

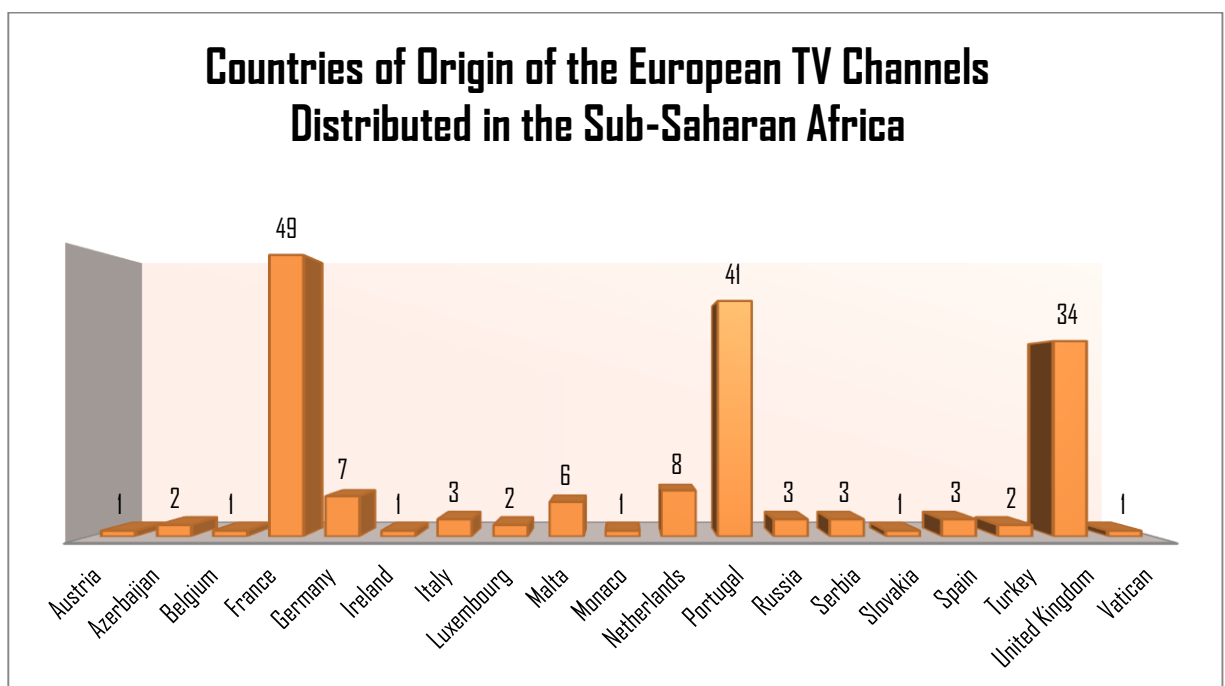
European TV Channels Distribution in the Sub-Saharan Africa

Having used the database of LyngSat web page State Enterprise “Precise Electromechanics Factory” has identified **165 TV channels** with definite origin in the European countries which are distributed via satellite communications networks across the Sub-Saharan Africa (SSA) in November 2022. The real number of such video content may be more considerable as far as it has been impossible to determine the origin of a part thereof. Please take note of the following general approaches which have constituted the basis for the analysis of the data contained in this report. We consider Europe rather in the geographical rather than political meaning, id est from the Atlantic Ocean to the Urals, Caucasus and Bosphorus. We have not included in the report the data on the TV channels’ distribution which is not targeted particularly to the region under consideration, id est reaching only the region’s peripheries outside footprint centers.

As compared with the number of the SSA TV channels distributed via satellites which exceeds 1400, 166 seem not too much to say about cultural imperialism in the satellite TV sphere. However the audiovisual services’ measurement may not be restricted to quantities but should take account of the qualitative factor as well. As soon as the bulk of the African endogenous video content originates from Ghana, Nigeria, Ethiopia, South Africa, Kenya and Cameroon, the distribution of the overseas high-quality TV channels may be critical for a number of countries with relatively weak media production.

As laid out by **countries of origin** the TV channels come to the SSA from 19 countries of Europe which are represented below in Figure 1.

