

SES VIDEO



IBC Press Presentation

PRESENTED BY

Deepak Mathur, EVP, Global Sales,

SES Video

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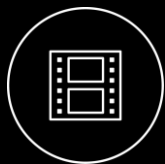
Wilfried Urner, SVP, Media Platforms &
Product Development, SES Video

PRESENTED ON

14 September 2017

ENTERING THE GOLDEN AGE OF VIDEO

VIDEO MARKET IS THRIVING WITH



Content
consumption
exploding



Increasing
appetite
for HD



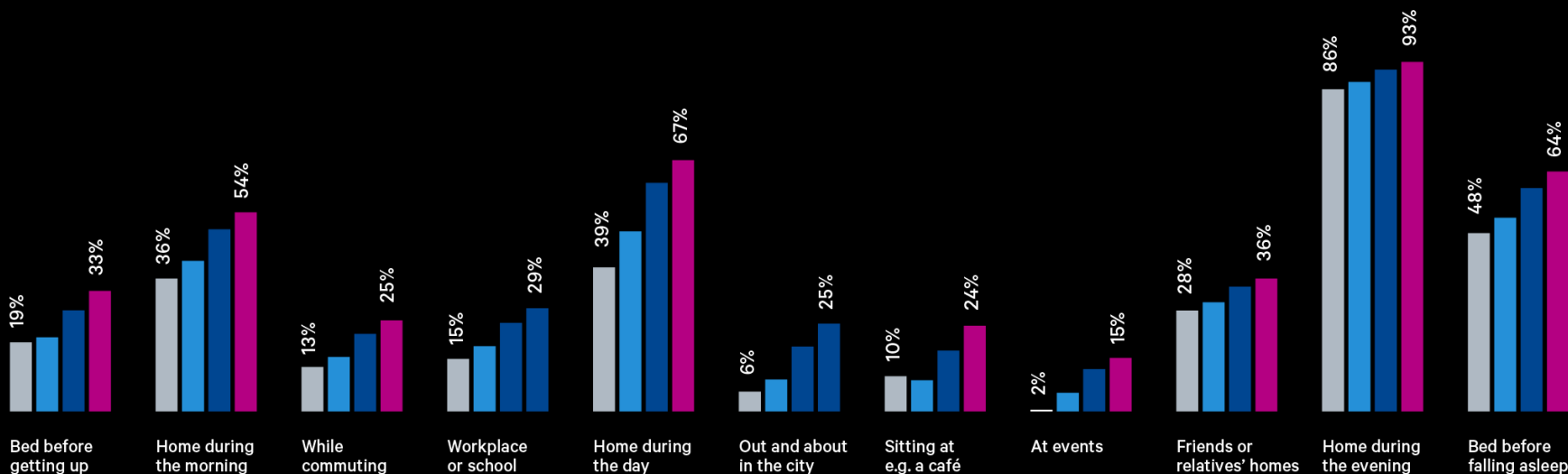
Digital TV
homes
yet to come



Content Consumption on the Rise

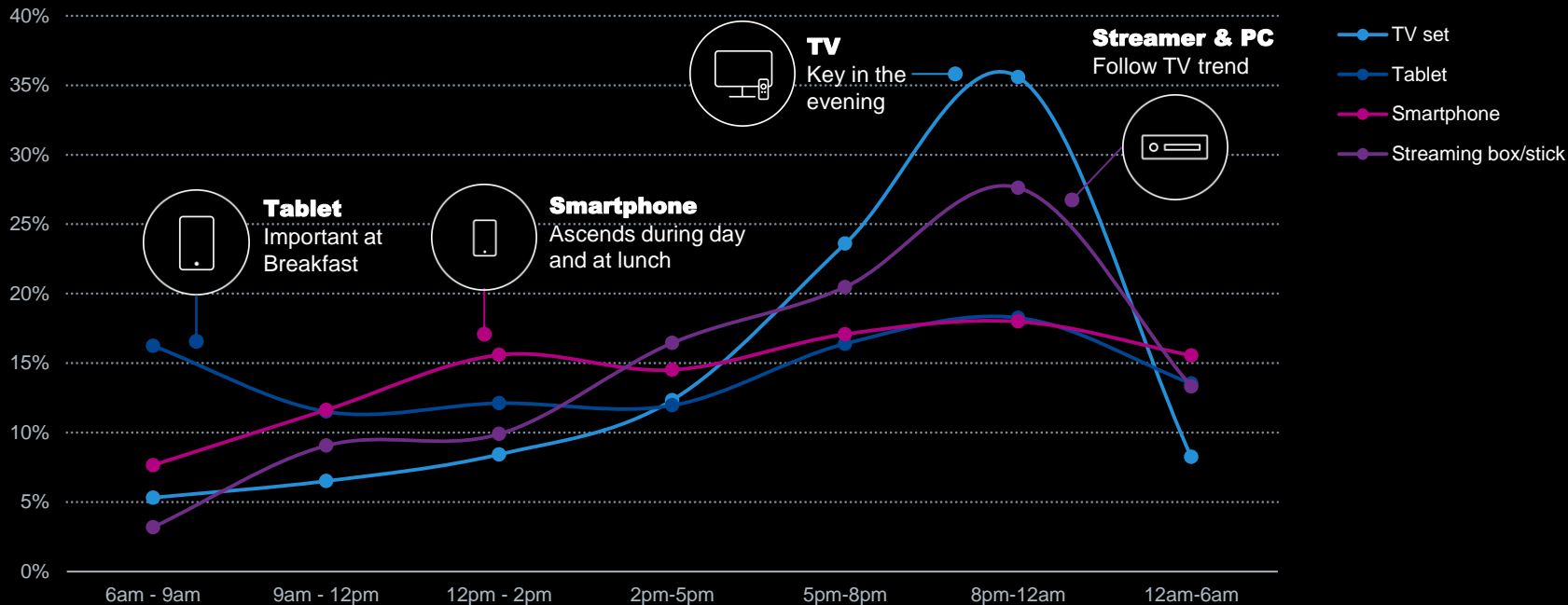
Percentage of consumers that watch any type of TV/video content in different situations on a weekly basis, comparison across years

■ 2013 ■ 2014 ■ 2015 ■ 2016





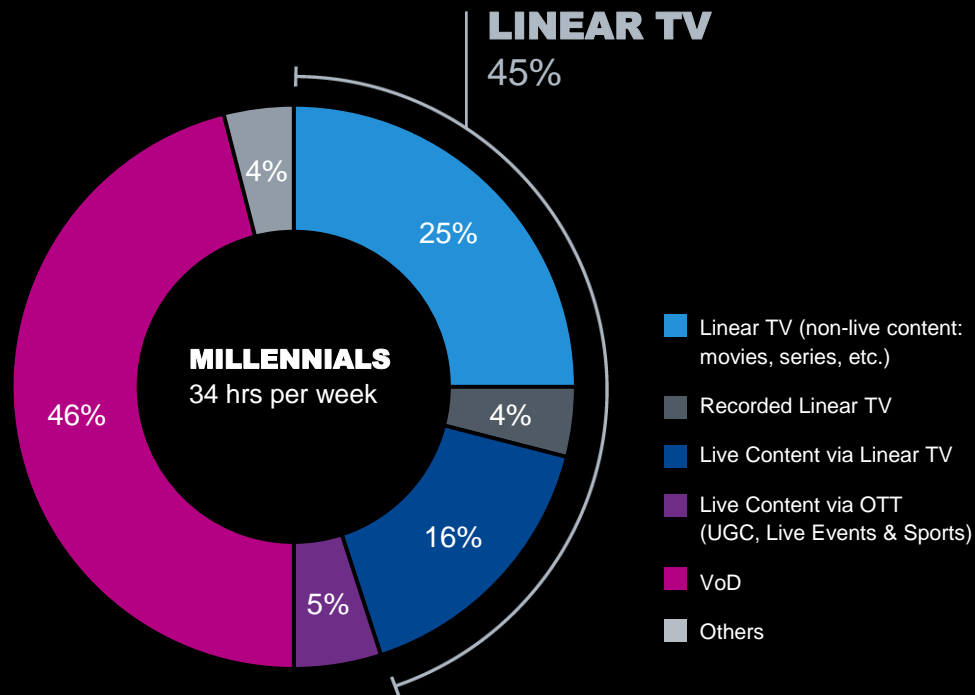
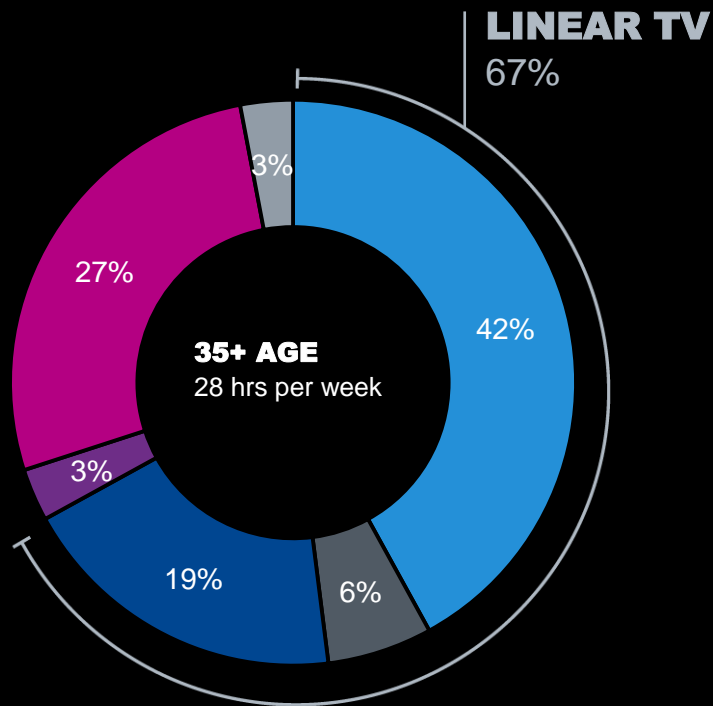
TV Remains Key Form of Entertainment In the Evening



Source: Ampere Analysis 2017 – Based on 11 markets across Europe, USA, Brazil



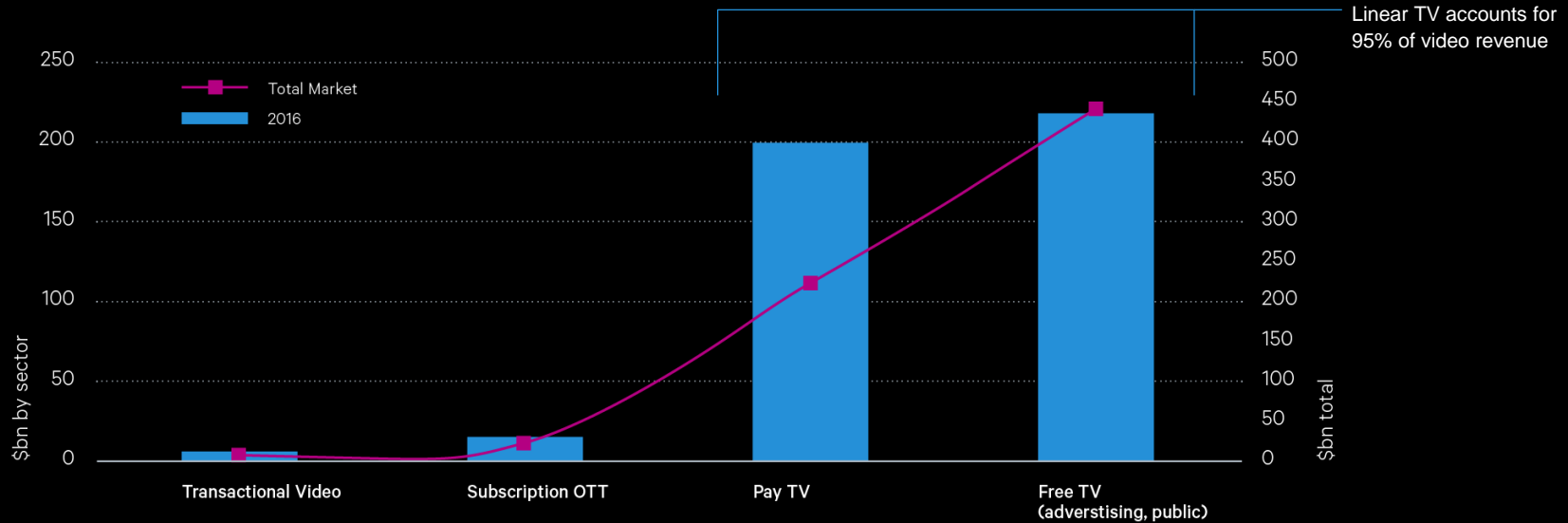
Linear TV Watched by All, Millennials Included!





