



DVB-T2 in Austria

Opportunity for a better
TV experience

innovative broadcasting solutions

ors
comm

ORS – Austrian Broadcasting Services







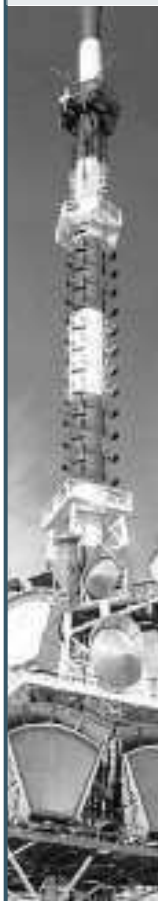
TERRESTRIK SATELLIT CONTENT VIA IP

SHAREHOLDER

	
60 %	40 %

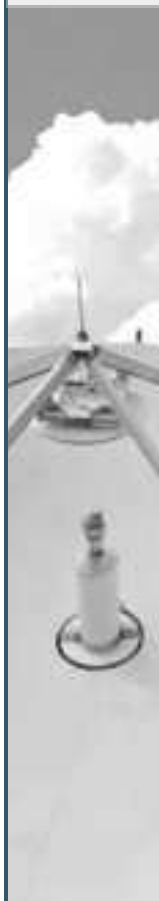
Our Service Portfolio & Technical Capabilities

Terrestrial



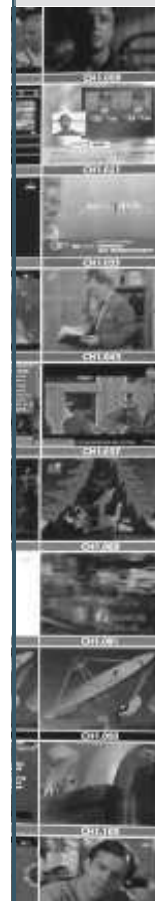
- DVB-T/T2
- FM/ Shortwave/ DAB+
- LTE
- Microwave links
- Hybrid TV
- HD and 3D
- Encryption
- Maintenance/ Operation
- Consulting/ Network Planning

Satellite



- DVB-S/S2
- Signal distribution
- Catch-up-TV
- Hybrid TV
- HD and 3D
- Encryption
- Maintenance & Operation

Cable & IPTV



- IPTV
- Cable Distribution
- Video on Demand
- Catch-up-TV
- Hybrid TV
- HD and 3D
- Encryption
- Maintenance/ Operation

Facts and figures

- Carve out of ORF's transmission branch in 2005
- Partly privatized; shareholders are **ORF (60%)** and **Medicur (40%)**
- Provides terrestrial as well as satellite services for all major broadcasters in Austria
- 2 nationwide MUX-Licenses with 323 DVB-T transmitter sites
- 125 employees all over Austria
- Turnover 73,5 Mio Euro (2011)

Television

473 Broadcasting stations
986 Broadcasting units



Radio

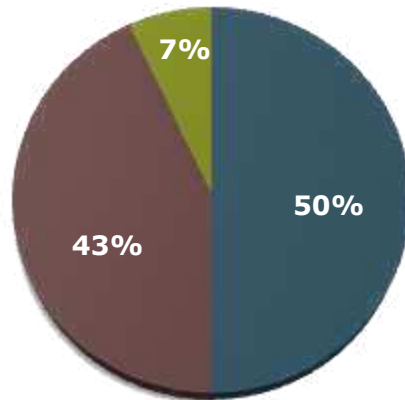
262 Broadcasting stations
865 Broadcasting units

