A detailed assessment of strategic trends in one of the most promising but competitive satellite markets.

- Nearly 100 pages
- Over 120 graphs & tables
- Thousands of data points
- Comprehensive PDF & Excel digital files
- Price starting at € 4,500

Overall usage for satellite capacity in Sub-Saharan Africa increased at an 11% CAGR over 2009-2014 despite the spread of terrestrial fiber networks and the decrease of international trunking. Euroconsult further anticipates an 11% CAGR for capacity leased over the next decade, for a total of close to 200 Gbps of traffic flowing over satellite.

Multiple drivers support a strong future increase in the use of satellite communication services, including:

- Digital TV growth is still only in its early phase; the transition process to digital terrestrial television has just begun. In parallel, satellite pay-TV, despite the signing of more than 10 million subscribers in the last ten years, is only beginning to penetrate the market.
- Mobile penetration keeps increasing along with universal access requirements, while 3G and potentially 4G expansion will create new connectivity requirements.
- A variety of segments, such as oil & gas, banking, mining, and government networks will require more connectivity as operations either diversify or expand geographically.
- A number of new enterprise hot spot markets are evolving particularly in East and West Africa in addition to the historically strong VSAT markets like South Africa, Nigeria, Angola, Kenya and Tanzania. This should contribute to overall market growth across Sub-Saharan Africa.
- Broadband access for consumers and enterprises offers new opportunities on the back of new HTS capacities and services. Also, the usage of HTS capacity for trunking should increase for landlocked countries like DR Congo and South Sudan at least in the short to medium term as fiber availability remains limited and unreliable.

For operators, the ability to create new differentiators will be key in a context of large capacity supply, which includes the development of video neighborhoods, of selected service platforms and the co-development of projects with local service providers and end-users. For service and equipment providers, the rollout of more sophisticated solutions and a potential consolidation of service providers should contribute to market growth. The emergence of new free-to-air and pay-TV platforms should also shape the future African TV market.
HIGHLIGHTS OF THE REPORT:

The strategic review is a detailed assessment of strategic trends in Africa’s competitive satellite market. It includes a review of the complete value chain, from service development and equipment rollout in eight key vertical segments to the supply and use of satellite capacity. In addition to regional trends within four sub-regions, the report includes 10 profiles of key national markets in Sub-Saharan Africa.

VERTICAL SEGMENTS

• Trunking/Backhaul
• Government Networks
• International Organizations & NGOs
• Oil & Gas
• Mining
• Banking
• Broadband Access
• Broadcasting Services

COUNTRY PROFILES

• South Africa
• Namibia
• Nigeria
• Democratic Republic of Congo
• Ethiopia
• South Sudan
• Kenya
• Senegal
• Angola
• Ivory Coast

METHODOLOGY

The analysis, data and estimates for this report relied on two complementary approaches:

• Primary research involving interviews with over 35 stakeholders operating in the Sub-Saharan Africa region
• Secondary research involving a broad review of public information, including reports from government organizations, press releases, articles and other sources, some of which are listed at the end of the report.

THE FOUR REGIONS CONSIDERED IN THE AFSAT REPORT
EXECUTIVE SUMMARY

01\ DEVELOPMENT DYNAMICS IN AFRICAN COUNTRIES
  > DIVERSE GEOGRAPHIES AND WEATHER CONDITIONS
  > POWERFUL DEMOGRAPHICS IN MOST COUNTRIES
  > CONTINUOUS BUT UNSTABLE ECONOMIC GROWTH
  > OVERVIEW OF POLITICAL REGIME AND SECURITY STATUS