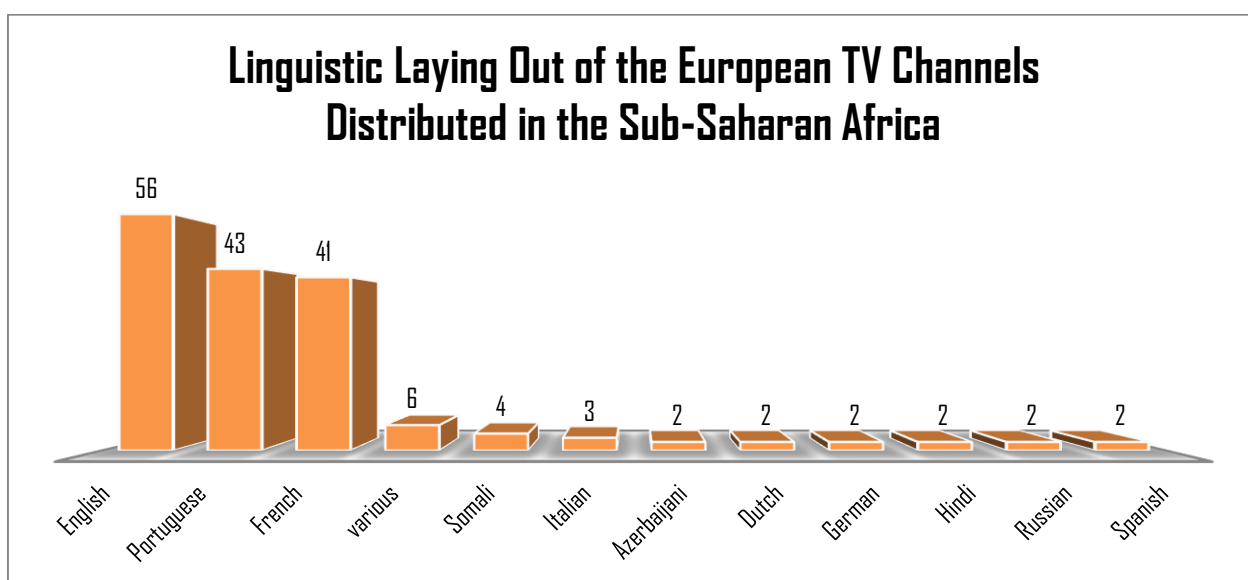
Figure 1



The top-3 originating countries are easy-to-predict. They are mother countries for the most widely spoken in SSA European languages: France, Portugal and the UK. The contribution of France to the overall amount of the TV content is peculiar for its high share of political and musical programs. The high share of Portugal is enforced due to the former's role as the intermediate landing point for the American TV channels' Portuguese-language versions. The UK role is distinctive for the high amount of the video content targeted specially to the African audiences including religious channels both for the Christian and Islamic communities. The TV channels originated from the rest of the countries enumerated are mainly designed for the consumption by the compatriots in Africa or are thematic channels, sometimes with distinctive specialization with regard to the content. For example, all adult-content channels come to the region under consideration from the Netherlands, the channel about cars is broadcasted from Germany, while the majority of channels devoted to gambling are from Malta and Serbia. There is little content from the Eastern parts of Europe represented in TPEs oriented to SSA. Here we have Slovakian channel with the content for children, two channels from Azerbaijan in this country's national language. In the regional media landscape Russia is represented with three TV channels: two in Russian and one in English. The case of Turkey is remarkable for NTR TV, the English-language infotainment channel for the African audience. The content from Northern Europe is not represented in SSA.

The European TV channels are broadcasted in SSA almost entirely in the European **languages** as Figure 2 demonstrates.

Figure 2

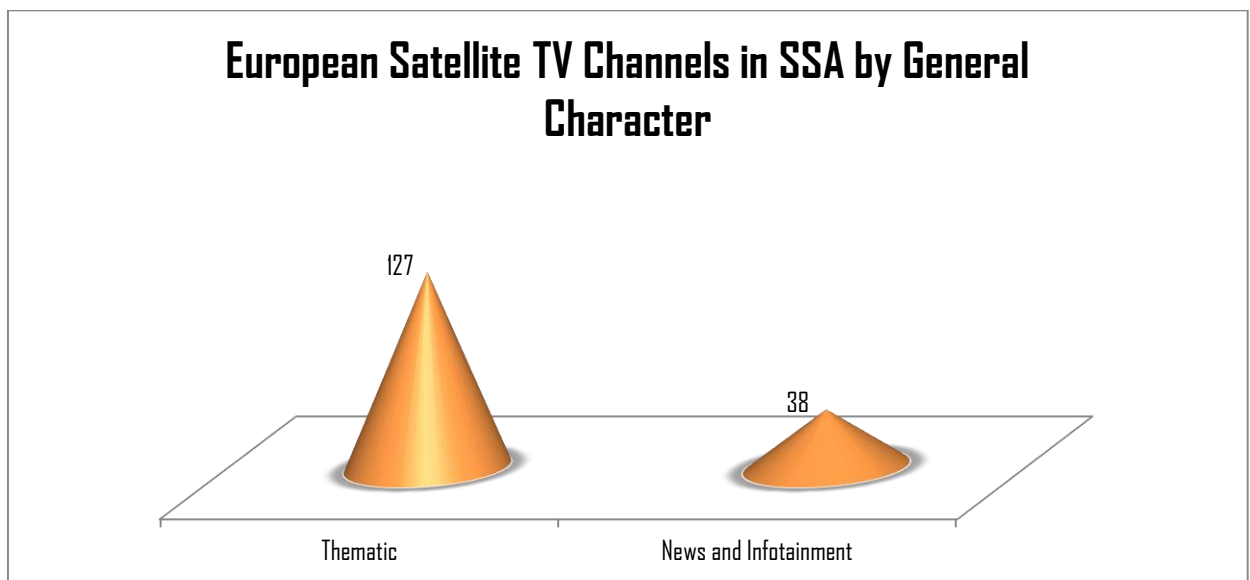


The two exceptions are 4 channels in the Somali languages and 2 channels in Hindi, all originating from the UK. Usually, a channel in a particular language is broadcasted from the country where this language is

spoken. However, 6 French-language channels are distributed from countries other than France, while 3 channels in Portuguese are from European countries other than Portugal. There are more English-language channels distributed from outside of the UK than from the Great Britain itself, namely 30 against 26. It is no doubt that the lack of the content in African languages erects natural limitation for the European TV channels flow to SSA. Radio stations with their considerably wider linguistic spectrum are in more favorable position, especially when they are converted from classical media into multimedia platforms.

If laid out by **general character** 127 (77 per cent) European satellite TV channels in SSA belong to the thematic content while 38 (23 per cent) channels relate to news and general infotainment channel (see Figure 3).

