



Building Market Leaders

building market leaders

NDS creates the security, enabling and interactive products and solutions that allow leading pay-TV platforms and telcos to generate revenues by delivering digital content to set-top boxes, DVRs, PCs, Portable Media Players (PMPs) and mobile devices.

Success in pay-TV depends on delivering a high quality, innovative service with compelling content based on seamless technology. That's why more than 70 leading pay-TV operators worldwide rely on proven NDS solutions for their security, set-top box software, VOD, EPG, DVR, interactive and convergence requirements.



NDS has an impressive list of industry credentials:

- VideoGuard was the first and remains the market-leading digital conditional access
- XTV™ was the first DVR technology and is still the market leader
- MediaHighway® is the world's most powerful set-top box software
- NDS Dynamic™ ad solutions set new standards for enhanced audience measurement, addressability and interactivity
- The NDS On-Demand TV solution includes hybrid-TV and Progressive Download
- NDS Unified Headend manages converged content delivery to multiple networks
- Pioneers in iTV applications, NDS now offers a complete interactive environment including EPGs, hybrid-TV, iTV ads and applications

No matter whether you are a large or small operator, no one can match the resources that NDS can offer to get you on-air faster with a more compelling offering, at a price that makes sense. And no one offers better support before, during and after integration.

If you're planning to be a leader in pay-TV, it pays to work with NDS – the company that has helped so many platforms succeed.



customers worldwide

THE AMERICAS

Cablevision
Canal Overseas
Cox
DIRECTV
DIRECTV LA
RaySat
Sky Brazil
Sky Mexico
Surewest

