



ASTRA Reach 2009 Europe



ASTRA group* Reach 2009

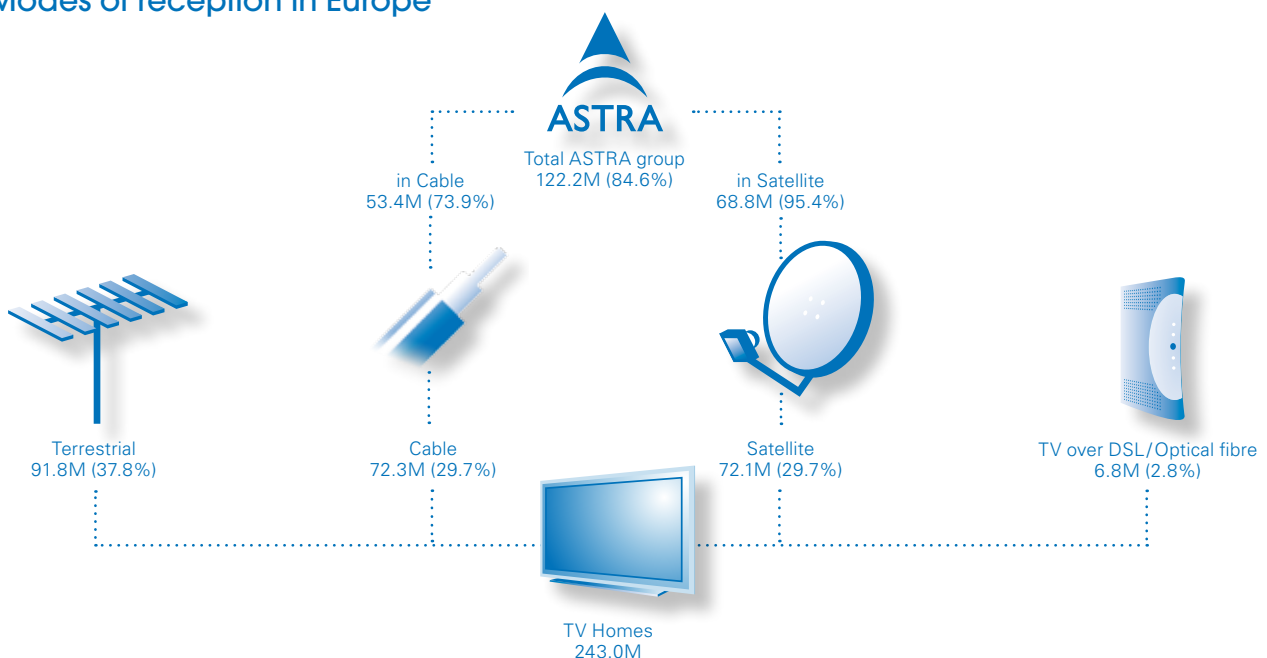
* ASTRA group reach includes ASTRA at 19.2°E, 23.5°E, 28.2°E and SIRIUS at 5.0°E

** 35 countries within the ASTRA group footprint

Highlights Europe**

- > At year end 2008, 122.2 million homes receive audiovisual broadcast and broadband services via ASTRA at 19.2°, 23.5°, 28.2° East or SIRIUS at 5.0° East.
- > The ASTRA group consolidated its position as the top European satellite fleet for DTH reception.
- > By end of 2008, 53.4 million homes receive ASTRA or SIRIUS services directly via satellite. A further 68.8 million homes receive services via ASTRA group satellites in cable.
- > More than half of all TV homes within the ASTRA group footprint are now receiving digital services.
- > Satellite continues to be the most popular digital reception mode, with a 52% share of the total digital market.
- > 88% of all ASTRA satellite homes are digital.

