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MAKING THE LINK

Focus on Eutelsat's Rambouillet teleport and space centre

URBAN DEVELOPMENTS

TRACE TV tracks the global city sound

GO WITH THE NEW WAVE

Mobile broadcasting on the S-band

A CLEAR VIEW

Our recent survey reveals the facts and figures about developments in satellite and cable reception

March 2007

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03 IN THE NEWS

All the latest from the world of satellite broadcasting, with a brief round-up of Eutelsat's headline news stories.

04 EXPLORING RAMBOUILLET

We take a look at recent developments at Rambouillet, Eutelsat's state-of-the-art teleport and space centre.

05 UPWARDLY MOBILE

Answering the questions about plans for mobile video, radio and data broadcasting in the S-band.

06 SURVEYING THE LANDSCAPE

Eutelsat's survey confirms strong dynamics of satellite and cable reception.

08 URBAN SOUNDS

TRACE TV is making music right across the world, reflecting the urban sounds of today's upbeat youth.

09 FROM RUSSIA WITH NEWS

Russia Today is changing the way the world sees Russia, while MultiChoice Africa continues to develop new African markets.

10 QUICK FIRE

A satellite-based mobile broadband solution keeps firefighters in touch, and NetHope makes the connection with its NGO members.

11 ON THE HORIZON

HSS explains how DVB-S2 creates greater value for its customers and GT&T launches its new SVNO at CABSAT.

12 A QUESTION OF HD

IDATE has clearly defined the answers to key questions about the growth of the HDTV market in Europe.

EDITORIAL

This year sees the two major networking events, CABSAT in Dubai and SatCom Africa in Johannesburg, opening their doors at a time of significant momentum for digital video and broadband services.

In this context, the last few months have seen the successful launch of two new satellites for Eutelsat, HOT BIRD™ 7A and HOT BIRD™ 8 at 13° East, and the in-orbit redeployment of ATLANTIC BIRD™ 4 to 7° West. The new capacity provided by these three satellites has been used to support an impressive 37% rise in the number of channels carried by our fleet to a figure in excess of 2 400. Reflecting the dynamics of emerging markets, half of this expansion has been due to demand in eastern and central Europe, the Middle East and Africa, regions accounting for more than 300 new TV channels in the last 12 months and which we shall naturally be showcasing in this issue.

We also invite you to discover the main results of our latest survey. These reveal that satellite and cable reception in Europe, North Africa and the Middle East has expanded twice as fast as the increase in television homes, passing 50 per cent penetration in 42 countries. The same survey also confirms the leading role of Eutelsat's HOT BIRD™ neighbourhood, where audience reach progressed to 121 million homes by the end of 2006, while breaking through the barrier of 1000 channels.

Of course, an overview of recent developments would not be complete without addressing the take-up of HDTV, which is now carried on 17 channels in our fleet and saw more than 25% of the live links and television exchanges between broadcasters routed via our satellites for the Football World Cup. To comment on short and medium-term growth prospects for HD, we have invited a senior IDATE analyst, Jacques Bajon, to give us his expert view.

As well as video markets, satellite-based data and broadband services continue to experience rapid expansion for applications such as Internet access, backbone connectivity, VoIP, GSM trunking, and content feeds to fixed or mobile transmitters. These markets now represent just over 15% of the global revenues of Fixed Satellite Services (FSS) operators and 20% of Eutelsat's business. *Via Eutelsat* invites you to read about some of the latest deployments of new broadband solutions for enterprises, local administrations and NGOs. We also talk to Antonio Arcidiacono, Eutelsat's Director of Innovation, about the recent joint venture with SES Global to develop Europe's first satellite infrastructure in S-band. This will be used for the delivery of mobile broadcast services direct to user terminals, for a wide range of applications from entertainment services to security-based communications.

We look forward to meeting you at CABSAT and SatCom Africa and to working with you on the continued development of satellite communications throughout Africa, the Middle East and central Asia.

Olivier Milliès-Lacroix
Commercial Director



new

SIGNALS



>> A NEW CONTINENT AND A NEW LANGUAGE FOR LUXE.TV

LUXE.TV, the free-to-air channel focused on luxury lifestyle that broadcasts in Standard Digital and High Definition, has chosen Eutelsat's W5 satellite to extend its reach to South-East Asia. Since mid-January, the channel's High Definition version has been available throughout the region in English and French. LUXE.TV began its English-language soundtrack in December 2006, complementing its existing French and German language options.

Launched in June 2006, LUXE.TV programmes are produced in High Definition by teams based in 20 capitals around the world, including Paris, New York, Tokyo and Dubai, in order to build diverse, multi-cultural content. Broadcasting 24 hours a day, the English-language soundtrack joins the French and German versions available in Standard Digital and High Definition. LUXE.TV also broadcasts on HOT BIRD™, SESAT 1, W3A and W5.

