




Prospects for Satellite TV

Ferdinand Kayser, President and CEO

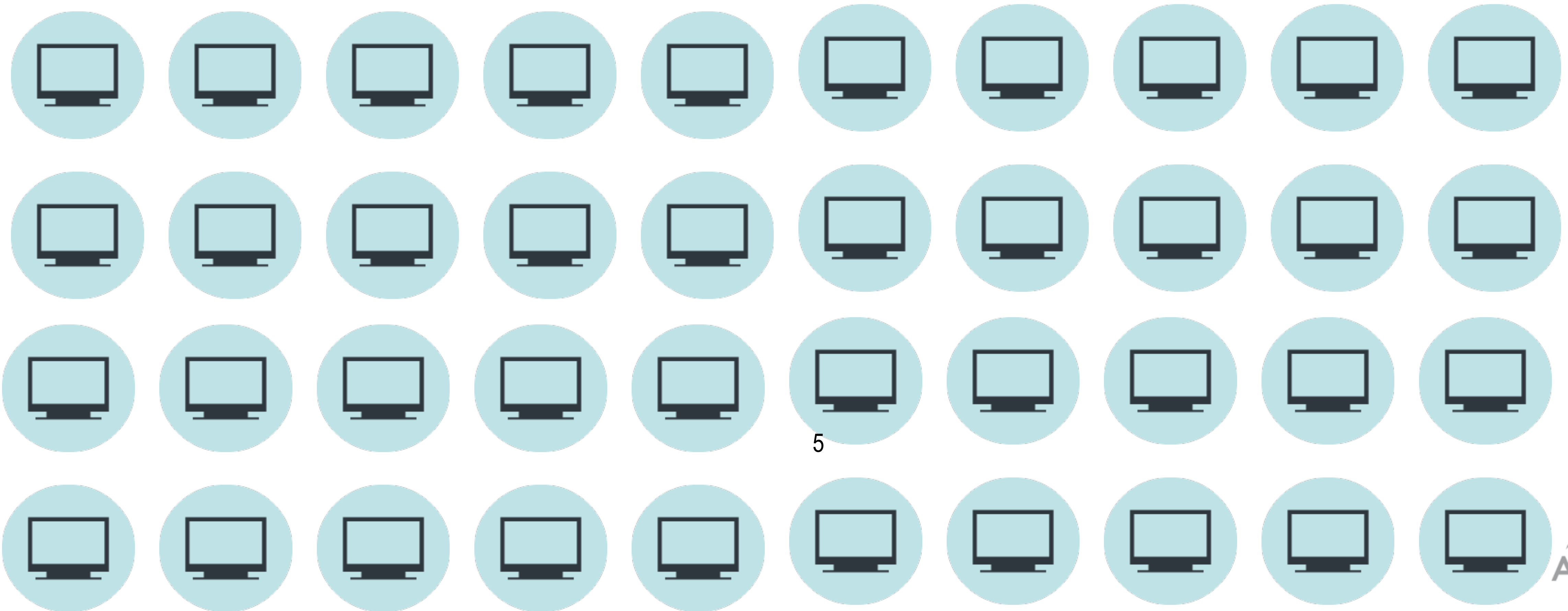


High Definition IPTV Hybrid TV



High Definition
is showing
strong dynamics

More than 185 million HD ready TV sets sold

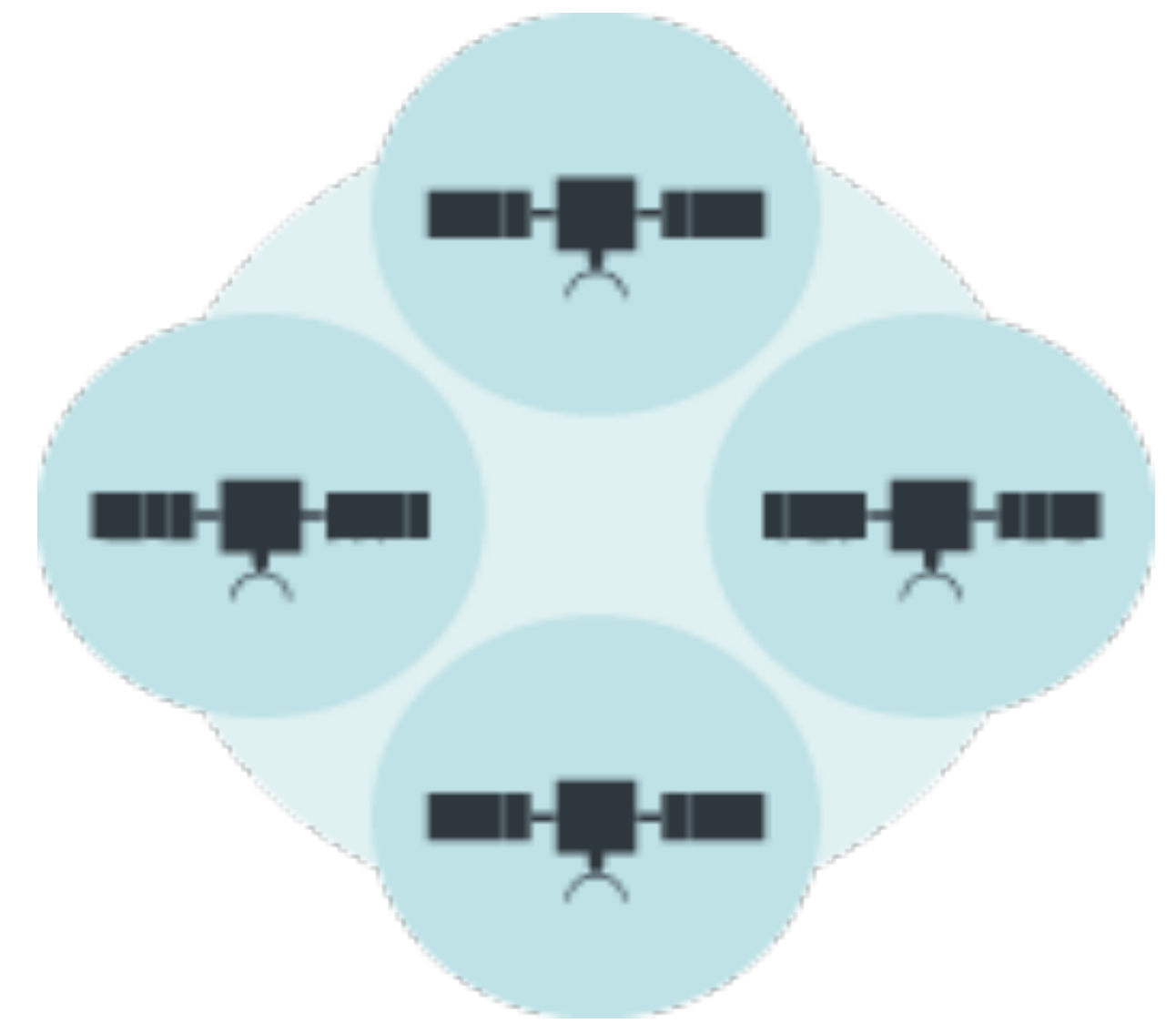


5

ASTRA serves 16 out 20 million satellite HD homes



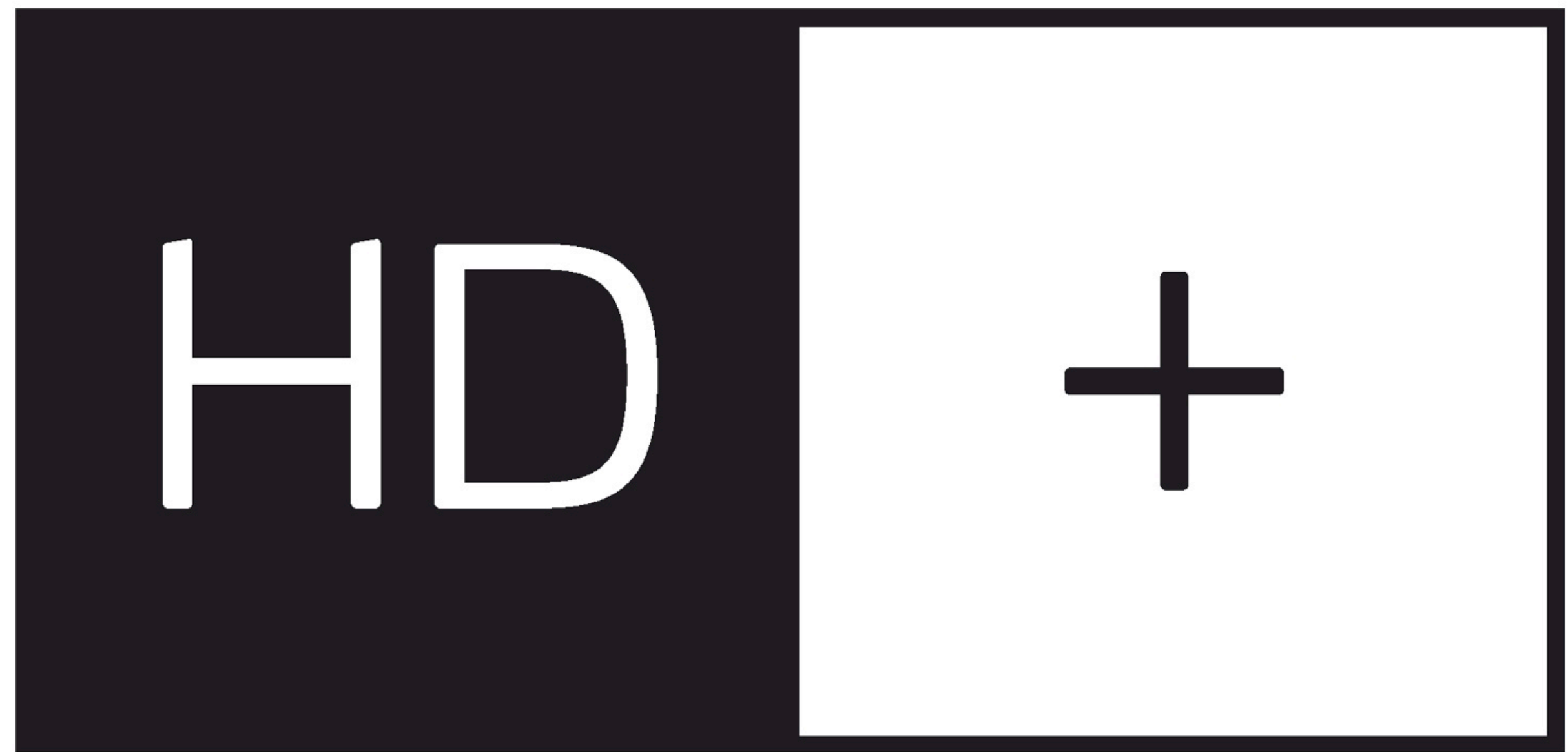
ASTRA is the most important HD platform in Europe



