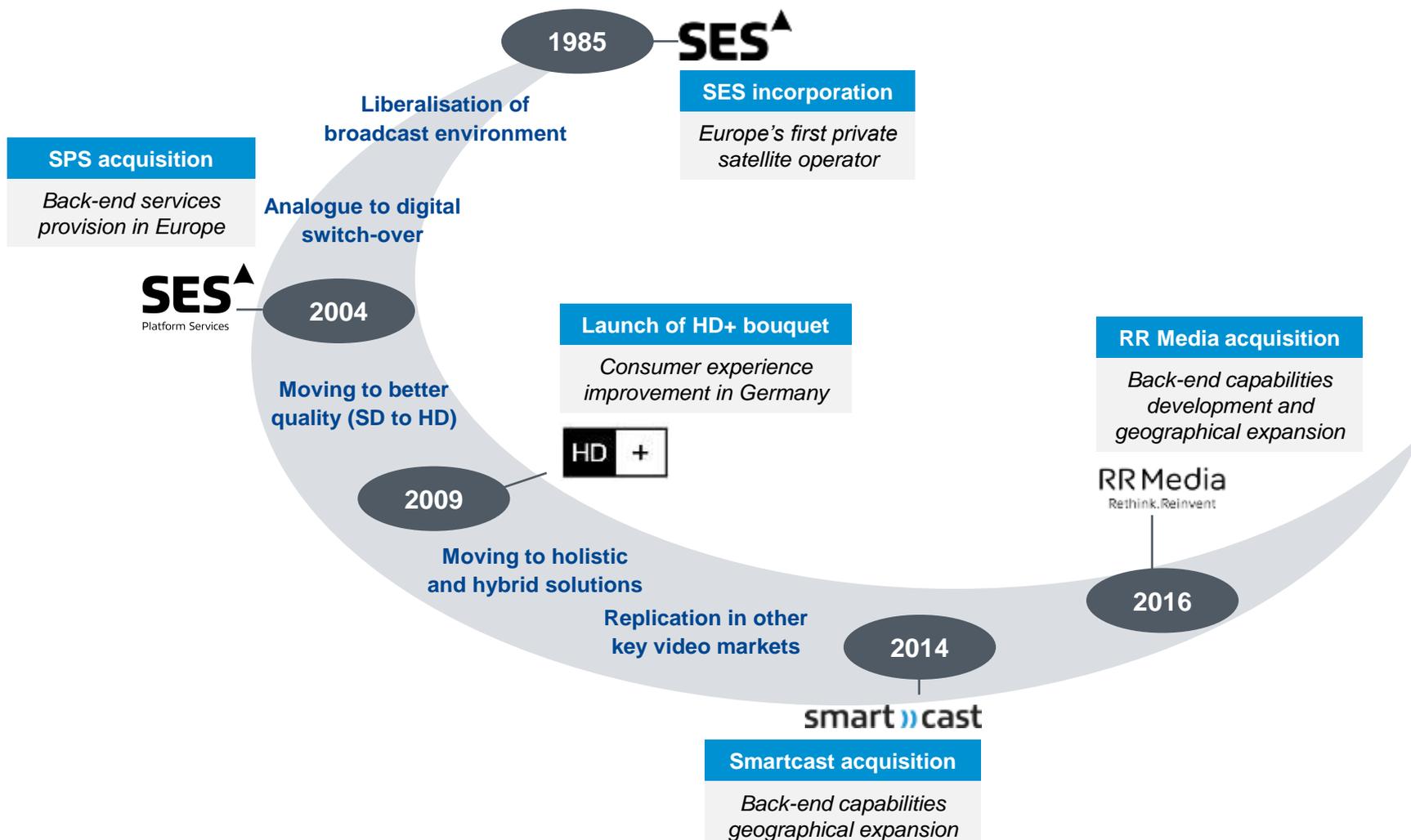


SES's growth accelerators: Media Solutions