DVB-T2 is tomorrow's terrestrial broadcasting solution



Shrinking market share of terrestrial TV

■ Satellite ■ Cable ■ Terrestrial



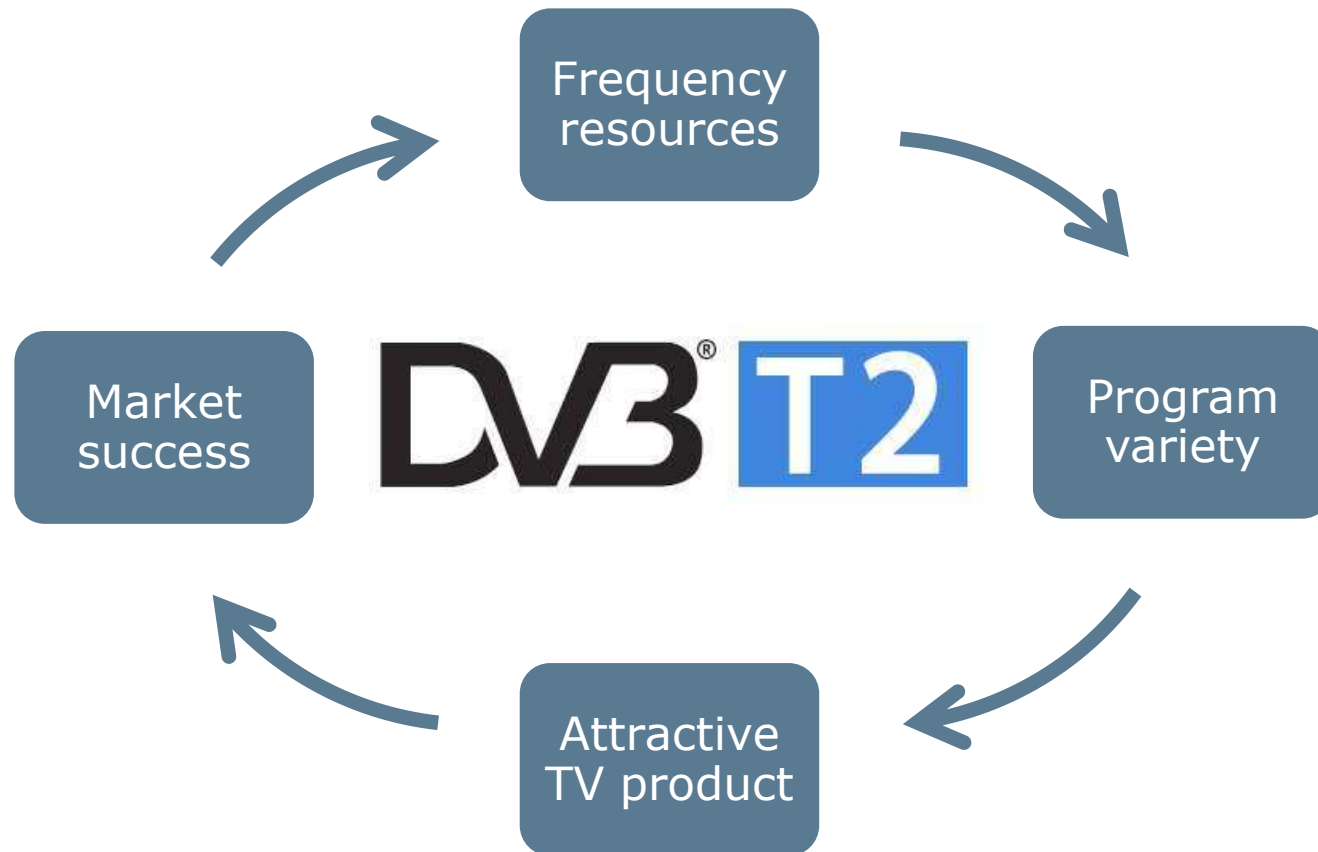
Weakness: Only 8 available channels!

- DVB-T2 outperforms its predecessor in higher frequency efficiency
- New compression technologies such as MPEG4 AVC allow for additional capacity

