

Say Goodbye to Boundaries

by Robert Bell, Executive Director, SSPI & WTA

"Good fences make good neighbors," wrote American poet Robert Frost. Now there's a man who understood human nature. We like to think of ourselves as flexible, adaptable, global citizens - but take us out of our accustomed cave for too long and we get anxious.

Which is too bad. Because if the past couple of years are any guide, we in the satellite industry need to say goodbye to boundaries. For most of its 50-year history, satellite communications has lived in a silo. Broadcast video was the dominant application, while proprietary satellite networks served retail and other businesses with many locations. Terrestrial telecom people didn't understand us and didn't particularly want to.

With the widespread adoption of IP, however, the walls have begun coming down. Increasingly, it is the IT department, not broadcast engineers, who call the shots at our media customers. That makes sense at a time when incoming news feeds may travel through a broadband connection from the reporter's hotel as well as via satellite. Government, military and business customers are demanding that satellite become a seamless part of terrestrial fixed, mobile and wireless networks.



These days, calling us the satellite industry is like calling Superman a good-looking guy in tights. Accurate, sure, but it kind of misses the point.

These developments offer new opportunities, but also challenge us to raise our game. Which is why human nature can be a problem. Satellite professionals and customers are trying to figure out an increasingly puzzling, unpredictable market. One way to react is to put up the blinders, focus on business as usual, and hope that it all passes. The other way is to embrace what makes us uncomfortable and see where it takes us. What we choose will help determine the future of our business - whatever we want to call it.

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Key Multiplatform Battle Grounds Take Shape

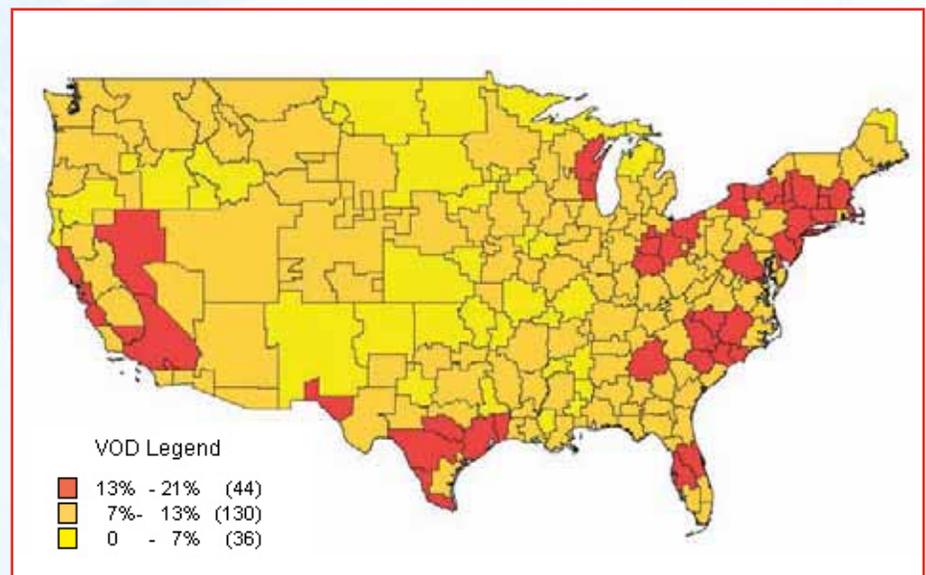
by Evie Haskell, *The Bridge*

As cable operators continue to battle for multiplatform subscribers across the U.S., they're touting video on demand (VOD) services as a key weapon in their arsenals. Here the multiple system operators (MSOs) believe they can trump satellite services by offering their subscribers thousands of hours of on-demand programming, including movies, network programming and original, VOD-only programming.

By the end of 2006, cable operators claimed that more than 40% of the nation's households had access to VOD via digital cable services. In December alone, Comcast said it delivered 180mn

streams of VOD programming across its footprint – and that its digital cable subscribers viewed some video-on-demand stream on an average of 27 times per month.