200 HD channels on ASTRA



HD+ develops favourably



by **ASTRA**

1.5 million HD+ smart cards

400.000 set top boxes sold

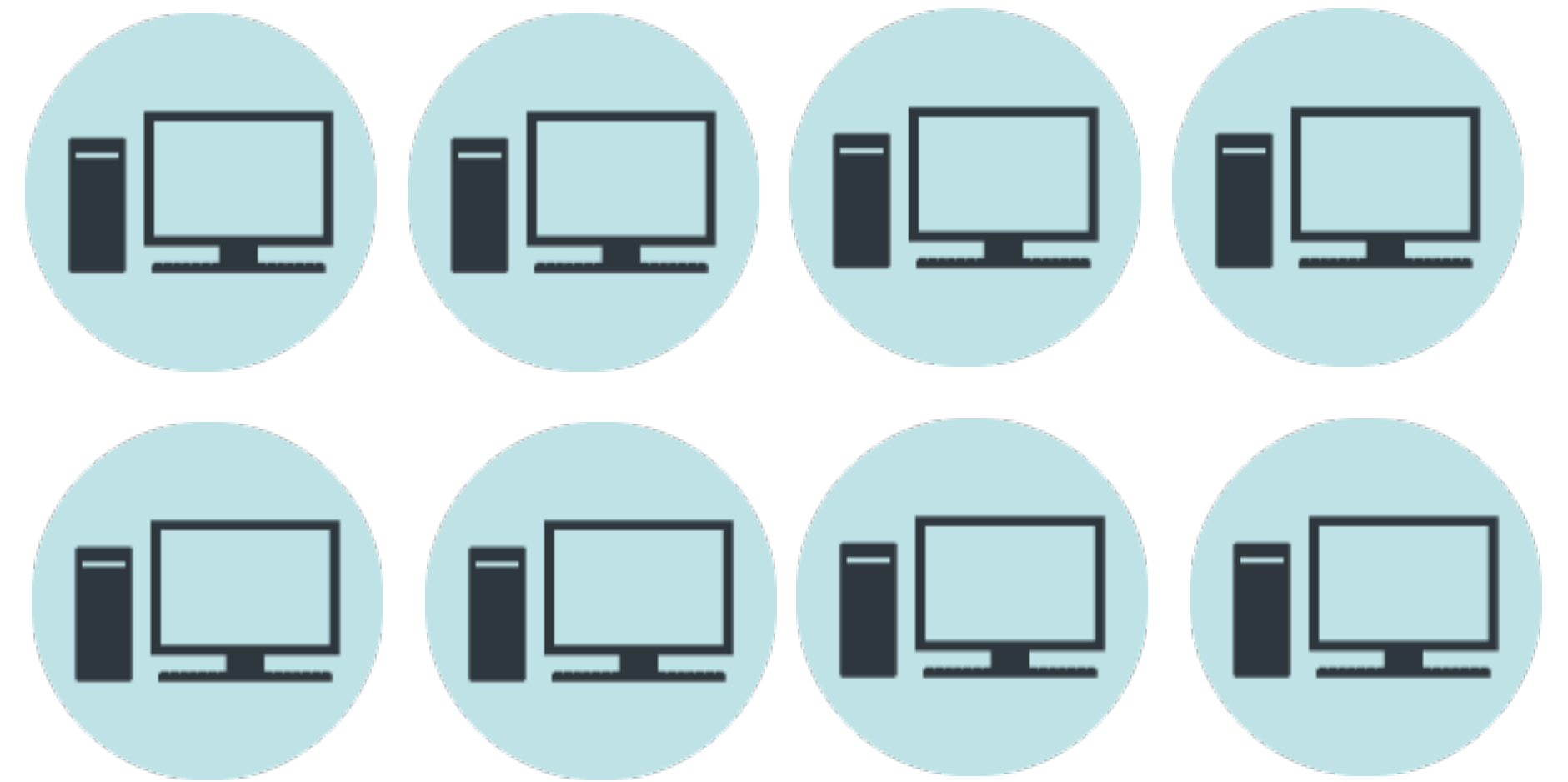
100.000 CI modules



Astra plays a
key role in IPTV

ASTRA serves 10 out of 12
million IPTV homes

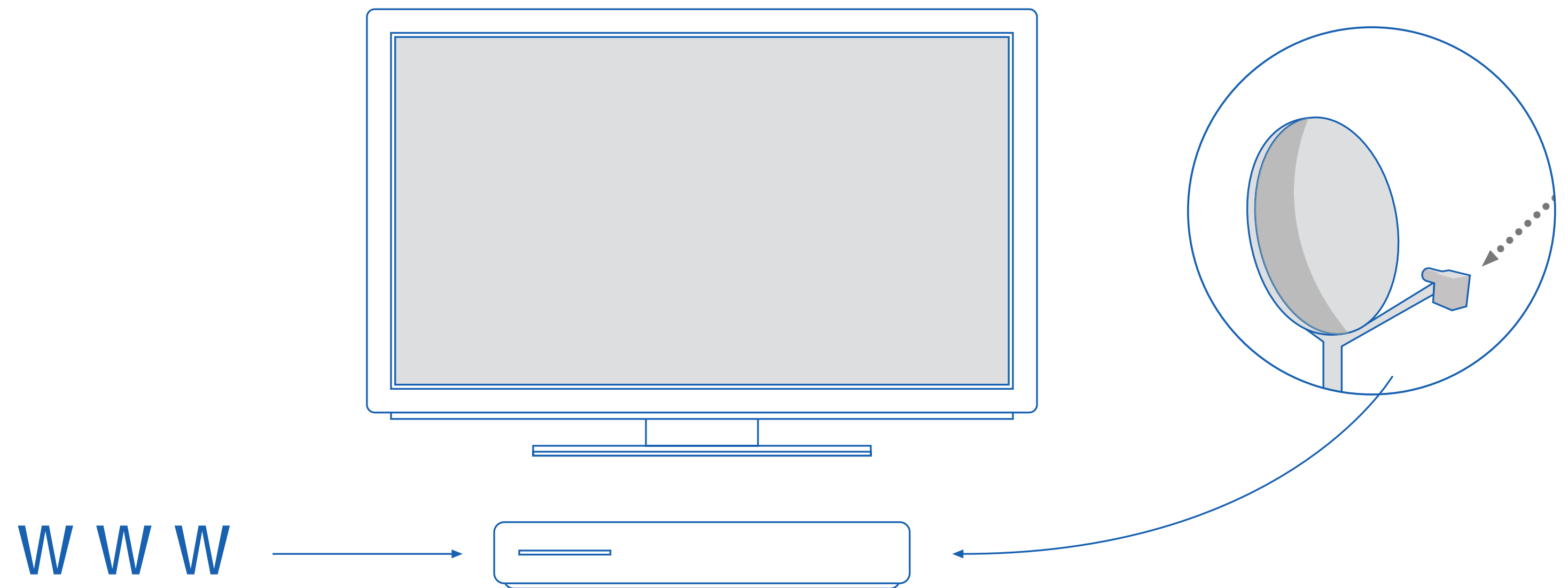
= 82 percent

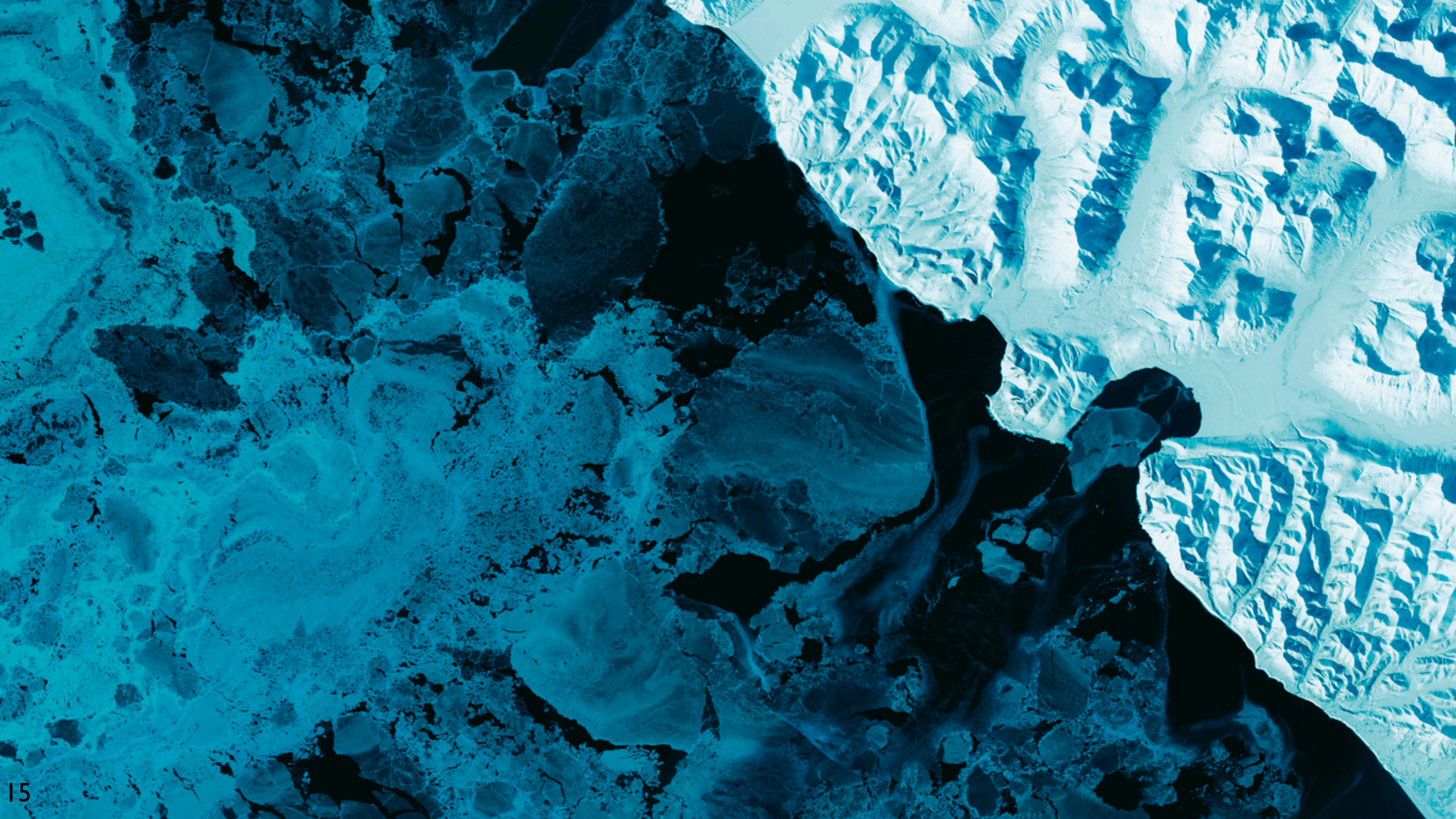


The background of the slide features a photograph of a building's exterior. On the left, a large, illuminated red 'T' logo is visible. To its right, a series of four red square signs are mounted on tall, thin poles, arranged in a diagonal line that recedes into the distance. The sky is a clear, pale blue.

Partnering with Telcos

Hybrid: the best of two worlds

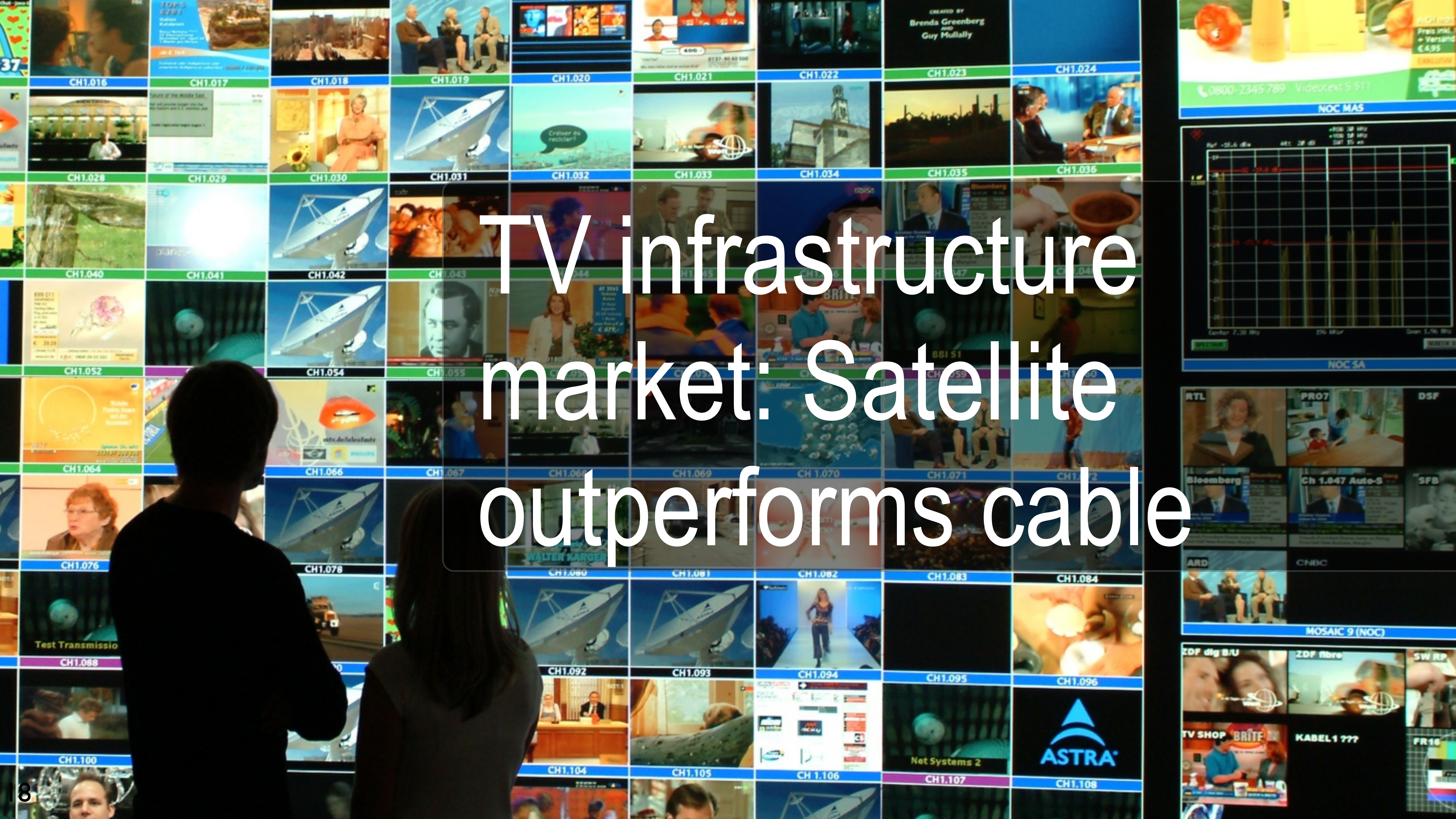




ASTRA Satellites: Increased reach over all platforms

Norbert Hölzle, Chief Commercial Officer

TV infrastructure market: Satellite outperforms cable



246 million TV households
in Europe



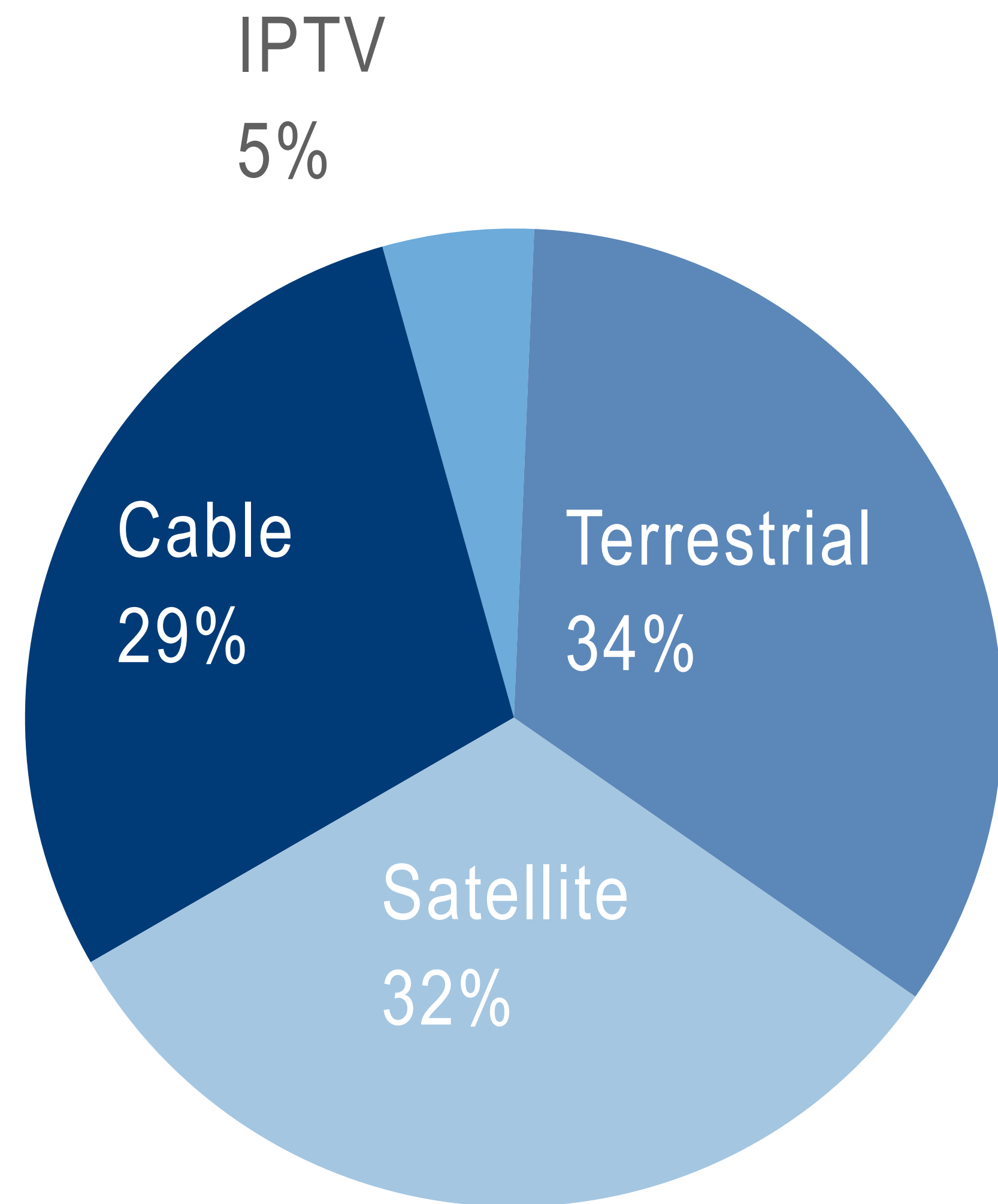
83.7 Terrestrial

79.1 Satellite

71 Cable

12.1 IPTV

Figures in million. Source: SES ASTRA, Satellite Monitor



ASTRA reaches more
than half of all TV
households in Europe





135 million ASTRA
TV households in Europe
= 55% of all TV households

This is in million:

58 DTH

68 Cable

10 IPTV



Satellite is leading the
digital TV
infrastructure market



168 million digital homes
+ 22 million in 2010



69% of all homes are digital

Digital Gap:

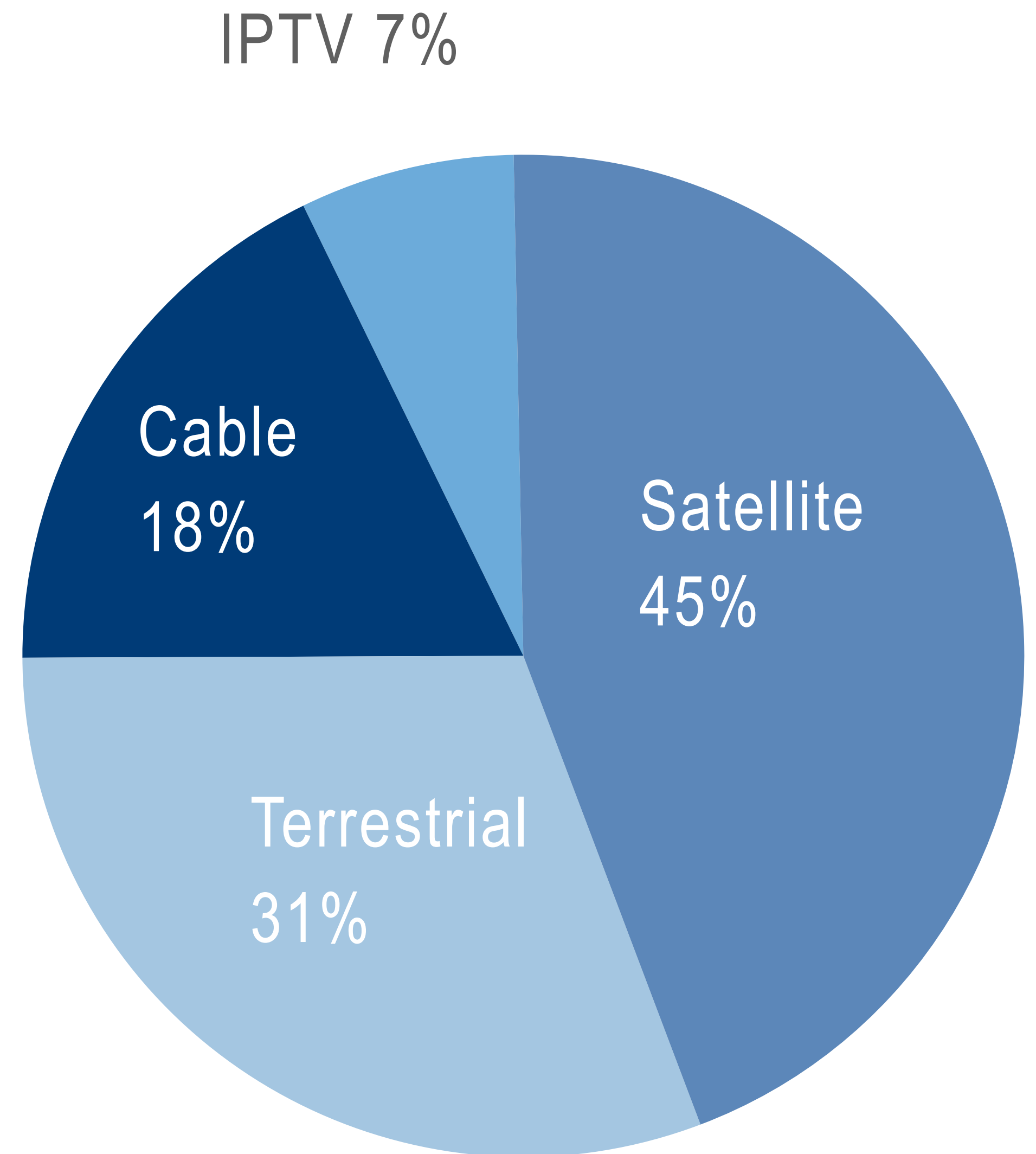
Western Europe: 79%

Eastern Europe: 40%

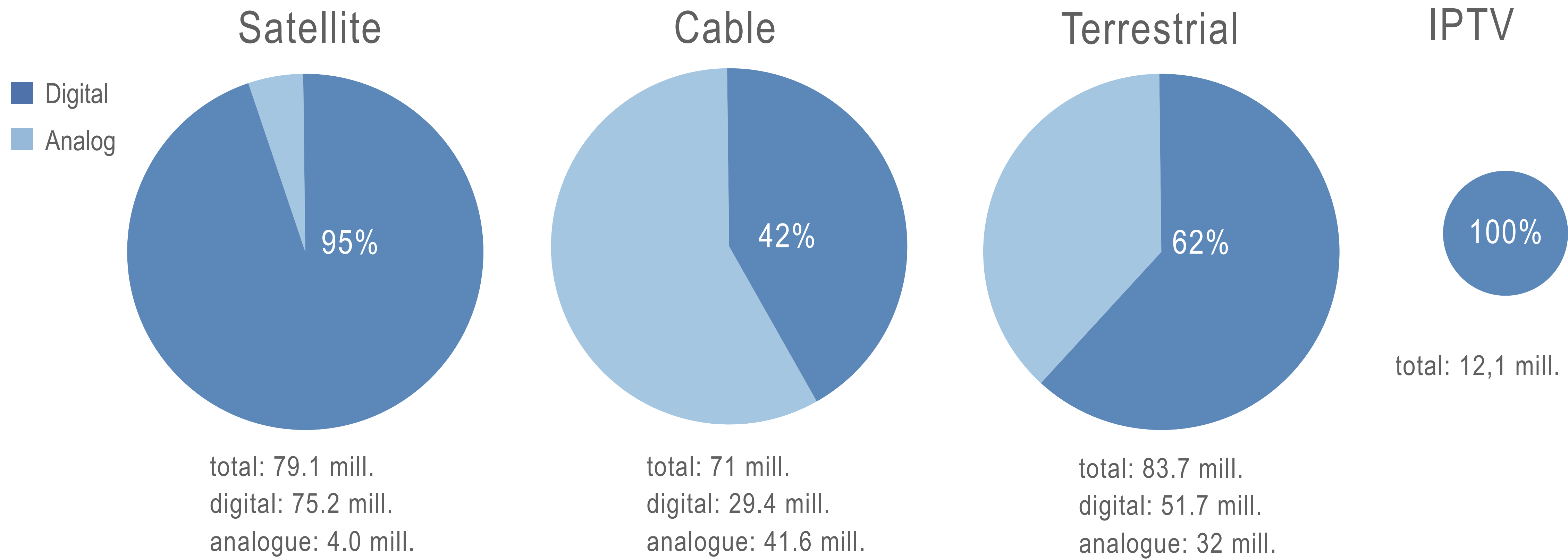


75.2 Satellite
51.7 Terrestrial
29.4 Cable
12.1 IPTV

Figures in million. Source: SES ASTRA, Satellite Monitor



Satellite is most advanced digital infrastructure



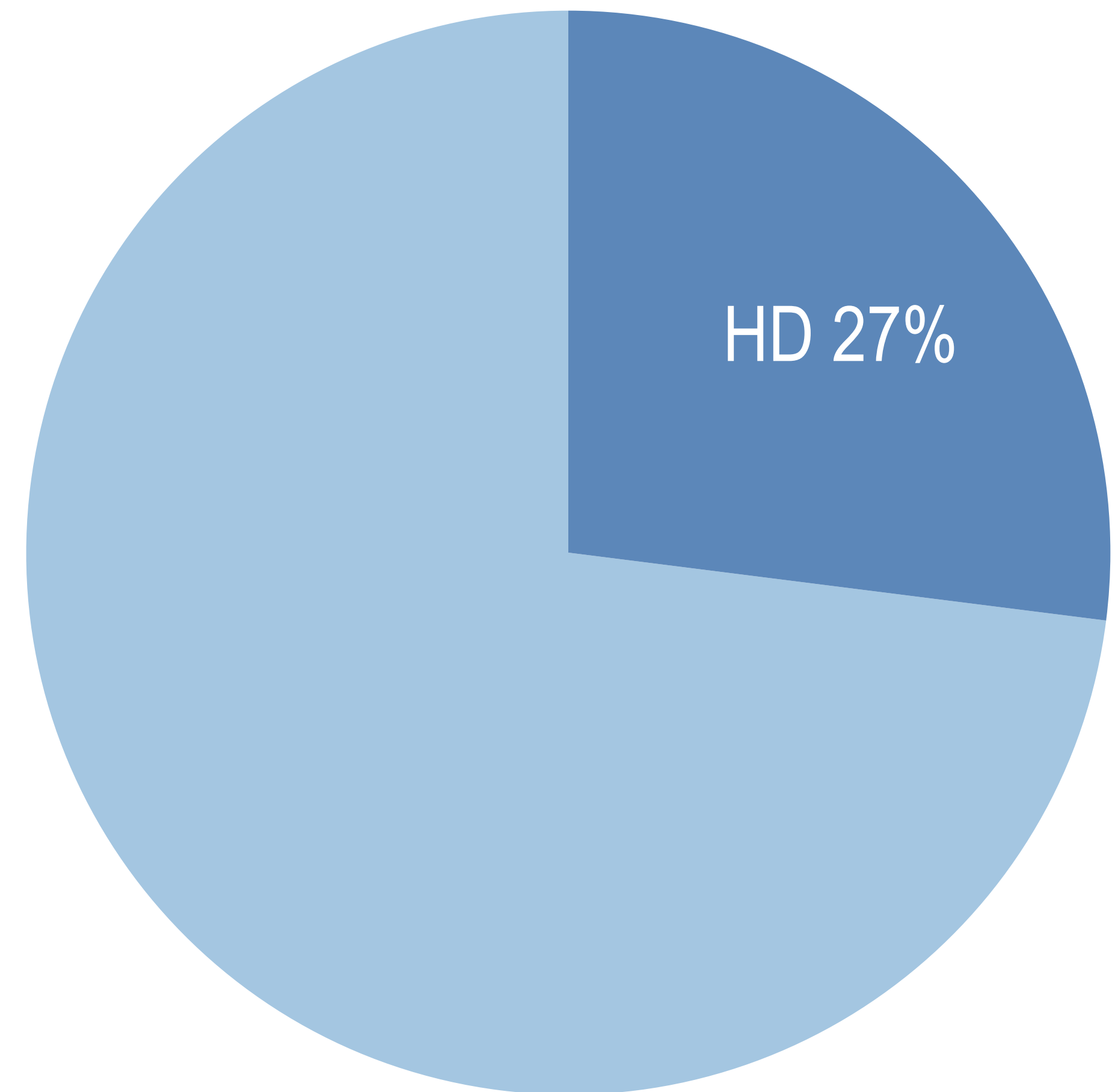
Source: SES ASTRA, Satelliten Monitor



HD is driving digitalisation

20 mill. satellite HD Homes