Figure 3



For the purpose of this report preparation the European TV channels distributed in SSA are divided in 13 **thematic categories**. The names of these categories mostly speak for themselves (see Figure 4). We need to comment upon the difference between Foreign Policy Propaganda and “Soft Power” channels. The first category is stuffed with the information and political content for overseas audiences in the European languages which are either official languages or widely spoken languages in SSA. In the second category we have included either the infotainment or cultural content in the most widely spoken European languages in SSA or the political content not widespread in the African region. Both two categories if put together make up the most sufficient content’s portion which is rated at the distribution of particular country’s or group of countries’ estimates and values though separately they yield to film channels. 38 European satellite TV channels are broadcasted especially for the African audiences (See Figure 5). However apart from 4 channels for Somalia all the rest content for Africa is in the European languages.

There is evident disproportion between thematic content's categories. While there is little room for further growth of the TV content flow in such categories as film channels and channels for children not adopted for African audiences there may be increase in the sports and some other thematic channels like car or health.

Figure 4

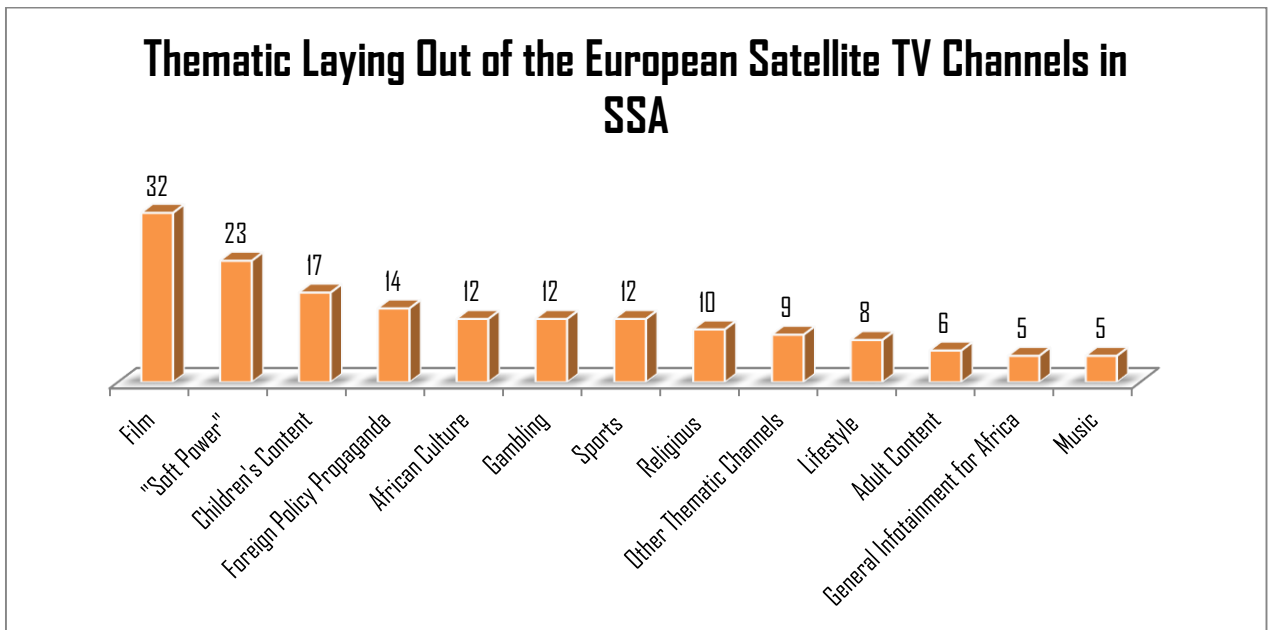
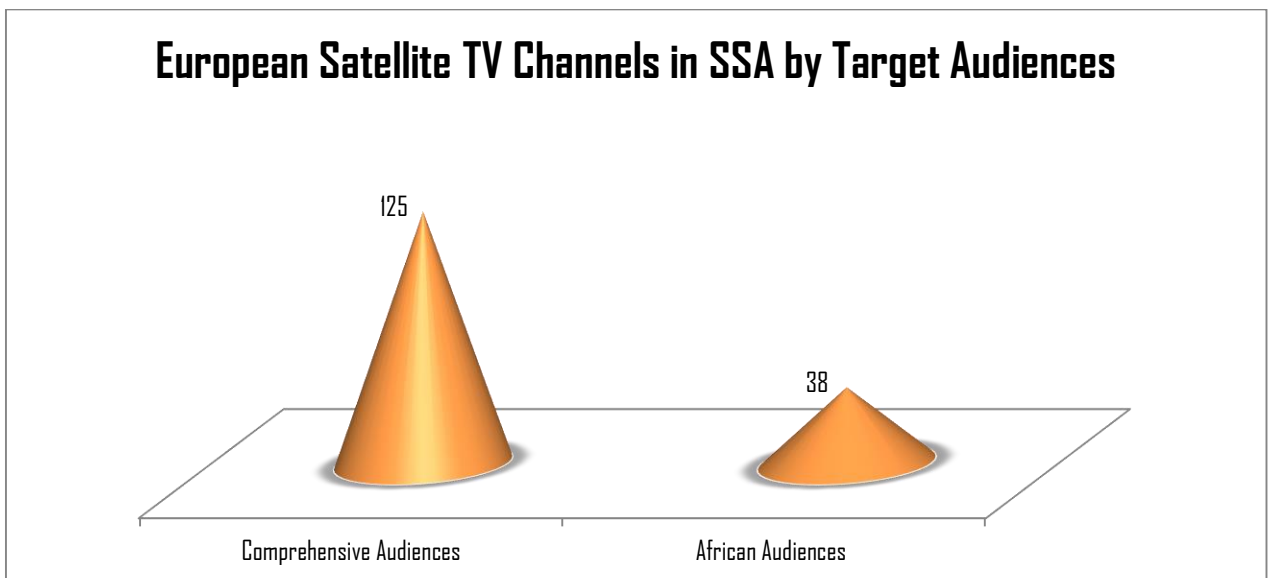