>> MALI INITIATES INTERNATIONAL SATELLITE BROADCASTS OVER EUROPE VIA W3A

Satellite broadcasts across Europe by Mali's national public broadcaster, ORTM (Office de Radio et de Télévision de Mali) were officially launched on 17th February by the country's President, Amadou Toumani Touré. During an official visit to France, the President inaugurated the international broadcasts of ORTM on Eutelsat's W3A satellite which enables direct-to-home reception across Europe with domestic antennas. Eutelsat partnered with CB Networks to agree delivery of the service.

>> AL JAZEERA LAUNCHES NEW DOCUMENTARY CHANNEL

Just six weeks after the launch of Al Jazeera English, Al Jazeera Network began the New Year with the launch of its new 24-hour Arabic Documentary Channel. The new channel joins Al Jazeera, Al Jazeera English and Al Jazeera Children's Channel, which all broadcast through Eutelsat satellites to homes in Europe, North Africa and the Middle East.

Broadcasting 24 hours per day, the channel's ambition is to become a leader in its field, promoting a documentary culture in the Arab world and beyond. Programme themes range from social, political and cultural issues, to science, history and the environment. Content is sourced from material produced in-house, as well as from partnerships with international producers. The new channel broadcasts in Arabic, via Eutelsat's HOT BIRD™ 8 and EURO BIRD™ 2 satellites.

>> NEW DIGITALB MOBILE TV PACKAGE

DigitALB, the Albanian pay-TV operator, announced the launch of its mobile TV offer in December 2006, via Eutelsat's W2 satellite.

The DVB-H service, DigitALB Mobile, delivers a range of entertainment programmes to mobile phones throughout Albania. There are currently 14 channels, with plans to increase it to 16. At the launch of the service, 50% of Albanian territory was covered, with 24 transmitters delivering content to Tirana and other cities around the country. The second phase of the project aims to extend coverage to 80% of the territory. DigitALB, with over 30 channels, is Albania's only pay-TV operator.

>> OVER 1000 TV CHANNELS BROADCAST FROM HOT BIRD™ NEIGHBOURHOOD



The 1,000+ television channels transmitting today via Eutelsat's four HOT BIRD™ satellites, constitute one of the world's largest broadcasting systems. This rich line-up, broadcast from the orbital position of 13° East, comprises channels broadcasting in more than 40 languages to over 40 countries.

Thematic television accounts for 73% of channels with the following categories in pole position: cinema and fiction (136 channels), sport (93 channels), news (73 channels), and documentaries (65 channels). 47% of channels broadcast via Eutelsat's HOT BIRD™ position are available free-to-air.



From left to right: Olivier Milliès Lacroix, Amadou Toumani Touré, President of the Republic of Mali, Gaoussou Drabo, Mali's Minister of Telecommunications and New Technologies

the view from ABOVE >>

Sending out all the right Signals

Eutelsat's state-of-the-art teleport at Rambouillet enables broadcasters and service providers to deliver their services around the world

Since acquiring the Rambouillet teleport over two years ago, Eutelsat has built up and extended its infrastructure and facilities to address the growing demand for comprehensive broadcast, telecom and broadband services. Accessing satellites using C-band, Ku-band or Ka-band frequencies, the teleport is a unique access point to markets in Europe, Africa and the Middle East, as well as large parts of Asia and the Americas.

Rambouillet is also supported by a powerful, fully redundant and flexible ATM-based terrestrial telecommunications infrastructure, with Points of Presence (PoPs) at major carriers' hotels located in Paris, London, Frankfurt and Warsaw.

Redundant connectivity to the Internet is provided via four major Tier 1 ISPs, and worldwide call termination is available through partner telecom operators.

A leading video broadcast and distribution centre

Video broadcasting services include signal transport, audio/video encoding, multiplexing, turnarounds and video encryption. Major broadcasters such as Turner Broadcasting Systems, TF1 and AXN Europe use the facilities for seamless broadcast services.

For the AXN Europe stable of channels, which are part of Sony Pictures Television International, Eutelsat takes video and audio signals in SDI format from the AXN playout centre in London, encodes them in MPEG2 and transports them by fibre to the Rambouillet teleport, via PoPs in London and Paris.

Here the content is encrypted, multiplexed into a DVB stream and transmitted to Germany, Poland, Romania, Hungary and Bulgaria, via Eutelsat's W2 satellite.

Data services to keep nations in touch

The teleport also hosts data services operated by Eutelsat's Partners (ISP's, integrators, etc) including point-to-point links, IP trunking, Internet access, private networks, VoIP and other interactive IP based applications.

