access and voice calls at remote sites

Mining strategy

- Leverage existing relationships in Australia and migrate across continents
- Develop new relationships with global mining companies
- Offer value added services

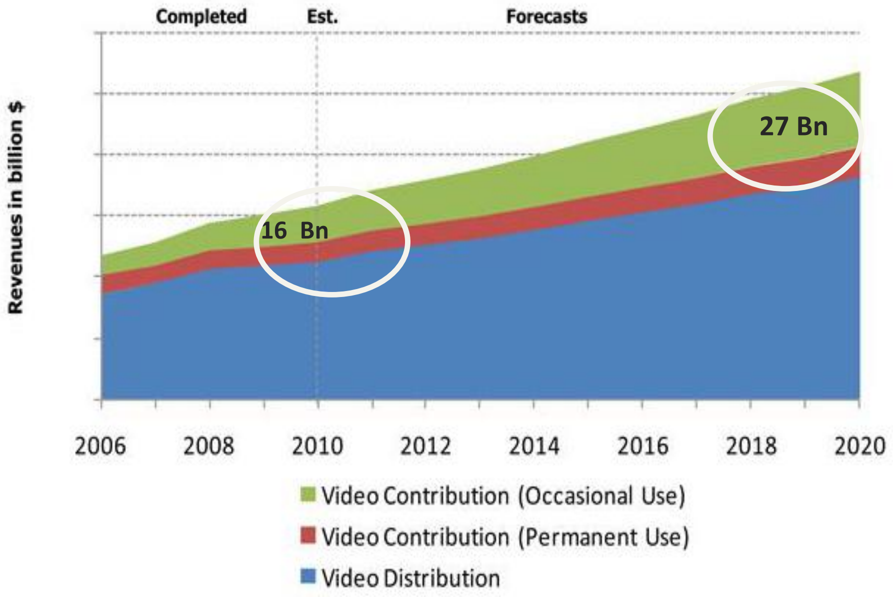
Key Markets – Satcoms Outsourcing for Telcos

- 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 through global telecoms operators
- Global telecoms operators usually have limited satellite capabilities, if any, and therefore need to outsource that part of the network to a global satellite service provider

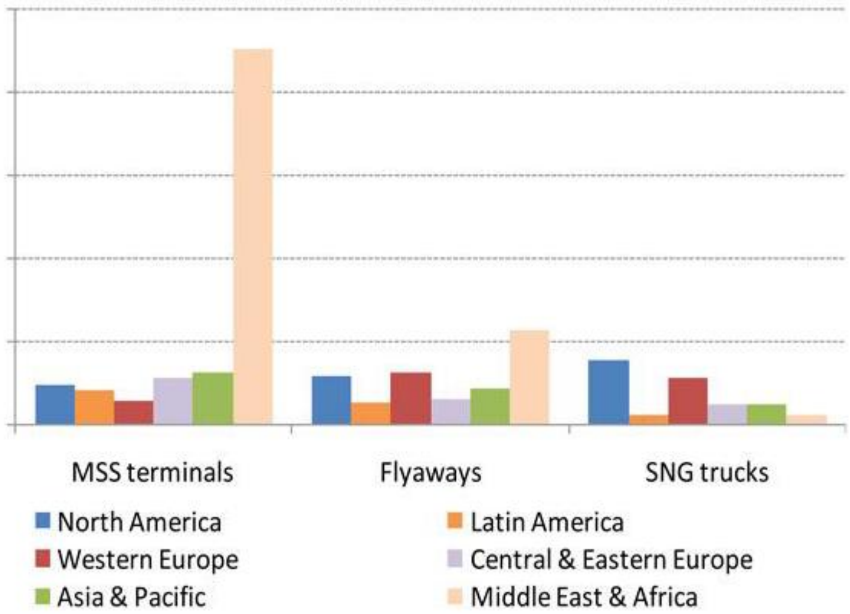
Key Markets – Government growth strategy

- **Differentiation by offering defence-grade enterprise services at a cost competitiveness**
- **Leverage government cleared infrastructure**
- **Explore X-band and UHF opportunities**
- **Further engagement with key contractors to the Australian government. Recent wins have legitimised SpeedCast's government and defence presence in Australia.**
- **Development of a distribution network**

Key vertical market - Media



Forecasts revenues for Video transmission services / segment (EuroConsult)



Number of terminals in the next 10 years (EuroConsult)

MAIN TREND

- **In the next 4 years video permanent and occasional uses will represent $27 billion**
- **By 2020 MSS terminals will represent 40 % of the occasional use market ($4.5 billion)**

Some SpeedCast customers

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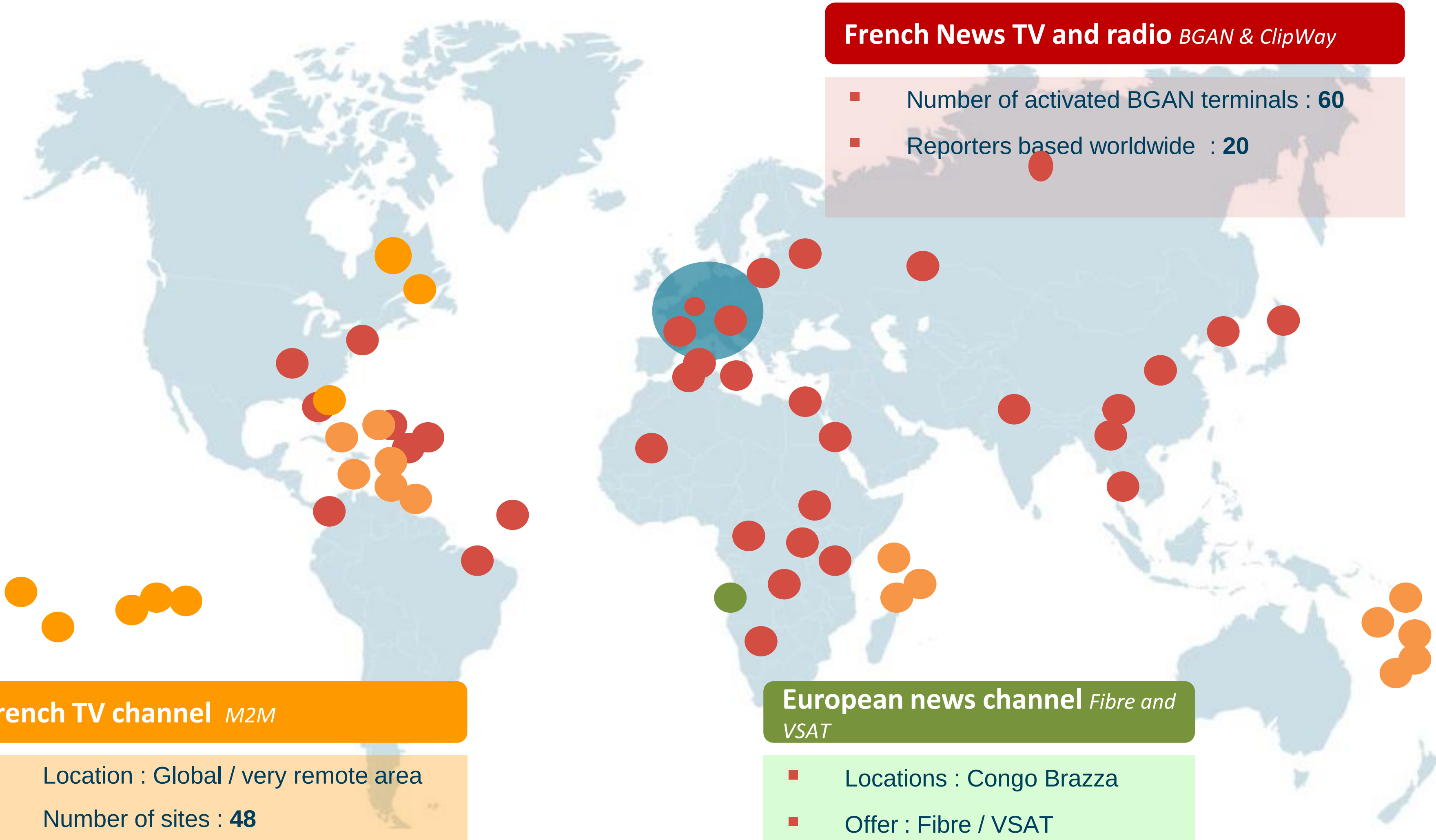