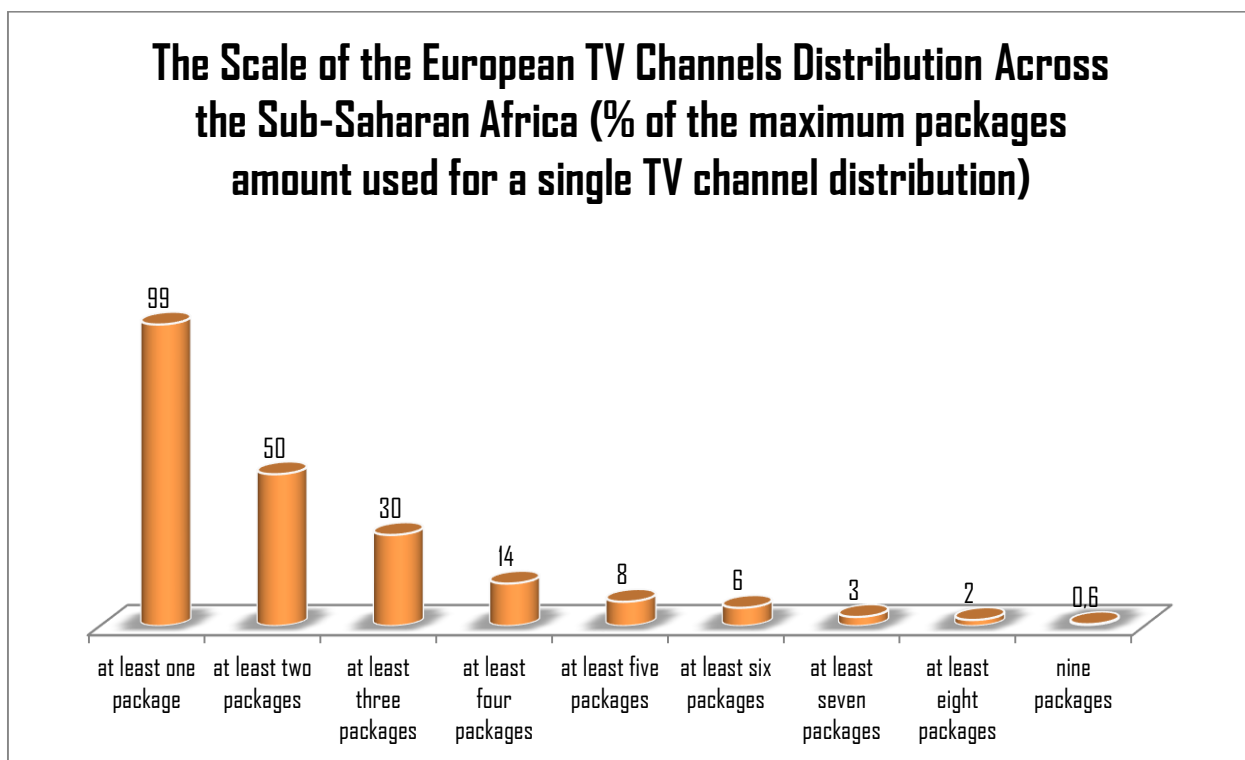
Figure 5



Among 165 European TV channels distributed in SSA we have identified just 2 channels, Afro Music Channel and BBC Lifestyle Africa, which are broadcasted outside **packages** and platforms. So, packages and

platforms owners are almost inevitable intermediaries between satellite networks operators and content distributors. Figure 6 demonstrates that only a half of the TV channels are broadcasted in more than a single package. Certainly, all packages are fastened to particular countries' audiences and thus to particular languages. However, the overwhelming majority of packages are not restricted to one language.

Figure 6



Among nine TV channels which are broadcasted in at least six packages the four ones are foreign policy propaganda content from France and the UK: BBC World News Africa, France 24 English, France 24 Français, Sky News International. Two channels are devoted to African culture, namely musical channels: Afro Music Channel And Trace Mziki. The three rest ones are an infotainment channel for Africa TV5Monde Afrique, a channel for the Portuguese language compatriots RTP Internacional Europa and a children's content channel JimJam TV.

Overall 28 TV packages distribute European content in SSA. As the information in Figure 7 demonstrates the majority, namely 67 per cent of the European content is distributed via packages with African owners, 26 per cent of the distribution is carried out by non-African distributors (European and Chinese) and the rest 7 per cent remains for the distribution with unclear origin. Among the top-10 packages (see Figure 8) DStv Africa, Canal + Afrique, StarSat and Azam TV belong at the same time to the list of the biggest African satellite TV channels in general. In the region under consideration 77 per cent of the European TV channels are distributed encrypted at least in parts of the packages (see Figure 9).