VoIP transport services over satellite are ideal for telephony and GSM trunking. Signals from remote sites, with little or no existing infrastructure, are connected directly via the teleport to telecommunications operators at Eutelsat PoPs.

Solutions include equipment provisioning, space capacity, teleport services, Internet access and voice termination. Sytea, for example, based in Niger, has chosen Eutelsat's turnkey VoIP operation through the Rambouillet teleport, in cooperation with Eutelsat's partner B3G, to put in place a satellite/WiMax solution for VoIP and Internet, for large businesses and embassies throughout the country. The service enables Sytea to avoid overloaded, and often limited, terrestrial networks in order to provide a high-speed Internet service that can be rapidly deployed.

Major African Internet Service Providers use the trunking services provided via the teleport to feed their networks, at bit rates up to 70 Mbps.

Satellite and payload control

In addition to supporting commercial services, the teleport is also used for satellite operations such as Early Orbit Phase (LEOP) activities, satellite commissioning In Orbit Tests, satellite control activities and payload control and monitoring.

Whilst providing Eutelsat with complete control over its own satellite operations, these facilities make Eutelsat's international teleport at Rambouillet a true space centre.



Eutelsat Rambouillet teleport



A new wave of mobile broadcasting

Eutelsat and SES Global announce plans to invest in S-band

Eutelsat and SES Global are to invest in Europe's first satellite infrastructure in the S-band for broadcasting content, including TV channels, IP data and security-based services, to handheld devices and receivers in vehicles. VIA talked to Antonio Arcidiacono, Director of Innovation at Eutelsat, about the joint venture that will operate and commercialise S-band frequencies on Eutelsat's W2A satellite.

What makes the S-band so attractive?

Across Europe there is increasing demand to broadcast TV, multimedia content and data to mobile devices. There are, however, only very limited terrestrial frequencies available to meet this demand, before the switch-off of analogue television. The S-band frequency between 2.17 and 2.2 GHz is reserved for satellite only and not used in Europe today, providing an ideal spectrum for a mobile TV service. Another key advantage of the S-band is that satellites cover 100% of their intended markets, so mobile services can be extended beyond urban centres to rural areas or where there is no terrestrial broadband infrastructures.

Why is Eutelsat not developing the S-band on its own?

S-band is a new area for both companies, and

compared to our core businesses, it really is a niche market. After analysing the situation for some time, we both came to the conclusion that it would make sense to join forces to develop this new European communications market. We can work with one standard, one infrastructure, and roll-out the solution together.

Do you see the technical approach in direct competition to DVB-H?

Not at all. Both networks are complementary, and the new DVB-SH standard has been specifically designed with this objective in mind. The S-band can be used either to extend the coverage of the DVB-H service nationwide, or to provide additional bandwidth to add more channels to the mobile TV offering.

How would you describe the solution?

It will consist of a hybrid satellite and terrestrial based mobile infrastructure to broadcast a wide range of content including TV channels, IP data and security-based services, direct via satellite or indirect via terrestrial transmitters, to mobile devices, including handhelds and reception units in vehicles. Our joint venture covers the satellite part, and we are looking for partners for the terrestrial part of the business, including mobile operators, broadcasters or industrial groups with activities in these fields.

How many TV channels could be transmitted via S-band?

In a mobile environment, one TV channel requires between 256 and 384 kbps. That means 10 – 15 channels via satellite per 5 MHz slot. In addition, thanks to our hybrid approach, an additional 18 – 36 terrestrial channels can be broadcast terrestrially.

Which European markets is the solution aimed at?

The S-band payload of our W2A satellite is combined with six regional beams offering complete coverage of the markets in Germany, France, Italy, Spain, Poland and UK/Ireland. At the start, we would like to concentrate on two or three of these key markets.

Do you also plan to address end-users with the new service?

No, we will only address regional service providers. That might be mobile operators as well as content providers, who offer the services in their particular markets. These providers will order the capacity they need for their services from us as well as from the operators of the terrestrial networks.



Surveying the satellite and cable TV landscape

A recent Eutelsat survey illustrates how satellite and cable are now the preferred choice for multi-channel reception

Satellite and cable homes have passed the tipping point of 50% of TV homes across Europe, North Africa and the Middle East and Eutelsat's HOT BIRD™ video neighbourhood has consolidated its audience into 121 million homes.

Eutelsat's recent survey of satellite and cable homes, published in February, confirmed the continuing strong dynamic of satellite and cable reception in Europe, North Africa and the Middle East, which over the last 24 months has grown twice as fast as television homes.