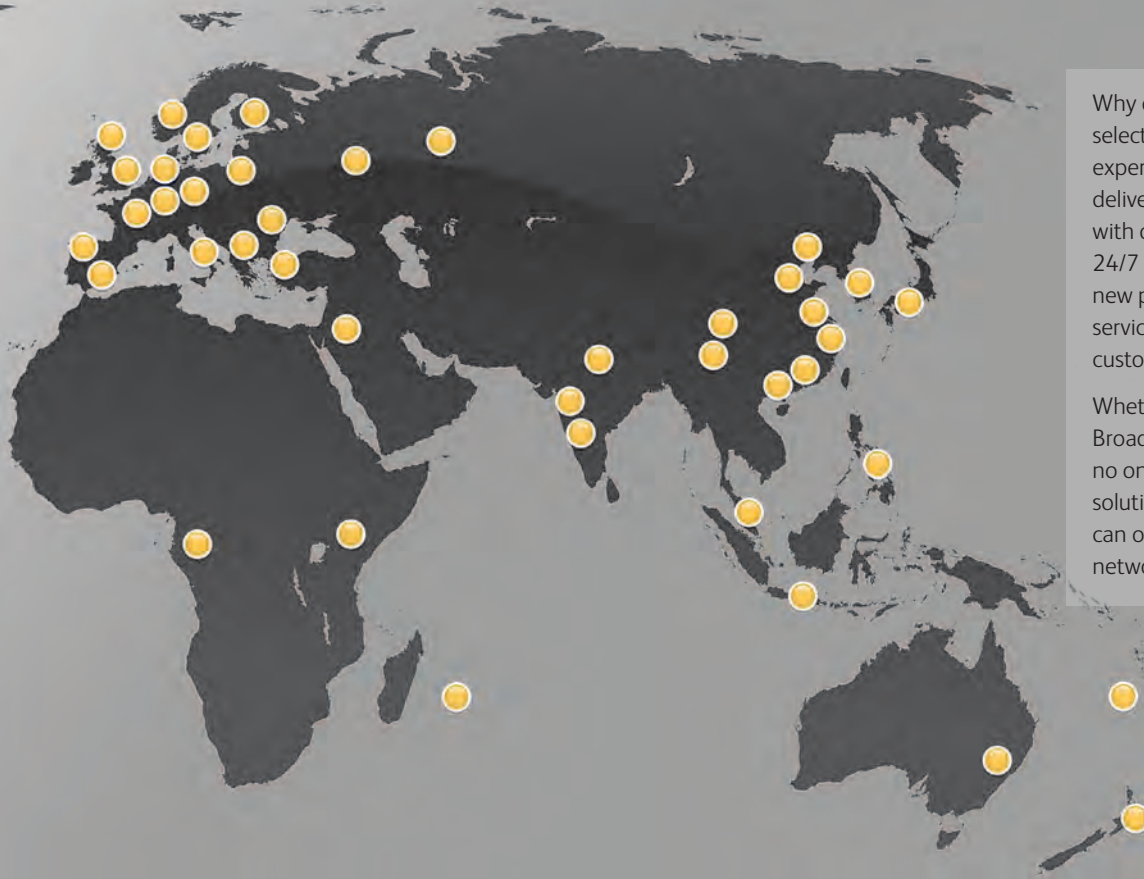
EUROPE | MIDDLE EAST | AFRICA

Akado Stolitsa
Arcor
Aster
BeTV
BSkyB
Canal Digital
Canal Digitaal
Canal Overseas
CanalSat
Cyfra+
CYTA
Dogan TV
Digital +
DTH Television
Get
Hot
Inteleca
Kabel BW
Kabel Deutschland
Lumiere TV
Ono
Partner Communications
Romtelecom
Serbia Broadband
Sistema
Sky Deutschland
Sky Italia
SmallWorld
TeleClub
Tele Columbus
Telekom Austria
Viasat
Vision TV
Yes

ASIA | OCEANIA

AGWL
Astro MBNS
Bharti Airtel
Canal Overseas
CCN-Wenzhou
CCTV
China Network Systems
Chongqing Cable TV
CJ HelloVision
DEN (Digital Entertainment Network)
DOXTV
Foxtel
GSGB (GS Gangnam)
Guangzhou Cable TV
Guizhou Cable TV
HCN
Hathway
KT (Korea Telecom)
Mediascape
Oriental Cable Network
PT MNC Skyvision (Indovision)
Shenzhen Topway
Sichuan Cable Network
SkyLife
Sky Television
Softbank-BBTV
STAR
Tata Sky
Tbroad
Tianjin Cable
TVB Pay Vision
Zhongshan Cable





Why do so many pay-TV operators and telcos select NDS? Perhaps it's our end-to-end expertise as well as our on-time, on-budget delivery. It could be our proven integration with other parts of the pay-TV eco-system, 24/7 reliability and massive investment in new products. It could also be the complete service offering which helps ensure that our customers lead the market.

Whether you operate a satellite, cable TV, Broadband IP, or hybrid satellite-IP platform, no one has the broad range of proven solutions and integration capability that NDS can offer. Wherever you are, the NDS global network provides superior service and support.

Technology, integration, innovation and dedication. That's how NDS keeps your business in front today – and in the future.

convergence



Today's viewers want to watch more content on more devices, whether it's live or On-Demand, at home or on the go, viewed on TVs, PCs, PMPs, and other mobile devices.



For operators, convergence means maximizing their content investment by delivering it over several networks. For subscribers, convergence simplifies the acquisition and use of content throughout the home and on the road. Whether it is sports, entertainment, movies or On-Demand, subscribers want to watch their content wherever and whenever they can, free from schedules and device constraints. As the market searches for compelling convergence solutions, many service providers are turning to NDS. They understand that convergence is complex and they want a technology partner that understands how to simplify the process.

NDS is already delivering proven solutions for convergence. We have invested in ongoing development of our MediaHighway set-top box software. VideoGuard CA/DRM remains the most robust solution in the industry. New solutions like the award-winning NDS Unified Headend allow operators to manage multiple content sources to multiple platforms. PC Show™ is the advanced solution that turns PCs into high-powered HD DVR set-top boxes.

We have also created unique solutions for On-Demand including hybrid broadcast/IP set-top boxes and multi-room DVR. It's all managed through multi-device User Interfaces, ensuring that consumers enjoy a better user experience whatever device they are using.



NDS end-to-end expertise

NDS products and solutions are grouped into three main categories: Secure, Enable and Interact. We take the right tools from each of these primary categories to create our end-to-end solutions.