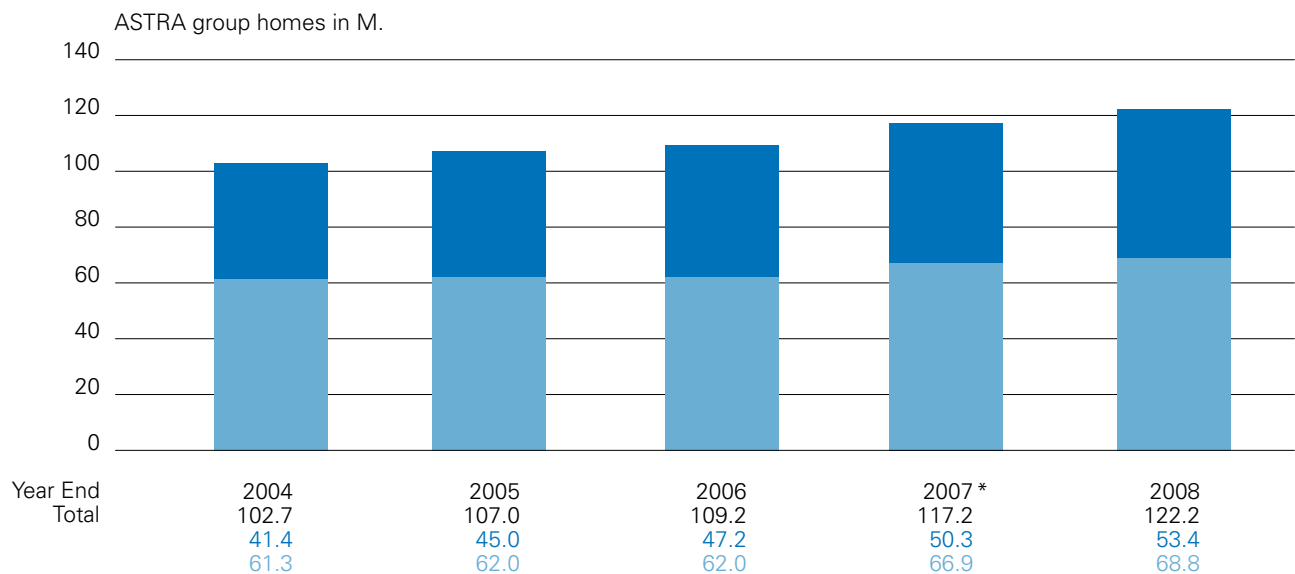
Modes of reception in Europe



ASTRA group reaches more than 50 million satellite homes

- > The ASTRA group consolidated its position as the top European satellite fleet for DTH reception, reaching 53.4 million satellite homes in Europe and North Africa.
- > These homes are served via the four orbital positions of the ASTRA group satellite fleet:
 - 41.0 million satellite homes receive programming transmitted via ASTRA at 19.2°E.
 - 1.1 million satellite homes receive digital signals from 23.5°E.
 - 10.1 million satellite homes watch ASTRA digital services via 28.2°E.
 - The SIRIUS satellites at 5.0°E reach 3.9 million digital satellite homes.
- > Another 68.8 million homes are served indirectly by ASTRA or SIRIUS through cable networks.