Figure 7

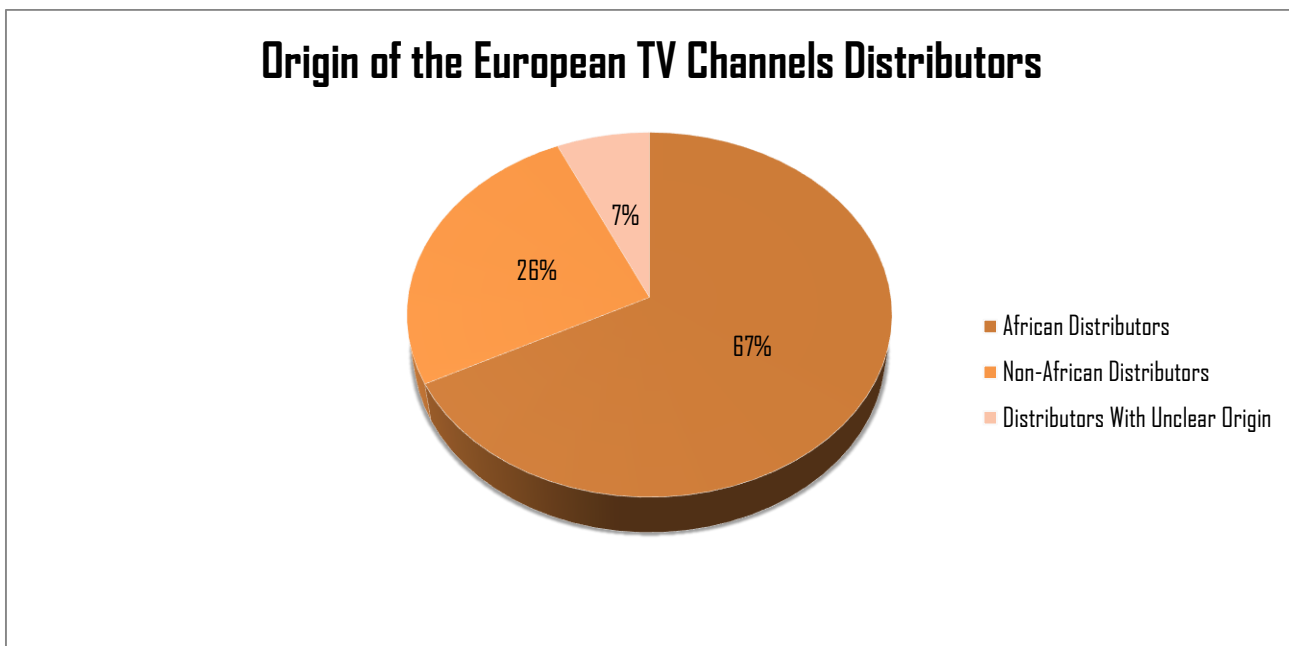
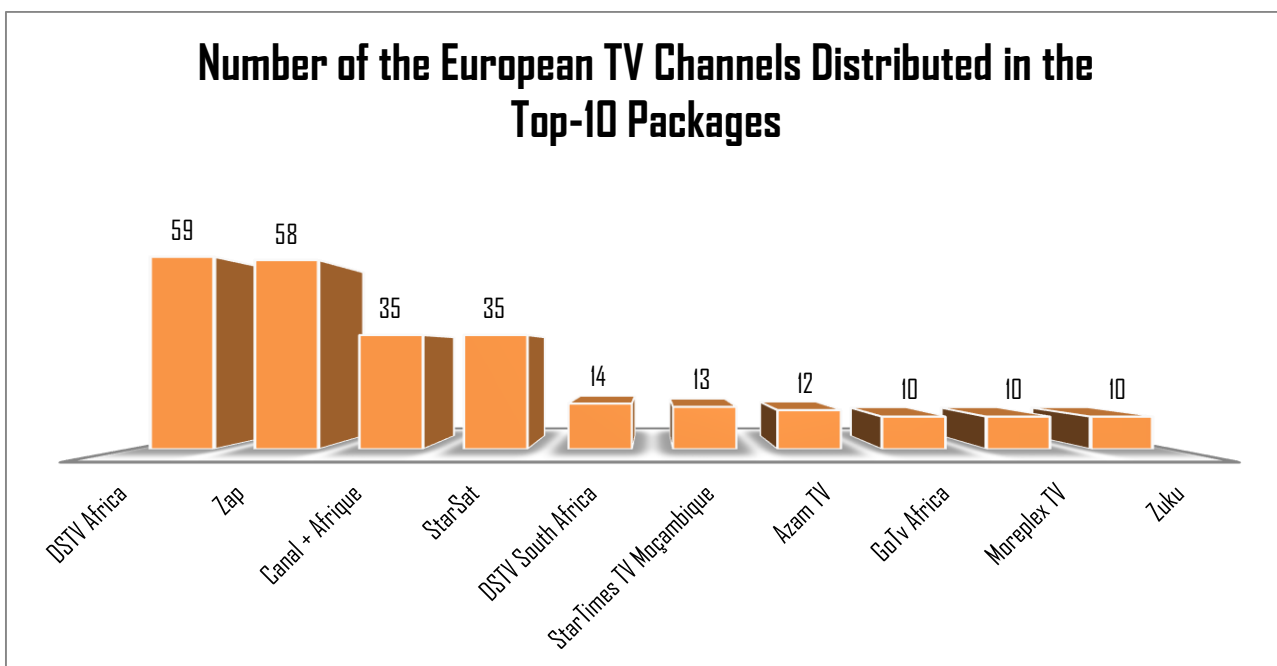


Figure 8



The majority (161) of the TV channels are broadcasted in **Ku-band** with only 48 in **C-band** (see Figure 10). For the 44 channels' distribution both frequency bands are applied. These digits demonstrate the predominance of DTH as the European content's delivery mode thus restricting its reach to relatively small group of paid satellite TV subscribers.

