



*Nilesat*



NILESAT & AFRICA

Common Interests and Potential Growth

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# Who are We?

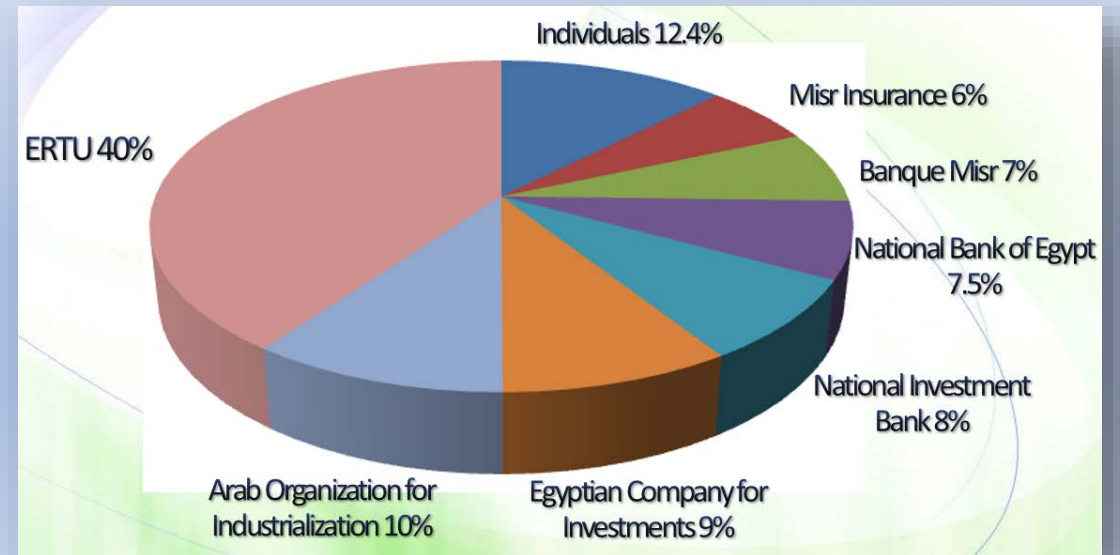
## The Egyptian Satellite Company - NILESAT

- A joint-stock company operating under the Free Zone Law in 6th of October City.
- Established in 1996 to operate Egyptian satellites, associated ground stations.
- Covers the whole MENA region, providing DTH Broadcasting services.
- Nilesat viewership: More than 60 million points (Closest competitor: 20 million points).
- More than 700 TV Channels, more than 200 Radio Channels.

## Our Goals:

- Retain existing customers
- Resuming the turn-over customers
- Acquiring new customers
- Find new markets/services for future capacity