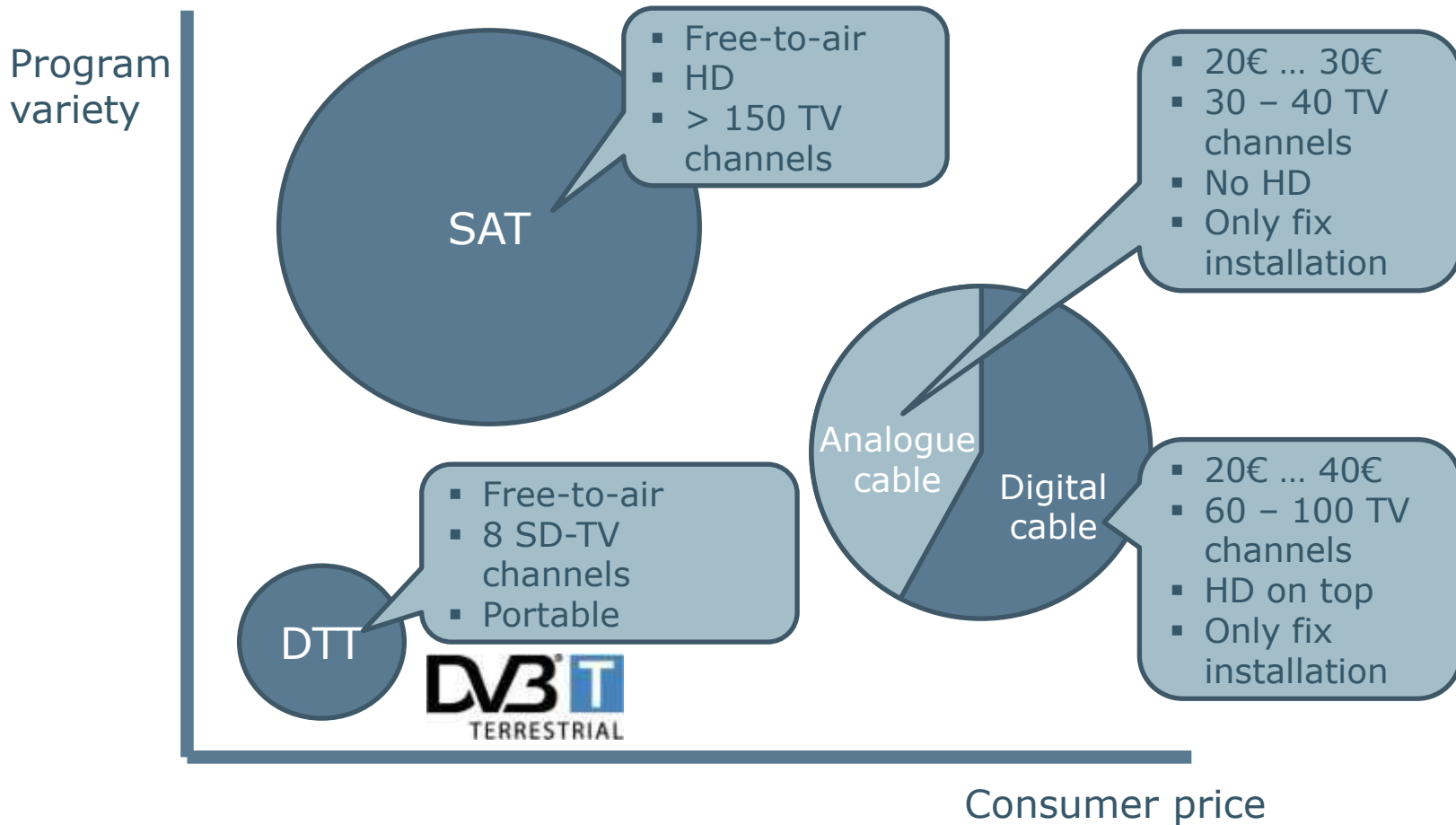
This means:

- On additional frequencies we can offer new multiplexes HD-TV & multitude of additional SD-TV programs
- Exploit frequency potential available after analogue turnoff
- The market potential for 2015 increases significantly