TV Revenue: Show Me the Money

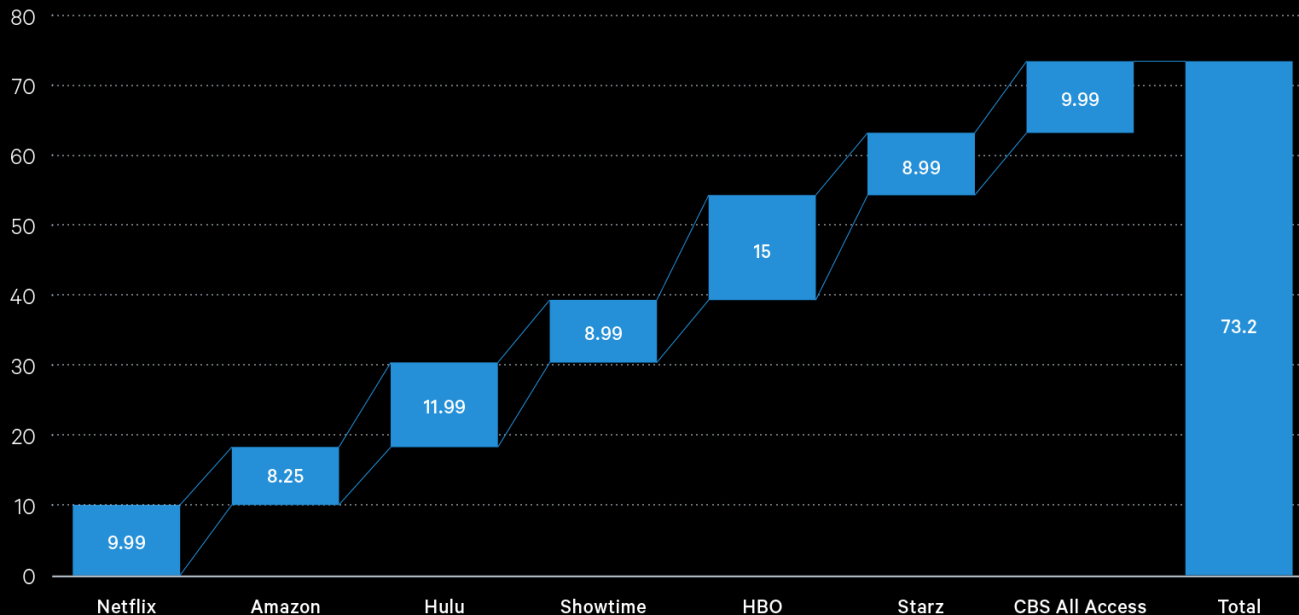
Linear TV accounts for 95% of video revenue globally





OTT: Show me the Savings?

Monthly SVoD service price waterfall (\$ customer/mth)



- OTT subscriber growth is in Pay TV homes rather than cord-cutting
- Stacking up OTT subscriptions = cost of 1 pay TV package, but with less convenience



The Winning Strategy: Offering Ubiquitous Viewing Experience

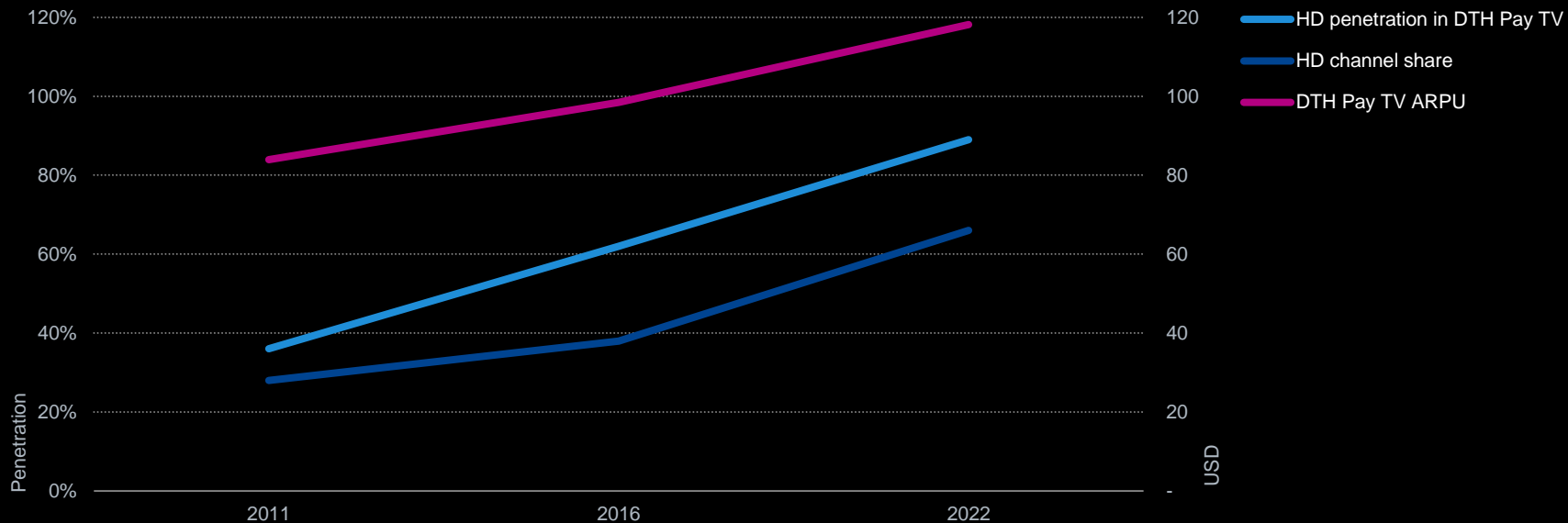


- Consumers look for TV packages that offer both linear TV and OTT



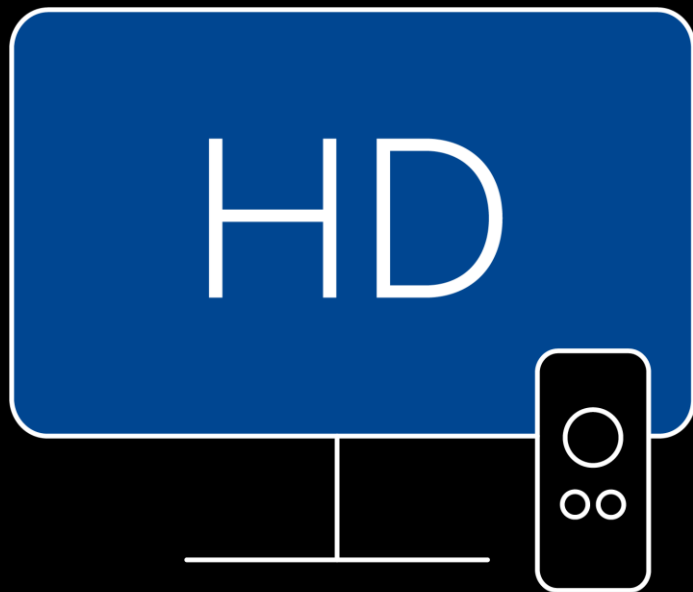
HD Drives TV Revenue

US TV Market





HD to Reach a New High



Quadruple
the number of HD
channels
worldwide from
2012 to 2025



More Digital TV Homes to Come

Regions	Analogue homes (YE 2016)	Non-TV homes (YE 2016)
Europe	38m	13m
North America	2m	7m
Latin America	42m	15m
Asia-Pacific & Middle East	197m	201m
Africa	36m	132m
Total	315m	368m

4 out of 10
homes

have
no access to digital
TV
or TV at all

2 billion

people who are under
/ unserved

Differentiated Strategy through Two Business Units



SES VIDEO

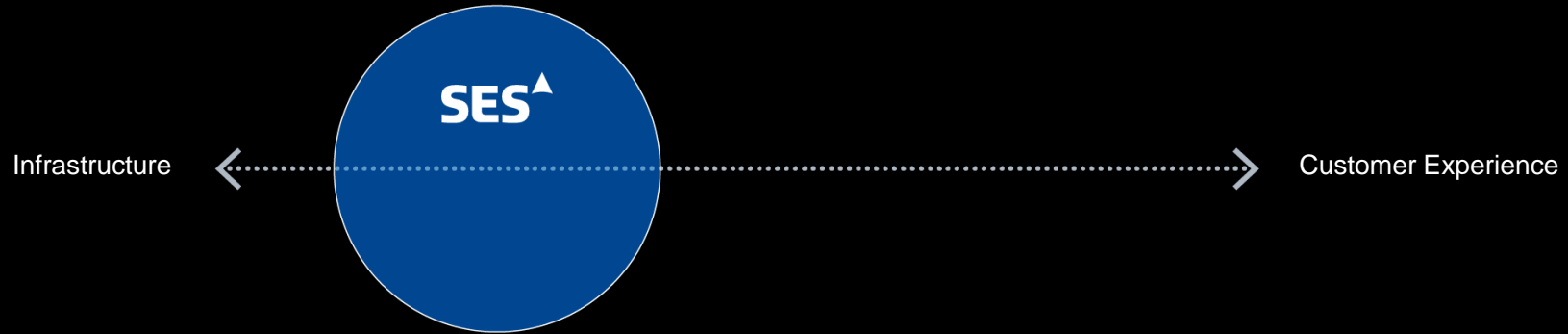


SES NETWORKS

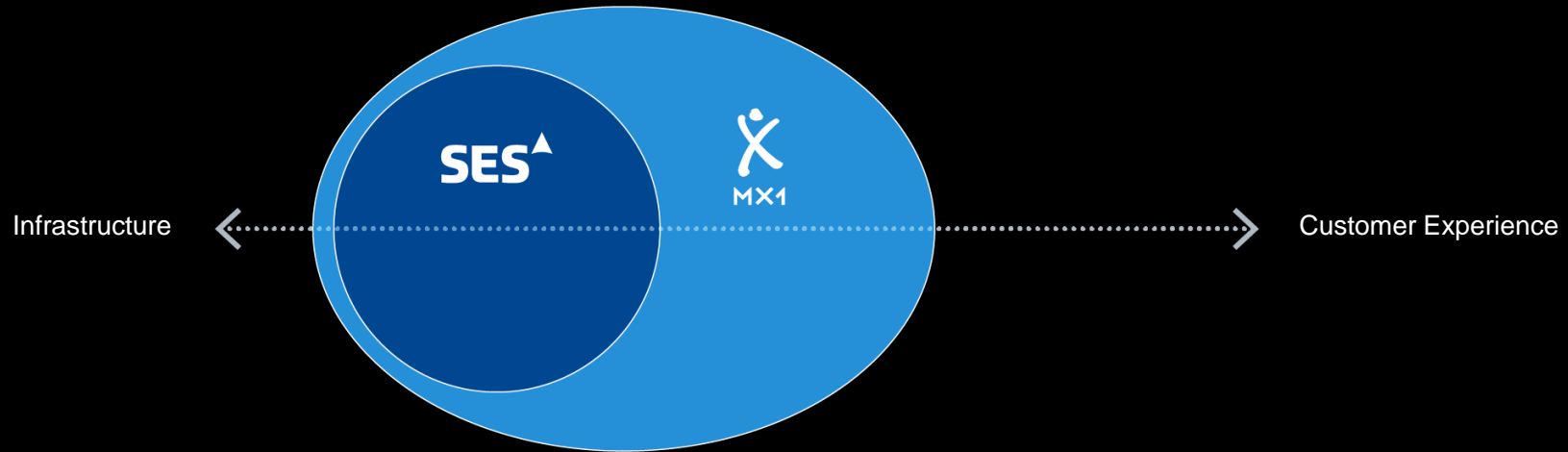
SES Video: Expanding Circles of Influence



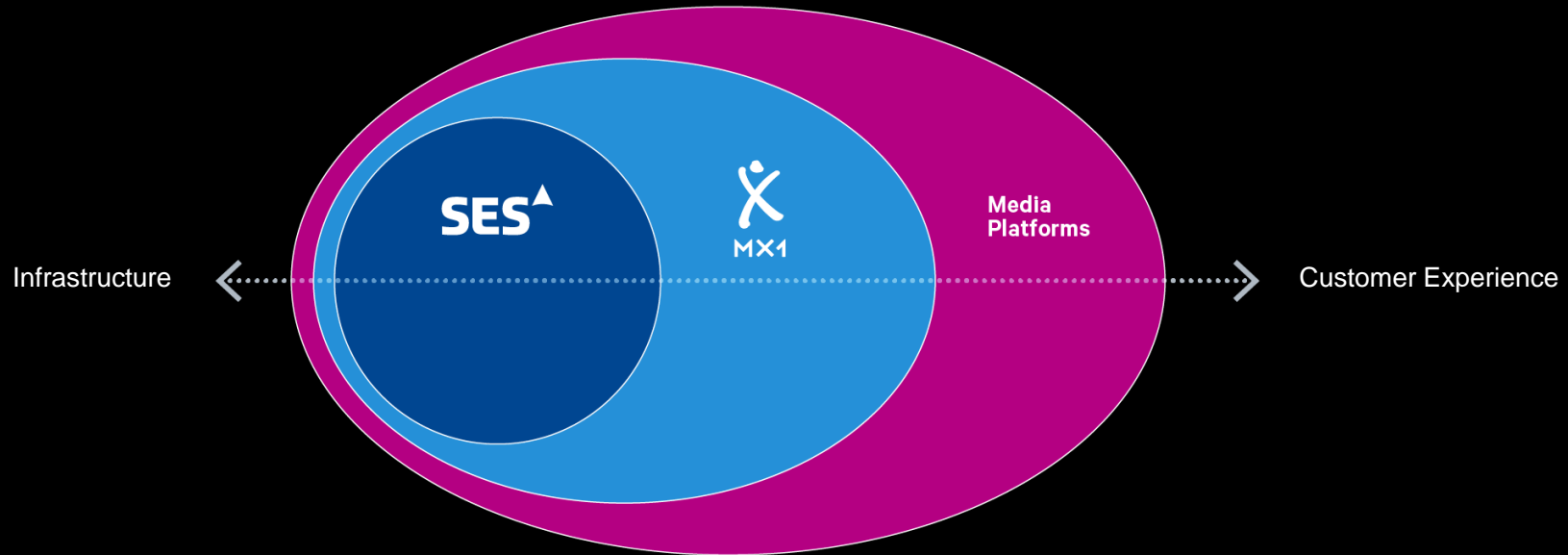
SES Video: Expanding Circles of Influence