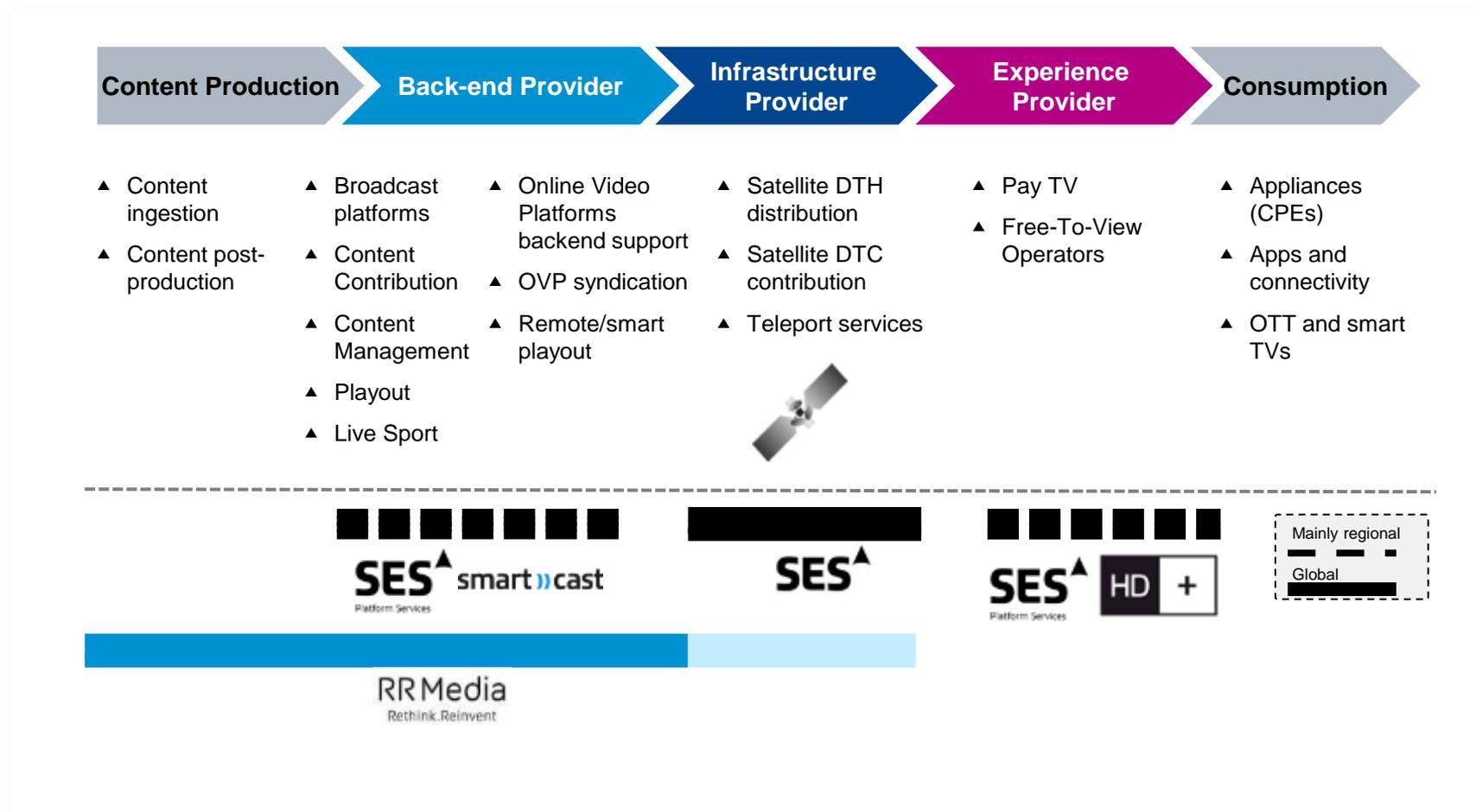
Wilfried Urner, CEO of SES Platform Services &
MSC Leader for Video

