



## Eutelsat Press Kit

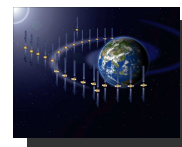
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Since the first legendary broadcast in 1965 between North America and Europe, satellites have become synonymous with instantaneous delivery of video, audio and data to users around the world. Whether for contribution links connecting two points of the globe, or for distribution to homes and enterprises across nations and continents, satellites remain the most efficient technology for providing ubiquitous coverage direct to users and other relay networks.

As communications technologies move increasingly into a digital era populated by broadband services for enterprises and consumers, video on displays at retail outlets, in the home and on 3G handsets, satellites are placed to play their role in delivering content to screens of all sizes, both fixed and mobile.

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## **Eutelsat – 25 years of satellite communications ...**

Through capacity commercialised on 23 satellites able to reach up 90 per cent of the global population Eutelsat is one of the world's leading satellite operators.

Our satellites serve landbased, maritime and in-flight communications requirements. They are used for video broadcasting to cable and satellite homes, satellite newsgathering and programme exchanges. They also serve needs for IP multicasting, broadband access, corporate data networks, as well as fixed and mobile communications and positioning services.

Our company focus is on providing users with the highest quality of service through in-orbit security and market expertise. To achieve our goals we have built satellite neighbourhoods, on-ground infrastructure and distributor networks that enable immediate response to the needs of users whose profiles range from pay-TV platforms to small businesses and government agencies.

Headquartered in Paris and with a workforce of 450 professionals from 25 countries, Eutelsat operates marketing and sales offices in Germany Italy, Poland, the UK and the USA, as well as a broadband affiliate in Italy called Skylogic. Eutelsat also owns and operates teleports in France and Italy that supply in-orbit satellite control, value-added and hosting services.

## Some Operating Facts

- Capacity commercialised on 23 satellites (18 fully owned by Eutelsat)
- Satellites located at 17 positions in geostationary orbit from 15 degrees West to 70.5 degrees East
- Market presence in Europe, Africa, Asia, the Americas
- Broadcasting 1,500 television channels in 45 languages
- Broadcasting 800 radio stations in 40 languages
- Serving pay-TV platforms in Africa, France, Italy, Indian Ocean islands, Poland, Russia, Turkey, UK ...
- Broadcasting to 120 million cable and satellite homes in Europe, North Africa, Middle East
- Fully-owned teleports in France and Italy serving Europe, Africa, Asia, the Americas
- Land, maritime and commercial in-flight broadband services
- 850 corporate networks in 80 countries
- Workforce of 450 men and women from 25 countries
- Two satellites in construction (HOT BIRD™ 7A, HOT BIRD™ 8)

## Some Financial Facts (2003/2004 financial year)

- Consolidated revenue €760.2 million
- Consolidated EBITDA margin 78.8%
- Consolidated net income €269.8 million

## Subsidiaries

Eutelsat do Brasil (South and central America)

Eutelsat GmbH (Germany, Austria, Switzerland)

Eutelsat Inc. (North America)

Eutelsat Polska (Poland)

Eutelsat Ltd (UK, Ireland)

Skylogic – broadband subsidiary, headquartered in Turin (Italy)

## Portfolio of Services

<b>Video Applications</b>	<b>Professional Data Networks</b>	<b>Broadband Services</b>
Direct broadcasting of TV and radio	Private networks	IP backbone connectivity
Cable distribution	Data broadcasting	Broadband access
TV contribution links	Business TV, videoconferencing	Virtual Private Networks
Programme exchanges, satellite newsgathering	Mobile services (messaging, positioning)	Multicasting and IP content distribution



## **Video Applications**

### **Key facts**

- Eutelsat broadcasts 1,500 TV channels and 800 radio stations through key video neighbourhoods, notably HOT BIRD™ and EUROBIRD™ 1.
- Leading pay-TV platforms using Eutelsat include BskyB, Canal Satellite Réunion, Cyfra Plus, DigiTurk, MultiChoice Africa, Sky Italia, TPS.
- The audience of homes receiving channels through the HOT BIRD™ neighbourhood and EUROBIRD™ 1 exceeds 120 million, representing 80% of cable and satellite homes in Europe, North Africa, the Middle East.
- Eutelsat co-founded the HD Forum in France in 2004 to prepare for the introduction of high-definition television in Europe.

### **Strategic competitive advantages and prime video neighbourhoods ...**

Video applications represent 60 per cent of capacity used by geostationary satellites worldwide. This activity continues to benefit from the move to digital, which has generated massive growth in television channels including pay-television which now serves 60 million subscribers worldwide. A maturing standard digital television market is now introducing high-definition content with satellite as the primary delivery platform.

Nearly 70 per cent of Eutelsat's consolidated revenues for the last financial year (to June 2004) were generated by video applications. This activity breaks down into three main segments: direct-to-home (DTH) and cable broadcasting, contribution services and professional video networks.

