



GILAT SATELLITE NETWORKS



A WORLD LEADER IN SATELLITE COMMUNICATIONS



**INNOVATIVE
GROUND
EQUIPMENT
TECHNOLOGY**



FIXED NETWORKS



2G 3G 4G 5G

Cellular Backhaul



Telecom services



Enterprise



Consumer



MOBILITY SOLUTIONS



Aero / IFC



Maritime



Land



Defense



NGSO

+800 Employees **1987** Founded **20** Sales Offices **5** R&D Centers **3** NOC Centers **GILT** NASDAQ /TASE

LEADING GLOBAL CUSTOMER BASE



SATELLITE OPERATOR



100+
COUNTRIES

300+
CUSTOMERS

900+
NETWORKS

SYSTEM INTEGRATORS





UNIQUELY POSITIONED TO UNLOCK GROWTH OPPORTUNITIES



- 1** | **Post COVID-19 IFC Rebound, Free WIFI Tailwind**
Long term IFC investment cycle
- 2** | **4G/5G Ubiquitous Connectivity Bridging the Digital Divide**
5G Total Addressable Market expanding dramatically
- 3** | **NGSO Constellations - Abundance of Capacity**
Large capital spending in satellite industry
- 4** | **Strong Tailwinds in Defense**
Increased focus on military SATCOM networks
- 5** | **Peru Terrestrial Networks "Investment" Shifting to Harvest**
Recurring revenue model

POST COVID-19 IFC REBOUND INCLUDES FREE WIFI TAILWIND



LONG TERM IFC INVESTMENT CYCLE



ENABLING LARGE IFC GLOBAL NETWORK

GLOBAL COVERAGE | > 30 SATELLITES |

18 TELEPORTS | 20 AIRLINES |

GLOBAL NETWORK MANAGEMENT SYSTEM



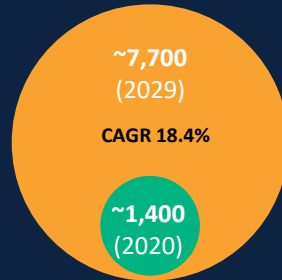
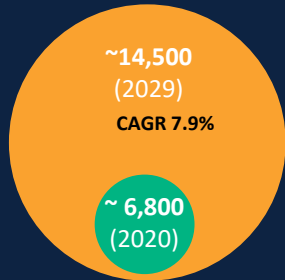
POST COVID-19 IFC REBOUND INCLUDES FREE WIFI TAILWIND

LONG TERM IFC INVESTMENT CYCLE

Expanding Fleets (2029)

COMMERCIAL AIRCRAFT
(Ka/Ku)

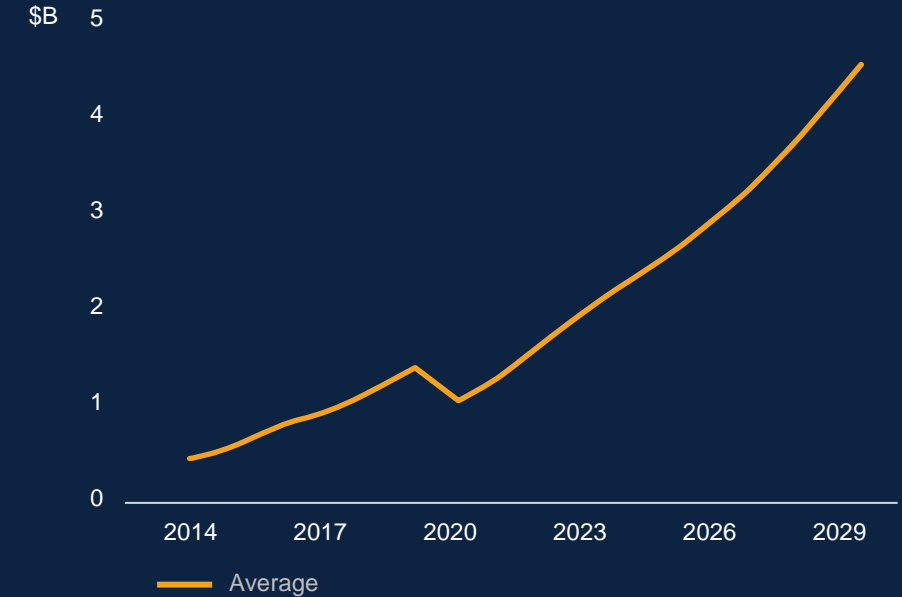
BUSINESS JETS
(Ka/Ku)



