

SES GLOBAL



Your Satellite Connection to the World

# Local & Regional Advertising over satellite

## Technological aspect



# Agenda

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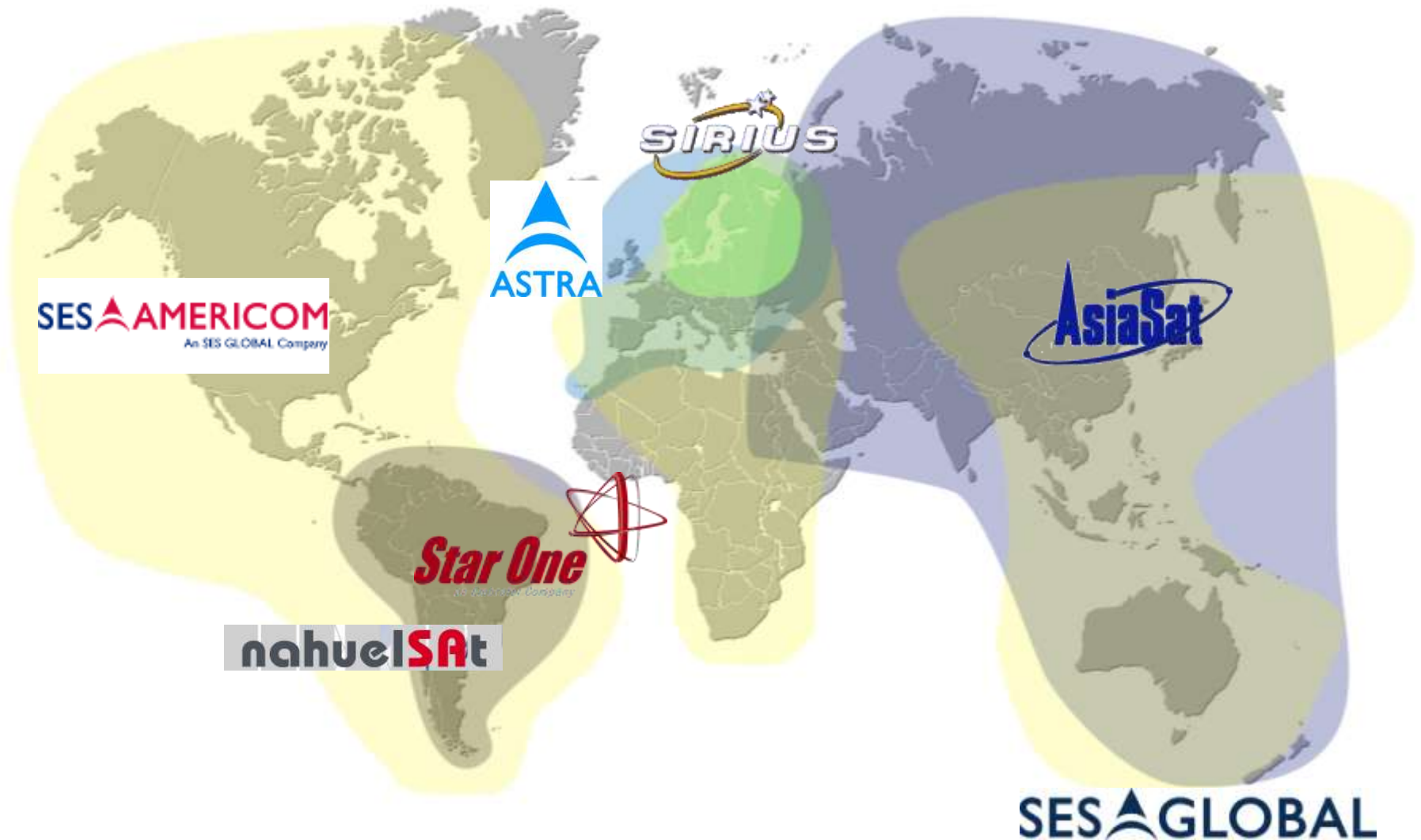
- ◆ **A few words on SES GLOBAL & SES ASTRA**
- ◆ **Market figures for Europe**
- ◆ **Digital enhanced TV**
- ◆ **Digital interactive TV**
- ◆ **TV over IP – the ASTRA-NET Platform**
- ◆ **BBI project and NBI project**
- ◆ **Luxsat project : a demonstration of efficiency**

# SES Global : a few words

- ◆ A leading international satellite operator with a global fleet of 42 GEO satellites
- ◆ Born out of the combination of SES ASTRA and SES Americom
- ◆ Core DTH market in Europe, with a presence in some 91 million households
- ◆ Leading position in US cable head-end broadcasting serving approximately 80 million cable households
- ◆ Tradition of technological innovation



# SES GLOBAL - geographical coverage



# The SES GLOBAL fleet



# SES ASTRA

An SES GLOBAL Company



# Pay-TV & FTA

## In analog and digital for TV & Radio



- ◆ More than 1100 audio-visual services :
  - ➔ 13 satellites
  - ➔ 3 orbital slots : 19.2°, 23.5° et 28.2° East
- ◆ 33.7 million DTH/SMATV – 56.8 million cable
- ◆ No direct commercial relationship with end-users
- ◆ No implication into content

