Welcome to Net Insight’s Capital market Day

November 22 2016
Agenda

9.10 This is Net Insight
Fredrik Tumegård, CEO

9.45 Net Insight Technology and Offering
Martin Karlsson, CTO and VP Product Portfolio

10.15 Business and Financial Position
Thomas Bergström, CFO

10.35 BREAK

10.50 Live OTT
Per Lindgren SVP Live OTT

11.20 Tata Communications
Brian Morris VP and GM

11.50 Demonstration
Global Media & Entertainment Services

Customer Provisioned Network
Alexander Sandström Strategic Product Manager

Live OTT
Filippa Hasselström, Product Management and Strategic Alliances

12.30 ENDING
Net Insight
Shaping the future of media
Fredrik Tumegård
Net Insight covers the TV production chain from camera to content owner to consumer.
<table>
<thead>
<tr>
<th><strong>Net Insight in figures</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>481</strong></td>
</tr>
<tr>
<td>SEK Million</td>
</tr>
<tr>
<td>Total turnover Q3'16</td>
</tr>
<tr>
<td><strong>40%</strong></td>
</tr>
<tr>
<td>September YTD Growth</td>
</tr>
<tr>
<td><strong>207</strong></td>
</tr>
<tr>
<td>SEK Million</td>
</tr>
<tr>
<td>Liquid funds Q3 2016</td>
</tr>
<tr>
<td><strong>500</strong></td>
</tr>
<tr>
<td>customers</td>
</tr>
<tr>
<td>across the globe</td>
</tr>
<tr>
<td><strong>60</strong></td>
</tr>
<tr>
<td>countries</td>
</tr>
<tr>
<td><strong>44%</strong></td>
</tr>
<tr>
<td>Brand Awareness in 2016</td>
</tr>
<tr>
<td><strong>75Nps</strong></td>
</tr>
<tr>
<td>customers likely to recommend Net Insight</td>
</tr>
<tr>
<td><strong>+250</strong></td>
</tr>
<tr>
<td>Employees &amp; Consultants</td>
</tr>
<tr>
<td><strong>+30</strong></td>
</tr>
<tr>
<td>Patents</td>
</tr>
<tr>
<td><strong>30%</strong></td>
</tr>
<tr>
<td>R&amp;D Investment</td>
</tr>
</tbody>
</table>
Industry benchmark H1 2016

Reflected in Year-on-Year Top-Line Performance

1H 2016 Year-Over-Year Revenue Growth / Decline

Source: Company Filings. Most recent 6 month reporting period.

* Denotes relevant division
Calculated in reporting currency

Adobe 29%
Akamai 7%
ARRIS 35%
eatme 22%
AUTODESK 14%
AVID 21%
Belden 4%
brightcove 21%

Cisco 1%
DALET 4%
DOLBY 10%
dts 37%
eutelsat 0%
everitz 4%
EVIS 41%
HARMAN 2%

Harmonic 8%
Ikegami 13%
JVC 2%
Leader 8%
Media Links 21%
Nagra 2%

Prime Focus Limited 6%
Quantum 9%
SES 1%
technicolor 25%
TVlogic 24%
Vizrt 11%
Yamaha 1%

Source: IBC Show 2016 – Observation and Analysis Media Technology Industry by Devoncroft
<table>
<thead>
<tr>
<th>Network Type</th>
<th>Addressable Market 2016</th>
<th>Addressable Market in a few years</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast and Media Networks</td>
<td>470 MUSD</td>
<td></td>
<td>3-4%</td>
</tr>
<tr>
<td>Digital Terrestrial Networks</td>
<td>70 MUSD</td>
<td></td>
<td>Project driven will decline after 2017</td>
</tr>
<tr>
<td>Live OTT</td>
<td>500 MUSD</td>
<td></td>
<td>24%</td>
</tr>
</tbody>
</table>

Long-term growth and profitability

• Net Insight is growing with 52% during Q3

• Delivering an operating margin of 15% in Q3

• Strong profitability from our core business financing investment in the new segment of Live OTT
Customer and business perspective
Film describing Live OTT and the future media experience

https://youtu.be/Qh12BPfVLjQ
Our value is to increase productivity in the TV production chain and generate new revenues

