

SPACE THE ENABLER

Digital transformation of the maritime industry

Reasons not to transform and the prize if we do

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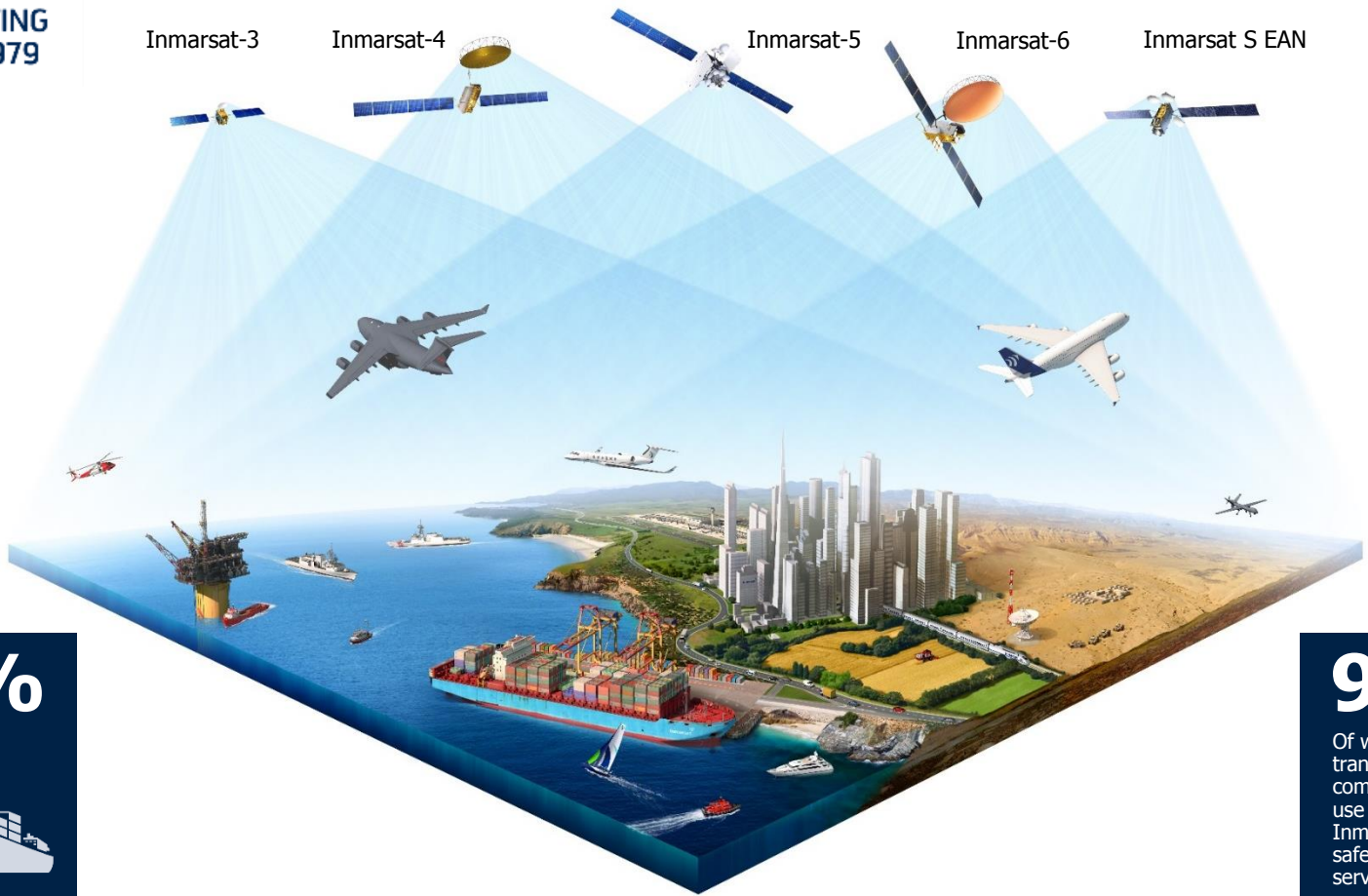
Inmarsat-3