### - Shareholders -



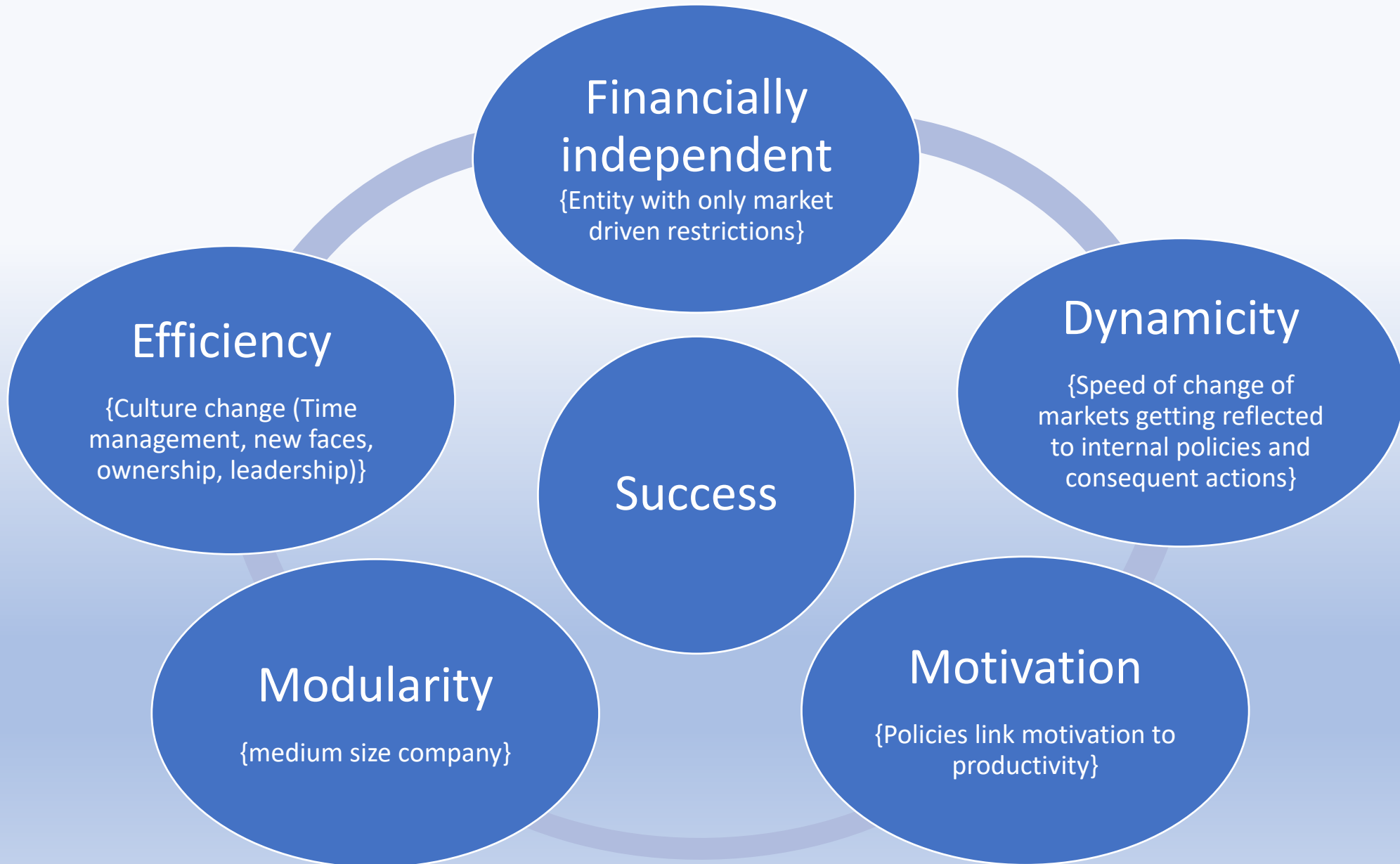
# The Nilesat Fleet @ 7°W



# Fleet Coverage over Africa

Satellite	Operational Lifetime	African Coverage (Outside MENA)
<b>N101</b>	June 1998 up to 2013	<b>Extended coverage:</b> South of Soudan, Eritrea, Chad, Niger, Mali, Gambia, Somalia.
<b>N102</b>	August 2000 up to 2018 (3 additional years in inclined orbit)	
<b>N201</b>	September 2010 for expected 16 years operational life time.	<b>Extended coverage:</b> South of Soudan, Eritrea, Chad, Niger, Mali, Gambia, Somalia, Ethiopia, Central Africa, Nigeria, Democratic Congo, Togo, Ghana, Ivory Cost.
<b>N301</b>	April 2022 for expected 16 years operational life time.	<ul style="list-style-type: none"> <li>- <b>Dedicated Coverage Over MENA:</b> South of Soudan, Eritrea, Chad, Mali, Gambia, Somalia.</li> <li>- <b>Dedicated Coverage Over NB:</b> South of Soudan, Ethiopia, Gepoty, Uganda, Kenia, Rwanda, Burundi, Tanzania, and Democratic Congo.</li> <li>- <b>Dedicated Coverage Over SPOA:</b> South Africa, Swaziland, Lesotho, Batswana, Namibia, Angola, Zambia, Zimbapowy, Mozambique.</li> </ul>

# Five factors towards Success



# Current Role of Media

❑ The media plays a role in: **Information, Education, and Entertainment.**

❑ A nice **quotation**;

“By making one part of a country aware of other parts, their people, arts, customs, and politics; by permitting the national leaders to talk to the people, and people to the leaders and to each other; by making possible a nation-wide dialogue on national policy; by keeping the national goals and national accomplishments always before the public--thus modern communication, widely used, can help weld together isolated communities, disparate subcultures, self-centered individuals and groups, and separate developments into a truly national development.”

“Father of Communication Studies”, Wilbur Schramm

# Cont.

□ The CORONA virus pandemic causes changes in behaviour that affect both the business model and the operating model of media and advertising companies. The impacts of Covid on the media are, therefore, multiple.

- A renewed interest in linear television. While the “small window” was thought to be irretrievably losing momentum, the time spent in front of the TV has never been so high. The statistics lead to an **average increase of 10% in the time spent in front of the television.**
- **TV audiences have increased dramatically** due to the need for information, and with the help of confinement, it was indeed necessary to keep busy, and audiences for entertainment logically increased.
- Confinement and social distancing measures have led to the emergence of **new television formats.** The drastic reduction of live broadcasts, in particular, has led to the integration of consumer technologies (zoom, face-time) into programmes created under new conditions.