02\ DRIVERS AND FORECASTS FOR KEY MARKET VERTICALS
  > OVERVIEW OF THE COMMUNICATION MARKET IN SSA
  > COVERAGE OF COMMUNICATION NETWORKS IN SSA
  > MOBILE SUBSCRIPTIONS – PUSHING THE LIMITS
  > EMERGING INTERNET/BROADBAND ACCESS
  > MNOS - COMPETITION, INVESTMENT & CONSOLIDATION
  > VSATS IN SERVICE AND SHIPMENTS
  > SATELLITE CAPACITY SUPPLY AND DEMAND
  > OVERVIEW OF THE SATCOM SERVICE MARKET
  > SATCOM VERTICAL – CELL BACKHAUL AND TRUNKING
  > SATCOM VERTICAL – GOVERNMENT SERVICES
  > SATCOM VERTICAL – INTERNATIONAL ORGANISATIONS AND NGOS
  > SATCOM VERTICAL – OIL & GAS
  > SATCOM VERTICAL – MINING
  > SATCOM VERTICAL – BANKING
  > SATCOM VERTICAL – BROADBAND ACCESS
  > SATCOM VERTICAL – TELEVISION

03\ PROSPECTS FOR CAPACITY AND USAGE
  > CAPACITY SUPPLY IN AFRICA STILL ON THE RISE
  > DIVERSIFIED SUPPLY
  > CAPACITY DEMAND – overview
  > CAPACITY DEMAND DYNAMICS
    - WESTERN AFRICA
    - CENTRAL AFRICA
    - EASTERN AFRICA
    - SOUTHERN AFRICA
  > FILL RATES AND CAPACITY PRICING
04\ COUNTRY FOCUSES

NIGERIA
DEMOCRATIC REPUBLIC OF CONGO
ANGOLA
SOUTH AFRICA
NAMIBIA

ETHIOPIA
KENYA
SOUTH SUDAN
IVORY COAST
SENEGAL
01 DEVELOPMENT DYNAMICS IN AFRICAN COUNTRIES

DIVERSE GEOGRAPHIES AND WEATHER CONDITIONS:
- TOTAL POPULATION (MILLION) & RURAL POPULATION OF TOTAL POPULATION (%) IN 2013

POWERFUL DEMOGRAPHICS IN MOST COUNTRIES

CONTINUOUS BUT UNSTABLE ECONOMIC GROWTH
- GDP PER CAPITA, PPP, 2003 & 2013 (COVERING WESTERN, CENTRAL, EASTERN & SOUTHERN AFRICA)

OVERVIEW OF POLITICAL REGIME AND SECURITY STATUS:
- REFUGEE HOSTING COUNTRIES MAPPING (2013)

02 DRIVERS AND FORECASTS FOR KEY MARKET VERTICALS

OVERVIEW OF THE COMMUNICATION MARKET IN SSA

COVERAGE OF COMMUNICATION NETWORKS IN SSA
- MOBILE COVERAGE BY SUBREGION IN TERRITORY AND POPULATION
- SHARE OF COUNTRIES WITH AT LEAST ONE 3G NETWORK IN SERVICE
- ESTIMATED MOBILE BASE STATIONS BY SUBREGION (‘000)

MOBILE SUBSCRIPTIONS – PUSHING THE LIMITS
(COVERING WESTERN, CENTRAL, EASTERN & SOUTHERN AFRICA)

EMERGING INTERNET/BROADBAND ACCESS
(COVERING WESTERN, CENTRAL, EASTERN & SOUTHERN AFRICA)

MNOS - COMPETITION, INVESTMENT & CONSOLIDATION
- NUMBER OF OPERATORS BY SUBREGION
- LEADING MNOS: SUBSCRIBERS AND COUNTRY PRESENCE
- LEADING MNOS: MONTHLY MOBILE ARPU

VSATS IN SERVICE AND SHIPMENTS
- ESTIMATED VSATS IN SERVICE BY SUB REGION
- ESTIMATED VSATS IN SERVICE BY VERTICAL MARKET
- ESTIMATED VSATS IN SERVICE BY TYPE OF CAPACITY

SATCOM SERVICES
- ESTIMATED SERVICE REVENUES BY SUB REGION
- ESTIMATED BREAKDOWN OF REVENUES BY MARKET VERTICAL
- KEY REGIONAL SERVICE PROVIDERS (PRESENCE, NB OF MARKET VERTICALS)

