

A satellite with two long solar panel arrays is shown in space, orbiting Earth. The Earth's blue and white horizon is visible on the left side of the frame. The background is a dark field of stars.

# EUTELSAT IN THE BROADCAST SERVICES

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# EUTELSAT IN THE VIDEO MARKET

- > 120 million (satellite) DTH homes served from 6 premium video neighbourhood
- ... in addition to + 80 M cables homes viewing Eutelsat carried TV channels

- > 5000 TV Channels
  - 2860 encrypted
  - 1800 free to air channels
- > 500 HD channels

- Market leader in Europe, Russia, Middle East and Africa
- 40 premium TV platforms
- Worldwide coverage

- Experience in building DTH hotspots
- Pioneer in Ultra HD broadcasting
- Innovator in full-satellite triple-play solutions

# EUTELSAT OFFERS A SUPERIOR WORLDWIDE COVERAGE FOR DTH

**Leading position  
in Europe**

**Leading position in Russia and  
Ukraine, with biggest hotspot**

**Future  
Hotspot in  
Asia  
Pacific**

**Leading position in  
Sub Saharan Africa  
with 3 hotspots**

**Leading position in  
Middle East North Africa  
with capacity on all the Hotspots  
of the region (shared with other  
actors)**

**On going  
development  
in the Americas**  
with the acquisition  
of Satmex and  
further rollout  
of Alterna TV platform

# 40 PREMIUM PLATFORMS BROADCAST VIA EUTELSAT

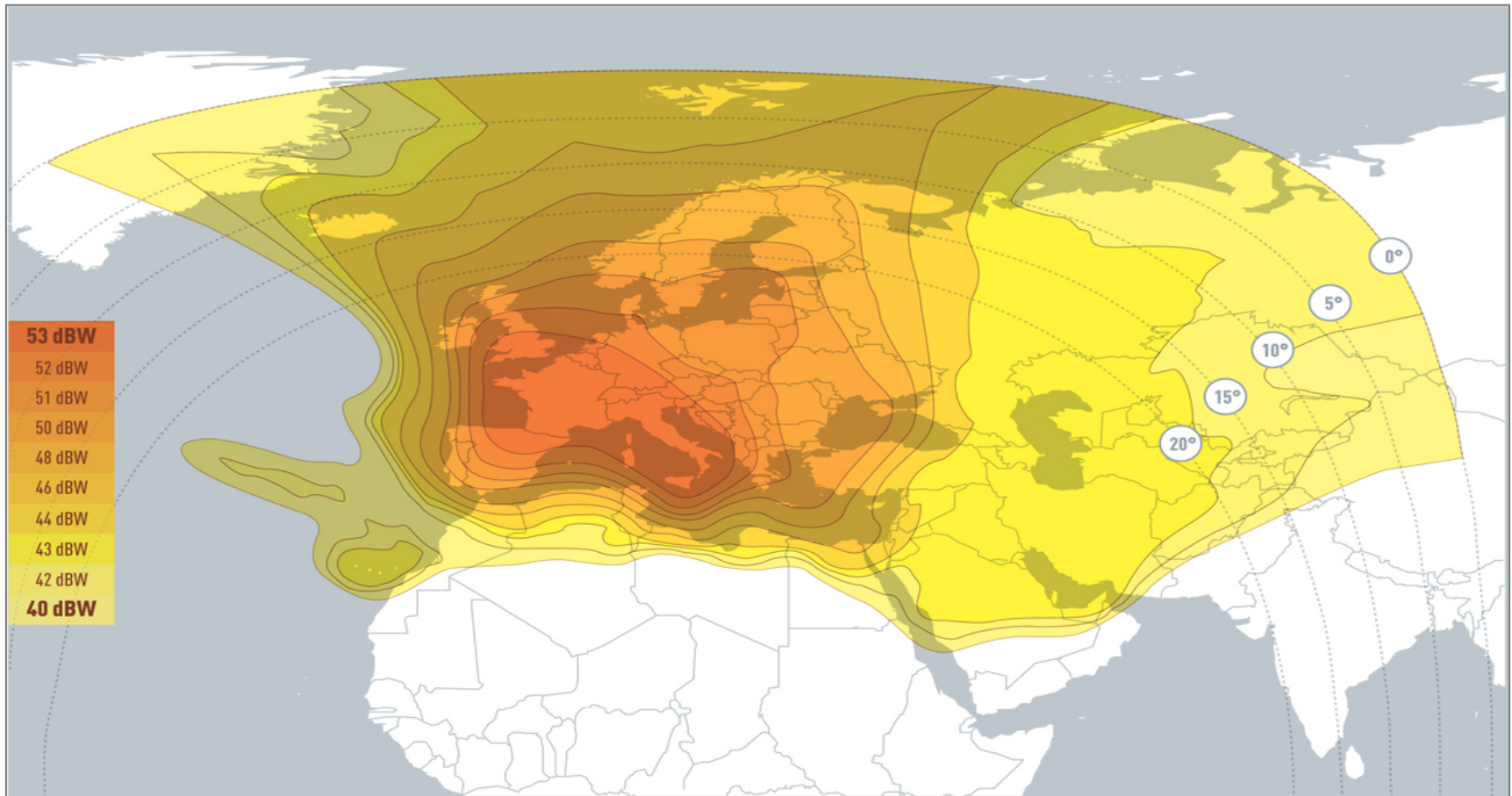
- ✓ **Broadcasting over 40 anchor pay-TV platforms** in mature and emerging markets in Europe, Middle East, Africa
- ✓ Satellite TV platforms complementing DTT networks
- ✓ **HD acceleration:** forecast by 2020 to represent 20% of satellite TV channels worldwide\*
- ✓ **New satellites designed for dynamically-expanding markets including Russia, Africa, Latin America**