Total ASTRA group coverage



■ DTH/SMATV
■ Cable

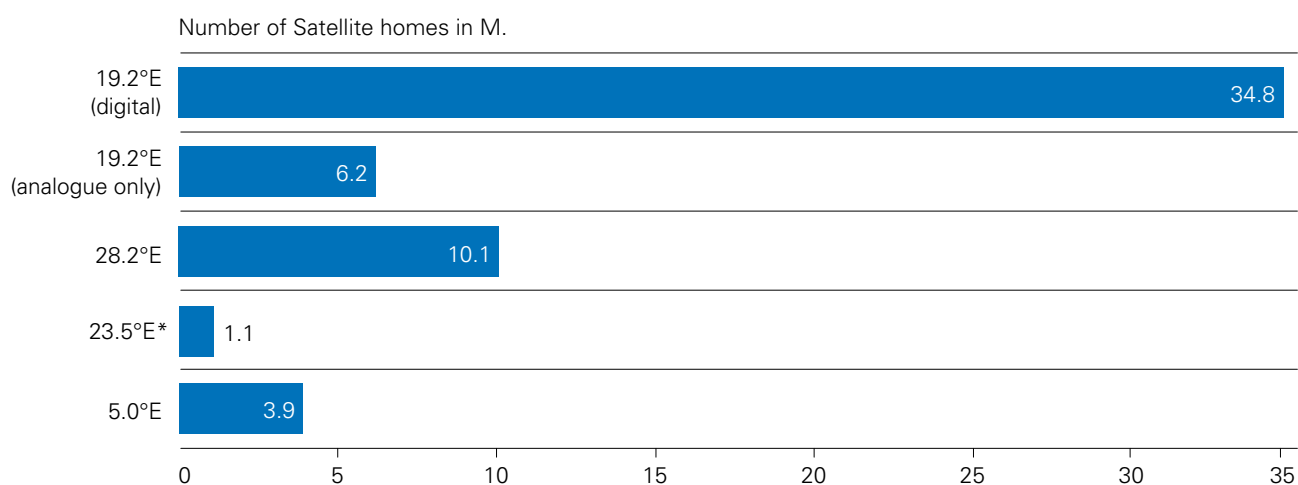
*since Year End 2007 incl. SIRIUS reach
Source: SES ASTRA, Satellite Monitors

ASTRA Reach 2009 – Europe

Almost 9 out of 10 ASTRA group satellite homes are digital

- > ASTRA group DTH/SMATV growth in 2008 was driven by digital satellite reception.
- > The ASTRA group satellites are serving 47.2 million digital satellite homes; 34.8 million homes at 19.2°E, 10.1 million at 28.2°E, 1.1 million at 23.5°E and 3.9 million at 5.0°E.
- > 6.2 million ASTRA homes still receive exclusively analogue signals via 19.2°E. More than 80% of these homes are in Austria, Germany and Switzerland.
- > 3.6 million homes receive both analogue and digital services from ASTRA.

ASTRA group reach by orbital position



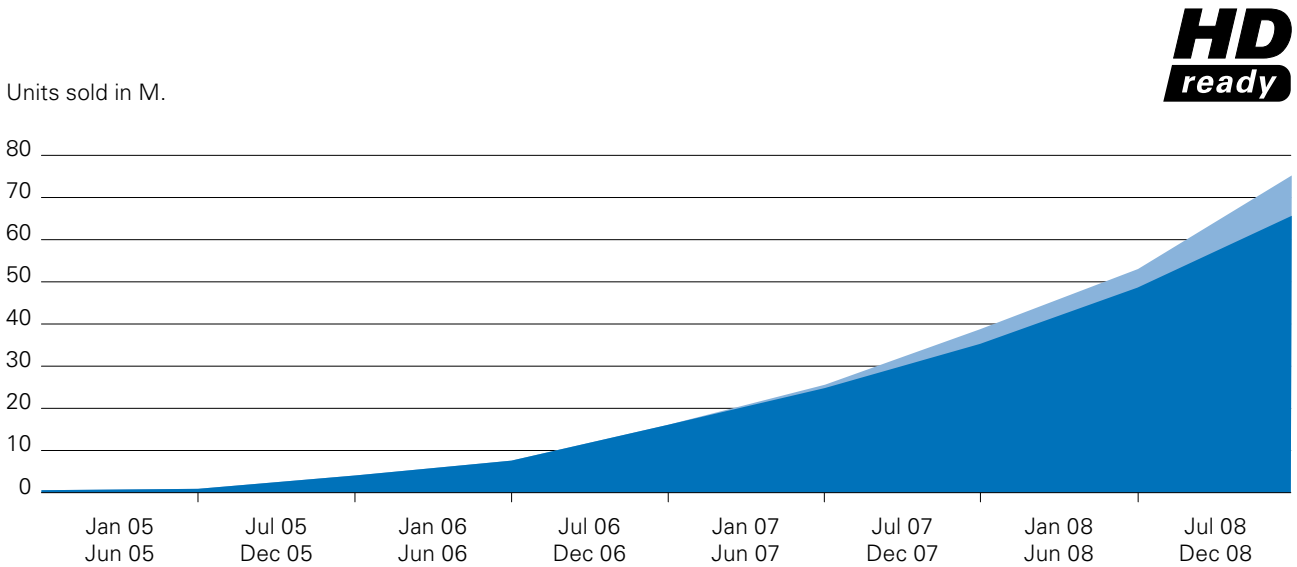
The figures do not add up to the total ASTRA group reach due to homes receiving from two of these orbital positions at the same time (dual feed).
*Most of the 23.5°E homes also receive services from ASTRA at 19.2°E, notably using the Duo LNB.
KDG (Kabel Deutschland GmbH) uses the ASTRA Satellites at 23.5°E to feed cable networks in Germany.
Source: SES ASTRA, Satellite Monitors, Year End 2008