French News TV and radio *BGAN & ClipWay*

- Number of activated BGAN terminals : **60**
- Reporters based worldwide : **20**

French TV channel *M2M*

- Location : Global / very remote area
- Number of sites : **48**

European news channel *Fibre and VSAT*

- Locations : Congo Brazza
- Offer : Fibre / VSAT

SpeedCast differentiator: Clipway

SpeedCast

Your video and audio transmissions anytime, anywhere

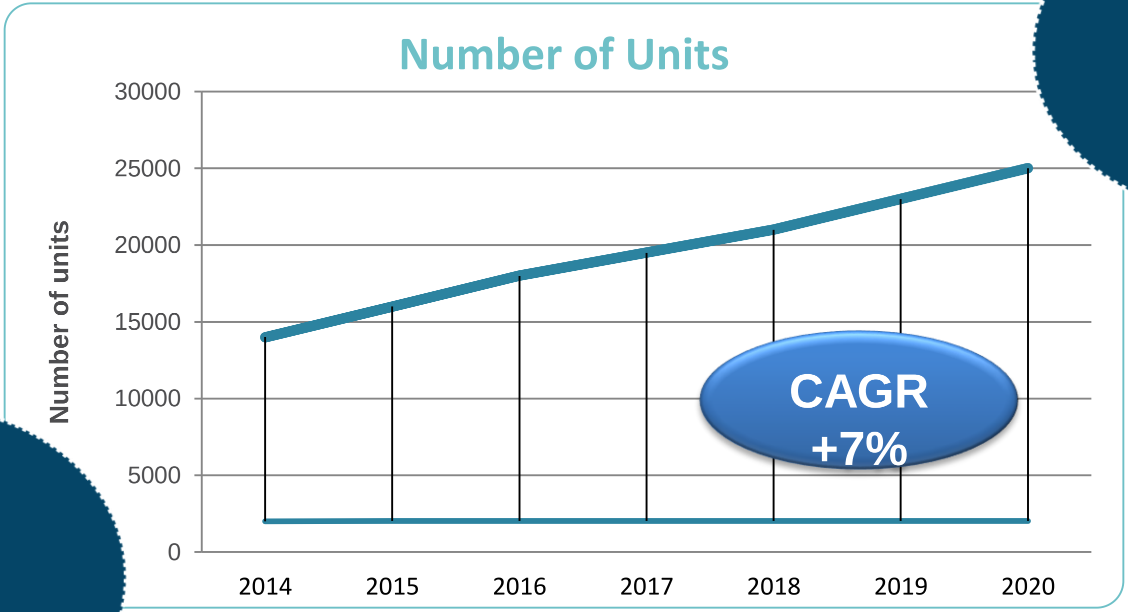
- All software solution (encoding & decoding side)
- Audio and Video Live and pre recorded transmissions
- Fully IP compliant (VSAT / MSS / 3 & 4 G)
- All integrated
- Intuitive, light and fast to deploy

Live transmission = press 1 button and be on air

Media growth strategy

- **Take Clipway global**
- **Build upon ST Teleport and Newcom broadcast experience to grow the business globally**
- **Leverage SpeedCast's global infrastructure and scan**

Key vertical market – NGO



2014

14,000
Vsat /MSS

2020

25,000
Vsat /MSS

Aid NGO market carving a niche by Jose del Rosario, 23rd May 2012

Leading NGOs

Order	Organizations	Income US$ Billion
1	World Vision International (US)	2,8
2	Save the Children (UK)	1,4
3	Médecins sans Frontières (CH)	1,2
4	Oxfam International (UK)	1,2
5	Catholic Relief Services (US)	0,8
6	Plan International (UK)	0,8
7	Care International (CH)	0,7
8	Aga Khan Development (CH)	0,4
9	Action Aid (Kenya)	0,3
10	Mercy Corps (US)	0,3

Some NGO customers

SpeedCast

NGO Growth strategy

- Offer a global service with unprecedented local support across the key regions of operations: Asia-Pacific, Africa, South and Central America
- NGO customers to benefit from economies of scale
- Leverage US-based resources to penetrate US-based NGOs

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Investor Day – Operations & Engineering

January 28, 2015

Operations and Engineering

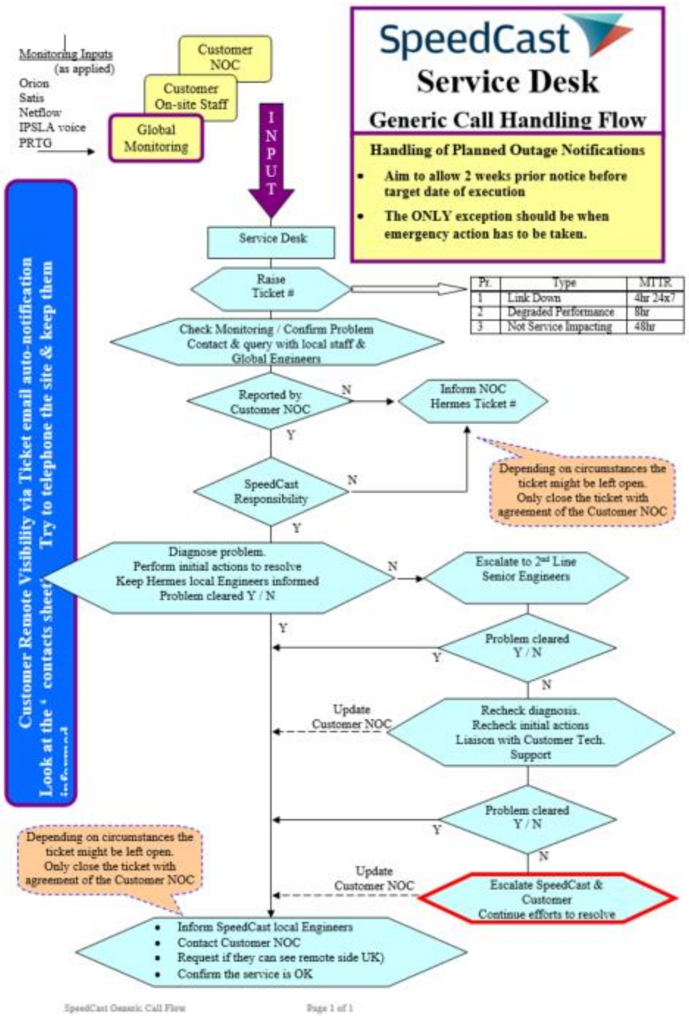
- **Over 150 staff in Operations**
- **Departments**
  - Global Service Desk: 24 x 7 Global support
  - Field Engineering: On-site engineering service
  - Network Operations: Managing terrestrial networks, teleport infrastructure and VSAT platforms
  - Service Implementation: Large scale project roll out and project management
  - Capacity Management and Network Planning: Procurement of satellite capacity, Optimization and Integration