A key partner of market-leading pay-TV platforms

# HOTBIRD AT 13° EAST FOR EUROPE, NORTH AFRICA AND THE MIDDLE EAST

Household reach in Europe and MENA via HOTBIRD:  
More than **120 million homes** in Europe and  
more than **27 million homes** in MENA





# KEY PLATFORMS VIA EUTELSAT 13° EAST

All data in '000

## Pay TV Platforms (8)



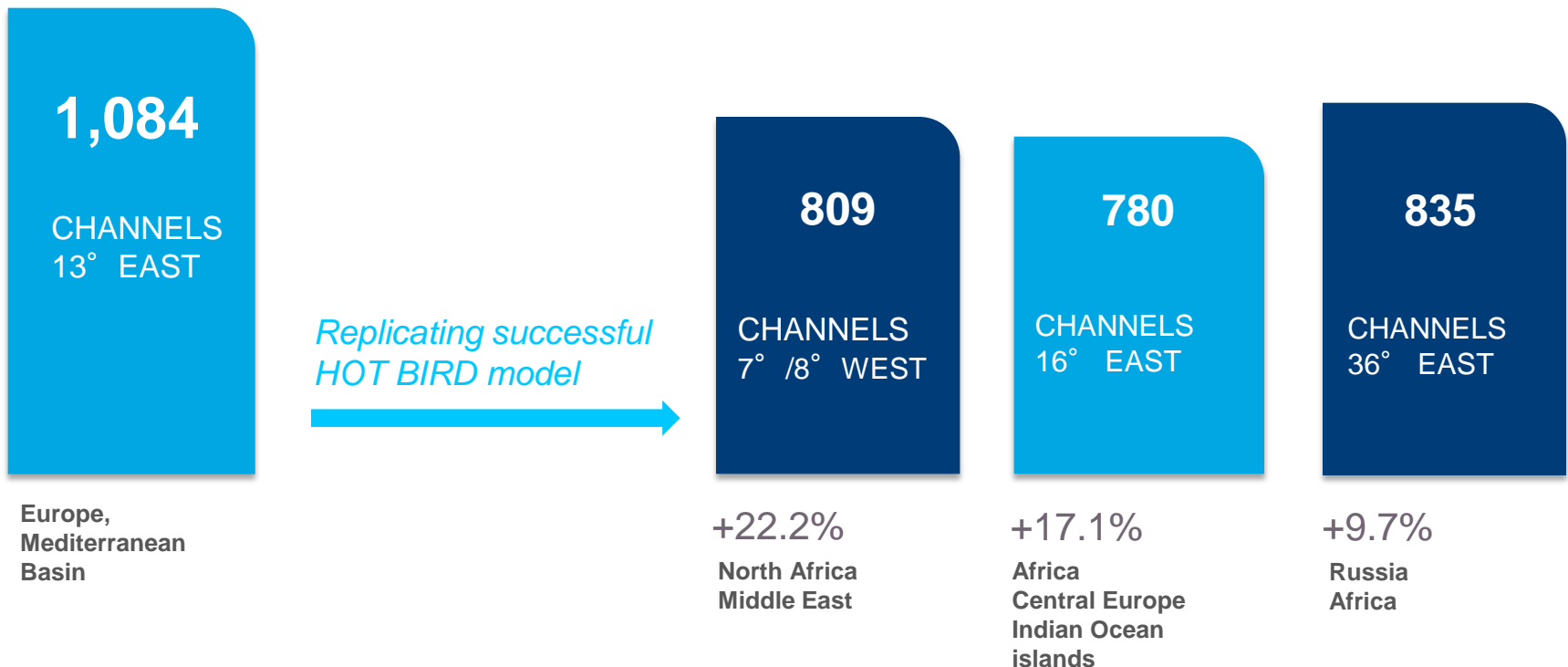
## Digital Terrestrial Television (DTT) platforms (1)