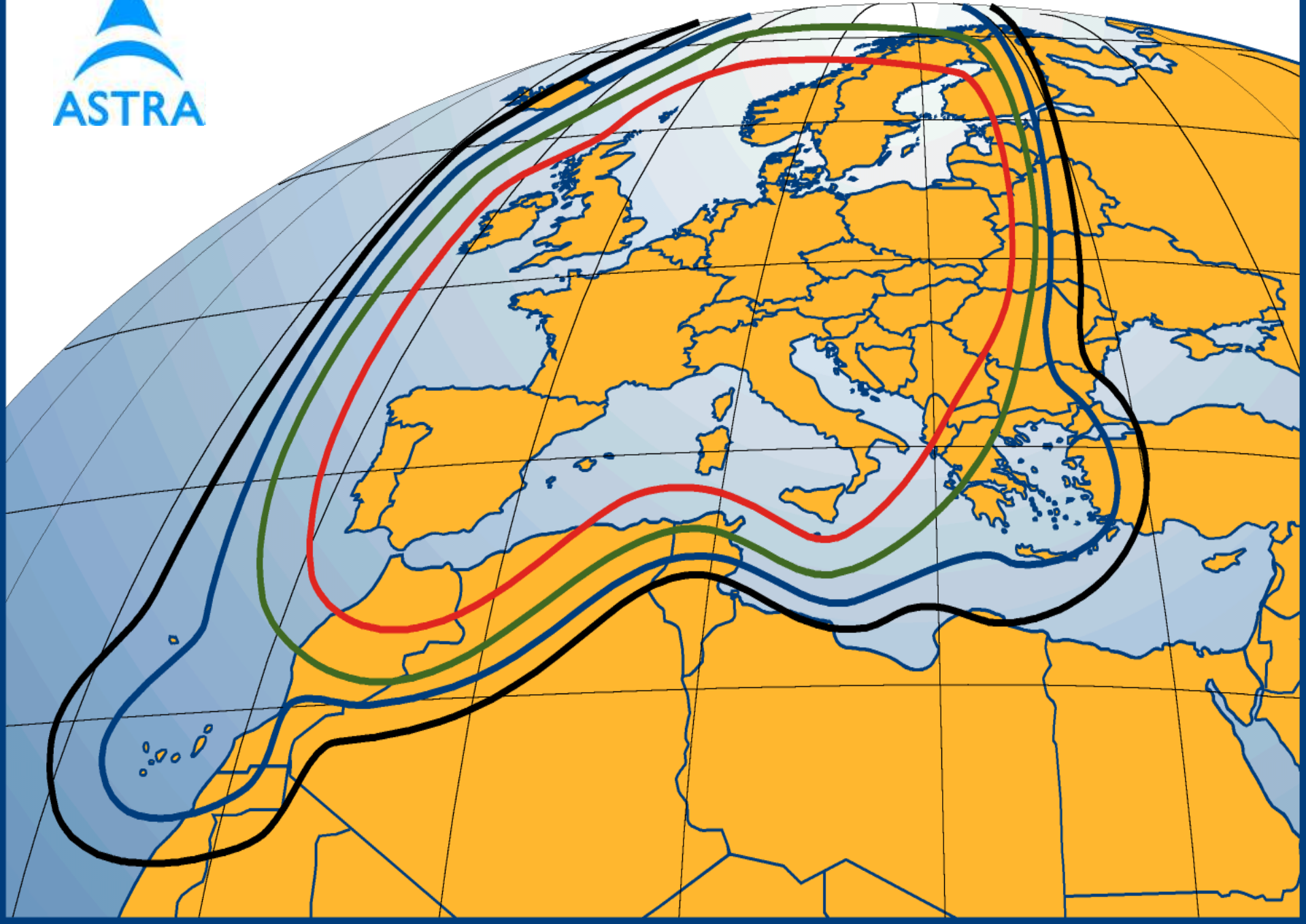


# Partnerships with leading broadcasters



Country	Customers
UK and Ireland	BSkyB, BBC, ITV, Telewest (Flextech)...
Germany	Kirch Gruppe, RTL Group, Pro Sieben, all public and private broadcasters ...
France	CANAL+ / CANALSATELLITE
Spain	Sogecable
The Netherlands	Canal+, NOS ...
Poland	UPC
US	AOL-Time Warner, Viacom, Bloomberg