Global Service Management

SpeedCast

- **Over 40 engineers**
- **24/7 Global Service Desk: UK (Shrewsbury), Hong Kong and Australia (Adelaide)**
- **Regional Service Desk: Paris, Turkmenistan and Greece**
- **Soon adding Singapore and Miami**
- **GVF and Cisco qualified engineers**
- **Information Technology Infrastructure Library (ITIL) based procedures**
- **Weekly and monthly reporting**
- **Mission Statement:**
  - Proactive, fast, effective support to end users
  - Performance checks
  - Network monitoring and management
  - Comprehensive reporting to end users
  - Proactive Continual Service Improvement (CSI)

Fault Management and Escalation

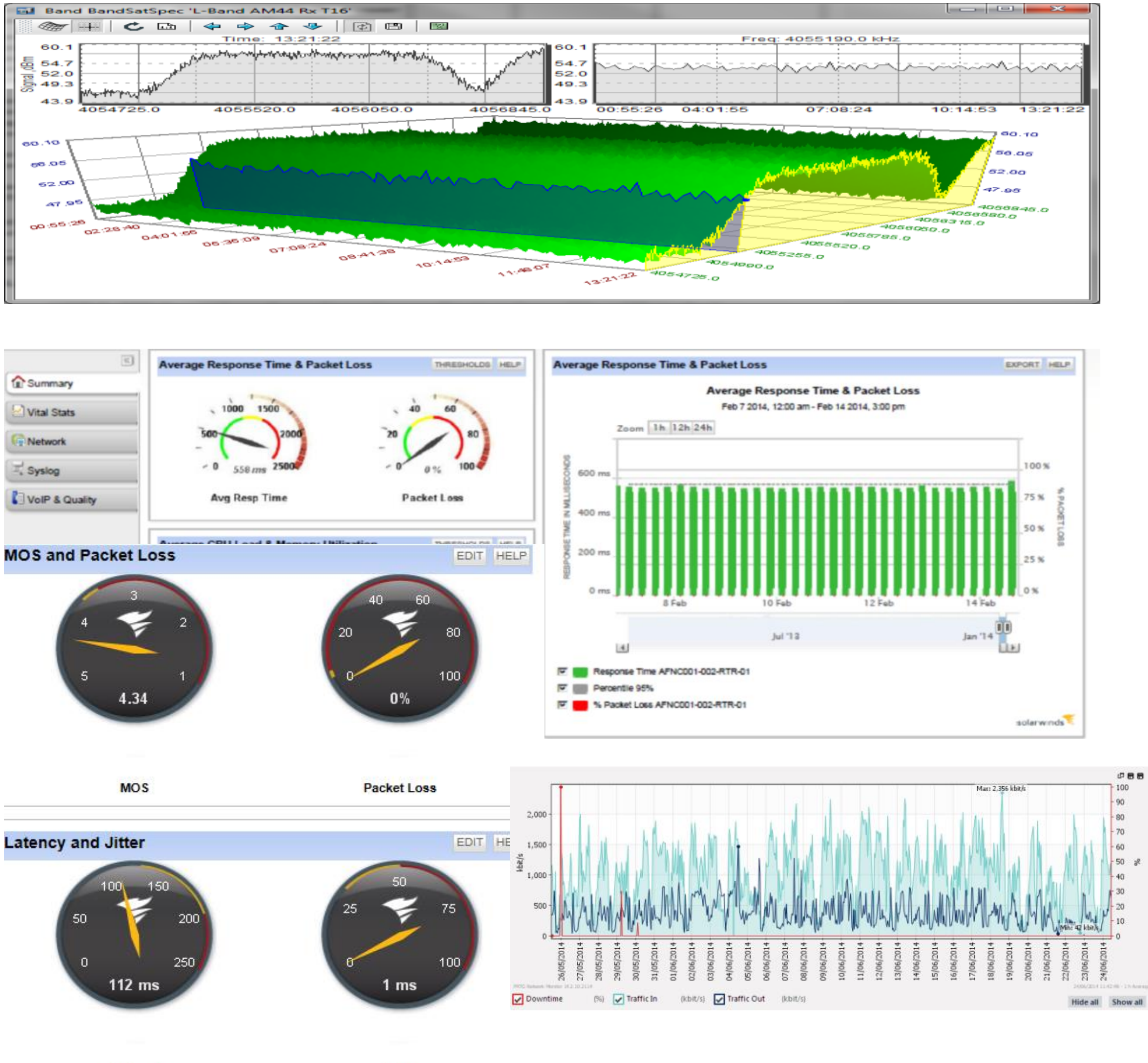


Priority	Trouble Type	MTTR
1	Link Down	4 hours, 24/7
2	Degraded Performance	8 hours
3	Non Service Impacting	24 hours

A	Shift engineer
B	Senior Engineer
C	Service Manager / Account Manager
D	Global Service Manager / Director

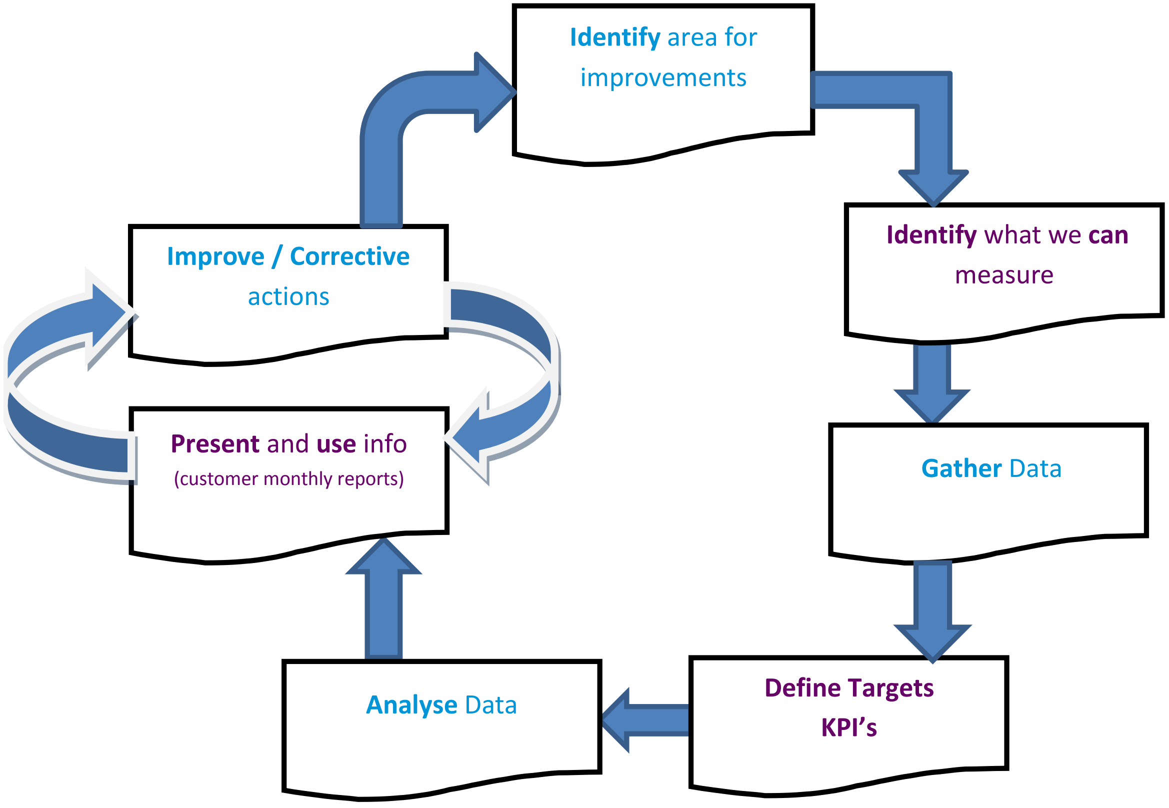
Priority	Notification Time Intervals (Next Path Notified within)			
	A	**B**	**C**	**D**
1	Immediate	Immediate	2 hours, 24 × 7	4 hours, 24 × 7
2	1 hour	2 hours	1 Business day	1 Business day
3	1 hour, Business days	1 Business day	Weekly	Weekly
4	1 day	Weekly	Weekly	Weekly

Monitoring Tools



- Real time
- Web-based
- SNMP based
- Detailed inspection of remote network
- Trend analysis and capacity management
- Data throughput, alarms, errors
- Detailed performance eg application QoS, MOS for voice
- Customer access
- Orion, PRTG and SATIS RF monitoring.

