



ENABLING THE NEXT VIDEO REVOLUTION

SES
beyond frontiers



**GLOBAL
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WITH SES



TRANSFORMING THE VIDEO LANDSCAPE

In today's fragmented media landscape, pay-TV operators in Latin America need to reinvent their content delivery models to better fulfil demand for more content choices and high-quality HD services.

Ultra-High Definition (Ultra HD) is taking video quality to new heights, fuelling the launch of larger, more powerful screens. At the same time, online video viewing is fast gaining popularity, pushing video content to every screen, on every device.



**ULTRA HD SERVICES
ARE HITTING THE
MAINSTREAM**



**CONSUMERS WANT MORE
MULTISCREEN CHOICES AND
ENRICHED VIEWING EXPERIENCES**

Demand for pay-TV is booming globally. It's time to reinvent your business models and consider how best to keep up with consumer demands for new viewing experiences – at any place and any time, across any device.



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OPPORTUNITIES AND CHALLENGES ABOUND

The total pay-TV revenue in Latin America is estimated to reach US\$19.5 billion by 2021 — a 9% growth from US\$17.9 billion in 2015¹.

Large video markets such as Brazil and Mexico will continue powering the pay-TV industry in Latin America, while momentum is growing in the region's developing economies. Across Latin America, we see a surge in demand for flexible video services across multiple platforms and screens, while the transition from SD video to commercial HD content continues to accelerate.

This is a huge opportunity to tap. Satellite direct-to-home (DTH) broadcasting will play a vital role in the pay-TV growth momentum — enabling operators to meet growing subscriber demands with competitive pay-TV packages. Leading DTH platforms are also driving the growth of premium video-on-demand (VOD) services in Latin America.

The road to video growth is not without challenges. Key considerations include bringing in new content delivery methods for broadcasters to keep up with consumer demands and to differentiate their channel offerings from competitors'. In short, the technology and business models must keep pace.



¹ Digital TV Latin America Forecasts, March 2016, Digital TV Research



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HERE'S HOW SATELLITES CAN HELP



INCREASING ULTRA HD CHANNEL REACH

Satellites provide the bandwidth availability and wide footprints that enable viewers to receive the same quality signal for Ultra HD broadcasting wherever they may be located within the satellite coverage area



ENHANCING QUALITY OF VIDEO EXPERIENCE

Thanks to advances in compression technology, satellite is the ideal delivery method for bringing Ultra HD video content to millions of households



DELIVERING ECONOMIC EFFICIENCY

Ultra HD is delivered to viewers in High Efficiency Video Coding (HEVC), which reduces bandwidth requirements as compared to previous standards and make Ultra HD broadcasting affordable

With the right satellite capabilities, broadcasters are now better positioned to grow their channel count and deliver richer video experiences to more audiences in a profitable manner.



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ENABLING ENTERTAINMENT EVERYWHERE

Pay-TV operators need to be equipped with the capabilities to launch new platforms via linear and non-linear distributions.

The emergence of over-the-top (OTT) services is a major disruptor in broadcasting. Here's why: in 2011, when Netflix launched its streaming services in Latin America, it prompted many pay-TV operators to start bundling multiscreen, on-demand viewing options with their main channel offerings.

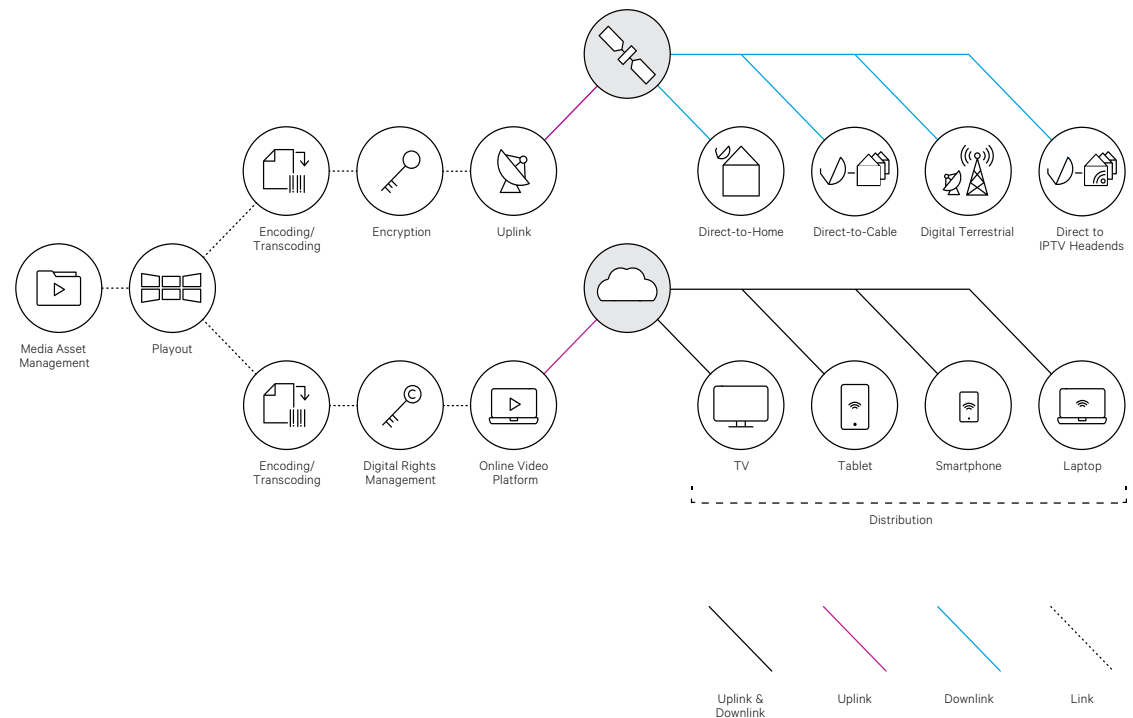
The OTT market in Latin America was worth an estimated US\$756 million in 2015, with about 60% growth between 2012 and 2015².