Over this period, satellite and cable penetration has increased by 13% to 170 million homes from 150 million, while

television homes expanded by six per cent to 333 million homes from 314 million. This means that satellite and cable reception have passed the tipping point of 50% of television homes. North Africa and the Middle East continue to show the strongest traction, progressing by 10% each year. 59% of TV homes in western Europe are connected to cable or satellite (compared to 58% in 2004), 60% in North Africa and the Middle East (compared to 54% in 2004) and 33% in eastern Europe (compared to 31% in 2004).

Commissioned from leading research institutes including GfK, TNS Sofres and Ipsos, the new data produced in 42 countries* also confirmed the leadership of Eutelsat's HOT BIRD™ neighbourhood, whose audience at the end of 2006 showed impressive growth to 121 million homes from 111 million.

Forty per cent (47.5 million) of these homes are equipped for direct-to-home (DTH) reception,

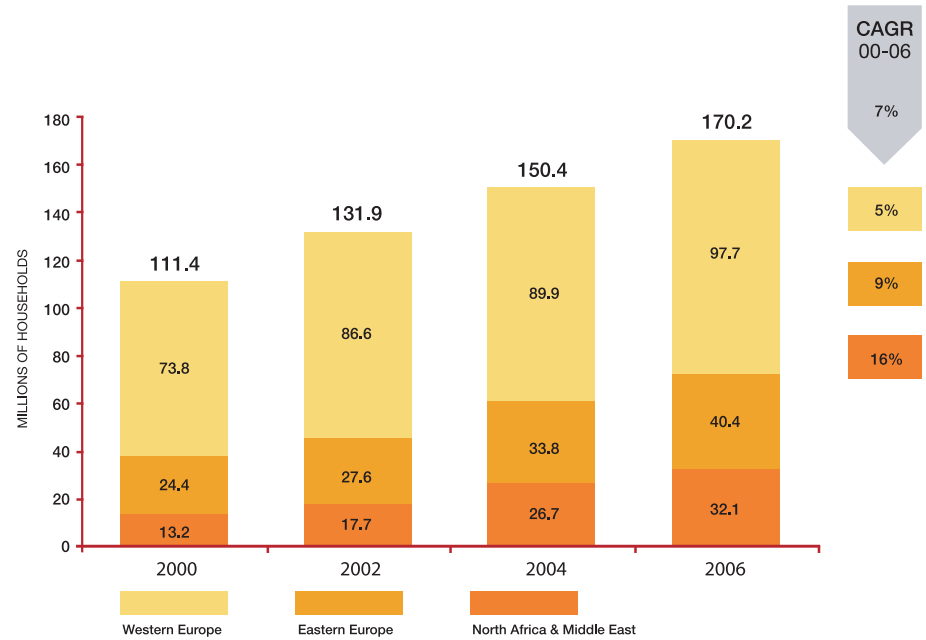
with the most dynamic DTH markets being Italy, which expanded by 280,000 satellite homes, and Poland which expanded by 211,000 satellite homes. In cable markets, eastern Europe drove the expansion of HOT BIRD™ penetration, with an increase of more than 30% to 22.5 million homes, driven by ongoing deployment of new cable infrastructure.

Satellite and cable homes at the HOT BIRD™ neighbourhood (in millions of homes)

The new research also recorded strong uptake of satellite and cable homes receiving channels from six other video neighbourhoods, which Eutelsat has actively developed for specific regions and language markets: EURO BIRD™ 1 (UK, Ireland), W2 (central Europe), W3A (Turkey), W4 (Russia, Ukraine), ATLANTIC BIRD™ 3 (satellite homes in France) and ATLANTIC BIRD™ 4 which is collocated with Nilesat and serves satellite homes in North Africa and the Middle East.



>> CABLE AND SATELLITE RECEPTION BY REGION



With the combined audience of these neighbourhoods and the HOT BIRD™ neighbourhood, channels broadcast by Eutelsat's video satellites are received by 164 million satellite and cable homes. This does not include emerging Digital Terrestrial Television (DTT) audiences in markets where satellites are feeding DTT retransmitters and providing complementary direct-to-home coverage.

