

EUTELSAT

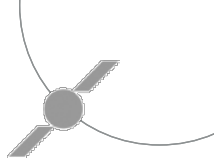
# In a nutshell

**Stefano Agnelli**

Director of European Institutional Affairs

*EIF Study Visit to Milan 'Media, research and entrepreneurship in the digital era: technology excellence and innovation in difficult times'  
17 October 2014*

# Eutelsat, a strong European reality – the origin

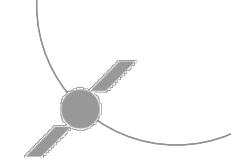


Eutelsat is part of a wide European effort in the 70's to achieve independence in the space sector

- Establishment of the **European Space Agency (ESA)** in 1973
- Decision to implement the **Ariane** launcher programme in 1973
- Creation of a regional telecommunications satellite system, **EUTELSAT**, the European Telecommunication Satellite Organisation, in 1977 (interim, definitive EUTELSAT in 1985)

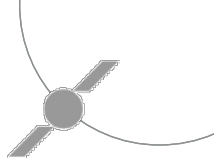
Objectives of the founders

- Meet **Europe's requirements for satcoms**
- Active participation in the **growth and development** of the European space **industry** by procurement and launch of satellites in series

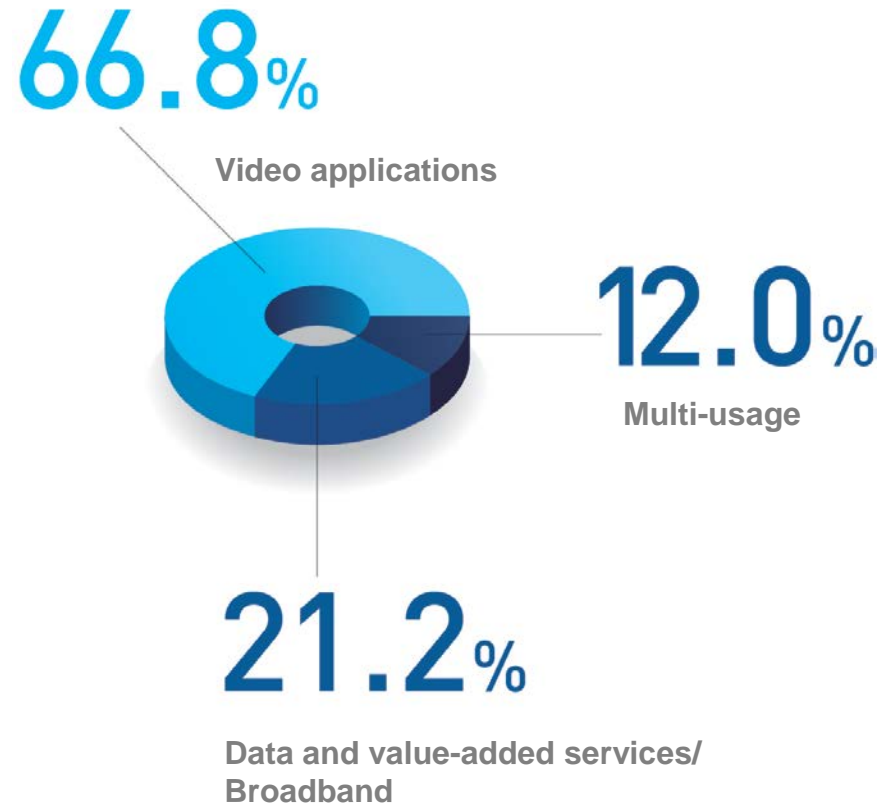


## Eutelsat today – at a glance

# A diversified and balanced portfolio of activities



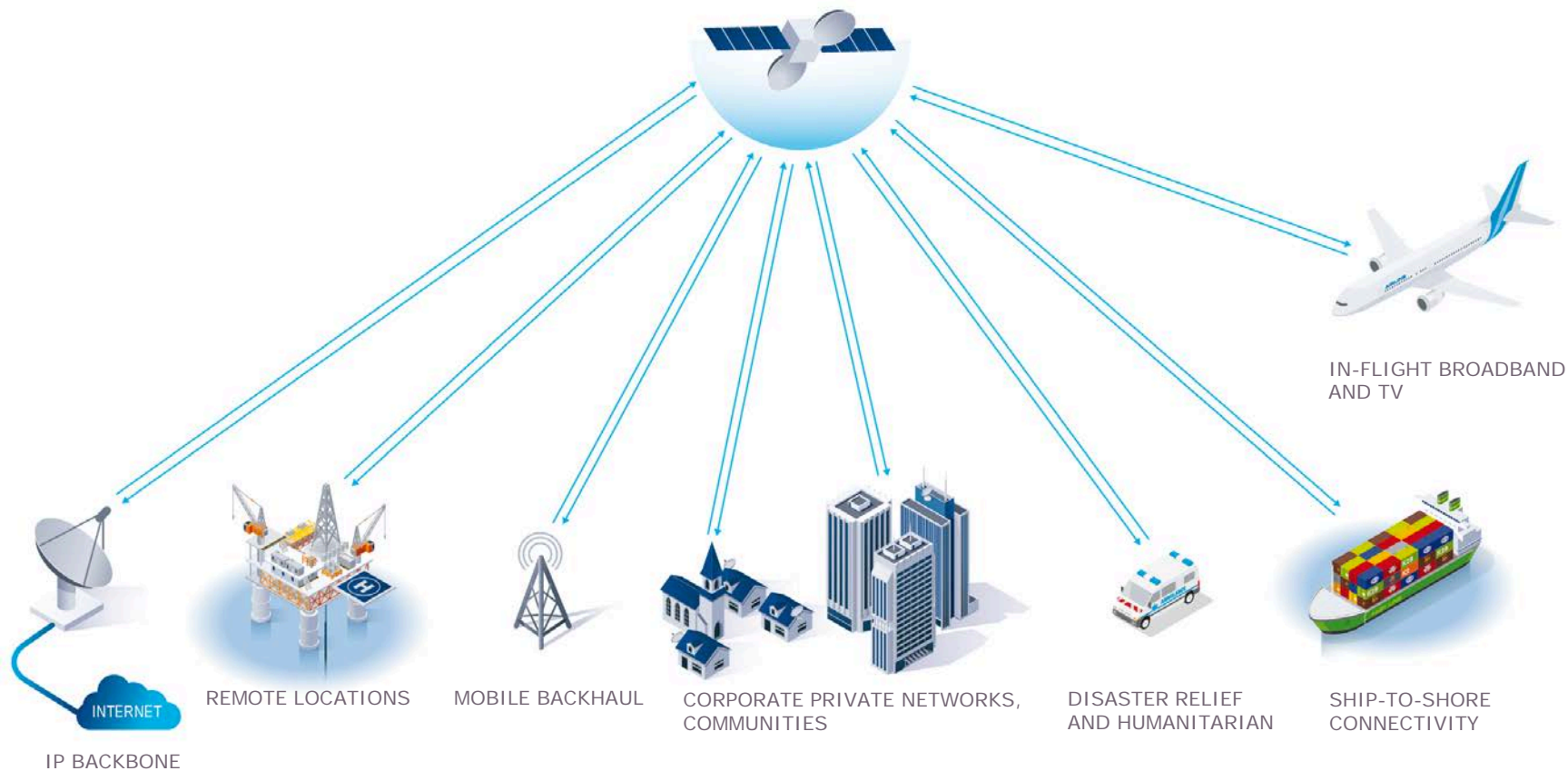
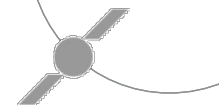
- Over 30 years experience in satellite operations
- €1,348 million consolidated revenues to 30 June 2014 (+5%)
- Strong mix of video, data and broadband services
- Broadcast and broadband account for almost 90% of Group activity
- Group backlog\* of €6.44 billion
  - representing 4.6 years of revenues
  - video remains the largest contributor to backlog



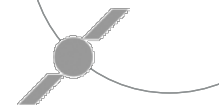
As a % of Eutelsat Communications  
Full-year revenues at 30 June 2014  
(excluding non-recurring and other revenues)