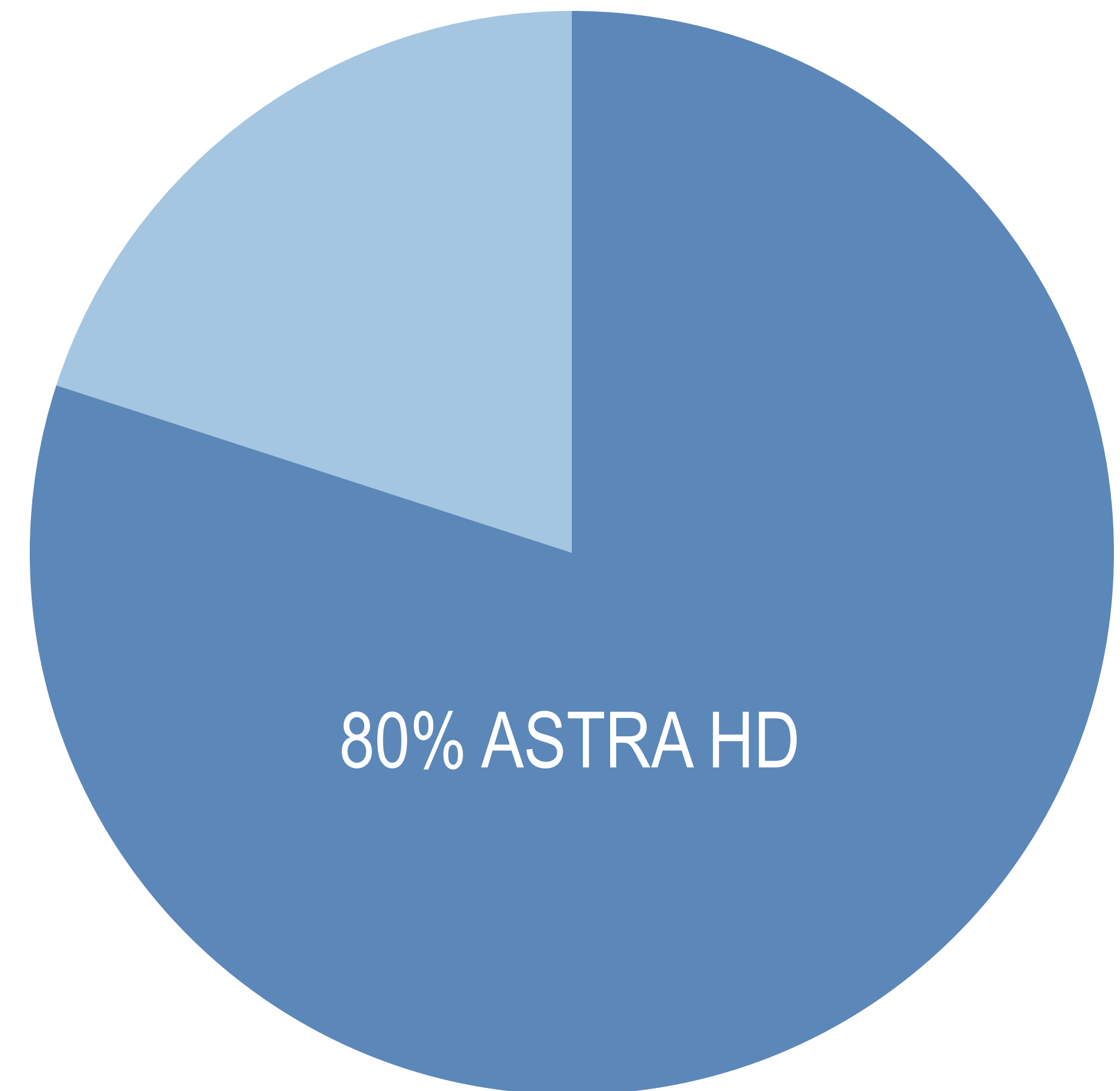
27% of all DSTV homes watch HD



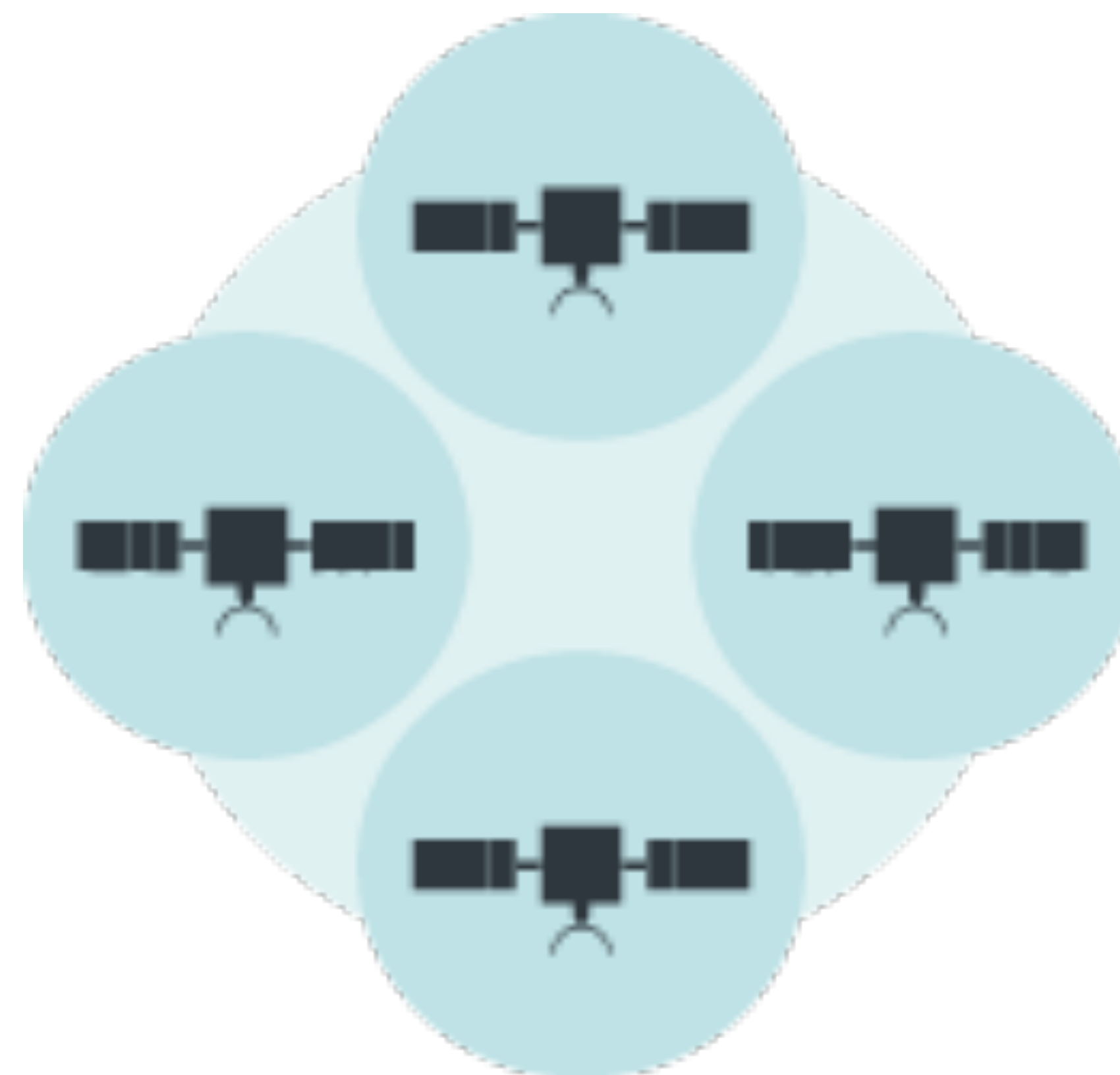
HD is driving digitalisation

16 mill. HD homes on ASTRA

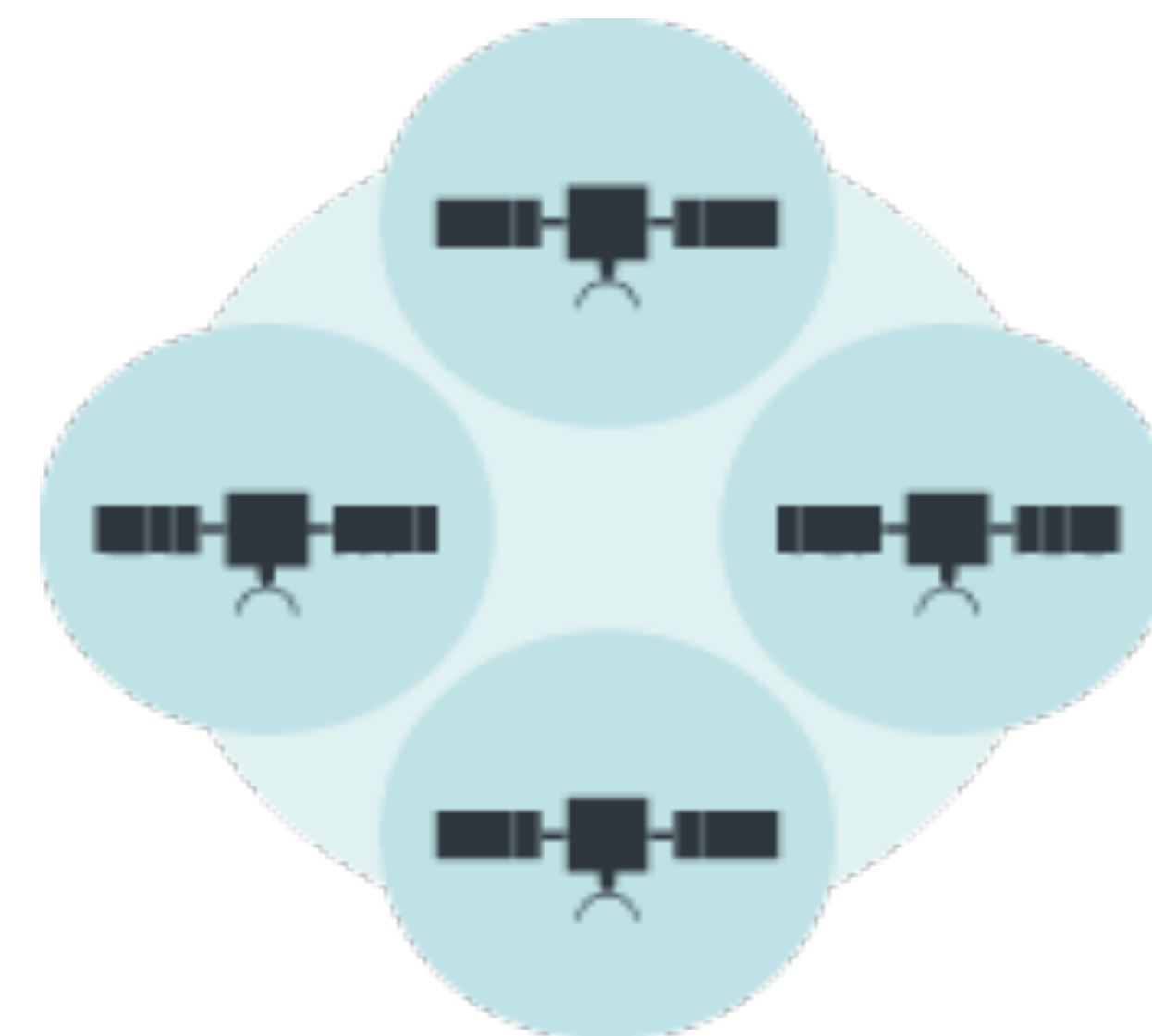
Representing a market share of 80%



Our fleet strategy

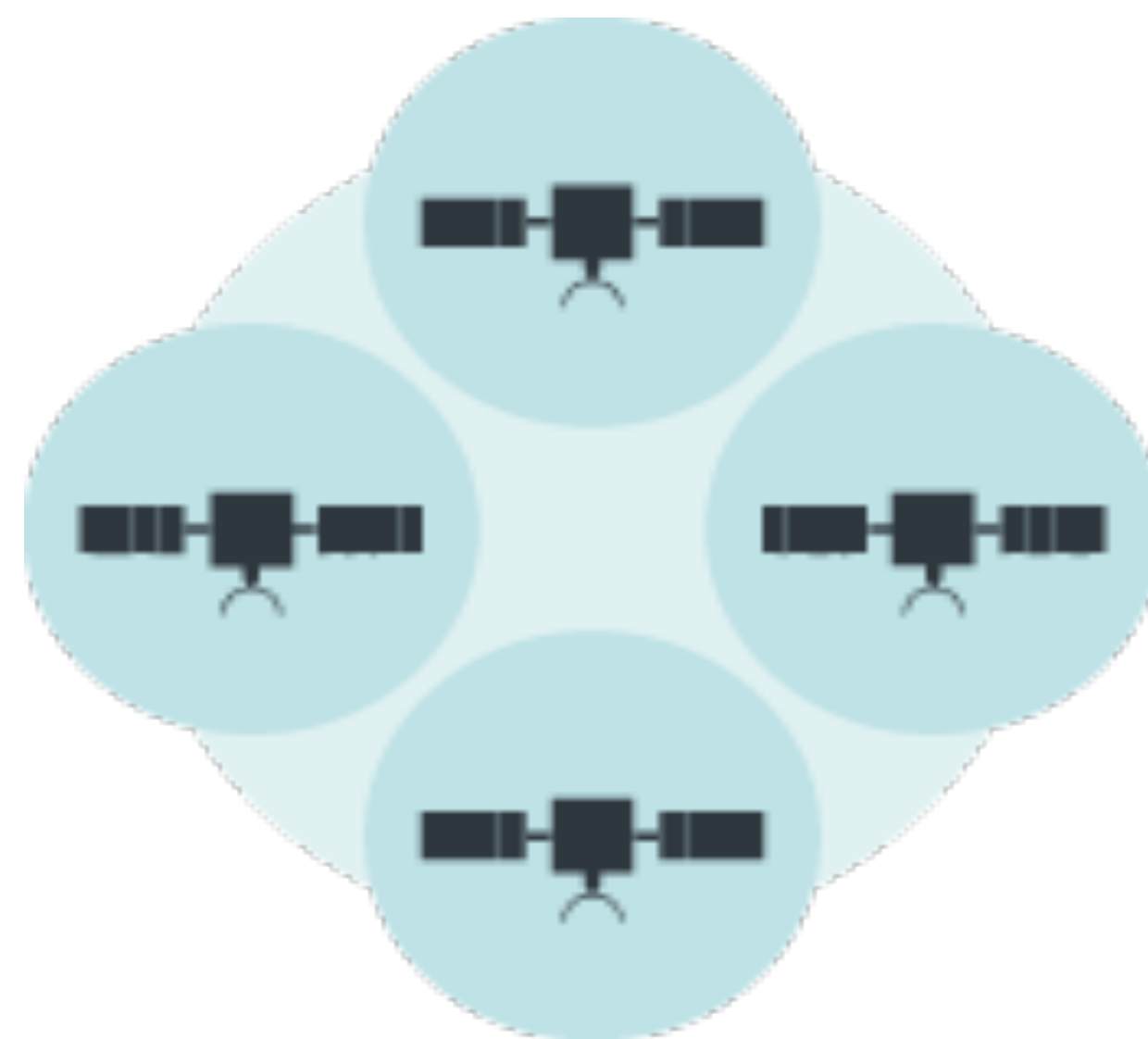


31.5 East



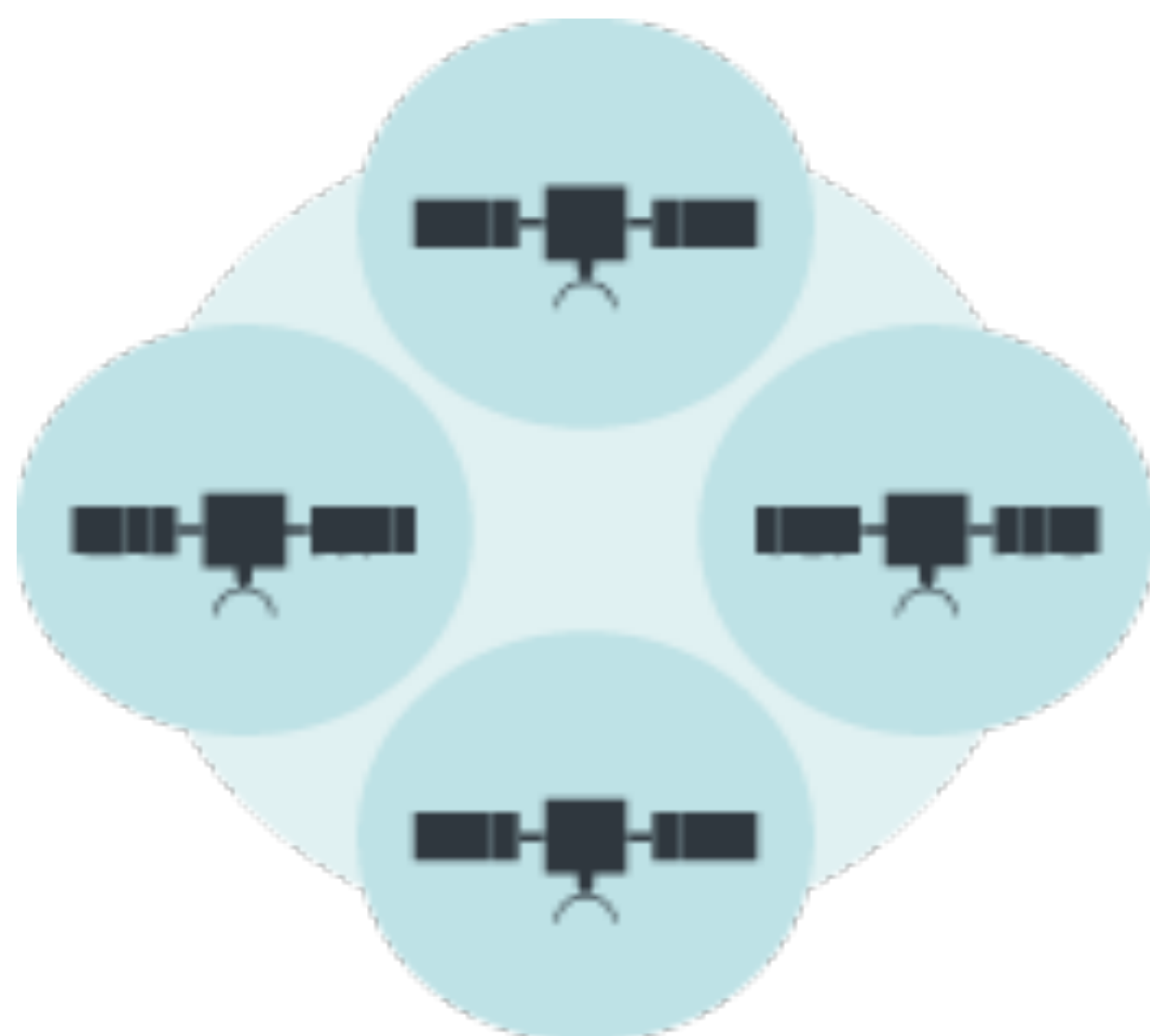
Cable and
terrestrial feeds

23.5 East



Hot spot for CEE/
Benelux
Complimentary