From 13 degrees East, home to five HOT BIRD™ satellites, Eutelsat has built a premium video neighbourhood chosen by over 800 television channels and 530 radio stations and reaching 110 million TV homes in Europe, North Africa and the Middle East. Two new HOT BIRD™ satellites (7A and 8) will be launched end 2005 and first quarter 2006 to replace existing HOT BIRD™ capacity at 13 degrees East and raise in-orbit sparing.

Other video neighbourhoods have been developed for Africa (W4/SESAT 1), Russia (W4), Turkey (W3A) and the Balkans (W2).

Eutelsat operates a subsidiary in Germany called visAvision, which packages and distributes digital television in foreign languages to German cable networks in regions with a high density of foreign inhabitants.

### **From 50 TV channels to 1,500 channels in 10 years**

In the 1980s Eutelsat was the first satellite operator in Europe to provide capacity for direct reception of television channels. The mid 1990s marked the launch of digital television for which the company built the HOT BIRD™ family of high-power broadcast satellites. From 50 channels in 1995, Eutelsat's satellites in 2005 are now broadcasting 1,500 channels including general entertainment, regional, cultural and community content. Nine per cent of content is interactive.

### **The power to deliver content to 42 inch plasma screens and mobile phones**

Today, the worlds of broadcasting, telecommunications and IT are driven by the shared objective to attract consumers watching the TV in their front room, working at their PC and consulting information on screens in the supermarket queue or at the hairdressers. Content is being accessed and viewed on screens 42 inches across and on mobile phones 40 times smaller.

Satellite remains the most flexible tool to serve these multiple fixed and mobile devices. In addition to providing ubiquitous coverage, satellites can distribute content of all types through varying bandwidth solutions and can broadcast or multicast to any number of users. These assets place satellite technology in a privileged position for TV broadcasting, video-on-demand, multicasting to mobile handsets or content delivery to Wi-Fi hotspots on boats, trains and aircraft.

### **HDTV – a new vector for growth**

Eutelsat estimates that more than 100 channels will be broadcasting in HDTV within the coming five to six-year timeframe. Up to 10 channels are expected to be up and running by the end of 2006, driven by compelling content provided through events such as the Winter Olympics Italy in February and the World Cup Football in Germany from June to July. Satellite, which can transparently manage broadcasts in MPEG2 or MPEG4, is the technology that will support the roll-out of HDTV in Europe. Eutelsat is already collaborating with anchor broadcasters such as TPS for the launch of their first commercial channels from 2005, and is a founding member of HD groups in France and Italy that have assembled content providers, electronics manufacturers, retailers and operators in order to effectively coordinate all setps of the broadcasting chain.

## **European leader in professional video networks**

Eutelsat has increasingly strengthened its position in professional video networks in Europe, where it is the longstanding market leader, and steadily expanded coverage to serve requirements in Africa and Asia.

The EBU, a longstanding client for programme exchanges, is a key capacity user. Its Eurovision permanent network of 50 digital channels on W3A and W1 relay 105,000 transmissions per year (including 30,000 news items and 12,000 hours of sports and cultural programmes) to a potential audience of 640 million viewers. In radio, two satellite channels relay 2500 concerts and operas, 440 sports fixtures and 120 major news events every year to a potential audience of 400 million listeners. Other broadcasters and news agencies also lease capacity for news, sports and cultural events.



## Professional Data Networks and Broadband Services

### Key facts

- In parallel to consolidating core coverage of Europe Eutelsat has steadily increased reach in order to expand service to telco and broadband clients in Africa, Asia, the Americas.
- Eutelsat's 2-way D-STAR service enables fully satellite-based broadband networks to be set up for local communities, businesses and government agencies. and can be coupled with Wi-Fi for wireless local access.
- Eutelsat's D-SAT service for fully meshed networks offers dynamically-allocated bandwidth billed on a pay-per-use basis for land and maritime applications.
- Capacity on SESAT 1 serves Connexion by Boeing for in-flight connectivity on transatlantic flights between Europe and North America.
- Skylogic, Eutelsat's broadband affiliate provides broadband service to users in Europe, Africa, Asia and the Americas through teleports in France and Italy.

Demand for satellite-based professional data services is driven by the communications requirements of companies operating in financial, energy, retail and manufacturing sectors. These include multinationals such as Ferrari, Volkswagen, General Motors, Auchan, Total Fina Elf, Atos Euronext, AFP, Reuters etc ...

Networks are principally configured for point-to-multipoint communication using proprietary technology. They are operated by service providers who include AT&T, BT, Belgacom, Hughes Network Systems, Orascom and Telespazio who create customised solutions adapted to user requirements through Eutelsat satellite capacity. Driver applications are intranet or extranet networks, videoconferencing, real-time multicasting of financial information, credit card authorisations and extension of GSM networks.

Eutelsat has steadily expanded coverage provided for professional data networks beyond Europe into Africa, Asia and the Americas. The company has also continued to innovate with new services such as SKYPLEX Data, which associates Ka-band frequencies and on-board processing for PC-supported cooperative work. SKYPLEX Data is particularly suited for secure heavy file transfer and was selected on this basis by Renault F1 to interconnect its own sites and key suppliers.