This rise is expected to continue impacting the broadcasting sector. "Cord cutting", which alludes to viewers cutting off traditional TV connections to watch video and TV online, is seen as the way of the future.

But, it's much more complex in reality. Non-linear video platforms are driving the need for hybrid networks, which integrate satellite into terrestrial infrastructure. This enables broadcasters to deliver seamless video experiences that's both linear and on-demand.

HYBRID NETWORK FOR VIDEO DELIVERY

Satellite and terrestrial networks can work together to provide high quality video everywhere



² Research and Markets, Over-the-top Video Services Market in Latin America, May 2016



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THE FUTURE VIDEO ECOSYSTEM

As the world-leading satellite operator, SES has the full capabilities to deliver the ultimate viewing experience to audiences across Latin America.



The SES fleet in Latin America currently broadcasts 780 channels to 25 million homes across the continent

We have delivered future-oriented innovations for the video industry, built on powerful capacity and high-quality services

We have been at the forefront of HD video development, being the first satellite operator to broadcast a commercial Ultra HD channel

Our satellites help broadcasters deliver more than 7,400 digital TV channels, including more than 2,400 HD channels, to over 317 million homes worldwide

The new MX1 subsidiary will deliver linear and non-linear content of the highest standard to different devices and formats, and via all distribution channels

Our ambitious satellite launch plan, such as the upcoming SES-10 in Latin America, will continue to feed the increasing bandwidth requirements of today's video ecosystem

Beyond capacity, SES's video customers can access a full range of tailored video distribution services – from playout services to media platform creation

¹ Digital TV Latin America Forecasts, March 2016, Digital TV Research



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MAKING THE ULTRA HD LEAP

The Latin America video industry is well poised for a transformation in video content quality

It is forecasted that the number of pay-TV HD channels in Latin America will double to reach 743 by 2021³. This growth is directly linked to satellite availability. While satellite is ideal for Ultra HD transmissions, a challenge facing broadcasters is translating the innovative technology into a viable business model.

If an increase of the picture resolution by a factor of four translates into the same increase in related capacity cost, Ultra HD transmissions can become prohibitively expensive. That is why the HEVC standard has made such commercial inroads by helping broadcasters today to transmit Ultra HD at less than four times the HD capacity.

As one of the largest digital video platforms in the world, SES has supported these developments right from the start. Broadcasting more than 780 TV channels to 25 million homes in Latin America, we are in pole position to help pay-TV operators drive the commercial Ultra HD momentum forward.

KARIM MICHEL SABBAGH

PRESIDENT & CEO OF SES (MAY 2016)



“When all is said and done, SES enables the broadcasting of more HD video channels than the next three competitors combined. In the same vein, we are the first satellite operator (and remain to this date the only one) to bring commercial UHD video to the masses by working closely with broadcasters to enable their capabilities into this new era.”

SES ULTRA HD CUSTOMER CASE STUDIES:

- [US cable operators conducting first Ultra HD trials with SES](#)
- [Sky Deutschland's first Ultra HD channels to broadcast on SES satellite](#)
- [Viasat broadcasting the Olympics in all their Ultra HD glory to the Nordics](#)

³ Dataxis TV Tracker, June 2016



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UNLOCKING MULTISCREEN OPPORTUNITIES

The rise of connected homes and the mobile-first consumers has significant implications on how video content is being consumed today.

With the surge in connectivity, video services are increasingly delivered in Internet Protocol (IP) format – enabling content to be distributed over multiple interfaces, formats and screens.