HDTV

More than 74 million HD ready TV households in Europe

- > During 2008, the developments concerning HDTV have continued to take up speed:
 - > More than 74 million HD ready TV sets have been sold in Europe since January 2005, representing around 44% of all European TV homes. Almost 37 million of these were sold in 2008.
 - > Sales were driven by the attractiveness of larger flat screens, a further price decrease for HD ready sets and extended HD content offers in 2008.
 - > Germany, UK and France continue leading in terms of sales volume.
- > Satellite continued to be the driver for HDTV channel growth across Europe and ASTRA further developed its line-up of HD channels.
 - > At Year End 2008, ASTRA carried 64 commercial HD channels on its satellites over Europe (including the SIRIUS satellites at 5.0°E). A lot of these channels are broadcast exclusively on ASTRA.

Sales of HD ready TV sets



- Full HD screens
- HD ready screens

Source: GfK Retail and Technology, December 2008
 Type of Screens: LCD, Plasma, Rear projection
 Europe: AT, BE, CZ, DEN, FIN, FR, DE, GR, H, IT, NL, PL, PT, SVK, ESP, SWE, CH, GB

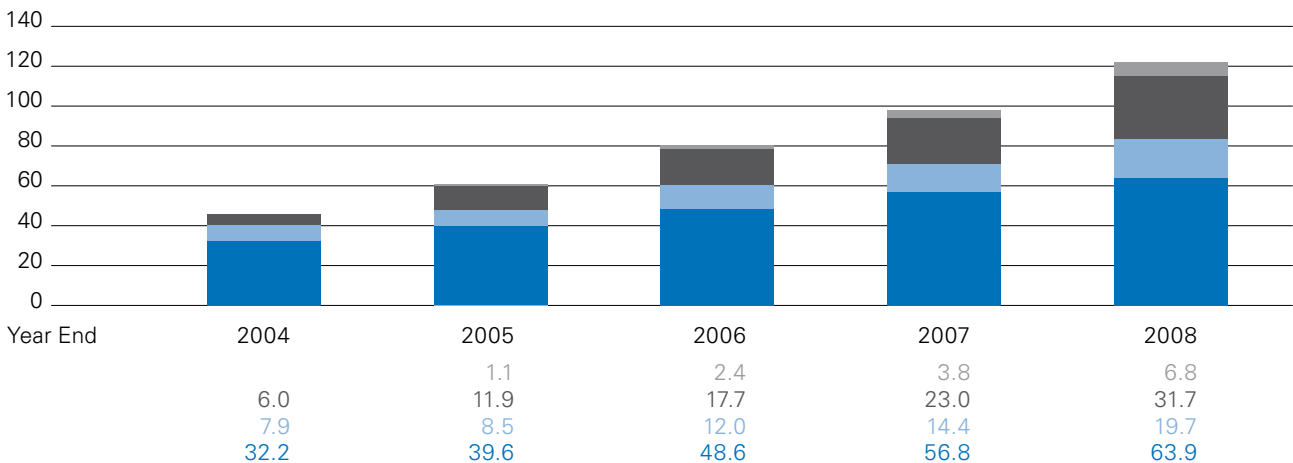
Broadcast markets

Satellite drives digital growth

- > The growing number of digital TV, radio and interactive channels have boosted total digital reception to more than 122 million satellite, cable, terrestrial and DSL homes.
