

The Top Teleport Operator Rankings of 2005



The Top Operator rankings are developed by surveying teleport operators in many nations on their facilities, services and business results. Some of this information is proprietary and is provided to WTA in confidence. The Top Operator rankings protect the confidentiality of this data while providing useful information to the industry.

The Top Operators of 2005 are ranked in three categories:

- **The Global Top Ten**, which ranks companies based on the revenue from all sources and includes *all* companies that operate teleports: independents, satellite carriers and technology providers.
- **The Independent Top Ten**, which ranks companies based on revenue from all sources but excludes companies whose primary business is satellite fleet operations.
- **The Fast Ten**, which ranks companies based on year-over-year revenue growth in their most recent complete fiscal years, and which includes *all* companies that operate teleports.

By ranking companies in these three ways, WTA seeks to reflect the realities of the marketplace. The past few years have seen the teleport sector become increasingly diverse. Once made up solely of independent operators of ground segment, teleports are now operated as well by national and international satellite carriers, technology providers, systems integration companies and specialized service providers. They pursue many different business models, but all look to their teleports as key platforms for providing value-added service. Of the companies that provided data to the 2005 Top Operators process, 33% own their own satellites, while 67% do not. Our rankings recognize that, to some extent, every teleport operator competes in the same marketplace – the biggest with the smallest – but that like all marketplaces, the teleport sector has segments in which even the smallest players can compete effectively and achieve strong growth. For more information on the teleport sector, see the end of this report.

The Global Top Ten of 2005

In order from largest to smallest, the Global Top Ten of 2005 are:

1. **SES Global** (Luxembourg) SES Global is a network of satellite operators reaching 95% of the world's population, operating mainly through SES ASTRA in the EMEA region and SES AMERICOM in the Americas, which together own 28 satellites and multiple teleports in the US and Europe.
2. **Intelsat** (Bermuda) Through a global fleet of 28 satellites and teleports based in the US, Europe and Asia, Intelsat offers communications services and managed solutions to customers in approximately 200 countries and territories.
3. **Eutelsat** (France) Eutelsat provides capacity on 23 satellites that offer television and radio broadcasting for consumers public, professional video broadcasts, corporate networks, Internet services and mobile communications, and operates teleports and uplink facilities in more than a dozen European countries.



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4. **PanAmSat** (USA) PanAmSat Corporation operates a global network of 22 in-orbit spacecraft reaching 98% of the world's population and offers teleport services through five US teleports.
5. **GlobeCast** (France) A subsidiary of France Telecom, GlobeCast is a content management and delivery company operating a network of teleports and fiber to manage and transport 10 million hours of video and other rich media yearly.
6. **Telesat Canada** (Canada) Telesat operates a fleet of satellites and a network of six teleports in Canada, the US and Latin America for the provision of broadcast distribution and telecommunications services.
7. **Loral Skynet** (USA) Loral Skynet creates customer solutions using satellites over Asia, Europe and the Americas, a global fiber network, and teleports across the USA.
8. **NewSkies Satellites** (Netherlands) New Skies Satellites owns and operates five geostationary communications satellites and multiple teleports in order to offer global coverage for the delivery of video, Internet, voice and data transmissions services.
9. **Arqiva Satellite Media Solutions** (UK) With teleports and other facilities throughout the greater London area, Arqiva provides permanent and occasional broadcast services as well as IP, voice, data and digital media networks
10. **Vyvx** (USA) With more than 16 years of experience with mission-critical content, Vyx provides fiber-optic and satellite video delivery solutions through multiple transmission formats and platforms, including three US-based teleports.

The Independent Top Ten of 2005

In order from largest to smallest, the Independent Top Ten of 2005 are:

1. **GlobeCast** (France) A subsidiary of France Telecom, GlobeCast is a content management and delivery company operating a network of teleports and fiber to manage and transport 10 million hours of video and other rich media yearly.
2. **Arqiva Satellite Media Solutions** (UK) With teleports and other facilities throughout the greater London area, Arqiva provides permanent and occasional broadcast services as well as IP, voice, data and digital media networks
3. **Vyvx** (USA) With more than 16 years of experience with mission-critical content, Vyx provides fiber-optic and satellite video delivery solutions through multiple transmission formats and platforms, including three US-based teleports.
4. **Schlumberger Global Connectivity Services** (USA) Formerly known as DMS, Schlumberger Global Connectivity Services provides secure enterprise network services via satellite and terrestrial systems to oil and gas exploration and production facilities around the world.
5. **Ascent Media Network Services** (USA) Through facilities in Southern California, New York, London, Singapore and other locations, Ascent Media provides solutions for content creation, management and – through its Network Services group – distribution of motion pictures, television and radio programs.