DTH-position

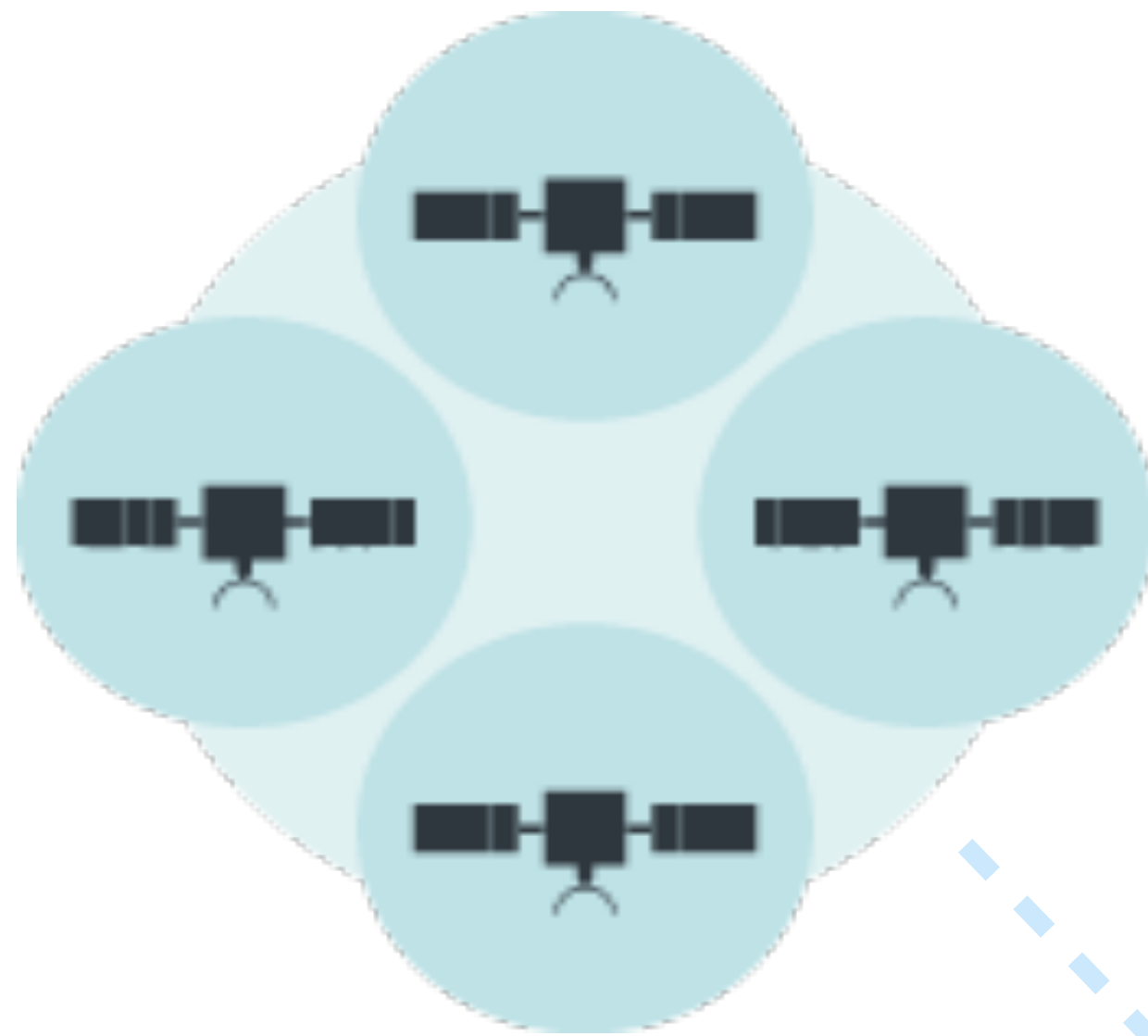
19.2 East



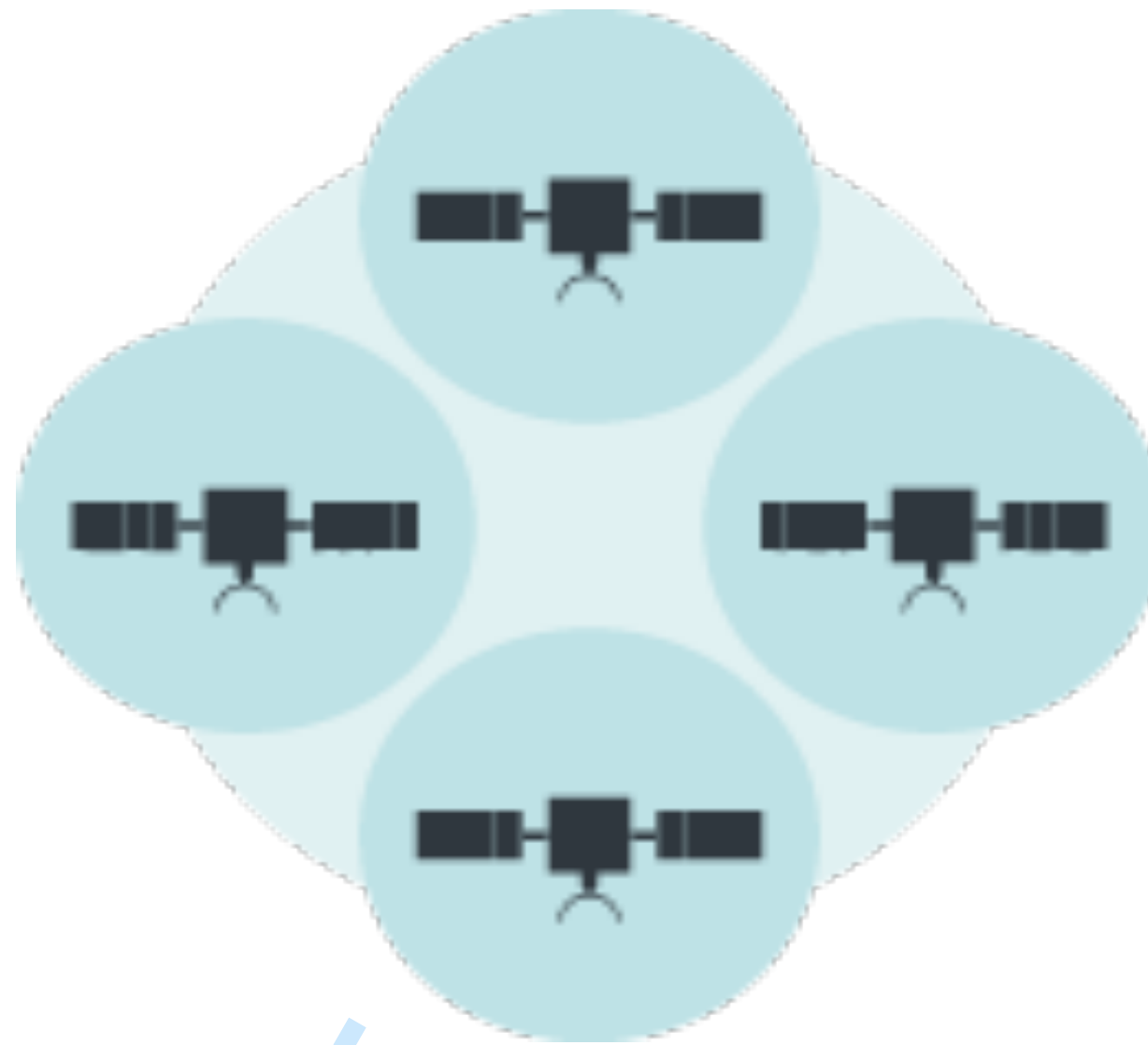
Prime
DTH-position

ASTRA duo-feed reception

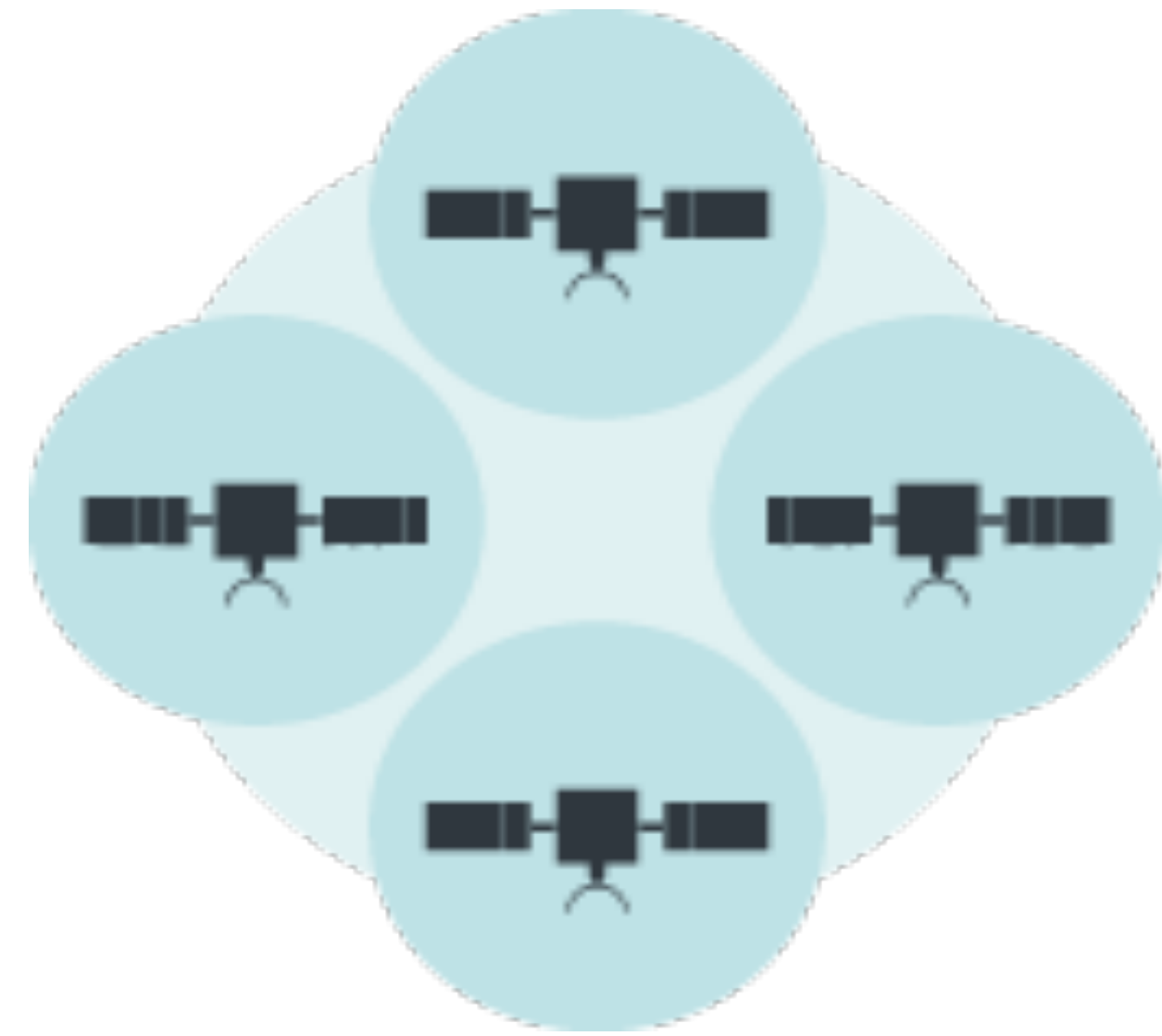
19.2 East



23.5 East



31.5 East



Benelux

1 mill. homes on ASTRA

740.000 homes on 23.5 East

40 percent growth in 2010



Czech Republic and Slovakia

1.6 million homes on ASTRA

1.2 million homes on 23.5 East

10 percent growth in 2010