Secure



Enable

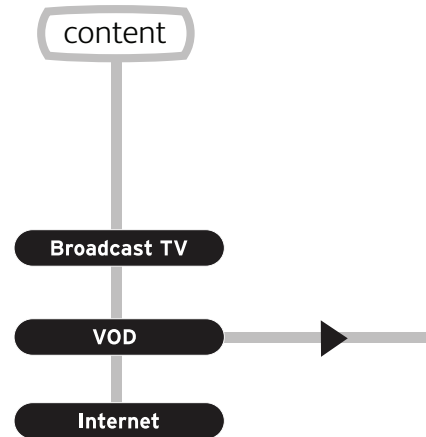


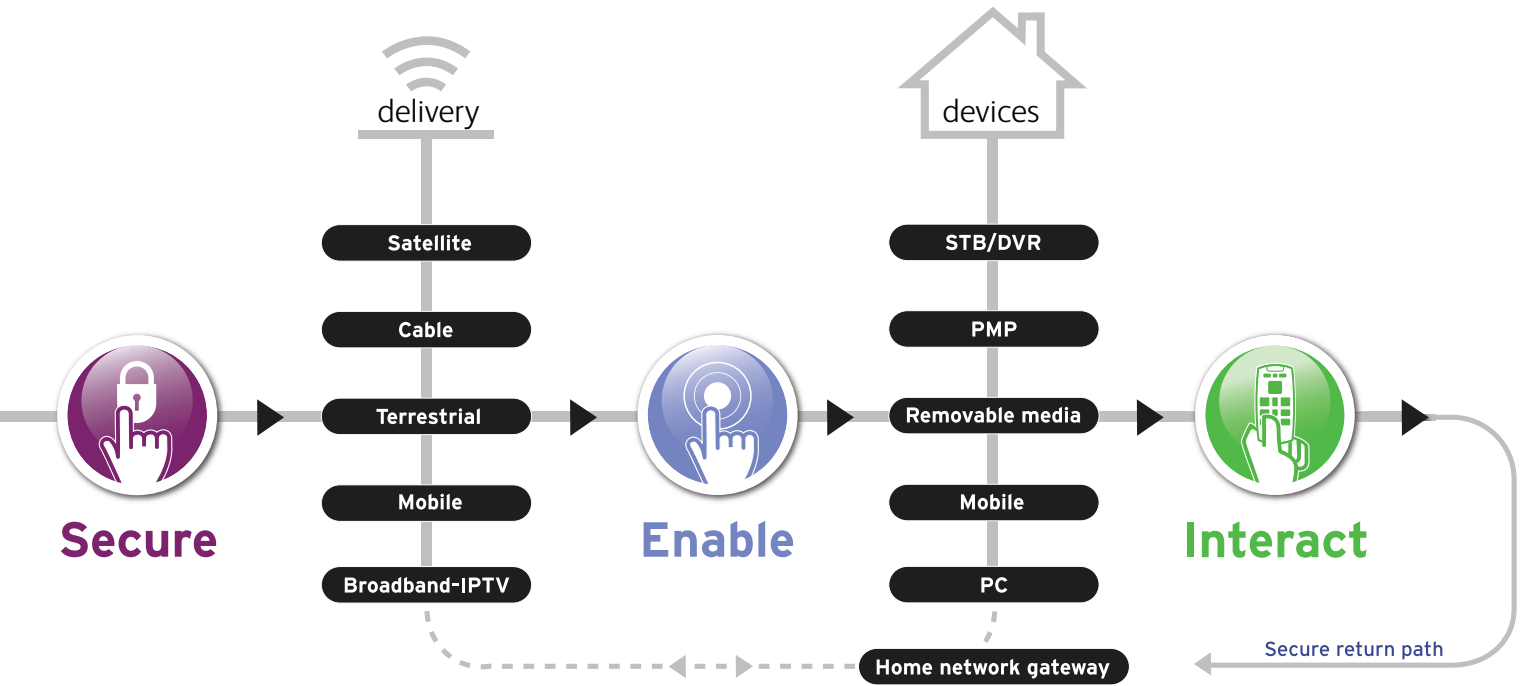
Interact

Secure: NDS protects both your branded *service* and *digital content* with VideoGuard CA/DRM. VideoGuard, recognized for its robust protection and effective operational security, is already integrated with TVs, STB/DVRs, PC, PMPs and mobile devices.

Enable: NDS delivers technologies that enable operators to generate revenues and reduce churn with live or On-Demand TV. Enabling solutions include MediaHighway set-top box software, DVRs, Unified Headend, broadcast/IP-hybrid solutions, On-Demand solutions, Dynamic advertising, and User Interfaces such as EPGs.