Figure 9

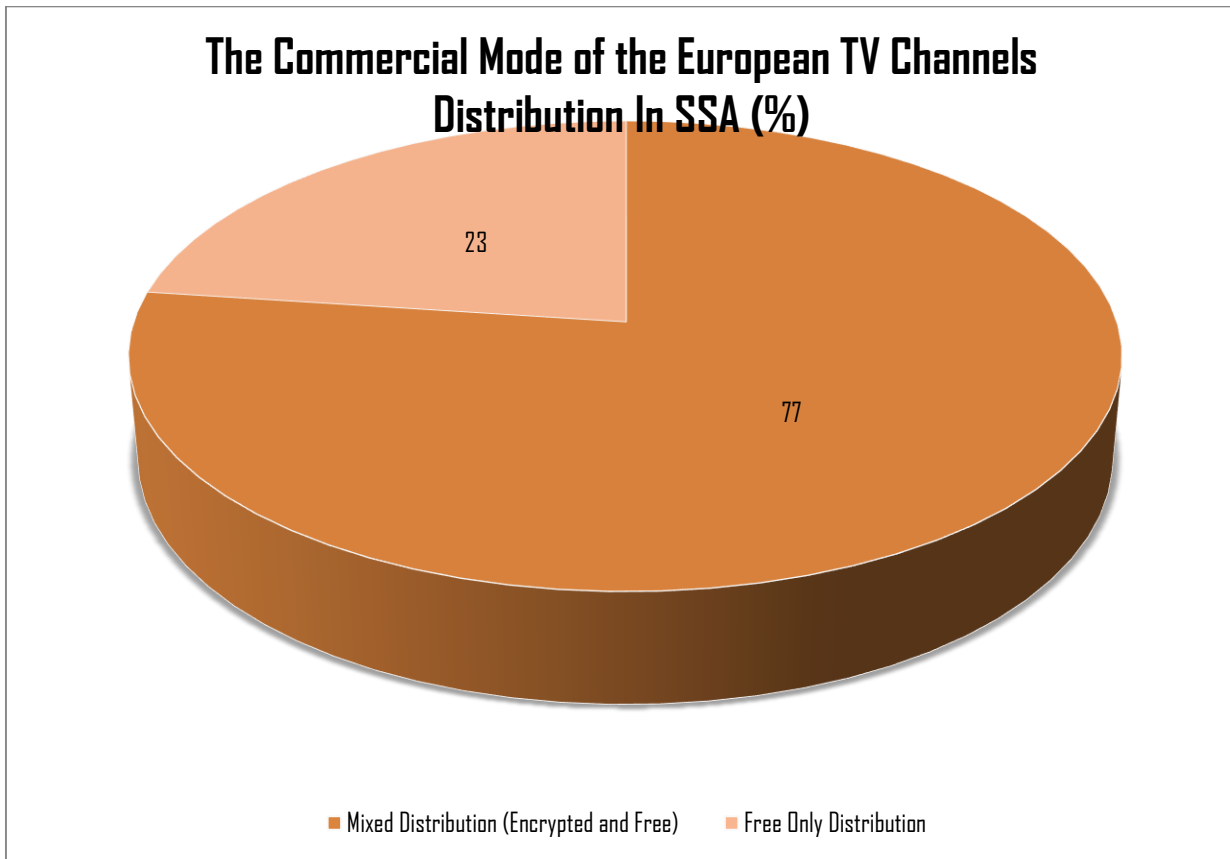
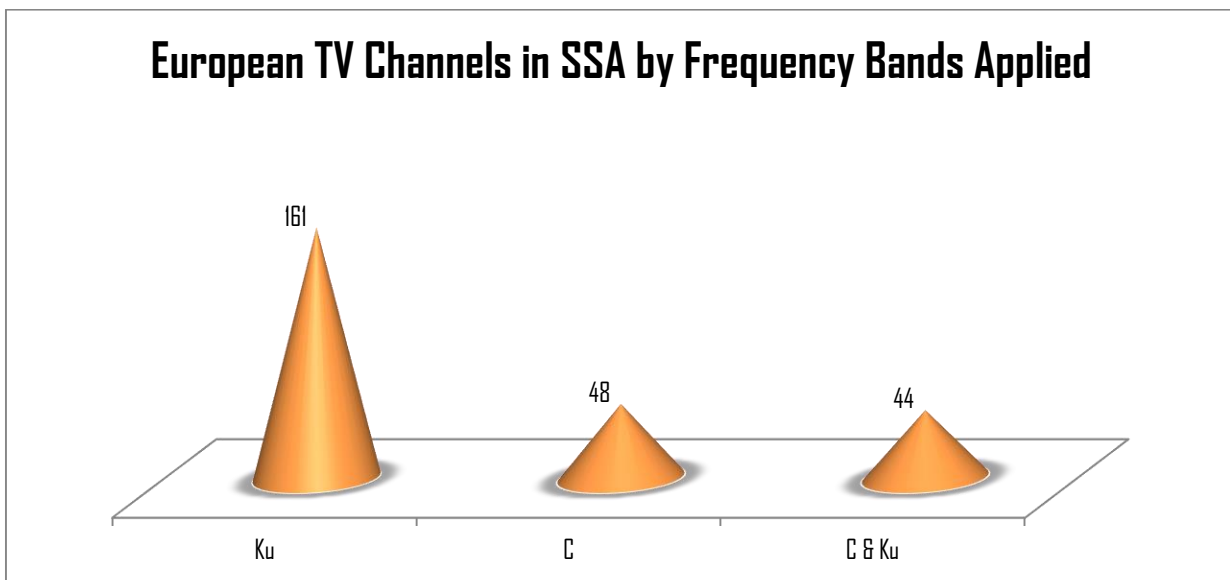


Figure 10



According to our calculation 14 **satellite communications operators** serve the European TV channels distribution in SSA. 69 per cent of the distribution is controlled together by Eutelsat S.A. and SES S.A.