**Most contracts on a ten year basis**



Local / Regional vs Satellite

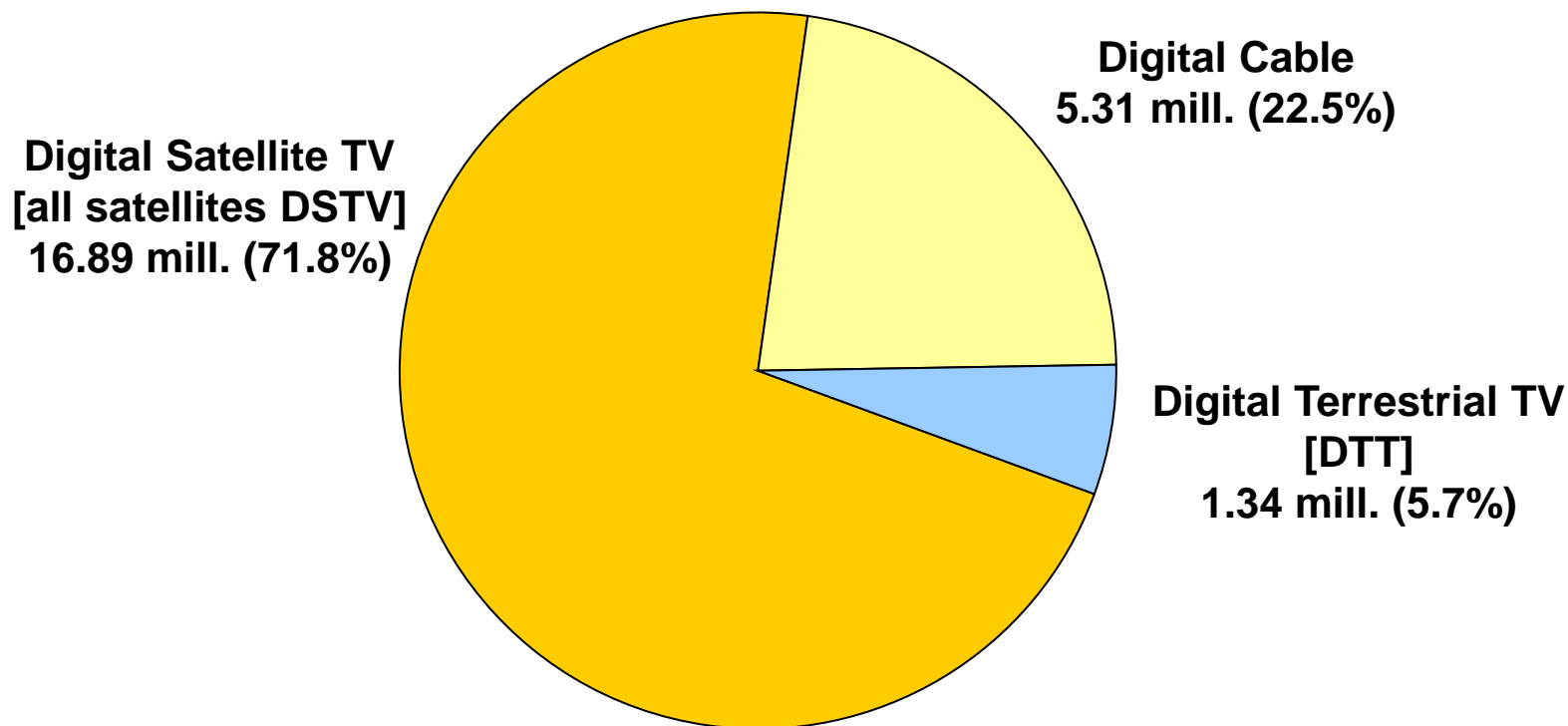
? antinomic ?

# Digital TV over satellite

A fast growing market



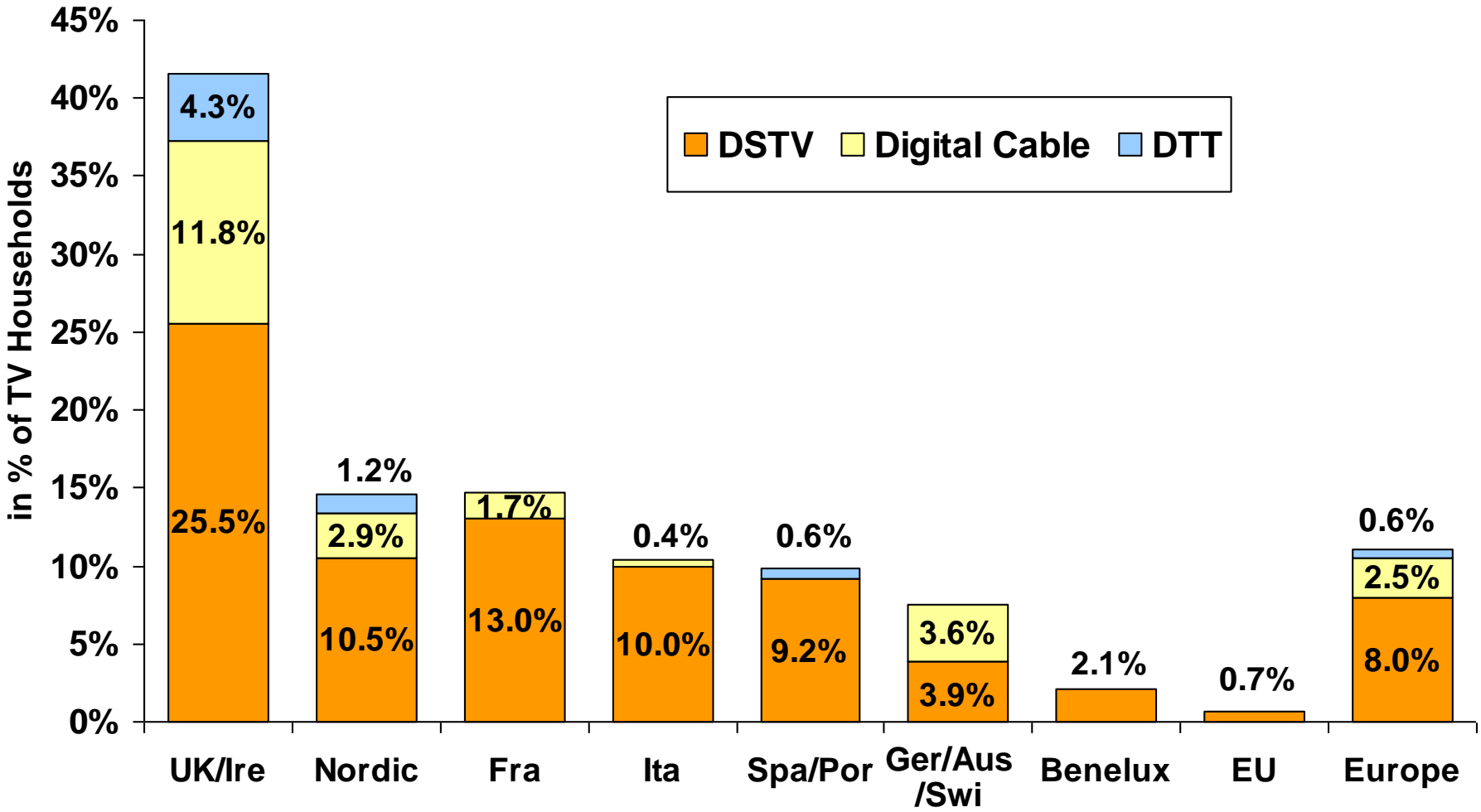
# Digital TV market in Europe\* (YE 2001)