- > More than half of all TV households in the 35 countries within the ASTRA group footprint are today digital.
- > Digital satellite growth was mainly driven by Ukraine (+1.7 million homes), Germany (+1.4 million homes), Poland (+1.3 million homes), UK & Ireland (+0.5 million) and Italy (+0.4 million).
- > With 63.9 million homes – representing a market share of 52% amongst all digital homes – satellite remains the most important digital reception mode.
- > 19.7 million homes receive their TV signals via digital cable, 31.7 million via digital terrestrial reception and 6.8 million homes via DSL.

Digital TV market in 35 countries within the ASTRA group footprint

Digital homes in M.



TV over DSL/Optical fiber
 DTT
 Digital Cable
 DSTV

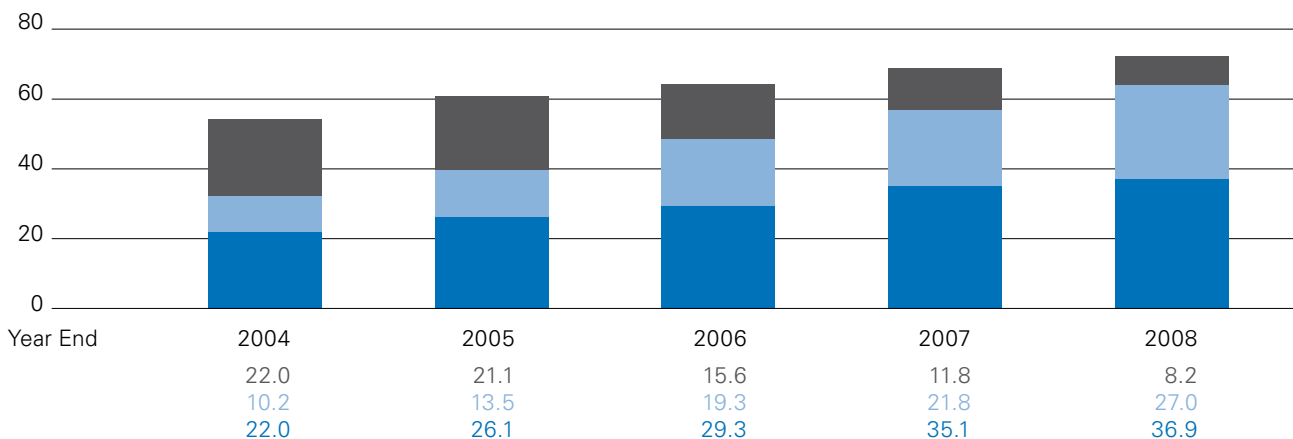
Source: SES ASTRA, Satellite Monitors

Almost 90% of all satellite homes are digital

- > Both free TV and pay TV are driving digital growth; digital channels are received in 27.0 million free TV homes and 36.9 million pay-TV homes.
 - The ASTRA group satellites currently carry almost 2,500 digital TV, radio and interactive channels.
- > The increase in digital free-to-air reception mainly comes from the German-speaking countries and Ukraine.
- > Analogue-only satellite reception continues to decrease, yet still reaches 8.2 million homes.

Digital and analogue satellite reception

DTH/SMATV homes in M.



