

## The Dangers of Overcapacity

**Overcapacity in Africa can impact Europe and other regions**

by Jan Grøndrup-Vivanco

When the NSS-8 satellite was destroyed after its launcher exploded on January 30, 2007 it overnight created a shortage of C-band capacity over Africa and the Middle East. The NSS-8 satellite had 56 C-band transponders, which was supposed to have created some relief to the African capacity market, which was already getting increasingly tight. The capacity situation over Africa is completely different today where overcapacity will be with us for some time still. This situation will have an impact on Europe and the MENA region as well.

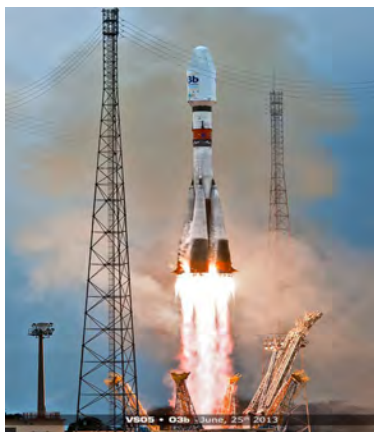
One of the main demand drivers for C-band capacity over Africa in the '00s was cellular backhaul, with cellular operators or their service providers often ordering multiple transponders, benefiting from satellites inherent advantage of wide and immediate coverage over areas not served by terrestrial means.

In addition, many countries in Africa have experienced rapid economic growth in the last decade, contributing to increasing demand for telecommunication, including satellite.

However, only a few years on from a very tight capacity situation at the end of the '00s, the situa-

tion has completely reversed, with large amounts of C-band capacity being available. This is due to several factors.

One of the main factors contributing to the current overcapacity situation is substitution to fiber. Over the last couple of years massive amounts of fiber has landed in Africa and still more fiber capacity is expected in the coming years. The satellite industry tends to put the blind eye to this, by saying



The launch of the first four satellites in the O3b constellation last June brings much needed capacity in developing regions. (photo courtesy of O3b)

(mainly among themselves) that new fibre will only be available at certain landing points and this will just move the demand for satellite capacity inland. While there is some truth to this, one of the facts that the satellite industry is often overlooking is the fact that areas with low population densities, thus ideal areas to be served by satellite, are often areas with low purchasing power.

As a consequence of this, cellular operators are delaying rolling out their 3G networks to the rural parts of their network, because the economics of serving these remotes parts of the network are not favourable, especially if the backhaul is via satellite.

lite.

All market research reports are forecasting that the total demand for satellite capacity in Africa and the rest of the MENA region will increase in the decade to come, which is of course good news for the satellite industry. However, there are several

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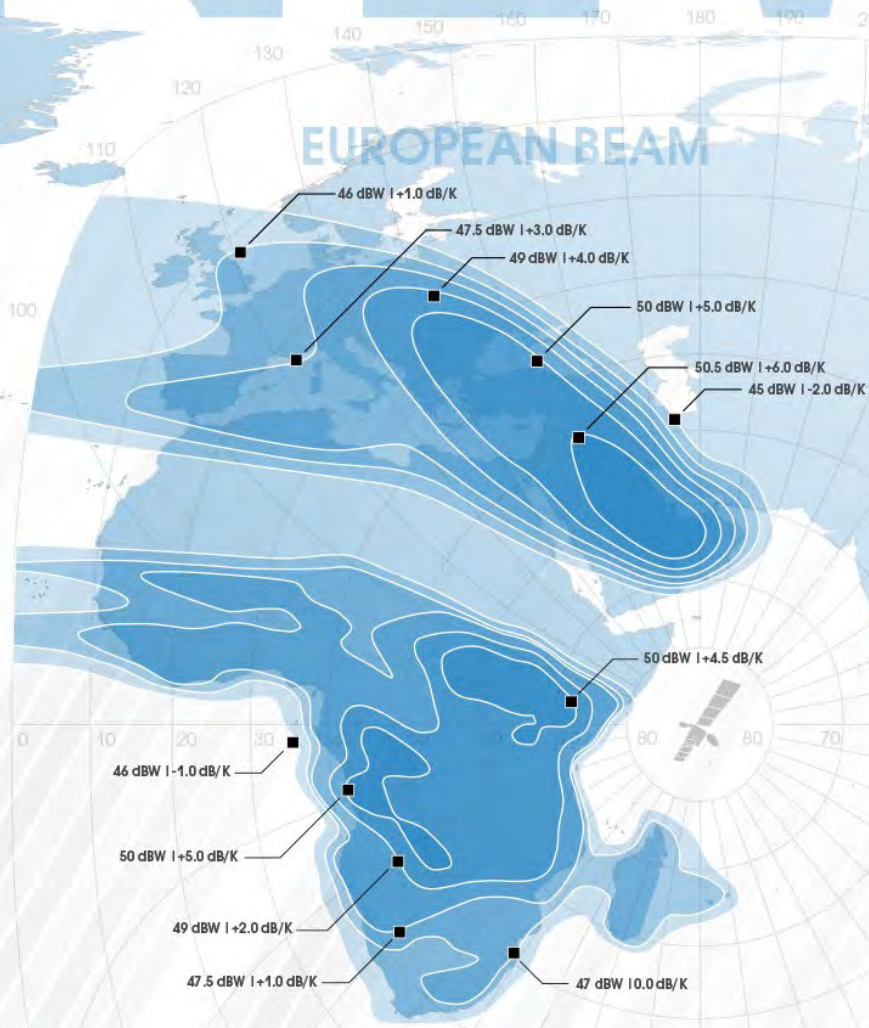
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# YAMAL-402 SATELLITE



## EUROPEAN BEAM



Russian satellite operator – Gazprom Space Systems – presents the new Yamal-402 satellite opportunities to the International Market.

**Yamal-402 satellite**, built by Thales Alenia Space (France), was launched in December 2012. Its capacity is 46 Ku-band transponders (66 equivalent transponders per 36 MHz each). Together with Russian and Northern beams the satellite includes:

- **European Beam** having four transponders per 54 MHz each covers the territory of Western and Central Europe, the Middle East and Northern Africa;
  - **Southern Beam** having 8 transponders per 54 MHz each covers Africa to the south of Sahara;
- Southern and European beams have cross-connection ability.
- **Steerable Beam** having up to three transponders per 72 MHz each can be pointed over African or Asian continent upon the customer request. Steerable Beam can be cross-connected with Northern Beam.

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## The Brazilian Market



For the first time in our six-year history, Satellite Markets and Research partnered with and exhibited at an industry event in Latin America. Last month, we participated in Broadcast and Cable 2013 in Sao Paulo, Brazil and I have to admit, I was very pleasantly surprised. I've attended other industry events in Latin America before, but Broadcast and Cable in Brazil is the real deal. There were over 10,00 attendees visiting over 200 exhibiting companies. The conference was very well organized with some very high-level speakers on the latest technology developments.

While participation in the show is still in the main from Brazil, the country represents almost half of the Latin America market. By all indicators, Brazil is enjoying a healthy economic boom. From the interviews I did with key executives, this seems to be the norm for the rest of Latin America as well, where there is significant demand for satellite equipment and services.

We hope to make Broadcast and Cable as well as other shows in Latin America as part of our regular circuit of shows around the world. With our partnership with Certame, the organizers of Broadcast and Cable, we now actively participate in major satellite and broadcast shows in every continent.

Now we're off to IBC in Amsterdam, which is always a good indicator what's in store for the next year and beyond. One thing's for sure, next year, we will be at all the major trade shows in every corner of the globe.

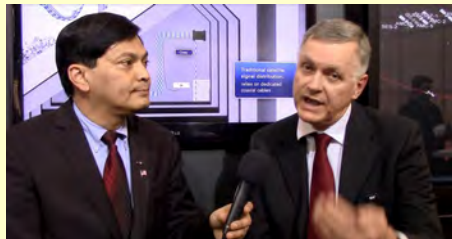
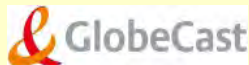


*Virgil Labrador*

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**Dangers of Overcapacity ...From page 1**

factors this time around that will make the future challenging with respect to Africa.

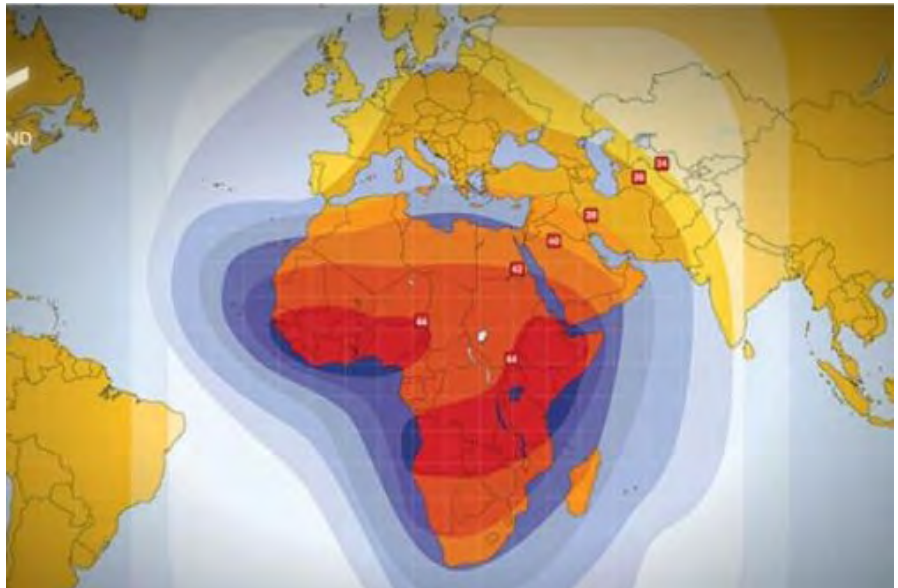
Most satellite operators who traditionally have had C-band capacity over Africa are launching satellites with additional capacity over Africa. In addition, both new and existing regional operators like ABS, APT, Azercosmos, Measat and Yahsat, to mention a few, have or will also launch satellites with new African coverage.

As if this wasn't enough to put on the competitive pressure, Ka-band is coming to Africa big time. Avanti and Yahsat have recently launched satellites with partial African Ka-band coverage and of course O3b has just launched their first satellites. Other operators also have Ka-band payloads in the works, like Intelsat's Epic and Inmarsat's Global Xpress.

These demand and supply drivers are both putting a downward pressure on prices for standard C-band and made Extended C-band a really tough sell. When C-band was in short supply some operators were able to sell their Ku-band for trunking and cellular backhaul, however many of those customers have moved back to C-band for several reasons. One reason is "rain fade" which still stigmatises non C-band capacities in Africa and probably more importantly, the economic advantage of using carrier cancellation technologies in a combined national and international C-band network.

Even though O3b's real impact in terms of market share will probably be marginal in the coming 3-5 years, their "Megabit" pricing will provide a new lower end price benchmark. This will provide a strong "signal effect" in the market and will put pressure on traditional FSS providers.

Above is not just a possible scenario - it is already reality. Only in the last 12 months we have seen that prices for C- and Ku-bands have started to soften significantly. This trend is likely to continue.



**There is no shortage of C-band capacity over Africa. Picture here is the Pan-Africa beam of Spacecom's Amos-5 satellite. The satellite was launched in 2011 in the 17°E orbital position. (image courtesy of Spacecom)**

A big issue for the satellite operators is how to avoid that low prices in Africa will start to spill over into the neighbouring regions of Europe and Middle East, especially C-band hemi capacities which are serving and can be accessed from all three regions through the same beam.

One way to mitigate this issue is to implement price differentiation based on customer location or based on user application.

Price differentiation based on the location of customers is relatively straightforward to implement if a satellite operator has a well functioning sales management process to, avoid arbitration and cannibalisation between various fractions of their sales force and channels.

Only few operators have successfully implemented price differentiation based on the user application of the capacity. Those who have been able to do so, have only done this for selected capacities or satellites in their fleet. Implementing price differentiation based on user application is possible, whereby the operators and their channels for instance charge a higher prices for ca-

pacities used for video compared to capacities used for trunking. To implement application specific pricing is best done in partnership between the satellite operators and their service provider distribution channels.

Even though above will mean more challenging times for satellite operators in Africa, lower prices for a developing continent like Africa is overall good news in the long run. Lower prices will not only drive up usage, it will also open up new markets – the key is how to effectively shield higher yield European markets. This is best done by the operators taking a proactive approach and partner with their go-to-market channels, including sharing both risk and upside that such approach will bring.



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# 4K TV: A Technology Push or a Demand Pull?

by Elisabeth Tweedie

**A**t IBC this year, 53 of the approximately 1400 exhibitors claim to be showing something to do with 4K. My guess is that the number is actually higher as many companies don't list everything that they will be demonstrating in advance. So does this mean that 4K is destined to become a commercial reality?