# NILESAT- African Market

- ❑ Africa is the world's second-largest and second-most populous continent, after Asia in both cases. With 1.3 billion people over 54 states on 30.3 million km<sup>2</sup>, it covers 20% of Earth land area, and accounts for about 16% of the world's human population.
- ❑ Despite this low concentration of wealth, recent economic expansion and the significantly large and young population make Africa an important economic market in the broader global context.
- ❑ Since the dawn of history, Egypt was always Africa's gate to Asia, Europe and North and South America and has active relations with various African Kingdoms and countries that contributed in developing a strong commercial and political ties with its African depth.





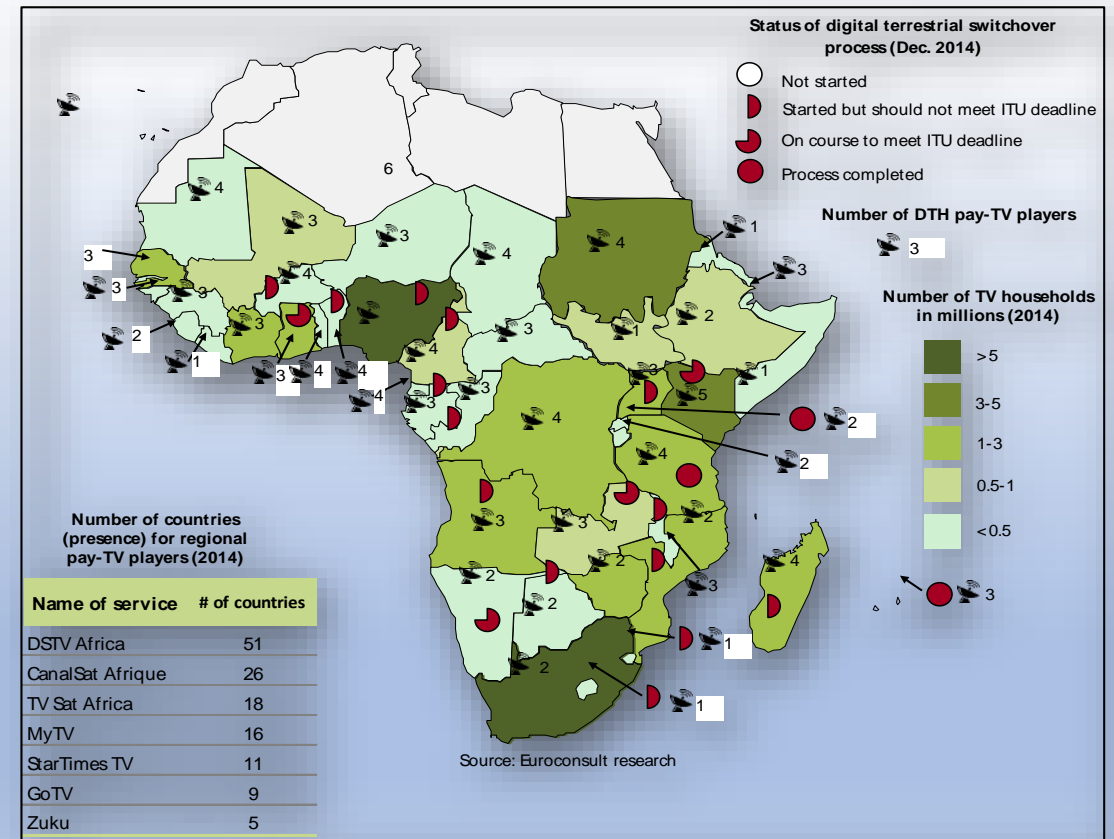
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❑ Africa boasts up to 600 TV stations, with the satellite TV market within the SSA region only has observed strong growth in the last few years. The number of households with TVs reached an estimated 75 million in 2021, with the economic development supported that trend.

❑ DTH and Distribution market has a stronghold in the Middle East, North Africa and Sub-Saharan Africa. There are more than 10 DTH service providers in this region. OSN, DSTV Africa, Noorsat, Beln, and IRIB are some of the well-known satellite content providers.