Interact: NDS offers a wealth of applications that let subscribers interact with TV content - through games and gambling, search, social networks, home shopping and recommendations.





NDS end-to-end systems changing the way people are entertained and informed



NDS' greatest strength is our ability to design, develop, integrate and deliver the most intricate end-to-end digital pay-TV systems for satellite, cable, terrestrial, mobile and broadband operators around the globe. These highly complex systems must deliver total reliability because operators depend on NDS technology to keep their platforms running 24/7.

satellite solutions

NDS has delivered the world's largest and most complex satellite solutions to major platform operators around the world. We also help these operators stay competitive with regular upgrades that reflect new technology such as the advent of On-Demand, hybrid solutions and Internet video on TV.

Major NDS satellite customers include DIRECTV, BSkyB, Viasat, Sky Italia, Canal Satellite, STAR, Foxtel, Tata Sky, Bharti, and DIRECTV Latin America.

cable TV

When it comes to complex cable solutions, NDS has already delivered systems for leading European cable MSOs including Kabel BW, Kabel Deutschland, Hot, Ono, as well as operators throughout China including Shenzhen Cable, Guangzhou Cable, Guizhou Cable, and Sichuan Cable.

In the US, NDS is helping MSOs including Cablevision and Cox Communications move ahead with tru2Way, the new digital standard. We are also delivering addressable, downloadable and removable security solutions to Cablevision.

Less expensive than other removable modules, the NDS solution offers robust security and a wealth of business enabling tools. NDS has also been selected by Cox to integrate and implement its new UI and EPG, which will be rolled out in 2010.



PC Show, delivering the best of TV to PCs



The abundance of online video available, and the massive number of PCs and laptops, makes these devices essential for downloading and watching TV. For operators and telcos looking to deliver the best of TV directly to PCs, NDS PC Show creates new business opportunities.

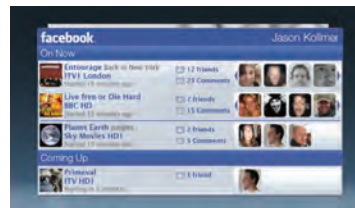
With PC Show, subscribers can turn their PCs into entertainment centers. They can enjoy SD and HD live channels as well as On-Demand programming. PC Show uses VideoGuard DRM technology to enable secure content transfer to other devices while maintaining license agreements.



hybrid solutions

For satellite and cable TV operators, NDS hybrid solutions bring complete access with On-Demand functionality and personalized services to TV. Subscribers can find and watch their favorite shows or similar programs using advanced search, recommendation and personalization. They can even tell their friends what they're watching using social networks like MySpace, Facebook and Twitter.

The NDS IPTV end-to-end system enables telcos to deliver broadcast and On-Demand content securely to hybrid set-top boxes and to PCs. Using VideoGuard, NDS has successfully delivered IPTV and PC TV solutions to some of the world's largest telcos as part of their overall multi-service consumer bundles.



VideoGuard Express all-in-one package

NDS has also developed the VideoGuard Express™ solution for new digital broadcasters. This all-in-one package offers VideoGuard conditional access, MediaHighway set-top box software and EPGs with a choice of pre-integrated set-top boxes.

Operators can get on-air faster and more economically with this all-in-one package, designed for up to 500,000 subscribers. They can upgrade their system with advanced features including DVR, VOD, interactive applications or HD, extending their initial VideoGuard Express™ investment.



professional services

NDS has used its experience and resources to integrate many of the world's most complex single and multi-platform networks for leading operators.

Our vast knowledge base encompasses a variety of skills including security, STB and headend development, systems integration and managing large scale programs. This makes NDS the ideal company to consult on major TV and convergence-related projects. Our proven team of TV technology experts takes a close look at your operation, evaluates your business goals and provides solutions that will help your operation grow.

NDS has successfully provided professional services to Cox Communications in the US, Orange in Israel, Belgacom in Belgium and Tata Sky in India.



revenue



churn

secure



VideoGuard®

NDS VideoGuard® CA/DRM continues to set the standard for content protection. Successfully deployed in more than 107 million active devices worldwide, VideoGuard safeguards an operator's service, its branded look and feel, and the actual digital content.