**TV consumer proposition**
Sye generates new revenues

**Service provider proposition**
Nimbra and ScheduALL automates network provisioning

**Network owner proposition**
Nimbra optimize total cost of ownership with the right quality

**TV company proposition**
ScheduALL & Nimbra increase efficiencies by handling personnel and equipment
Transforming the company is a condition for future growth

Product oriented

- Selling focused on products and networks - Box-shifting
- Communication focused on features, functions and facts
- Differentiation on product level
- Seen as technology experts
- Emphasis on the Nimbra brand
- Customer Satisfaction
- Emphasis on one-time hardware sales

Customer and market oriented

- Living the Net Insight brand
- Value-based selling & Solutions
- Communication based on solving customer problems & industry trends
- Differentiation on a company level
- Visionary and true partnership complementing the technology experts
- Building Net Insight as brand
- Customer Net Promoter score
- Portfolio consisting of both hardware and software based solutions
- Recurring revenue models
More than 500 customer around the global
77% willing to recommend
Revenues

~85%  
Revenue from repeat customers

~30%  
Recurring revenue from Services & Support

~20%  
Revenue from Software Licenses
The media and broadcast industry is transforming
The industry is undergoing significant transformation

- Changing habits of TV viewers
- More efficient workflows
- Transformation of media networks
# Projects Index 2016

Measures end-user implementation and plans to **spend money** over the next 12 months

<table>
<thead>
<tr>
<th>Project Description</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install or enhance workflow / asset management system</td>
<td>29</td>
</tr>
<tr>
<td>Upgrade cameras</td>
<td>26</td>
</tr>
<tr>
<td>Cloud services / cloud technology</td>
<td>25</td>
</tr>
<tr>
<td>Upgrade infrastructure for HD / 3Gbps operations</td>
<td>24</td>
</tr>
<tr>
<td>Upgrade transmission and distribution capabilities</td>
<td>24</td>
</tr>
<tr>
<td>Build new studios / outside broadcast vans</td>
<td>22</td>
</tr>
<tr>
<td>Archive-related projects</td>
<td>22</td>
</tr>
<tr>
<td>Move to automated operations</td>
<td>22</td>
</tr>
<tr>
<td>Distribute and monetize content on multiple distribution platforms</td>
<td>20</td>
</tr>
<tr>
<td>Launch new channels</td>
<td>19</td>
</tr>
<tr>
<td>Upgrade audio capabilities</td>
<td>19</td>
</tr>
<tr>
<td>Upgrade newsroom operations</td>
<td>13</td>
</tr>
<tr>
<td>Migrating from copper to fiber</td>
<td>13</td>
</tr>
<tr>
<td>Install or revamp business management system</td>
<td>11</td>
</tr>
<tr>
<td>Implement disaster recovery</td>
<td>11</td>
</tr>
<tr>
<td>Consolidate operations in regional hubs (centralcasting)</td>
<td>9</td>
</tr>
<tr>
<td>Prepare for analog switch-off</td>
<td>7</td>
</tr>
<tr>
<td>Outsource operations e.g. playout</td>
<td>7</td>
</tr>
<tr>
<td>Archive-related projects</td>
<td>5</td>
</tr>
<tr>
<td>Upgrade cameras</td>
<td>5</td>
</tr>
<tr>
<td>Build new studios / outside broadcast vans</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
<tr>
<td>None of these</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Devoncroft report 2016 - Global N=2993)
Primary product choice factors 2016

Source: Devoncroft report 2016 - Video Transport (N=792)

- Technical Performance: 40%
- Saving Money / Being more Efficient: 28%
- Purchase Price: 13%
- Raising Revenue: 11%
- After sales service and support: 9%

Net Insight
A diversified competitive landscape

Media Resource Management
- Xytech
- Dataminer
- Vimsoft
- Farmerswife
- Inhouse Bespoke

Media Network
- Cisco
- Evertz
- Medialinks
- LiveU
- Nevion
- Riedel

Live OTT
- Providers to legacy CDNs
  - Edgeware
  - Ericsson MDN
  - Anevia
  - Concurrent
  - Arris
- Live OTT initiatives from today’s CDNs
  - Akamai
  - IBM
  - Broadpeak Nano-CDN
## Higher awareness for Net Insight