SES Video: Expanding Circles of Influence

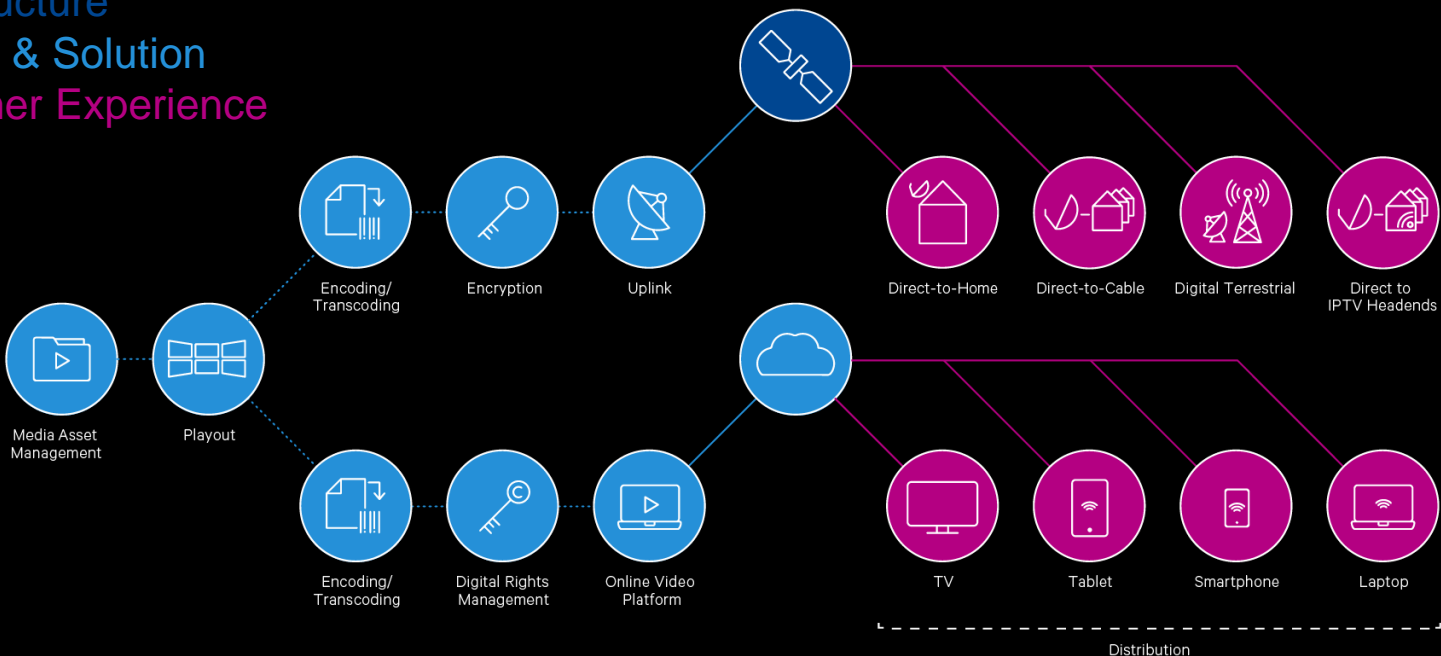


SES Video: Expanding Circles of Influence

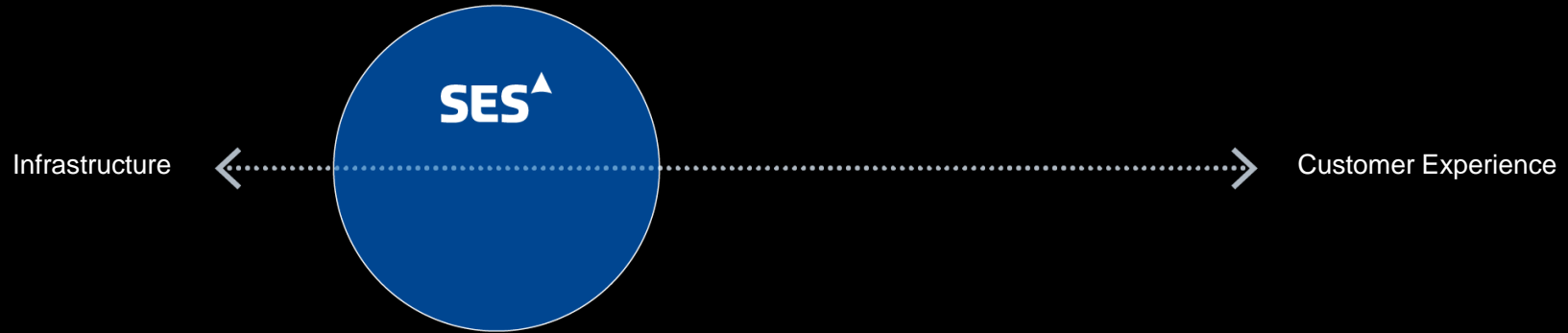


Serving the Evolving Needs of our Customers

Infrastructure
Service & Solution
Customer Experience

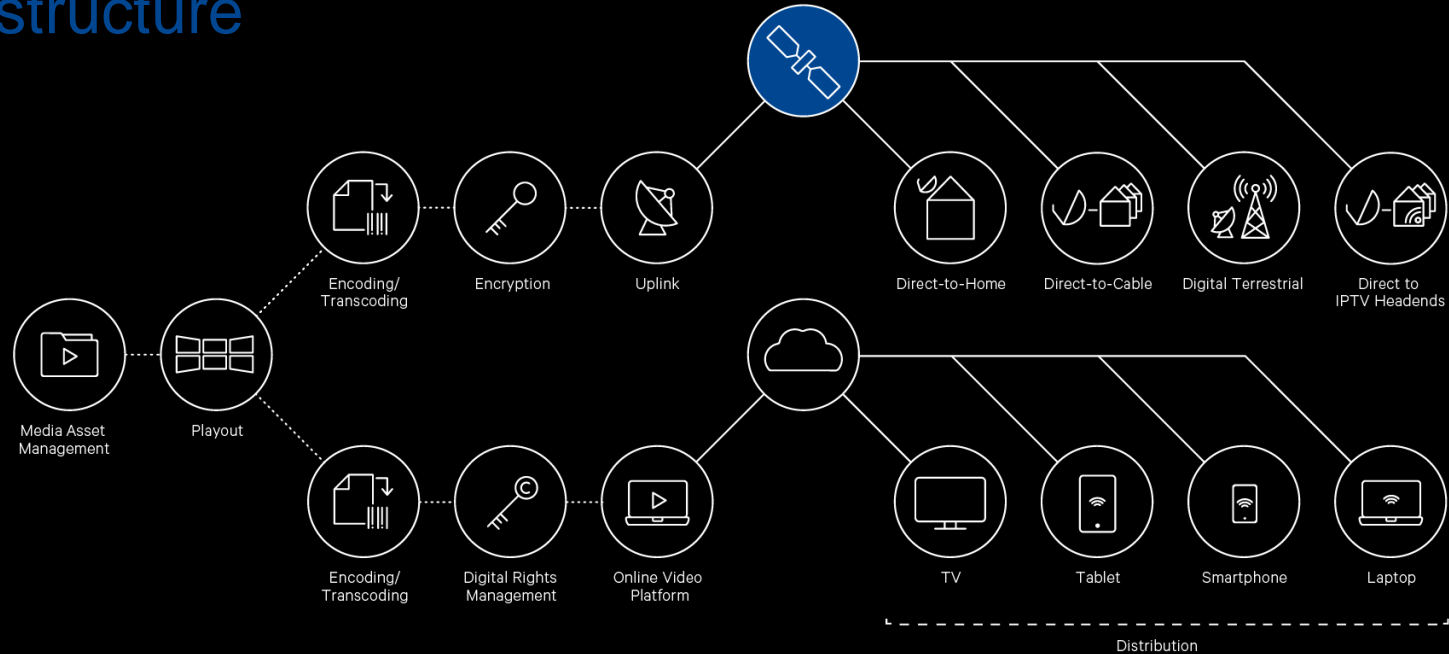


SES Video: Infrastructure



Serving the Evolving Needs of our Customers

Infrastructure





1 BILLION VIEWERS



**325 MILLION
HOMES**



**7,741 TV
CHANNELS**



**2,587 HDTV
CHANNELS**

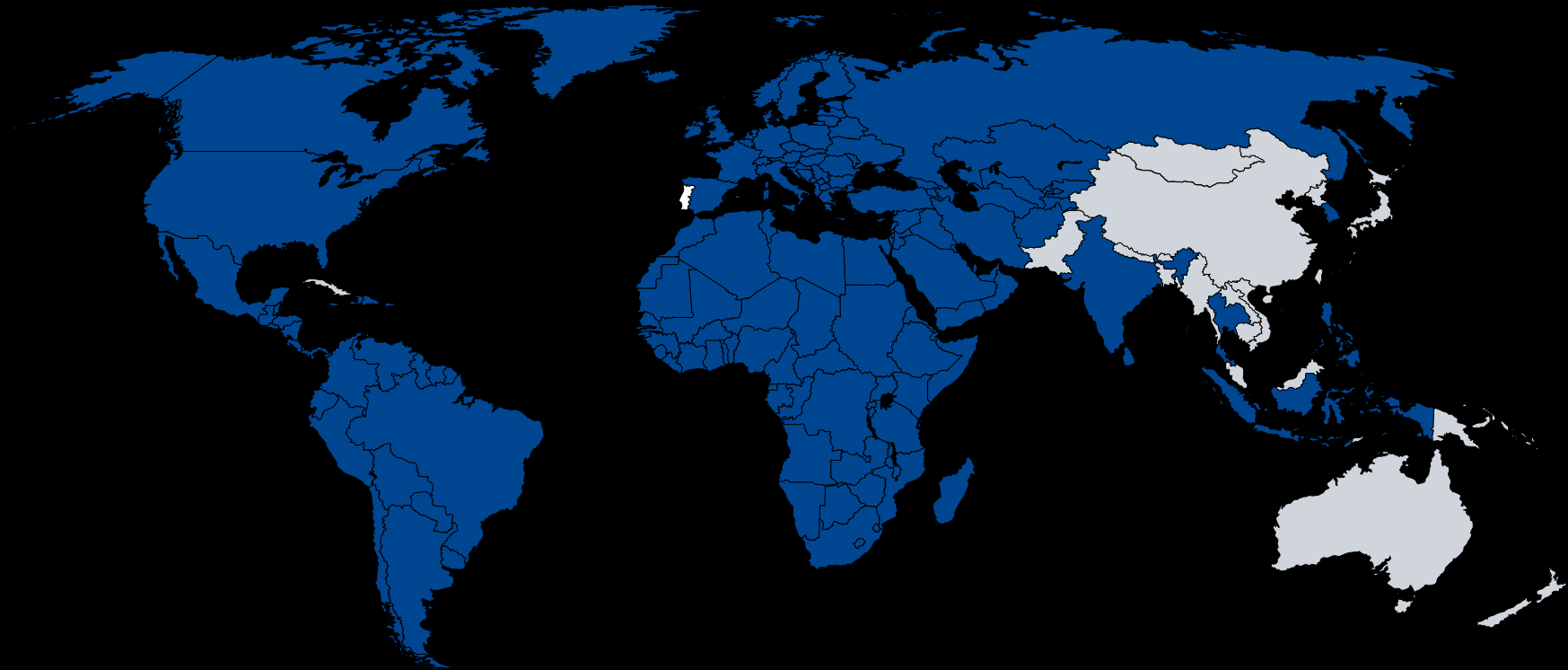


31 ULTRA HD CHANNELS

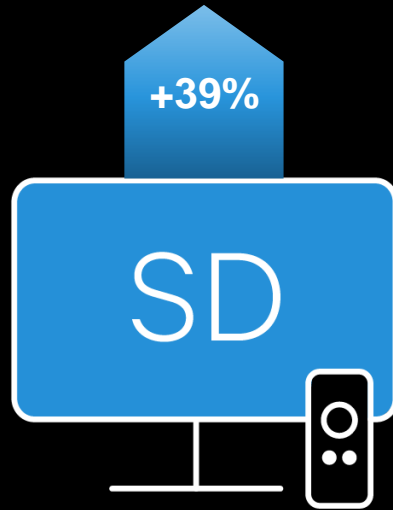


**40+ DTH
PLATFORMS**

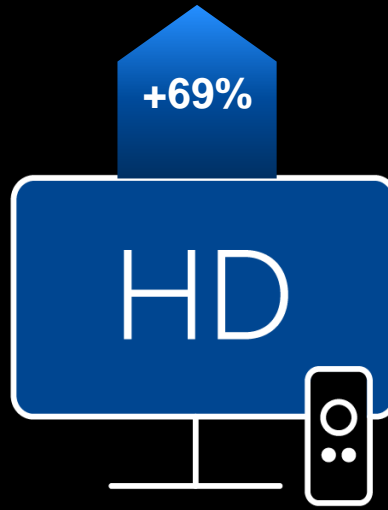
SES Video Infrastructure: Countries Served by Customers