How services are complementing our satellite infrastructure



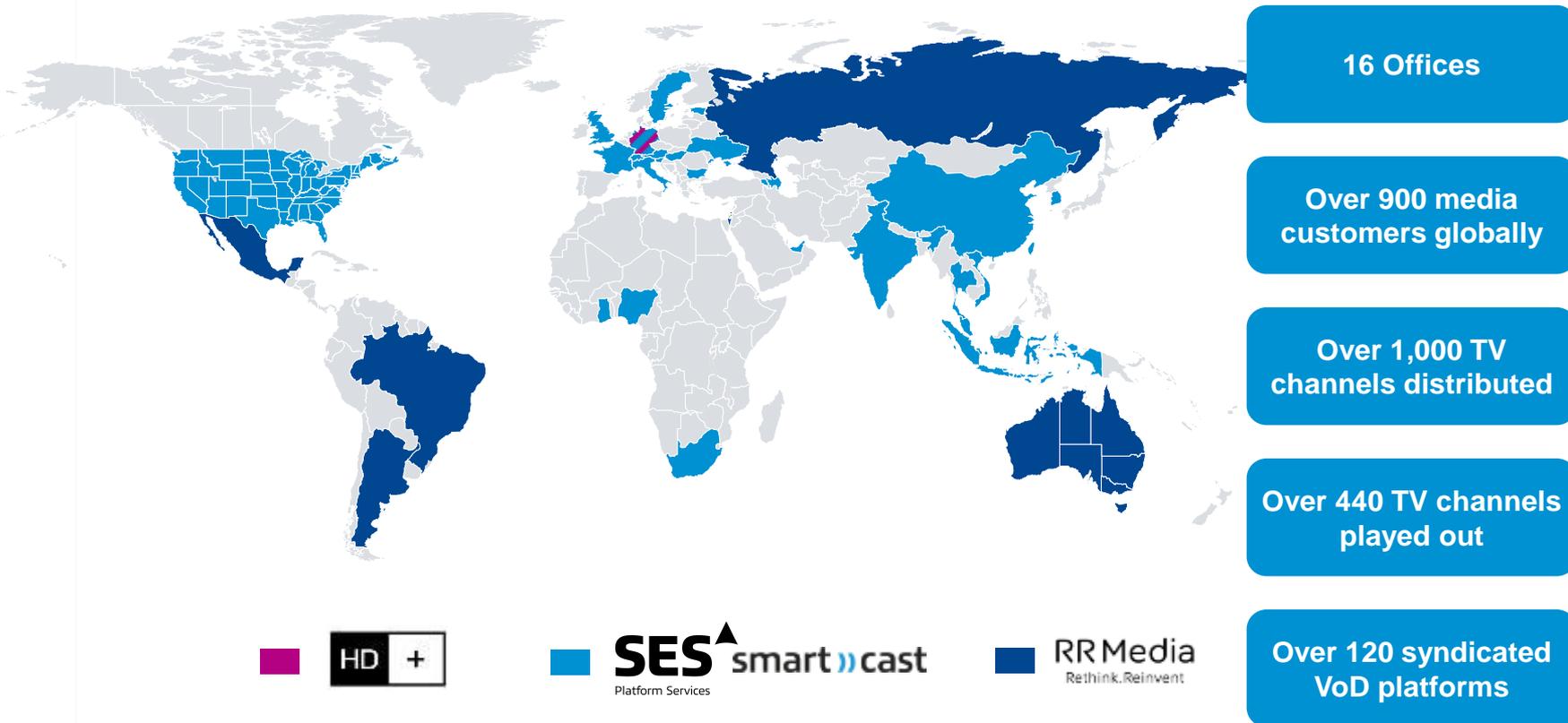
Providing comprehensive end-to-end media capabilities

▲ SES offers a full range of conventional and online video services to clients



Globalising SES's media services and solutions

- ▲ 97% of SES PS revenue from Europe; ~2/3 of RR Media revenue outside of Europe
- ▲ Providing global back-end services, based on local capabilities and innovative virtual solutions