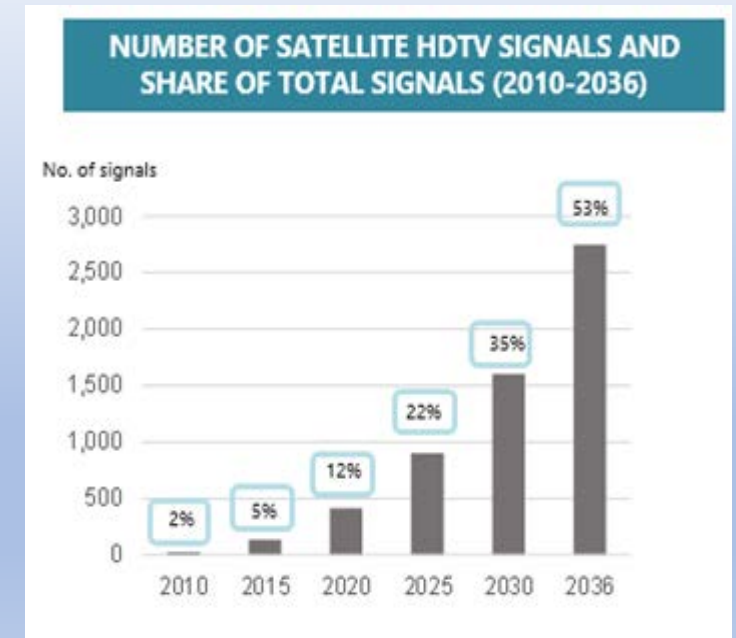
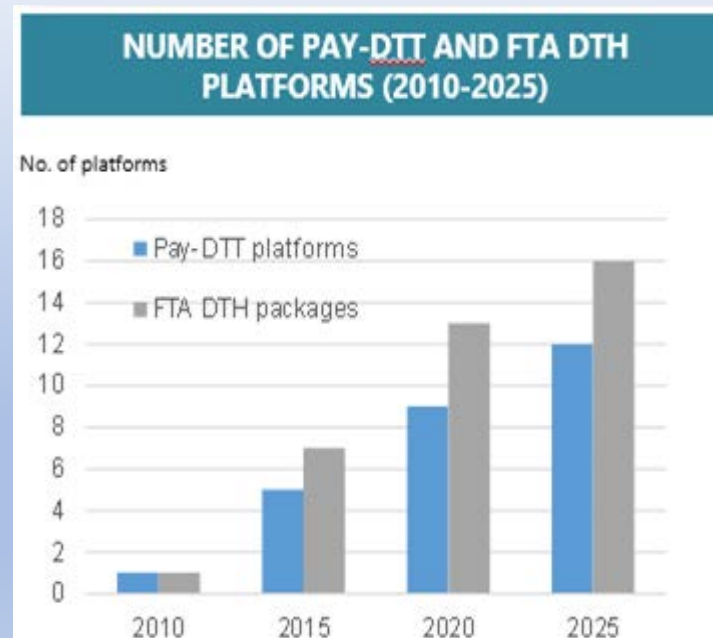
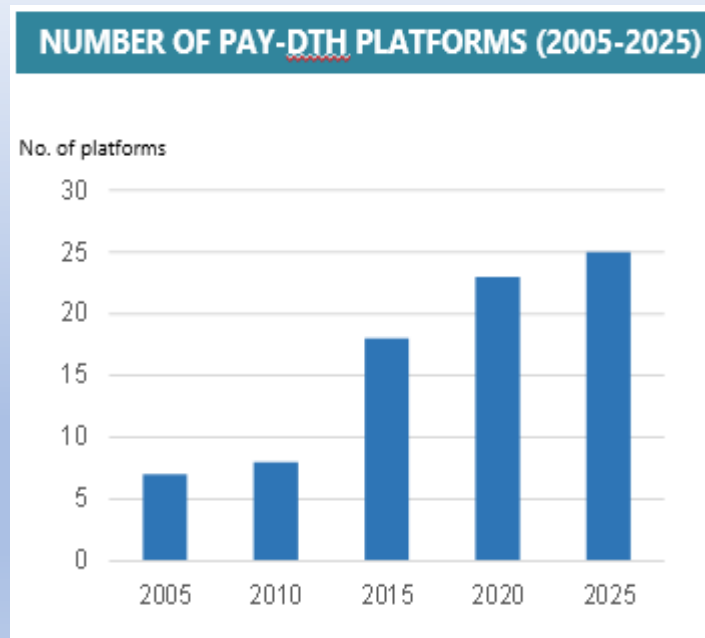
❑ The HD content services are still not provided to many of the countries. Beln, D-Smart, DSTV Africa, and Digiturk provide the highest number of HD channels in the region

❑ Still, primary limiting factors to TV reception remain power availability and purchasing power.