Following so closely on the heels of 3D it is not surprising that the publicity surrounding 4K is considerably less exuberant than that which accompanied 3D. Nevertheless the same question needs to be answered: "Is this a technology push or a demand pull?" To answer that question we need to look at some of the issues and what has been happening recently.

Eutelsat launched Europe's first 4K channel on Eutelsat 10A at the beginning of this year. It uses MPEG-4 and is transmitted at 40Mbps. The channel is designed to be a demonstration showcase for 4K to benefit all players who want to acquire expertise in 4K, so it is not delivering "regular" TV content to end users.

At this year's annual Television Program Market - MIPTV (Marché International des Programmes de Télévision) held in Cannes in April, SES launched its Ultra HD Experience Initiative inviting content providers to work with it to test the "entire HD Value Chain." A week later during SES Industry Days in Luxembourg working with Harmonic and Broadcom the company gave a live demonstration of Ultra HD using HEVC from an Astra satellite at 19.2 degrees East. The demonstration was broadcast in DVB-S2 at a data rate of 20Mbps so using half the bandwidth of the Eutelsat demonstration.

Elsewhere at MIPTV there were sessions on 4K supported by the BBC, Sky, Sony as well as SES.

Hispasat has also demonstrated 4K delivery in several European countries including Spain and is planning to launch a dedicated demonstration channel shortly. It is also one of the sponsors of a documentary about the Museo de Prado in Spain which will be shot in 4K.

Not to be left out, in June, Intelsat working with Ericsson demonstrated 10 bit 4K at 60 frames per second in the USA. The 100Mbps feed was encoded and decoded by Ericsson and modulated and demodulated by Newtec. Meanwhile in the same month in Asia, Measat also working with Ericsson demonstrated 4K.

On the content provider side, Sky Deutschland – part of News Corp. already has an ongoing UHDTV project and in the USA Phil Goswitz of Directv announced a year ago that his company was planning to replace all SD transmissions with Ultra HD by 2016.

So, certainly on the satellite side plenty of interest in the distribution of 4K. What about the other parts of the value chain?

As always the Consumer Electronics manufacturers are keen to market anything new and with TV replacement cycles now at six to eight years the market potential is there as

(Image courtesy of LG)



the first HD screens are ready for replacement and prices are dropping on 4K sets. However given the disillusionment with 3D there is also more wariness on the part of the consumer. This caution is also being fueled by the current lack of content. The old chicken and egg situation – understandably the content creators are reluctant to invest in the infrastructure needed to shoot and process 4K which is at least an order of magnitude more ex-

pensive, when there are so few screens out there on which to view it. This may change with the next FIFA (Fédération Internationale de Football Association) World Cup to be held next year and the 2016 Olympics, but the 240 hours of 3D footage of the 2012 Olympics didn't do much for 3D in general so this is not guaranteed. There seems to be general consensus that upconverted content doesn't make for a compelling viewing experience.

There is also the issue of longevity of the current sets Michael Zoeller, Senior Director European Sales and Marketing for Samsung has been quoted as saying "no UHD TV today will be compatible with UHD standards to come."

The viewing experience is of course another critical issue – with even the most enthusiastic broadcast engineers admit-

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ting that it is hard to discern the difference between 1080p and 4K on screens of less than 60" diagonal. There are a limited number of living rooms in Europe that can accommodate that size of screen. However to truly appreciate 4K the layout of the living room needs to change. With HD (1080p or i) the ideal viewing position is at a distance of three times the screen height and within a 30 degree angle, with 4K this changes to 1.5 times the screen height and a 55 degree angle. This makes it a much more immersive experience, but is that compatible with the increased use of the second screen while viewing the first?

Andrew Cotton, Principal Technologist at the BBC, believes that for many viewers the quantum leap in the viewing experience will come when higher frame rates of 100 frames per second (fps) are used. This will be particularly relevant to fast sports and action movies. Currently most 4K is using 30 fps whereas "true" 4K is defined as 60fps. Ericsson is one of the few companies already using 60fps in its encoding equipment, however the current High Definition Multimedia Interface (HDMI) standard does not support 60fps so there is no consumer equipment to play this on. This should change when HDMI 2.0 is issued later this year. Another issue with speed has been raised by Andrew Cotton who believes that for the European Broadcasters using 50MHz the fps for 4K needs to be based on multiples of 50 in order to avoid judder when being viewed on HD TV sets.

Integral to the commercial success of 4K is a significant improvement in current compression standards. Somewhat confusingly 4K at 8.3 Megapixels (3840x2160) has approximately four times the number of pixels as 2K (1920x1080) the current HD standard. Meaning that using the current compression standard H.264 (otherwise known as MPEG-4), 4K would need to be transmitted at approximately 48Mbps as opposed to the 12Mbps used for 2K. Given the current demands on bandwidth a fourfold increase per "item" is never going to be commercially viable. Enter H.265 or High Efficiency Video Coding (HEVC). This codec was agreed by ITU members in January of this year and should result in at least a 50% improvement reducing that 48Mbps to 24Mbps at the most, although some estimates consider that the actual savings will be even greater. The current standard supports 8 and 10-bit video and work is continuing on 12-bit video and additional chroma formats.

As always with new technology there is no shortage of working groups aiming to agree on standards and promote the technology. In Europe the European Broadcasting Union (EBU) will be hosting "Voices and Choices" in Geneva this November; with the aim of finding agreement around the detailed technical parameters for UHDTV including: resolution, frame rates, dynamic range and color spaces. In the UK the Digital TV Group (DTG) has recently launched the UK UHD Forum, co-chaired by Andy Qusted, Head of Tech-

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nology for BBC and Chris Johns, Chief Engineer, Broadcast Strategy at BSkyB. The Forum will coordinate UK requirements for the future interoperability of UHD and will work with the Forum for Advanced Media in Europe (FAME), broadcasters and the Digital Production Partnership.

In the USA, the Consumer Electronics Association (CEA) has established a Ultra HD working group to define the core characteristics of Ultra High Definition equipment for the home. One of its first actions was to decide that 4K would now be known as “Ultra HD.”

For HEVC the ITU/ISO/IEC Joint Collaborative Team on Video Coding (JCT-VC) (formerly JVT) is continuing to work on a range of extensions to HEVC, including support for 12-bit video as well as 4:2:2 and 4:4:4 chroma formats. Also included is the progression of HEVC towards scalable video coding.

So to go back to the original question: Technology Push or Demand Pull? Right now we’re clearly still in the technology push stage. HD was in that stage for nearly twenty years

before it became a commercial reality. If it’s going happen 4K or Ultra HD won’t take that long – if for no other reason than the fact that 8K is already lurking in the wings; but also because TV replacement cycles are now much shorter. So *if* the consumer believes in the product the demand will manifest itself in the next few years. Given that the first major content push is likely to be the FIFA World Cup next year – something that has a far greater following in Europe than North America – this time it may be Europe that leads the way forward.



**Elisabeth Tweedie** has over 20 years experience at the cutting edge of new communication and entertainment technologies. She is the Associate Editor of the *Satellite Executive Briefing*. She can be reached at: [elisabeth@satellitemarkets.com](mailto:elisabeth@satellitemarkets.com)

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# Gazprom Space Systems: New Offerings for the International Market

In a two-month span at the end of 2012, Russian satellite operator Gazprom Space Systems (GSS) launched two new satellites, Yamal 300K and Yamal 402. With these two new additions to their fleet, GSS has effectively increased by 2.5 times its current total satellite transponder capacity. GSS now has a fleet of four satellites, of which one-third of the capacity is earmarked for the international market. To tell us more about their new satellites and future plans, Satellite Markets and Research Editor-in-Chief Virgil Labrador spoke with GSS' Deputy Director General Igor Kot. Excerpts of the interview:

*What impact will the launch of your new satellites have on your ability to expand into new markets?*

The new Yamal-402 satellite manufactured by Thales Alenia Space and launched into the orbit in December last year has five beams, three of them covering territories beyond Russia.

This is the most powerful satellite in GSS' orbital fleet. The satellite is placed at the 55 E orbital position and 40% of its capacity allocated in the beams covering the territories outside Russia. This satellite enables GSS to enter new markets.

Four 54 MHz transponders will be operated in the European beam covering Eastern and Central Europe, Middle East and Northern Africa.

Eight 54 MHz transponders will be operated in the wide Southern beam covering the territory of sub-Saharan Africa.

The steerable beam can be pointed over Africa, thus, increasing the African GSS capacity by 3 transponders per 72 MHz each or over other regions, for example, over South-East Asia, expanding the satellite coverage zone.

*How are you approaching the new emerging markets that your new satellites are now covering?*

For a new player it is not so easy to enter the African market. The competition is very intense: global and regional satellite operators have strong presence in this market. To provide services only for the region of sub-Saharan Africa two dozen satellites with the beams covering this region were launched or relocated from other positions in the last two-three years. According to our estimates the capacity offers growth amounting to more than 200 transponders during this period. Moreover, now submarine fiber cable lines are being rapidly deployed in the continent.

In spite of this situation, GSS is very optimistic about its prospects in the African market. There is still a niche to be filled for new satellite capacity of high quality. Remote Afri-

can regions are still in desperate need of satellite communications because of weak development of the access networks.

Satellite operators are also optimistic of the intentions of the African countries to develop Digital Terrestrial Television (DTT).

Many organizations, mining, oil and gas, transportation logistics corporations are expanding their business in Africa. Most

of our long-standing international clients of Yamal-202 satellite (among them well-known service providers and teleports) are more or less aimed to run business with the African countries. Starting from the beginning of Yamal-402 commercial operation in February this year our international client base has expanded almost by one-third.

Currently Yamal-402 is internationally marketed mainly as a satellite for telecommunications service providers (point-to-point, VSAT services, Internet access, content contribution, etc.). But we expect the appearance of TV packages, distrib-



**Igor Kot**  
**GSS Deputy Director General**

uted for DTT, or DTH platforms on this satellite. The power parameters of Yamal-402 allows us to provide these services at very high quality.

We believe that we have strong potential to become successful in this market: a state-of-the-art satellite, very attractive coverage over Central, Eastern and South Africa, the possibility of connection with Europe. We are trying to meet the international standards of service and interaction with clients. Now our main task is to become well-known in the new markets we are serving. Thus we invite all companies to test our satellite capacity in order to make a reasonable assessment of our capabilities free of prejudices. Also we would like to invite all players to visit our stand at IBC show in Amsterdam, 13-17 September and in Capetown at AfricaCom in November 2013.

*How about Yamal-300K, what new offerings are you providing on this satellite?*

Yamal-300K is another new satellite we launched last year. Now it may not be immediately apparent that this satellite is related to the international market. Indeed the satellite is located at the 90 E orbital position; almost all capacity is in Russian beams. But the exception is the steerable beam with three transponders of 72 MHz each by means of which we are exploring the Australian market at the moment.

But the situation will be changed soon after the powerful Yamal-401 satellite launch in the 90 E orbital position in the first half of 2014. This satellite is planned to replace Yamal-202 (in operation from 2003) and moreover to accommodate the Russian clients to be moved from Yamal-300K. After the relocation of Yamal-300K to more eastern position 183 E it will cover the Far East, Northern China, Korea, Japan, the Northern part of the Pacific Ocean (regions of heavy maritime traffic) and reach US West Coast. The steerable beam can be pointed to Australia or another region of South-East Asia.

This new satellite will not be visible from our Telecommunication Center in Schelkovo in the Moscow region. So we are building a new TT&C and teleport facilities near Khabarovsk city.



**Gazprom Space Systems' launch of the Yamal 300K and Yamal 402 satellites last year increased their total satellite capacity by 2.5 times. One-third of all of GSS's transponder capacity is earmarked for the international market.** (image courtesy of Gazprom Space Systems)

*What other satellites are you planning to launch ?*

The Yamal-202 satellite operating at the 49 E orbital position since 2003 and covering all Europe, the Middle East, South and South-East Asia, is in demand and fully loaded. At the end of 2012 this particular satellite generated the main share of GSS' revenues on the international market. In 2016 the replacement of this satellite will be required, and we are preparing a successor.

The more powerful Yamal-601 satellite, which will support the current client base in C-band and allow developing the Russian GSS business in Ku- and Ka-band (this band is dedicated to provide the consumer market in Russia with broadband services) will replace Yamal-202.

According to the results of the tender held by Gazprom in April-July 2013 Thales Alenia Space will manufacture the satellite. Thales Alenia Space's offer was the best in price and manufacturing terms. Moreover GSS and Thales Alenia Space have a positive experience of cooperation in the past with the production of the Yamal-402 satellite. The satellite will be made based on Spacebus 4000 C4 platform.