Other headline results

Of the 170 million satellite/cable homes in Europe, the Middle East and North Africa:

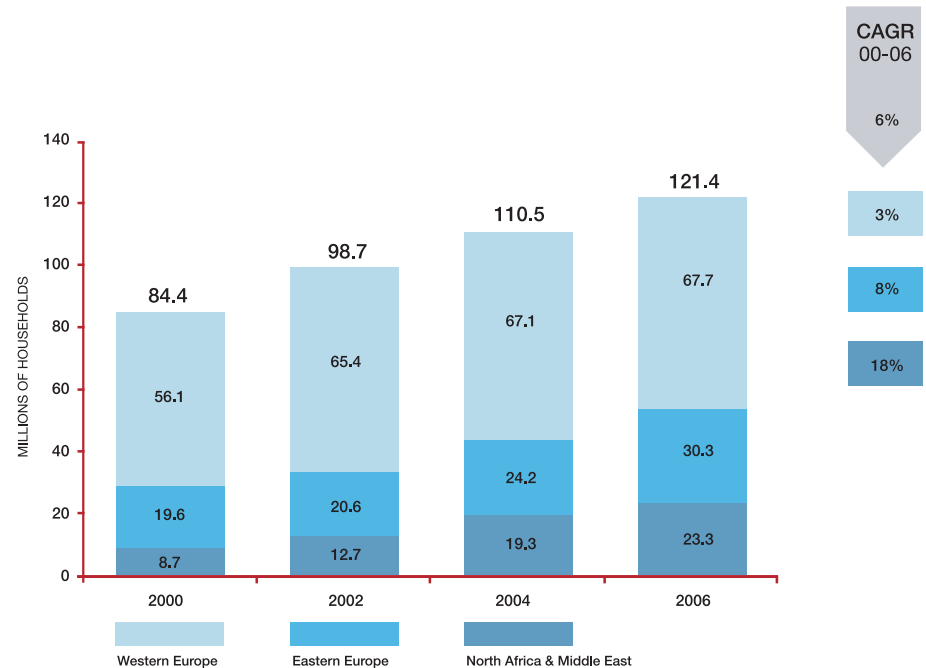
- 49% of satellite/cable homes are equipped for digital reception, i.e. 84 million homes (33% growth between 2004 and 2006);
- 39.2 million satellite/cable homes subscribe to digital pay-TV (9% growth between 2004 and 2006);
- Homes subscribing to digital pay-TV split between 29.3 million satellite homes and 9.9 million cable homes.

* **Western Europe:** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom

* **Central and eastern Europe:** Belarus, BiH, Bulgaria, Croatia, Czech Rep., Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Ukraine

* **North Africa, Middle East:** Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Saudi Arabia, Syria, Tunisia, Turkey

>> HOT BIRD™ CABLE AND SATELLITE RECEPTION BY REGION



Sources: Research Institutes 2005 & 2006, Eutelsat S.A. analysis

broadcast BITES >>

Tracing the sound of the city

In December 2006, TRACE TV selected capacity provided by Eutelsat to extend its reach to the Caribbean and the Americas. This is just the latest advance of a broadcaster that is mapping the world with urban sounds

Since its launch in 2003, TRACE TV has aimed to reflect France's widespread interest in urban music and culture. At the time, urban music, (hip-hop, rap, contemporary R&B, even reggae) accounted for the largest sales of music CDs in France, a fact not reflected by music channels. The channel was set up in Paris, offering a global mix of urban music to the 15-24 year age group.

Expanding beyond Europe, TRACE TV's next step was to target French-speaking countries in Africa and in the space of just four years has widened its net to cover large parts of the globe, broadcasting localised content to Europe, Africa, parts of Asia and now to the Caribbean and North and South America.

Globally, the pay-TV channel is available to 40 million households in 98 countries.

A partner in innovation

Eutelsat has accompanied TRACE TV from launch, providing satellite coverage and a broader partnership that has enabled the company to grow at such a rich rate.

Today, TRACE TV is broadcast via three Eutelsat satellites; HOT BIRD™ 8, which delivers DTH and to cable headends in Europe, North Africa and the Middle East; and W5 and TELSTAR 12, which also feed cable headends in the above regions, plus significant parts of Asia and the Americas. Content, broadcast in French and English, reflects the geographic regions which the channel reaches.

Olivier Laouchez, Chairman and CEO of TRACE TV commented on the important role that Eutelsat has played in the channel's successful expansion; "Eutelsat has not merely

enabled us to expand through providing technical solutions; they have been a true partner in every sense of the word, joining with us in marketing ventures, advising us on new territories and facilitating partnerships with other like-minded companies, for mutual benefit."

Urban mobility

TRACE TV is also available to viewers via a selection of mobile platforms, in countries including France, Belgium, Spain, Portugal and Poland. In France, mobile operator Orange, has ranked TRACE TV 7th out of the top 50 downloads. Similar deals have recently included an agreement with China Mobile, China's largest mobile network which finished 2006 boasting an amazing 301.2 million wireless subscribers, which is just a little over the entire US population!