### Video transport

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>22%</td>
<td>28%</td>
<td>29%</td>
<td>32%</td>
<td>39%</td>
<td>44%</td>
</tr>
<tr>
<td>APAC</td>
<td>25%</td>
<td>28%</td>
<td>30%</td>
<td>34%</td>
<td>42%</td>
<td>47%</td>
</tr>
<tr>
<td>EMEA</td>
<td>27%</td>
<td>35%</td>
<td>35%</td>
<td>40%</td>
<td>43%</td>
<td>54%</td>
</tr>
<tr>
<td>Americas</td>
<td>15%</td>
<td>20%</td>
<td>21%</td>
<td>22%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: Devoncroft Big Broadcast Survey 2011-2016

Capital Market Day Nov 22 2016 | Net Insight
Shaping
the future of media
## Clear strategy for growth

### Market Innovator
- Repositioning of the company – glass to glass
- New brand – visionary, true partner and experts
- Customer and market orientation
- New price models – shift towards recurring revenues

### Grow core business
- Broadened our portfolio with new solutions, resource management, contribution over internet, standardization
- Doubled our market awareness from 22% to 44% in five years
- Grow our service business and secure customer loyalty

### Leadership Position in Live OTT
- Announcing the entrance in Live OTT
- Launching of Sye
- Announcing customers

### Grow through M&A
- Acquisition of ScheduALL
Technology & Offering

Martin Karlsson, CTO and VP Product Portfolio
The Broadcast World is Changing

Changing habits of TV viewers

• There has been an huge uptake in Video OTT services the last couple of years
• OTT as an efficient distribution of TV is changing the TV landscape
• OTT disrupting traditional value chains and overcoming traditional pay-TV platforms

More efficient workflows

• The competition increases and more content needs to be produced in a more cost-efficient way
• Resources efficiency is needed and the demand for automation in workflows increase
• Virtualization of studio resources

Transformation of media networks

• Transition in to IP in both transport and studios
• Media industry goes IT – virtualization opening up for commodity hardware
• In a virtualized world the network becomes key
Net Insight covers the TV production chain from camera to content owner to consumer

A product portfolio spanning glass-to-glass
Net Insight occupies a solid position in the market with some clear competitive advantages.

Unique Selling Propositions

**Contribution**
On-demand bandwidth
service isolation

**Production**
Personnel, resources, workflows

**Distribution**
Synchronization and
Time distribution

Net Insight simplifies network complexities and reduces Total Cost of Ownership.
Net Insight improves the performance of IP networks.
Technology Strategy

Key trends

- Capture the eyeballs
- Do more with less

Net Insight Technology & Strategic Pillars

- Build platforms and ecosystems to move up the value chain
- Towards virtualization and cloud based SaaS offerings
- Drive interoperability and standards compliance
- Leverage COTS Hardware platforms
From Hardware to

Software

and recurring revenue streams

Sye
ScheduALL
Nimbra VA
Nimbra MSR Features
SYE – A software-only cloud solution
ScheduALL Connector Community

Allows companies using ScheduALL to publish and sell resources to each other.

A service provider selling satellite capacity to a broadcaster.

Explosive growth in #transactions

2013 2014 2015 2016 2017

100000 10000 1000 100
Next generation media networks

Software defined and agile, with assured quality and performance

DEPLOY SERVICES FAST
• Provision and develop new services quickly

AUTOMATE EVERYTHING
• Customer, application and workflow provisioning

MIX APPLICATIONS
• Live, file and IT

RETAIN BROADCAST QUALITY
• Quality AND availability
It’s a Software Defined Network

Workflows

Applications

Control & Orchestration

ScheduALL

Nimbra SDN Controller

Infrastructure

Nimbra on IP

Nimbra on IP

Nimbra on IP

Nimbra on IP
Towards a Global Media Network

One service

...and of course end-to-end customer provisioned
Business and Financial position

Thomas Bergström CFO
Business models

Nimbra

- Expansion into new media services
- Expansion of media networks with new points of presence (PoPs)
- Implementation of new resource management system
- Expansion of new users
- Expansion of new functions
- Expansion into new media services

ScheduALL

- Implementation of new resource management system
- Expansion of new users
- Expansion of new functions