International Launch Services will provide the launch services. The satellite will be launched by Proton-M with Briz-M upper stage.



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# What's Behind the Satellite Dish?

by Robert Bell

If you drive by a satellite uplink facility, also known as a teleport, you will see an array of satellite dishes, from large to small, a few buildings, and a surrounding security fence. No matter where you go in the world, the set up looks basically the same. But behind the satellite dishes, the reality can be completely different.

Last year, I started talking with satellite operators who have a problem with that reality. Particularly in places where satellite services are on a strong growth track. As entrepreneurs enter the market, their focus is on getting service up, running and paid for – and not always on the quality of the facility and services. For a satellite operator making recommendations about where a customer can uplink to its spacecraft, QOS problems on the ground can translate into failure to provide an end-to-end solution.

I decided to expand my conversational circle and see if teleport operators had the same discomfort. It turned out they did. Those with well-established, high-quality facilities hate losing prospective business to competitors who offer a cheaper price to customers who don't necessarily understand the quality difference. Many early-stage companies want to know how to bring their facilities up to world class.

These intersecting interests have led the World Teleport Association to start work on developing a certification program for teleports. We want to make it simple, clear and reliable, and to leave it to customers to make the price-performance decision.

Do they want to buy service from a Tier 1 teleport, where they can count on the state-of-the-art in terms of systems, connections and procedures? Can their application be just as successful if delivered through a Tier 4 facility, where lower prices reflect a lower level of investment in facilities and connectivity? It is up to the customer to decide, and to teleport operators to respond. What the WTA and its members

want to provide is greater transparency, so that expectations line up more often with outcomes.

To understand what the standards for certification ought to be, we will go to the experts: teleport operators who know their operations inside and out, and can tell us what is feasible and meaningful to measure and what provides detail without insight. We will also ask customers in media, government and enterprise to provide feedback, so that the final standards meet their needs.

It is early days yet, but early input from teleport operators confirms the importance of this project. Sixty-four percent of respondents to a member survey called the potential business

value of certification very high or high. Based on a description of a certification procedure – still theoretical at this point – fifty-seven percent called it excellent or very good. That is positive enough to justify taking the project to the next step.

In New York City, where WTA is based, the restaurants receive a letter grade from the Department of Health that tells patrons about the conditions in kitchens that most of them never see. In a year or two, satellite service customers may be able to get the same insight into what is going on behind the dishes at their teleport of choice.



**What goes on behind the satellite dishes is just as vital to the viability of teleports.**  
(images courtesy of Newcomm)



**Robert Bell** is Executive Director of the World Teleport Association, which represents the world's most innovative teleport operators, carriers and technology providers in 20 nations. He can be reached at:

[rbell@worldteleport.org](mailto:rbell@worldteleport.org)

# Industry Executives Optimistic on Growth

by Virgil Labrador, Editor-in-Chief

The increase in digital distribution and the continued shift to mobile devices for the delivery of all communications and content, is helping drive revenues for media and telecom companies, according to a recent poll of industry executives by KPMG.

According to KPMG's *2013 Media & Telecommunications Industry Outlook Survey*, more than 70 percent of the U.S. senior executives polled say their company's revenues have increased from last year, and 75 percent expect their company's revenues to increase over the coming year, with 43 percent expecting revenues to increase by at least 6 percent.

More than 80 percent of those polled believe revenues derived from digital content distribution will continue to increase this year, which is down about 10 percent from last year.

Half of the media and telecom executives said they have witnessed a "moderate" increase in revenue from transactions on mobile devices, with 19 percent citing a "significant" increase. The survey provided an opportunity to compare the thoughts and opinions of media executives versus their telecom counterparts.

Media executives were more optimistic than the telecom executives regarding

their company's projected overall revenues, with 83 percent of the media executives expecting an increase, compared to 68 percent for telecom executives.

Nearly 70 percent of those polled said that maximizing digital revenue growth is either critical to their business or very important strategically, while nearly 80 percent pointed to the ability to evaluate information on customer purchases, sentiment and preferences.

Paul Wissmann, lead partner for KPMG's Media & Telecommunications practice in the US. "But while the media companies are focused on growth from new revenue streams, the telecom companies seem to be focusing their attention on their core offerings and cost containment."

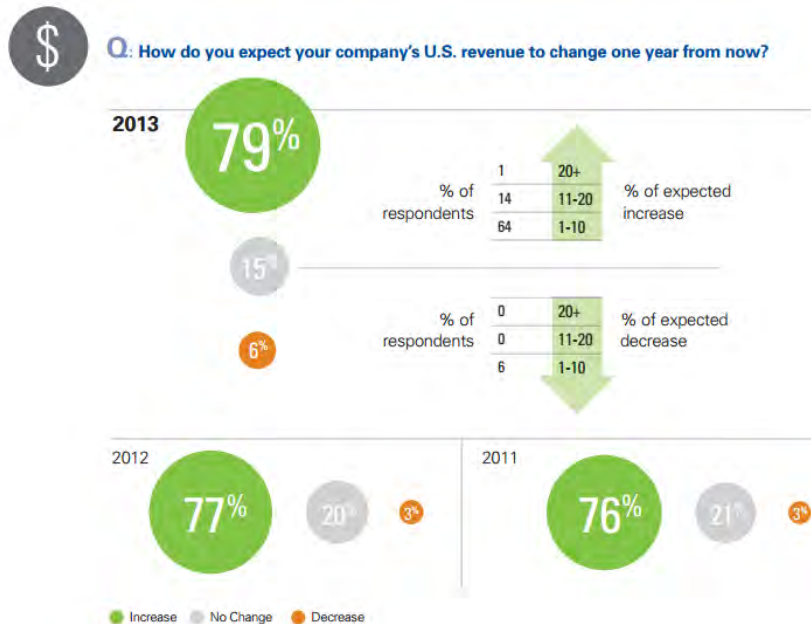
The most significant growth barriers facing the executives over the next year include pricing pressures and staying on top of emerging technologies. Those who cited pricing pressures, 43 percent, up from 35 percent last year and staying on top of emerging technologies, 42 percent, compared to 29 percent last year.

Losing share to lower-cost producers poses the biggest "threat" to their business models, according to 39 percent of those polled, followed by disruptive technologies at 33 percent and political and regulatory uncertainty at 27 percent.

Companies are embracing newer technologies in their customer interactions and

as an internal collaboration tool. A majority of companies are planning to use digital/ social/ mobile technologies more this year to get closer to their customers. 56 percent say they plan to use it for two-way customer engagement and insight; 47 percent for enterprise collaboration and knowledge sharing; and 46 percent for external brand promotion.

A majority of the executives (59 percent) said their companies plan



**Nearly three-fourths of the U.S. executives surveyed by KPMG responded that they foresee an increase of their revenues in the next year.**



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to increase capital spending this year, compared to just 49 percent last year. The three top areas media & telecom executives expect to increase spending over the next year include:

- New products or services- 47 percent, down from 56 percent last year.
- Geographic expansion (U.S and global) - 40 percent, up from 22 percent last year.
- Information technology -- 27 percent, down from 43 percent last year.

The top two concerns addressed by the executives regarding their company's future include: Their competitive position (36 percent, up from 24 percent last year); and keeping pace with changing technology (30 percent, up from 22 percent last year.)

"With telcos hampered by intense competition and expensive network upgrades, they appear to be focus-

***"...With telcos hampered by intense competition and expensive network upgrades, they appear to be focusing on enhancing the pipe to the consumer, as opposed to making a significant shift into content or services.."***

ing on enhancing the pipe to the consumer, as opposed to making a significant shift into content or services," said Wissmann. "While they will certainly have a part in the evolution of digital services, as primarily a supplier of bandwidth, telcos run the risk of becoming a business with a product that is increasingly commoditized."

Other findings of the survey include:

Only one-third of the executives say their company is very prepared to manage the impact of public policy and regulatory changes.

42 percent of the executives say their company is at least somewhat likely to

be involved in a merger or acquisition over the next year, as a potential buyer, and 38 percent as a potential seller. They cited cost containment, access to new technology and products, and product synergies as the main drivers of alliances and M&A activity.

Moving some items to the cloud seem to be almost a given with the executives, with only 10 percent saying they have no plans to implement cloud technologies. Of the 64 percent of executives that have implemented some aspect of cloud technology, 47 percent said they had only minor or no challenges, while 17 percent said they faced major challenges.



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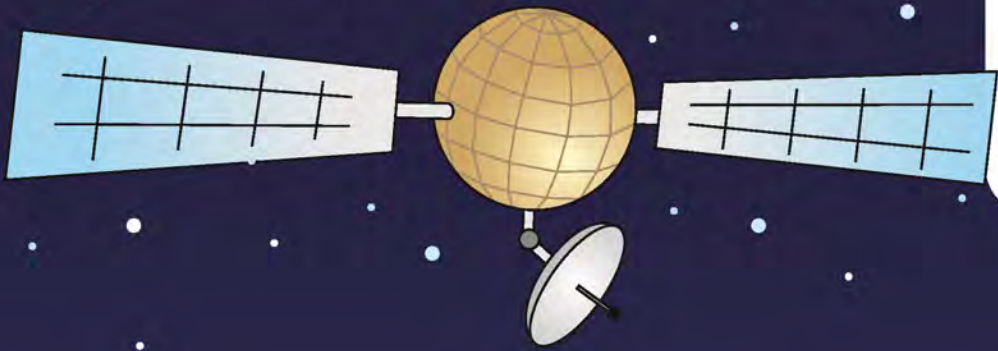
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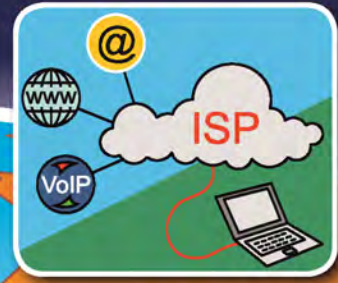
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## RRSAT Acquires UK-based JCA



**RRsat Global Communications Network Ltd.** has acquired **JCA**, a London-based provider of content management services, which has an impressive track record of growth and revenues of almost US\$ 10 million last year. RRsat, which provides global, end-to-end, content management and distribution services to the rapidly expanding television and radio broadcasting industries, said the acquisition is fully aligned with the company's growth strategy of becoming a global company with local presence in key locations.

"This acquisition and the formation of RRsat Europe Ltd. are important milestones in the implementation of our strategy to become a global company with local presence, closer to our clients," said Avi Cohen, RRsat CEO.

He added RRsat is now establishing a strong foothold in Europe, specifically in London, one of the world's largest centers for media and broadcasting. "The continued execution of this strategy will allow RRsat to expand further, effectively leveraging our global distribution infrastructure," he said.

RRsat also outlined other strategic benefits of the JCA acquisition. The company said it will gain a talented

management team, with over 30 years of industry experience, which will strengthen the company's senior management team. The company will also now enjoy a presence in London, a key strategic market and one of the premier broadcasting centers in the world, providing access to customers in continental Europe with top-tier customer base, including BBC Worldwide, Sony DADC, Shine International, Channel 4, Classic Media, DRG, Film4 as well as access to additional higher tier local broadcasting customers in the U.K. and Europe.

The acquisition will also broaden RRsat's content management capabilities, including expanded content preparation capabilities such as film restoration, ingest and transcoding, content reversioning, digital platform distribution and its bespoke Media Window providing clients with their own on-line platform.

RRsat is acquiring 100 percent of TVP Group of which JCA is a wholly owned subsidiary. In consideration for the acquisition, RRsat will pay \$9 million in net cash. An additional payment of \$4.5 million will be deferred, conditional on business results including revenue growth and profitability in the three

years following the acquisition. Management expects the acquisition to be accretive during the fourth quarter this year.

"Once we complete the integration of JCA, we plan to increase its core service and expand its global customer base and services," Cohen said.

"Our existing client base will benefit from additional sophisticated content preparation services. We plan to take advantage of the experienced local management team and their access to top tier clients in the U.K and Western Europe and offer RRsat's complete set of content management and global distribution services. Financially, we expect this acquisition to improve our overall profitability."

RRsat management expects to fund this acquisition using cash on hand and through expected operating cash flow of the acquired entity.

## C-COM Enters into Strategic Partnership with Vislink

**C-COM Satellite Systems Inc.** announced that it has entered into a strategic partnership with **Vislink**, a United Kingdom based secure communication technology provider.

Vislink will promote, market, sell and support the C-COM manufactured range of iNetVu® products, which would complement Vislink's existing product range and allow it to expand into new vertical markets including oil & gas; mining; police, fire, emergency and disaster management.