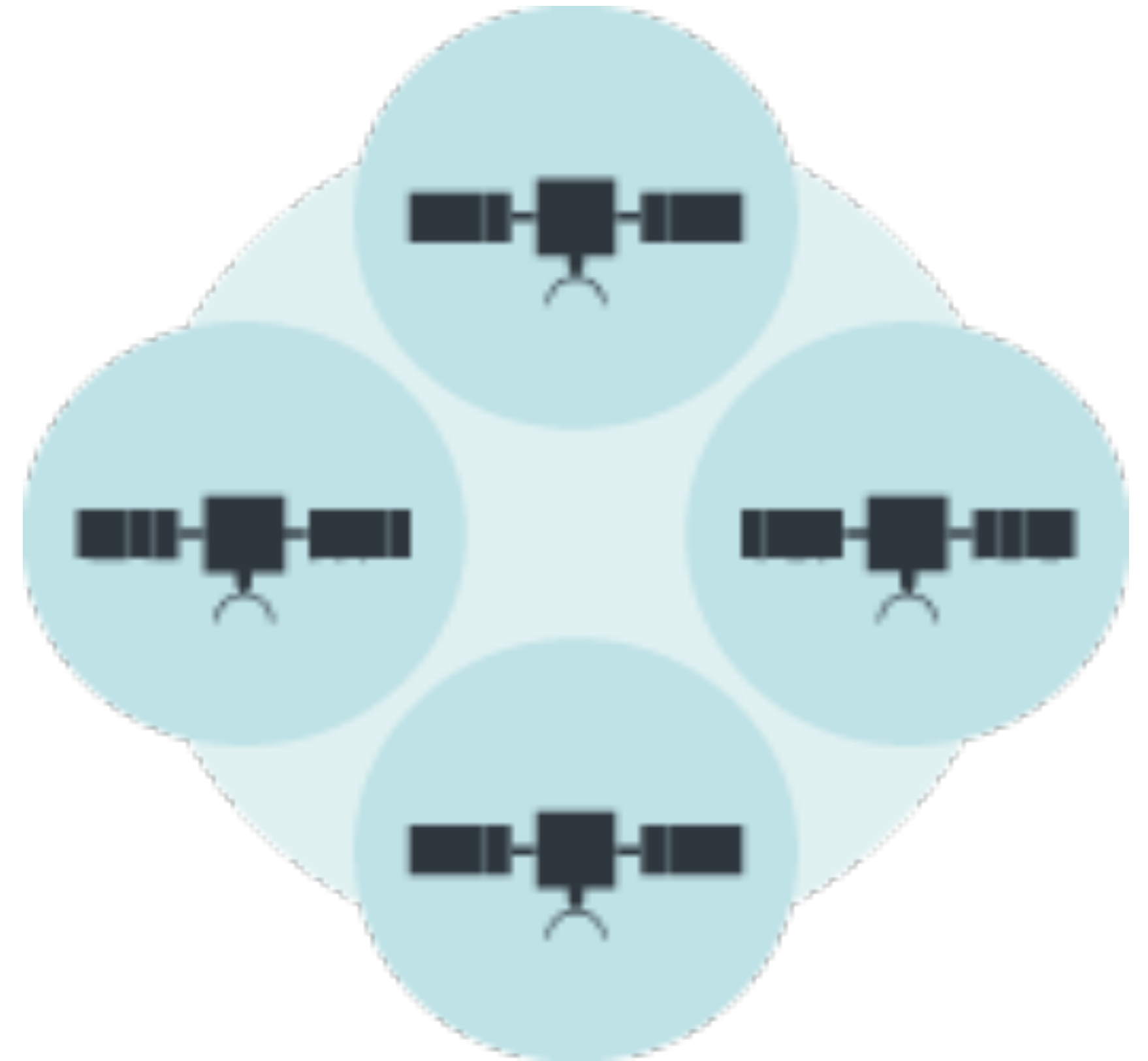


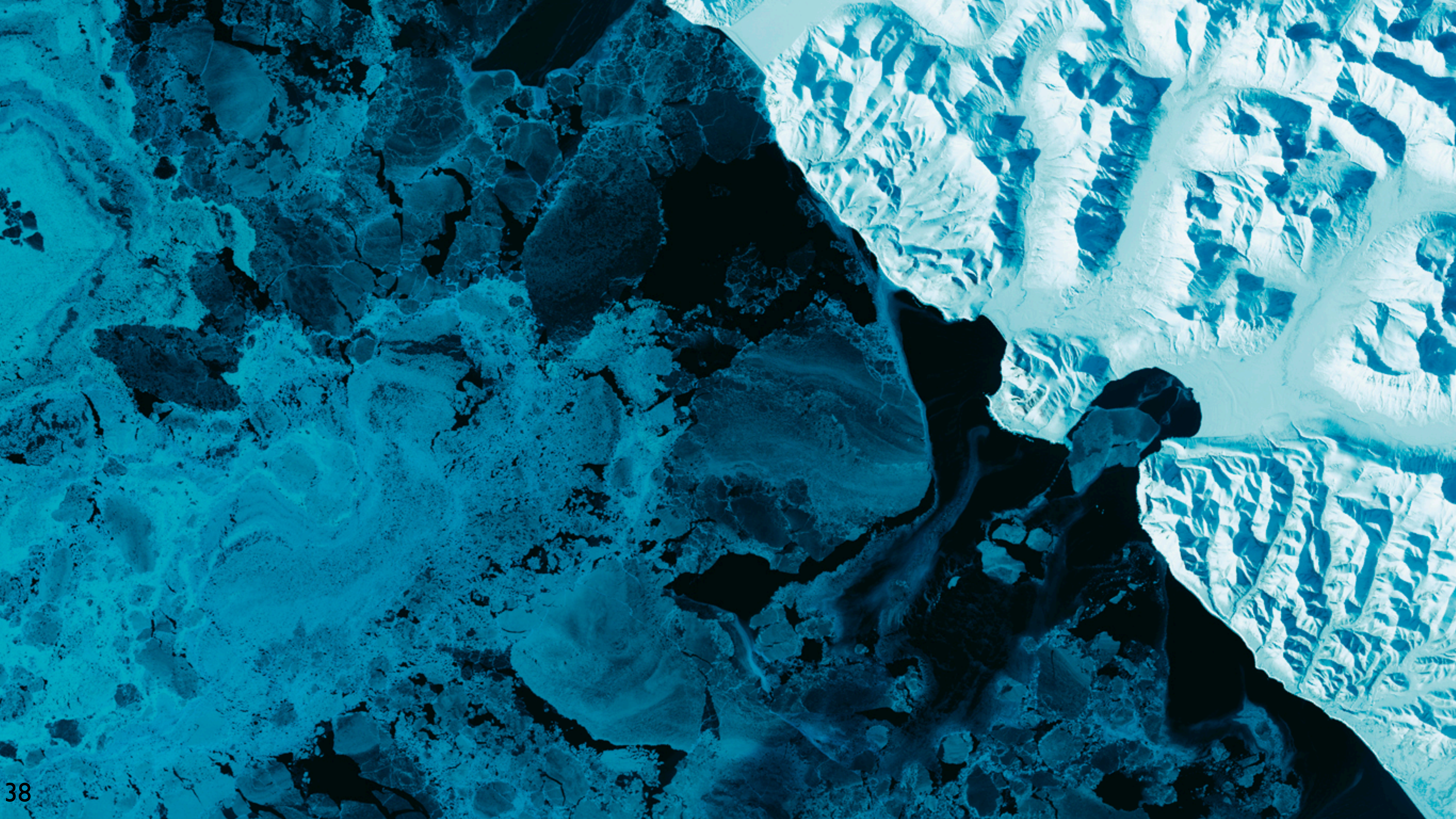
Strong growth on 31.5 East

Contribution for Ukrkosmos

Cable feeds for CME

Contribution for Tivuitalia





German TV market

Wolfgang Elsäßer,
Managing Director
ASTRA Deutschland



ASTRA increases reach

ASTRA provides TV programmes to 94 percent of all German TV homes

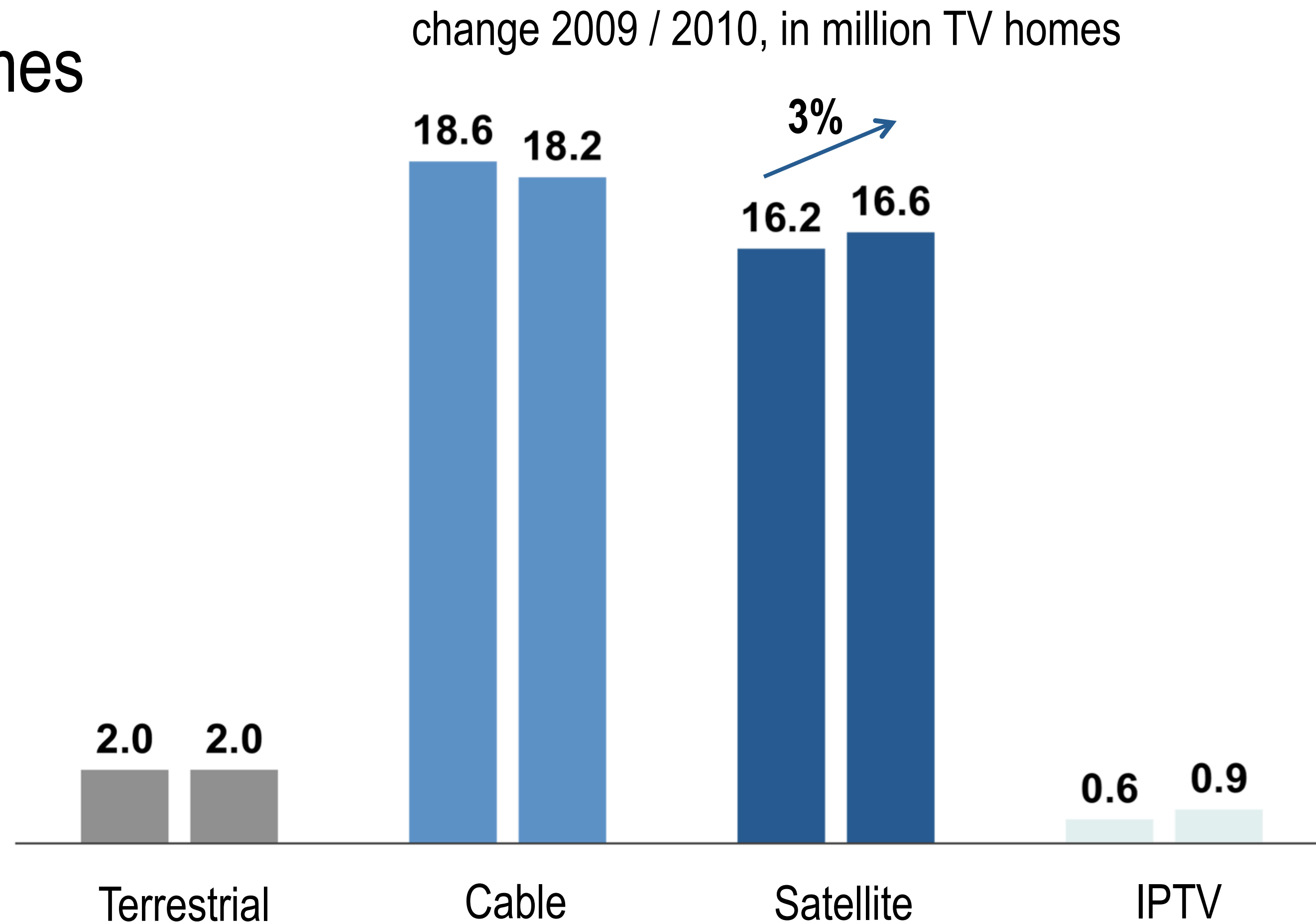
DTH reach increases from 16.2 to 16.65 million households