So where is all this VOD activity taking place? The multiplatform data cube developed by the CentrisBRIDGE project allows a detailed (down to census block) look at voice, video and data services deployed across the US. The map below takes a DMA by DMA look at cable VOD availability as a percent of households at the end of 2006. Not surprisingly, the heaviest VOD deployments are found in major population centers along both coasts, in the Midwest and Texas.



The CentrisBRIDGE data cube comes about as a result of the collaboration between Media Business Corp's BRIDGE Data Group and Centris. Media Business Corp also publishes multiplatform industry e-news products including: *The BRIDGE*, *Sky-REPORT*, *The Morning BRIDGE*, *The Evening BRIDGE* and *The Retail BRIDGE*. For more information, please go to: <http://www.thebridgemediagroup.com> or <http://www.thebridgedatagroup.com>.

IPTV and Mobile Content:

The Two New Killer Apps

by The Carmel Group's Jimmy Schaeffler

Every few years, a reassessment of the telecom landscape is warranted. Circa mid-2007, that view would clearly place two newcomers on the list, or at least two major players which were not there three or more years ago. Those two include video content delivered to mobile devices and Internet Protocol TV (IPTV). Between them, it is difficult to

see a life of an American that will not be impacted in the next ten years.

IPTV Innovations

Our recent projections of IPTV users shows worldwide there will be an estimated 41mn users of IPTV services by year-end 2010. Several overseas players, including those in Asia and Europe, are already leading the move to IPTV globally. France alone today is at the top of the

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Hybrid Nets, Broadband & Military Spur Growth

by *Virgil Labrador, Satnews Publishers*

The satellite industry has been posting consistent growth in the last few years and industry watchers seem to agree that the growth marks the beginning of a trend that will continue for years to come. The Washington, D.C.-based Satellite Industry Association (SIA), together with research firm Futron Corporation, is expected to affirm the positive outlook of the industry overall when it presents its annual "State of the Industry" report on Thursday here at ISCe 2007.

Demand for satellite capacity and services are being driven by the growth in broadband services, hybrid networks, HDTV, IPTV, Mobile TV and other bandwidth-intensive services. The Teal Group believes the commercial satellite industry is on the verge of a growth cycle that might extend well into the next decade, in contrast to the downturn it experienced from the late '90s

through the earlier part of this decade.

"Last year marked the second consecutive year of growth in the number of commercial communications satellites launched to geostationary orbit," said Marco Caceres, Teal Group senior space analyst. "This hasn't happened in at least the past 20 years, and it may signal the start of an up cycle for the overall market."

Teal also estimates orders for more than 200 geostationary commercial communications satellites worth more than \$25bn through 2016. Orders for more than 100 low earth orbit mobile communications replacement satellites are expected to gen-

erate up to \$4bn in business. Next-generation US military satellite programs are estimated at a total cost of \$100bn. Despite the US military's buildup of its own satellite systems over the next ten years, its reliance on commercial satellite capacity for the shortfall in demand is expected to continue.

The growth in consumer broadband satellite services with the successful launch of the Ka-Band Wildblue service in North America and the IPStar service in Asia are also seen as encouraging indicators that might lead to other successful

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6th Annual Event

ISCe Conference Offers Increased Opportunities

The 6th Annual ISCe International Conference & Exposition opens today with a broader program and greater opportunities for learning, sharing and networking for delegates and participants from the commercial and military sectors. This year also features an expanded exhibits area and beefed-up offering on the military side.

"As the premier West Coast event for the commercial satellite industry, we are pleased to be working with key industry players, co-hosts and the Navy PEO at SPAWAR on our programming and look

forward to discussing the most relevant topics facing our business during this week," said Art Paredes, President & CEO of Hannover Fairs USA, ISCe's event organizer. "I urge all of you to take advantage of the great line-up of diverse sessions with the best known names in our industry as well as the numerous social functions planned during the next several days and our expanded exhibit hall."

Finally, this year ISCe also debuts the *ISCe Daily News* to capsule event and industry news for you during the next four days. Look for it each morning and via e-mail.

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