# Africa Key Drivers

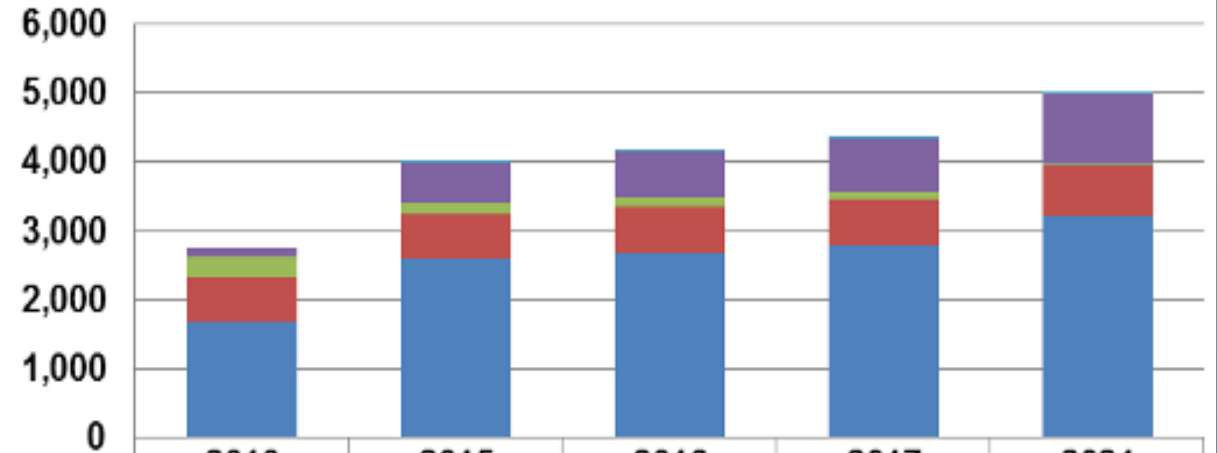
- ❑ The Economic growth and emergence of a middle-class eager to pay for TV services.
- ❑ New DTH projects and expansion to new markets for existing platforms.
- ❑ Wider availability of local content.
- ❑ Growing number of DTT and free-to-air DTH services with digital switchover.
- ❑ HD to take-off since 2020.



- Statistics for Pay-TV platforms and HDTV signals in Africa -

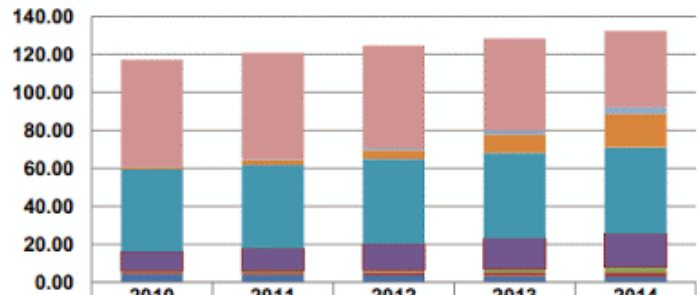
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## Middle East & North Africa pay TV revenues by platform (\$ mil.)



	2010	2015	2016	2017	2021
DTT	0	3	5	9	32
IPTV	140	585	672	757	1,022
Analog cable TV	294	168	141	107	15
Digital cable TV	659	638	656	676	738
Satellite TV	1,670	2,593	2,682	2,787	3,208

## Middle East & Africa TV homes by platform (mil.)



	2010	2011	2012	2013	2014
Analog terrestrial	56.25	56.08	54.07	48.54	40.46
Pay DTT	0.16	0.40	0.96	2.14	3.13
FTA DTT	1.28	2.53	4.76	9.77	17.75
FTA digital DTH	43.35	44.00	44.52	45.02	45.53
Pay DTH	10.37	11.78	13.91	16.10	17.79
Pay IPTV	0.45	0.69	1.07	1.60	2.49
Digital cable TV	1.29	1.61	1.90	2.24	2.58
Analog cable TV	4.07	3.68	3.44	3.05	2.66

Source: Digital TV Research

- Statistics for FTA and Pay TV Subscribers/Revenue Growth in Africa -

# Cont.

Market full of life for the nearby coming years

Source: Satellite Market & Research EMEA

Market on the edge of a great blooming era

Source: Satellite Evolution Group

The pay TV has grown over than 15% in 2015 and still growing.

Source: Talkmedia Africa

It is expected an increase in the satellite home reception within the coming years.