Terrestrial TV in Austria – dependencies

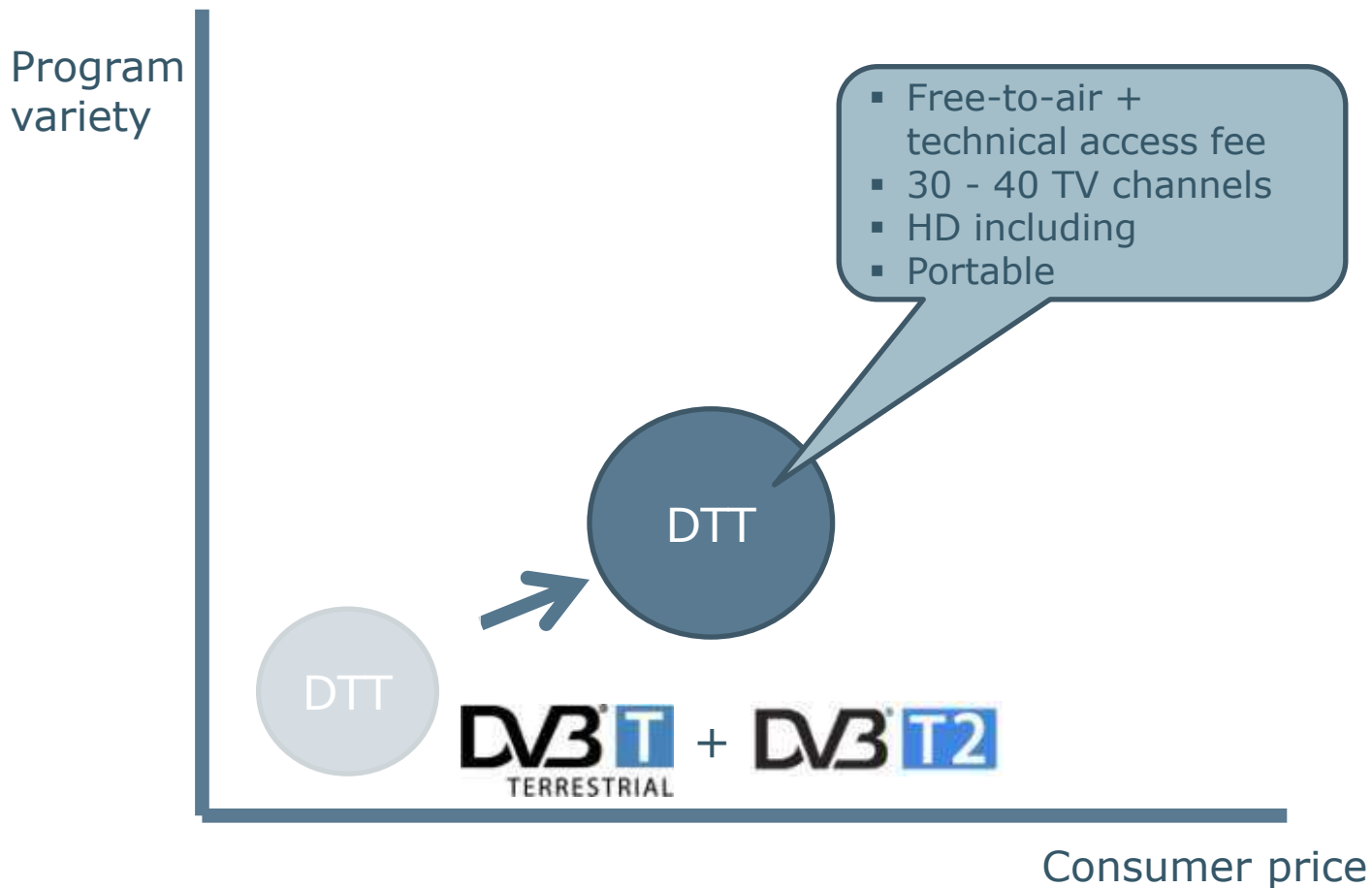


TV platforms in Austria 2012



TV platforms in Austria 2013 ... 2015

Repositioning of terrestrial TV in Austria



Scheme of improvements for DTT

Improvement of signal quality

- Additional transmitter sites
- Bundles of antenna and STB (set top box) or idTV (integrated digital TV) to ensure best quality of reception equipment
- Focus on urban areas

Improvement of usability

- Certification of set top boxes (STB) and idTVs
- Logical channel numbering (LCN 2.0 virtuell channels)

Improvement of customer care

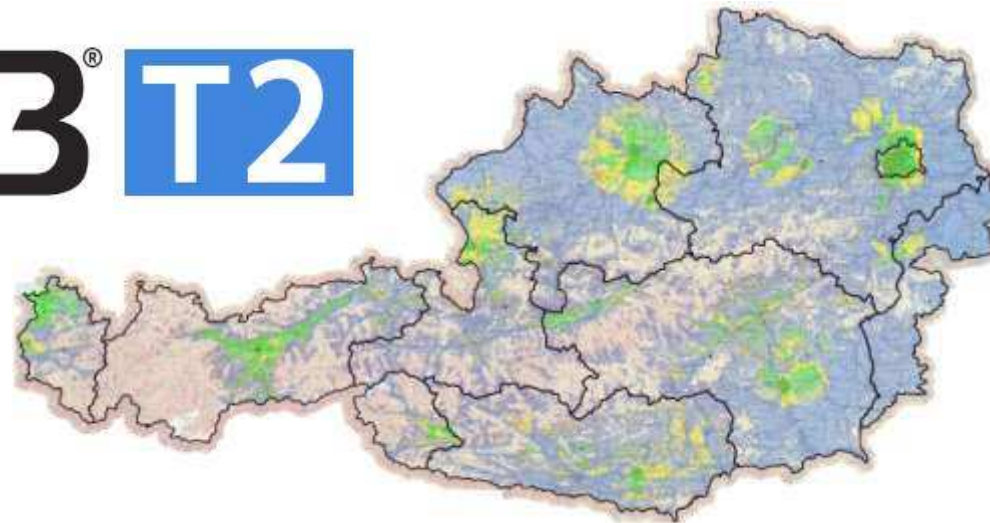
- Installation support (if needed)

Coverage

Target: indoor coverage

	fixed	mobile	portable indoor
Austria	7,2Mio	3,7Mio	2,74Mio
	90,60%	46,00%	34,20%

DVB[®] T2



DVB-T2 improves terrestrial TV in Austria

PRODUCT DESIGN

- Significant improvement of reception / signal quality, especially in urban areas
- Upgrade of content variety: 30-40 channels available
- HD channels become integral part of channel portfolio

TARGETING THE MARKET

- Customized bundle offers for consumers depending on actual household equipment

ROLLOUT

- Launch planned for 1st half 2013



Thank you for your attention!

Some questions?