EUTELSAT IN THE BROADCAST SERVICES

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EUTELSAT IN THE VIDEO MARKET

- > 120 million (satellite) DTH homes served from 6 premium video neighbourhood
- … in addition to + 80 M cables homes viewing Eutelsat carried TV channels
- > 500 HD channels
- > 5000 TV Channels
  - 2860 encrypted
  - 1800 free to air channels
- > 500 HD channels
- Market leader in Europe, Russia, Middle East and Africa
- 40 premium TV platforms
- Worldwide coverage
- Experience in building DTH hotspots
- Pioneer in Ultra HD broadcasting
- Innovator in full-satellite triple-play solutions
EUTELSAT OFFERS A SUPERIOR WORLDWIDE COVERAGE FOR DTH

Leading position in Sub Saharan Africa with 3 hotspots

Leading position in Europe

Leading position in Russia and Ukraine, with biggest hotspot

Future Hotspot in Asia Pacific

On going development in the Americas with the acquisition of Satmex and further rollout of Alterna TV platform

Leading position in Middle East North Africa with capacity on all the Hotspots of the region (shared with other actors)
Broadcasting over 40 anchor pay-TV platforms in mature and emerging markets in Europe, Middle East, Africa

Satellite TV platforms complementing DTT networks

HD acceleration: forecast by 2020 to represent 20% of satellite TV channels worldwide

New satellites designed for dynamically-expanding markets including Russia, Africa, Latin America

A key partner of market-leading pay-TV platforms

* Source: Euroconsult
HOTBIRD AT 13° EAST
FOR EUROPE, NORTH AFRICA AND THE MIDDLE EAST

Household reach in Europe and MENA via HOTBIRD:
More than 120 million homes in Europe and
more than 27 million homes in MENA
KEY PLATFORMS VIA EUTELSAT 13°EAST

Pay TV Platforms (8)

- **SKY Italia**
  - 4,760’ subs

- **Cyfrowy Polsat**
  - 3,535’ subs

- **nc+**
  - 2,200’ subs

- **BiS Television**
  - 100’ subs

- **orange France**
  - 500’ subs

- **orange Poland**
  - 856’ subs

- **NOVA Greece**
  - 354’ subs

- **NOVA Cyprus**
  - 4’ subs

Digital Terrestrial Television (DTT) platforms (1)

- **tivùsat**
  - 2,000’ subs

Free Satellite Package (1)

- **SRG SSR**
  - 530’ subs*

*Access requires a card Sat Access

Sources: Dataxis Q3 2013, Eutelsat Commercial Department, Operators published figures (Poland and Italy)
VIDEO NEIGHBOURHOODS SERVING HIGH-GROWTH MARKETS

- The HOT BIRD position:
  > Eutelsat’s leading video neighbourhood
  > Broadcasting over 1,000 channels

- Successful model replicated in other dynamic broadcast markets

1,084 CHANNLES 13° EAST

Replicating successful HOT BIRD model

Europe, Mediterranean Basin

809 CHANNELS 7°/8° WEST

+22.2%
North Africa
Middle East

780 CHANNELS 16° EAST

+17.1%
Africa
Central Europe
Indian Ocean Islands

835 CHANNELS 36° EAST

+9.7%
Russia
Africa

Channel growth from June, 30 2013 to June, 30 2014
FOCUS ON POLAND: KEY FINDINGS

• 14.5 mil TVHHs (98% of the population)

• **Satellite reaches 46% or 6.8 mil TV households**, or one in two TVHHs, & keeps growing despite maturity

• Hot Bird™ signal received by 6.7 mil TVHHs

• **Eutelsat is the market leader with 92% market share** of satellite TV reception

*Source: Eutelsat TV Observatory 2012*
Ultra High Definition TV (Ultra HDTV) will offer (*)

- Higher resolution
- Higher frame rate(s)
- More colours
- Higher Dynamic Range (HDR)
- Immersive audio

(*) With respect to High Definition
FOCUS ON ULTRA HDTV: EVOLUTION

- SD 576i (720 x 576)
- HD 720p (1280 x 720)
- HD 1080i or p (1920 x 1080) = 2.1 Mpixels
- 2k Cinema (2048 x 1080)
- UHDTV1 (4k TV) & Quad HD (3840 x 2160 p) = 8.3 Mpixels
- 4k TV : 3840 pixels / line
- 4k cinema: 4096 pixels / line
- 4k Cinema (4096 x 2160)
- UHDTV2 (8k TV) or Super Hi-Vision (7680 x 4320 p) = 33.2 Mpixels
- 2160 lines
FOCUS ON ULTRA HDTV: EUTELSAT DEMONSTRATION CHANNELS

1st channel launched on 8 January 2013: Quad HD MPEG-4
- Transmitted via Eutelsat 10A (10° East)
- Technical solution set up with ATEME
  - 4 Full HD streams (1920 x 1080p 50 fps) + 1 Audio (stereo now)
  - MPEG-4 encoding: 4 video streams of 10.28 Mbit/s (50 fps)
- Modulation: DVB-S2 8PSK

2nd channel launched for IBC 2013: HEVC at 30 fps

Channel in cooperation with Samsung launched for IFA 2013 (10° East) – (Quad HD MPEG-4)

HEVC 50 fps demo channel launched on 26th May 2014
- HEVC encoding
- 50 fps
- 10-bit colour depth (1 billion colours)
- On HOT BIRD: premium DTH position over Extended Europe
ULTRA HD (4KTV) OUTSIDE EUROPE BETWEEN NOW AND 2016

KOREA:

- South Korean DTH operator KT SkyLife and Japanese Sky PerfecTV! have launched first UltraHD channels in June 2014
- KT SkyLife is broadcasting 4 hours of UltraHD content per day and is planning to have 2 full UltraHD channels by beginning of 2015

JAPAN:

- NexTV via Sky Perfect JSAT broadcasts 6 hours of Ultra HD content per day
- Sky Perfect plans to open an Ultra HD commercial channel in 2015
- Three 4k TV channels planned in Japan in 2016

USA:

- Major US player DirecTV announced UHD VoD for end 2014
<table>
<thead>
<tr>
<th>Region</th>
<th>Longitude</th>
<th>Homes</th>
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<tbody>
<tr>
<td>Europe</td>
<td>13° East</td>
<td>120 million</td>
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<tr>
<td>Middle East &amp; North Africa</td>
<td>7/8° West</td>
<td>51 million</td>
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<td>16° East</td>
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<td>Russia</td>
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<tr>
<td>Sub Saharan Africa</td>
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<td>2.5 million</td>
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<td>North and Latin America</td>
<td>113° West &amp; 117° West</td>
<td>More than 110 million cable homes</td>
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