Continual Service Improvement (CSI)



Continual Service Improvement model

Monthly service reports which identifies trends, capacity issues, performance and KPI's

Service Delivery Managers identifies improvement opportunities and enhances **Service Level Agreements**

Field Engineering Team

SpeedCast

- **Global Presence**
- **Site Surveys, Installation and troubleshooting**
- **Accredited to work on offshore platforms**
- **Maritime antenna experience**
- **ESLA to guarantee on-site within 48 hours**

Field Engineering - Global Presence

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LEGEND

Partner Engineer

SpeedCast Engineer

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Field Engineering – Mission statement

- Maintain the SLA committment
- Quick implementation for new services
- Provide 24x7x365 support to our customers
- Every Engineer has gone through HSE induction.
- Every Engineer will obtain national safety certificates and global offshore certificates (Bosiet, medicals)
- Every Engineer has a current vaccination program, can be used everywhere, anytime, globally

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SpeedCast Global Network – a key barrier to entry

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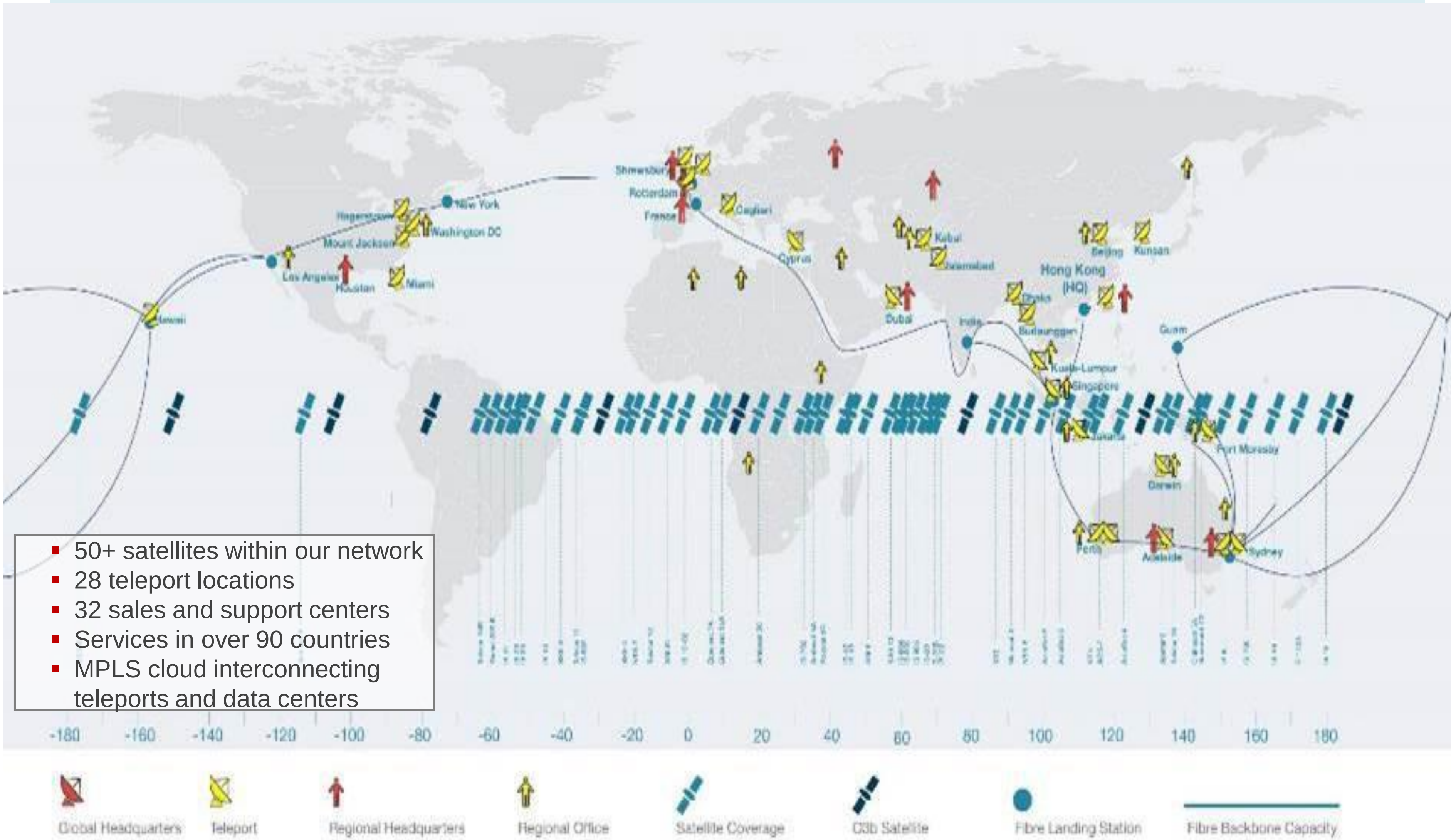
One of the largest buyers of satellite capacity in Asia Pacific. Bandwidth requirements are actively managed and drives significant operating efficiency.

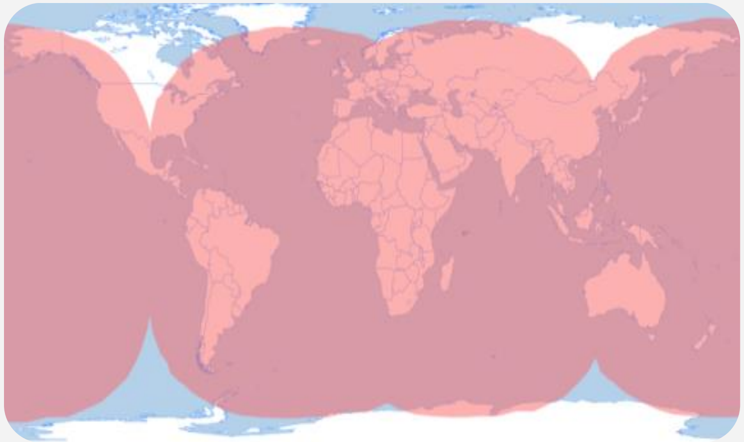


- 50+ satellites within our network
- 28 teleport locations
- 32 sales and support centers
- Services in over 90 countries
- MPLS cloud interconnecting teleports and data centers