VideoGuard has been the choice of the world's leading operators because of its robust piracy-free security, effective NDS operational security and wealth of flexible business scenarios.

VideoGuard has already been integrated into hundreds of set-top box and DVR models as well as PCs, PMPs, removable storage, home networks, mobile phones and other devices. As a result operators can securely deliver content anywhere, anytime, to any device.

This proven solution has many varieties – with or without smart cards, in removable hardware solutions such as a USB Key or as part of a downloadable hardware-assisted system.

VideoGuard drives new business models that include subscription, On-Demand, à la carte content packages, parental control, regional blackouts, tiering, bouquets, PPV, pre-paid, and token PPV.





future proof

enable



MediaHighway®

TV operators want to offer their customers more. More choice, more flexibility and more excitement. They also want to save money by separating software from hardware – lowering the cost of development with “write once, run on all” scenarios, while lowering the initial cost of set-top boxes. That’s why operators need MediaHighway – powerful set-top box software.

NDS has invested over a decade in developing and enhancing MediaHighway set-top box software. Now deployed in more than 105 million devices, MediaHighway® has undergone a major upgrade, enabling it to deliver the potential of TV with a user experience that is more compelling than ever before. It drives a new generation of advanced EPGs and interactive applications designed so that customers can make the most of their TV experience.

MediaHighway is a standards-based open platform, enabling third-party developers to create exciting new applications using the MediaHighway Development Kit. It is also future proof thanks to a well defined roadmap that will enable operators to benefit from a wealth of new releases, at specific times, and at significant savings.



On-Demand

On-Demand content such as movies, entertainment, sports and catch-up programming, as well as user-generated and Internet video all continue to increase in popularity. As a result, TV platform operators want to offer their viewers the best of all content worlds: live and On-Demand content delivered over Broadband and available through a single, branded operator service.

The NDS On-Demand solution supports real time streaming VOD. New hybrid broadcast /IP set-top boxes and improvements in the Internet's infrastructure enable operators to use this growing pipeline. They can now deliver On-Demand content cost-effectively using Progressive Download – without needing expensive video servers or guaranteed bandwidth per session. With VideoGuard CA/DRM and MediaHighway set-top-box software, operators can use Progressive Download to deliver encrypted content to non-DVR boxes equipped with USB flash keys or external hard disks.

Sideloaded content allows users to download content from DVRs and set-top boxes to PCs, portable devices, like mobile handsets and PMPs.

DVRs have changed the way people watch TV, and NDS leads the global market with its XTV DVR technology used on more than 15 platforms. Viewers depend on their DVRs to time shift, allowing them to watch what they want, when they want. NDS technology puts DVRs at the heart of the home experience, securely connecting various devices and simplifying content transfer and consumption. They can also share content with PCs, or securely archive it on external disks.

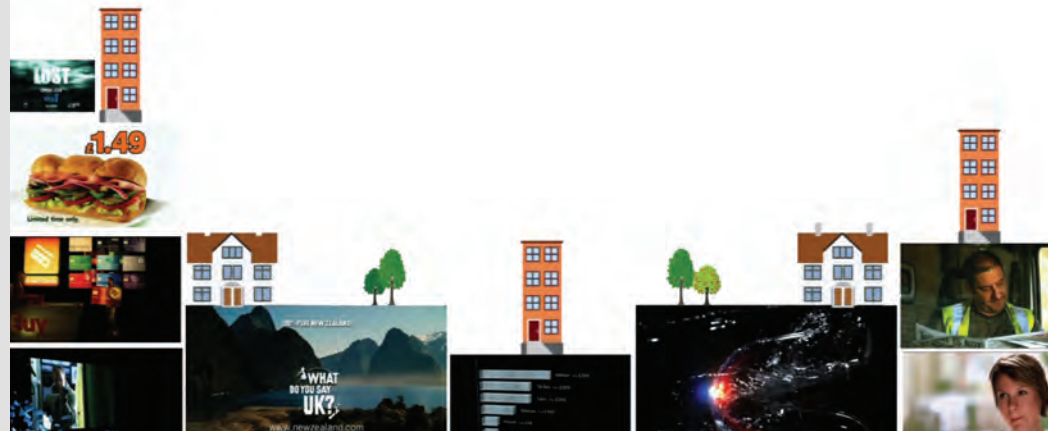
NDS has recently developed DVR Lite which transforms zapper boxes into basic DVRs. By connecting external USB memory devices for storage to these legacy STBs, operators can offer a low cost version of the DVR – a must-have in today's competitive market.