Analogue only
 Digital Free
 Digital Pay

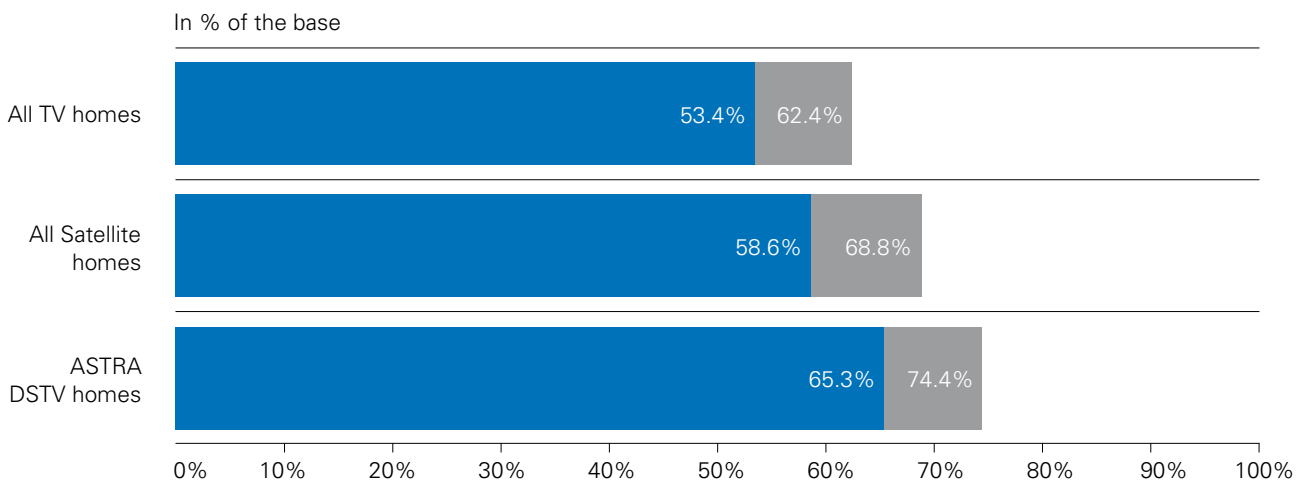
Source: SES ASTRA, Satellite Monitors

PC / Online Markets

ASTRA homes better equipped with PC and Internet access

- > In all ASTRA reception markets, PC and Internet penetration is higher among ASTRA digital homes than among average TV homes:
 - At year end 2008, 74.4% of ASTRA digital satellite homes own a PC, compared to 62.4% among average TV homes.
 - 65.3% of ASTRA digital satellite homes have an Internet access, compared to 53.4% among average TV homes.
- > ASTRA homes are better equipped with PC and Internet access, and therefore provide a solid foundation for the successful roll-out of broadband Internet services via satellite all over Europe.

PC - and Online-coverage in Europe within...



■ PC/Online
■ Total PC

Reading example: 62.4% of all TV homes in Europe own a PC and 53.4% have an Internet access
 Base: TV, Satellite and ASTRA DSTV homes in 35 European countries within the ASTRA group footprint
Source: SES ASTRA, Satellite Monitors, Year End 2008

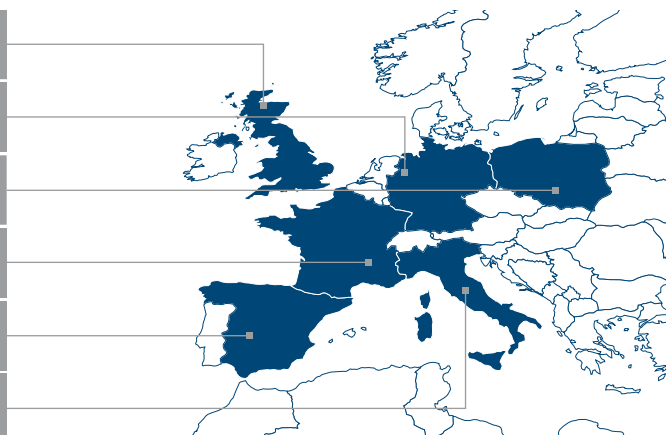
ASTRA Satellite Monitors

Independent research authorities confirm the quality of ASTRA Satellite Monitors

- > SES ASTRA has a dedicated market research team that undertakes comprehensive surveys and market analyses, which are shared with clients and business partners in Europe.
- > The Satellite Monitors, commissioned by SES ASTRA, continuously measure the development of the reception market for broadcast and broadband services in 35 countries within the ASTRA group footprint. At year end 2008, SES ASTRA conducted more than 65,000 interviews.
- > Carried out by leading market research institutes and using harmonized and acknowledged research methodologies, these surveys have been audited and awarded quality stamps by independent research authorities in France, Germany, Italy, Poland, Spain and the UK.
- > Providing quality information about the dynamic development in the TV reception markets within the ASTRA group footprint, the Monitors have set a benchmark for the whole satellite industry and are widely used by many entities, such as media authorities.