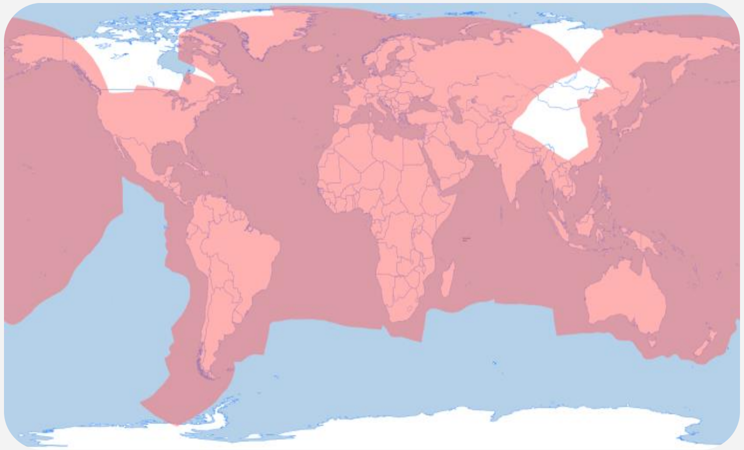
Global multi-band coverage

SpeedCast

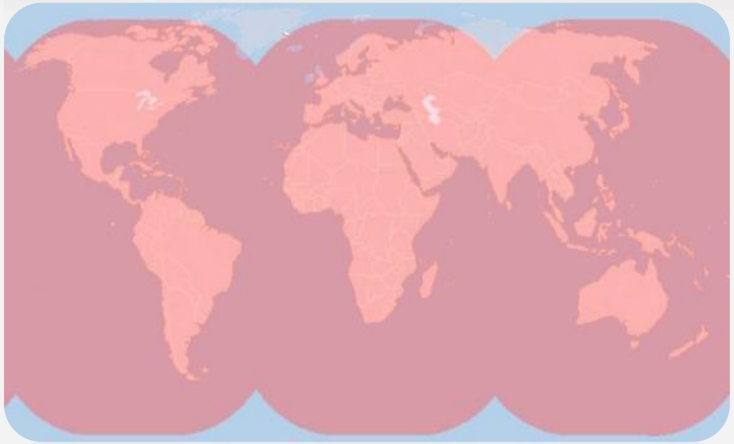
C-BAND



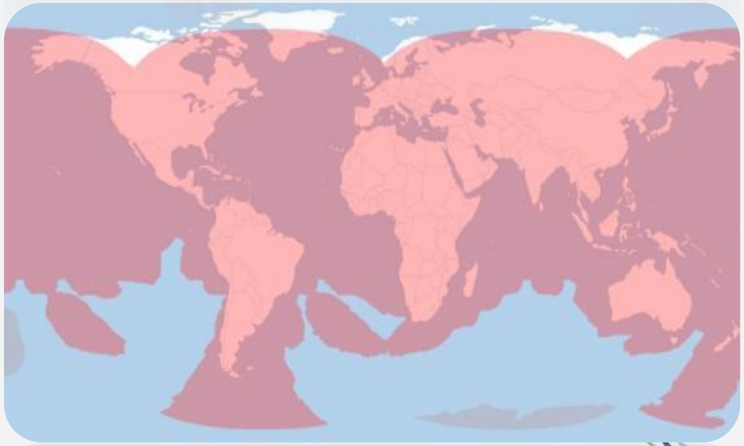
KU-BAND



L-BAND



KA-BAND



AsiaSat eutelsat INTELSAT SES Telesat inmarsat

SpeedCast
Wherever You Are

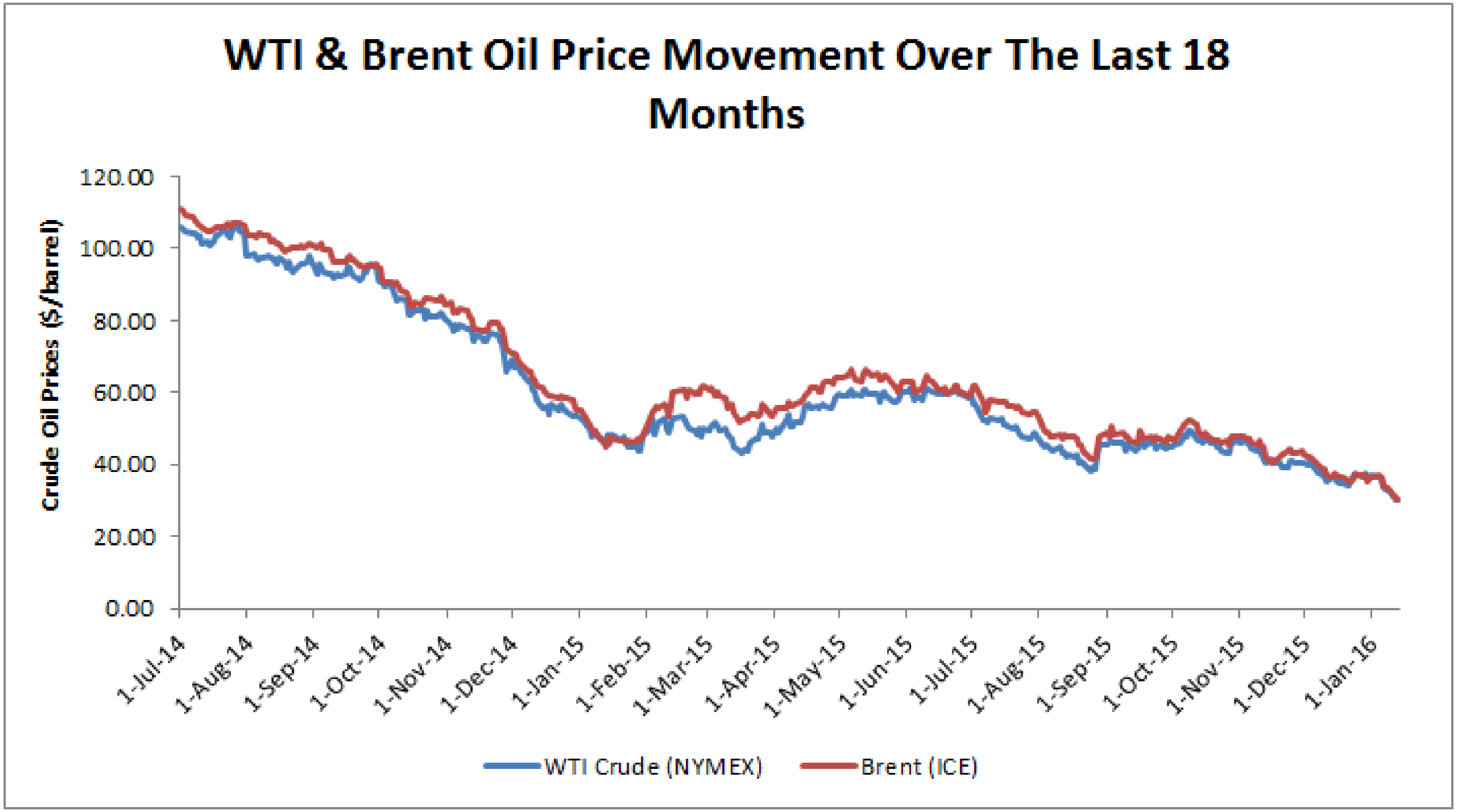
Investor Day - Energy

January 28, 2016

Energy Vision – summary of achievements

- **Local Entity, Presence, Recognition and Trust**
  - US Entity established and Houston office opened
  - Evangelism work with targeted customers
  - Recognition and trust earned to compete and win
- **Acquisition and Integration of Hermes**
  - Presence in key difficult Energy countries
  - Established Energy customers to leverage for growth
  - Energy Global Sales integration completed
  - Network integration completed
- **Hiring of Key Employees**
  - Sales, Sales Engineering and Program Management
- **Engagement with targeted key Energy customers**
- **Validation of the vision with global Energy service company win**
  - Initial award for Asia-Pacific and Africa
  - Implementation ongoing
  - Additional growth expected as we prove our capabilities
  - More tenders to follow

Crude oil price hits 13-year low



Source: Bloomberg

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OIL PRICE

Oil price: fall to $10 a barrel 'not impossible', admits BP boss

Bob Dudley reckons recovery will come later this year – and that price could rise above $50

Eric Piermont/AFP/Getty Images

Independent analysts predicting the oil price could fall to painful lows is one thing, but when an oil major admits an ultra-bearish forecast is likely, people sit up and take notice.