The iNetVu® mobile antennas will be

integrated with Vislink's technology and sold by Vislink to their customers as turnkey systems. C-COM will also promote and sell Vislink's high end SNG and MSAT antenna products by making it available to all its resellers around the globe.

"C-COM's Ka-band iNetVu® Mobile antennas combined with Vislink's broadcast and security solutions should open up new vertical markets for both companies. Vislink's global presence combined with our worldwide reseller network will allow us to generate incremental revenues by delivering new ap-

plications to our mutual customer base," said Leslie Klein, President and CEO of C-COM Satellite Systems Inc.

C-COM and Vislink will co-operate on joint R&D projects to develop new products and to leverage on the support programs and incentives offered for research and development in Canada. "The combined resources and strengths of both companies should reduce overall costs for research and development and also reduce time to market," said Bilal Awada, CTO of C-COM Satellite Systems Inc.

## Wasserstein & Co. Acquires Globecomm

An affiliate of private equity and investment firm **Wasserstein & Co.** has entered into a definitive agreement to acquire **Globecomm Systems** for US\$ 14.15 per share or about US\$ 340 million in cash.

Globecomm announced the purchase price represents a premium of 21.9 percent over the closing price on January 14, 2013, the day on which Globecomm said it had retained Needham & Company to assist it in a review of potential strategic alternatives to enhance shareholder value.

David Hershberg, Chairman and CEO of Globecomm, said the transaction is in the best interest of the company's shareholders, customers, partners and employees. He added, "Wasserstein & Co. has a proven track record of helping companies build on their success."

The deal was unanimously approved by

Globecomm's Board of Directors and is expected to be completed in the fourth calendar quarter of 2013. The merger is



subject to antitrust clearance and other governmental approvals, Globecomm stockholder approval, the satisfaction of certain financial conditions and other conditions.

The transaction is expected to be financed through a combination of cash provided by Wasserstein & Co. affli-

ates and other co-investors, as well as debt financing. A news release has stated that Highbridge Principal Strategies, LLC has committed to help finance the deal.

Anup Bagaria, co-Managing Partner of Wasserstein & Co., said they believe Globecomm's successful investments in new product development will drive future growth in both the company's existing and new markets.

Wasserstein & Co., with offices in New York and Los Angeles, is an independent private equity and investment firm, focused primarily on leveraged buyout investments and related investment activities. It manages capital on behalf of institutional and individual investors. The firm is focused on investments primarily in the media, consumer products and water equipment and services industries.

## Gilat Sells Spacenet Subsidiary



its **Spacenet Inc.** subsidiary to Tulsa, Oklahoma-based SageNet. The aggregate consideration for the sale is approximately US \$16 million, subject to certain post-closing adjustments and expenses.

The transaction is subject to regulatory approval and the satisfaction of customary closing conditions and is expected to be completed within the next three months. The transaction is expected to result in a capital loss of US\$1 million to US\$ 3 million, which includes banker's fees, legal fees and other transaction related expenses.

**Gilat Satellite Networks** Ltd. announced that it has entered into a definitive agreement to sell

In fiscal 2012, Spacenet's business generated revenue of approximately US\$ 77 million, approximately US\$ 2 million operating loss and EBITDA of approximately US\$2 million.

The sale of Spacenet, which currently operates as part of Gilat's Services Division, is expected to strengthen Gilat's strategic focus as a satellite communications technology company with innovative commercial and defense products and solutions for internet access and on-the-move applications.

Spacenet is expected to become a major customer for Gilat and to continue to offer services based on Gilat's products as part of the expanded organization's solutions portfolio.

"The sale of Spacenet will allow us to better focus our assets and management attention on our core business strategy

and strategic target markets," said Erez Antebi, CEO of Gilat Satellite Networks.

For Spacenet, which has transitioned over the last few years from primarily a VSAT services company into a managed network services company, the acquisition will serve to increase its position and growth potential in the market.

Since 1981, Spacenet Inc. has designed, implemented and managed some of the largest communications networks for US-based business, industrial and government customers and today manages communications at more than 160,000 locations for customers including many Fortune 500 companies and major government agencies.

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## Amos Spacecom Hall 1 booth no. 1.C65

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providing a full range of satellite services for Asia, Russia, the Middle East and other additional service areas. **AMOS-4's** multiple Ku-and Ka-band transponders create a powerful platform, enabling a wide range of cross-band, cross-beam connectivity options. For their customers, this means extensive broadcast and broadband reach into the vast urban and rural areas of these regions. Available satellite services for customers include Direct-To-Home (DTH), video distribution, VSAT communications and broadband Internet.

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The **AMOS-6** satellite is planned for launch in 2015, to be co-located at the 4° W orbital position with **AMOS-3**, replacing **AMOS-2**. It will provide steerable Ku-band beams with Pan-European and Middle East coverage, and a Ka-band beam for broadband services with coverage in Africa and Europe.

## ARABSAT Hall 1 booth no. 1.B38 [www.arabsat.com](http://www.arabsat.com)

**ARABSAT** as a satellite operator has been serving the growing needs of the Arab world for over 30 years. Now ranked the 7th top satellite operators in the world and by far the leading satellite services provider in the Arab world, it carries over 450 TV channels, 170 radio stations and 3 Pay-TV networks reaching tens of millions of homes in more than 80 countries across the Middle East, Africa, Europe—and way beyond around the world—including an audience of over 170 million viewers in the Middle East and North Africa (MENA) region alone tuned into Arabsat's video "hotspot" at 26° East.



Operating a growing fleet of six owned satellites, and more yet to come, **ARABSAT** is the only satellite operator in the MENA region offering the full spectrum of Broadcast, Telecommunications and Broadband services. **ARABSAT** satellites' fleet is the youngest in the region with the highest possible reliability and flexibility. This translates to unrivalled in-orbit backup, as well as more space capacity than any other player in the region for more TV and radio broadcasting services, professional data network solutions, telephony and IP trunking backbone connectivity, and broadband Internet access for media and entertainment companies, corporate



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ABS offers a complete range of tailored solutions including broadcasting, data and telecommunication services to enterprises and government organizations. Through its teleports and alliances with world-class partners including Bahrain and Tel Aviv, ABS offers SCPC, MCPC, Payout, Encryption, Turn-around, Uplink, Co-location, IP backbone and VSAT services. ABS also provides full satellite operations, payload and client monitoring, tracking, telemetry and control services, and a full Network Operations Center (NOC) managed 24/7 by highly trained professionals.

**AVL Technologies**  
**Hall 5 booth no. 5.A49**  
[www.avltech.com](http://www.avltech.com)

**AvL Technologies'** stand at IBC13 this year will focus attention on the EutelSat, Avanti, Hughes and ViaSat type-approved Ka-band antennas used as the "antenna of choice" on broadcast and broadband systems throughout the world.



Fair goers can get an up-close view of the EutelSat type-approved 85cm vehicle-mount antenna, the 1.2M ViaSat type-approved mobile VSAT, as well as examples of the industry-leading 1.2M SNG roof-mount with cowling with an amazing 26cm (10") stow height, the original 90x66 cm carry-on antenna that packs into various small cases, and the recently-revised 60cm manual FlyAway antenna weighing only 16 kg (35 lbs) packed in airline carry-on compliant backpack that now has additional 'family members' at 85cm, 1.2M and 1.4M. AvL offers the only Hughes type-certified 1.0M and 1.2M Ka-band antennas (with a future option for 85cm) for vehicle-mount and Fly-Away configurations with both solid and segmented reflectors.

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benchmark of excellence for mobile broadband Internet access, Satellite News Gathering, Disaster Relief, Oil & Gas Data Backhaul, and Defense & Homeland Security solutions.

**C-COM Satellite Systems Inc.**  
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EXPLORER BGAN is a series of L-Band terminals utilizing the BGAN

network from Inmarsat. BGAN is the chosen data and voice service when the requirement is quick deploy, ultra-portable, reliable and fast communication in areas where terrestrial telecoms aren't available. We offer two types of BGAN terminals. Four ultra-portable terminals (no bigger than a laptop) and two vehicular terminals with satellite tracking antennas, making it possible to stay connected, even on-the-move.

EXPLORER VSAT terminals offer back-pack antenna systems that are portable, lightweight solutions for use anywhere in the world. With solutions that include ancillary equipment for VoIP, RoIP, Fax, Video and Data, systems are customized to individual requirements. The ACU, antenna control unit, from Cobham SATCOM is now the standard of measure for auto-acquire and auto-deploy antenna systems throughout the world. From a wide array of Fly-Away antennas to a broad selection of Vehicle Mount antennas including Comm-On-The-Move, the EXPLORER VSAT Product line offers the ultimate in dependability.

### Comtech Xicom Technology

Hall 1 booth no. 1.F80

[www.xicomtech.com](http://www.xicomtech.com)

**Comtech Xicom Technology, Inc.**, located in the heart of Silicon Valley, is the world's leading SATCOM power amplifier supplier, offering the broadest product line in the industry. For more than 20 years, our focus on customers, innovation and quality has created a tremendous breadth of products and created a company with a reputation for excellence.



Comtech Xicom Technology's new generation of XTCT rack-mount controllers provide an easy to use, intuitive touch screen interface for monitoring and controlling outdoor amplifiers (ODUs). The new touch screen front panel displays the HPA's operational status, including power output and temperature, graphical displays of parameter trend analysis, and event logs. Local and remote diagnostics can also be easily performed via an Ethernet interface. This new display eliminates the need for a separate external controller to control multiple HPAs for common architectures (TWTAs or SSPAs). All operational data is saved within the amplifier's non-volatile memory, providing a complete history of the HPA in the event that the unit needs service or repair.



The XTCT controller is housed in a 3RU, 19-inch rack unit and can be configured for controlling a single amplifier or multiple amplifiers in a 1:N redundancy system. The use of Ethernet technology means that additional HPAs and switches can be controlled to meet individual customer's requirements.

### Gazprom Space Systems

Hall 4 booth no. 4.C56

[www.gazprom-spacesystems.ru](http://www.gazprom-spacesystems.ru)

**Gazprom Space Systems (GSS)** is a Russian non-governmental satellite operator. GSS operates four Yamal satellites. Yamal-201 (90°E) serving Russia, Yamal-202 (49°E) aimed at international market and successfully launched at the end of 2012 two new satellites: Yamal-300K (90°E) serving Russia and Australia (Steerable beam) and Yamal-402 (55°E) aimed at international market. Yamal-401 (90°E) is under construction to be launched next year. Main business directions of GSS are providing satellite capacity, telecommunications services and system integration.



In the international market GSS is positioned as a Fixed Satellite Service Operator, while within Russia the company is also a Services Provider (satellite communication links, satellite broadcasting services, satellite Internet access, aerospace monitoring services) and a System Integrator (development of space and ground communication systems).

### GlobeCast

Hall 1 booth no. 1.A29

[www.globecast.com](http://www.globecast.com)

At IBC2013, **GlobeCast** will present a new look and positioning for the broadcast service provider, underlining the company's shift toward working with its broadcast clients on tailored solutions based on each broadcaster's strategy. GlobeCast will also be touting its latest contracts, as well as new developments in the over-the-top (OTT) space.



In terms of business and product news, GlobeCast will highlight new OTT deals, such as an application developed for sport powerhouse beINSport, as well as a suite of B-to-B services for OTT content, whether live, VoD, or a conversion of live to VoD. On the traditional side, new satellite capacity agreements have recently been concluded, such as a deal with Arabsat in North Africa, and will be highlighted at the show, as well as increased fiber connectivity to the four corners of the globe.

With regard to 4K, GlobeCast has also been involved in the development of standards for HEVC compression and the UHDTV experience through its membership in the 4Ever Consortium.

In one place, a visitor to GlobeCast's stand will have the unique opportunity to explore and discuss the merits of satellite, fiber, OTT distribution, media management, and content regionalisation with a company that can provide the simplicity, flexibility, and knowledge to deliver a solution aligned

with each broadcaster's specific strategy.

As in previous years, GlobeCast will be sharing its stand with sister company Netia, whose powerful software for media asset management empowers broadcasters to take control of their media libraries and construct efficient workflows.

**Hispasat**  
**Hall 1 booth no. 1.A40**  
[www.hispasat.com](http://www.hispasat.com)

HISPASAT's satellites are located in three orbital positions: a Trans Atlantic position at 30° West, in which satellites are located: Hispasat 1C, 1D, 1E and Spainsat; an American position at 61° West, in which the Amazonas 1, 2 and 3 satellites is located; and an eastern position at 29° East, in which the Xtar-Eur satellite is located.

The high power offered by the satellites, which form part of the HISPASAT system, allows for optimum coverage with the highest degree of flexibility in America, Europe and Africa. They are clearly situated as the ideal tool for all types of satellite communication services.

