BROCHURE

PROSPECTS FOR SATELLITE COMMUNICATIONS & BROADCASTING IN AFRICA

2015 Edition | A Euroconsult **Strategic Review**

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
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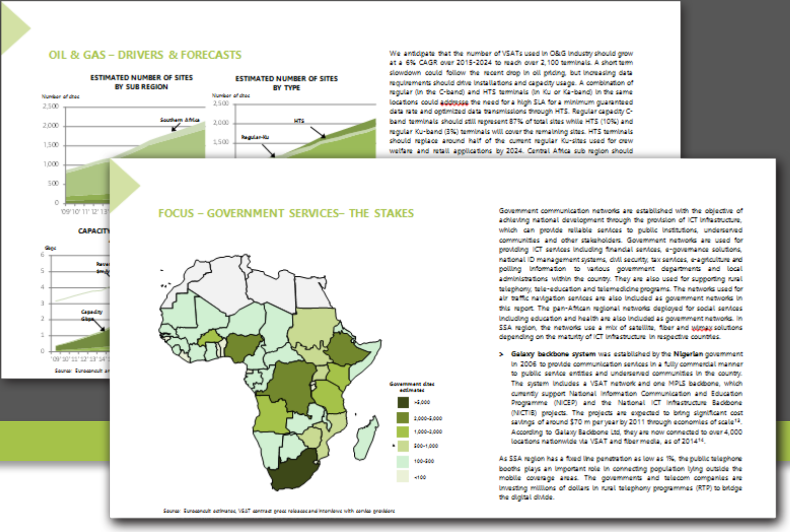
✓ Price starting at € 4,500

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.



ABOUT PROSPECTS FOR SATELLITE COMMUNICATIONS & BROADCASTING IN AFRICA 2015

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

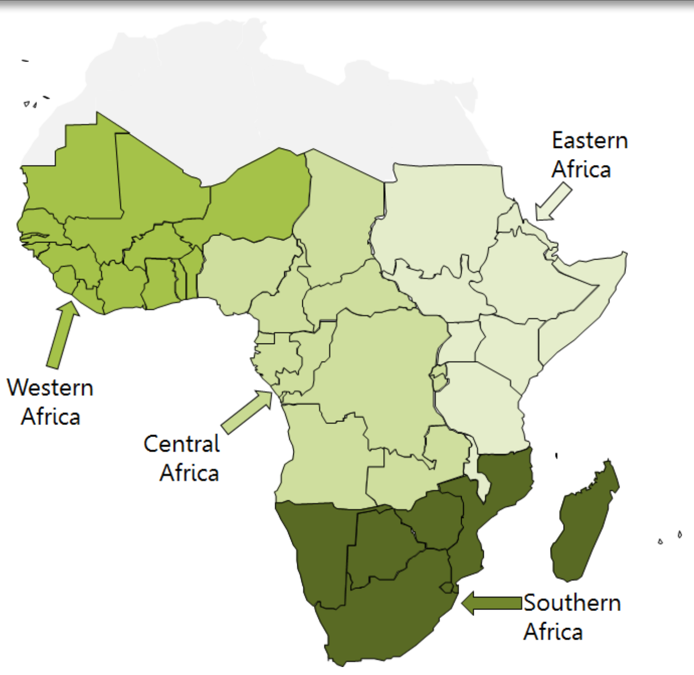
- South Africa
- Namibia
- Nigeria
- Democratic Republic of Congo
- Ethiopia
- South Sudan
- Kenya
- Senegal
- Angola
- Ivory Coast

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



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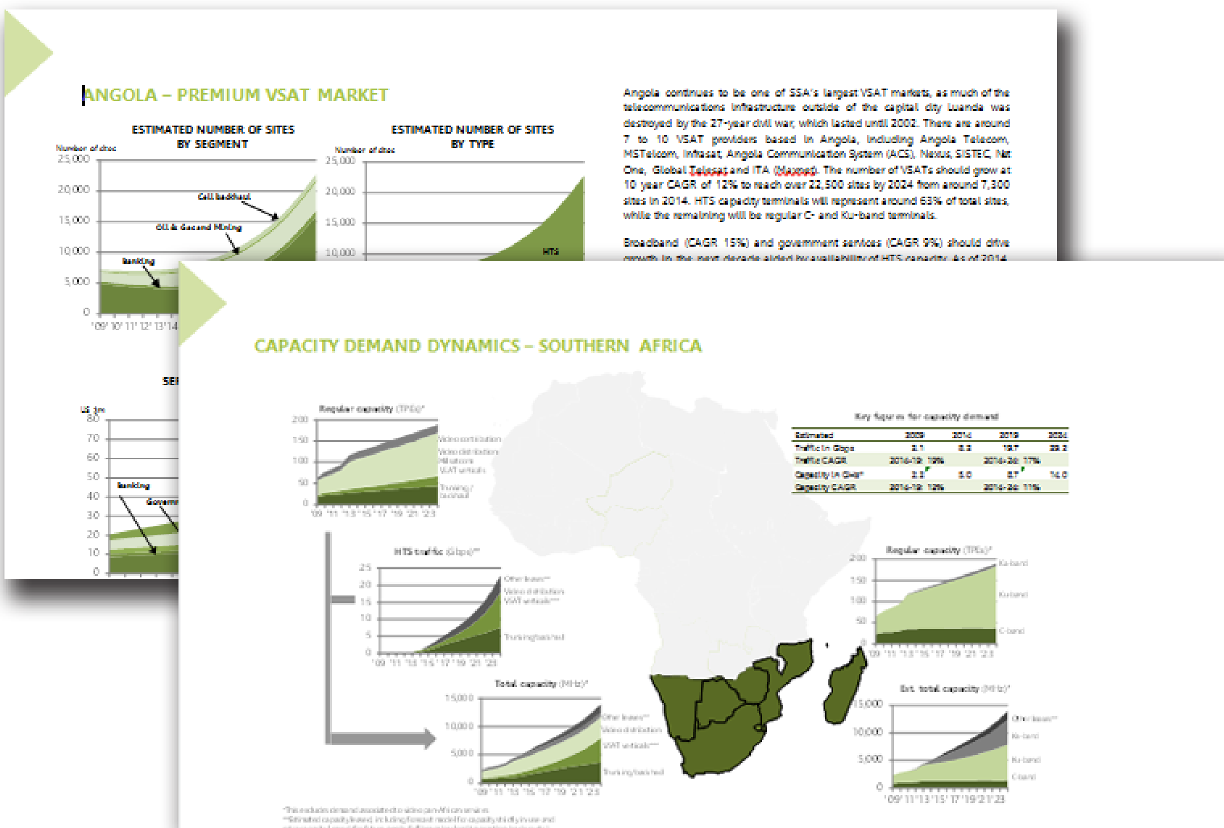