6. **ND SatCom** (Germany) ND SatCom is a global supplier of satellite-based broadband VSAT, broadcast and military communication network technologies and services for broadcast, enterprise, telecom, media, government and military environments, with teleports based in Europe.
7. **CapRock Communications** (USA) Through teleports in the Americas, Europe and Asia, CapRock delivers network services to the world's harshest and most remote locations, including oil & gas platforms, ships, construction & mining sites, and emergency/military operations.
8. **Globecomm Systems** (USA) GSI integrates satellite into network applications in order to offer total solutions incorporating systems design, integration, operation and service delivery via its own US-based teleport.
9. **Agiosat Global Communications** (USA) Agiosat provides satellite-based, communication and network technologies and services through its own teleports and telecom facilities as well as shared infrastructure.
10. **ATCi** (USA) ATCI provides technology and services for the delivery of video content from its Chandler, Arizona teleport to the cable head-end, where its Simulsat full-arc multibeam antenna can receive signals from up to 35 satellites.

The Fast Ten of 2005

Size is one way to understand to understand the teleport sector. Momentum is another. The Fast Ten ranking celebrates companies that have achieved a high rate of year-over-year revenue growth in their most recent fiscal years. Starting from the fastest of the fast, the Fast Ten of 2005 are:

	<u>Rate</u>
1. Agiosat Global Communications (USA) Agiosat provides satellite-based, communication and network technologies and services through its own teleports and telecom facilities as well as shared infrastructure.	300%
2. PROTEL (USA) PROTEL provides professional broadcasting services to television stations, corporations, government and news organizations, including SNG services, with a hub teleport in Homestead, Florida and fixed and mobile earth stations worldwide.	150%
3. CapRock Communications (USA) Through teleports in the Americas, Europe and Asia, CapRock delivers network services to the world's harshest and most remote locations, including oil & gas platforms, ships, construction & mining sites, and emergency/military operations.	78%
4. Redwing Satellite Solutions (UK) A subsidiary of Bandwidth Technologies International Group, Redwing Satellite Solutions offers VSAT and Mobile satellite communications services via Inmarsat, Iridium and its greater London teleport.	74%
5. UpLit (USA) New Orleans-based UpLit offers reliable, complete connectivity in the Gulf South, from simple broadcast uplinks to custom-designed and integrated satellite and fiber solutions for video, voice, and data.	52%
6. Loral Skynet (USA) Loral Skynet creates customer solutions using satellites over Asia, Europe and the Americas, a global fiber network, and teleports across the USA.	48%



7. **Globecomm Systems** (USA) GSI integrates satellite into network applications in order to offer total solutions incorporating systems design, integration, operation and service delivery via its own US-based teleport. 22%
8. **ND SatCom** (Germany) ND SatCom is a global supplier of satellite-based broadband VSAT, broadcast and military communication network technologies and services for broadcast, enterprise, telecom, media, government and military environments, with teleports based in Europe. 20%
9. **ATCi** (USA) ATCI provides technology and services for the delivery of video content from its Chandler, Arizona teleport to the cable head-end, where its Simulsat full-arc multibeam antenna can receive signals from up to 35 satellites. 20%
10. **Intelsat** (Bermuda) Through a global fleet of 28 satellites and teleports based in the US, Europe and Asia, Intelsat offers communications services and managed solutions to customers in approximately 200 countries and territories 10%

About the Teleport Sector

Commercial teleport operators make up a distinct market segment with annual revenues of \$13 billion, which is a channel for 15% of world satellite communications revenue. The basic, bent-pipe transponder circuit is the foundation of space-based communications – but it is the teleport sector that is primarily responsible for adding value to that circuit. Once providers of basic uplinking and downlinking services, teleports have evolved into providers of complex solutions ranging from TV program production and post-production to content hosting and distribution, systems integration to network management. Depending on the needs of customers, today's teleport operators may provide –

- **Origination and distribution of TV channels** to network affiliates, cable MSOs and DTH satellites in both real time and via store-and-forward
- **Television and radio program** production, post-production and hosting
- **Narrowcast DTH services** provided on a turnkey basis (program origination, subscriber sales, installation, billing and customer service) to ethnic and other narrow TV markets
- **Hybrid enterprise and government network integration and connectivity** to link remote facilities into the enterprise network for oil & gas exploration and production, mining, aid and disaster relief efforts, and other applications
- **Distribution of high-value data and video feeds** to closed distribution networks for financial services, hotels, retail stores and malls, bars and restaurants, and other specialty markets
- **Digital content development, management and distribution** through multiple private and public networks
- **Distance education and training networks** for enterprises and government
- **Internet and VoIP backbone services** to ISPs, enterprises and government
- **Mobile telephony backhaul** in regions underserved by fiber



About World Teleport Association

Since 1985, the World Teleport Association (WTA) has been the only trade association that focuses on the business of satellite communications from the ground up. At the core of its membership are the world's most innovative operators of teleports, from independents to multinationals, niche service providers to global hybrid carriers. WTA is dedicated to helping teleport operators to improve their operations, develop their markets and grow their businesses within the \$13 billion teleport sector of the global satellite industry. Companies that do business with teleports also find that WTA is the best investment they can make to open new channels to the industry.

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