Solid differentiation potential from other industry players

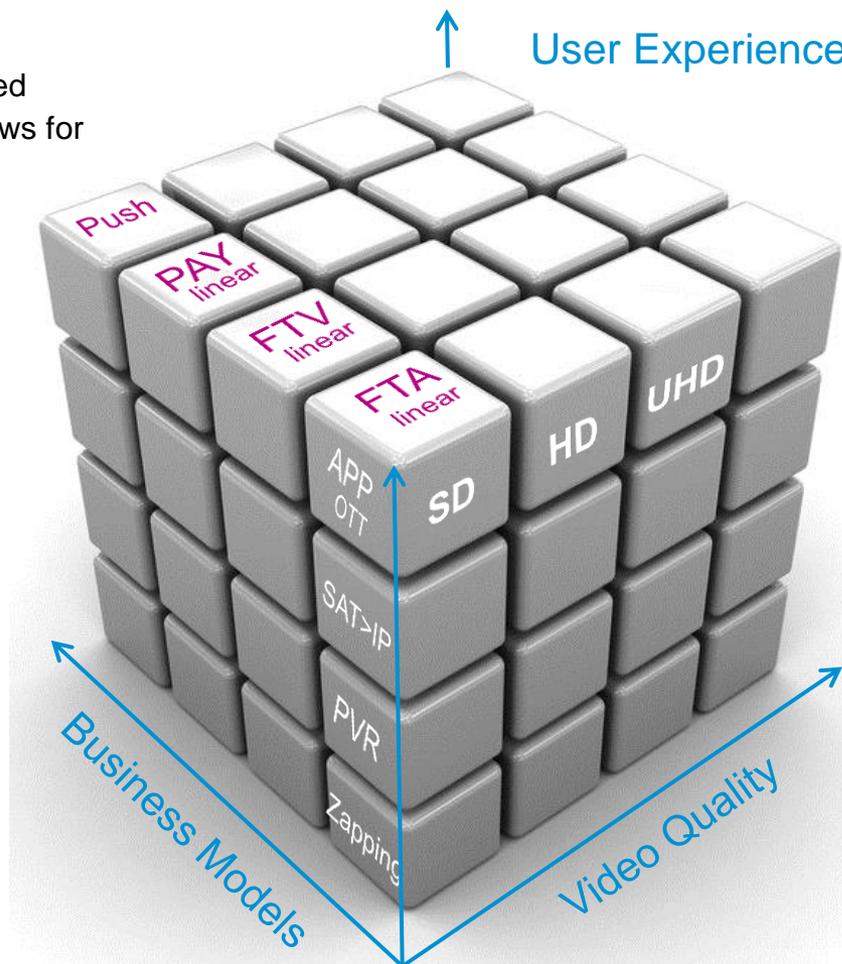
▲ SES best positioned to fulfil requirements for comprehensive media service delivery

	Satellite operators	Media solution providers	SES [▲]
<i>(A) Distribution Infrastructure</i>			
Satellite capacity	✓ [owned]	✓ [leased]	✓ [own]
Online distribution capabilities		✓ [leased]	✓ [leased]
<i>(B) Service Capability</i>			
Pure system capabilities		✓	✓ [partly]
Pure service platform capabilities		✓	
Full operational services	[limited]	✓	✓
<i>(C) Media Service Scope</i>			
Conventional Video Services		✓	✓
Online Video Services		✓	✓
<i>(D) Coverage</i>			
Regional Scope	Depending ✓ on provider	Depending ✓ on provider	
Global Scope	✓	✓	✓

Media toolbox

Media Toolbox offers a wide range of developed components and workflows for

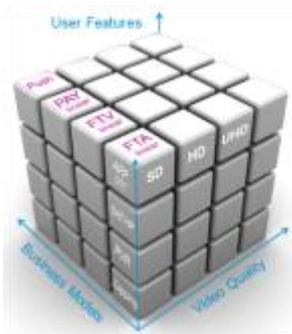
- ▲ DTH / DTC
- ▲ Multiscreen (Sat>IP)
- ▲ Online Video



Experience of **SES industry experts** ensures to deliver **cutting-edge technology** for your content business to realise the **best user experience**

Media toolbox is a one-stop-shop for DTH and OTT distribution

Providing a turnkey solution is the best way to approach SES's existing and new customers



Back-end services

- SOLID satellite services
- LUCID OTT distribution
- FLUID content management

Features

- Linear, catch-up, VoD, PVR
- SD, HD, UHD
- SAT>IP

Platform implementation

- HD+
- West-Africa Platform
- Home:TV
- UHD North America Platform

Case study: shaping the video market in West Africa

Task

- ▲ Foster the satellite neighbourhood with highly professional ground services:
 - Classic TV broadcasting
 - Promoting national analogue to digital transitions

Implementation

- ▲ Infrastructural set-up of high-end technical equipment directly in the region
- ▲ Teaming with proven local and national ground services partners
 - In Lagos/Nigeria: Computer Warehouse Group
 - In Accra/Ghana: partnership with K-NET
- ▲ Imposing similar quality levels as in other SES regions

Benefit

- ▲ Professional one-service approach for prospects in the region, allowing African local and national TV broadcasters to concentrate on content, whilst relying on the professional services of SES at adequate price levels



SES reaches **~4 million** TV households in Nigeria and Ghana

(with a ~300 thousand annual growth in Ghana since the launch of the platform in 2009)