Base: 23.53 Mill. Digital TV Households

Source: SES/ASTRA, Satellite Monitors

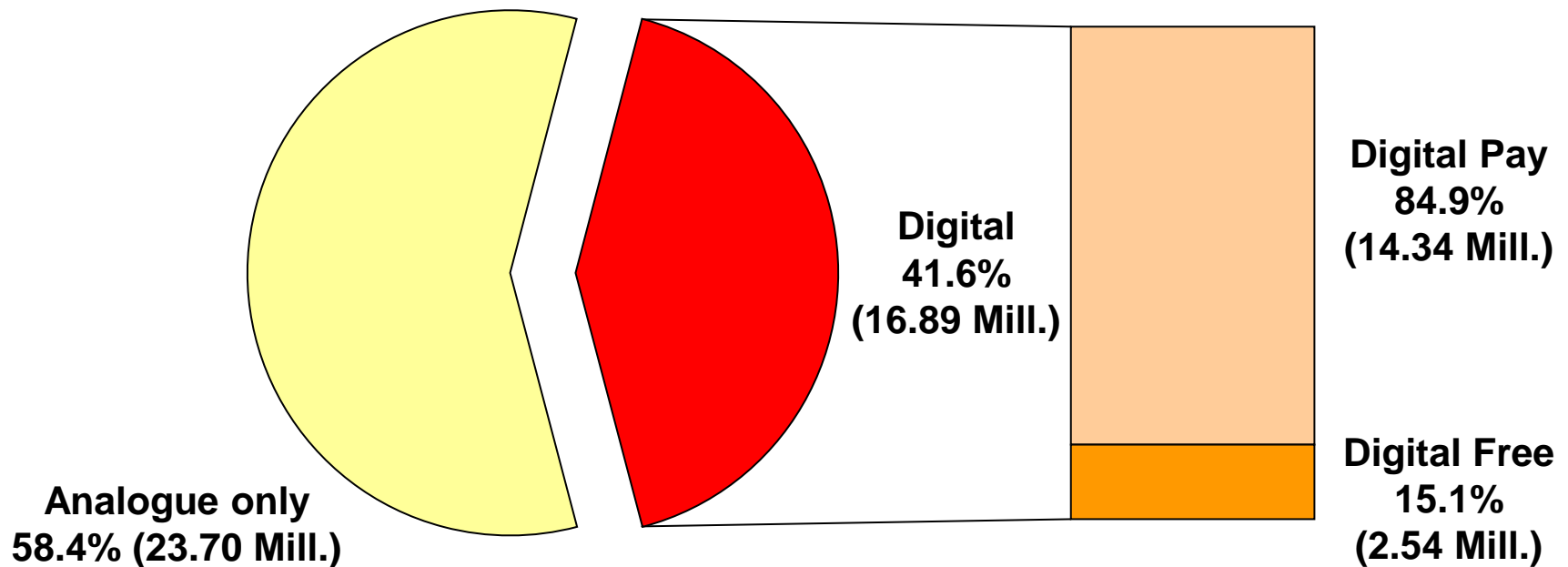
# Digital TV by European countries - YE 2001