That is what happened on the fringes of the World Economic Forum in Davos yesterday, where the boss of BP, Bob

BP to slash 4,000 jobs as the oil price slump takes its toll

Redundancies come as analysts say crude could bottom out at just $10 a barrel

Russell Lynch | Wednesday 13 January 2016 | 1 comment

0 shares

The BP ETAP (Eastern Trough Area Project) oil platform in the North Sea, around 100 miles east of Aberdeen, Scotland *Getty Images*

BP has announced it is cutting 4,000 jobs – including 600 in its North Sea operations – in response to the latest dramatic slump in oil prices.

Oil sector 'has lost 65,000 jobs'

9 September 2015 | Scotland business

Reuters

The contraction of Britain's offshore oil sector has already stripped out 65,000 jobs, according to a new report.

The calculation of a 15% drop since the start of last year came from the annual economic impact report of trade body Oil and Gas UK.

It said the number of jobs supported by direct, supply chain and indirect employment had fallen from 440,000 to 375,000

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Losses can exceed deposits

Global Oil Job Cuts Top 250,000

by David Wethe

November 20, 2015 – 8:12 PM GMT Updated on November 21, 2015 – 5:00 AM GMT

- Texas lost about 240,000 industry jobs in late-1980s oil bust
- U.S. explorers extended 5-year low in oil drilling rig count

The number of jobs gutted from oil and gas companies around the world has now passed the 250,000 mark, with still more to come, according to industry consultant Graves & Co.

"I was surprised it's gotten this far," John Graves, whose Houston firm assists in oil and gas deals with audits and due diligence, said Friday in a phone interview.

The industry has idled more than 1,000 rigs and slashed more than $100 billion in spending this year to cope with oil prices that have fallen by more than half since 2014. Oil services, drilling and supply companies are bearing the brunt of the downturn, having accounted for 79 percent of the layoffs, according to Graves.

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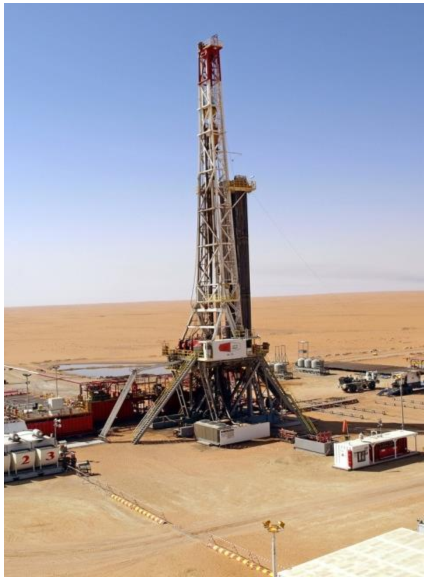
Rig count decline is slowing down

Area	Last Count	Count	Change from Prior Count	Date of Prior Count	Change from Last Year	Date of Last Year's Count
U.S.	15 January 2016	650	-14	8 January 2016	-1026	15 January 2015
Canada	15 January 2016	220	+61	8 January 2016	-213	15 January 2015
International	December 2015	1095	-14	November 2015	-218	December 2014

* Source: Baker Hughes Rig Count

Energy industry's need for satellite

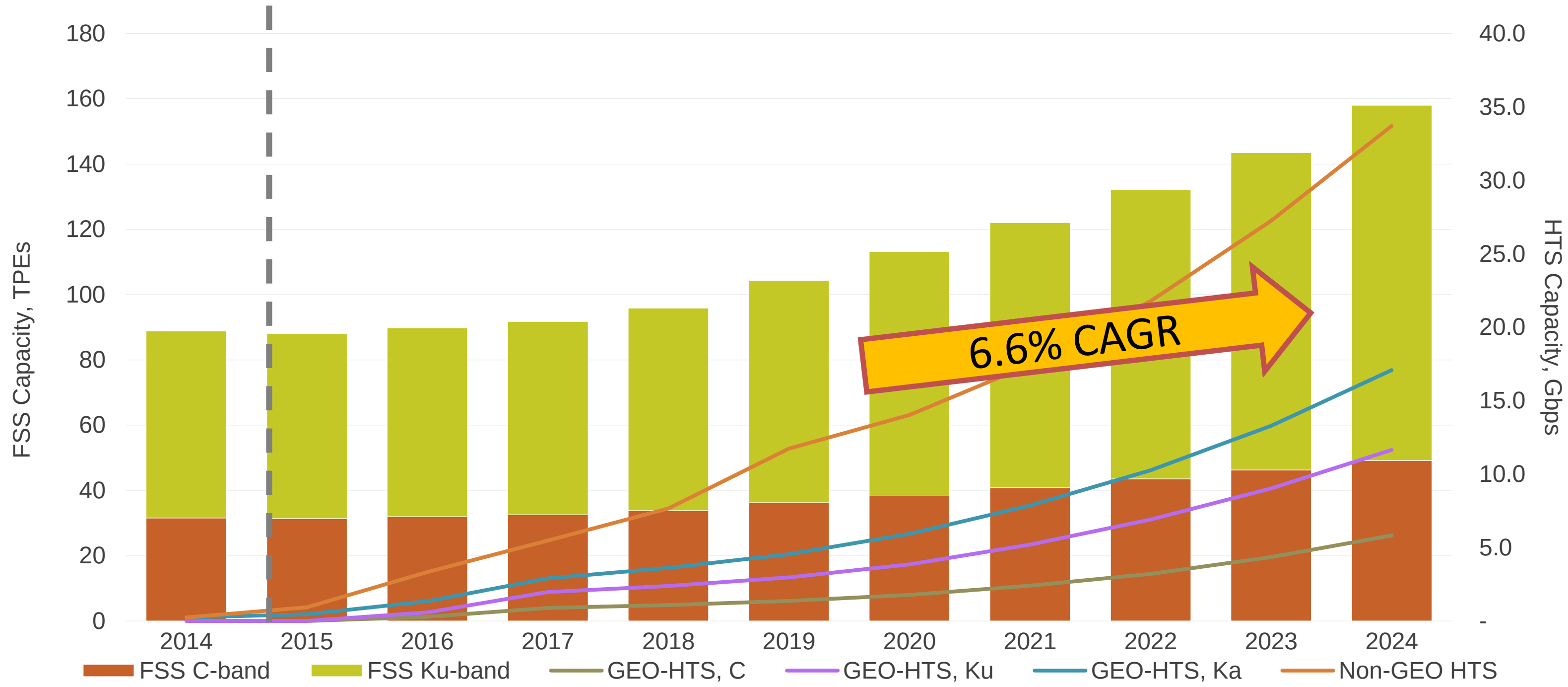
- **Remote locations where access to terrestrial networks is not availble**
  - Drilling and production assets are offshore or in remote land locations
- **Mobility requirements where assets are in transit**
  - Assets like Rigs and Service Vessels are constantly moving locations
- **Need for a standarized 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