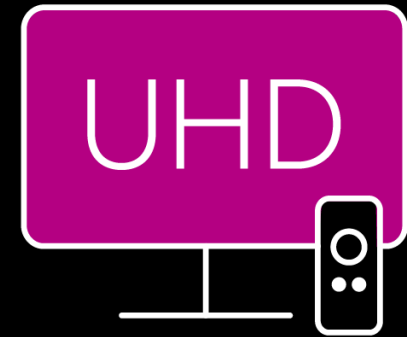
SES Video TV channels up 39% since 2012



YE12 ▶ **H1-17**
5,546 7,741

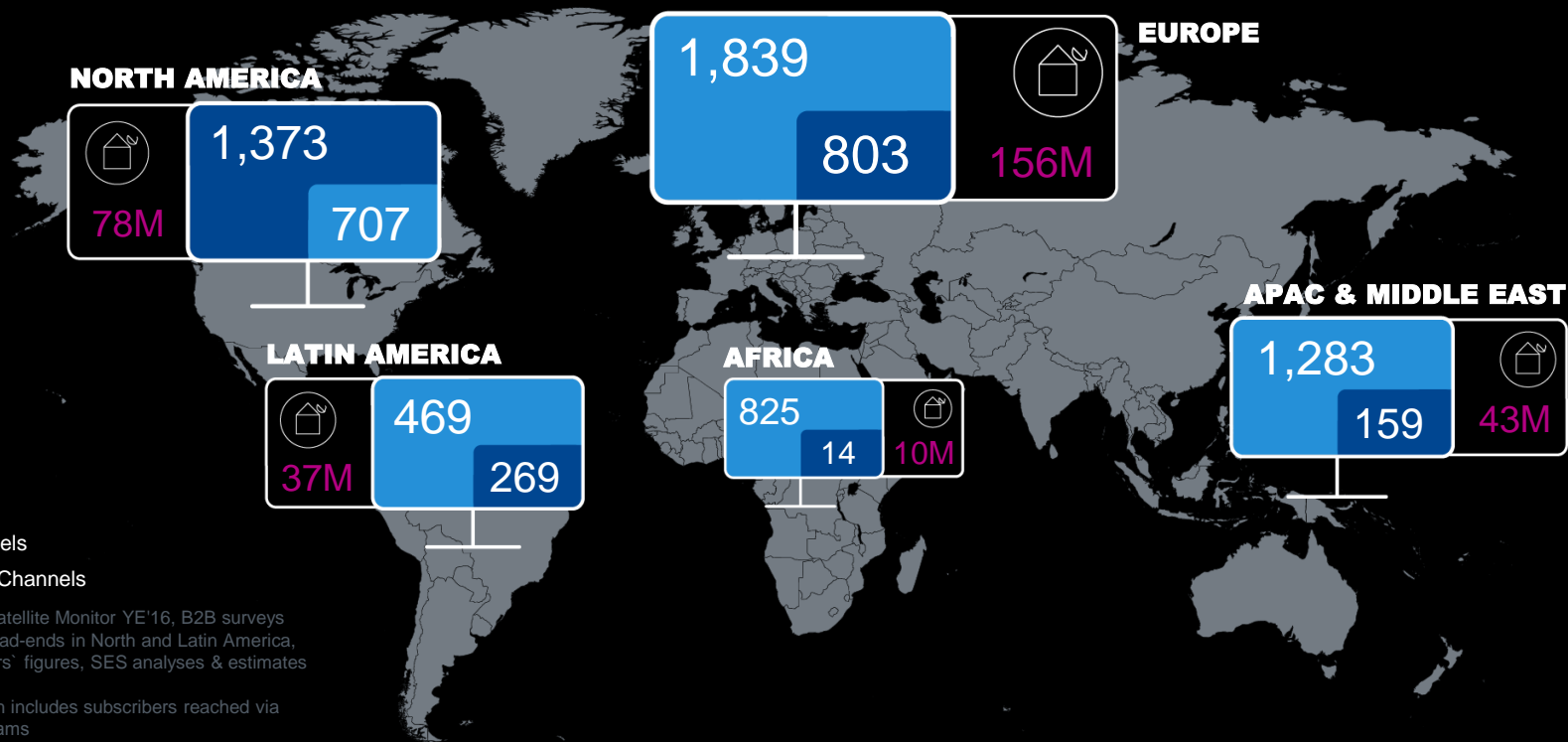


YE12 ▶ **H1-17**
1,535 2,587

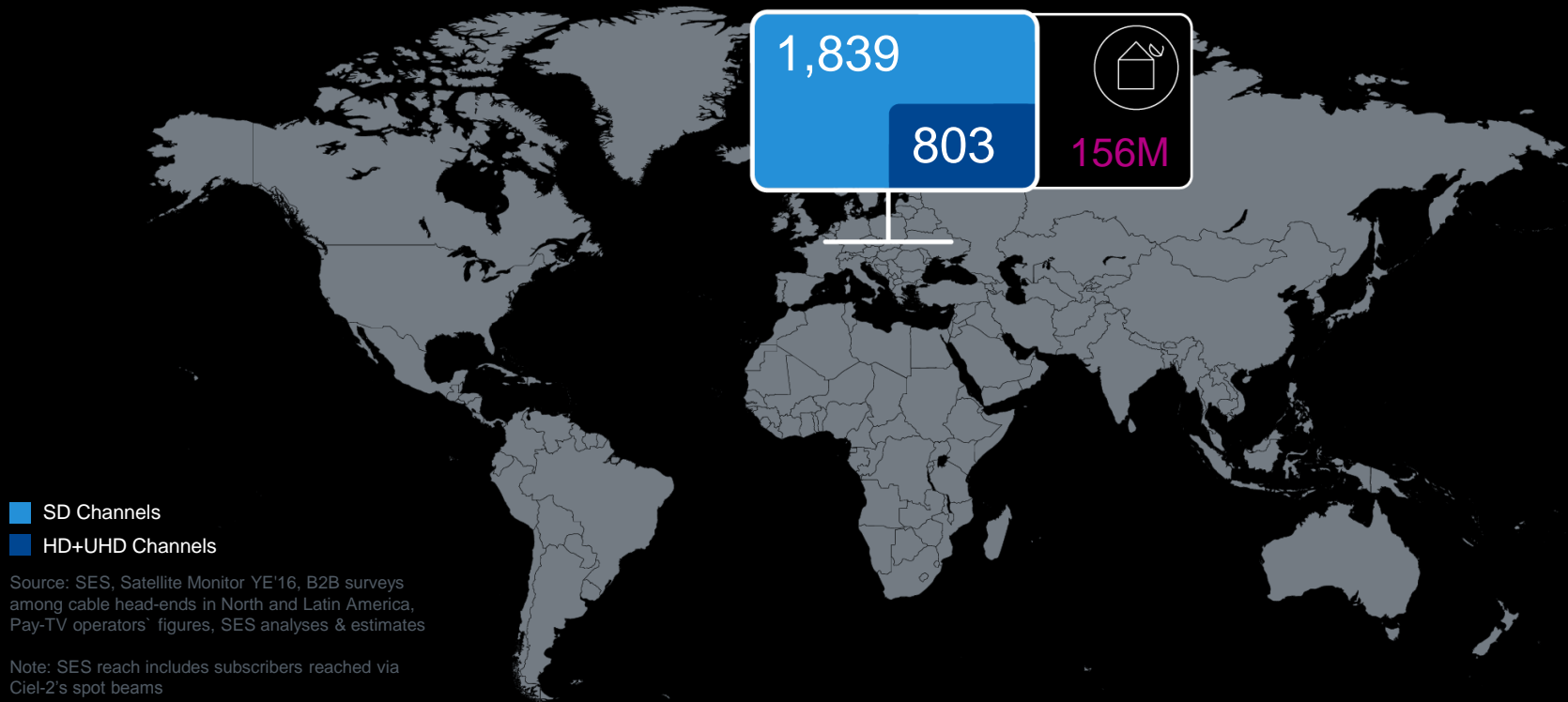


31 channels broadcasted
21 commercial

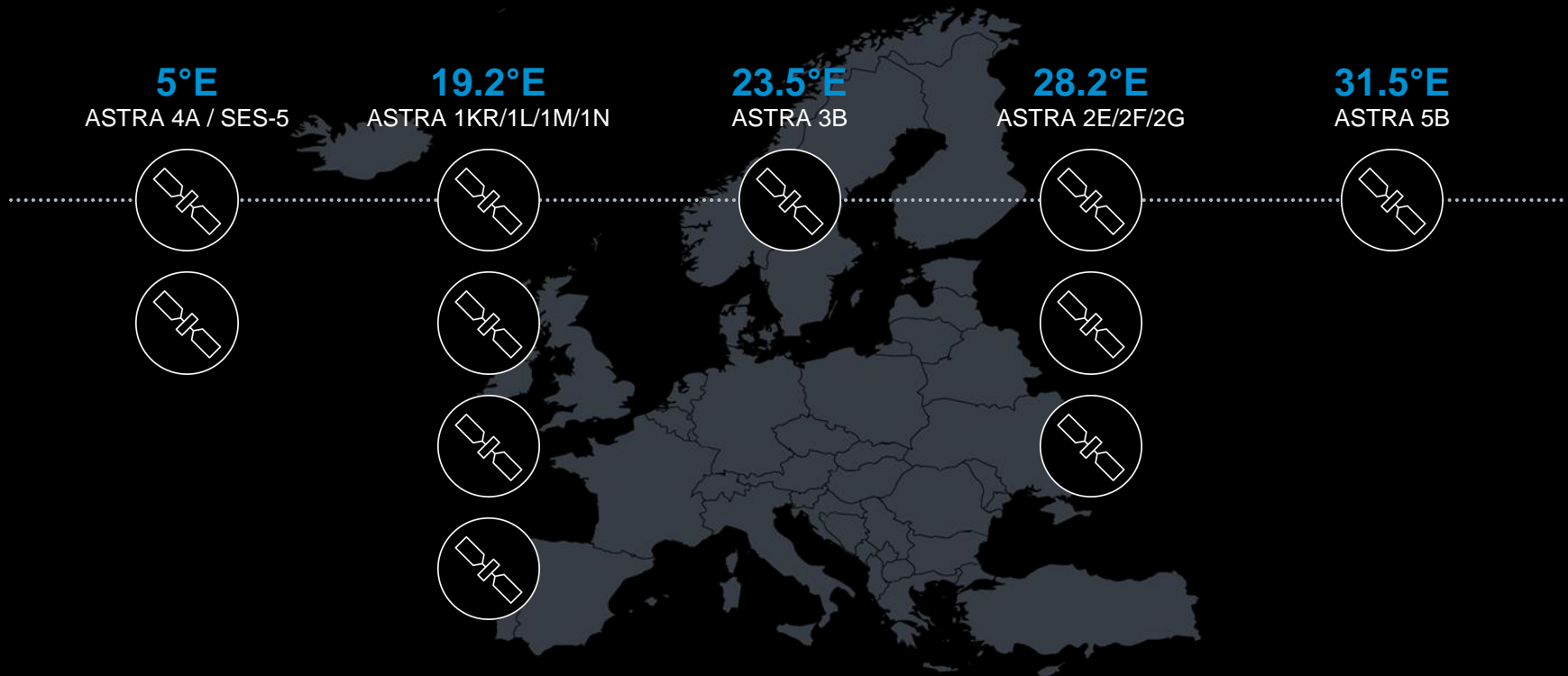
SES Video Serves 325 million TV Homes Worldwide



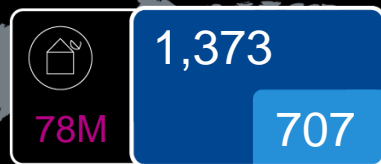
SES Video Serves 156 million TV Homes in Europe...



... via Five Prime Video Positions



SES Video Serves 78 million TV Homes in North America...