Sye

- Implementation of live OTT services
- Expansion of new viewers
- Expansion of usage per viewer

- Software and services
- Licence fees based on users
- Licence fees based on nodes
- Software maintenance & support

- Software and some services
- Recurring revenues based on traffic or clients
- Installation and integration

- HW, SW and services
- Initial HW & License pricing
- Added functionality & capacity charged separately
- Support charged on installed base + professional services
Regional development

- Rest of the World
  - Diverse market conditions – high growth
  - Middle East and Africa growth engine
  - Indirect business model

- Americas
  - North vs South
  - US worlds largest media market
  - Increase footprint

- Western Europe
  - High Nimbra penetration
  - Share of pocket
- HW pricing shifted in favour of SW
- Some price pressure on HW
- Support and Maintenance revenues important – recurring nature
Gross margins

An incremental change in sales volume of 10 MSEK affects gross earnings by ~7.5 MSEK

- Strong gross margins maintained
- COGS consist mainly of manufacturing cost and services staff
- R&D amortization to sales has decreased to around 12% of sales
Building for growth

**EXPENDITURES (MSEK)**

<table>
<thead>
<tr>
<th>Year</th>
<th>G&amp;A Expenses</th>
<th>Selling Expenses</th>
<th>R&amp;D expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>96</td>
<td>106</td>
<td>27</td>
</tr>
<tr>
<td>2013</td>
<td>86</td>
<td>105</td>
<td>23</td>
</tr>
<tr>
<td>2014</td>
<td>82</td>
<td>108</td>
<td>30</td>
</tr>
<tr>
<td>2015</td>
<td>97</td>
<td>122</td>
<td>41</td>
</tr>
<tr>
<td>R 4 Q SEP '16</td>
<td>142</td>
<td>56</td>
<td></td>
</tr>
</tbody>
</table>

**EXPENDITURES TO SALES (%)**

<table>
<thead>
<tr>
<th>Year</th>
<th>G&amp;A Expenses</th>
<th>Selling Expenses</th>
<th>R&amp;D expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>34%</td>
<td>37%</td>
<td>10%</td>
</tr>
<tr>
<td>2013</td>
<td>31%</td>
<td>37%</td>
<td>8%</td>
</tr>
<tr>
<td>2014</td>
<td>22%</td>
<td>28%</td>
<td>8%</td>
</tr>
<tr>
<td>2015</td>
<td>26%</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>R 4 Q SEP '16</td>
<td>30%</td>
<td>28%</td>
<td>12%</td>
</tr>
</tbody>
</table>

- Overall – increase in expenditures related to acquisition of ScheduALL and Live-OTT
- R&D to sales on high levels to cater for Live-OTT investments
- Economies of scales in selling expenses
- Structural change and larger company initially drives G&A increase

**NB:** above figures do not reconcile to opex in the P&L. R&D is shown before capitalization
Financial focus areas

- 40% growth YTD, 20% organic growth
- Growth driven by Core business
- Core business financing investment in the new segment of Live OTT
Strong cash position to support growth

- Positive cash flow despite investments in Live OTT
- Strong cash position for flexibility
- Strong balance sheet builds long-term trust
Live OTT

Per Lindgren SVP Live OTT
Establish a leading position in Live OTT

Enter the OTT market in November 2015

Launch the solution Sye in April 2016
Commercial testing is ongoing

Announcement of TATA to provide global Sye services

Announcement of SIS for B2B video distribution
Which services are out in the market?

Live OTT already exists
live news and live sports as play services

BUT
- Latency problems
- No synchronization
- Poor quality
- Social is broken
- No interactivity
Synchronized Live OTT

The solution to deliver true live streaming video over the Internet with low delay and frame-accurate synchronization between devices.
True Live OTT monetization is based on interactivity

- Enables social interaction
- Enables supreme QoE
- Preventing TV Cord-Cutting
- Enables true live betting
- Enables breaking news
- Re-inventing the 2nd screen advertisement model
Live OTT viewing is growing

Share of OTT content viewed being Live content

CAGR +40%

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of OTT content viewed being Live content</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>9%</td>
</tr>
<tr>
<td>2014</td>
<td>13%</td>
</tr>
<tr>
<td>2015</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Mediavision 2016 Swedish viewers
Live OTT market segments