Base: TV Households  
 Source: SES/ASTRA, Satellite Monitors

# Digital Satellite Homes in Europe\*

## Year End 2001

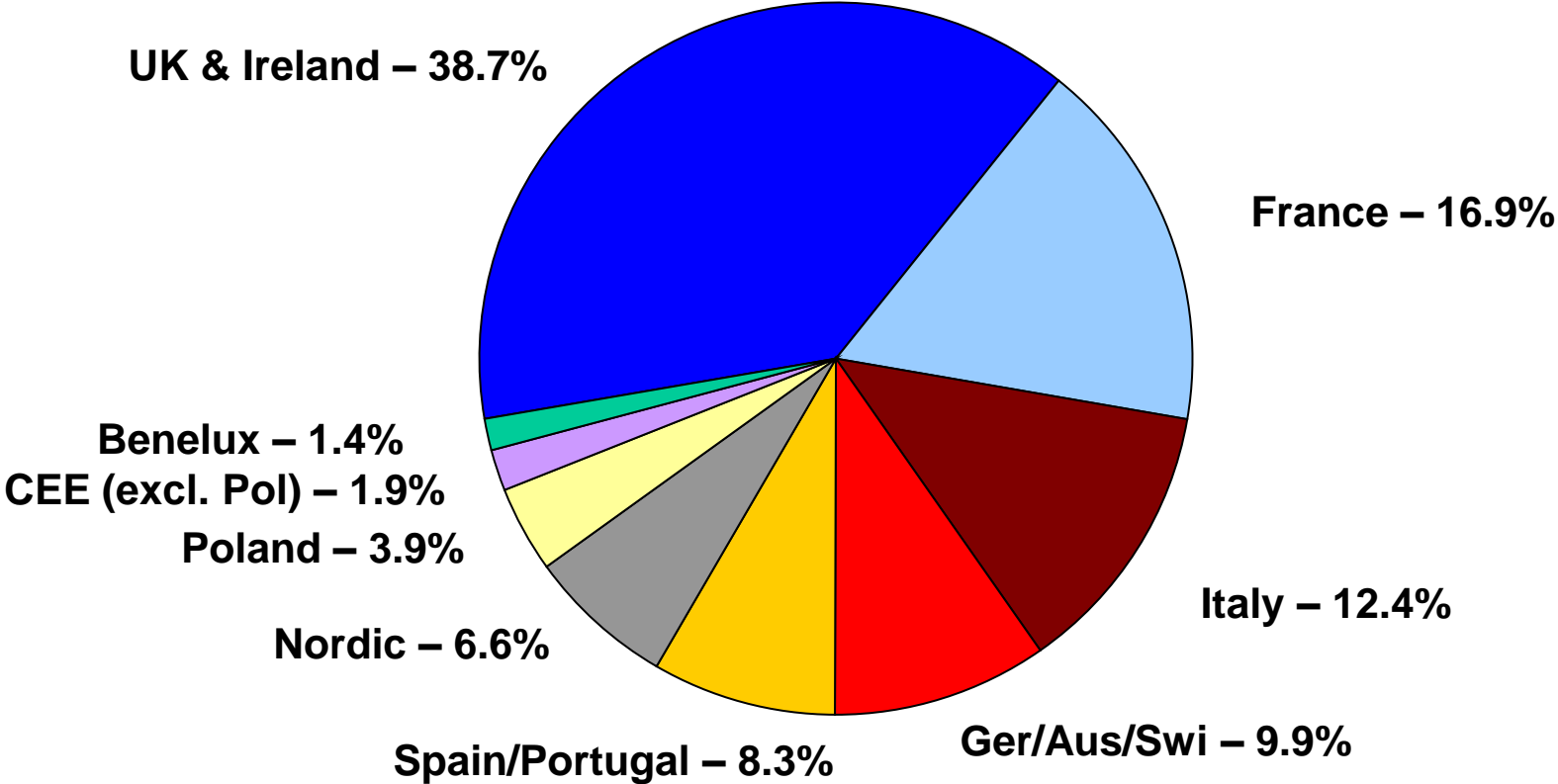


Base: 40.59 Mill. DTHSMATV Households (all satellites)