Inmarsat-4

Inmarsat-5

Inmarsat-6

Inmarsat S EAN



85%

Market share in maritime mobile satellite services



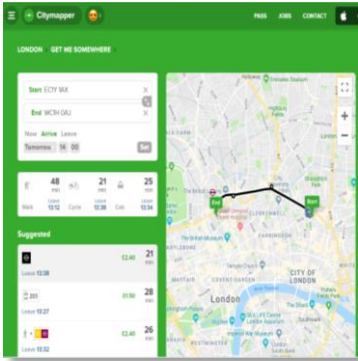
90%

Of wide-bodied trans-oceanic commercial aircraft use Inmarsat safety services



Digital transformation in the terrestrial world

Four good things



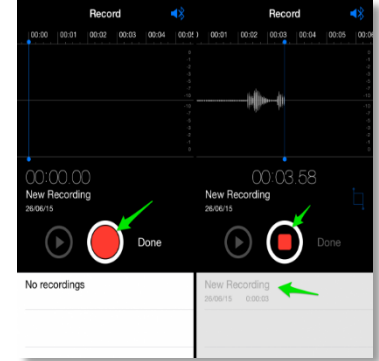
Ability to operate and plan 'in the moment'



Redistribution of value and use of unused resources



Real time situational awareness where insights prompt action



Communication and media sharing enabling new ways of working

Slower digital transformation of Inmarsat's industries

Four bad things



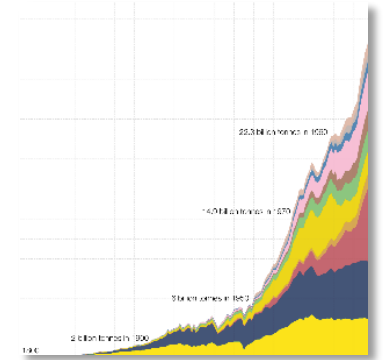
Malaysian airlines
MH370
239 fatalities
\$60M+ search cost



Port congestion
\$?Bns loss globally
- Logistics \$
- Goods waste \$



Brumadinho dam
collapse
237 fatalities
\$71.3Bn share loss
Lasting environmental
impact



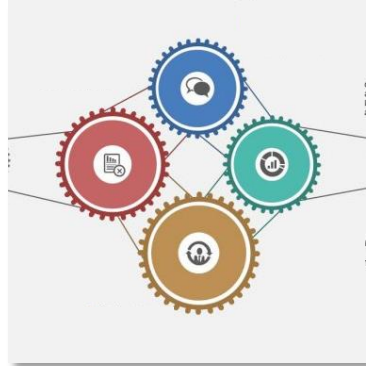
Fuel efficiency and
emissions
4%+ global cO2 emissions
maritime and aviation

There are good reasons for this pace of change

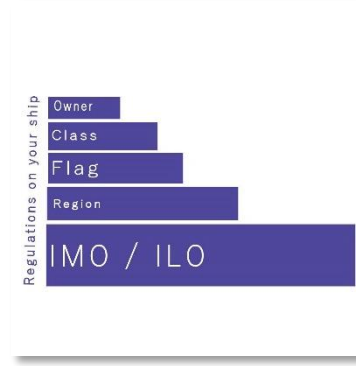
4 barriers to digital transformation in the **taxi** industry



Satellite comms seen as an unwanted cost in a margin pressured business



Established un-incentivised value chain



Lack of desire for industry transparency

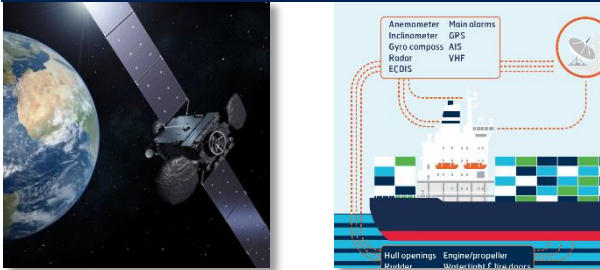


Lack of standard technology platforms

The industry needs to do more

5 things that Inmarsat is doing to enable digital transformation in the maritime industry

MAKE BANDWIDTH UNIMPORTANT



Significantly increased satellite data capacity where it is needed

Find new ways of charging for satellite communications based on value not MB

ENABLE OTHERS TO ACCESS MARITIME MARKET



Enable an applications ecosystem through standardised technology access

Provide secure permission based access to accurate vessel related data

Enable networks and systems to support instant access and flexible provisioning

Digital transformation in the maritime world

Four good things



Ability to operate and plan 'in the moment'



Redistribution of value and use of unused resources



Real time situational awareness where insights prompt action



Communication and media sharing enabling new ways of working

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