## Free Satellite Package (1)



# VIDEO NEIGHBOURHOODS SERVING HIGH-GROWTH MARKETS

- The HOT BIRD position:
  - > Eutelsat's leading video neighbourhood
  - > Broadcasting over 1,000 channels
- Successful model replicated in other dynamic broadcast markets



Channel growth from June,30 2013 to June,30 2014

# FOCUS ON POLAND: KEY FINDINGS

- 14.5 mil TVHHs (98% of the population)
- **Satellite reaches 46% or 6.8 mil TV households**, or one in two TVHHs, & keeps growing despite maturity
- Hot Bird™ signal received by 6.7 mil TVHHs
- **Eutelsat is the market leader with 92% market share of satellite TV reception**





# FOCUS ON ULTRA HDTV

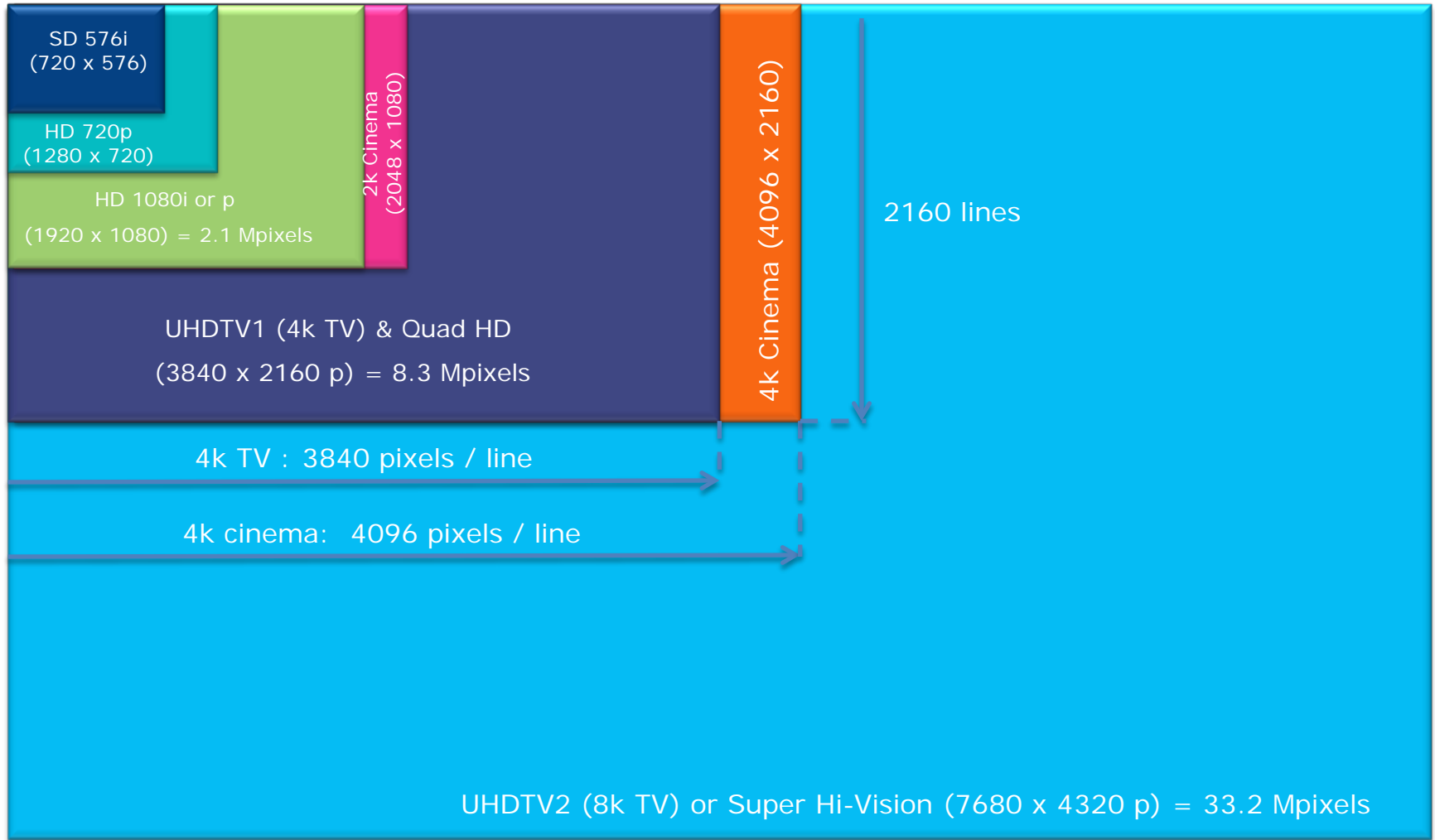
## Ultra High Definition TV (Ultra HDTV) will offer (\*)

