



Welcome to Telewest

November 2005



Profile

Telewest, the UK broadband communications and media group, currently passes and markets to 4.7 million homes and provides multichannel television, telephone and internet services to 1.8 million residential customers and 3.95 million revenue generating units. Telewest Business, the company's business division, supplies broadband communications to the public and private sector markets. Telewest's content division, Flextech has 5 wholly owned pay television channels and one free-to-air channel and is also the BBC's partner in UKTV. Together they are the largest supplier of basic channels to the UK pay television market with a portfolio that combines wholly owned and managed channels, including the ten UKTV channels.

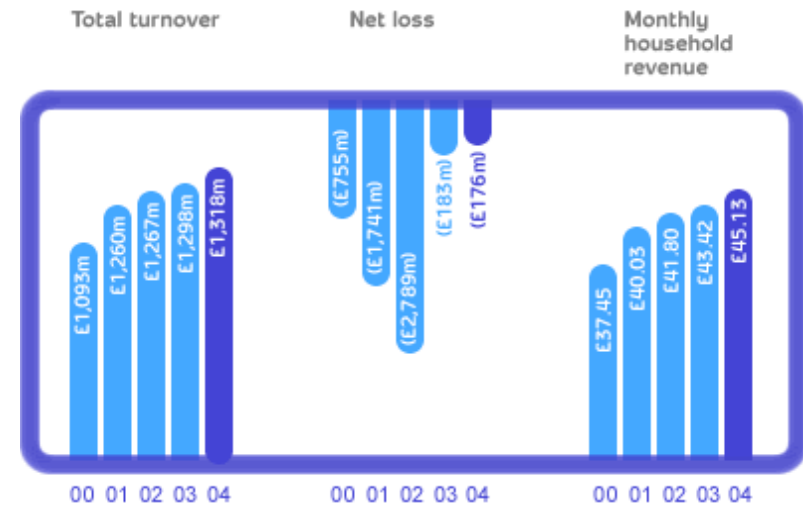
Our business

- 39% customer penetration, targeting 45% by end 2009
- Market leadership in broadband internet in our franchise areas
- Strong focus on quality customers with 35% triple play penetration. Targeting 40% during 2007
- Household revenue per customer of £45.17 per month
- Valuable content division outperforming the market
- Cash generative Business division which is leveraging the Consumer network

Principal shareholders (as at 31/08/05)

Shareholder	% of Telewest Global, Inc. Issued Share Capital
W.R Huff Asset Management Co. L.L.C	15.4%
Fidelity Management & Research Co	8.01%
Franklin Mutual Advisors, L.L.C	7.8%

Revenue and net loss



Management

Board of Directors

Name	Age	Position with Telewest
Anthony (Cob) Stenham	73	Class III director and chairman of the board
Barry R. Elson	64	Class I director and acting chief executive officer
William Connors	35	Class III director
John H. Duerden	64	Class III director
Marnie S. Gordon	40	Class II director
Michael Grabiner	55	Class II director
Michael McGuinness	41	Class I director
Steven R. Skinner	63	Class II director

Executive Officers

Name	Age	Position with Telewest
Anthony (Cob) Stenham	73	Director and chairman of the board
Barry R. Elson	64	Director and acting chief executive officer
Eric J. Tveter	46	President and chief operating officer
Stephen Cook	45	Vice president, group strategy director and general counsel
Neil Smith	40	Vice president and chief financial officer

Divisional Management

Name	Age	Position with Telewest
Lisa Opie	45	Managing director, content division
Howard Watson	42	Managing director, networks, technology & IT
Stephen Beynon	40	Managing director of business