\* Situation 30 June 2014

# A diversified and balanced portfolio of activities





# Shaping future through innovation



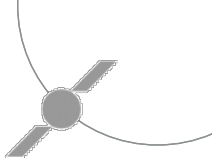
In Space



On the Ground

<p><b>Cost of bandwidth</b></p>	<ul style="list-style-type: none"> <li>Multi-spot HTS design developed for fast growing markets</li> </ul>	<ul style="list-style-type: none"> <li>New encoding schemes for higher compression</li> <li>Enhanced access protocols for Interactive TV satellite services</li> </ul> 
<p><b>Increased security</b></p>	<ul style="list-style-type: none"> <li>Signal prevention / detection techniques</li> <li>Increased resilience to jamming</li> </ul>	
<p><b>Increased flexibility</b></p>	<ul style="list-style-type: none"> <li>Reconfigurable satellite payloads</li> <li>On board power allocation to optimise commercial capacity</li> </ul>	<ul style="list-style-type: none"> <li>Multi-band reception systems (C/Ku, Ku/Ka)</li> <li>Hybrid set-top boxes</li> </ul>
<p><b>Enhanced customer experience</b></p>	<ul style="list-style-type: none"> <li>SmartLNB for DTH Connected TV</li> <li>Multi-screen home IP distribution</li> <li>Home automation</li> <li>Mobile broadband (<i>Eutelsat Air Access</i>)</li> </ul> 	

# In summary, Eutelsat represents ...



- **A key infrastructure complementing terrestrial** for:
  - Broadcasting
  - Broadband
  - Telecoms
  
- 30 years of uninterrupted growth
  
- Exceptionally positioned satellite resources to capture high-growth market opportunities in established and emerging markets
  
- 1,000 skilled professionals operating at offices and teleports across the globe
  
- Pursuing a far-reaching in-orbit expansion programme
  
- **Continued investment to enhance and develop applications and services**