HISPASAT has thus consolidated its position as the satellite system offering the best coverage in Spain and Portugal and as the leading operator in Latin America, offering exceptional coverage over the American continent. Furthermore, the Trans Atlantic capacity of its satellites offers simultaneous coverage in all of the countries on the American continent.

**Narda Test Solutions**  
**Hall 8 booth no. 8.A04**  
[www.agfranz.com/prod-narda.html](http://www.agfranz.com/prod-narda.html)

At IBC the two test equipment analyzers from **Narda Test Solutions** will be showcasing two test equipment analyzers.

The portable, low-weight **IDA Interference and Direction Analyzer** is a highly sensitive spectrum analyzer, optimized for interference localization, with an extremely fast sweep time of 12 GHz/sec and a real-time bandwidth of up to 32 MHz for intercepting short term signals. The unique smartDF direction finding mode manages triangulation results and automatically calculates emitter positions. These features enables the operator to



**Narda Interference and Direction Analyzer**

quickly localize interfering transmitters, and they support close range reconnaissance and signal monitoring.

The **Narda Remote Spectrum Analyzer NRA** is a family of 19" 1RU rack mountable high speed test equipment that is easily integrated and remotely controlled in measurement environments. The fan-less design ensures silent continuous operation. The wide bandwidth (9kHz to 6 GHz) of the NRA-6000 enables the operator to simultaneously monitor radio, cellular, LTE and WiMAX Signals. The NRA-3000 is capable of analyzing signals from 9kHz to 3GHz for line-up and troubleshooting of satellites. It is also available with an integrated LNB control making it ideally suited for satellite communication systems.

The IDA and the NRA are available in North America through A.G.Franz, LLC <http://www.agfranz.com/prod-narda.html>

**ND SatCom**  
**Hall 5 booth no. 5.A05**  
[www.ndsatcom.com](http://www.ndsatcom.com)



At IBC, **ND SatCom** will be highlighting its Ka2Go

plug and play terminal. The new Ka2Go terminal is designed for fast and easy transmissions in Ka-band. The lightweight plug & play terminal is fully KA-SAT compatible, therefore making it perfect in combination with the NewsSpotter service. It provides fast and stable transmissions with up to 10 Mbps data rate throughput.

The Ka2Go terminal is the most advanced vehicle mounted antenna system within ND SatCom's SKYRAY antenna family. It is designed to fulfil the most demanding broadcasting requirements and is based on a proven lightweight and robust design.



**ND SatCom Ka2Go terminal**

The terminal includes a patented motorised positioner and automatic pointing system to any satellite, making handling very easy.

The antenna is made up of a high precision offset Ka-band reflector, GPS receiver, a compass enabling auto-pointing and auto-network acquisition. In addition to the antenna, the terminal integrates a KA-SAT modem, IP router and antenna controller. The Ka2Go terminal fits on vehicles of all sizes and is an ideal solution for permanent or ad-hoc transmissions in Ka-band.

**Newtec**  
**Booth no. B14**  
[www.newtec.eu](http://www.newtec.eu)

Newtec will be highlighting the most efficient broadcast equipment for video contribution and distribution including the award winning MDM6100 Broadcast Satellite Modem and the M6100 Broadcast Satellite Modulator.



**Features include:**

- Seamless migration to Multistream and S2 Extensions
- Re-use of existing infrastructure
- Reduction of satellite interference through DVB CID
- Ready for HEVC and UHDTV

The new modem is capable of increasing broadcast efficiency by up to 60% compared to DVB-S2, equipping broadcasters and satellite service providers with all of the latest modulation, multistream transmission and wideband transponder support. The MDM6100 can act as a modem, modulator or demodulator, and can be used in conjunction with set-top boxes, professional Integrated Receiver Decoders (IRD) and satellite demodulators.

The MDM6100 can act as a modem, modulator or demodulator, and can be used in conjunction with set-top boxes, professional Integrated Receiver Decoders (IRD) and satellite demodulators.

**SatService GmbH**  
**Hall 1 booth no. 1.F47**  
[www.satservicegmbh.de](http://www.satservicegmbh.de)

At IBC, **SatService** will be showcasing its new L-Band DC Inserter with integrated Input Level Monitoring, *sat-nms* LDCI. The *sat-nms* LDCI is a highly sophisticated unit designed for professional satellite receive applications. It is available as a scalable system with up to 5 hot-pluggable modules integrated in a 2RU 19" rack-mount chassis.

Each module is designed to support 4 LNBs with



**SatService's *sat-nms* LDCI**

DC power and monitor their L-Band output signal power. All modules include RF gain adjustment and extensive monitoring functionality like LNB supply current with min/max current threshold. The remote MNC interface is via web-browser, SNMP, HTTP GET functions and RS232 interface as in all other *sat-nms* products. The 19" rack-mount chassis

also provides an LCD display and keyboard for local control as an option.

The scalable system is able to support even a single antenna sub-system with 4 LNCs for a small application to a reasonable price, but is also able to provide power to an unlimited number of antennas with multiple *sat-nms* LDCI chassis. The only restriction is the supply current to the LNBs of max. 5.5 Amps. in total per standard chassis. But the *sat-nms* LDCI can also be delivered in other configurations with the ability to supply a higher total current.

The main applications of the *sat-nms* LDCI are multiple LNB DC power insertion within a compact frame, where size is a critical issue, and additional DC power insertion in front of a L-Band Matrix. Due to the scalability the *sat-nms* LDCI is also the unit of choice in teleports with a large number of receive antennas.

**SatLink Communications**  
**Hall 5 booth no. 1.A17**  
[www.satlink.tv](http://www.satlink.tv)

**SatLink Communications** will be debuting for the first time in Europe its forthcoming OTT solutions including Multi Screen Technical Delivery services for Live TV & Video On Demand (VOD) aggregation and streaming to all devices. In addition, SatLink will also be showcasing the new Cross Screen Multimedia Platform service featuring an end-to-end IP cloud-based platform providing centralized content, subscriber & monetisation management solutions.

During IBC SatLink will also offer special promotions on its satellite platforms to emerging TV markets to Asia, Africa



and Latin America.

The combination of SatLink's digital media management and delivery services from its teleport and newly equipped HD Playout and Content Management Centre and cross-screen OTT solutions enables SatLink to support media players and operators with end to end broadcast solutions for all their global live, linear and non-linear digital media requirements. SatLink provides global TV satellite distribution; content management and playout services to leading broadcasters including: Thomson Reuters, Viacom (including Nickelodeon HD and MTV Base), Fashion TV, AP, euronews, ESPN and others.

SatLink will also be exhibiting its capabilities to provide end-to-end broadcasting solutions including Satellite uplink,

downlink and turnaround in HD, SD, 3D; Sports & News Occasional Use delivery; playout; content management, Digital Archival & TV channels localisation; productions, monitoring and various satellite engineering solutions.

**Thuraya Telecommunications Company**  
**Hall 2 booth no. 2.C23**  
[www.thuraya.com](http://www.thuraya.com)



**Thuraya Telecommunications Company** is an industry leading MSS operator and a global telecommunication provider offering innovative communications solutions to a variety of sectors including energy, broadcast media, maritime, military and humanitarian NGO. Thuraya's superior network enables clear communications and uninterrupted coverage across two thirds of the globe by satellite and across the whole planet through its unique GSM roaming capabilities.

The company's diverse range of technologically superior and highly reliable mobile satellite handsets and broadband devices provide ease of use, value, quality and efficiency. Thuraya remains committed to serving humanity through delivering the essential tools for optimal connectivity, never leaving anyone out of reach.

The Thuraya SatSleeve brings satellite communications to your iPhone within seconds. An industry first, the Thuraya SatSleeve enables you to stay connected using the tools you are familiar with. Simply dock the iPhone into the SatSleeve to ensure connectivity through phone calls and SMS via satellite mode, no matter where you are.



**SatSleeve Adaptor for iPhone 5**

The Thuraya SatSleeve brings satellite communications to your iPhone within seconds. An industry first, the Thuraya SatSleeve enables you to stay connected using the tools you are familiar with. Simply dock the iPhone into the SatSleeve to ensure connectivity through phone calls and SMS via satellite mode, no matter where you are.

Thuraya IP+ is engineered to deliver the fastest streaming speeds for a terminal of its class - allowing you to take advantage of reliable broadband access from locations covered by Thuraya's congestion-free satellite network.

**Walton De-Ice**  
**Hall 1 booth no. A62**  
[www.de-ice.com](http://www.de-ice.com)



**Walton De-Ice** designs and manufactures the broadest line of equipment

available for preventing the accumulation of snow and/or ice on satellite earth station antennas.

Walton De-ice offers several options for heating including, gas heaters with their economical operation advantages or the low maintenance Stainless Steel Electric Heaters.

At IBC 2013, Walton De-ice will be showcasing its new Rain Quake system specifically designed to reduce rain fade on Ka-Band antennas. During heavy rain conditions, Walton's Rain Quake can reduce rain fade by up to 20 times more.



**Work Microwave**  
**Hall 4 booth no. 4.B63**  
[www.work-microwave.de](http://www.work-microwave.de)

At IBC2013, WORK Microwave will showcase a wide range of innovative satellite communications technologies spanning various applications within the broadcast, satellite, and telco markets.

#### **DVB-S2 Modem, Modulator, and Demodulator Portfolio**

WORK Microwave will present its comprehensive portfolio of DVB-S2 modems, modulators, and demodulators. A key highlight will be the company's new video ACM system, which combines WORK Microwave's DVB-S2 Modem SK-DV with Adtec Digital's EN-91 MPEG-4 HD ultra-low delay encoder to improve an operator's video quality significantly while reducing operational expenses (OPEX). In addition to enabling continuous communication between the two devices via SNMP, the integration of the modem and encoder into one environment simplifies the setup and monitoring of parameters and options influencing bandwidth and link allocation.

#### **5th Generation Frequency Converter Series**



WORK Microwave will demonstrate further improvements to its fixed frequency block converters. New enhancements include Ka-band support for both uplink and downlink services. The Ka-band uplink uses frequencies between 25GHz and 32GHz while the downlink uses frequencies between 18GHz and 23GHz.

A sophisticated new synthesizer allows the frequency converters to deliver Ka-band signals with phase noise at a level that significantly exceeds the respected industry standard according to Intelsat Phase Noise Specification, IESS-308/309. The frequency block converters feature a compact, multichannel module design that enables operators to support up to four channels within a 19-inch housing, lowering their OPEX.

# Verticals and Horizontals: Satellite's Expanding Marketplace

by Martin Jarrold

**T**he 6th Annual Oil & Gas Communications South East Asia: Evolving the 'Big Data' Digital Oilfield for Offshore & Deep Water conference, the 19<sup>th</sup> event in GVF-EMP's overall global series, will take place on 19<sup>th</sup> & 20th November 2013 at the InterContinental Hotel, Kuala Lumpur, Malaysia.

The conference backdrop is the continuing priority of Southeast Asian nations and of countries across East Asia in respect of oil & gas industry policy, which remains, as for a number of years, tightly centered on ensuring national energy security and the injection of measures for continued national, and by extension, pan-regional, economic stimulus.

To slow hydrocarbons import dependency (and to boost energy security and maximize the potential for accelerated economic growth) the region's countries exhibit continuing interest in meeting as much domestic oil & gas demand as possible from home sources. Asia's offshore energy industry does have a significant enough potential to deliver on the need for assured domestically-sourced oil & gas supplies – on the basis of both continuing production from already operating fields and from the accelerated exploitation of newly discovered reserves.

In the shorter term, Asia's offshore exploration and production (E&P) environment will continue to be characterized by shallow water developments, and consequently CapEx on pipelines and fixed platforms will account for the most substantial proportion of the regional new infrastructure spend. How-

ever, in the longer term, in order to fully exploit the region's reserves, fresh oil frontiers are being opened up in deeper and more remote waters, and also in emergent hydrocarbons-production regions, such as the Philippines and Myanmar. Such developments are expected to greatly increase demand for subsea units and floating production units.

## High Throughput Satellites 2013:



**The Game-Changer in Action – The London Roundtable** will take place at the Strand Palace Hotel on 5<sup>th</sup> & 6th December 2013, delivering the third program in this GVF-EMP conference series. The Roundtable Series continues to offer a highly topical and timely platform for discussion, just as more satellite operators are bringing HTS capabilities to orbit and to the market.

**Today's satellite market is undergoing major quantitative shifts.** This is illustrated by the fact that only 10 years ago, a good year for the satellite communications industry was a terminal deployment total of some 80,000 units worldwide, whereas today, in just one

country, one service provider is now installing 30,000 terminals per month. Such metrics exemplify the increase in global broadband requirements, which are expected to continue to accelerate, driven by the globalization of business, the penetration of wireless communications, the need to be connected at all times, by demand driven by bandwidth-hungry mobility applications, the convergence of data and video due to the growing presence of smart phones in emerging regions, and requirements for broadband on commercial and government aircraft and on cruise and merchant vessels.