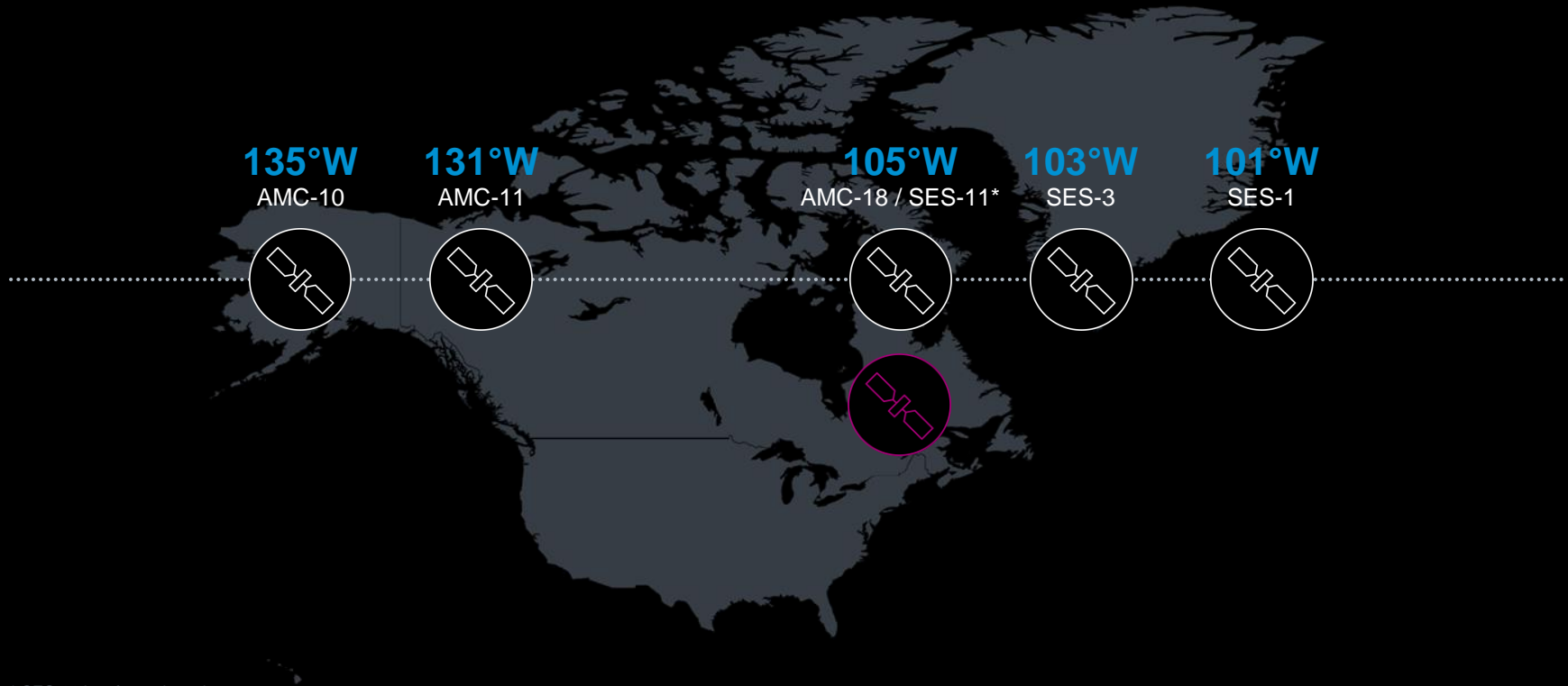


- SD Channels
- HD+UHD Channels

Source: SES, Satellite Monitor YE'16, B2B surveys among cable head-ends in North and Latin America, Pay-TV operators' figures, SES analyses & estimates

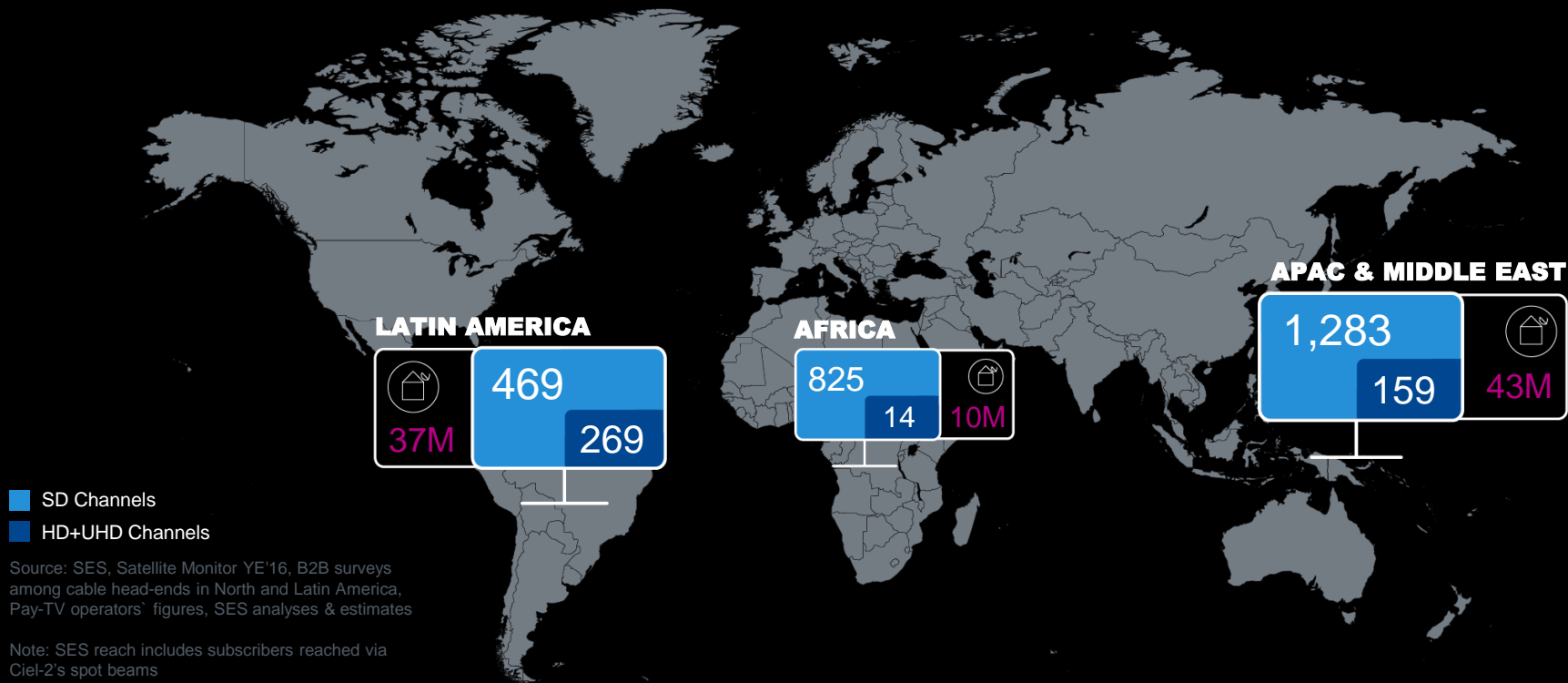
Note: SES reach includes subscribers reached via Ciel-2's spot beams

... via Two Key Video Neighbourhoods

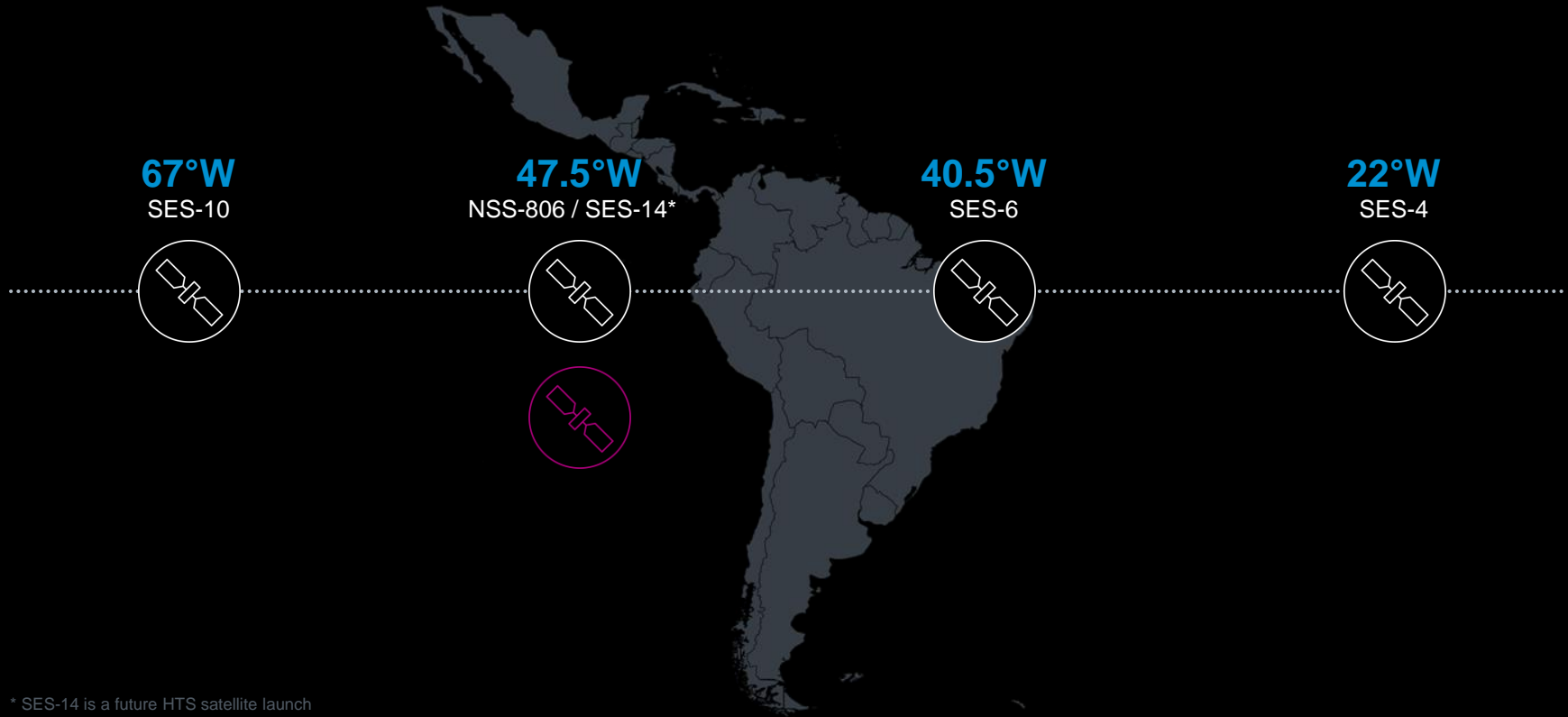


* SES-11 is a future launch

SES Video Serves over 90 million TV Homes in Developing Markets...



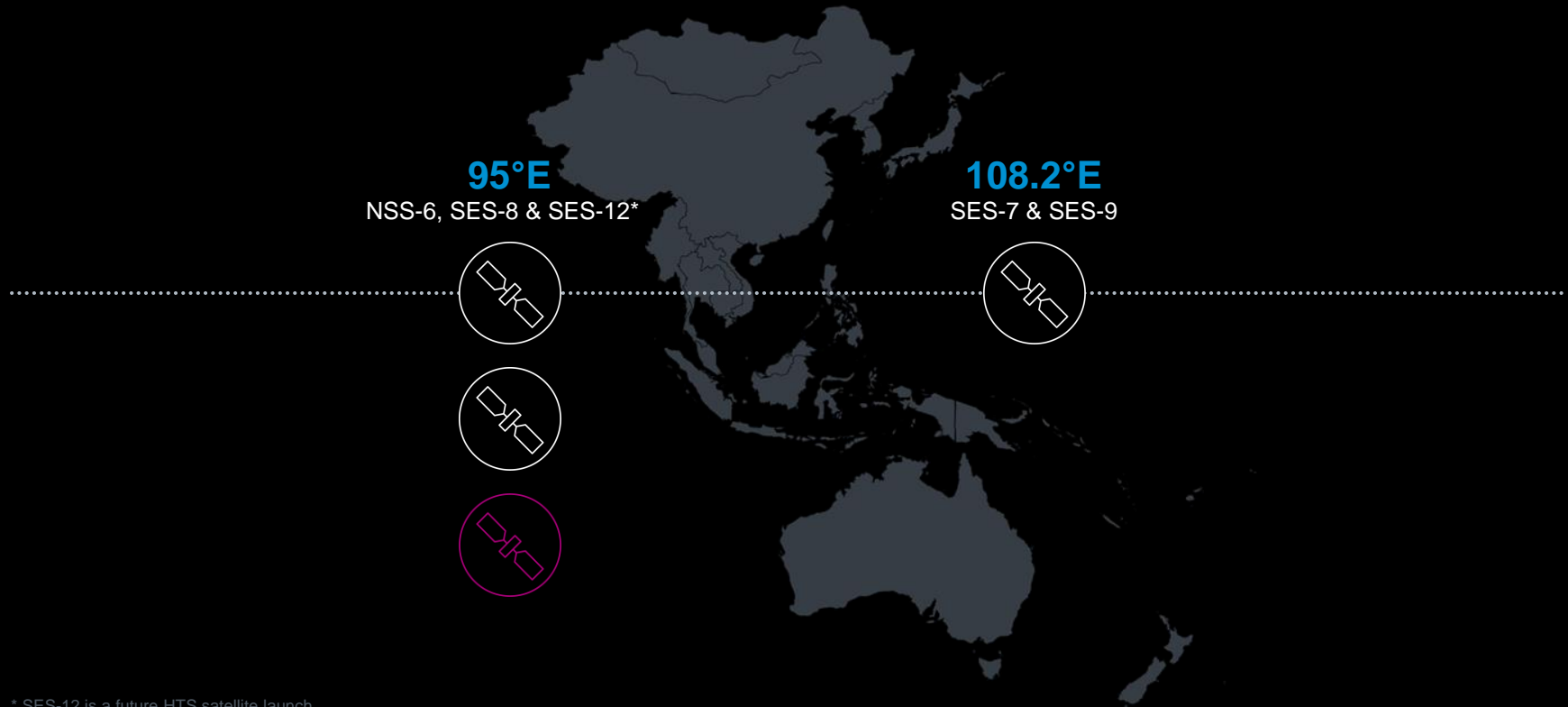
... via Four Key Video Positions in Latin America