Source: ScreenAfrica Magazine

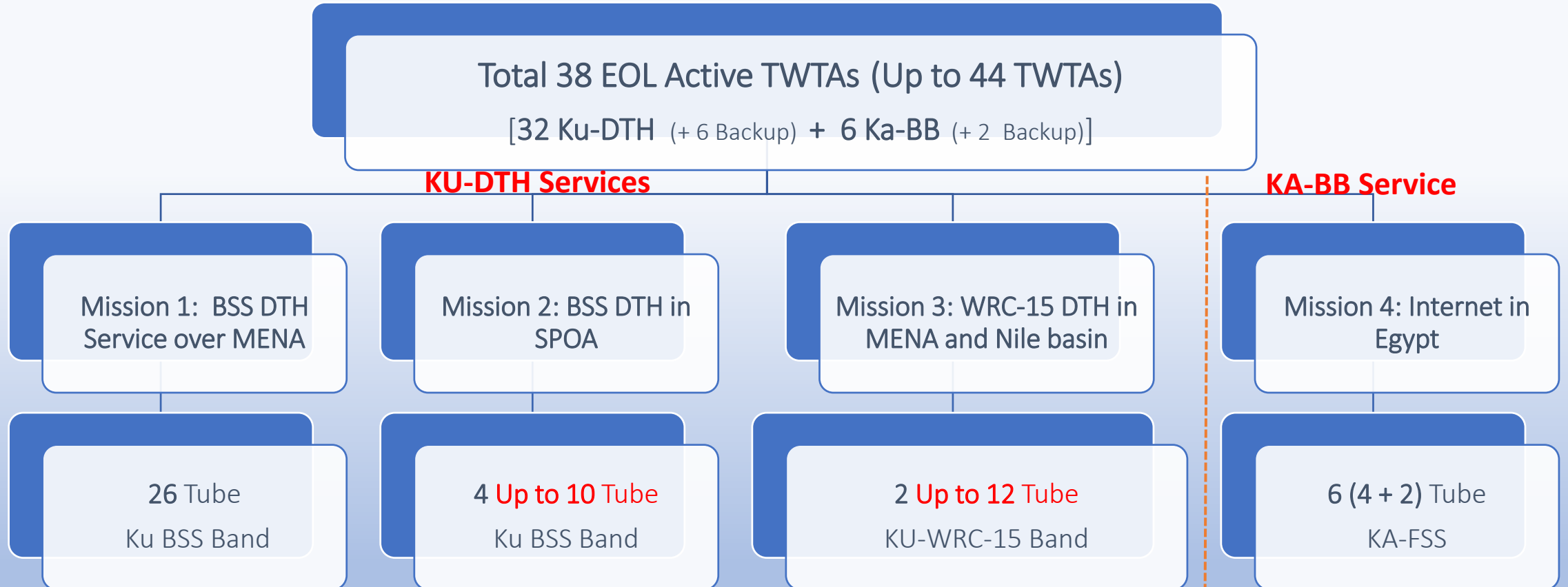
**Quote on African DTH Market**

# [Current Project] - N301 Over View

- ❑ **Nilesat** aims at meeting future demands and applications by merging new satellite technologies and viewer demands.
- ❑ **Nilesat** new generation satellite shall provide new coverage and services to:
  - Extensive Coverage of MENA Region.
  - Explore new opportunities in other African countries, as SPOA and NB regions.
  - Provide Broadband Services using Ka-Band frequencies over Egypt.
  - Providing more capacities to meet future demands of Ultra High Definition (4K).