\* 30 European countries within ASTRA footprint

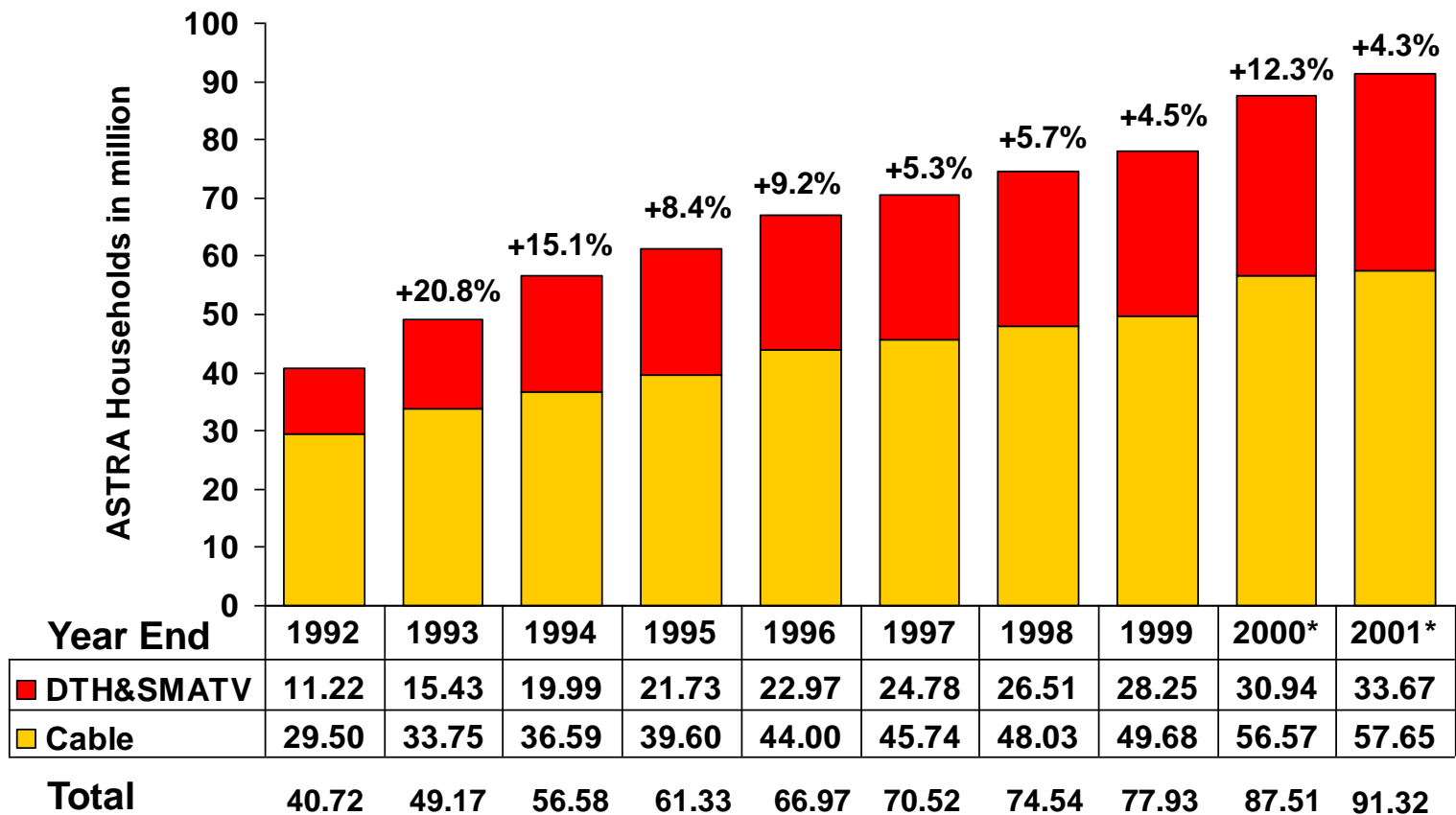
Source: SES/ASTRA, Satellite Monitors

# Location of DSTV Households in Europe (YE01)



Base: 16.89 Mill. Digital Satellite Households  
\* 30 European countries within ASTRA footprint  
Source: SES/ASTRA, Satellite Monitors

# ASTRA Coverage in Europe



Sources: SES/ASTRA, Satellite Monitors



**Pay TV using ASTRA**

# Free-to-air Digital TV and Radio



More than 80 digital TV channels  
and about 130 digital radio channels are  
free-to-air services on ASTRA :

**Sports...**



# Free-to-air Digital TV and Radio



... general entertainment and occasional sports...



# Free-to-air Digital TV and Radio



...thematic (automotive)...

*MOTORS*



# Free-to-air Digital TV and Radio



...music...



# Free-to-air Digital TV and Radio



...news...



Bloomberg



# Free-to-air Digital TV and Radio



...international, independents  
and others...



# Free-to-air Digital TV and Radio



...and about 130 digital  
radios



# Enhanced TV

- Give TV viewers the possibility to access more services
  - EPG
  - Mosaïcs
  - Weather information
  - etc.
- Enhanced TV is often « passive »
  - No need for a telefon line
  - The remote control is sufficient



# Interactive TV

- Telebanking
- e-mail
- SMS
- Games
- Bets



- Interactive TV often « active »
  - requires a telefon line

# Advertising with digital TV

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- Enhanced TV allows advertisement which is not in the video flow
- Interactive TV allows more for the advertisers, but :
  - How many IRDs are connected to the telefon line ?
  - How many interactivity models on the market ?
    - MEDIAHIGHWAY
    - OPEN TV
    - OPEN
    - Etc.
- The introduction of new generations of IRDs will allow much more, by using hard drive disks capacities (Sky Digital, CANAL+, TPS)



# Global broadband communications system



## Global broadband services



# SES ASTRA

An SES GLOBAL Company

IP multicasting  
one-way & two-way



# ASTRA-NET, initiated in 1998, proposes three types of IP/DVB services



- ✓ *Multicast File Delivery*: High-speed delivery of signals up to 6.5 Mbit/s (secure transfer of files) (e.g. infocast in France)
- ✓ *Streaming Multicast*: Always-on or on-demand connection to distribute video, audio and data (64 kbps – 6.5 Mbit/s) more professional
- ✓ *High-Speed Internet*: www access services (Germany, Italy)