**Similarly, the satellite market is undergoing significant qualitative shifts** – shifts that are arising from moves towards high throughput satellite (HTS) technologies and services. More than half of the world's dozens of satellite operators have either ordered or plan to order high capacity satellites to

serve the 14 million households and 50% of enterprise terminals that are predicted to be using high capacity platforms by as soon as 2020. Many HTS satellite payloads, including the first spacecraft of new high throughput satellite constellations, have already been launched.

**HTS is not necessarily complex, but is often misunderstood.** Of course, a high throughput satellite is, essentially, a spacecraft with many times the throughput of a traditional FSS satellite for the same amount of allocated frequency on orbit. It takes advantage of frequency reuse and multiple spot-beams to increase throughput and reduce the cost



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per bit delivered. The **quantitative** and **qualitative** shifts referenced here have prompted questions about HTS, questions addressing the nature of high capacity and throughput levels, changes in pricing metrics, changes in the detail of service level agreements, and the capabilities of new-entrants to the value-added reseller (VAR) markets, as well as questioning the differences in, and relative merits of, high throughput technologies – variously using C band, Ku Band, or Ka band – in delivering various types of applications.

It is the misunderstandings, and these, and other, questions which **High Throughput Satellites 2013: The Game-Changer in Action** will explore, correct, and seek to answer in depth.

I intend to explore more details of these upcoming programs in future columns. For now I would like to point to a major innovation scheduled for 2014.

Additionally announced by GVF-EMP is **Connectivity 2014: Air, Water, Surface & Rail**, which will also take place in London, 11<sup>th</sup>-12<sup>th</sup> February 2014. This event will look at being connected to the Internet, whenever you want, wherever you are, wherever you're going to, and however you're getting there, with fast broadband data speeds.

Being “connected” as above, has become a universal mantra in the service delivery goals and user expectations of today's digital telecommunications marketplace. In the metropolitan workplace and in the urban or suburban home, the multiple-tens of Mbps service has become commonplace with the deployment of fixed fiber-based infrastructures by telecoms service providers. But, increasingly, for an ever-growing proportion of an ever-more demanding user base, this is not enough, particularly as the user-to-device/terminal relationship continues its migration away from interfacing with desktop/laptop PCs with local hard drive data storage and towards interfacing with tablets and smartphones with increasing volumes of data storage in



**In-flight broadband access is one of the emerging niche markets for satellites.**

*the Cloud.* This is a migration which places an overwhelming emphasis on the opportunity for Internet connectivity and access to multimedia services which meet the seemingly insatiable demand for increasingly video-based enterprise and social media applications, **while the user is entirely mobile**, whether pounding the urban street, taking a country stroll, riding a train, flying on a plane, or taking a trip across the sea.

This seamless connectivity expectation, and the objective of universalizing a seamless connectivity experience which goes way beyond the practical and commercially-sustainable geographical boundaries of today's 3G and 4G wireless networks, whether over public or private networks, is something that, at the practical deployment level, can only be achieved with a combination of different wireless telecommunications/broadband access technologies – a combination that will increasingly engage the most mobility-enhancing and nomadic communications technology of all, **satellite**.

**Connectivity 2014: Air, Water, Surface & Rail** will examine some of the key issues, technological developments, and market trends that feature on the path to a universal connectivity ecosystem, with particular, though not exclusive, reference to the latest develop-

ments in the satellite communications marketplace which are focused around the launch of high throughput satellite payloads into orbit. These payloads have already changed the paradigm of satellite communications capabilities in the realms of the satellite-only connectivity solution, but are also bringing a vastly enhanced dynamic to the wider realms of the satellite+terrestrial hybrid solution – solutions used in the corporate, enterprise, government, military, consumer, and other, sectors.

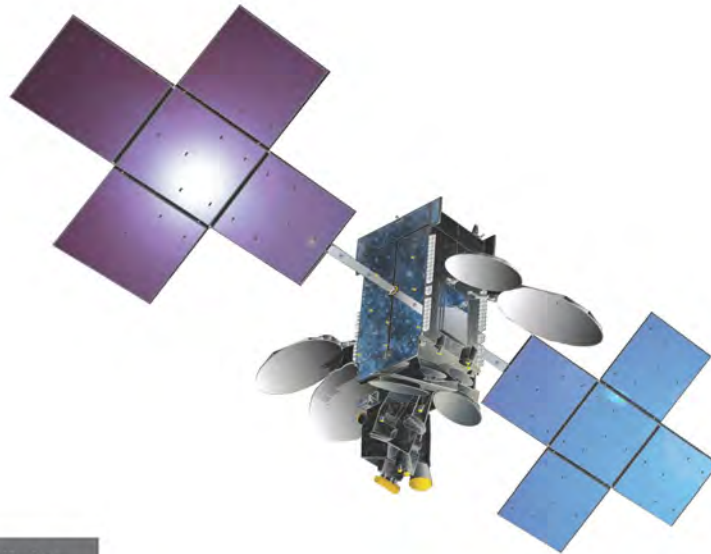
One key theme of the conference will center on the future of mobile backhaul. Satellite networking has always been an imperative for extending the typical service area of terrestrial cellular wireless systems, and connectivity for 2G/GSM voice and SMS applications, in many parts of the world, has been built on the foundation of backhaul over satellite. Now with those parts of the world migrating to 3G – and looking forward to 4G – we should ask, “What does 4G hold in store for mobile backhaul?”

Mobile network operators (MNOs) want new, innovative backhaul architectures that are robust and flexible enough to accommodate shifting traffic loads on cell sites without massive bandwidth over-provisioning. Importantly, MNOs are looking at the segmenting of macro-cells into smaller



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(femto-, pico-) cells, a trend presenting new challenges for the satellite backhaul vendor whose next-generation backhaul solutions must be more robust as well as high-speed.

Another key theme will examine the technologies used to bring earth stations on vehicles/mobile platforms (ESVs/ESOMPs) – whether they be rail, in-flight, or at sea – and the associated practicalities of driving RoI from solution deployments across train networks, fleets of aircraft, and cruise liners.

‘The Marriage of Mobility & Web 2.0’ will be a further theme to be examined in the context of asking “What will the

Satellite-Cloud Interface look like?” *The Cloud* brings together different technologies – broadband networks, virtualization, Web 2.0 interactivity, time sharing, and browser interfaces – each of them significant

advances in their own right, but all the more powerful in combination, and thus *the Cloud* is now fundamentally changing the way organizations use IT. The communications networks underpinning today’s distributed computing are not only fast, and not only getting faster, but the rate at which they are getting faster is itself speeding-up, creating opportunities for *Cloud* implementation to bring higher organizational performance, greater flexibility, and savings on costs.

So, what are the strengths and weaknesses inherent in current and developing satellite technologies as far as providing access to *The Cloud* is concerned? In posing this question, the conference objective is not to engage in a satellite-versus-terrestrial argument – particularly given the long-established trend of hybridized communications networks comprising satellite and ter-

restrial wireless technologies. Rather the objective is to identify exactly where the unique nature of satellite communications can contribute to the greater functionality, and reliability, and ubiquity, and connectivity to *the Cloud*, not only for the high-density metropolis of the globe’s most developed markets, but also for the remote communities of the world’s emerging and developing economies and societies.

Machine-to-Machine (M2M) communications is another key connectivity focus, and the interface and synergy of M2M communications and satellite communications will comprise part of

**“...the satellite market is undergoing significant qualitative shifts—shifts that are arising from moves towards high throughput satellite (HTS) technologies and services. More than half of the world's dozens of satellite operators have either ordered or plan to order high capacity satellites to serve the 14 million households and 50% of enterprise terminals that are predicted to be using high capacity platforms by as soon as 2020...”**

the conference dialog.

Naturally, this dialog must begin with at least a nod to immediate future-history, noting the longer-term significance of transitioning to Internet Protocol version 6 (IPv6). With the ever-increasing number of devices being connected to the Internet, and the consequent need for more IP addresses than the current IPv4 protocol is able to accommodate, the use of a 128-bit IP address permits more than  $7.9 \times 10^{28}$  times as many addresses as IPv4. But, why begin with this passing mention of IPv6? Well, because it is IPv6 which will bring on the full potential of the *Internet of Things (IoT)*, and it is the *IoT* which will be the ultimate realization of a future universal M2M environment which will far exceed the potential boundaries and limited scope of even the greatest reach of the present day M2M environment.

It is the *IoT* which will create a dynamic network of billions of wireless identifiable ‘things’ communicating with one another, bringing ubiquitous computing, and integrating the digital world and the physical world. More concretely, improved sensor device capabilities will facilitate business logic at the edges of networks as decision-making is based on real-time readings from sensors that are used to monitor pretty much anything and everything. Globally, satellite M2M is growing fast, and the aggregated target markets make its potential for the satellite industry very important.

The conference program will also touch on such connectivity issues as: Merging Broadband Satellite & Wireless into a Unified Value Chain; Satellite Broadband, Wireless & the Digital Citizen; Digital Citizen to Retail Consumer & m-Payer; *BYOD* – Connectivity across the Employment-Leisure Divide; Military Comms-on-the-Move/Comms-on-the-Pause.

For more information on all of the above please contact the Series organizers’. Their contact details are, with **GVF**, me at [martin.jarrold@gvf.org](mailto:martin.jarrold@gvf.org), and with **EMP**, Paul Stahl at [paul.stahl@uk-emp.co.uk](mailto:paul.stahl@uk-emp.co.uk).

Details of all the events can be accessed by following the individual event links from [www.uk-emp.co.uk/](http://www.uk-emp.co.uk/).

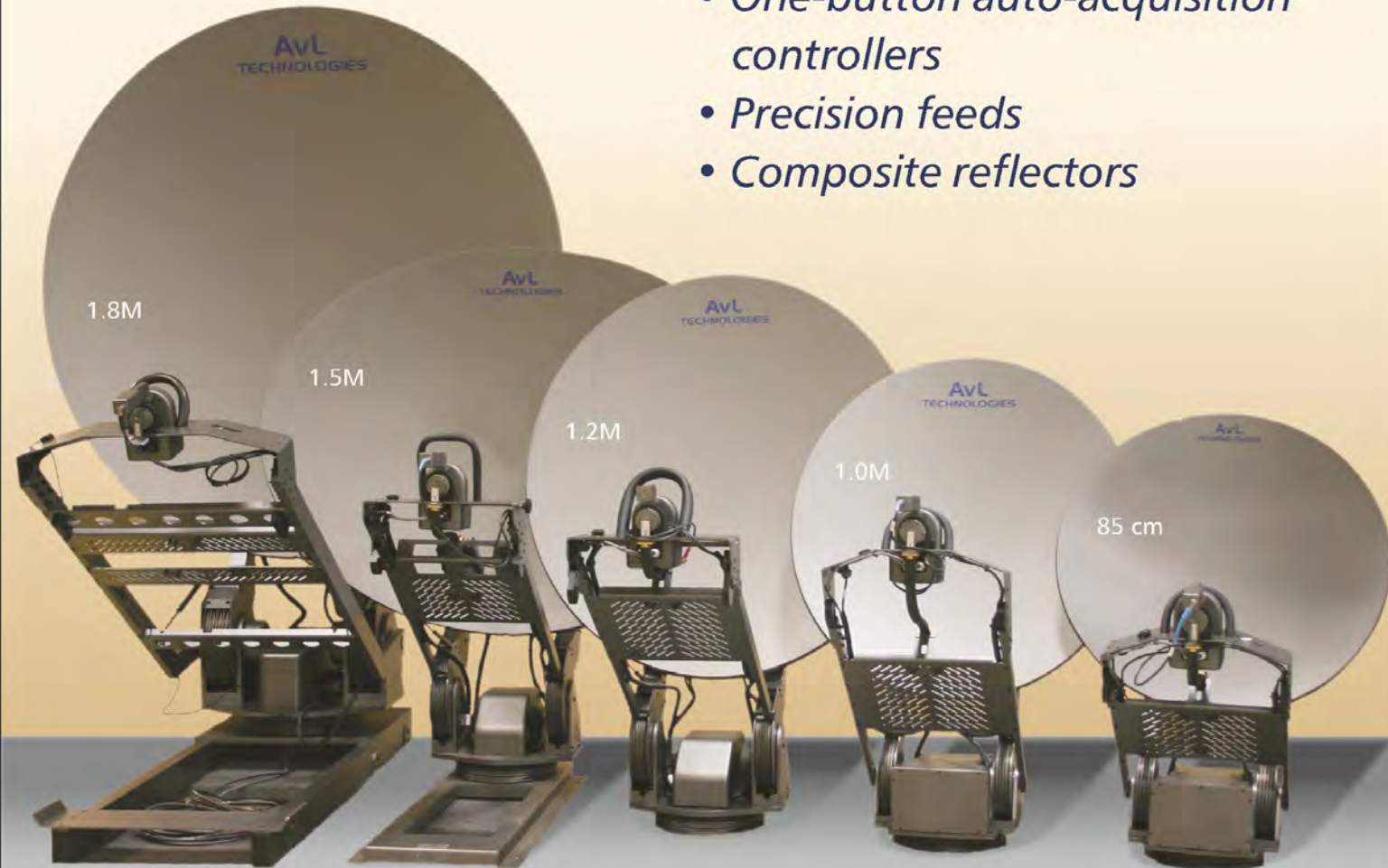


**Martin Jarrold** is Director of International Programs of the GVF. He can be reached at [martin.jarrold@gvf.org](mailto:martin.jarrold@gvf.org)

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**Harris Broadcast Appoints Steve Foreman President of Global Operations & Services; Jeff Liening, Sr. VP of Global Sales Operations**

Global supplier of content management and network infrastructure **Harris Broadcast** has announced plans to preview the new management team's vision and strategy by naming senior management appointments. **Steve Foreman** has been named president of global operations and services, and **Jeff Liening**, senior vice president of global sales operations.