The Shift to Free WiFi



Service Revenues (Commercial Aviation)



Source: Valour 2020

Source: Euroconsult 2020

GROWTH OPPORTUNITIES DRIVEN BY INCREASE IN DEMAND AND MARKET PENETRATION



4G/5G UBIQUITOUS CONNECTIVITY BRIDGING THE DIGITAL DIVIDE

5G TOTAL ADDRESSABLE MARKET EXPANDING DRAMATICALLY



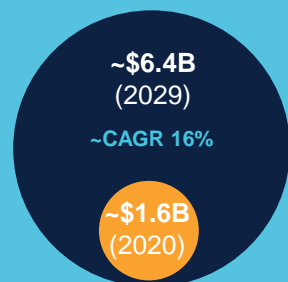
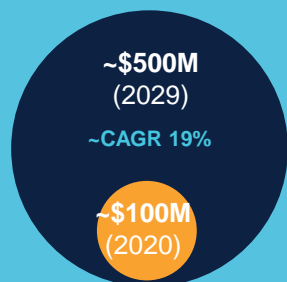
OF SATELLITE BACKHAUL
4G/LTE MARKET SHARE

{ GILAT, 2021 }

“ GILAT CONTINUES TO LEAD IN SHIPMENTS WITH BIG WINS AND BUSINESS EXPANSIONS WORLDWIDE ”

EQUIPMENT

CAPACITY, SERVICE & EQUIPMENT



{ NSR, 2021 }

MANAGED SERVICES

End-to-end service with recurring revenue



4G/5G UBIQUITOUS CONNECTIVITY BRIDGING THE DIGITAL DIVIDE

5G TOTAL ADDRESSABLE MARKET EXPANDING DRAMATICALLY

HIGH SPEED

Speeds
>1Gbps



Innovative
Wideband
Technology

FLEXIBLE NETWORK ARCHITECTURE

Satellite Ground
Segment Integration
Into 5G Eco-System



Utilize SDN/NFV,
Cloud, Edge Computing
& Network Slicing

LOW LATENCY

Order of Magnitude
Reduction in Latency



Leverage Our
NGSO Baseband





NGSO CONSTELLATIONS - ABUNDANCE OF CAPACITY

LARGE CAPITAL SPENDING IN SATELLITE INDUSTRY

GEO

35,786 km
~550msec

MEO

2,000-10,000 km
~120msec

LEO

500-2,000 km
~15msec



MORE THAN 50,000 LEO SATELLITES EXPECTED WITHIN A DECADE; INVESTMENT OVER \$30 BILLION



NGSO CONSTELLATIONS - ABUNDANCE OF CAPACITY

LARGE CAPITAL SPENDING IN SATELLITE INDUSTRY

GILAT'S PROVEN NGSO TECHNOLOGY



Gilat to provide ground segment for O3B mPower

LEO CUSTOMER

Potential of over \$50 million to supply gateway solid state power amplifiers



Successful demonstrations with Telesat's phase 1 LEO satellite





STRONG TAILWINDS IN DEFENSE

INCREASED FOCUS ON MILITARY SATCOM NETWORKS

Transportable



Military Aircraft



On-the-Move



Satcom Network



Unmanned Aerial Vehicle



On-the-Pause

GOVERNMENT & MILITARY SATELLITE COMMUNICATIONS

Expected Market Value
~\$930M in 2025

Source: NSR 2020

HIGH-BANDWIDTH REQUIRED IN BATTLEFIELD | EMERGING THREAT OF ELECTRONIC WARFARE



SUMMARY

UNIQUELY POSITIONED TO UNLOCK GROWTH OPPORTUNITIES



NGSO/VHTS Opening New Markets



**Leading in Main Growth Areas –
Cellular Backhaul (4G, 5G) &
In-Flight Connectivity**



**Increased Focus on Military
SATCOM Networks**



**Investing in Product Leadership
and Innovation**



Focused on Profitable Growth





THANK YOU

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