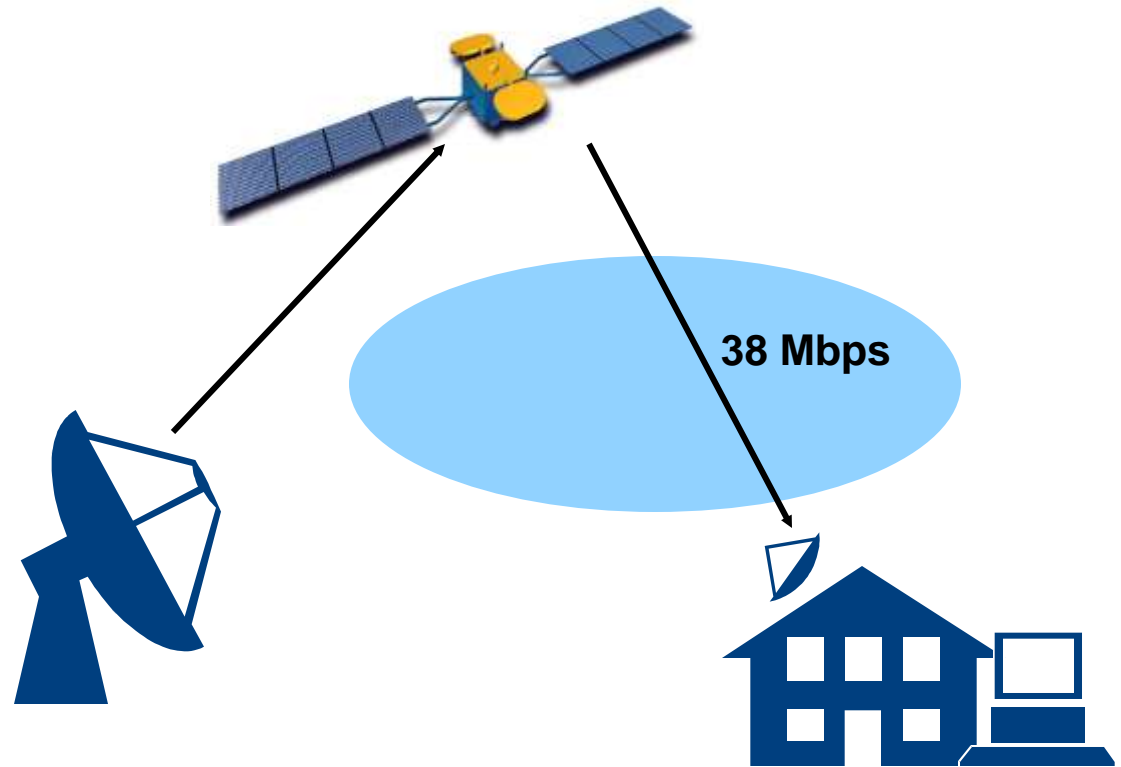
These services are *one-way* with a terrestrial return path



# Positioning in the Broadband Market

## ASTRA-NET: One-way multimedia distribution

- High speed broadband distribution
- **Fully addressable**
- **Point to multipoint**
- Open platform, based on existing standards (DVB, IP)
- Set to create a de-facto multimedia network standard



Return path: PSTN or ISDN

## **In France, @Sky (founded in 2000)**

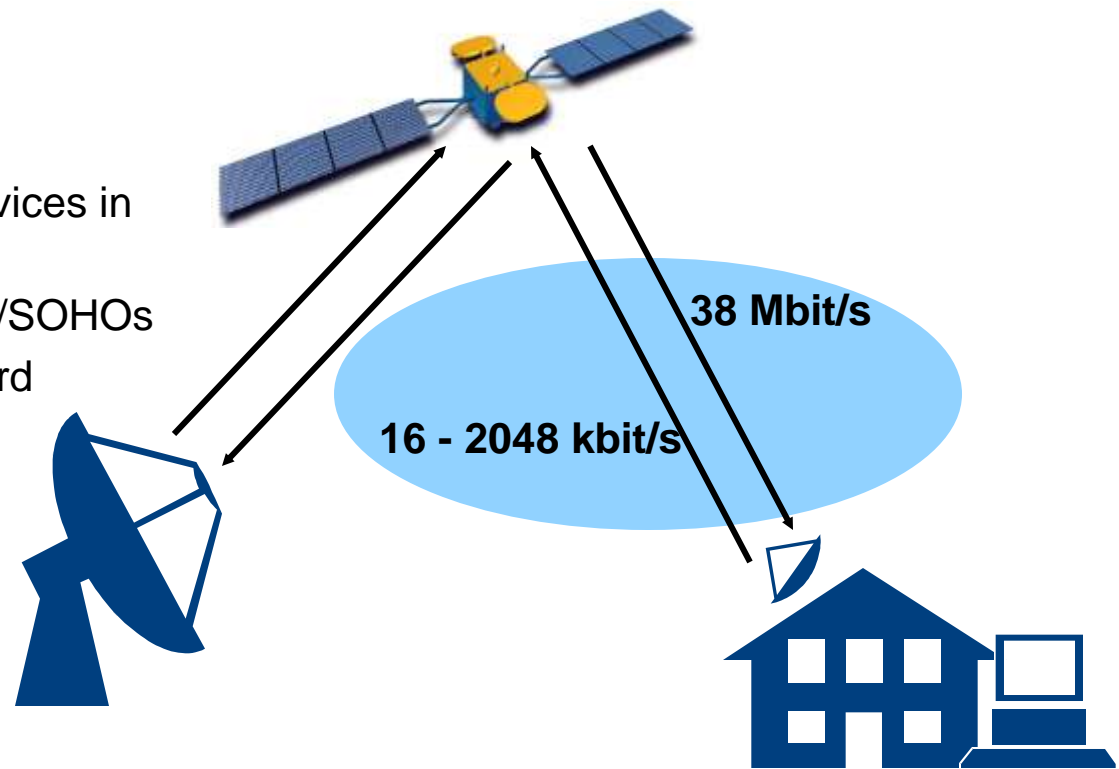
- Convergence concept
- Transforming PC in Video M@chine
- Access to satellite bouquets broadcast in digital TV quality
- Recording TV et Radio programmes on hard disk
- Burning best programmes on CD-ROM
- Look at content on DVD