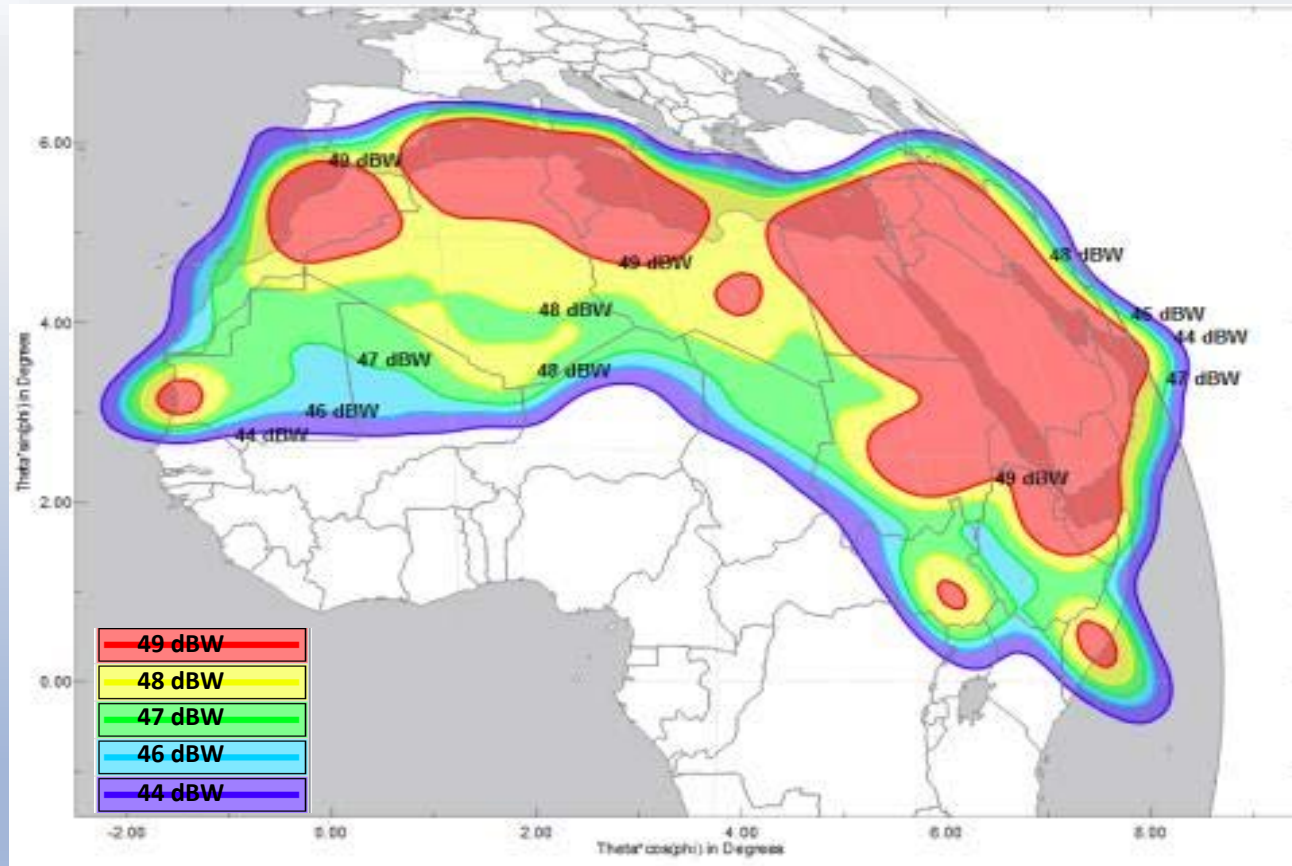
# N301 Missions



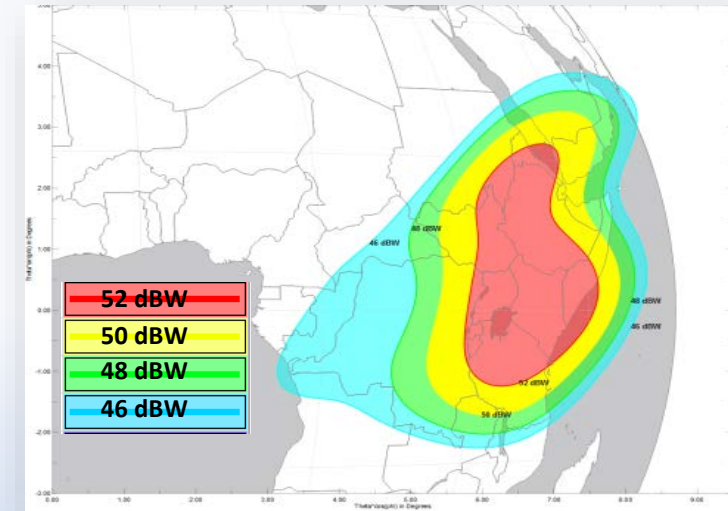
**Note: The “KU-BAND” TWTA Bank include:**

- 26 Standard TWTA (11.7 – 12.75 GHz)
- 12 Wide TWTA (11.7 – 13.75 GHz).

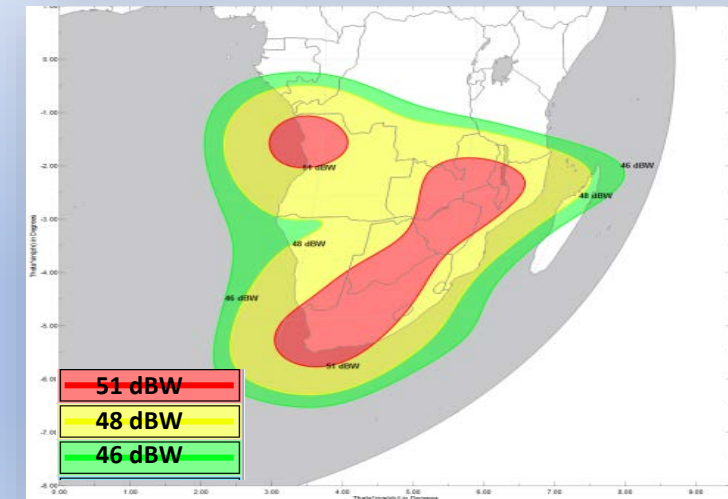
# N301 KU-DTH Services



- BSS/WRC-15 DTH MENA Coverage Area -



- BSS DTH NB Coverage Area -



- BSS DTH SPOA Coverage Area -

# N301 KU-Band Flexibility and Switchability

**BOL Till Year 2028/2030**

Total (38 KU-band)