NDS Dynamic advertising solutions

NDS Dynamic advertising solutions offer a suite of next generation tools that introduce measurement, addressability and interactivity to TV advertising.

Operators benefit from a larger slice of ad revenues by providing better audience measurement information, more precise targeting, and most importantly, more ad opportunities using the DVR's hard drive. NDS Dynamic starts by providing more granular measurements based on live and off-disk viewing.

The system offers an exciting range of ad opportunities including short, telescopic, and addressable ads. NDS also offers ads that appear on live pause. It results in a new generation of TV ads that are more relevant, more effective, and watched by more of the right target audience.



NDS Unified Headend

The NDS Unified Headend™ is the first step on the road to convergence. It allows operators to deliver TV services beyond the set-top box to PCs, mobile phones, PMPs, and other consumer devices, through one central control.

This integrated solution enables service providers to offer broadcast and On-Demand video services to multiple devices over multiple networks controlling both the CA/DRM and content metadata.

NDS Unified Headend lets you offer better service because each Customer Service Representative has a complete overview of every client. Your TV business can easily introduce and deliver new services using different delivery networks that reduce churn and generate more revenues.

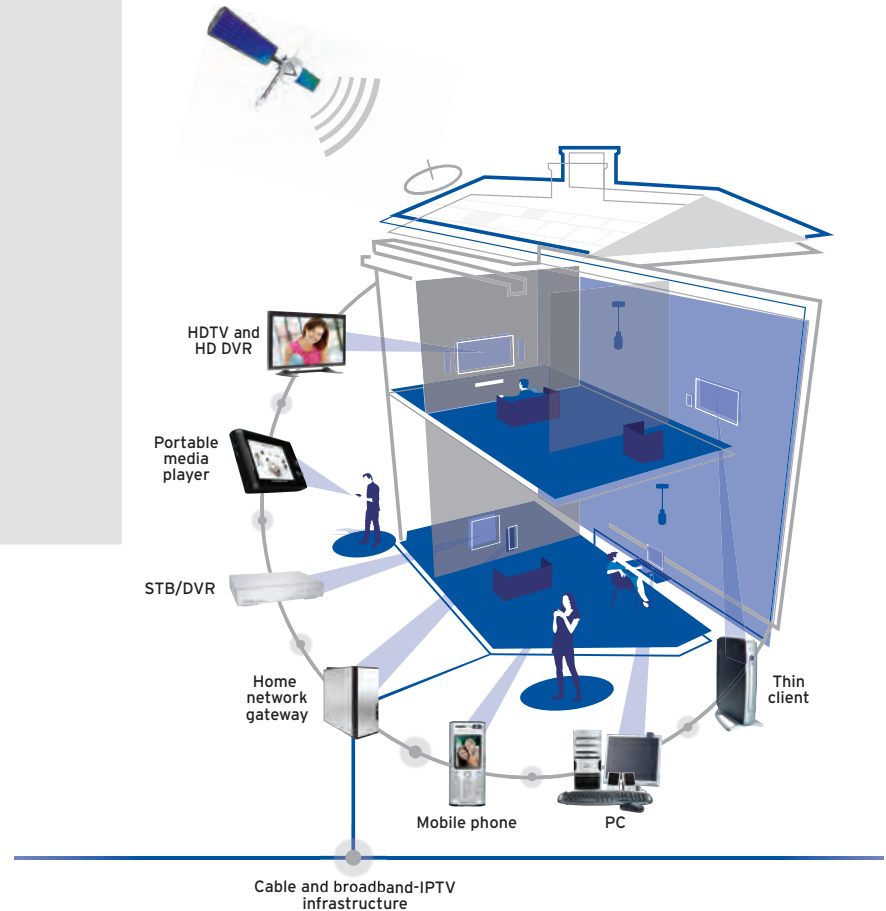


home networking

NDS has created innovative solutions that help you get the most from content throughout your home. Both NDS VideoGuard CA/DRM and MediaHighway set-top box software offer solutions that simplify secure content management, consumption and transfer.