# Positioning in the Broadband Market



## BBI: Two-way multimedia distribution

- Leader in the field of two-way broadband satellite network services in Europe
- End-users: Residentials & SME/SOHOs
- Based on the DVB-RCS standard
- BBI customers:
  - broadcasters
  - Telecom operators
  - ISPs
  - SMEs/SOHOs



**Two-way services for residential and corporate users**



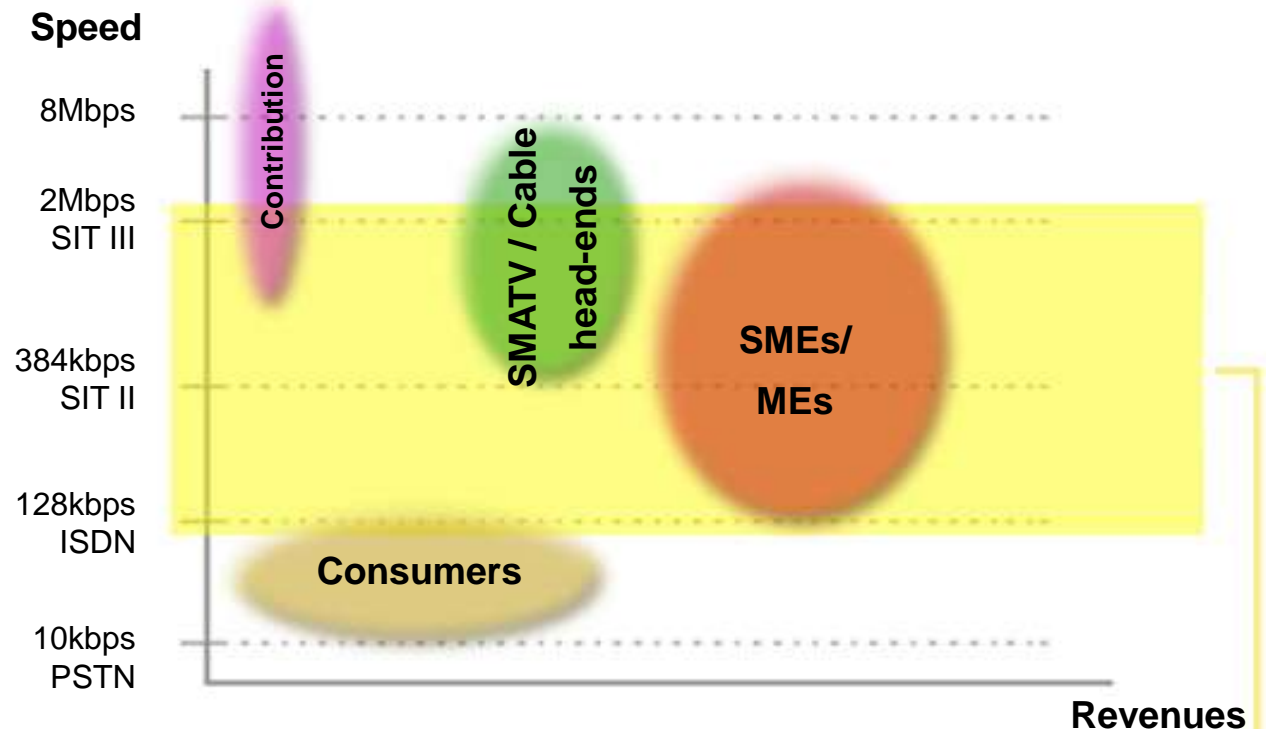
# Major BBI Contracts / Advanced Leads

- ✓ In *Spain* with NEO / SKN
  - Mainly Internet access
  - 1000 enterprise/SME sites for internet access for 2002
  - Demo conducted 10/2001, pilot during Q1, 2002
  - Contract discussions in progress
  
- ✓ In *France* with La Poste & Local Authorities
  - content distribution of files or IP streams
  - Internet access
  - Up to 1500 interactive broadband kiosks
  - Demos conducted End 2001
  - First contract approved in March 2002
  - Introduction in august 2002

# Broadband Interactive System (BBI)



## 2-way Marget Segmentation





### BBI potential:

- Simultaneous shared access market
- Contribution feeds

# Narrowband interactive would be enough for TV viewers



## Solves the terrestrial connection :

-  transparent for the end user
-  revenues are for the operators, not for telcos

## Open-standards DVB/IP platform for service providers:

-  Immediate implementation
-  Independence from local telephone operator

## NBI project : a new way for efficient advertisement :

-  Immediate implementation
-  Independence from local telephone operator

# Demonstration

# Thank you

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