Figure 11 demonstrates the TV content distribution according to the orbital segment applied. Overall 29 spacecrafts transmit the European TV channels in SSA. All the distributing operators are of the European, Asian and African origins. It is worth noting that satellite Belintersat-1 operated by “Precise Electromechanics Factory” from Belarus is in the top-five spacecrafts serving the market under consideration not relating to the Eutelsat and SES networks. Another aspect to be noted about the content distribution is the low market share of African operators which together bring to users 3 TV channels. As soon as there is evident long-term trend towards the shift of the satellite capacity towards serving data communications we can hardly expect the sufficient extension of the distributing operators’ list but there may be the partial market re-allotment in favor of the operators with specialization on the African video market. Perhaps newly launched AngoSat-2, if its operator elaborates attractive marketing strategy, has good chance to take over certain share of the content distribution, primarily in the Portuguese language.

Figure 11

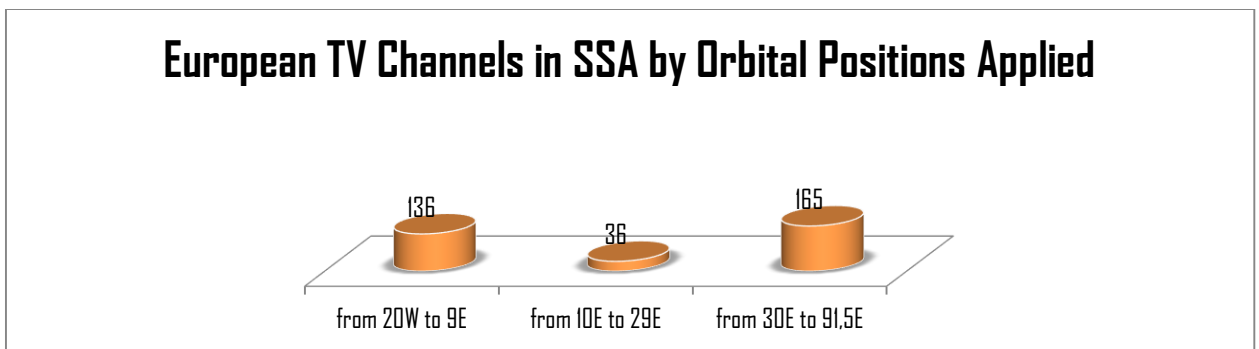
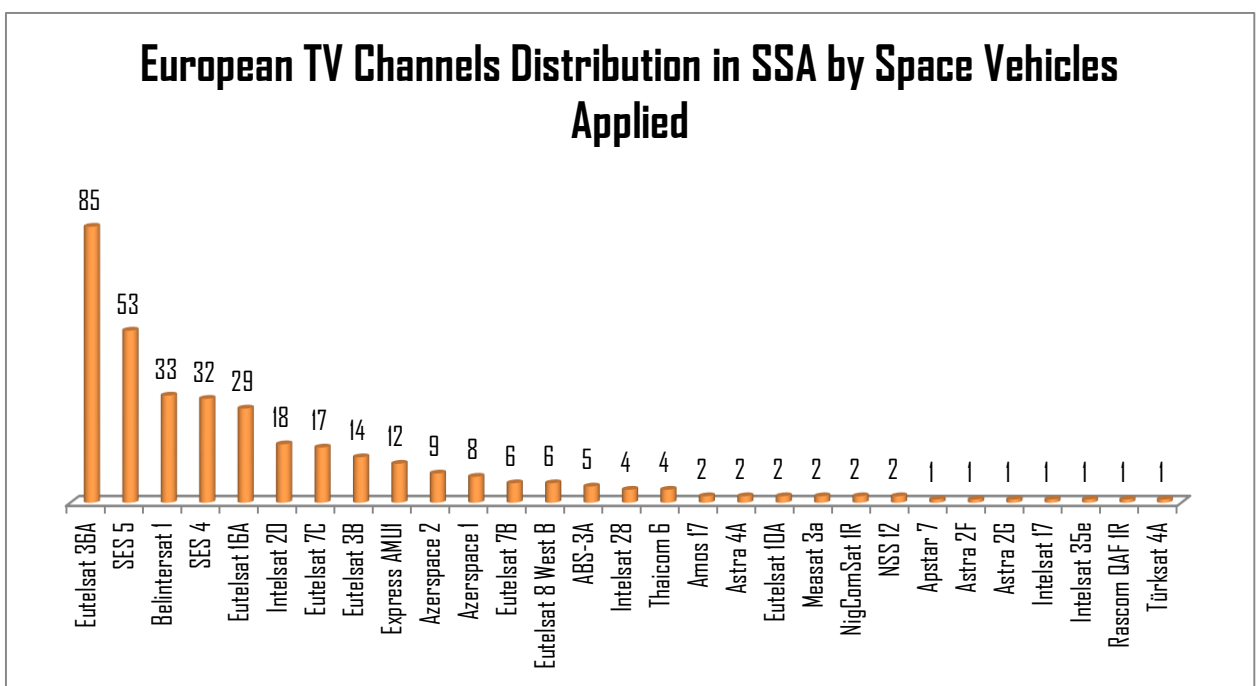
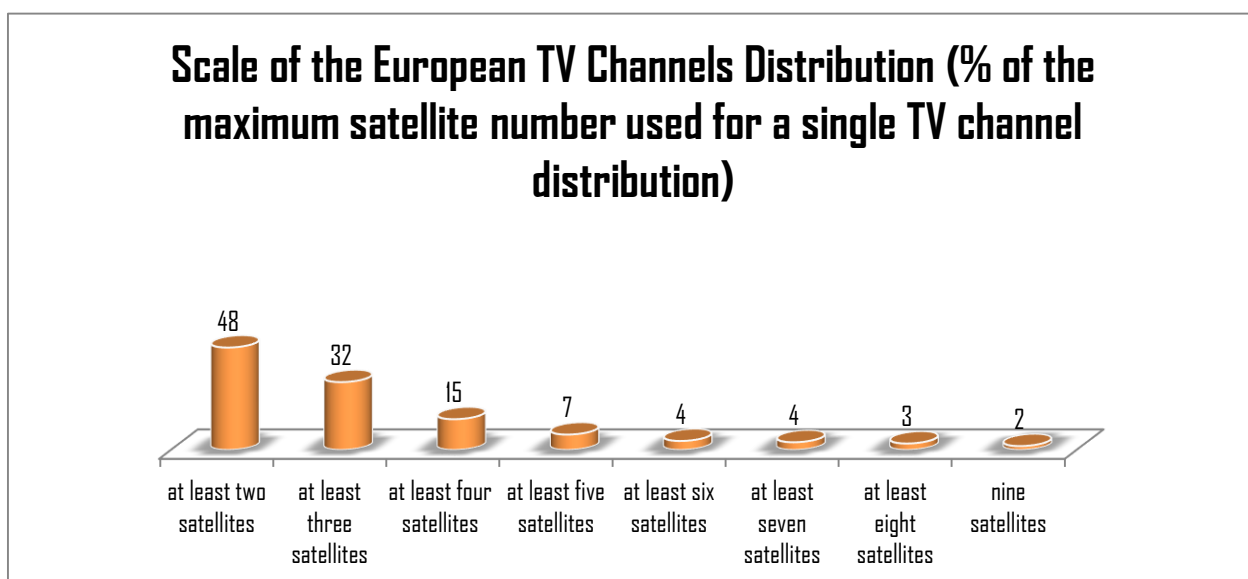