Foreman brings a unique global track record in operations, transformation and supply chain management to Harris Broadcast. He joins the company from Texas Pacific Group (TPG) where he was senior advisor for seven years supporting management teams during strategic and operational transformations, including Freescale Semiconductor, Avaya and Armstrong Worldwide Industries.

Prior to joining TPG, Foreman was the senior vice president of professional services and delivery at E2open, the leading provider of supply chain software. Foreman was an executive at Solectron for more than eight years before E2open and participated in the company's growth from less than \$1B in revenue to over \$20B. Foreman holds both an MSE and an MBA with honors from the University of Washington, and a BA from the University of Pennsylvania in Mathematics and Economics.

Liening joins Harris Broadcast from GENBAND, where he was most recently senior vice president of global sales operations. Prior to GENBAND, he held various sales management positions at Sycamore Networks, Lucent Technologies, Ascend Communications and Cascade Communications.

**Conax Names Binderlechner as Representative for the D-A-CH Countries**

Content security provider **Conax** has

named **Andreas Binderlechner** as new Director of Area Sales for the German-speaking countries. Binderlechner will be responsible for development of business opportunities and expansion of sales of Conax Conditional Access and DRM solutions to cable, satellite, DTH and DTT operators, ISPs and telcos in the "D-A-CH" countries.



**Binderlechner**

The German-speaking countries — Germany, Austria, Switzerland — represent a highly significant market for distribution of pay-TV and Over-the-Top content with a cumulative population of over 90 million inhabitants.

Binderlechner comes from senior positions at strategic players in the market. He joins Conax from Envivio, and previously worked for Verimatrix and SeaChange.

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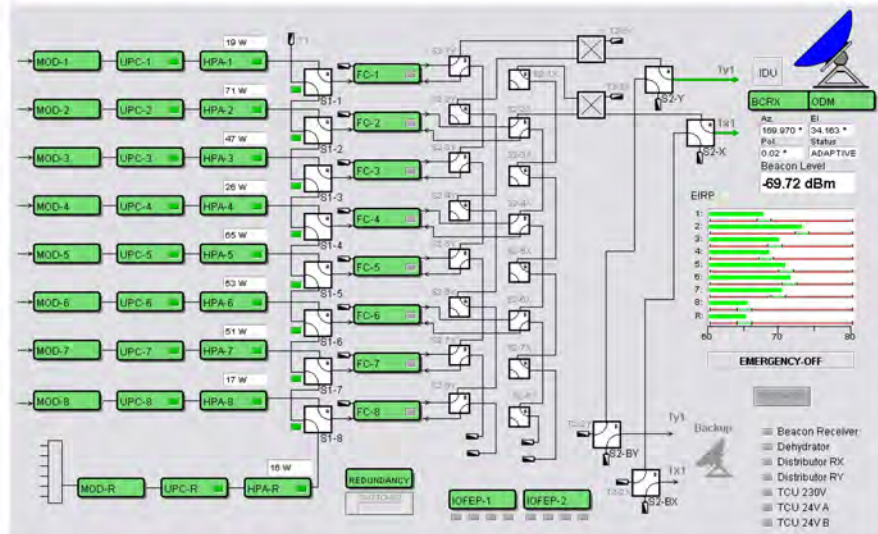
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## Newtec Appoints New Middle East Regional Sales Director

Former Siemens Enterprise Communications and Gulsat Communications executive **Eric Van Hoecke** has been appointed by satellite communications specialist **Newtec** to lead many of its sales activities in the Middle East.

Having spent 22 years with various responsibilities in satellite and enterprise communications, he brings to Newtec extensive marketing, sales and management experience. Van



**Eric Van Hoecke**

Hoecke will be in charge of Newtec business with its customers and partners in Iraq Lebanon, Kuwait and Saudi Arabia.

Van Hoecke will be leading Newtec's sales team in the Middle East from their offices in Dubai, UAE.

## Key Appointments at Vislink

**Vislink** announced a significant strengthening of its sales management staff with the hiring of **John Dulany** as Business Development Manager for the Broadcast Division and **Richard Harvey** as Product Line Manager for Satellite & Video Compression Solutions.

These additions are part of Vislink's ongoing strategy to enhance customer relationships and provide the best possible solutions for the future of live video collection and distribution, according to a company statement.

Dulany brings to the Vislink team 18 years of industry experience and expertise, including his most recent role as Vice President of Sales with Nucomm. John's primary focus will be to expand the reach of Vislink solutions and continue to grow Vislink's leadership posi-

tion within the broadcast market. With the addition of John, our six-man Broadcast sales team has 130 years of combined experience serving broadcast-

ers. Harvey will focus on increasing the visibility and sales of Vislink's satellite and video compression solutions in the Broadcast and Surveillance Satellite markets. In this role, Harvey will work closely with the Vislink sales and product development teams to create innovative solutions to meet the unique challenges of our industry. Richard joins Vislink from Fujitsu Frontech North America, where he was Manager of Product Management.

## Dalet Appoints Country Managers for Korea, India/Sri Lanka

Dalet Media Systems, a provider of Media Asset Management (MAM) solutions, software and services for content providers, announced the appointment of **Jaе Sun Ryu** as Country Manager, Dalet-Korea and **Vitalis Noble Martin** as Country Manager, Dalet-India & Sri Lanka.

Ryu, a seasoned industry professional with expertise in key account management, sales and support roles, leads the local Dalet team from the company's new office in Seoul. He most recently worked for SeaChange, handling a range of responsibilities over a 13-year span.

Noble, an India-based technology veteran with a proven track record in broadcast sales and project management, leads Dalet's customer initiatives in both India and Sri Lanka. His prior experience includes similar roles with KIT Digital and Shaf Broadcast, two of India's premiere integrators.

"These appointments affirm Dalet's commitment to the Korean and Indian markets and continue our pattern of growth in the Asia Pacific region. We have now implemented our MAM-driven solutions at key broadcasters in

the region, providing cost-efficient workflows for news, sports, program prep and archiving," says Tomer Azenkot, general manager, Dalet Asia Pacific.

## Foxcom Appoints US Regional Sales Managers

**Foxcom** announced that it has expanded its sales presence in the USA with the recent appointment of two regional sales managers. **Randy Witten** will serve as Director of Government Sales.

Witten brings more than 20 years' experience supporting commercial, civilian, DoD and the Intelligence Community.



**Randy Witten**

**Rod Stokes** will serve as Director of Sales in North and South America. Rod brings more than 15 years of successful enterprise and channel sales experience in the satellite / communications marketplace.

Jack Hotz, CEO of Foxcom said: "We are delighted to have Randy and Rod on board. With their many years of experience and sound knowledge of the satellite, broadcast and military sector, we look forward to seeing a significant ramp up in our US sales, and increased customer support."



**Rod Stokes**

Israel-based Foxcom, founded in 1993, provides RF-over-Fiber solutions to the commercial, government and military markets.

**Key industry trends and opportunities.**

## Despite Multiscreen Challenge, Set Top Box Market Continues to Grow

**D**espite the pay-TV industry's increasing focus on delivering services to alternative devices like PCs, smartphones and tablets, its traditional flagship platform-- the set-top box (STB)—continues to thrive, with market shipments set to hit record highs in 2013, 2014 and 2015, according to the latest IHS Set-Top Box Monitor report.

Global shipments of STBs used for cable, satellite, terrestrial and Internet protocol television (IPTV) digital TV services are forecast to climb to 269 million units this year, up 8 percent from 250 million in 2012, according to the latest IHS Set-Top Box Market Monitor report from information and analytics provider HIS.

Shipments will grow another 6 percent to 286 million in 2014 and by 1 percent to 290 million in 2015. The year 2015 will represent the peak of the market for the foreseeable future, as presented in the attached figure.

“STBs are facing a mounting challenge to their role at the dominant pay TV video consumption device because of operators' growing emphasis on supporting multiscreen devices,” said Daniel Simmons, senior principal analyst for TV technology at IHS.

“However, operators are continuing to deploy STBs in order to manage the compatibility between their delivery networks and the consumer electronics devices that consumers are increasingly using to view content now. As pay-TV operators rush to accommodate changes in delivery platforms and in video formats—including the adoption of high definition (HD)—STB shipments will continue to rise, hitting record levels for the next few years,” added Simmons.

### Multiscreen on the rise

Reports of the STB's imminent demise have been fueled by the increasing prominence of multiscreen devices.

For example, IHS in 2012 noted that STBs' domination of

the pay-TV market is set to come to an end, with multiscreen devices accounting for nearly half of all platforms obtaining television services from the largest operators by 2015.

Furthermore, pay-TV operators increasingly are focusing their attention on video delivery to multiscreen devices as they attempt to stave off the competitive threat posed by platform-agnostic over-the-top services like Netflix, Amazon and others.

However, this doesn't mean that STBs will stop being used—or even that their shipments will stop rising in the near term. In fact, IHS expects pay-TV operators to continue to deploy STBs and utilize them as a central platform for video services.

Ironically, the multiscreen phenomenon will help boost the STB market during the next few years, as operators offer multimedia home gateway (MHG) STBs that can deliver services to

PCs, smartphones, tablets and other devices, supporting the operator-as-an-app model.

### Gateway to growth

Furthermore, in mature markets where pay-TV digitization is complete or nearly finished, the transition to HD and MHG STBs will help to sustain volumes and increase revenue in 2013, 2014 and 2015.

The gradual migration to HD is continuing, with 2014 expected to be the first year when more than 50 percent of pay-TV boxes shipped globally can support HD.

These developments will allow STB industry revenue to grow to \$22.2 billion in 2013, making it the most valuable year in the history of the market.

Further in the future, the STB market will get a boost from the rollout of Ultra High Definition (UHD) services, IHS predicts.







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**Key industry trends and opportunities.**

## IPTV To Add 100 mil. Subs Globally

Covering 97 countries, the number of homes paying for IPTV will rocket to 167 million by end-2018, up from 69 million at end-2012 and from only 13 million at end-2008, according to a new report from Digital TV Research.

Simon Murray, author of the Global IPTV Forecasts report, said: "This means that IPTV penetration will exceed 10% of TV households by 2018, more than double the 2012 figure and up from only 1% in 2008. IPTV revenues [from subscriptions and on-demand] will grow to \$21.3 billion by 2018, up from US\$ 12.0 billion in 2012 and US\$ 2.8 billion in 2008."

From the 98 million subscribers to be added between 2012 and 2018, 71 million will be in the Asia Pacific region – or 73% of the new subscribers. Asia Pacific will account for 64% of global pay IPTV subscribers by 2018.

Half of the top 10 IPTV countries by subscribers were in the Asia Pacific region by end-2012. Already the world leader,

China will supply 76 million (46%) of the 2018 total, up from 23 million (33%) in 2012 and only 1.1 million (8%) at end-2008. India will contribute 4.7 million IPTV subscribers by 2018, up from only 153,000 at end-2012. Strong growth is also expected in Russia.

IPTV revenues will climb to \$21.3 billion in 2018, up from \$12.0 billion in 2012 and US\$ 2.8 billion in 2008. Asia Pacific's share of the global total will increase from 13% in 2008 to 34% by 2018 – just behind North America.