Subscribers can watch and transfer content between devices using multi-room DVR, all managed through a single EPG.

Jungo®, an NDS subsidiary, has created solutions for use in residential gateways. These powerful hubs control content distribution from the residential gateway to devices throughout the home.



EPGs

The EPG is the operator's primary branded interface to the customer. It is also the customer's main portal to the world of entertainment and activity.

Today's EPG is much more than just a program guide. It has evolved to the point where it offers information about broadcast, On-Demand, Internet and interactive entertainment services. It can include PPV, online shopping, purchase VOD content and advanced Internet access to widgets offering home shopping, recommendation, search and social networking options.

EPG Designer

For operators who want the flexibility to be able to make certain changes to their EPG on their own, NDS has created EPG Designer.

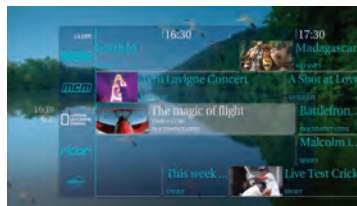
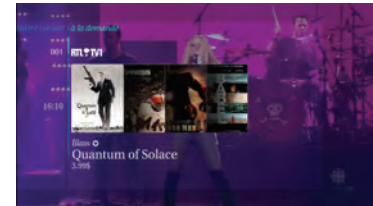
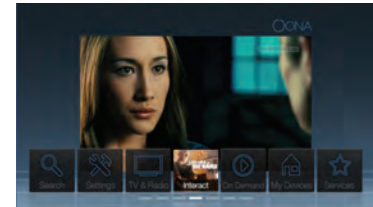
This PC-based application allows trained operators to make graphic changes such as adding elements, changing backgrounds, adding seasonal and holiday decorations or graphics for special promotions for major sporting or news events.



UI/EPG design consulting and integration

User Interface design has come a long way and these applications are now an integral part of the viewing experience. NDS has designed hundreds of EPGs in SD and HD for operators around the world. Today our User Interfaces are used on TV/DVRs, PCs and mobile phones. They are integrated with NDS systems or can be added to non-NDS set-top box platforms.

At our design studios located around the world, NDS creates a wide variety of unique or off-the-shelf EPGs for customers in dozens of languages and styles to meet local market needs. Our experienced, localized teams can also provide consulting services that range from initial design and testing to delivering a complete package.





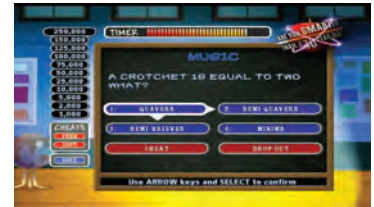
interact

interact

NDS pioneered interactive TV (iTV) and now continues to lead the way with complete interactive environments that include the UI and EPG, games and home shopping. In addition, these new environments offer connection to the Internet and widgets. NDS Locate TV helps you find when your favorite TV show will be on-air, and search engines and social networking services such as MySpace, Twitter and Facebook can be accessed using your TV remote control.

NDS develops and designs game bundles for leading operators such as Cox, Cartoon Network and DIRECTV. These are often tied in with leading brands and TV shows such as SpongeBob SquarePants®. We also create tailored TV games for advertising and special promotional activities.

Through Orbis®, another NDS subsidiary, we deliver a rich variety of gaming applications including online casino, games of chance and unique skill-based games.





vision

the future

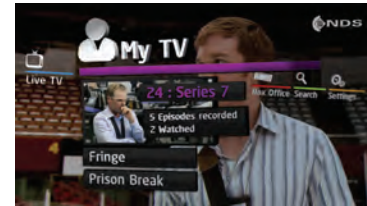
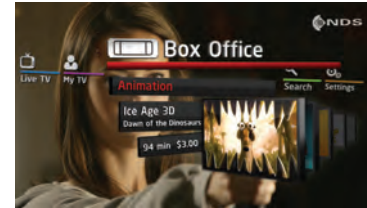
NDS spends a significant proportion of its revenues on R&D. Thanks to this investment, we expect to keep our customers ahead of the curve. It's another way NDS helps you maintain market leadership.

The world of traditional broadcast television is being challenged by availability of content delivered over Broadband Internet infrastructure, often termed over-the-top delivery, because it bypasses the traditional "gatekeepers". This mode of delivery gives the consumer many benefits, including a much wider choice of content, available on far more devices than just TV, and the ability to enjoy this content anytime and anywhere.

