Shaping the Future of Satellite Communications
Next Generation Video Networks

Everyone is talking about multiservice networks, automated workflows, hybrid networks and new industry standards (e.g. UHDTV, DVB-S2X).

Just buzzwords? With the help of our 3rd industry survey, we at Newtec were interested in the thoughts of our customers and business partners:

- In what direction is the industry moving?
- How is the satellite-terrestrial mix changing?
- What investment plans are being made as a result?

This booklet will provide you with the answers to these questions.

We would like to give a big thank you to the 270 participants who completed our 3rd industry survey, which ran over three weeks in August 2014.
What’s your job function?

The majority of the participants are forward-looking and visionary people: 72% are in C-level positions, in engineering or in marketing.

Where is your company based?

The survey includes participants from all regions around the world.
What is the principal industry segment of your organization?

The participants are a good mix of satellite operators, service providers and end-users. Almost 10% of the participants are in media or advisory positions.
How many (D)SNG fly-away/vans do you have in your fleet?

The majority of the broadcasters have less than six SNG vans in their fleets. 1/3 has 6-20 vans. Only 11% have more than 21 vans.
How important are the following costs?

Importance of satellite segment costs as part of the OPEX

- Very important: 63%
- Somewhat important: 28%
- Somewhat unimportant: 7%
- Very unimportant: 2%

Importance of staffing costs as part of the OPEX

- Very important: 55%
- Somewhat important: 41%
- Somewhat unimportant: 2%
- Very unimportant: 2%

Even though the participants rate the satellite segment as a very important part of the OPEX, the overall cost of staffing is more important.
How much satellite capacity do you use (36 MHz Transponder Equivalents (TPE))? 

- There is a good mix between low and high satellite transponder usage.
How many Occasional Use (OU, temporary) transmissions do you handle over satellite per month?

2/3 of the broadcasters have up to 50 occasional use transmissions over satellite per month.

How much spare satellite capacity do you have?

High number of participants have spare capacity: 41%.
Satellite for Occasional Use (OU, temporary) services today and in three years?

Satellite for Occasional Use (OU) will remain very relevant. However, there is a shift:

- 53% of the operators using satellite only (100%) today, will use alternatives (e.g. terrestrial transmissions) in the future.
- 21% of those who are using satellite for more than 50% will decrease their usage in the future, while 10% will increase their satellite usage.
- 65% of the operators using satellite for less than 50% will continue to do so.
- New operators, who think about starting new OU services, plan to use satellite up to 50%.
Mix of live and file based transmissions today and in three years?

Going from 22% for using live only transmissions, there is a clear shift for adding file-based transmission within three years from now (88%).
Investment priorities in the near future?

- Upgrading Transmission to HDTV
- Upgrading Transmission to DVB-S2
- Broadcast Workflows for Live TV
- Broadcast Workflows for File
- Network & DSNG/FNG Fleet Automation
- Upgrading Transmission to DVB-S2X
- Multiservice Platforms (single network for video, data and voice)
- Single Management System for the Whole Network
- Media Asset Management
- Upgrading Transmission 4K/UHDTV
- Bi-directional Communications (VSAT)
- Back Office Systems (scheduling, OSS/BSS, billing, …)

Broadcasters will continue to invest in transmission upgrades for HDTV and DVB-S2; later to DVB-S2X. There is a huge investment in broadcast workflows, automation and multiservice networks.
What new services will you add in the near future?

82% of the participants will add new services to their network in the near future. The majority of the to-be-added services require bidirectional satellite connectivity (e.g. VSAT).
What would be your reasons NOT to opt for a multiservice platform?

Almost 40% do not see objections. 18% of the broadcasters have concerns about sharing the network and the service quality. 21% think a multiservice platform is too complex or not manageable end-to-end.

Within what time frame will you be implementing DVB-S2X?

Within one year, a quarter of the industry will be using DVB-S2X.
What is your most compelling reason to implement DVB-S2X?

- 58% will use DVB-S2X to get higher throughput, to launch UHDTV services or to reduce costs.

- Reduce costs of bandwidth (reduce cost per channel or reduce overall space segment)
- I need more throughput in my network
- I want to launch UHDTV services
- I don’t know what the benefits are
- Reduce the cost of my antenna and RF electronics
- Improve my service availability without additional cost
- It becomes mandatory (because of regulations)
- It is a natural evolution

When do you think you’ll be UHDTV ready?

- Only a small percentage is now ready for UHDTV, which will change in over a year’s time.
MULTISERVICE NETWORKS

A multiserivce network shares a single network infrastructure across multiple applications and services.

We at Newtec offer you our Newtec Dialog® platform which contains all the traits broadcasters and service providers need in order to be successful and thrive in today’s market - flexibility, scalability and efficiency.
More Information

Get more information on Next Generation Video Networks by visiting our Newtec Dialog page:
www.newtec.eu/product/newtec-dialog

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