... via Four Key Video Positions in Africa

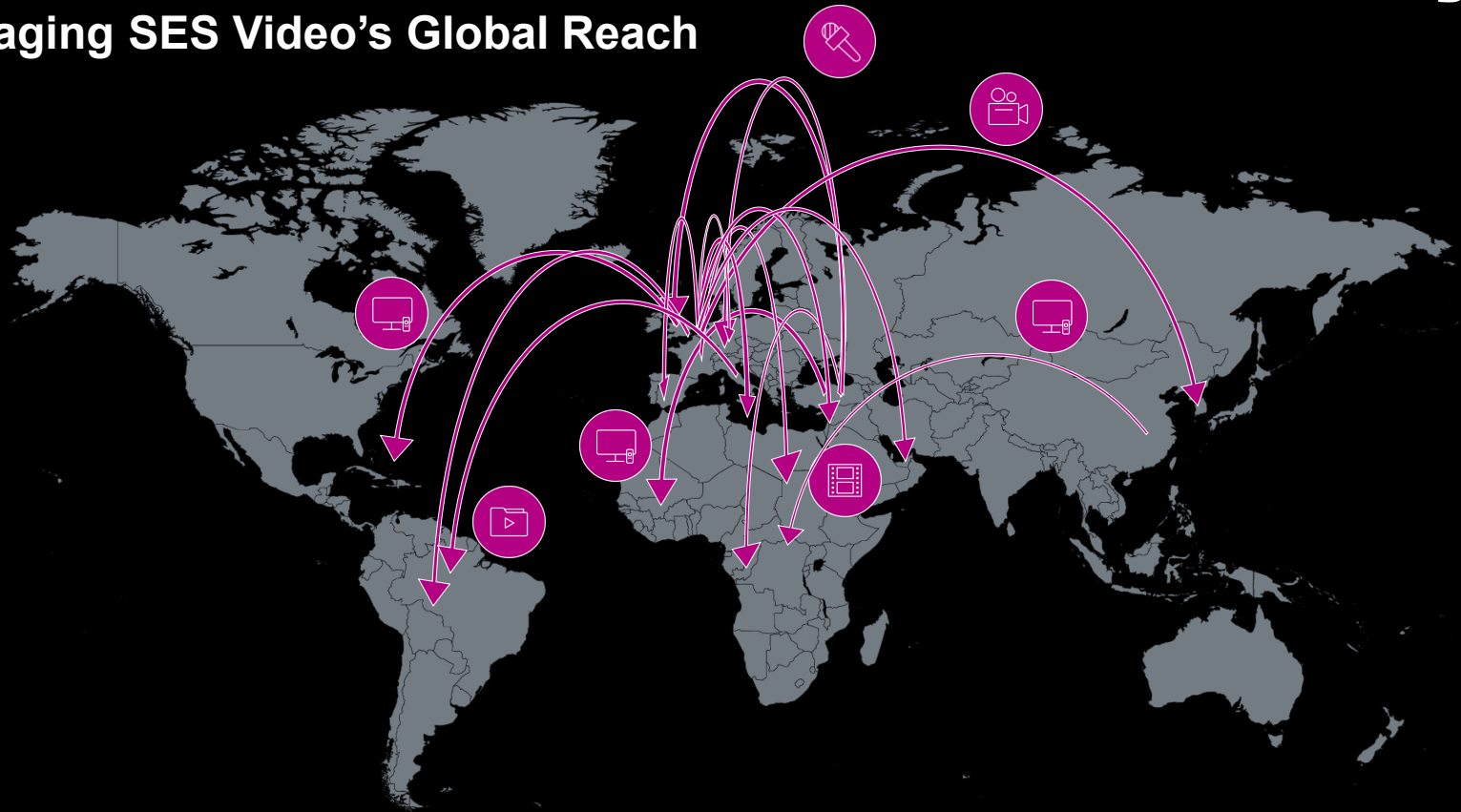


... via Two Key Video Positions in Asia-Pacific

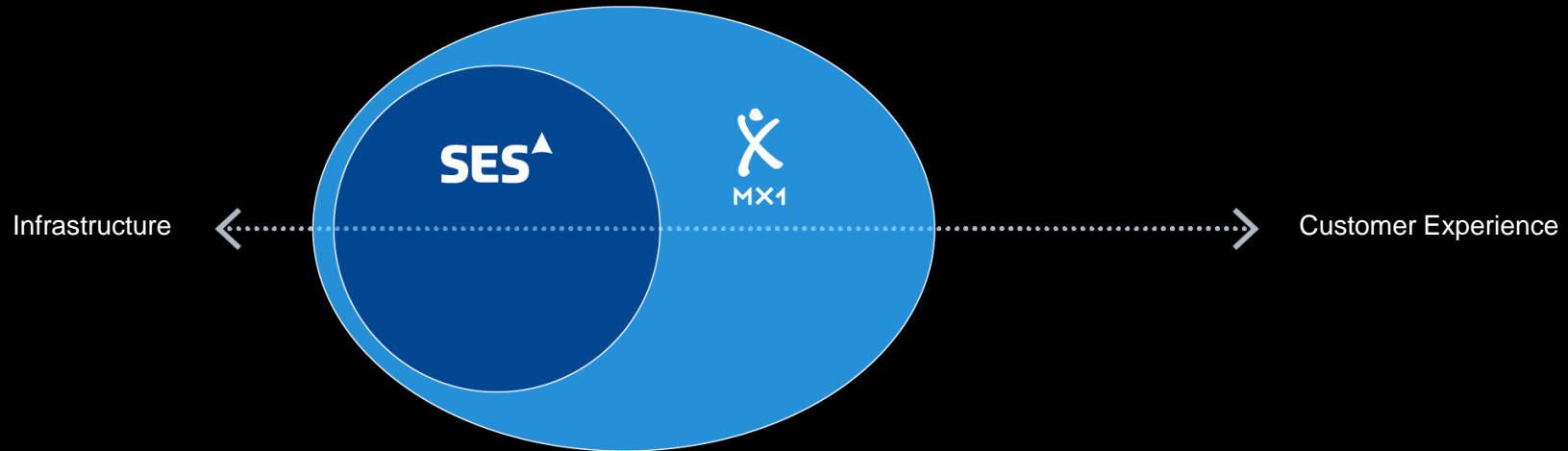


* SES-12 is a future HTS satellite launch

Leveraging SES Video's Global Reach

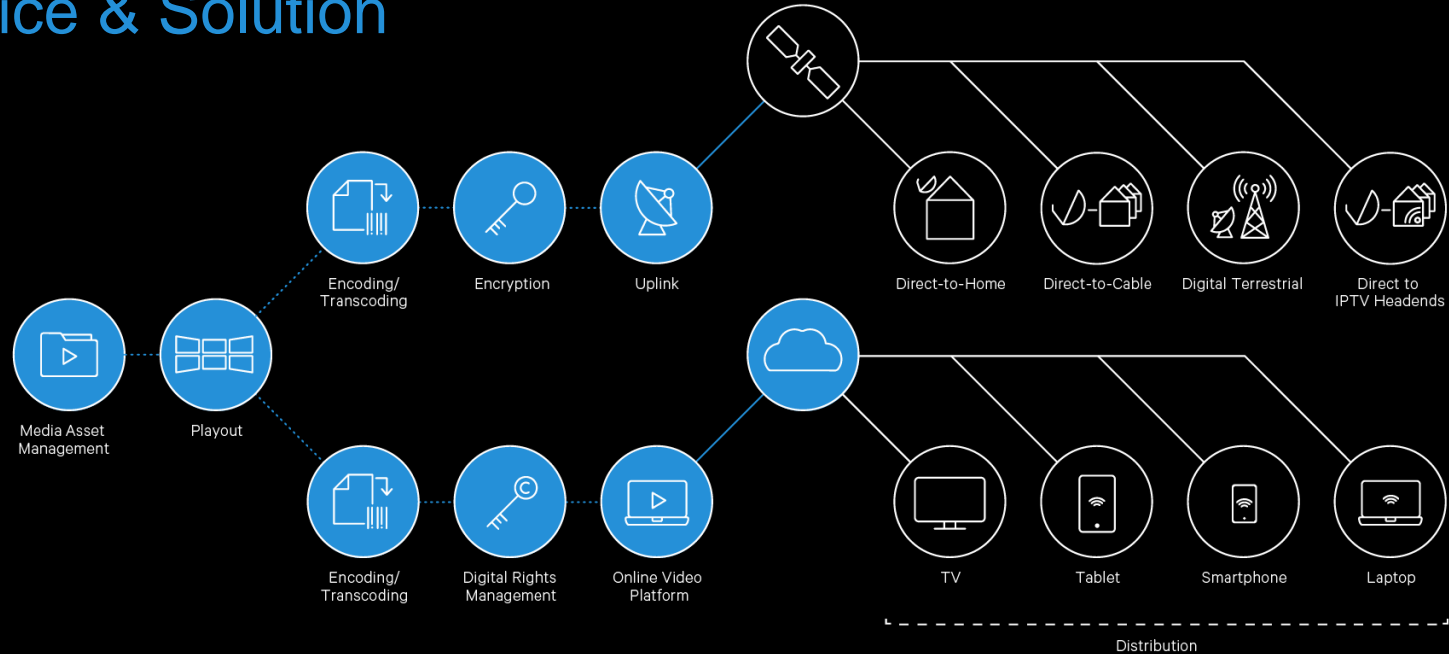


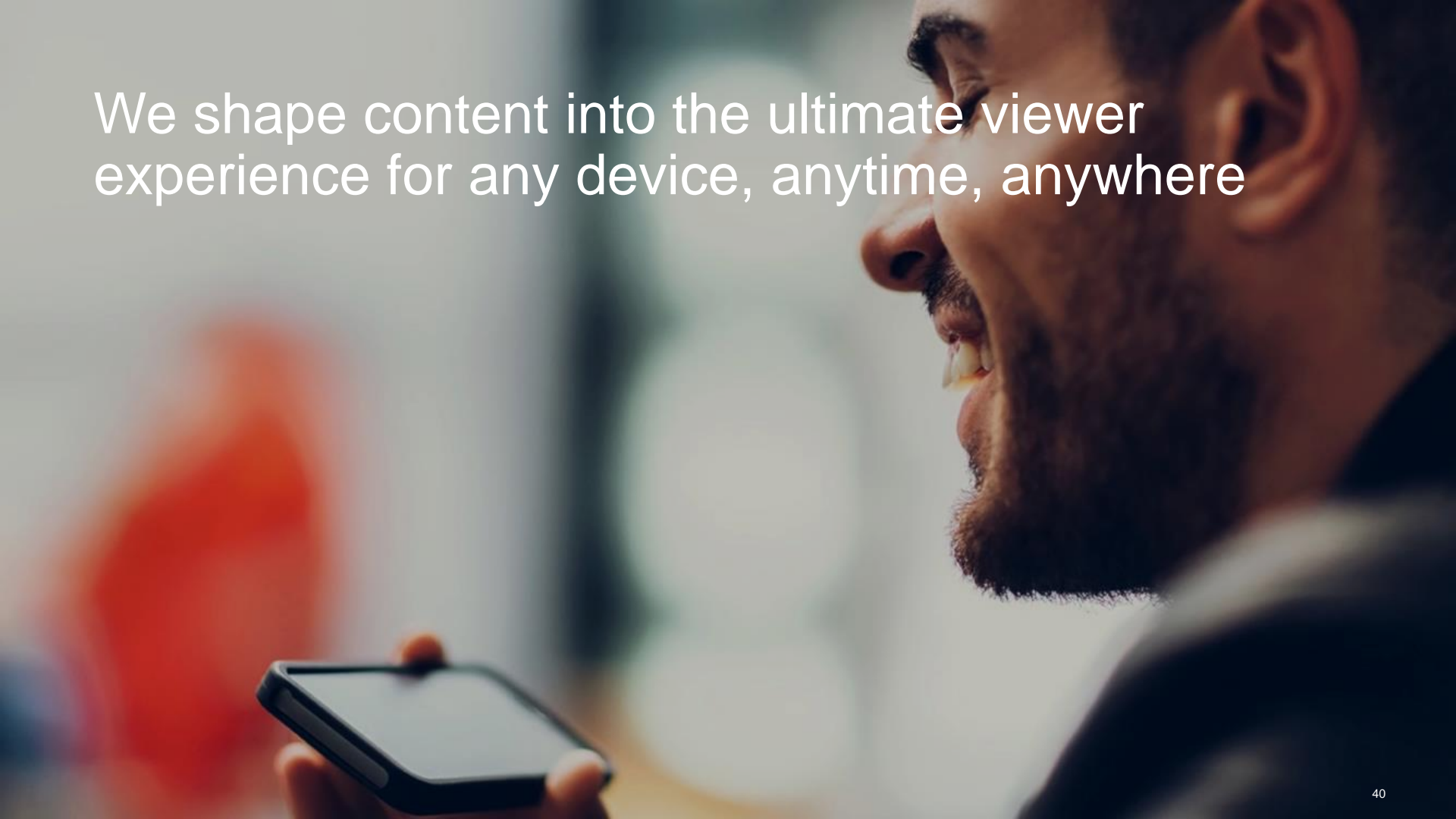
SES Video: Service & Solution provided by MX1



Serving the Evolving Needs of our Customers

Service & Solution



A close-up, profile view of a man with a dark beard and mustache, looking down at a black smartphone held in his hand. The background is blurred, showing a red object on the left and a white object in the center. The text "We shape content into the ultimate viewer experience for any device, anytime, anywhere" is overlaid in white on the upper left portion of the image.

We shape content into the ultimate viewer
experience for any device, anytime, anywhere

Experience more

With more premium sports, channels & content, more of the best action, the best entertainment & the best collections, we offer more choice, more quality & more global reach to our customers.

Every day MX1:

Distributes

2,750+
TV channels

Manages
playout of

500+
channels

Syndicates
content to

120 VOD
platforms

Delivers

8,000+
hours
of streaming video

Delivers

500+
hours
of premium sports
& live events

Worldwide: ~600 Employees | 16 Offices | 6 Media Centres



Content owners

Broadcasters/TV channels

Rights holders

Sports organisations

Online content creators

TV service providers/
distributors

Content aggregators



MX1

Optimised content management
& distribution solutions to any
screen anywhere

Powerful value-added services

Innovative monetisation
opportunities

Robust global networks

Proven cloud technologies



Platforms

Cable/Satellite TV

Free to air

IPTV

Online video platforms

Mobile operators

Social media platforms

Some of MX1's clients...