FOCUS– CELL BACKHAUL AND TRUNKING – THE STAKES

CELL BACKHAUL AND TRUNKING – SATCOM SERVICES
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- IP AND VOICE TRUNKING TRAFFIC BY TYPE
- RECENT SATELLITE CAPACITY AND SERVICE CONTRACTS

CELL BACKHAUL AND TRUNKING–DRIVERS & FORECASTS
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- CAPACITY-USAGE BY SUB REGION AND REVENUES-CELL BACKHAUL & TRUNKING
- ANNUAL SERVICE REVENUES BY SUB REGION-CELL BACKHAUL

FOCUS – GOVERNMENT SERVICES– THE STAKES

GOVERNMENT– SATCOM SERVICES
- ESTIMATED NUMBER OF SITES BY SUB REGION
- USAGE PATTERNS OF SITES
- RECENT SATELLITE CAPACITY AND SERVICE CONTRACTS

GOVERNMENT SERVICES-DRIVERS AND FORECASTS
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS– INTERNATIONAL ORGANISATIONS AND NGOS – THE STAKES AND SATCOM SERVICES

INTERNATIONAL ORGANISATIONS AND NGOS – DRIVERS AND FORECASTS
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS – OIL & GAS – THE STAKES

OIL & GAS – SATCOM SERVICES
- ESTIMATED NUMBER OF SITES BY SUB REGION
- USAGE PATTERNS OF SITES
- RECENT SATELLITE CAPACITY AND SERVICE CONTRACTS

OIL & GAS – DRIVERS & FORECASTS
- ESTIMATED NUMBER OF SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS– MINING – THE STAKES AND SATCOM SERVICES

MINING – DRIVERS AND FORECASTS
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS – BANKING – THE STAKES

BANKING – SATCOM SERVICES
- ESTIMATED NUMBER OF SITES BY SUB REGION
- USAGE PATTERNS OF SITES
- RECENT SATELLITE CAPACITY AND SERVICE CONTRACTS

BANKING – DRIVERS & FORECASTS
- ESTIMATED NUMBER OF SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS – BROADBAND ACCESS – THE STAKES

BROADBAND ACCESS – SATCOM SERVICES
- ESTIMATED NUMBER OF SITES BY SUB REGION
- ISP BROADBAND SERVICE BY TYPE- NIGERIA
- CONSUMER BROADBAND PACKAGES
02. DRIVERS AND FORECASTS FOR KEY MARKET VERTICALS

CONTINUED...

BROADBAND ACCESS – DRIVERS AND FORECASTS
- ESTIMATED NUMBER OF BTS SITES BY SUB REGION
- ESTIMATED NUMBER OF SITES BY TYPE
- CAPACITY-USAGE BY SUB REGION AND REVENUES
- ANNUAL SERVICE REVENUES BY SUB REGION

FOCUS – TELEVISION – OVERVIEW

TELEVISION – EVOLUTION OF TV ECOSYSTEM
- AVERAGE NUMBER OF TV SIGNALS AND CAPACITY USAGE FOR SATELLITE PAY-TV IN AFRICA
- ZUKU: EVOLUTION OF TV SIGNALS DISTRIBUTED AND CAPACITY USAGE
- STARTIMES TV: EVOLUTION OF TV SIGNALS DISTRIBUTED AND CAPACITY USAGE
- BENCHMARK OF AFRICAN FREE-TO-AIR SATELLITE AND DTT SERVICES (1Q2015)

TELEVISION – DRIVERS & FORECASTS
- TV HOUSEHOLDS BY SUB REGION
- PAY-TV SUBSCRIBERS BY SUB REGION
- PAY-TV SUBSCRIBERS BY DELIVERY NETWORK
- SATELLITE PAY-TV SUBSCRIBERS BY COUNTRY

03. PROSPECTS FOR CAPACITY AND USAGE

CAPACITY SUPPLY IN AFRICA STILL ON THE RISE

DIVERSIFIED SUPPLY
- REGULAR CAPACITY SUPPLY BY SUB REGION
- HTS CAPACITY SUPPLY BY SUB REGION
- ESTIMATE OF TOTAL CAPACITY SUPPLY BY SUBREGION

