

Mobile Media and the Role of Satellites
 Rob Bednarek, EVP Corporate Development, SES GLOBAL
 Brussels – November 7, 2005 (v2)



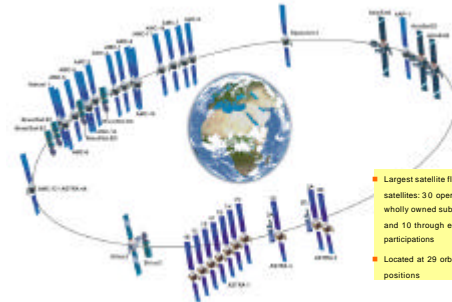
Your Satellite Connection to the World

SES GLOBAL: Who Are We?

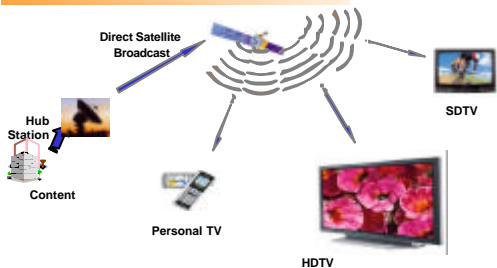


- ▲ The world's leading satellite operator by revenues, EBITDA and size of fleet
- ▲ Born out of the combination of SES ASTRA and SES AMERICOM
 - ASTRA: No.1 DTH broadcast satellite system in Europe with a reach of more than 41 million households (103 million incl. cable)
 - AMERICOM: Leading position in US cable head-end broadcasting serving over 10,000 head ends with reach of approximately 80 million cable households
- ▲ Strong network of established partners in Asia and Latin America
- ▲ Global fleet of 40 satellites with optimal look angles and comprehensive landmass coverage

The SES GLOBAL fleet



Media Going Mobile – Market Trends



HDTV and Mobile Media key drivers in media broadcasting, for both satellite and terrestrial

Mobile Devices and Services are Evolving from Voice to Video

SMS

- ▲ From text to pictures
- ▲ From voice only to voice & video peer-to-peer

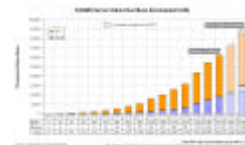
MMS

From Pull to Broadcasting

- ▶ **Push offering**
 Mobile phone operators and service providers can be enabled to provide services.
- ▶ **Pull offering**
 Pre-registered users can be targeted at the service.

Mobile Media – Encouraging First Results for Subscription Content

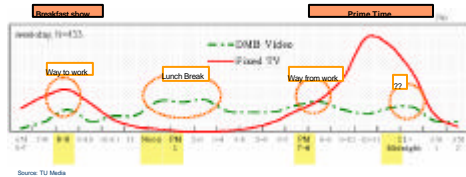
- ▲ Subscription-based mobile broadcasting experiencing strong demand
 - Satellite radio in the US ("DARS")
 - XM Radio and Sirius Radio
 - Satellite-delivered mobile video in Korea / Japan ("S-DMB")
 - TU Media / MBCO
- ▲ 3G commercial services across Europe, eg
 - Orange, Vodafone, Sky- UK
 - Orange, SFR, Canal+ – France
 - Vodafone, RTL, Sat1 – Germany
- ▲ Broadcast network trials and announced deployments (DVB-H, T-DMB, MediaFLO, etc)
 - UK, France, Germany, etc
 - USA – Crown Castle, MediaFLO



Preliminary results indicate consumer's willingness to pay for quality mobile broadcast content and services

S-Band: 2.630 - 2.655 GHz (DVB-H)
 M-Band: 13.824 - 13.830 GHz
 W-Band: 12.214 - 12.227 GHz

Mobile Media Complements Fixed Media Consumption



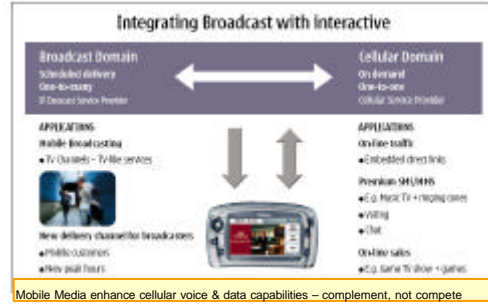
Mobile TV viewing complements traditional TV usage without necessarily impacting traditional television viewing time. Interesting opportunities for content providers and broadcasters to "follow their customers"

7- STRICTLY CONFIDENTIAL

SES GLOBAL

Source: TU Media, Korea

Mobile Media Complements Mobile Voice & Data Communications



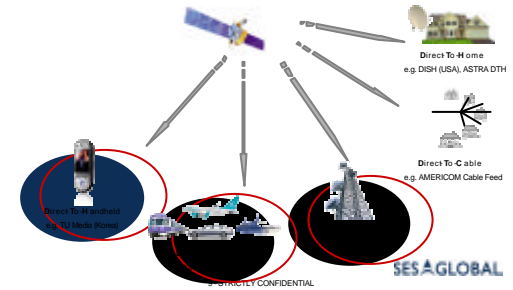
8- STRICTLY CONFIDENTIAL

SES GLOBAL

Graphics: Nokia

Mobile Media – Opportunities for Satellites

Satellites are uniquely qualified for broadcasting content: ubiquitous & instantaneous coverage, spectrum, synergies with DTH/DBS services



SES GLOBAL

Conclusions

- ▲ Subscription-based mobile media emerging -> new revenue opportunities for content providers, broadcasters and cellular operators
 - Existing (reformatted) as well as dedicated (exclusive to mobile) content
- ▲ Mobile media complementary to voice & data
- ▲ Satellites can provide ubiquitous, instantaneous coverage in dedicated spectrum, offering cost-effective business opportunities for
 - Feeding head-ends
 - Aggregating content
 - Direct-to-handheld solutions
- ▲ Network and service deployments suffering from fragmentation
 - Multitude of technologies, lack of spectrum, regulations
- ▲ Technology-neutral policies should permit direct-to-handheld satellite solutions
 - Considering in particular the complementary nature of broadcasting and communications

10- STRICTLY CONFIDENTIAL

SES GLOBAL

SES GLOBAL

THANK YOU FOR YOUR ATTENTION

Mobile Media and the Role of Satellites

www.ses-global.com



Your Satellite Connection to the World