- Higher resolution
- Higher frame rate(s)
- More colours
- Higher Dynamic Range (HDR)
- Immersive audio

(\*) With respect to High Definition



# FOCUS ON ULTRA HDTV: EVOLUTION



# FOCUS ON ULTRA HDTV: EUTELSAT DEMONSTRATION CHANNELS

## ✓ 1<sup>st</sup> channel launched on 8 January 2013: Quad HD MPEG-4

- Transmitted via Eutelsat 10A (10° East)
- Technical solution set up with ATEME
  - 4 Full HD streams (1920 x 1080p 50 fps) + 1 Audio (stereo now)
  - MPEG-4 encoding : 4 video streams of 10.28 Mbit/s (50 fps)
- Modulation: DVB-S2 8PSK

## ✓ 2<sup>nd</sup> channel launched for IBC 2013: HEVC at 30 fps

## ✓ Channel in cooperation with Samsung launched for IFA 2013 (10° East) – (Quad HD MPEG-4)

## ✓ HEVC 50 fps demo channel launched on 26th May 2014

- HEVC encoding
- 50 fps
- 10-bit colour depth (1 billion colours)
- On HOT BIRD: premium DTH position over Extended Europe

VIA HOT BIRD  
**4K1**

# ULTRA HD (4KTV) OUTSIDE EUROPE BETWEEN NOW AND 2016

## KOREA:

- South Korean DTH operator KT SkyLife and Japanese Sky PerfectTV! have launched first UltraHD channels in June 2014
- KT SkyLife is broadcasting 4 hours of UltraHD content per day and is planning to have 2 full UltraHD channels by beginning of 2015

## JAPAN:

- NexTV via Sky Perfect JSAT broadcasts 6 hours of Ultra HD content per day
- Sky Perfect plans to open an Ultra HD commercial channel in 2015
- Three 4k TV channels planned in Japan in 2016

## USA:

- Major US player DirecTV announced UHD VoD for end 2014



# EUTELSAT IN SUMMARY

Europe	13° East	120 million homes
Middle East & North Africa	7/8° West	51 million homes
Central and Eastern Europe	16° East	10 million homes
Europe	5°W	1.5 million homes
Francophone Africa	16° East	1 million homes
Eastern and Western Europe	9° East	5 million homes
Turkey and Mediterranean Basin	7° East	6 million homes
Russia	36° East	16 million homes
Sub Saharan Africa	36° East	2,5 million homes
North and Latin America	113° West & 117° West	More than 110 million cable homes

Grazie