To meet this need, SES boosts the frequency of crossing satellite with IP systems, at network head-ends as well as in consumer homes. At head-ends, SES plays out its strengths as a primary infrastructure provider, where satellite efficiently feeds into other infrastructure such as cable. More recently, this has transitioned to digital terrestrial systems where satellite supports the digital switchover and covers

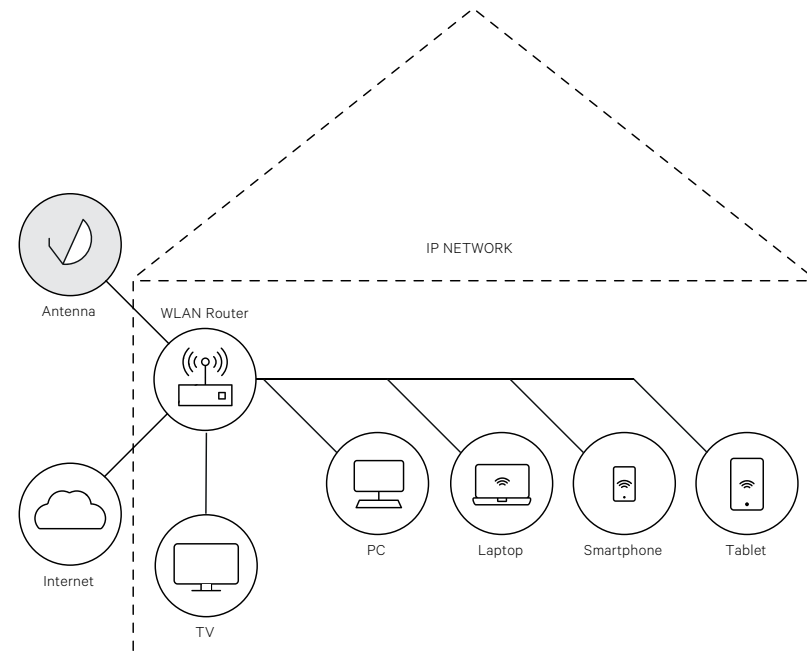
remote areas otherwise too costly to be covered by cell towers and antennas.

SAT>IP, a technology developed through SES leadership, further converts satellite signals into IP and broadcasts the converted content wirelessly throughout the home. This allows satellite broadcasts to be received on any screen in any room on any device, with several channels transmitting in parallel to multiple devices.

These new technologies reinforce satellite's role in delivering to video distribution networks, promising new possibilities for customers.

COMPARISON: SAT>IP VS. OTT

SAT>IP converts satellite signals into IP and broadcasts content wirelessly throughout the home. This allows uncompromised quality, on any screen, in any room, on any device, with several channels transmitting in parallel to multiple devices.





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VIDEO GROWTH IN LATIN AMERICA

Discover how our fleet presence and satellite service offerings in Latin America provide the perfect bandwidth capabilities to deliver the right content, to the right audiences, at the right time.



We are committed to the region

The launch of the **new SES-10** further boosts our ability to connect subscribers in Latin America, unlocking a video market of immense potential.



We can support customers with more than capacity; bringing facilities and services

- Scheduled for launch at the 67°W orbital position in Q4 of 2016
- 60 Ku-band transponders for DTH broadcasting services, with an optimum elevation angle for Latin America
- Extensive coverage from Mexico to Argentina in 3 beams
- Access to a host of value-added media solutions from SES



We bring capabilities across the value chain to serve broadcasters



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NEW POSSIBILITIES AWAIT



Visit our **SES-10** site to find out more.



Contact us to arrange for a one-to-one consultation with SES, and learn how we can help you unlock your growth aspirations in Latin America and beyond.

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EXPLORE NEW FRONTIERS WITH US

SES is the world-leading satellite operator. By providing reliable and secure satellite communications solutions, we connect and enable broadcast, telecom, corporate, and government customers—enriching the lives of billions of people worldwide.

We own and operate a fleet of over 50 geostationary satellites, complemented by a network of teleports and offices around the globe. This far-reaching infrastructure enables us to reach 99% of the world's population.

Our business is built on four market verticals: video, enterprise, mobility, and government. As the leader in direct-to-home (DTH) and High Definition (HD) television, SES transmits over 7,300 TV channels around the world; of which 2,300 of them are in HD. Our satellites reach 317 million TV homes worldwide and over 1.1 billion people around the world.

Beyond video, we enable businesses and communities with reliable data connectivity services. Broadband connectivity delivered via our satellites is enriching the data experience on ships and airplanes, and caters to the diverse connectivity needs of governments and institutions.

Through our ownership of O3b Networks, we are the first satellite provider in the world to deliver a differentiated GEO-MEO offering with powerful capabilities across numerous market segments and geographies.

Our fleet of 21 satellites in the Americas are positioned at prime orbital positions to offer comprehensive coverage and unparalleled reliability. New satellites scheduled for launch include SES-10, SES-14, and SES-15, covering strategic locations in North and Latin America.



NEW SES-10 TO UNLOCK NEW POSSIBILITIES

Located at 67°W, SES-10 is at the heart of our strategy to help broadcasters, enterprises and service providers to tap into the enormous potential across Latin America and the Caribbean. The new satellite will feature a payload of 60 Ku-band transponders tailored for DTH broadcasting and data connectivity services.



To learn more about SES-10, please visit our website.