26 Ku-  
Standard

12 Ku-  
Wide band

6 tube(isolation)  
+ 4 tube (mitigation)  
+ 6 tube (back-up for N201)

10 tube

Up to 10 tube

All wide tubes are configurable in  
MENA/Nile basin

2 tube

**Year 2028/2030 Till EOL**

Total (32 KU-band or possibly more)

26 Ku-  
Standard

12 Ku-  
Wide band

26 tube

Up to 6

4 tube

All wide tubes are configurable in  
MENA/Nile basin/SPOA

2 tube



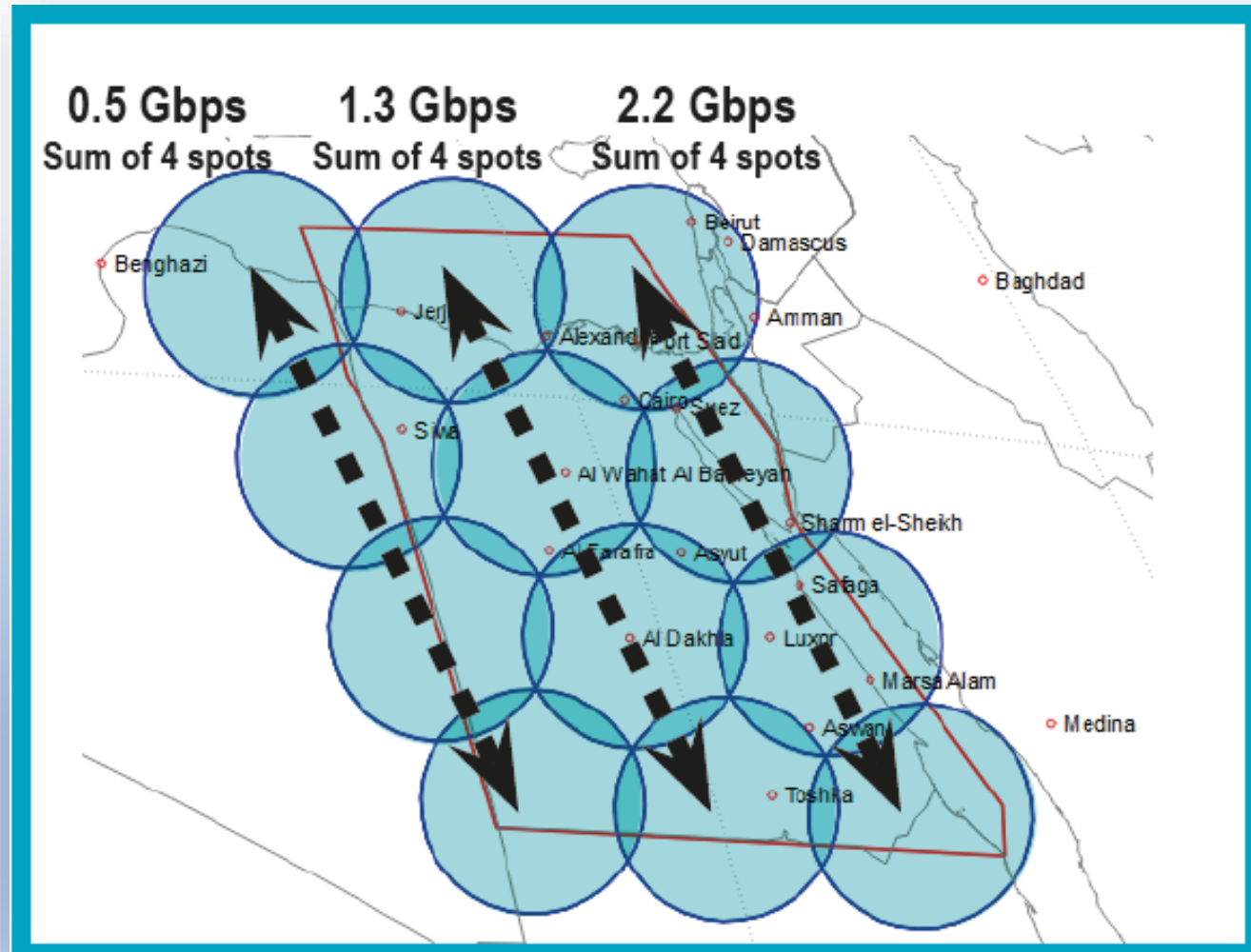
# N301 KA-BB Service

## RTN:

- User (U/L) 29.5 – 30 GHz,
- Gateway 18.4 – 18.9 GHz.

## FWD:

- Gateway (U/L) 27.5 – 29.5 GHz,
- User (D/L) 19.2 – 20.2 GHz.



**THANKS**