Quality stamps for the ASTRA Satellite Monitors

UK:	Institute of Practitioners in Advertising (IPA)
Germany:	Zentralverband der Deutschen Werbewirtschaft (ZAW)
Poland:	CESP & Polish Academy of Sciences
France:	Centre d'Etude des Supports de Publicité (CESP)
Spain:	CESP & Asociación para la Investigación de Medios de Comunicación (A.I.M.C.)
Italy:	CESP & statistical faculty of the University of Rome "La Sapienza"



ASTRA Satellite Monitors

Research Institutes

Algeria	TNS Maroc
Austria	GfK Austria
Belarus	NOVAK
Belgium	TNS Media
Bosnia	GfK BH
Bulgaria	GfK Bulgaria
Croatia	GfK Croatia
Czech Republic	GfK Praha
Denmark	TNS Gallup
Estonia	GfK CR Baltic
Finland	TNS Gallup
France	IPSOS Média
Germany	TNS Infratest
Greece	Focus Bari
Hungary	GfK Hungaria
Ireland	TNS MRBI
Italy	TNS Infratest
Latvia	GfK CR Baltic
Lithuania	GfK CR Baltic
Luxembourg	TNS ILReS
Morocco	TNS Maroc
Netherlands	TNS NIPO
Norway	TNS Gallup
Poland	GfK Polonia
Portugal	Instituto DYM
Romania	GfK Romania
Serbia	GfK Belgrade
Slovak Republic	GfK Slovakia
Slovenia	GfK Slovenia
Spain	Instituto DYM
Sweden	TNS Gallup
Switzerland	TNS Infratest
Tunisia	TNS Maroc
Ukraine	GfK Ukraine
UK	TNS UK