- Broadcasters, TV channels & TV service providers
- Sports clubs, federations, rights holders & organisations
- Content aggregators, owners, rights holders, telcos & new media platforms



Delivering Scalable Linear/Non-linear End-to-end Solutions

- MX1 360 - MX1's innovative end-to-end media service platform
- Enables leading media businesses to manage, deliver & monetise content
- Full transparency & total control
- All MX1 services are enabled through MX1 360

MX1 360



Content
aggregation



Advanced
content
management



Channel
playout



VOD/Online
video services



Content
distribution
(Sat/Fibre/IP)

Combining MX1 services & SES reach to deliver the best viewing experience across all devices



Together, we leverage our combined wealth of experience and expertise to offer the ultimate in viewer experience, global reach and speed to market.

Additional success stories



MX1 aggregates, processes & delivers premium content via IP

- Content acquisition, processing & delivery to Amazon Prime
- Consists of multiple channels being delivered, some of which are also played out of MX1's Media Centres
- Live delivery of NFL Thursday night games to Amazon Prime with local advertising capability



MX1 processes & enables content localization for premium content monetisation

- MX1 360 platform to view, monitor and deliver premium content
- Secure archiving and compliance
- Content packaging and delivery to premium platforms

Summary

Combined

We leverage our combined wealth of experience & expertise of MX1 & SES

Experience

We shape content into the ultimate viewer experience

Anywhere

We reach the widest possible audience on any device

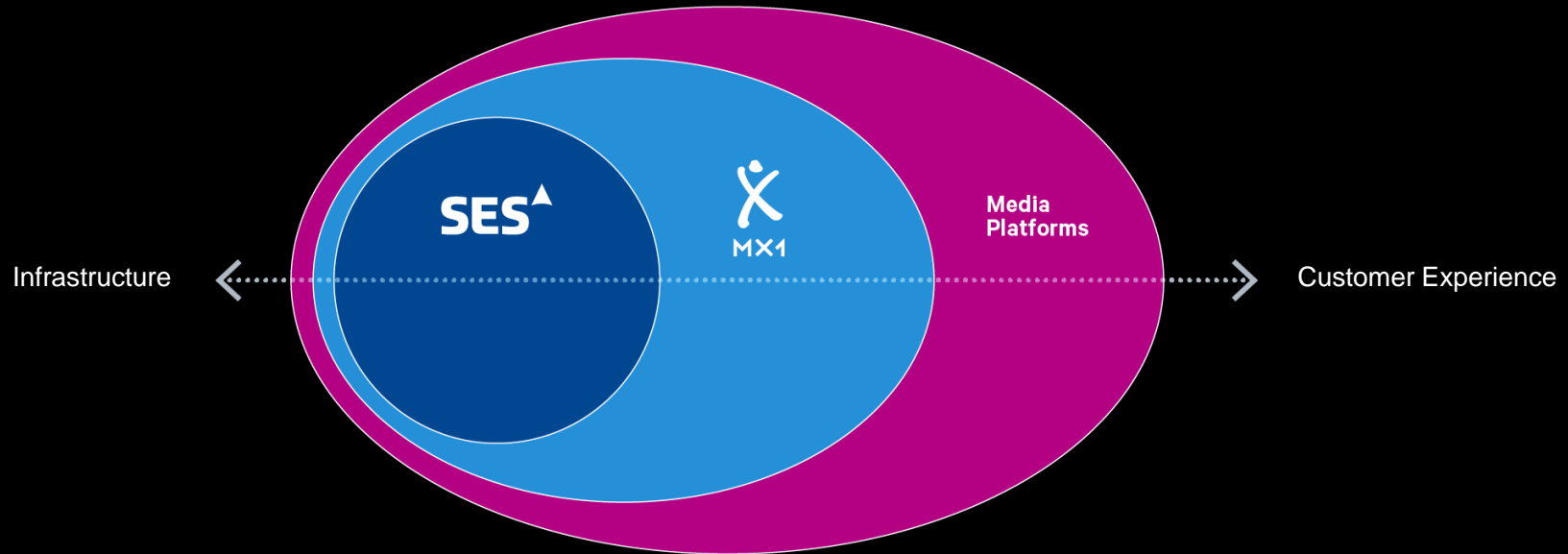
Scalable

We offer end-to-end media solutions via the innovative MX1 360 service platform

Know-how

We manage & deliver media solutions for the world's media organisations

SES Video: Customised Media Platforms



HD+: Introducing HD to Germany

2009

Launch of HD+

2013

1m+ subscribers

2016

2m+ subscribers



HD+: Extending Pay-TV Offer with Exclusive Sports Content

HD+ delivering a
'Eurosport package' offer

- Access to new sports channel Eurosport 2HD Xtra
- Eurosport Player on any device

★EUROSPORT 2^{HD}_{XTRA}

★EUROSPORT **PLAYER**

HD+ exclusive
entertainment

HD+ subscribers
able to enjoy
exclusive live
football matches
and other sports





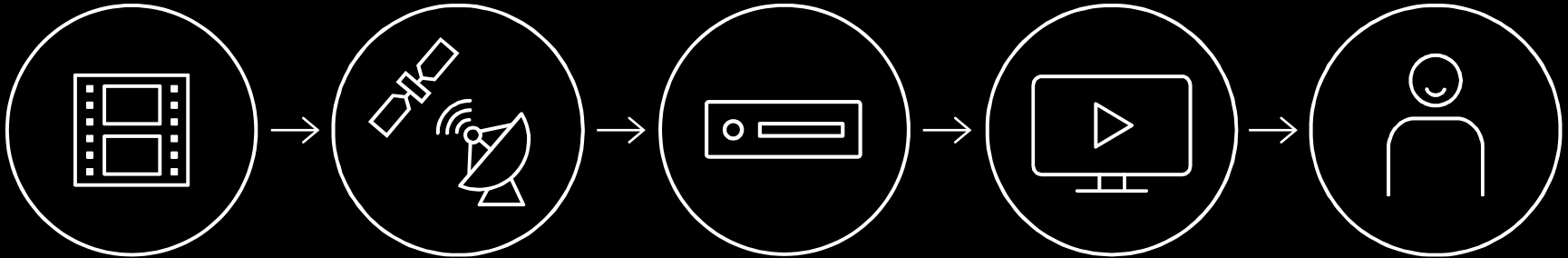
BRINGING VOD SERVICES ANYWHERE IN THE WORLD

Serving Everyone with VoD Everywhere



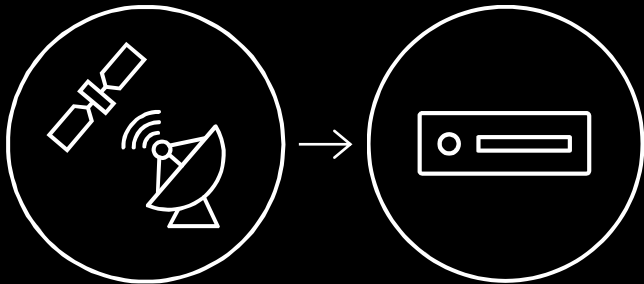
Serving Everyone with VoD Everywhere

Delivering VoD offerings to underserved and unserved areas with limited broadband connectivity with more capabilities at cost-efficient prices



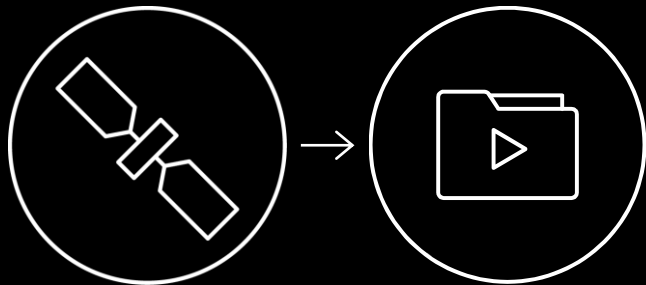
Serving Everyone with VoD Everywhere

FAST DOWNLOAD OF THE INITIAL LIBRARY



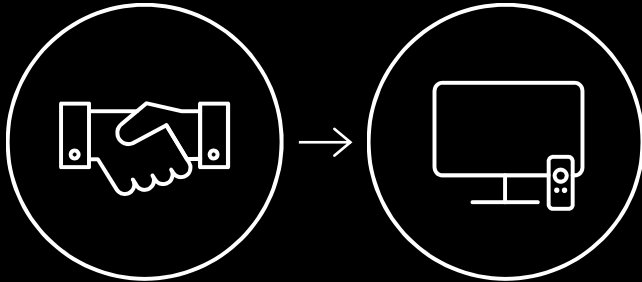
Serving Everyone with VoD Everywhere

EFFICIENT DAILY UPDATES VIA SATELLITE



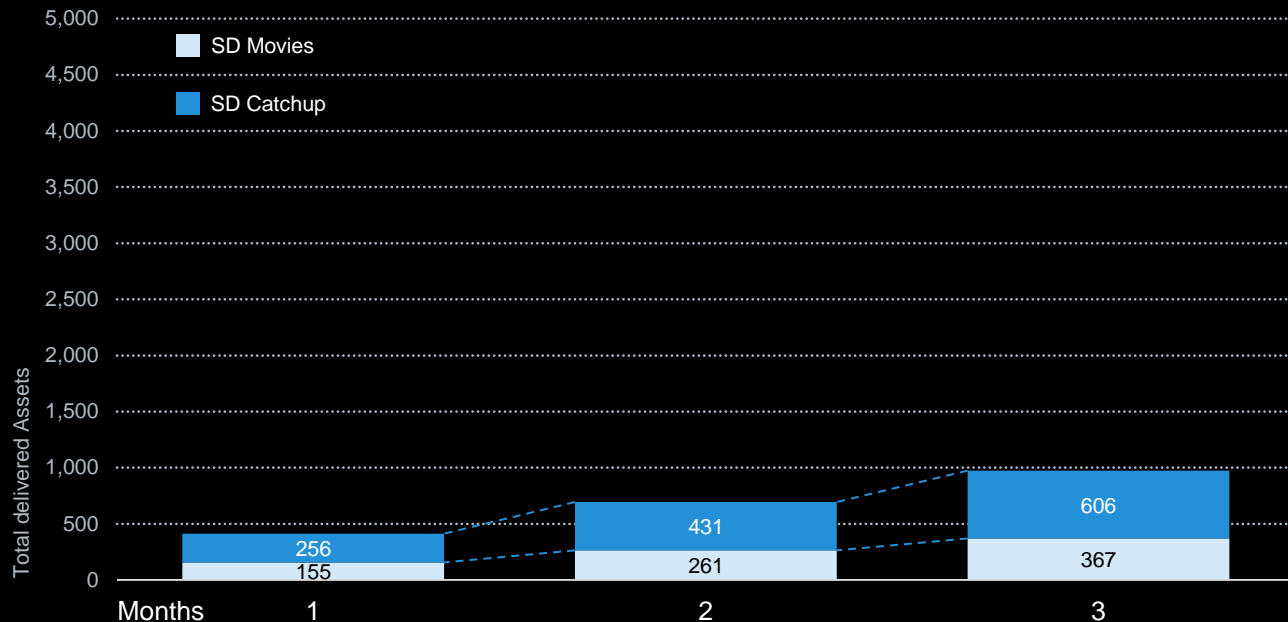
Serving Everyone with VoD Everywhere

SUPPORTING INDIVIDUAL BUSINESS RULES



VoD Everywhere: Programme your video lineup

Library size assumption: 64 GB stores 49 Movies, 81 Catchup



Library Refresh

10 Mbit/s

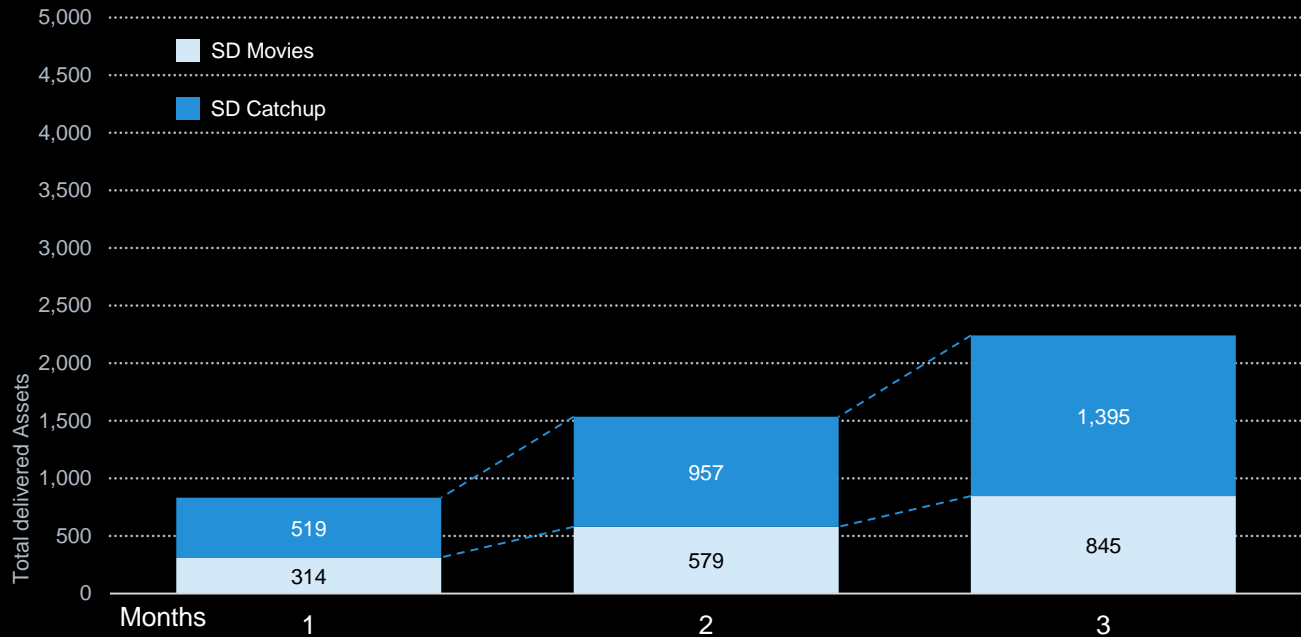
Daily 60min update:

+3 Movies

+6 Catchup

VoD Everywhere: Programme your video lineup

Library size assumption: 64 GB stores 49 Movies, 81 Catchup



Library Refresh

25 Mbit/s

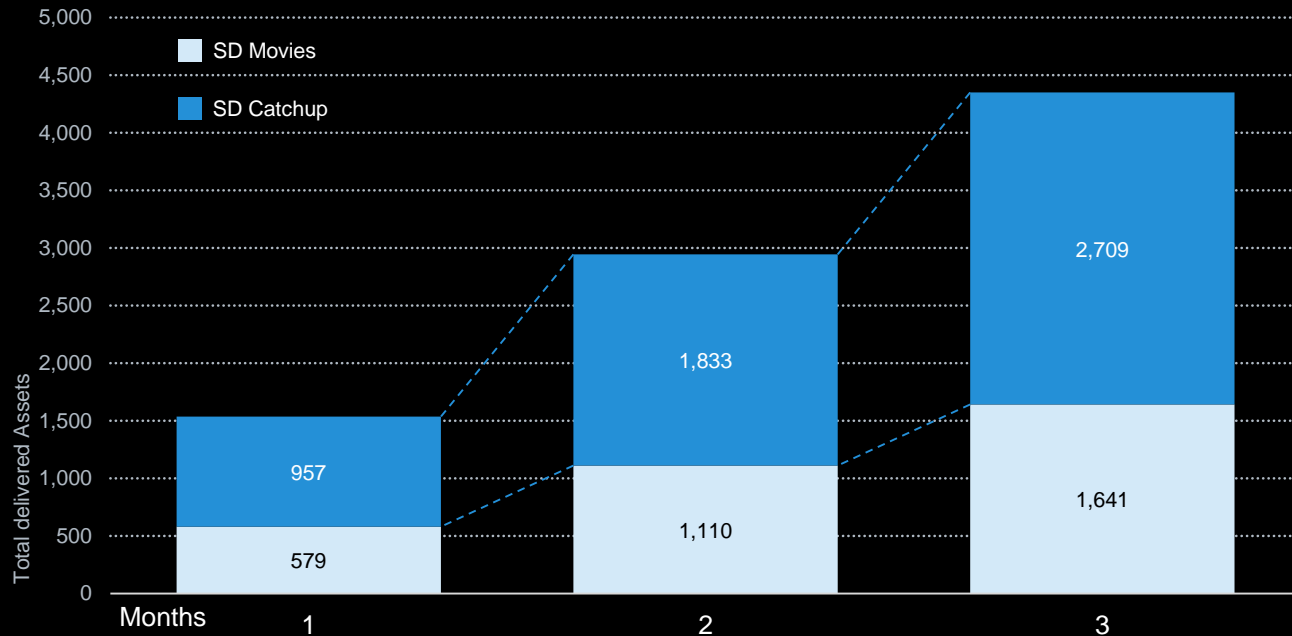
Daily 60min update:

+9 Movies

+15 Catchup

VoD Everywhere: Programme your video lineup

Library size assumption: 64 GB stores 49 Movies, 81 Catchup



Library Refresh

50 Mbit/s

Daily 60min update:

+18 Movies

+30 Catchup

BEYOND TRADITIONAL TV



Beyond Traditional TV with SES Online Video Platform



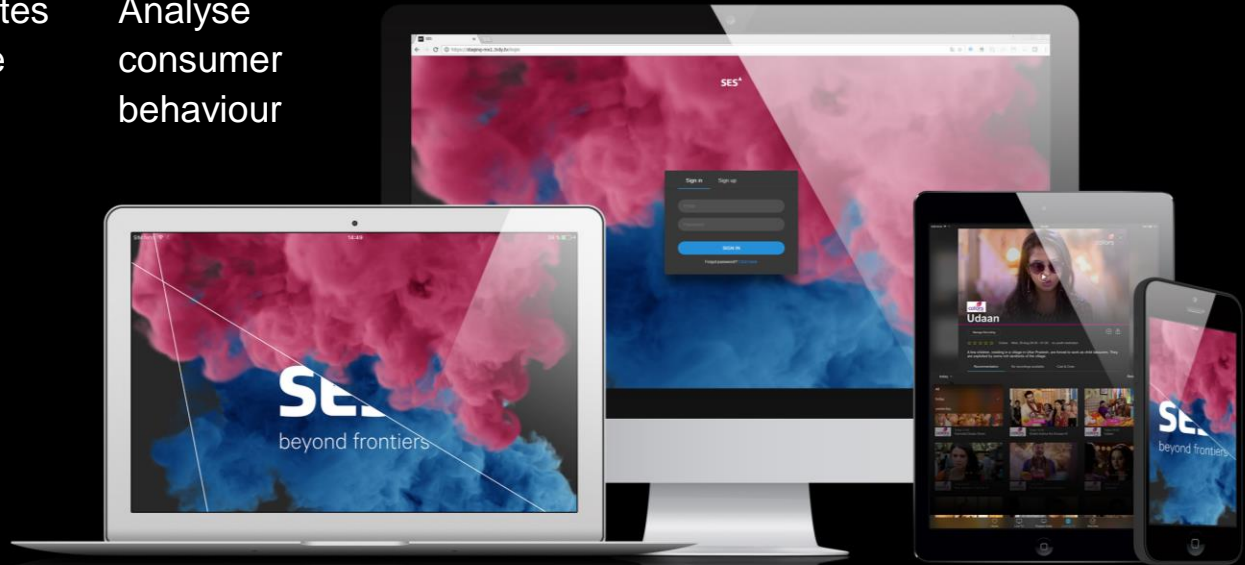
Enter the
Online Video
space in
shortest
time-to-market



Push updates
in real-time



Analyse
consumer
behaviour

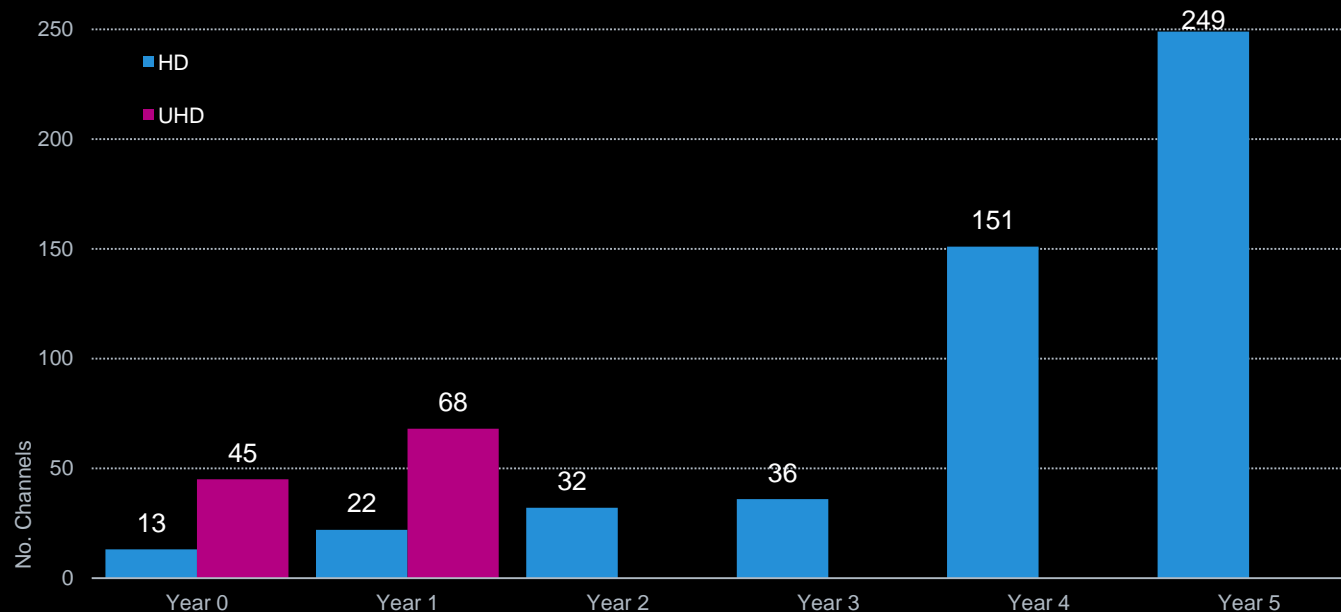


Beyond Traditional TV with SES Online Video Platform



Identifying New Ecosystem: UHD

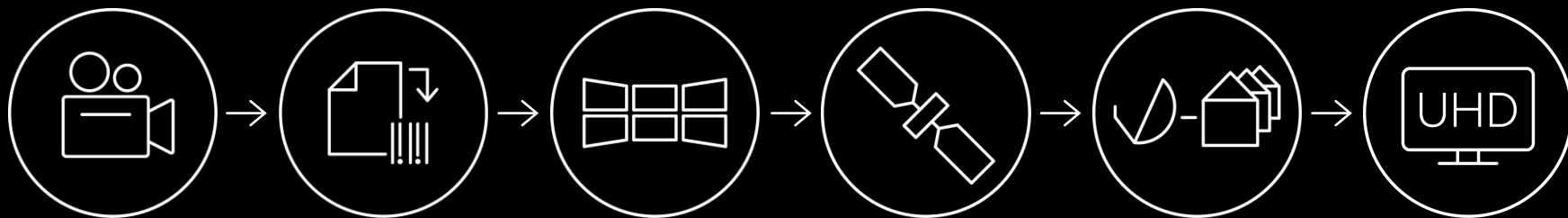
UHD channel growth is outpacing HD channel growth



40%

Growth of
UHD channels
in one year

WORLD'S FIRST ULTRA HD DISTRIBUTION SOLUTION FOR CABLE SYSTEMS



WORLD'S LARGEST LINEAR UHD BOUQUET WITH 10 CHANNELS



OVER 30 PAY-TV PROVIDERS TESTING ULTRA HD PLATFORM

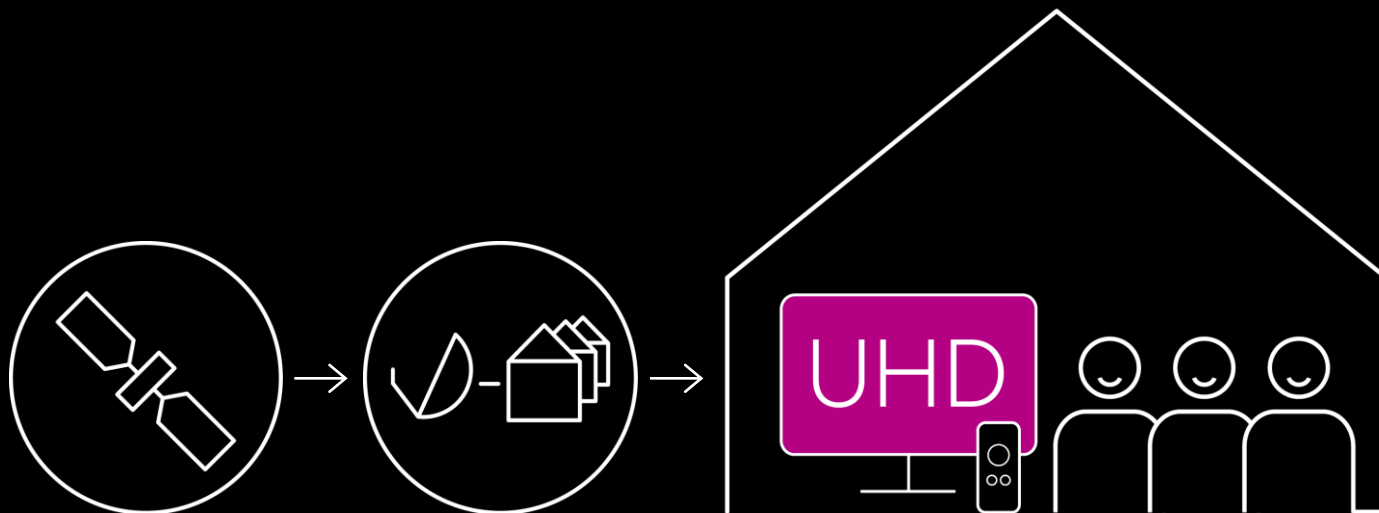
30+

Including

verizon[✓]

Frontier[™]
COMMUNICATIONS

3 PAY-TV OPERATORS HAVE LAUNCHED FIRST COMMERCIAL ULTRA HD PACKAGE





GHANA MEDIA PLATFORM

READY TO OFFER MORE, MORE, MORE

More
customised
infrastructure

More
tailored
solutions

More
customer-centric
innovation

THANK YOU