Company history

- 1984 The Telewest story begins in Croydon operating under the name of Croydon Cable.
- 1988 In 1988 Croydon Cable is bought out by United Cable of Denver, US. Franchises in Edinburgh, Avon and South East added.
- 1989 United Cable merges with United Artists Cable International.
- 1991 United Artists merges with their largest shareholder TCI (now Liberty Media), the largest cable operator in the US. A joint venture between TCI and US West is announced.
- 1992 Joint venture company is renamed Telewest Communications.
- 1994 Telewest successfully completes a stock market flotation.
- 1995 Telewest merges with SBC Communications, adding franchises in the Midlands and North West totalling 1.3 million homes.
- 1998 Telewest Communications announces a merger with General Cable, and acquires an outstanding interest in Birmingham Cable, adding a further 1.7 million franchise homes in Yorkshire, West London and Birmingham.
- 1999 Telewest purchases the remaining 50% stake that it does not own in Cable London from NTL, adding 0.4 million franchise homes in North London.
- 2000 In April, Telewest merges with Flextech. In November, Telewest extends its cable network with the acquisition of Eurobell taking the total number of homes passed to 4.9 million.
- 2002 Telewest Communications plc enters financial restructuring discussions with its stakeholders
- 2004 In July, Telewest emerges from its financial restructuring as Telewest Global Inc. Shares begin trading on Nasdaq National Market.
- 2005 In October 2005 ntl and Telewest announced a definitive merger agreement, under which ntl will acquire Telewest, creating the UK's second largest communications company and leading triple play service provider with a cable footprint covering more that 50 per cent of UK households.



Product developments

22 August 2005	Telewest continues to break speed limits by announcing speeds of up to 10Mb
11 August 2005	Telewest launches one of the most comprehensive online security services offered by a British ISP
19 January 2005	Scientific-Atlanta selected by Telewest Broadband to supply new personal video recorder
18 January 2005	Telewest Broadband launches first wave of TV-on-Demand services
16 November 2004	Telewest Broadband announces plans to upgrade the last remaining analogue part of its network in the North West
11 November 2004	Telewest Broadband announces a second speed increase for its broadband internet customers launching the UK's first 4Mb home cable internet service
2 November 2004	Telewest Broadband launches Talk Weekends allowing consumers to make unlimited UK local and national calls all weekend
4 October 2004	Telewest Broadband launches Talk Mobile allowing consumers to save up to a third on calls to mobiles
25 August 2004	Telewest Business helps ScotRail get on the right track as CCTV comes to its stations
18 August 2004	Telewest Broadband links with Netgear to launch wireless home networking
26 July 2004	Yorkshire Water switches to Telewest Business and saves over £100K a year
22 July 2004	Telewest Business secures remote connections with Juniper Networks Netscreen Security Portfolio
19 July 2004	Telewest Business chosen to provide IPVPN to the Elliott Group
6 July 2004	Telewest Business aids Sutton Harbour Holdings in Plymouth development
14 June 2004	EdNET and Telewest Business sign contract to build £1.2m Datacentre
2 April 2004	Telewest Broadband launches a 256k entry-level broadband internet service



Our successes

2005

Blueyonder wins Best Sumo Consumer Broadband Service at the Internet Service Providers' Association Awards

2004

Telewest Broadband is named Best in Sector (IT, Telecoms and Utilities) at the Call Centre Association Awards

Good Housekeeping places us at the top of their survey for 'fast and friendly' service