ASTRA group household coverage 2009

Markets in million	Universes				ASTRA group coverage		
	TV homes	DTH/SMATV & Cable	DTH/SMATV	Cable	DTH/SMATV & Cable	DTH/SMATV	Cable
					ASTRA at 19.2° east (total)		
Algeria	5.94	5.50	5.50	0.00	2.45	2.45	0.00
Austria	3.47	3.19	1.85	1.34	3.18	1.84	1.34
Belarus	3.83	2.11	0.26	1.85	0.17	0.08	0.10
Belgium	4.78	4.11	0.39	3.71	4.01	0.29	3.71
Bosnia	1.19	0.55	0.26	0.29	0.48	0.23	0.25
Bulgaria	2.88	1.99	0.37	1.62	1.18	0.08	1.10
Croatia	1.43	0.68	0.45	0.23	0.58	0.38	0.21
Czech Republic	4.21	1.93	0.90	1.03	1.03	0.44	0.60
Denmark	2.49	1.92	0.44	1.47	1.54	0.21	1.33
Estonia	0.57	0.40	0.08	0.32	0.21	0.03	0.18
Finland	2.19	1.09	0.12	0.97	0.28	0.04	0.24
France	24.36	8.19	5.90	2.28	6.83	4.55	2.28
Germany	37.67	34.65	16.20	18.45	34.46	16.00	18.45
Greece	3.49	0.41	0.41	0.00	0.17	0.17	0.00
Hungary	3.95	3.19	0.77	2.42	2.66	0.49	2.17
Ireland	1.46	1.02	0.68	0.35	0.03	0.03	0.00
Italy	23.45	7.37	7.37	0.00	1.85	1.85	0.00
Latvia	0.89	0.69	0.16	0.54	0.27	0.05	0.22
Lithuania	1.35	0.67	0.11	0.56	0.44	0.05	0.38
Luxembourg	0.17	0.17	0.05	0.12	0.16	0.04	0.12
Morocco	5.59	4.26	4.26	0.00	2.87	2.87	0.00
Netherlands	7.15	6.38	0.64	5.75	6.36	0.61	5.75
Norway	2.06	1.66	0.67	0.99	0.96	0.20	0.76
Poland	13.92	9.18	3.97	5.21	7.07	1.86	5.21
Portugal	3.73	1.80	0.53	1.27	1.25	0.15	1.09
Romania	6.98	6.55	1.38	5.16	1.73	0.22	1.51
Serbia	2.49	1.40	0.23	1.18	1.08	0.12	0.96
Slovak Republic	2.05	1.33	0.56	0.77	0.95	0.35	0.60
Slovenia	0.67	0.41	0.06	0.35	0.39	0.05	0.34
Spain	15.99	4.24	2.74	1.50	3.55	2.05	1.50
Sweden	4.28	2.93	0.83	2.10	0.74	0.19	0.55
Switzerland	2.94	2.73	0.49	2.24	2.67	0.43	2.24
Tunisia	2.13	1.75	1.75	0.00	1.40	1.40	0.00
Ukraine	17.79	7.80	2.35	5.45	1.72	0.66	1.06
United Kingdom	25.49	12.18	9.43	2.75	0.54	0.54	0.00
Total	243.02	144.40	72.14	72.27	95.25	41.01	54.24
					ASTRA at 28.2° east (total)		
Ireland					1.01	0.66	0.35
United Kingdom					12.17	9.42	2.75
Total					13.18	10.08	3.10
					ASTRA at 23.5° east (total)*		
Belgium					0.12	0.12	0.00
Czech Republic					1.49	0.46	1.03
Netherlands					0.31	0.31	0.00
Slovak Republic					0.94	0.16	0.77
Total					2.85	1.05	1.80
					SIRIUS at 5.0° east (total)		
Belarus, Bulgaria, Estonia, Latvia, Lithuania, Romania, Ukraine					15.20	2.77	12.43
Denmark, Finland, Norway, Sweden					5.99	1.11	4.89
Total					21.20	3.88	17.32
					ASTRA 19.2°, 28.2°, 23.5°E or SIRIUS 5.0°E		
Total ASTRA group reach (net) ASTRA 19.2°, 28.2°, 23.5°E OR SIRIUS 5.0°E, excluding homes receiving from two of these orbital positions at the same time (dual-feed)					122.20	53.41	68.79

Note: Cable represents private cable homes without satellite reception. Some numbers do not add-up due to roundings.

* Most of the 23.5°E homes also receive services from ASTRA at 19.2°E, notably using the Duo LNB.

KDG (Kabel Deutschland GmbH) uses the ASTRA Satellites at 23.5°E to feed cable networks in Germany.

Source: SES ASTRA, Satellite Monitors, Year End 2008

We believe there is always a new frontier. That's why we've spent nearly a quarter of a century investing in pioneering communications technology. But our biggest investment is in developing relationships. Whether that's with broadcasters, manufacturers or distributors, where we help to shape and define markets. Or whether it's with our technical partners, improving hardware and working on future innovations.

ASTRA is a business that is sustained by shared inspiration. And it is this that fuels our mission to deliver technologies that bring better communications to everyone, everywhere.

Why satellite?

Satellite means communications without limits. It means maximum bandwidth without the restraints on reach. Whatever your communication needs, satellite will reach more people everywhere.

Why ASTRA?

Reliability, service, technical expertise and innovation. We actively help everyone we work with, whether big or small. We offer technical help, marketing support and consultancy on wider industry matters and start-up ventures. Our long experience in helping clients, from the strategic, to the day-to-day, has helped us understand the true value of personal support.

Local presence

ASTRA is part of a global organization but our business is driven by local knowledge. We believe that each market is unique. That's why we have teams of people in local offices who work closely with our customers and fully understand their particular needs. We take our global expertise and bring it to your neighbourhood.

Africa – Johannesburg

Benelux – Hilversum

Central Eastern Europe – Warsaw

France – Paris

Germany – Munich

Great Britain – London

Italy – Rome

Poland – Warsaw

Spain – Madrid

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