Satellite homes favour digital reception

Satellite up, Cable down

Satellite increases reach by 450,000 TV homes

Cable loses 430,000 TV homes



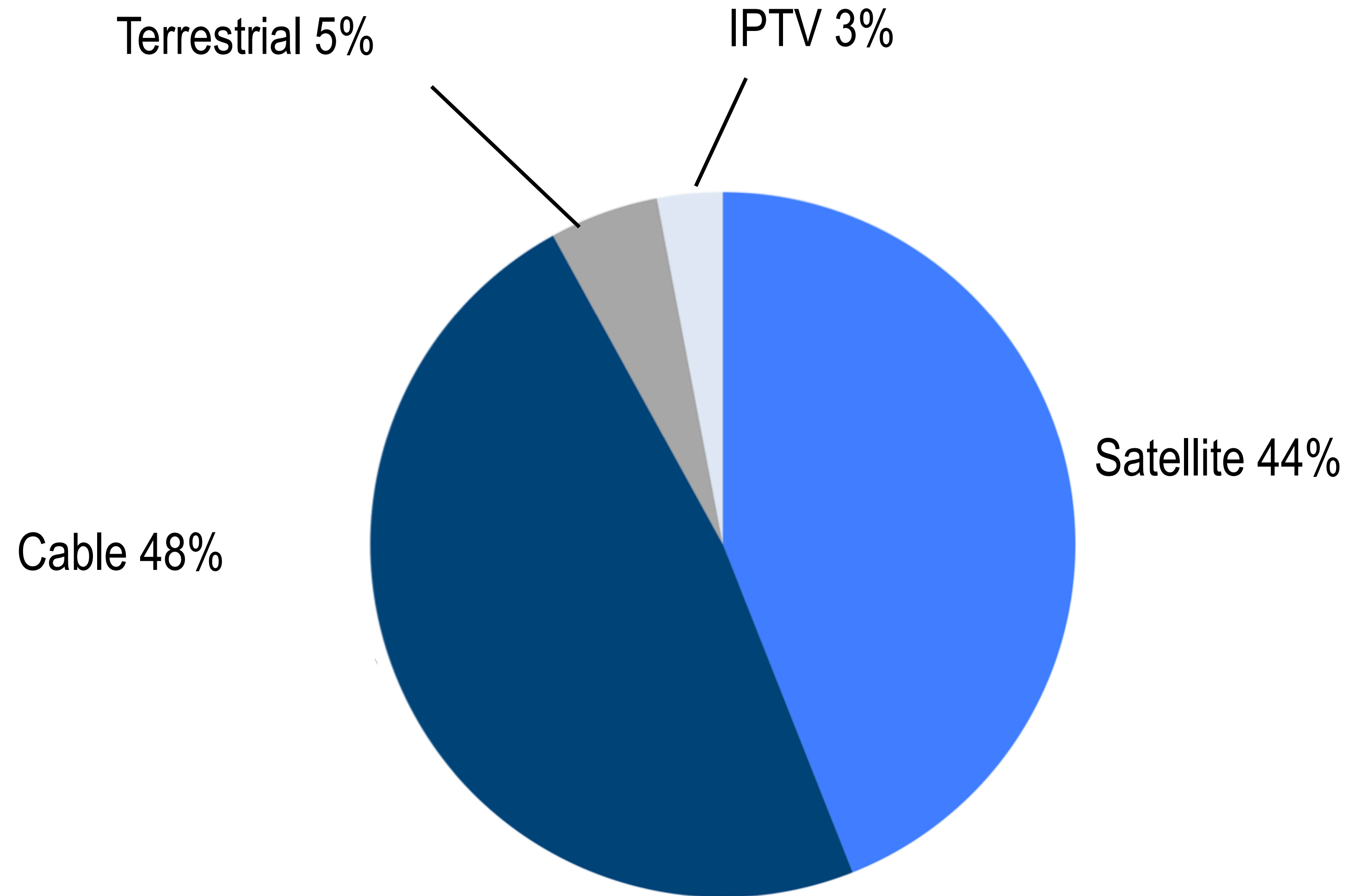
Source: SES ASTRA, Satellite Monitor

ASTRA increases reach

1,525

homes choose ASTRA as new TV infrastructure in 2010 – per workday

TV-reception in Germany: ASTRA strengthens position



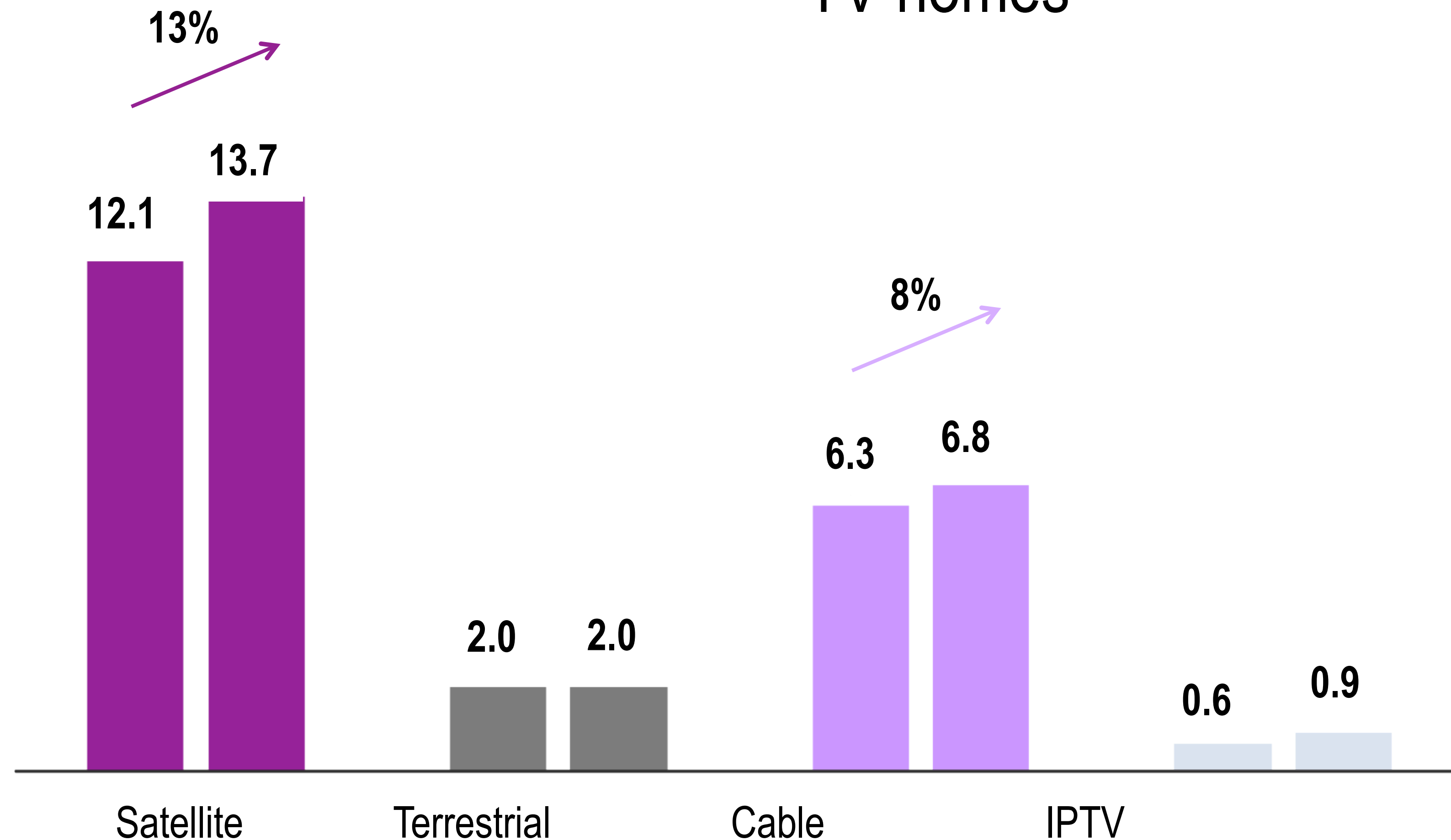
Base: 37.72 million TV homes in Germany

Source: SES ASTRA, Satellite Monitor

By comparison: the digital TV infrastructure in Germany

Digital DTH still growing faster than cable

change 2009 / 2010, in million TV homes



Source: SES ASTRA, Satellite Monitor

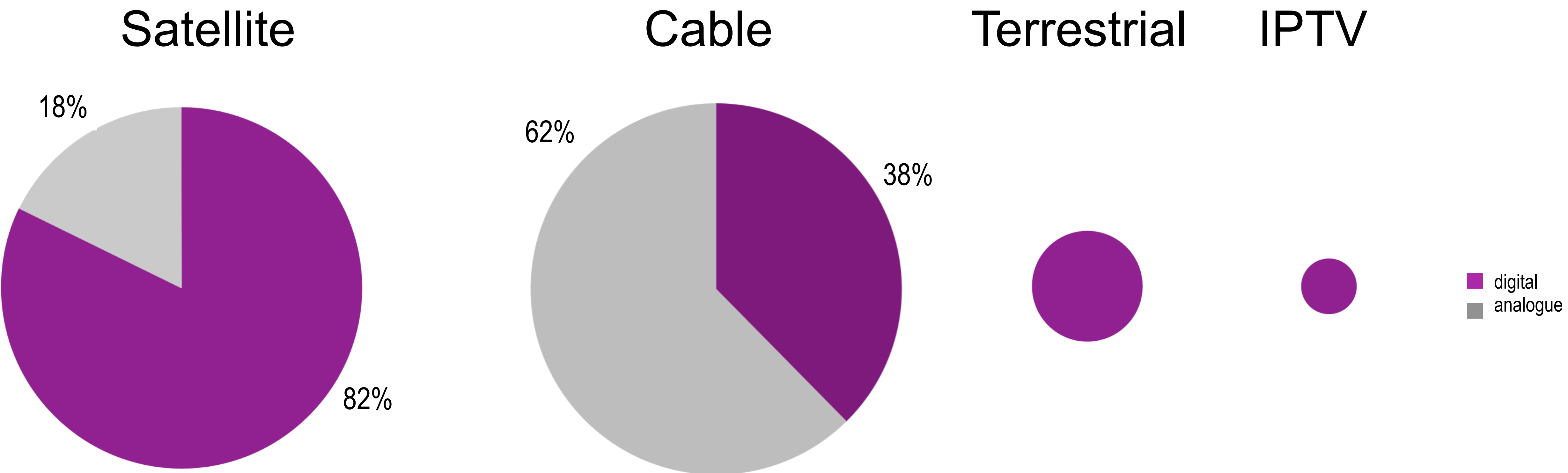


ASTRA: Compelling digital TV

5,423

Satellite TV homes went digital in 2010 – per workday

Satellite is the leading infrastructure for digital television

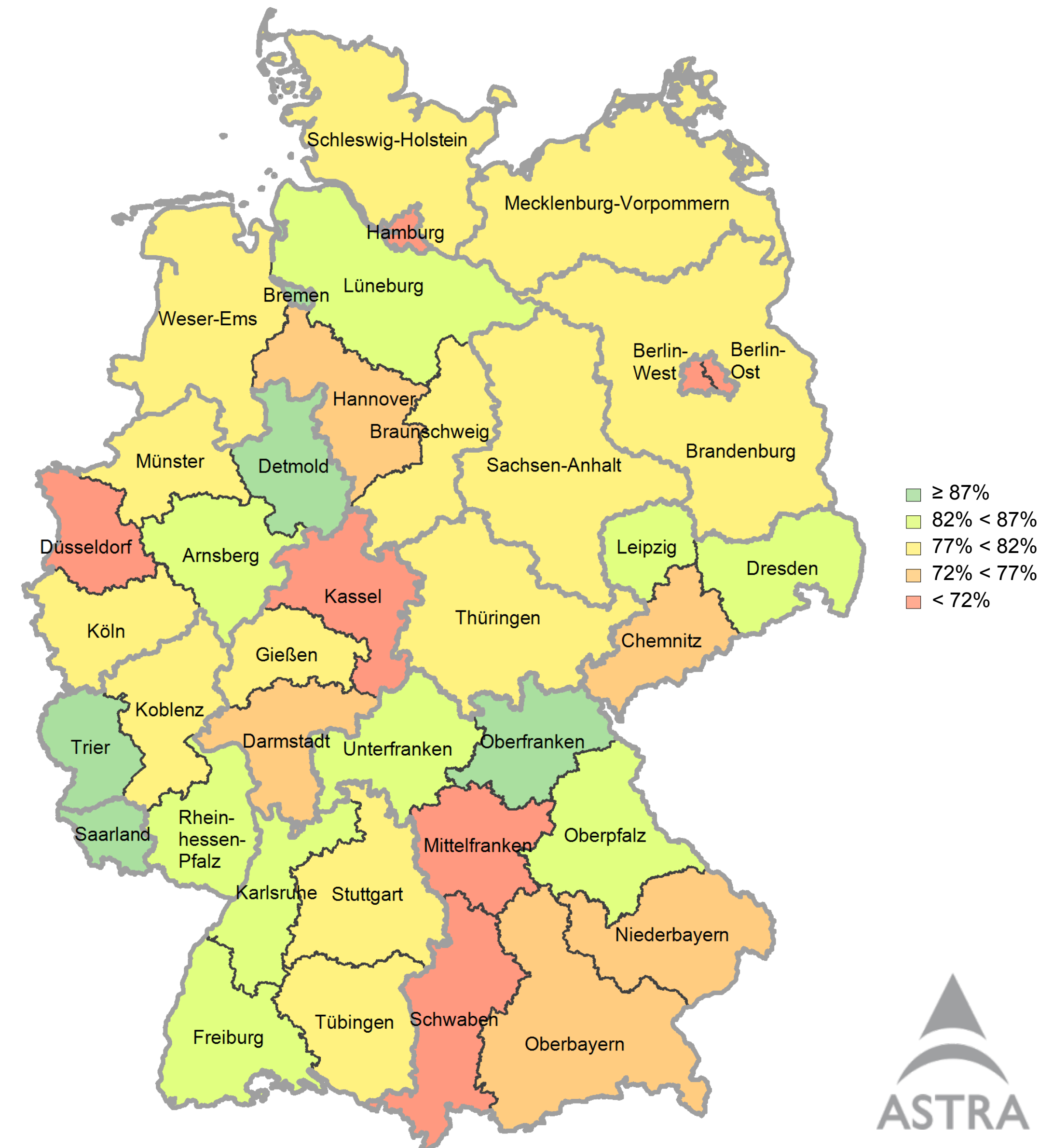


Source: SES ASTRA, Satellite Monitor



Digitalisation: considerable differences within federal states

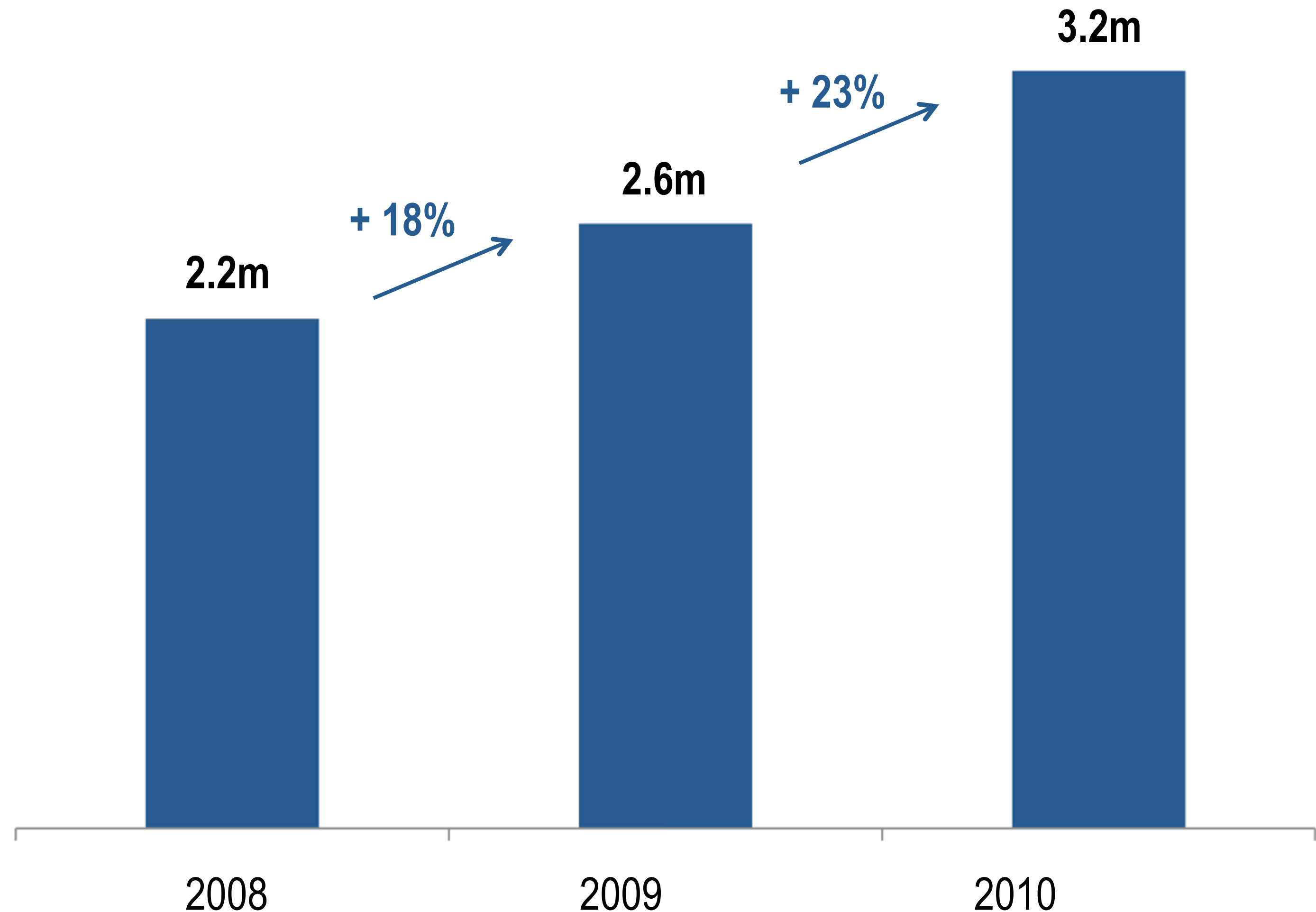
For comparison:
average rate of DTH digitalisation at 82 percent



Source: SES ASTRA, Satellite Monitor

Digital receivers: A steadily growing market

Dynamic growth in 2010, 3.2 million satellite receivers sold



Source: GfK Retail & Technology, January 2011

Digital receivers: A steadily growing market

11,000

Satellite receivers sold in 2010 – per workday



Partners count on ASTRA

300 DTH store departments optimised

2,500 CE stores trained

5,000 Retail and trade stores participate in ASTRA campaign

10,000 Sales people trained



Mit **analogem TV-Empfang**
ist bald Schluss!



Wollen Sie
ab 2012
in die Röhre
gucken?



2.9 million very good reasons to perform a fulminant finish

320

remaining workdays until April 30, 2012

9,000

analogue DTH homes need to go digital – per workday

18,000

digital satellite receivers need to be sold – per workday

Outlook 2011: the year of training

Focus solely on digitalisation

- !!! Campaigns and events together with all important trade organisations
- !!! Roadshow throughout Germany with partners from industry, retail and broadcasting
- !!! Regional initiatives together with broadcasters
- !!! Public Relations



