



PwC CEO Conference

Eva Berneke | 2025, March 20th

EUTELSAT GROUP | A leader of the LEO-GEO SpaceCom



SPACE PIONEER

46 YEARS of experience
Hundred of satisfied customers



CONSTELLATION PIONEER

1st PRIORITY KU BAND
Only player with Starlink in LEO until at least 2027

36

GEOSTATIONARY SATELLITES
offering connectivity and video services globally

>600

LOW EARTH ORBIT SATELLITES
offering global coverage (end 2025) through 42 dedicated gateways



1 700
employees



1 billion
Television viewers



1.21B €
Revenues for FY 23-24



50
countries

eUTELSAT GROUP | Demand for connectivity is booming

Mobility

Stay connected on the move



Aviation



Maritime



Land

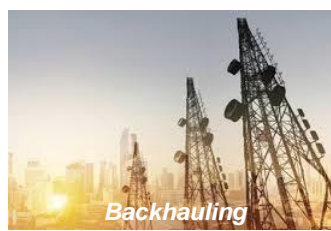
+14%
CAGR
23-32

Enterprise

Connect all sites and improve resilience



Cloud – Edge
Computing



Backhauling



Offshore platform

+9%
CAGR
23-32

Government

Prepare for modern warfare and secure critical communications



Surveillance



Catastrophy



Military ops

+16%
CAGR
23-32

eUTELSAT GROUP | Satcom is undergoing rapid transformations

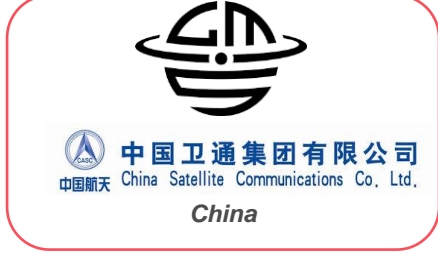
Access to Space
Radical reduction of costs



Value chain
Verticalization and consolidation



Technologies
NGSO Constellations



EUTELSAT GROUP | SatCom is critical in current geopolitical context

Eutelsat-OneWeb assets and capabilities are playing a critical role in EU support toward Ukraine



Eutelsat-OneWeb is a key contributor to multi-orbit multi-band European constellation IRIS²



Eutelsat Group is contributing to and benefiting from EU sovereignty

eUTELSAT GROUP | Innovation is fostering competitiveness

Sustainable Innovation

Direct-to-Device

Nextgen processors

AI Laser links

5G Small terminals

Sustainable use of Space



Cooperation with the ecosystem

Standards

Public Private Partnerships

Hosted payloads

European Space Agencies

NewSpace Startups

Vertical partnerships

International Alliances

EUTELSAT GROUP | Zoom on key innovation projects with partners



MEDIATEK

World's first 5G non-terrestrial network connection, leveraging OneWeb LEO satellites



Astroscale

Design and test of de-orbit missions with OneWeb satellites, ensuring Eutelsat Group's clean Space commitments



Greener wave.

Co-development of efficient and low-cost LEO+GEO terminals using innovative European antenna technology



SATE 
AIKO

Improvement of satellite lifetime and quality of service thanks to AI analysis of satellite data

eUTELSAT GROUP | Time to shine

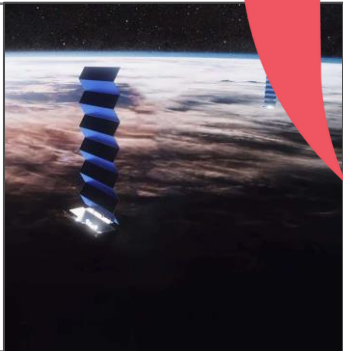
Connecting the world with high-speed, low-latency satellite



Rapid **growth** in connectivity across all sectors notably Government



New players reshaping the space industry in a chaotic world



Fostering **Innovation** to secure competitiveness and sovereignty



Eutelsat Group is a key asset for Europe