Opening up choice in African TV

Committed to the development of TV in Africa, MultiChoice Africa is opening up new vistas of choice right across the continent

MultiChoice Africa is one of the leading multi-channel pay television operations in Africa, with a network of 47 countries across the continent and adjacent Indian Ocean Islands. Through Eutelsat's W4 satellite and more recently the SESAT platforms the company has seen good growth in subscriber numbers; major markets include Nigeria, Angola, Kenya, DRC, Ghana, Tanzania, Uganda and Mozambique.

MultiChoice Africa's CEO Eben Greyling commented on recent developments; "We remain focused on expanding our DStv service to subscribers to ensure we are able to deliver the best home entertainment in Africa. This has included the provision of additional Portuguese and French channels catering for the Lusophone and Francophone markets. We have focused on delivering channels that are recognised as the best in the world, while at the same time providing channels that are localised and relevant to the African market. For example, our DStv service includes the carriage of TPA in Angola, TVM in Mozambique, ZNBC in Zambia, KBC and NTV in Kenya, UBC in Uganda, RTNC in the Democratic Republic of Congo, Metro TV in Ghana and AIT, Minaj, MIT TV, NTA, Silverbird and Channels in Nigeria."

MultiChoice Africa is committed to Africa and the development of a vibrant and exciting television industry and has been a driving force behind the creation of African-oriented channels such as AfricaMagic (an African movie channel) and Channel O (the only 24-hour music channel made in Africa for Africa).

The company's commitment to Africa goes further to include educational-based projects, which contribute to broader developmental requirements in Africa. MultiChoice Resource Centres, which have been established in 233 centres across the continent, provide educational television content from selected channels as a valuable resource to learners. Research has established a significant improvement in the school results and interest from learners to the project.

A second language for Russia Today

Russia Today is making its mark on the international TV landscape, providing new perspectives on how the world views Russia



Russia Today, the first Russian news channel to broadcast 24/7 in English, was launched in December 2005. Founded to become the main source of information about Russia for foreign audiences, the appearance of the new player has not gone unnoticed.

"For millions of international viewers, Russia Today has provided an opportunity to broaden their 'information map of the world' and overcome many of the stereotypes about our country", comments Margarita Simonian, Editor-in-Chief of Russia Today. "We have had a huge responsibility to reflect the dynamically developing modern Russia, which has drawn the world's attention. Our objective is to demonstrate the spirit of new Russia in our news coverage, programmes, documentaries, and even in the studio's design.

Russia Today both informs its audience on significant events in Russia, while also giving a Russian perspective on global events. Over our first year, viewers have become increasingly interested in the channel, and we have won great recognition from the professional media fraternity, which has

been supported by the opening of our international bureaux, in Washington, New York, Cairo, Jerusalem, London, Paris, Kiev, Tbilisi and Vladikavkaz. The channel can be accessed free-to-air via the HOT BIRD™ 6 and EURO BIRD™ 1 satellites, as well as via the Internet. Russia Today is also available on several satellite pay-TV platforms, including BSkyB, NTV+, and MultiChoice in South Africa."

Following the success of the English-language channel, an Arabic-language channel, Rusiya Al-Yaum is due to be launched later this year. Rusiya Al-Yaum will broadcast free-to-air, 20-hours per day, via HOT BIRD™ 6, EURO BIRD™ 2 and ATLANTIC BIRD™ 4. Aimed at viewers in Arab and European countries, the channel will present news reports on current events, notably in Russia and the Arab world, but also worldwide. The Rusiya Al-Yaum team includes Russian and Arabic journalists, as well as specialists on the Arab world and the Orient. Along with news coverage, Rusiya Al-Yaum will also broadcast documentaries, press reviews and analytical programmes informing Arabic-speaking viewers on the political, economic, social and cultural aspects of modern Russia.

broadly

SPEAKING



NetHope connects its NGO members

90 D-STAR terminals installed in Africa, the Middle East and South Asia for aid organisations

NetHope is a collaborative organisation formed by the world's largest humanitarian aid organisations. Its mission is to provide IT equipment and solutions in countries where its members implement their programmes and projects.

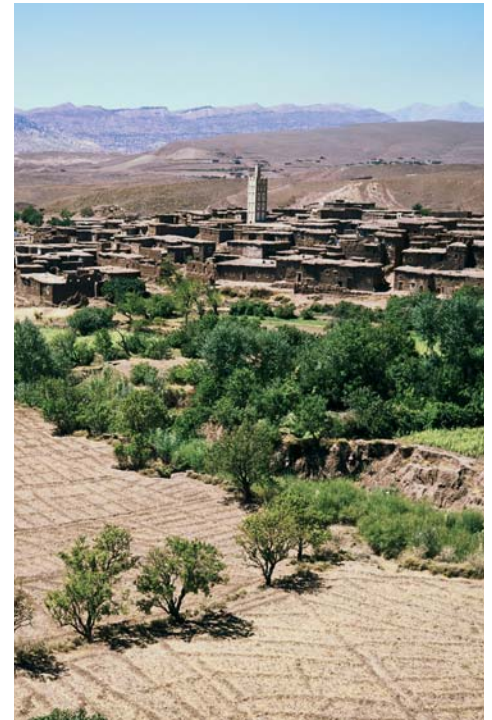
Broadband access is a key component for humanitarian agencies, whether it is for re-establishing communications as a matter of urgency following a natural disaster, promoting education, or supporting economic development of regions not connected to high-speed terrestrial networks.