From the US\$ 9.3 billion additional revenues to be created between 2012 and 2018, the US will provide US\$ 1.9 billion. The Asia Pacific region will contribute an extra US\$ 4.0 billion, led by China (\$1.7 billion more) and Japan (\$1.1 billion). The US will remain the largest IPTV revenue earner by taking 30% of the 2018 total (down from a 40% share in 2008). France will drop from second place in 2012 to fourth by 2018. China will take second place in 2018, with revenues nearly quadruple the 2012 figure.

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 **Key industry trends and opportunities.**

## NSR Foresees Strong Satellite Operator Growth, but Cautions on Potential of Oversupply

**N**SR's *Global Assessment of Satellite Supply & Demand, 10th Edition* report projects commercial satellite operator revenues from transponder and bandwidth leasing will top US\$18.8 billion in the coming ten years, up from US\$11.2 billion in 2012. This strong growth comes from a mix of C, Ku and widebeam Ka-band transponder leasing gains in such diverse markets as DTH, video distribution and VSAT networking, generating some US\$4.5 billion in new revenues by 2022. A rapid emergence in HTS and MEO-HTS provisioned services like broadband access, backhaul and mobility should also add another US\$3.1 billion in wholesale capacity revenues.

Even with the positive growth projections, NSR raises real concerns about the potential negative impact of sustained supply growth on certain regional markets. "Our current projections are that global supply of C, Ku and widebeam Ka-band transponders will increase by over 30% by 2018, which is equivalent to more than 2,700 TPEs," stated NSR senior analyst and report author, Patrick French. "Further, NSR expects that global HTS and MEO-HTS supply will reach a phenomenal 2.3 Tbps by 2022, equal to over 450 'classic' C/Ku satellite payloads."

"While NSR clearly believes that demand exists for these

transponder and HTS/MEO-HTS supply increases", stated French, "there will also be winners and losers during this period of transition in the industry with battles being fought out application-by-application and satellite-by-satellite in each country and region around the world."

The *GASSD 10th Edition* study continues a decade of in-depth and highly detailed assessments of commercial satellite capacity supply and demand analysis as well as introducing another industry first, a comprehensive supply and demand assessment of emerging Medium Earth Orbit-High Throughput Satellite (MEO-HTS) constellations that will enter into commercial service in late 2013.

NSR's *Global Assessment of Satellite Supply & Demand, 10th Edition* provides a wealth of data and analysis from the very top line global trends to highly detailed and granular assessments of supply and demand trends for eight separate applications in each of five different types of capacity (C-band, Ku-band, widebeam Ka-band, HTS, MEO-HTS) for twelve individual regions. Supplemented by over 450 tables and charts within the integral client Excel data sheets, the report provides the most comprehensive and detailed data and analysis available to the industry.



## One-fourth of All Homes to Have Satellite TV by 2018



**C**overing 97 countries, the number of pay satellite TV (DBS or DTH) homes will reach 251 million by

2018, up from 178 million at end-2012 and 103 million at end-2008, according to a new report from Digital TV Research.

From the 73 million pay satellite TV subscribers added between 2012 and 2018, India will provide 24.4 million, Brazil 9.2 million, Indonesia 6.8 million and Russia 5.9 million. However, the

Global Satellite TV Forecasts report estimates that pay satellite TV subscriber totals will fall in 11 countries between 2012 and 2013 as subs convert to other platforms. India will lead the pay satellite TV sector with 61.1 million subscribers in 2018, followed by the US.

India overtook the US in 2012 to take top slot. Brazil and Russia will take third and fourth places respectively. The US will remain DTH market leader by revenues generated, although its share of the total will fall from 43.5% in 2012 to 38.7% in 2018. Brazil will add the most DTH revenues (\$3.5 billion) between 2012 and 2018 – nearly doubling its total in the process.

However, satellite TV revenues will decline for 20 countries between 2012 and 2018. Much of this is due to greater competition forcing satellite TV platforms to offer cheaper packages which will lead to lower ARPUs. Furthermore, low-cost DTH packages are making a significant impact in several countries.

Including free-to-air households, nearly 400 million homes will directly receive TV signals via satellite dishes by 2018, up by almost 100 million on the end-2012 figure. India will be responsible for adding 30 million over this period. A quarter of global TV households will have a satellite TV dish by 2018, up from 21% in 2012 and 14% in 2008.



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# Globecomm Tech Forum 2013 Focus on Profiting from Disruptive Change

by Virgil Labrador, Editor-in-Chief

This year's edition of Globecomm's Tech Forum 2013 focused on "Profiting on Disruptive Change" and examined new revenue opportunities, enhanced efficiencies, and reduced OPEX in mobile, media and entertainment, and the technologies that drive disruptive technologies. The Tech Forum was held from August 4-6, 2013 at Globecomm Headquarters in Hauppauge, New York, USA.

The one-day Tech Forum conference explored the latest market changes, regulatory hurdles, growth opportunities and technology options in two main tracks: Mobile and Wireless and Digital Video, and in the expanding zone in which they overlap.

In the Keynote panel on "The Evolution of Media and Entertainment: Global, Mobile, Interactive and Social," Chris Wagner, EVP - Marketplace Strategy of Nevion outlined the evolution of broadcasting from a one way medium to an interactive medium.

Jesper Knutsson, VP-Sales, North America of NDS said that over the top technology (OTT) is moving from a niche product to a mainstream product. It leads to new monetization schemes, some good some bad. Splits are occurring in various areas of the market, including in the revenue streams and in audience segments. Broadcasters, large and small have to cope with these

changes, said Knutsson.

In the panel discussion on "Greater Flexibility, Lower Cost from Satellite, Terrestrial and IP Convergence," Tong Yu, Director Marketing Solutions of Harmonic presented the results of a survey they did with 6,000 broadcasters and 500 service providers. The main concerns of those surveyed include: multiscreen delivery; the transition to HD; IP delivery and workflow optimization. Among the technology

experience. Content is being taken into different directions as consumers demand what content, when they want to see it, where they want to see it in what format and even what they want to pay for the cost. This revolution is viewed as "disruptive change" by some and a unique opportunity by others.

The consensus among the speakers was that tipping point towards the new disruptive media has already reached by the so-called "millennials" the 18-35

demographic and is definitely the wave of the future. But as Lou Zacharilla, Executive Director of the Society of Satellite Professionals International, who chaired the closing session summarizing the conference said "if you ride a wave, you always take the risk of banging your head doing it."

So, it's important to have a strategy on how to approach and successfully implement new technologies. The conference certainly provided strategies not

only to cope with disruptive change but to thrive in it.

To view videos of the proceedings and access the presentations of the conference go to:

[www.globecommsystems.com/techforum.shtml](http://www.globecommsystems.com/techforum.shtml)

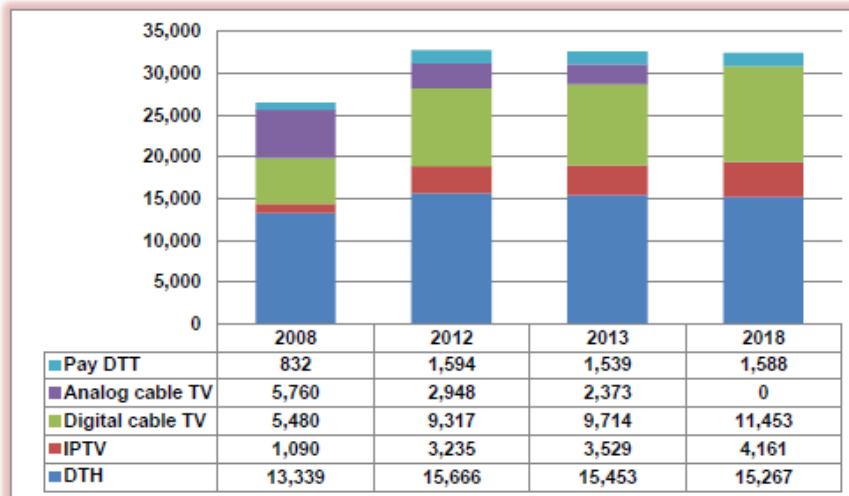


**The one-day Tech Forum conference explored the latest market changes, regulatory hurdles, growth opportunities and technology options in two main tracks: Mobile and Wireless and Digital Video. If you were unable to attend the conference, you can still view for free the videos of all the panels at [www.globecommsystems.com/techforum.shtml](http://www.globecommsystems.com/techforum.shtml)**

trends that those survey identified include: the new High Efficiency Video Coding (HEVC) standard; OTT; High Throughput Satellites (HTS) and Ultra HD, among others.

From the many sessions during the conference was one the recurring themes was that the market is being driven by consumers and they demand a more individualized experience--a unique

Western Europe pay TV revenues by platform (\$ million)



Source: Digital TV Research Ltd

The number of pay TV subscribers in Western Europe increased by 1 million in 2012 to 94.1 million, and will climb by another million in 2013, according to a new report from Digital TV Research. The number of pay TV subscribers in the region will top 100 million by 2018 – up by 6.9% since 2012. This comes despite the loss of 15.9 million analog cable subs over the same period. Digital cable will grow by 14.7 million subs and IPTV will climb by 6.5 million. However, pay DTH subs will only increase by 2.5 million. Pay DTT subscriptions will fall by 187,000 to 7.4 million.

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Company Name	Symbol	Price (Sep. 04)	% Change from Last Month	52-wk Range		% change from 52-wk High	
<b>Satellite Operators</b>							
Asia Satellite Telecommunications	1135.HK	29.50	-4.53%	26.85	31.20	↓	5.45%
Eutelsat Communications S.A.	ETL.PA	23.08	10.22%	20.41	28.15	↓	18.01%
APT Satellite Holdings Ltd.	1045.HK	7.59	12.95%	1.74	7.77	↓	2.32%
Inmarsat Plc	ISAT.L	740.50	2.85%	534.50	749.00	↓	1.13%
SES GLOBAL FDR	SES.F	22.00	1.52%	20.593	25.00	↓	12.00%
<b>Satellite and Component Manufacturers</b>							
The Boeing Company	BA	106.37	-1.42%	69.03	109.49	↓	2.85%
COM DEV International Ltd.	CDV.TO	4.21	7.95%	2.83	4.35	↓	3.22%
Lockheed Martin Corporation	LMT	124.27	0.40%	85.88	126.73	↓	1.94%
Loral Space & Communications, Inc.	LORL	65.97	4.02%	51.91	85.84	↓	23.15%
Orbital Sciences Corp.	ORB	17.56	-4.82%	11.9	19.33	↓	9.16%
<b>Ground Equipment Manufacturers</b>							
C-Com Satellite Systems Inc.	CML.V	1.79	1.70%	0.60	1.90	↓	5.79%
Comtech Telecommunications Corp.	CMTL	24.70	-9.52%	22.33	29.25	↓	15.56%
Harris Corporation	HRS	58.22	1.93%	41.08	58.50	↓	0.48%
Honeywell International Inc.	HON	80.96	-4.39%	57.23	84.85	↓	4.58%
ViaSat Inc.	VSAT	64.82	-4.44%	34.67	73.43	↓	11.73%
<b>Satellite Service Providers</b>							
Gilat Satellite Networks Ltd.	GILT	4.78	-8.95%	3.06	6.20	↓	22.90%
Globecomm Systems Inc.	GCOM	13.95	-3.59%	10.11	14.91	↓	6.44%
International Datacasting Corporation	IDC.TO	0.20	2.56%	0.16	0.25	↓	20.00%
ORBCOMM, Inc.	ORBC	4.72	-3.28%	2.97	5.40	↓	12.59%
RRSat Global Communications Network Ltd	RRST	8.06	0.37%	5.06	9.35	↓	13.80%
<b>Consumer Satellite Services</b>							
British Sky Broadcasting Group plc	BSYBY	53.99	4.96%	45.74	54.88	↓	1.63%
DIRECTV	DTV	58.38	-4.93%	47.71	67.85	↓	13.96%
Dish Network Corp.	DISH	45.86	1.42%	30.10	46.89	↓	2.20%
Globalstar Inc.	GSAT	0.6350	5.83%	0.25	0.71	↓	10.56%
SIRIUS XM Radio Inc.	SIRI	3.69	-3.91%	2.33	3.85	↓	4.16%

INDEX	Index Value (Sep. 04)	% Change from Last Month	% Change Jan. 03, 2013
Satellite Markets 25 Index™	1,565.81	0.91%	22.78%
S & P 500	1,653.08	-3.31%	13.27%

The Satellite Markets 25 Index™ is a composite of 25 publicly-traded satellite companies worldwide with five companies representing each major market segment of the industry: satellite operators; satellite and component manufacturers; ground equipment manufacturers; satellite service providers and consumer satellite services. The base data for the Satellite Markets Index™ is January 2, 2008--the first day of operation for Satellite Market and Research. The Index equals 1,000. The Satellite Markets Index™ provides a benchmark to gauge the overall health of the satellite industry.

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