Introduction to Satellite Business Network

July 3, 2015
Shigeki Kuzuoka
Agenda

• Who am I?
• Space business in the world
• Business planning support
Who am I?

http://sat-biznet.com

**Current titles**

<table>
<thead>
<tr>
<th>Satellite Business Network</th>
<th>Founder and president</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euroconsult</td>
<td>Head, Euroconsult Japan office</td>
</tr>
<tr>
<td>Business Development</td>
<td></td>
</tr>
<tr>
<td>BizEarth</td>
<td>A board member, and Chair person, Foreign Business Information Working Group</td>
</tr>
</tbody>
</table>
**Who am I?**

**Experiences at Space industry**

<table>
<thead>
<tr>
<th>Satellite Business Network</th>
<th>2013-</th>
<th>Consultant for space business</th>
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</thead>
<tbody>
<tr>
<td>NEC</td>
<td>2009-2013</td>
<td>Marketing of Total solution systems (EO, SatCom, Ground network, and IT systems) for emerging countries</td>
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<tr>
<td>ImageOne</td>
<td>1996-2009</td>
<td>Data distribution (Radarsat, SPOT, OrbiImage) Value added service (InSAR, Hyper) Systems engineering of EO ground systems</td>
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<tr>
<td>Mitsubishi Electric</td>
<td>1979-1996</td>
<td>EO ground stations development</td>
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Who am I?

Services

- Consulting & Advisory
- Training
- Consulting
- Research
- SUMMIT
- Land subsidence monitoring
Space business in the world

OVERVIEW OF THE SATELLITE VALUE CHAIN

IN SPACE
- 30 companies: $2.8B, 5Y CAGR: -7%, EBITDA: <10%
- 10 companies: $1.7B, 5Y CAGR: -3%, EBITDA: <10%
- 50 companies: $14.5B, 5Y CAGR: 5.5%, EBITDA: 50-80%

ON EARTH
- 5,000 companies: $185B, 5Y CAGR: 13%, EBITDA 5-30%

KEY FIGURES
- SATNAV: 32%
- SATCOM: 66%
- EO: 2%
- 12% cumulated turnover
- 9% in space
- 91% on earth

KEY TRENDS
- Consolidation
- Convergence
- Innovations
- New players
- Integration
- Price pressure
- Partnerships
- Competition
- New markets
- Maturity

* Not eliminating double-counting of revenues within the industry's supply chain.
Space business in the world

THE 3 COMMERCIAL SATELLITE VALUE CHAINS IN 2013

* Market value at launch date for satellite manufacturing and launch services

Billion US$
Business planning support

The first step to your business plan

Find your value chain

End User

Reseller

Value Added Resellers

Distributor

Platform provider