CAPACITY DEMAND – OVERVIEW
- CAPACITY DEMAND BY SUBREGION
  REGULAR CAP. IN TPES, HTS TRAFFIC IN GBPS, CONSOLIDATED (MHZ EQ.)
- CAPACITY DEMAND BY APPLICATION SEGMENT
  REGULAR CAP. IN TPES, HTS TRAFFIC IN GBPS, CONSOLIDATED (MHZ EQ.)
- CAPACITY USAGE FOR VSAT VERTICAL SEGMENTS (EXC. BROADBAND ACCESS AND BACKHAUL/TRUNKING)
  REGULAR CAP. IN TPES, HTS TRAFFIC IN GBPS, CONSOLIDATED (MHZ EQ.)
- HTS TRAFFIC FOR BROADBAND ACCESS IN GBPS

CAPACITY DEMAND DYNAMICS:
- WESTERN AFRICA
- CENTRAL AFRICA
- EASTERN AFRICA
- SOUTHERN AFRICA

FILL RATES AND CAPACITY PRICING
- REGULAR CAPACITY AND DEMAND (TPES, 2014)
- REGULAR CAPACITY FILL RATE IN SSA
- ANTICIPATED TREND FOR CAPACITY PRICING IN SUB-SAHARAN AFRICA ($/MHZ/MONTH)
04\ COUNTRY PROFILES

NIGERIA
- MOST POPULATED COUNTRY IN SSA
- VSAT SERVICES IN TRANSITION PHASE

DRC
- IMPROVED DEVELOPMENT RATE
- MODERNIZATION OF TELECOM INFRASTRUCTURE
- STRONG POTENTIAL OF VSATS FOR B2B SERVICES

ANGOLA
- ECONOMIC GROWTH VS. PUBLIC BENEFIT
- UPGRAADING & EXPANDING BROADBAND
- PREMIUM VSAT MARKET

SOUTH AFRICA
- FACING ECONOMIC SLOWDOWN
- EXTENSIVE BACKBONE CONNECTIVITY
- SUSTAINED GROWTH IN VSAT ROLLOUT

NAMIBIA
- CHALLENGES TO ECONOMIC GROWTH
- VSAT SERVICES

ETHIOPIA
- RURAL AREAS AS STRONG PRIORITY
- STILL LOW MOBILE PENETRATION
- SOLID POTENTIAL FOR SATELLITE SERVICES

KENYA
- NEW CHALLENGES TO ECONOMIC GROWTH
- STRONG COMPETITION AND FIBER NETWORK
- BROADBAND AS NEW DRIVER FOR SATELLITE

SOUTH SUDAN
- MOST RECENT COUNTRY IN SSA
- MOBILE PENETRATION STILL LIMITED

IVORY COAST
- ROBUST ECONOMIC GROWTH
- NEW FIBER & BROADBAND INITIATIVES
- SEVERAL SEGMENTS FOR VSAT GROWTH

SENEGAL
- ECONOMIC REMAINS BELOW SSA AVERAGE
- SUSTAINED BROADBAND GROWTH
- ROBUST VSAT CONNECTIVITY MARKET

EACH REGION PROVIDES GRAPHS FOR:
- POPULATION GROWTH 2009 - 2020
- GDP : TOTAL VS. PER CAPITA
- LOCAL ECONOMY: TOP 3 SECTORS
- BROADBAND ACCESS AS OFFICIAL PRIORITY
- NETWORK COVERAGE: 3G VS. OPTICAL FIBER
- MOBILE PERFORMANCE 2009-2019
- ESTIMATED NUMBER OF SITES BY SEGMENT
- ESTIMATED NUMBER OF SITES BY TYPE
- SERVICE REVENUES BY SEGMENT

OIL & GAS – DRIVERS & FORECASTS

FOCUS – GOVERNMENT SERVICES – THE STAKES

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