NDS is actively engaged in devising solutions that merge traditional and over-the-top into a unified customer experience.

NDS R&D New Initiatives (NI) is focused on extending NDS' reach into new business areas by generating new relationships and widening our customer engagement. NI has generated significant interest in its advanced technology prototypes including advanced advertising, home networking and cross-platform solutions. NI's new InfiniteTV is an open platform for distributing content primarily funded by advertising.

The NDS Strategy & Technology Business Development (STBD) team looks at new market trends and technologies in order to answer the needs of existing and potential clients. The team works with leading technology providers, major studios and new companies. Their goal is to validate emerging technologies, acquire companies and use these innovations to create new revenue sources for NDS and its customers.



They are working on innovative ways to monetize content, developing new 3D applications including EPGs, closed captioning and controls. In addition, STBD is extending our industry-recognized security expertise with advanced content watermarking, games protection and external DVR storage

subsidiaries



Orbis supplies its OpenBet™ software to qualified customers worldwide, while observing laws concerning online gaming in different countries.

OpenBet™ has modules for sportsbook, casino, retail, fixed odds and poker, and gives operators greater control as all games transactions go through a single customer account. Its major customers read like a Who's Who of the legalized online gaming world, including Ladbrokes, William Hill, Betfair and BSKyB.



Jungo Ltd. develops and supplies OpenRG™ and OpenSMB™ set-top box software for residential gateways as well as tru2way and DOCSIS solutions for cable MSOs and USB solutions.

OpenRG saves operators money by separating hardware from software; reducing the initial cost of hardware and lowering the cost of introducing software. Jungo's SCR (support cost reduction) significantly cuts customer service costs. Jungo's second unit creates USB stack solutions for all types of businesses.



CastUp brings important "video over IP" (VoIP) expertise and technology to NDS and delivers streaming video to PCs around the world.

NDS Headquarters

One London Road
Staines
Middlesex
TW18 4EX
United Kingdom

Tel: +44 (0)20 8476 8000
Fax: +44 (0)20 8476 8100

NDS Americas

3500 Hyland Avenue
Costa Mesa
CA 92626
USA

Tel: +1 714 434 2100
Fax: +1 714 434 2474

NDS Australia

Level 31 Northpoint
100 Miller Street
North Sydney
NSW 2060
Australia

Tel: +612 9025 3000
Fax: +612 9025 3099

NDS Asia Pacific

Suite 5301, 53rd Floor
Central Plaza
18 Harbour Road
Wanchai
Hong Kong

Tel: +852 2201 9151
Fax: +852 2201 9141

NDS China

25th Floor, Tower A
Oriental Media Center
4 Guanghua Road
Chaoyang District
Beijing 100026, PRC

Tel: +8610 8527 9588
Fax: +8610 8529 8460

NDS Denmark

Vesterbrogade 149
Building 9
1st Floor
1620 Copenhagen V
Denmark

Tel: +91 80 2563 5800
Fax: +91 80 2563 5813

NDS France

3 Esplanade du Foncet
65 rue Camille Desmoulins
92442 Issy les Moulineaux
France

Tel: +33 1 5500 5700
Fax: +33 1 5500 5701

NDS India

9 'Ashford Park View'
80 Feet Road
Koramangala III Block
Bangalore 560 034
India

Tel: +91 80 2563 5800
Fax: +91 80 2563 5813

NDS Israel

5 Shlomo Halevi Street
Har Hotzvim
Jerusalem 97770
Israel

Tel: +972 2 589 4444
Fax: +972 2 589 4400

NDS Korea

1005 CCMM Building
12 Yoido-dong
Yeongdeungpo-gu
Seoul, 150-968
Korea

Tel: +82 2 6294 9151
Fax: +82 2 6294 91580

NDS Russia

Smolensky Passage,
Smolenskaya Square 3
Regus Business Center Office 745
Moscow 121099
Russia

Tel: +7 (495) 643 98 97
Fax: +7 (495) 225 85 00

NDS Spain

C/Pinar, 5
28006 Madrid
Spain

Tel: +34 (0) 91 745 6828
Fax: +34 (0) 91 745 6699



www.nds.com