In answer to the growing demand from humanitarian associations for easily deployable, migratory solutions for broadband access, NetHope has been working with Skylogic - Eutelsat's broadband subsidiary - to make D-STAR terminals available, from Paraguay to Nepal, that are simple and quick

to deploy, and with bandwidth consumption at a fixed price regardless of where sites are located.

Today, 90 bi-directional satellite terminals have been installed for NetHope's members, via Skylogic, in 18 different countries including Africa, the Middle East and South Asia. A small antenna and indoor D-STAR terminal at each site is connected, via satellite, to the Internet backbone using Skylogic's IP hub located at their teleport in Turin. This solution is available on six Eutelsat satellites, which provide extensive geographic coverage.

Edward Granger-Happ, CTO of Save the Children, a founding member of NetHope, said of the solution; "This agreement means more to Save the Children than just improving communications with our staff in some of the remotest areas of the world. The adoption of Eutelsat's solution means we are one step



closer to creating real and lasting change for many children who now live in communities with little or no access to modern communications technologies." Save the Children is a leading independent humanitarian organisation that works in 40 countries worldwide, including the United States.

Fighting fire with mobile communications

REDSAT provides a nomadic communications solution for firefighters

Selected by regional fire and relief services in France, REDSAT is a turnkey service developed by Satxpro. The service enables a complete communications network to be set up by one person in just 20 minutes, to connect regional fire-fighter central command and relief locations.

Easily transportable, the REDSAT system can be deployed on-ground or mounted

on a vehicle. It can be operated in extreme conditions and has high wind and storm resistance.

Based on Eutelsat's D-STAR product, the basic ground station can provide relief teams with telephone and fax connection to headquarters, and broadband Internet connectivity for e-mail and file exchange. The high-speed Internet connection



enables mobile command posts to access information such as maps and to simulate the propagation and direction of a fire, in order to pilot and synchronise on-site activity as efficiently as possible.

Satxpro has also developed extension modules for specific requirements such as monitoring from aircraft, telemetry and video transmission.

GT&T launches SVNO

New Satellite Virtual Network Operator service launched at CABSAT Dubai and SatCom Africa

Belgian telecommunications operator, Global TT (GT&T) is launching its new Satellite Virtual Network Operator (SVNO) at CABSAT, Dubai, and SatCom Africa, Johannesburg, this spring. This highly advanced web interface enables the company's resellers to act remotely on the GT&T teleport. Customised for each reseller, down to their own graphical chart, it enables them to act as a teleport operator for their clients, from managing subscriptions, to monitoring and full reporting.

In just over ten years, GT&T has become one of the principal operators of Internet services and telephony by satellite in Europe, the Middle East, central Asia and Africa. Today, GT&T serves more than 2500 end-user terminals, deployed by a network of distributors, via its own teleport located in Belgium.

"Currently, our installed base of terminals is growing at one VSAT every four hours," says Jean-Louis Garcia, CEO of Global TT. "Our growth has been particularly strong in the Middle East and Africa, and we have reinforced our capacity on two Eutelsat satellites, ATLANTIC BIRD™ 3, in C-band, and W6, in Ku-band, to accompany this progression."

GT&T's success is based on the added value they provide their distributors and clients. A private Web interface enables remote management of each VSAT terminal and visibility on its usage (subscriptions, protocols, volume). Prepaid Internet access, with username and password for PCs connected to the satellite modem, has also proved very successful, and the company has recently launched a new type of subscription, enabling modular connection tariffs between primetime and off-peak periods. Rather than being defined in advance, the different periods are indicated in real time on the user's screen.

The company has also put in place a new e-platform, allowing distributors and clients to directly top-up and reload their subscriptions 24 hours per day, without contacting their operator.



New horizons in sight

HSS brings advanced technology DVB-S2 to Middle East and Central Asia

Created in 2003, Horizon Satellite Services (HSS) has been providing customers in the Middle East, Asia and Africa with innovative satellite communication solutions for corporate networks, as well as access to tier-one Internet backbones. Today, HSS serves some of the region's largest businesses and Internet Service Providers in 40 different countries, in particular in Iran, Iraq and Lebanon.