Energy Markets – Growing Satellite Capacity Needs

SpeedCast



Source : NSR

Energy Markets, Capacity Demand By Bands

Growth Drivers for Satellite Communications

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

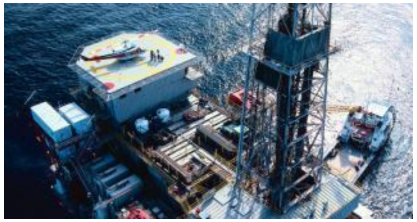
- The BP Macondo (Gulf of Mexico) incident has increased the amount of data required by federal law to be stored for each offshore site.
- Increased HSE legal requirements and new applications have been implemented to ensure greater safety and welfare of the workers, thereby requiring additional satellite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

Why Energy? – A powerful additional growth engine

- **Bandwidth needs are growing**
  - Bandwidth on existing sites is growing: emergence of the "digital oilfield"
  - Large projects in emerging markets where SpeedCast is strong
  - Energy is one of the largest customers of the satellite industry

- **Leveraging SpeedCast's global network and scale**
  - Leverage SpeedCast existing global satellite networks: bandwidth, teleports, terrestrial networks and personnel
  - Take advantage of economies of scale to offer cost effective solutions

- **Window of opportunity to gain market share from struggling competition**
  - Need for an alternative service provider following the merger of Caprock and Schlumberger GCS by Harris in 2010
  - Energy slow down creates a compelling event for customers to change provider - cost-cutting measures
  - SpeedCast has a very low market share in the oil & gas sector



We are becoming a major global player servicing the Energy sector

Competitive landscape

SpeedCast

Harris CapRock

- Global market leader, est. $350M in Energy Revenue
- Strong global presence and infrastructure
- Loss of a few key customers
- Strong in Energy, offshore Maritime, and Government
- Long-term energy contracts expected to expire over the next 12-18 months
- Perceived High employee turnover, in addition to several waves of layoffs

ITC Global

- Starting to be perceived as a global Energy player
- Recently acquired by Panasonic Aviation
- Strong presence in Africa, GOM, Australia
- Strong Sales Team with Energy and Mining Expertise
- Integration plan with Panasonic still unclear
- Potential distraction from the Panasonic acquisition, not a fit for Energy customers

RigNet

- Global Energy player, second to Harris CapRock
- Totally focused on Energy, onshore and offshore
- Recent departure of CEO, search is underway
- Recent replacement of CFO, transition occurring
- Strong global presence, a few recent wins
- Several restructuring plans done in 2015

Emerging Markets Corp. (EMC) / MTN

- Strong position in Africa, South America
- PE owned (ABRY)
- Strengths in Telecom, Maritime, NGO, and land-based Enterprise customers
- Key win from a Global Seismic Division/Company in offshore Maritime
- Seems to have lost some credibility in Energy; more likely to focus on maritime now following the MTN acquisition

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
- **Existing global and multi-band satellite and terrestrial network: CUstomer**
  - Some competitors are still building it
- **Leadership position in the Asia-Pacific region**
  - Growing region for the Oil&Gas industry

Energy strategy

- **Focus our efforts on key market share wins where the competition is weakened**
- **Drive revenue growth with the new integrated sales team**
- **Target a few key global customers, leveraging existing relationships**
- **Leverage the geographic opportunities created through the acquisitions: CIS, Iraq, Africa, Malaysia, Mexico, Colombia,…**
- **Leveraging 2015 strategic win to gain more share of their global spend**

SpeedCast

Wherever You Are

Investor Day - Maritime

January 28, 2015

Maritime satellite communications 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

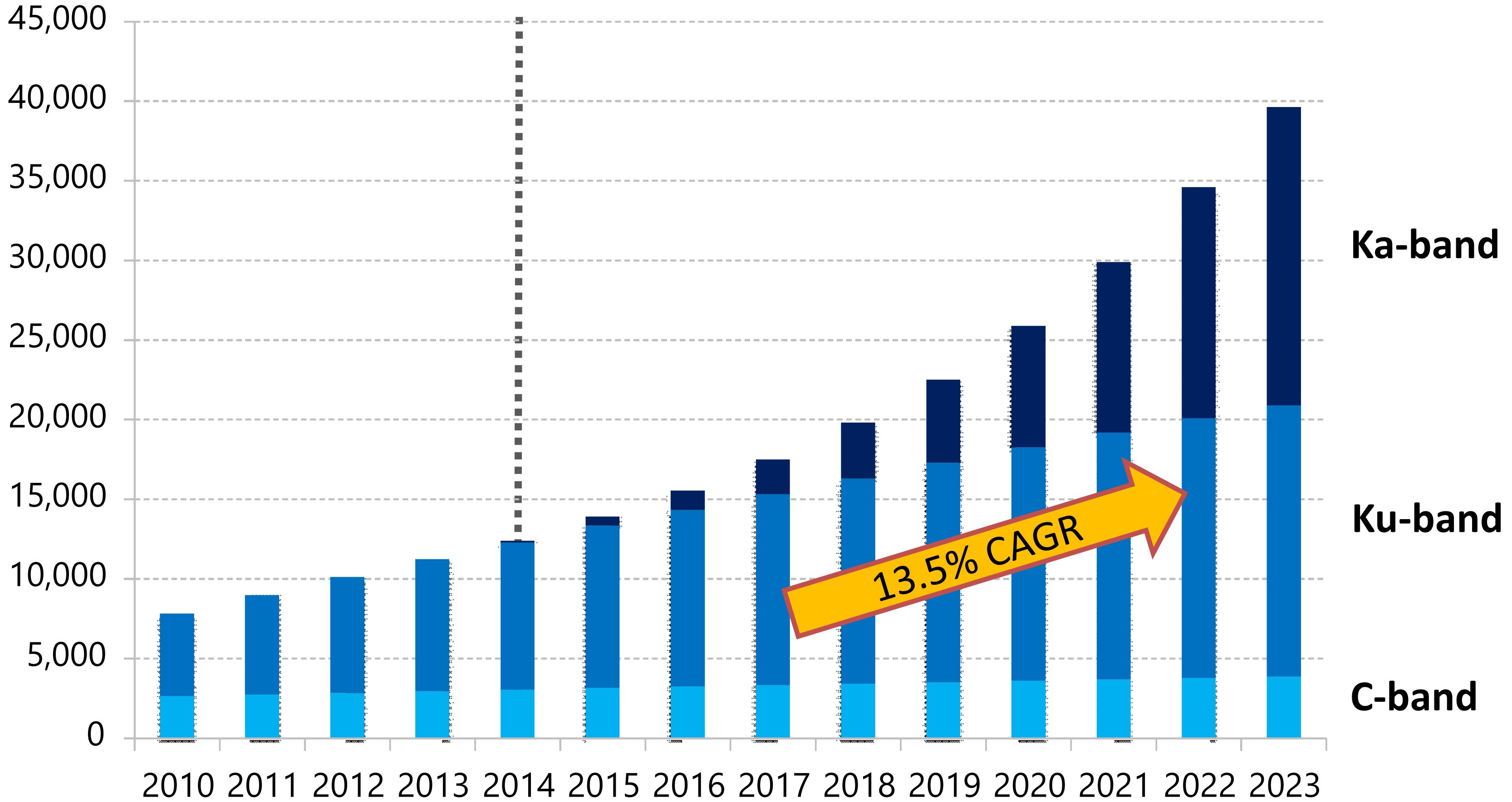
11,000
VSAT terminals

337,000
MSS terminals

$760 million
revenues for satellite operators

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

Number of terminals



Mobile Satellite Communications © Euroconsult 2014

SpeedCast Maritime Market Segments

Merchant Shipping

Fishing

Oil & Gas Platforms & OSVs

Ferries

Research & Survey Vessels

Cruise

Navies

Yachts

Maritime Growth Drivers

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 more financially feasible than MSS cost per usage model commonly used currently