Telewest Business wins Customer Satisfaction Award from CMA

Winner of Best Unmetered Dial-up Service at the Internet Service Provider Awards





Winner of Best Consumer Broadband ISP at the Internet Service Provider Awards

Products and services

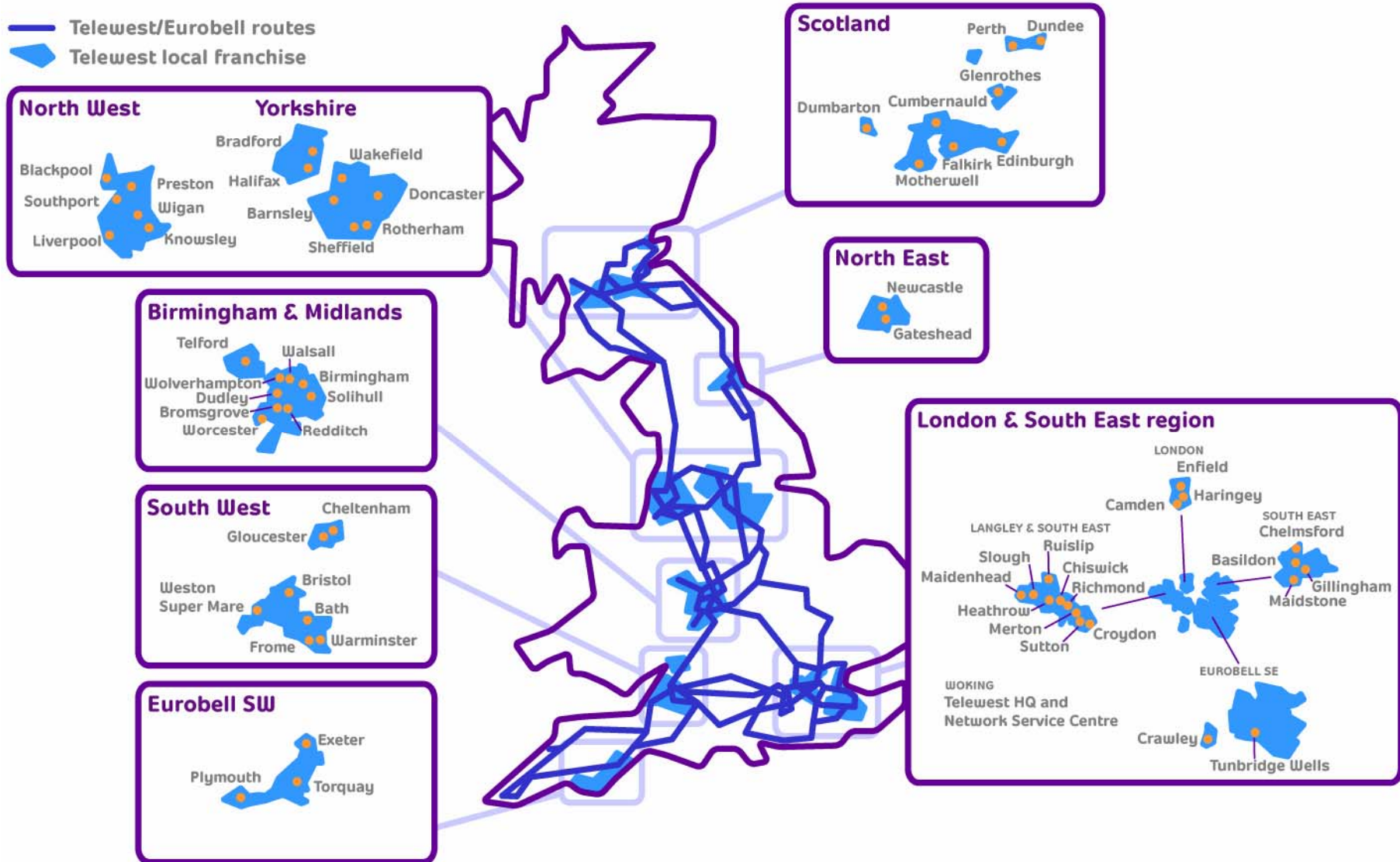
Consumer

Business

Content

		
<p>Digital TV: All the best digital TV channels including Sky Sports and Sky Movies</p> <ul style="list-style-type: none"> - Starter - Essential - Supreme - Premium channels - Pay per view - Teleport - Video on Demand <p>blueyonder internet: Award-winning blueyonder broadband and dial-up internet services.</p> <ul style="list-style-type: none"> - blueyonder surfunlimited - blueyonder broadband 2Mb - blueyonder broadband 4Mb - blueyonder broadband 10Mb <p>Telephone: Unlimited phone packages for a fixed monthly cost.</p> <ul style="list-style-type: none"> - Talk Unlimited - Talk Evenings & Weekends - Talk Weekends - Talk International - Talk Mobile 	<p>letsallmeet.co.uk Meet up when you can't get together</p> <p>Corporate Sector Public Sector, Medium and Small Businesses, Carrier Services</p> <p>Data solutions: ADSL, CCTV, Enterprise Connect, IPVPN, LAN-Extension, Private Circuits, Evolved Ethernet</p> <p>Internet solutions: ADSL, Cable Modem, Internet Leased Lines, Managed Internet Services</p> <p>Voice solutions: Conferencing, Connectivity, Directory Enquiries, Inbound Call Management, Managed Voice Solutions</p>	 <p> Trouble & Trouble Reload Bravo & Bravo+1 Ftn LIVINGtv & LIVINGtv+1 LIVINGtv 2 Challenge UKTV Gold, UKTV Gold+1 UKTV Style & UKTV Style+1 UKTV Style Gardens UKTV Drama </p> <p> UKTV History & UKTV History+1 UKTV Food & UKTV Food+1 UKTV Bright Ideas ids UKTV People UKTV G2 UKTV Documentary & UKTV Documentary+1 </p>

Network map





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