SES distributes **~50 channels**

Case study: complementing satellite with terrestrial

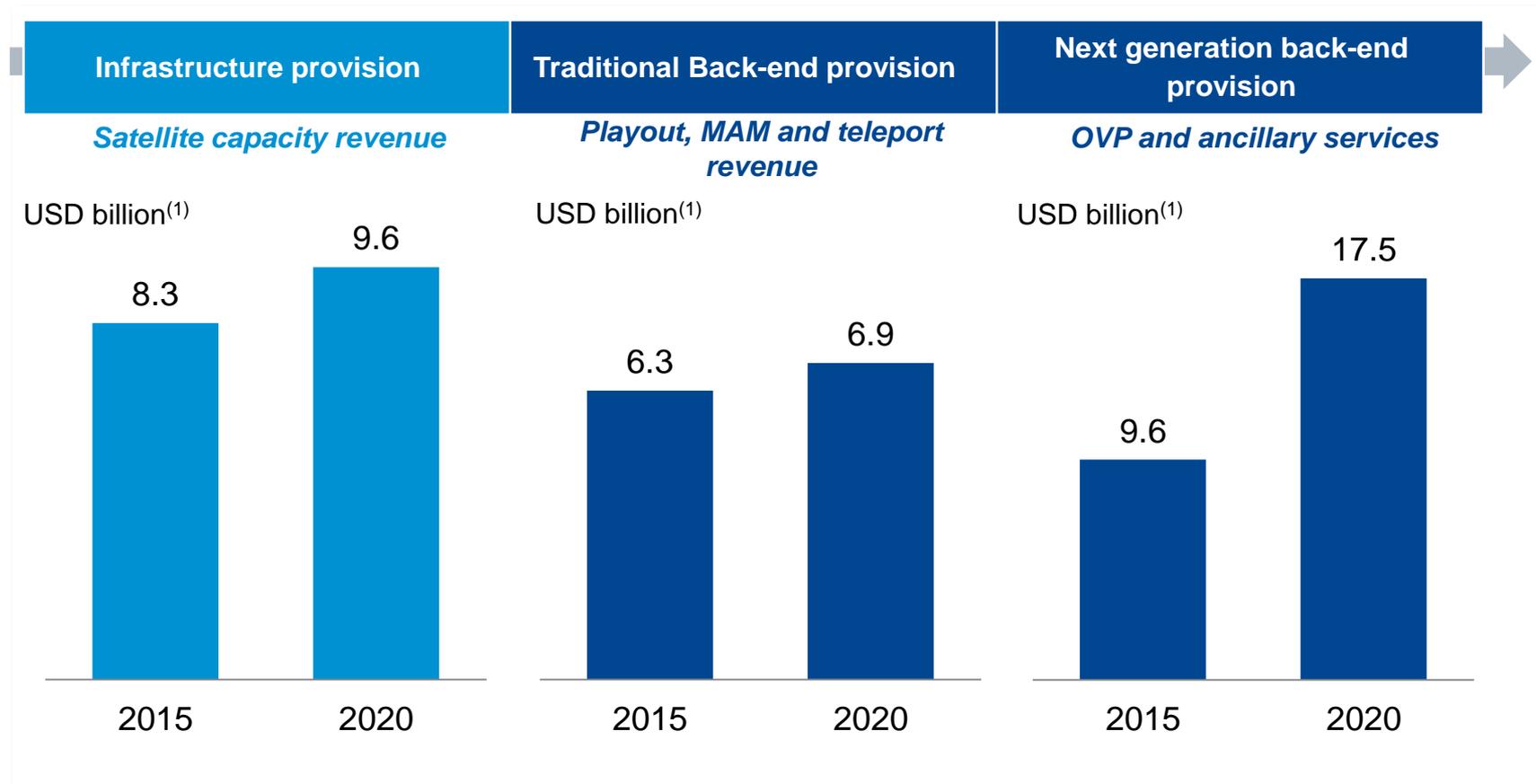
- ▲ Creating a pan-European TV Broadcast and VoD platform for expatriates in Europe
- ▲ Providing turnkey solution and allowing HOME:TV to concentrate on its core business



- HOME:TV established relationships to content partners worldwide (with the active support of SES)
- Putting together attractive packages that match the end customers' demand is a key competence of HOME:TV
- Feeding, encryption, multiplexing, up-link and downlink of the TV signal provided by SES
- 4-5 Playout, Set-Top Boxes, Smartcard Handling, Conditional Access System, App development, DRM, CDN by SES
- 6 Execute rollout, build the brand and acquire new subscribers by HOME:TV
- 7 Customer Relationship Management (CRM) and Subscriber Management System (SMS), lettershop, billing by SES

Growth potential on all parts of the value chain

▲ SES's world-leading media services provider well placed as a key growth accelerator



1) Source: NSR