01\ DEVELOPMENT DYNAMICS IN AFRICAN COUNTRIES

DIVERSE GEOGRAPHIES AND WEATHER CONDITIONS:

POWERFUL DEMOGRAPHICS IN MOST COUNTRIES
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- SUB REGION POPULATION (MILLION) (2005, 2010, 2015, 2020) - WESTERN, CENTRAL, EASTERN & SOUTHERN AFRICA BREAKDOWN

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- EASTERN AFRICA
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04\ COUNTRY PROFILES

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- ❑ VSAT SERVICES IN TRANSITION PHASE

DRC
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SENEGAL
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- ❑ SUSTAINED BROADBAND GROWTH
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EACH REGION PROVIDES GRAPHS FOR:

- ❑ POPULATION GROWTH 2009 - 2020
- ❑ GDP : TOTAL VS. PER CAPITA
- ❑ LOCAL ECONOMY: TOP 3 SECTORS
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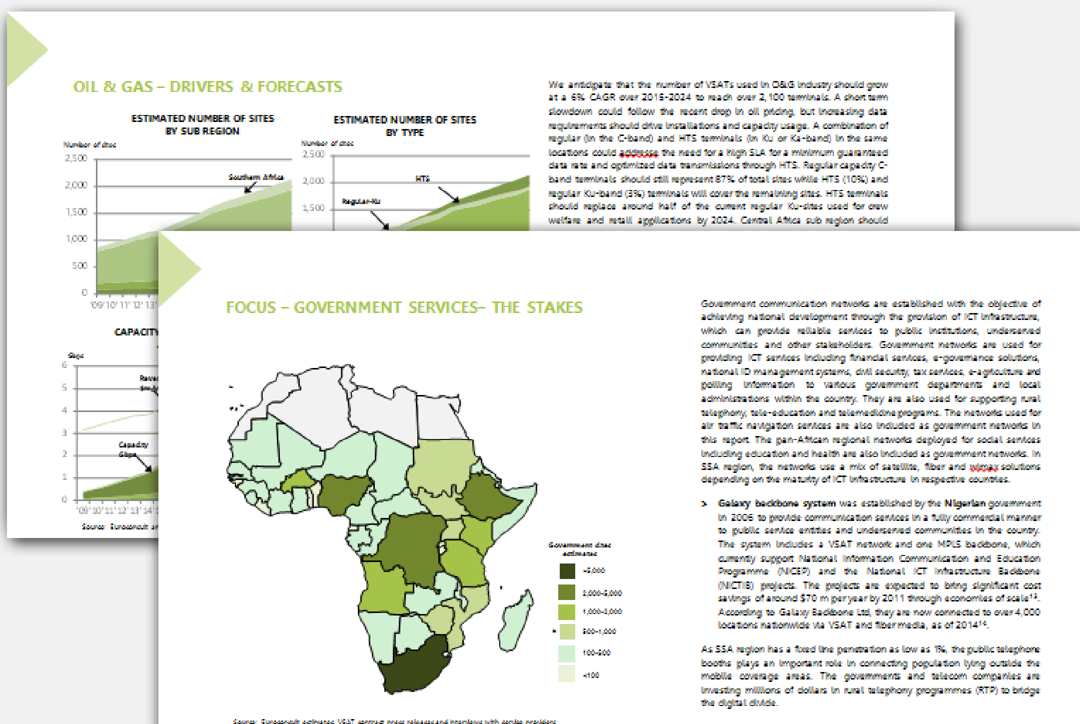
- ❑ NETWORK COVERAGE: 3G VS. OPTICAL FIBER
- ❑ MOBILE PERFORMANCE 2009-2019
- ❑ ESTIMATED NUMBER OF SITES BY SEGMENT
- ❑ ESTIMATED NUMBER OF SITES BY TYPE
- ❑ SERVICE REVENUES BY SEGMENT



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