OTT – Live
OTT – Linear Recorded
OTT – Live Enhanced Screen
Content value chain for Live OTT

VoD  |  Catch-Up  |  Linear TV  |  Live TV  |  Events

Content Owners/Right’s Holders

Content Aggregators Programs
Content Aggregators Channels

CDN – Content Delivery Network

Consumers

Share of volume
Enabling new business model for content owners

Yesterday

Content Owner

Broadcasters

Channels

Operators

TV Offering

Consumers

TV

New Today

Content Owner

Broadcasters

Content

Operators

TV Offering

Consumers

OTT TV TV

New Trend

Content Owner

Broadcasters

Content

Operators

TV Offering

Consumers

OTT TV TV

With Enhanced Screen

Content Owner

Broadcasters

Content

Operators

TV Offering

Consumers

OTT TV TV

Capital Market Day Nov 22 2016 | Net Insight
Consumers are willing to pay for Live Sports

Paying 4.5 times as much for sports

**C MORE**
C More Film

99 kr/mån

**VS**

C More Sport, Film och Serier

449 kr/mån

**XX CHANNEL**
Sport, film, serier

Pay $x$ times for TRUE LIVE SPORTS

???kr/mån
Revenue sources for True Live OTT

TRADITIONAL CDN

CDN Streaming Gigabyte/hour

TRUE LIVE CDN

CDN Live Streaming Gigabyte/hour

Uptake

Interactivity & Personalization per Client

Total Revenue base for Live OTT
User based price model

- New revenue streams and business models
- Integration into existing TV-solution
- Customer trials towards viewers are done in phases

Revenue Stream

1. Initial sales process
2. Pilot
3. Commercial testing
4. Consumer launch
5. Revenue Stream

Customer relationship building

Revenue
The Sye solution can be implemented and provided in different ways.
A greater TV experience
the benefits for the TV user

SYNCHRONIZED TV
Independent frame sync across devices enabling shareable and social interaction

LOW DELAY
Constant, but configurable low delay enabling harmonization with broadcast references, which provides an elevated live viewing experience, with Sye powered extended screen

PREMIUM EXPERIENCE
Instant channel change and stateful ABR providing premium user experience. Resilient streaming and higher utilization provides better picture quality. Multi picture in/and picture rendering support with auto rate adaption.

FAST CHANNEL CHANGE
Instant and intuitive channel changes for a better live user experience

FAST AND SEAMLESS CASTING TO SET-TOP-BOXES
Offer seamless TV experience cross platform, allowing instant casting of video from second screen to the primary screen without any delay nor time gap
Industry Acknowledgement
TATA COMMUNICATIONS’ MEDIA ECOSYSTEM

BRIAN MORRIS
VICE PRESIDENT & GENERAL MANAGER
GLOBAL MEDIA & ENTERTAINMENT SERVICES
Tata communications is enabling seamless global transport and management of content as a cloud-based managed service.
TATA COMMUNICATIONS AT A GLANCE

#1 WHOLLY OWNED WORLD'S LARGEST SUBSEA FIBRE NETWORK

1.5 MILLION SQ.M. OF DC SPACE

SERVE 4 / 5 MOBILE SUBSCRIBER

2000 SERVICE PROVIDERS | VIDEO NETWORK TO OVER 300 MEDIA HOTSPOTS / 125 CITIES GLOBALLY

8 OF THE WORLD'S 10 MOST POPULAR WEB DESTINATIONS | 3 OF THE 5 MOST VISITED VIDEO SITES | 4 OF THE WORLD'S 5 MOST POPULAR SOCIAL NETWORKS
**MACRO TRENDS IMPACTING MEDIA AND ENTERTAINMENT INDUSTRY**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5m+</strong></td>
<td>Years to watch the amount of video that will cross global IP networks each month in 2020.</td>
</tr>
<tr>
<td><strong>82%</strong></td>
<td>Of all IP traffic will be video traffic by 2020.</td>
</tr>
<tr>
<td><strong>70%</strong></td>
<td>Of global internet traffic by 2017 will be contributed by OTT video / audio.</td>
</tr>
<tr>
<td><strong>58%</strong></td>
<td>CAGR between 2016 - 2022 in the virtual reality market.</td>
</tr>
<tr>
<td><strong>2x</strong></td>
<td>Growth expected in consumer VOD traffic by 2020.</td>
</tr>
<tr>
<td><strong>7x</strong></td>
<td>Growth expected in internet gaming traffic by 2020.</td>
</tr>
</tbody>
</table>
THE MEDIA VALUE CHAIN IS MOVING TOWARDS VIRTUALISED INFRASTRUCTURE