Figure 12





Just 48 per cent of the European TV channels are distributed in SSA via more than one satellite (see Figure 13). 12 TV channels broadcasted via at least five satellites are: 4 foreign policy propaganda channels (France 24 Français, France 24 English, Deutsche Welle English, BBC World News Channel), 3 infotainment channels (Tivi5Monde, TV5Monde Afrique, RTP Internacional Europa), 3 channels with children's content (Fix & Foxi, Baby TV Europe, JimJam Europe) and 2 channels devoted to African culture (Afro Music Channel, Trace Mziki). However the opportunity to increase the number of satellites serving single TV channel distribution depends mainly upon packages or platforms owners' willingness either to broaden their content distribution or to shift from satellite networks to other ones. Table 1 shows the current state of cooperation between satellite TV packages and satellite communications networks. As it is seen from the related data every media package or platform with European TV channels is served by a limited amount of satellite operators but Eutelsat S.A. and SES S.A. serve overwhelming majority thereof.

Table 1

<i>Major TV Packages</i>	<i>Satellite Operators Distributing TV Packages with European TV Channels in SSA</i>
Azam TV	Azercosmos Eutelsat SES
DStv Africa	Azercosmos Belintersat Eutelsat Intelsat RSCC SES
DStv South Africa	Eutelsat Intelsat RSCC SES

Globecast	Azercosmos Eutelsat Intelsat RascomStar RSCC
GoTv Africa	Eutelsat Intelsat RSCC SES
Mediavision	Eutelsat SES Thaicom
Moreplex TV	Belintersat Eutelsat SES
Panbetting	Belintersat Space Communications SES
Satelio	SES
StarSat	Belintersat SES
StarTimes TV	Eutelsat SES
TNT Sat Africa	Eutelsat RascomStar SES
TSTV Africa	Belintersat Nigerian Communications Satellite RSCC SES
UAU!TV	Eutelsat Intelsat SES
View Satellite Network	Azercosmos
Viewsat	Intelsat
Vivacom MCPC	Azercosmos Belintersat Eutelsat
WAP	SES
WiTV Africa	ABS
ZAP	Apstar Eutelsat Intelsat Measat RSCC SES

General Conclusions on the opportunities of the market expansion:

- *little place for further growth in the distribution in SSA of the Western European TV channels not targeted at African audiences apart from a few thematic categories such as sports, religious and lifestyle (esp. car and health) channels;*
- *detection of the European TV channels for African audiences which are not yet at satellites;*
- *up-linking to satellites of TV channels from Eastern and Northern parts of Europe in the official languages of the SSA countries or widely spoken in SSA;*
- *increase in the number of satellites for particular channels distribution wherein channels with content for African audiences enjoying evident advantage;*
- *making up of new satellite TV packages for African audiences;*
- *competition between satellite communications operators for shifting of TV packages distribution between satellite networks.*