To support its development, HSS has recently opened at its on-ground platform, hosted at the Stellar teleport in Germany, one of the first hubs to offer extensive coverage of the Middle East and central Asia using the latest and most advanced satellite transmission technique, DVB-S2.

Hisham Ansari, Horizon Satellite Services Managing Director commented; "With DVB-S2, we can use more advanced encoding techniques such as H.264 or VC-1, rather than being limited to MPEG-2 encoding. There is an incredible 30 per cent increase in efficiency with DVB-S2, compared with DVB-S, which results in greater value for our customers through speedy delivery in a much wider range of applications.

We have fully deployed this new service on Eutelsat's SESAT 2 and W5 satellites and our mid-term objective is to expand this advanced technology to the other Eutelsat satellites on which we operate capacity. In addition to increased efficiency for our IP services, which are our core business, this strategy will also boost our new Data and Video services by combining the functionality of DVB-S (for direct-to-home applications) and DVB-DSNG (for professional applications). In these markets, HSS delivers solutions for professional video networks, programmes exchanges and on-the-spot news reporting from fixed and nomadic units."

HSS has also recently increased its in-orbit resources, with a new contract for capacity on the W3A satellite, to extend its coverage in Sub-Saharan Africa. This service operates via a multiplex from Eutelsat's Rambouillet teleport near Paris, where HSS has installed its own equipment for encryption and encapsulation. Principal markets HSS is addressing on W3A include Mali, Ghana, Chad, Nigeria and Gambia.

over & OUT >>

HDTV: interview with an expert

Jacques Bajon, Senior Analyst at IDATE, answers the key questions about the dynamics of the HDTV market in Europe

What are the main factors driving the HDTV market in Europe?

As is to be expected, HDTV in Europe has begun predominantly as a pay-TV service, as in the USA. The principal factors driving this trend are that HD is an enhanced route to delivering premium content and can also be bundled into a compelling hybrid offer with other value-added services including VOD, PPV and PVR.

Other factors which are more related to competition could also help drive Europe's HD market. It could be a key differentiator for pay-TV operators in markets reaching a degree of maturity and facing fierce competition from emerging operators of IPTV services.

Are the growth prospects for HD in Europe encouraging?

There are unquestionable growth prospects in the HD market for subscription TV services. However, unlike the USA, where 90 per cent of homes subscribe to pay-TV (55% digital), the proportion in Europe is far lower (30% in France, 40% in the UK).

The prospective population for subscription-based HD is therefore smaller. Nor should we expect service providers of free TV to promote pay-TV or to frustrate the majority of viewers currently deprived of HD services by offering a service to which they have no access.

Is 'Free HD' an essential component for growth?

In order to enhance the exposure and consumption of HD programmes, alternative broadcasting platforms need to be found to provide free TV services. The rollout of free HDTV, with the impulse coming from commercial and generalist public channels, is the only way of enabling the widest possible audience to enjoy the benefits of this technological progress.

Since access to new terrestrial frequency spectrum is bound up with analogue switch-off, satellite networks could take on a central role to achieve this audience reach. Satellite-based networks do not have the same capacity constraints as terrestrial networks and are still the most efficient vehicle in terms of channel transport costs.

Satellites are also the ideal complement to DTT coverage, and could help to enhance the existing DTT offer with HD services. Between the two, in the most dynamic urban markets, IPTV could offer a hybrid model for gradual enhancement of the offering, at no extra cost to the subscriber.

When is 'free HDTV' likely to become a reality?

Free HDTV services in Europe's major markets could arise from 2008, with the implementation

of satellite offers and the introduction of HD services by generalist channels. However, the question of the additional costs bound up with the rollout of an HD offering, and the 'who and what' is involved (a consortium in charge of the service, ordering of set-top boxes etc.) needs to be addressed. A broad mass market can ultimately only be achieved via the DTT network, which is not before 2010 at the earliest.

What is the current status of HDTV channels across Europe?

At the end of 2006 there were approximately 40 HDTV channels broadcasting in Europe, principally offered by pay-TV operators in the UK, France, Germany and Italy. In parallel to this expected take-up in western Europe, Poland and Turkey have emerged as earlier than expected adopters of HD. The number of channels will dramatically increase in the coming years as pay-TV platforms strengthen their HD line up, major public service broadcasters and commercial channels launch HD versions of their Standard Digital channels in simulcast, and as new countries including Spain and "mid-size" European markets enter the HDTV landscape. With these combined factors, HDTV channels in Europe could double to over 100 by 2010.

Interview based on IDATE multiclient report: 'HDTV, ready for the take-off?'