Operational requirements

- On-board IT systems becoming more complex
- Remote controlling of ship functions via satellite, a source of cost savings
- Older communication technologies cannot support applications such as weather forecasting and video surveillance

Regulatory requirements

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

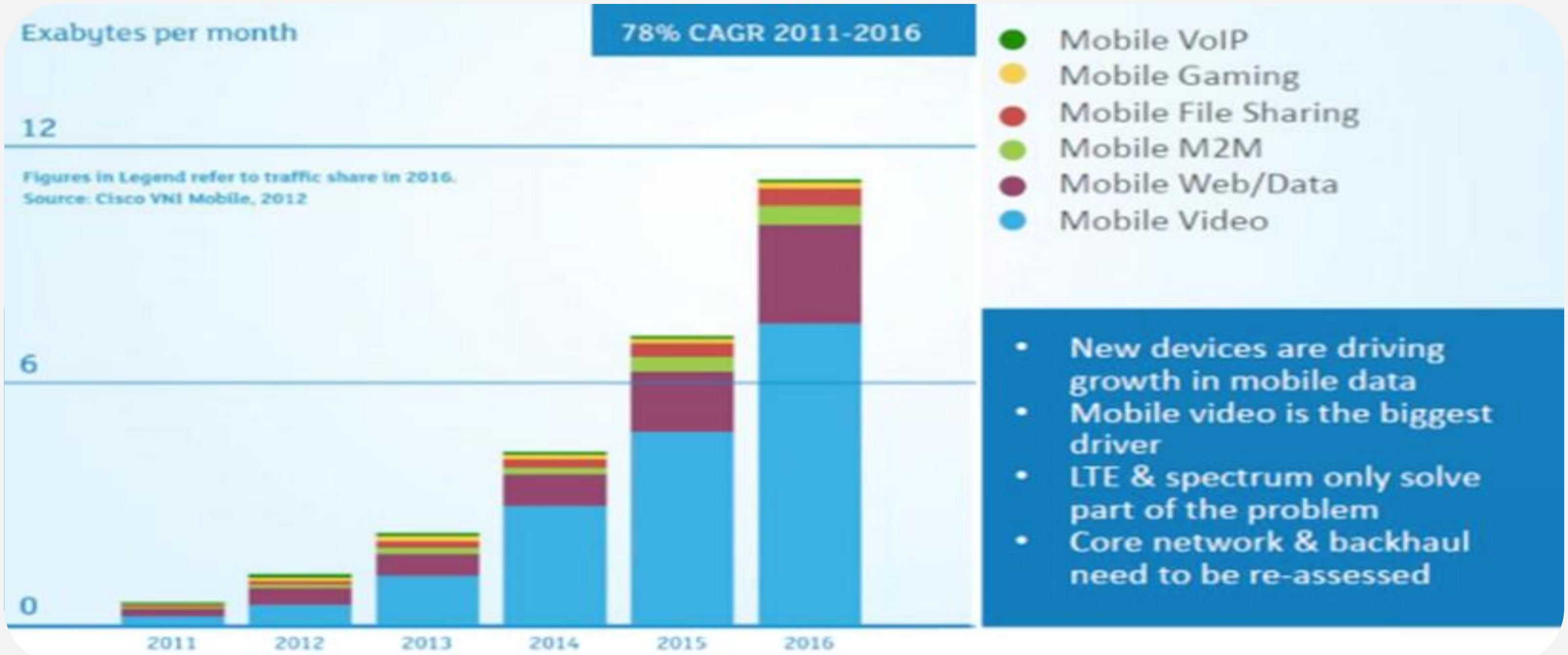
High speed data trends

Nokia 6310 the height of fashion in 2001

In 2007 apple released the iPhone 1G

As of 7/10/2014 there were officially more mobile devices than people in the world (7.2Bn), and they are multiplying 5 times faster than we are

High speed data trends



One Exabyte = One Billion Gigabytes
Five Exabyte = Total Words Ever Spoken By Mankind

High speed requirements in maritime

Centralized Security
Firewall

Telemedicine
Healthcare

Chart Updates
Navigation

File Distribution

Storage

Cloud Browsing
Browsing

Crew Welfare

- E Mail
- Social Media
- Crew Browsing
- Entertainment
- VoIP Calling

Engine Management

Maintenance

Maritime Strategy

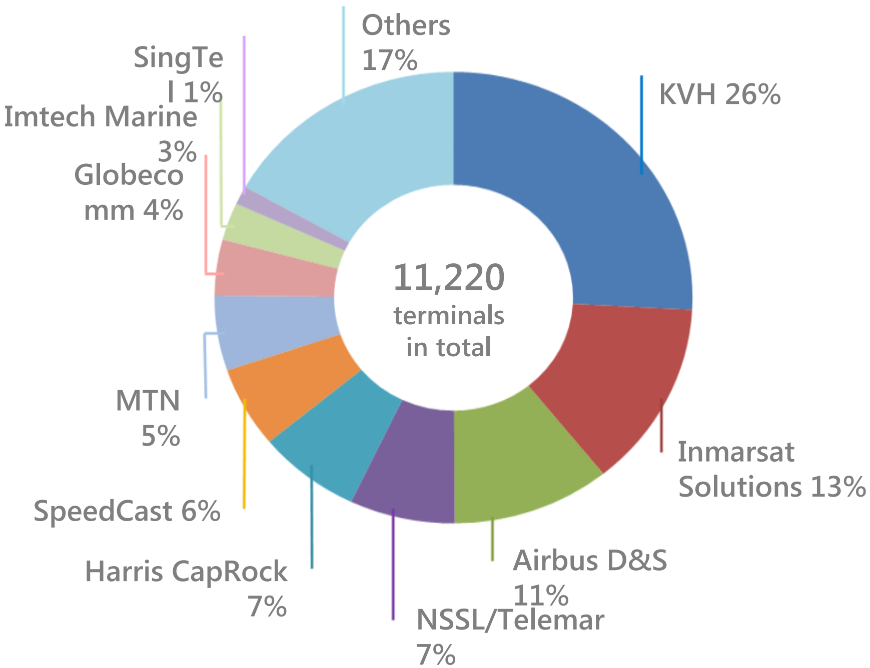
SpeedCast

- Focus on a few maritime segments: offshore, merchant shipping, yachting
- Increase sales team to drive VSAT adoption both through direct and indirect sales
- Take MSS to the next level through new distribution channels
- Set up additional distribution channels in markets where we are under-represented
- Promote a “Total Solution” MSS/VSAT/VAS/Terestrial Interconnect capability
- Pursue additional M&A opportunities

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 1600 vessels on its VSAT network
- Biggest Inmarsat customer for L-band services
- Direct and indirect sales strategy
- Recently acquired by private equity (Apax)

Inmarsat

- Launching a global Ka-band satellite network
- An estimated 2000 vessels on Ku-band
- Core business as 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
- Best global network in the industry (coverage + redundancy)
- Strong IT capabilities
- High customer satisfaction
- Worldwide presence
- Recognized service quality and customer support

SpeedCast
Wherever You Are

Conclusion + Q&A

January 28, 2016

SpeedCast Well Positioned for Sustained Revenue and Profitability Growth

SpeedCast

- **Strong growth potential across SpeedCast's diverse customer base**
- **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**

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**

THANK YOU