HDTV: next generation of digitalisation

ASTRA main HD platform in Europe

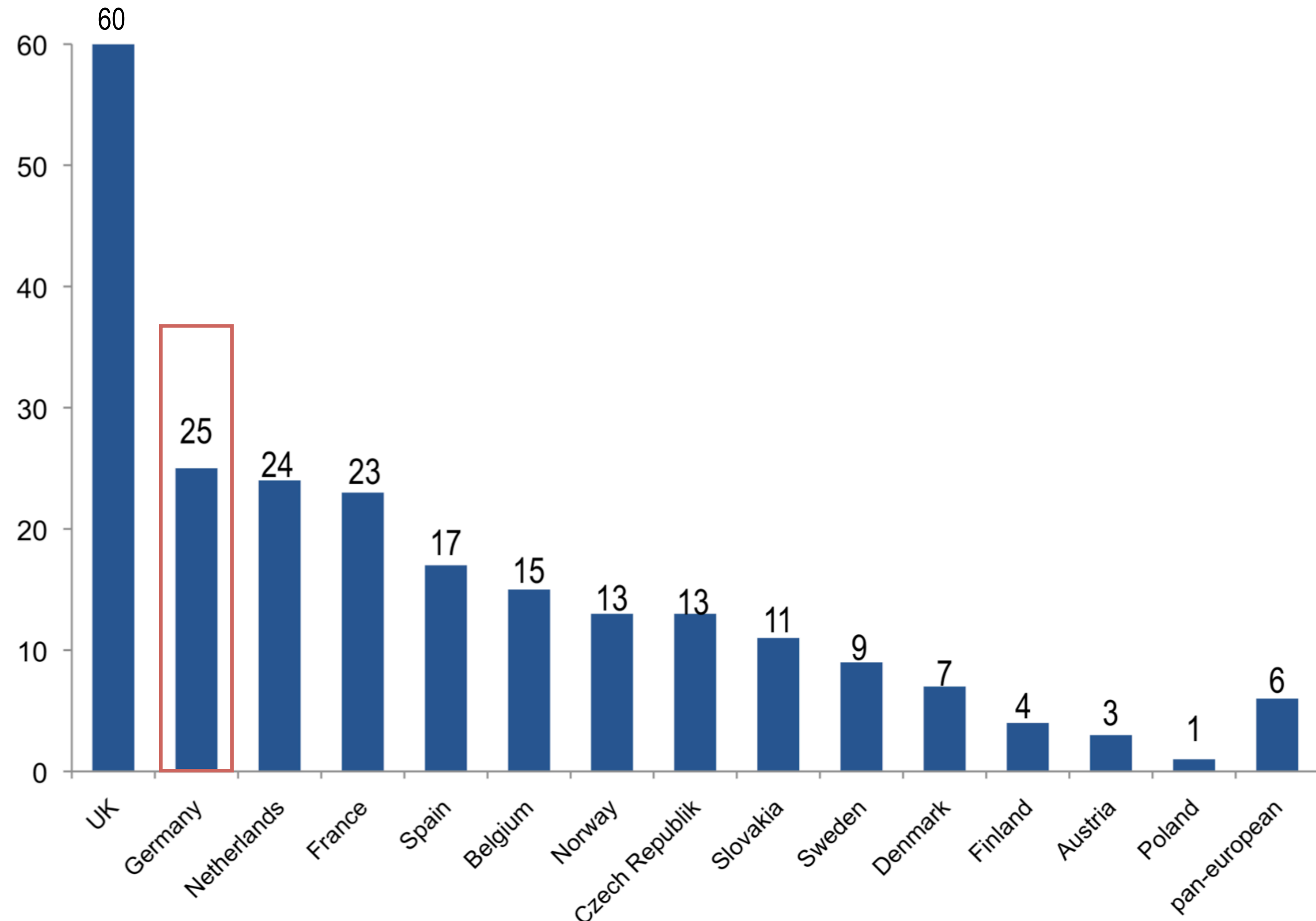
More than 200 HD channels via ASTRA

25 German-language HD channels available in Germany

Satellite is the most attractive infrastructure for HDTV

An impressive performance: Germany climbs from 17th into 2nd position

Via ASTRA satellite
available HD channels
in Europe per country

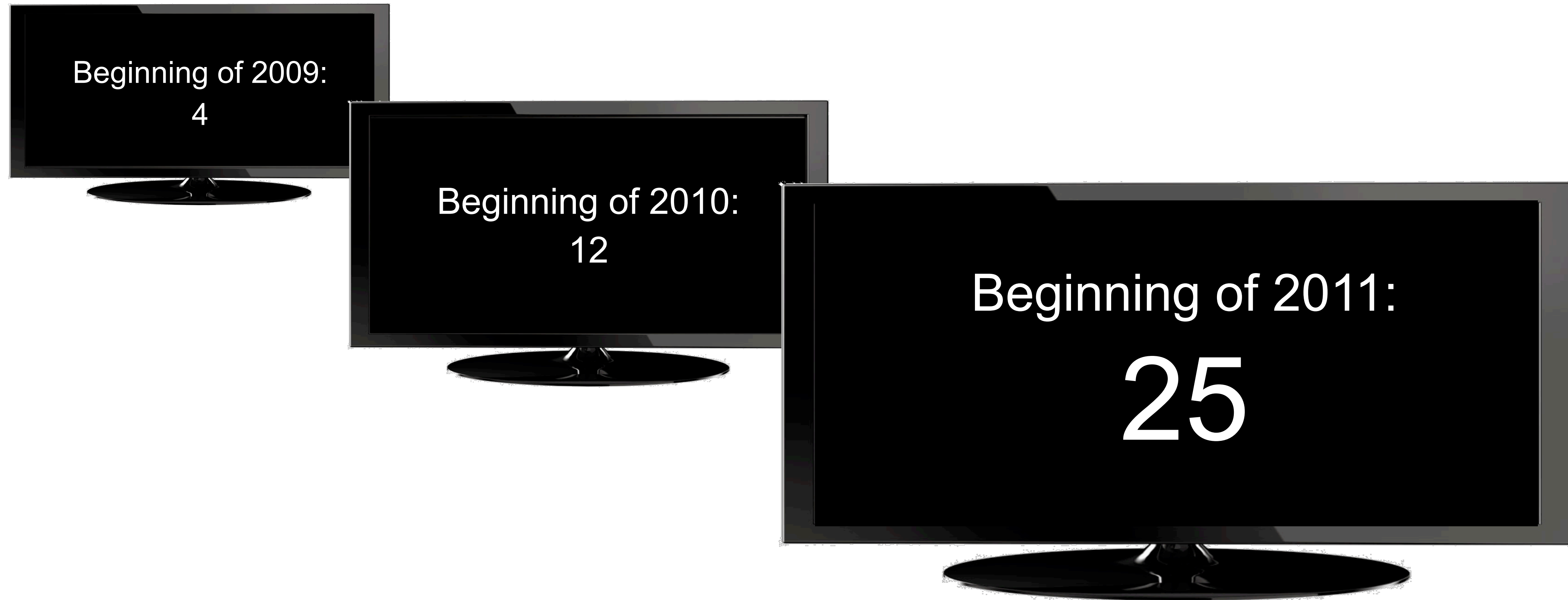


Sources: Lyngsat, KingOfSat, Internet, March 2011

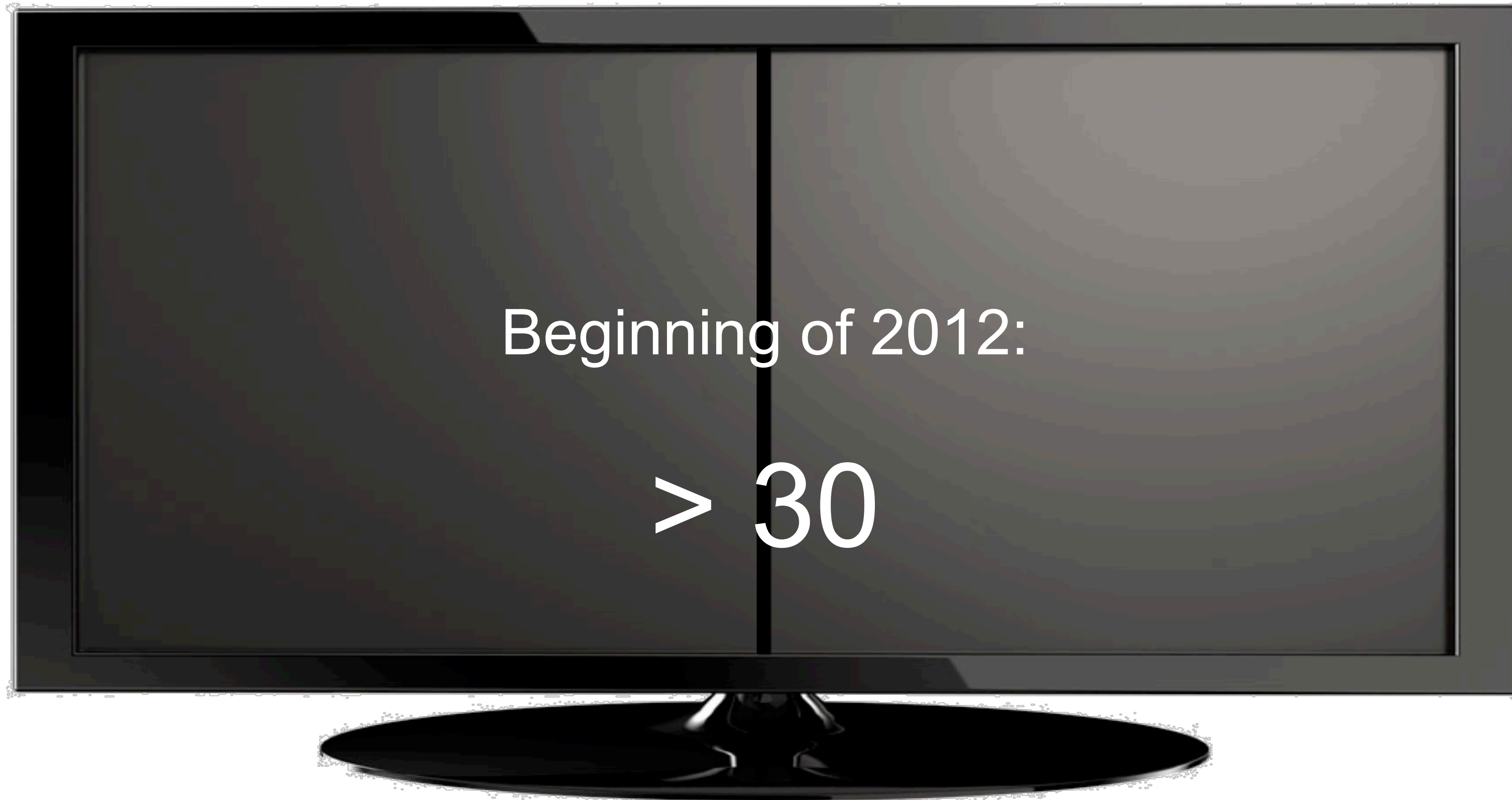


HDTV: a story of success from 2009 until 2011...

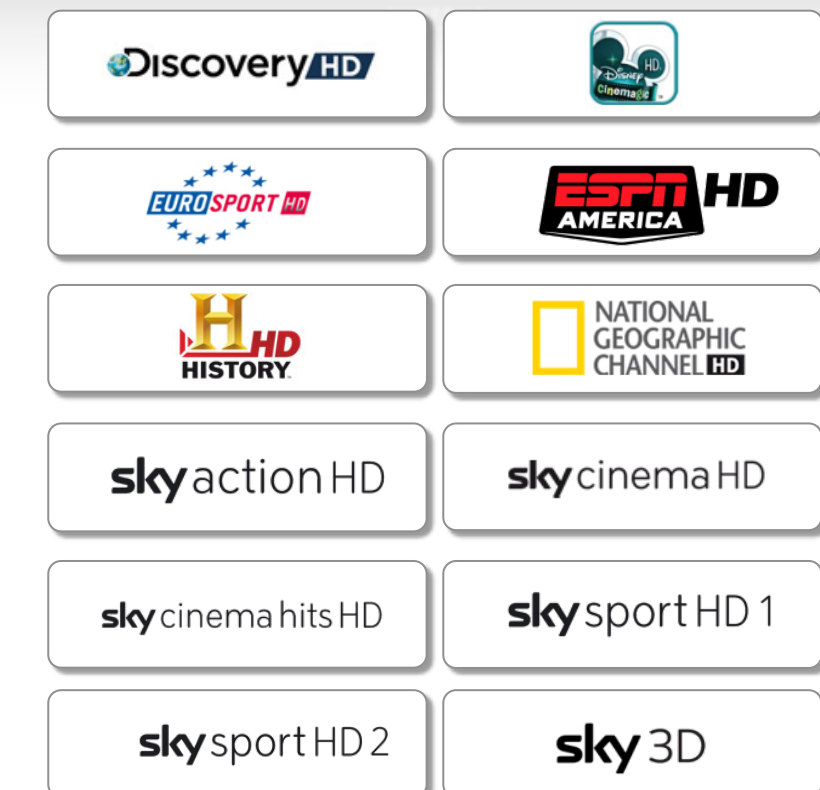
Available HD channels via ASTRA satellite in Germany



...to be continued



HDTV for every taste: Public TV, Free-TV, Pay-TV



Germany is “HD ready”

31 million “HD ready” screens sold

More than 30 percent of all HDTV-STB’s are HD+ receivers

20 percent of all ASTRA homes are already watching HD programs



by ASTRA

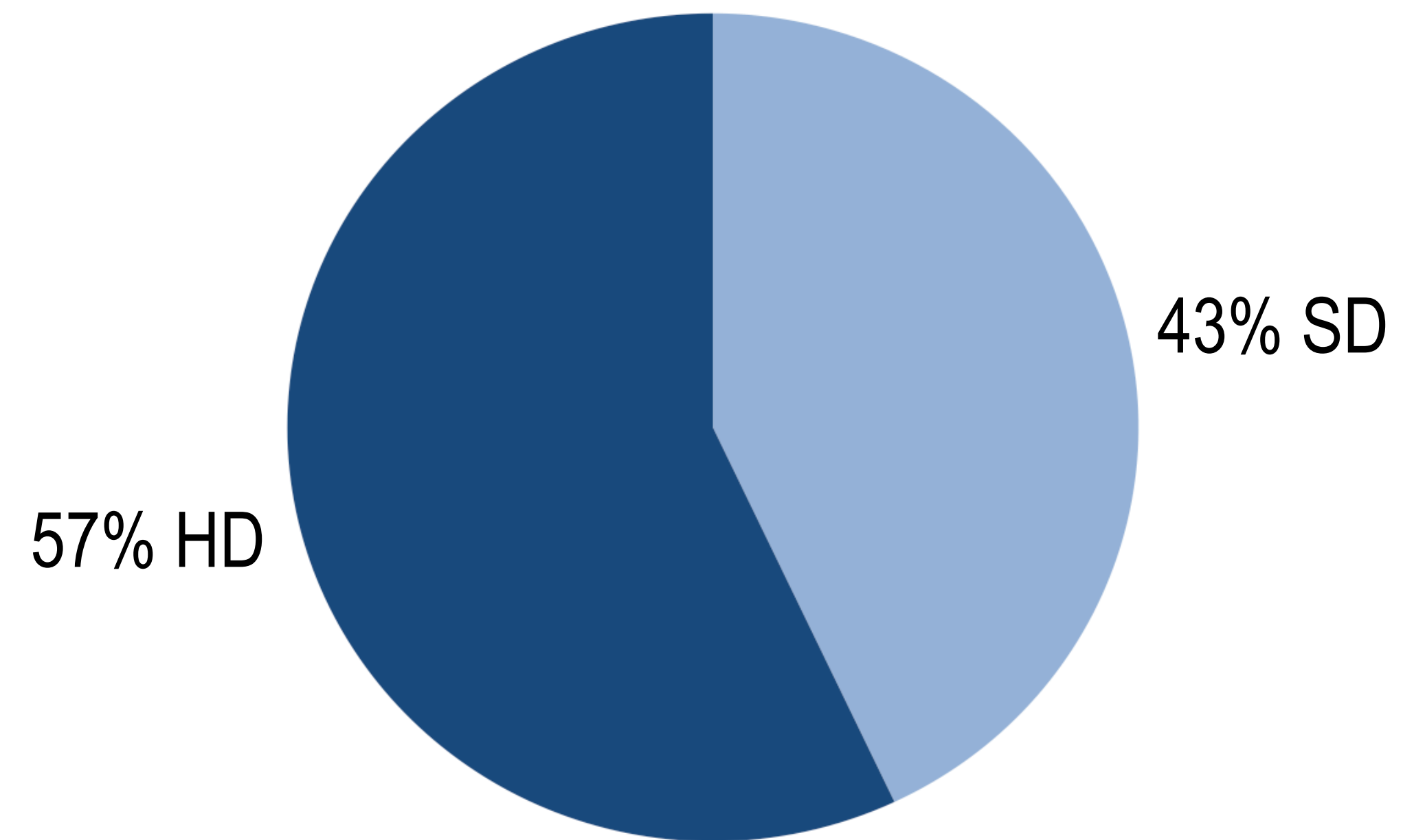
Source: GfK Retail & Technology



HDTV prevails

Nearly 60 percent of all DTH receivers sold in 2010 are HD capable

Estimated increase 2011: approx. 2 million HD devices



Source: GfK Retail and Technology, January 2011

Successful year 2010 – promising 2011 ahead

Satellite increases total reach by 3 percent to 16,65 million TV homes

ASTRA strengthens leading position in digital TV:
four out of five ASTRA TV homes are already digital

Germany is HD ready: ASTRA is the most attractive infrastructure both for
broadcaster and viewers

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