- Independent software vendors
- Post production suites
- Data centre & hosting services
- Content libraries
- Cloud services
- Storage
- Terrestrial video networks
- Mobile platforms
- OTT and IPTV
- CDN networks
- Security
- Satellite earth stations

BROADCASTER/CONTENT OWNER
THESE CHANGES ARE DRIVEN BY CHANGING CONSUMER BEHAVIOUR

**Films**

Electronic home video
Revenue to take over box office revenue in 2017

- $12b In home
- $11.8b Box office

**Music**

Digital Music Streaming
#1 recording music category in 2018

- $1.78b Streaming
- $1.65b Download
- $1.58b Physical

**Television**

75% viewers binge watch
TV series on streaming services, such as Netflix

**Advertising**

Internet advertising
Expected to grow at 12.1% CAGR

- During 2014-19, overtaking TV advertising by 2017

**Ebooks**

2x growth in E-book
Sales over 2013-18, accounting for 26% of total book sales by 2018

**Gaming**

Mobile game revenue
Expected to exceed sales of console games by $4b

Globally in 2015
WE ARE ENABLING CUSTOMERS ACROSS SEGMENTS LEVERAGE THESE TRENDS

<table>
<thead>
<tr>
<th>CONTENT OWNERS</th>
<th>BROADCASTERS</th>
<th>SPORTS FEDERATIONS &amp; TEAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>VICE MEDIA</td>
<td>sky</td>
<td>Formula 1</td>
</tr>
<tr>
<td>Disney</td>
<td>STAR</td>
<td>Indian Premier League</td>
</tr>
<tr>
<td>Red Bull Media House</td>
<td>ATX</td>
<td></td>
</tr>
<tr>
<td>Viacom 18</td>
<td>ZEE TV</td>
<td>TATA Sky</td>
</tr>
<tr>
<td>IRISH TV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NBC Universal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NEWS NETWORKS</td>
<td>AGGREGATORS</td>
<td>SERVICE PROVIDERS</td>
</tr>
<tr>
<td>Thomson Reuters</td>
<td>d</td>
<td>technicolor</td>
</tr>
<tr>
<td>AP</td>
<td>PERFORM</td>
<td>Encompass</td>
</tr>
<tr>
<td>Al Jazeera</td>
<td></td>
<td>CHINA TELECOM</td>
</tr>
<tr>
<td>NC TV</td>
<td></td>
<td>Lebara Mobile</td>
</tr>
<tr>
<td></td>
<td></td>
<td>GLOBECAST</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>DTH / CABLE COMPANIES</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Comcast</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TATASKY</td>
</tr>
</tbody>
</table>
WE ARE MEETING OUR CUSTOMERS’ KEY NEEDS

**DRIVE REVENUE**
- Launch new services at the touch of a button
- Translate broadcast heritage ready for a cloud-based world
- Reach new markets, access new content sources

**TRANSFORM OPERATIONAL EFFICIENCY**
- Leverage the world’s most extensive video-networked infrastructure
- Be more responsive to changing market conditions
- Enjoy the financial benefits of outsourcing, while keeping control of your business

**TURN CAPEX INTO OPEX**
- Avoid the time, risk and capital of build-your-own
- Drive business growth, knowing that you can scale on demand
OUR MEDIA ECOSYSTEM IS AN END TO END INTEGRATED SOLUTION

VIDEO CONNECT
A fibre-based global media transport network to over 300 media hotspots across 125 cities supporting broadcast quality real time video

SATELLITES
Up-link and down-link satellite teleport services, seamlessly integrated with our global fibre and content delivery networks

WORKFLOW AUTOMATION & PLAYOUT
A full suite of solutions that enables asset management and storage, review and approval, workflow automation

OTT
Our OTT platform enables our clients to bring linear channels, live events and video on demand (VOD) content to Internet connected devices anywhere in the world

CDN
Content Delivery Network: A cloud-based service for accelerating web content, videos, and live streams to audiences around the globe.