## **Mobile services for specialist markets**

With 25,000 mobile terminals operating in Europe, EutelTRACS is an established messaging and positioning service for the road-haulage industry. Operated in collaboration with Qualcomm, EutelTRACS is provided through Eutelsat's SESAT 1 satellite which serves Europe, North Africa, the Middle East and western Siberia. The service is mainly used by road-haulage companies for tracking vehicles and optimising itineraries and loads.

EMSAT provides voice and fax communication, low-speed data transmission and positioning services. In addition to monitoring pipelines as far as the Caucasus, EMSAT serves the Vessel Monitoring System (VMS) that provides EU member countries with data on position, direction and speed of fishing boats.

## **Satellite broadband access in complement to terrestrial networks ...**

Demand for satellite-based broadband services is driven by corporates, local communities and government agencies located in regions where traditional terrestrial infrastructure is insufficient, congested, partially or totally deactivated. Telcos and service providers such as Belgacom, GlobeCast, Redwing and Orascom also use satellite for Internet backbone connectivity in Africa, the Middle East and Asia.

D-Star, Eutelsat's turnkey broadband solution is commercialised through a network of sales channel partners by its broadband affiliate Skylogic, and provided through teleports in France and Italy, which have access to Internet Exchange Points in Paris and Turin and offer IP connectivity from the Atlantic to the Pacific. D-Star is entirely independent of terrestrial infrastructure and facilitates fast connections between multiple sites for Virtual Private Networks (VPNs), Voice over IP, video broadcasting and Internet access. It can also relay to and from Wi-Fi hot spots for local wireless broadband access.

Service providers, including Hughes Network Systems, Emperion, IABG and Aramiska also use Eutelsat capacity to service clients through their own multimedia platforms.

Eutelsat's D-SAT service uses dynamically allocated capacity billed on a pay-per-use basis. D-SAT terminals installed on cruise ships, ice breakers and oil platforms are used for Internet access, voice/data and videoconferencing communications for applications such as telemedicine. Connections are based on the principle of private meshed networks and are managed entirely by Eutelsat.

Eutelsat's teleports in France and Italy are also equipped to multicast DVB/IP content for applications such as point-of-sale television, catalogue updates and e-learning programmes for oil companies, airlines, congress centres, hotels and high-street retailers. The teleports provide a common facility for storage, signal processing, multiplexing and uplinking and also host service integrators including Avanti, Castify Networks, Netinsat and TLV.

## The Satellite System

Eutelsat commercialises capacity on 23 satellites located in geostationary orbit between 15 degrees West and 70.5 degrees East. Satellite control and operations of the company's fully-owned satellites is managed through its teleport in Rambouillet (France) which is also fully equipped to service post-launch satellite manoeuvres.

Satellite	Location	Regions served	Launch Date
<b>STABLE ORBIT</b>			
HOT BIRD™ 1	13° East	Europe, North Africa, Middle East	March 1995
HOT BIRD™ 2	13° East	Europe, North Africa, Middle East	Nov. 1996
HOT BIRD™ 3	13° East	Europe, North Africa, Middle East	Sept. 1997
HOT BIRD™ 4	13° East	Europe, North Africa, Middle East,	Feb. 1998
HOT BIRD™ 6	13° East	Europe, North Africa, Middle East,	August 2002
EUROBIRD™ 1	28.5° East	Europe	March 2001
EUROBIRD™ 2	25.5° East	Europe, North Africa, Middle East	Oct. 1998
EUROBIRD™ 3	33° East	Europe	Sept. 2003
W1	10° East	Europe, Middle East, Africa	Sept. 2000
W2	16° East	Europe, Middle East, Africa	Oct. 1998
W3A	7° East	Europe, Middle East, Africa	March 2004
W6	21.5° East	Europe, Middle East, Africa	Apr. 1999
W4	36° East	Africa, Russia	May 2000
W5	70.5° East	Europe, Middle East, Asia, Australia	Nov. 2002
SESAT 1	36° East	Europe, North Africa, Middle East, Asia	Apr. 2000
ATLANTIC BIRD™ 2	8° West	Europe, Middle East, Americas	Sep. 2001
ATLANTIC BIRD™ 3	5° West	Europe, Americas, Africa	Jul. 2 002
<b>INCLINED ORBIT</b>			
EUTELSAT II-F2	48° East	Europe, North Africa, Middle East	Jan. 1991

<b>UPCOMING LAUNCHES</b>			
HOT BIRD™ 7A	13°East	Europe, North Africa, Middle East	2005
HOT BIRD™ 8	13°East	Europe, North Africa, Middle East,	2006
<b>CAPACITY ON THIRD-PARTY SATELLITES</b>			
ATLANTIC BIRD™ 1	12.5°West	Europe, Middle East, Americas	Aug. 2002
Telecom 2D	8°West	Europe	Aug. 1996
Telstar 12	15°West	Europe, Americas	Oct. 1999
Express A3	11°West	Europe, North Africa, Middle East	Jun. 2000
SESAT 2	53°East	Europe, North Africa, Middle East, Asia	Dec. 2003