Ultra Live OTT
A Low Latency synchronous streaming network that rivals the experience and quality of traditional broadcast
OUR MEDIA ECOSYSTEM DELIVERS

GLOBAL COLLABORATIVE WORKFLOWS BASED ON A SUITE OF INTEGRATED FILE-BASED SERVICES

Uniting creative groups, production house, distributors, broadcasters, and retailers

TRANSCODING SERVICES

A video network like no other, 300 media hotspots in 125 countries, moving content at the lowest cost to any device

CONTENT INGEST

OTT PLATFORM-AS-A-SERVICE

ASSET MANAGEMENT

CLOUD MASTER CONTROL/PLAYOUT

WORKFLOW AUTOMATION
POWERED BY OUR GLOBAL INFRASTRUCTURE

- Video Connect network and main global links
- Secondary global links
- Main teleports connected
- Main switching points
- Video MPLS network
- Existing CDN nodes
- Planned CDN nodes
- Data centre network

- +12 planned nodes in India
- Global reach through our MPLS network
- Video Connect offers a meshed network with global satellite reach
- All video pops are diversely routed with redundant equipment linked to Tata Communications' 210,000 km network
- All secondary links are connected directly to clients
WE HAVE BEEN HELPING TRANSFORM THE EXPERIENCE OF FORMULA 1™

FORMULA ONE MANAGEMENT

- 10X faster connectivity to all 21 circuits across the globe 87 races to-date
- Enabling remote operations in UK
- Robust and scalable data centre infrastructure for F1.com – 10 millions users each month

BROADCASTERS

- Video over fibre
- Commentary service
- End to end Media Ecosystem solution
- Official distributor for GP2, GP3, Porsche Super Cup races

TEAMS

- Real time car data communications across the globe in 0.244 secs
- Remote IT operations
- Real time social media enablement on track

FORMULA ONE MANAGEMENT

TEAMS

BROADCASTERS
“The integration of our operations in Europe is focused on accelerating innovation and serving our viewers better - and Tata Communications’ global fibre network will help us do just that.”

Keith Lane
Director of Operations at Sky
"There are 10,000 kilometres and several time zones between the match locations, so we need a partner with the reach and capability in both Europe and Asia to distribute these matches internationally. Working with Tata Communications will enable us to deliver a brilliant viewing experience for fans."

Phillipe Spanghero
Director of SL Events

WE HAVE DELIVERED RUGBY UNION MATCHES TO 100 COUNTRIES
WE SEE A STRONG DEMAND FOR LIVE OTT SERVICES

THE CURRENT DRAWBACKS OF LIVE OTT:

• 30s to 5min delay between first and second screen
• Different OTT screens can be seconds or minutes apart

THE SOLUTION WITH LIVE OTT:

• Different OTT screens can be in sync around the world, just like a true broadcast
• Latency on par with traditional broadcast of 1-2 seconds vs. 30s to 5 minutes
OUR PARTNERSHIP DELIVERS A STRONG CUSTOMER PROPOSITION...
DELIVERING A FEATURE PACKED SERVICE OFFERING

1. Predictable, configurable, fixed latency providing true live broadcast to our consumers

2. Synchronised screens enabling social interaction and interactivity - Monetisation through subscription/advertising/pay per view models

3. Higher media quality. Fast channel change enabling seamless channel swipe

4. World class platform but without very high capital investment
THANK YOU

tatacommunications.com
Reasons to invest in Net Insight

A clear strategy for growth

Market Transition
- Expanding video traffic
- Expanding in live streaming
- Centralized production demands more network capacity
- TV distribution over the Internet (OTT) driving new content production
- Increase in file-based workflows

Innovative Technology
- Improving QoS over IP networks
- End-to-end orchestration
- Reducing TCO
- Optimizing bandwidth utilization
- Patents related to QoS, synchronization, scalability

Global Reach
- 500 customers
- 60 countries
- 50 resellers
- International professional media brand
- Customer Net Promoter score
Demonstration

Customer Provisioned Networks

Live OTT