Modern Satcom Technologies & Consumer Benefits

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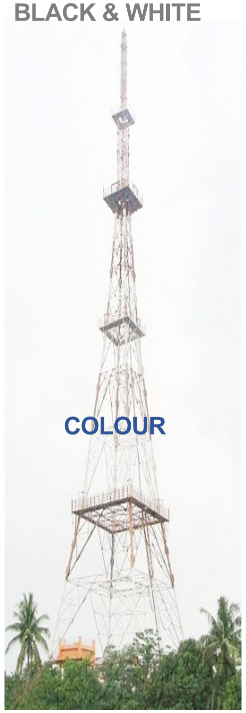
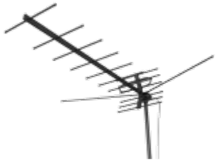
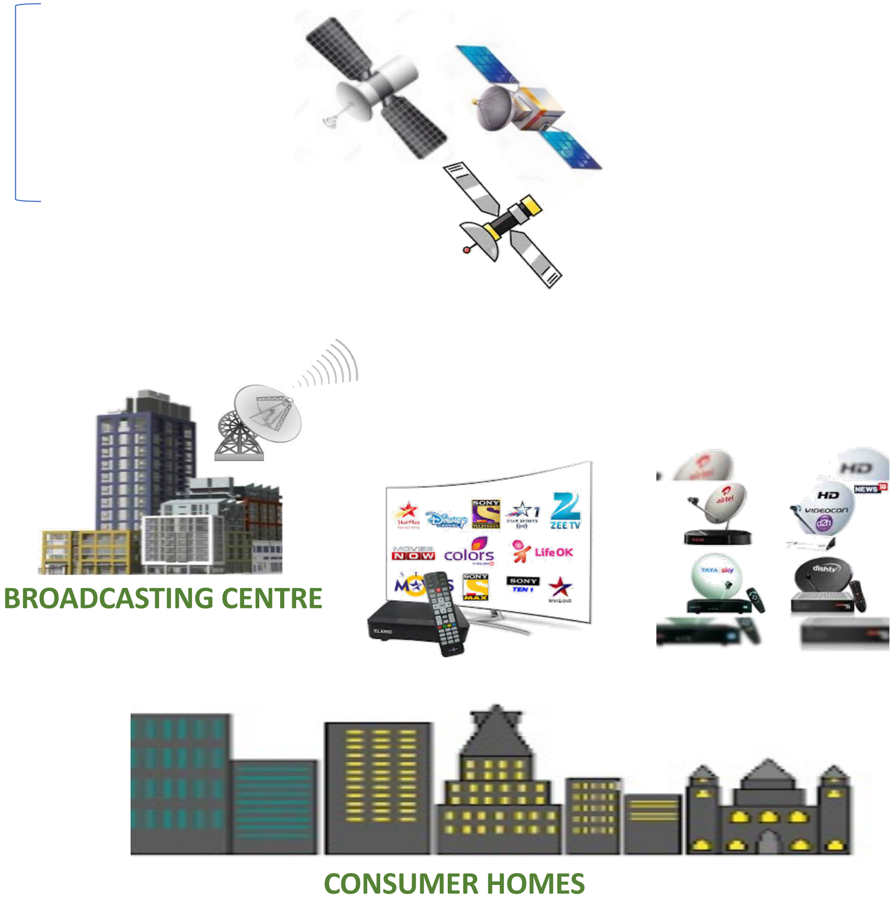
FLASH BACK

BLACK & WHITE





20|20



LAST 20 YEARS

YEAR	CHANNELS
2005	130+
2010	265+
2015	550+
2020	900+

SHARE OF DISTRIBUTION

YEAR		
2005	50%	50%
2010	36%	64%
2015	6%	94%
2020	2%	98%

TOTAL C&S HOUSEHOLDS
183+ Million

Source: Broadcast India study, IRS, Census, Industry Reports

What is happening?

Delivery of entertainment to consumer is moving from satellite delivery to non-satellite delivery options.

Deeper penetration of internet
Faster speed
Ease of launch & availability
Multiple options
New tech stack

THREAT OR OPPORTUNITY???

OPPORTUNITY!!
THREAT OR OPPORTUNITY???

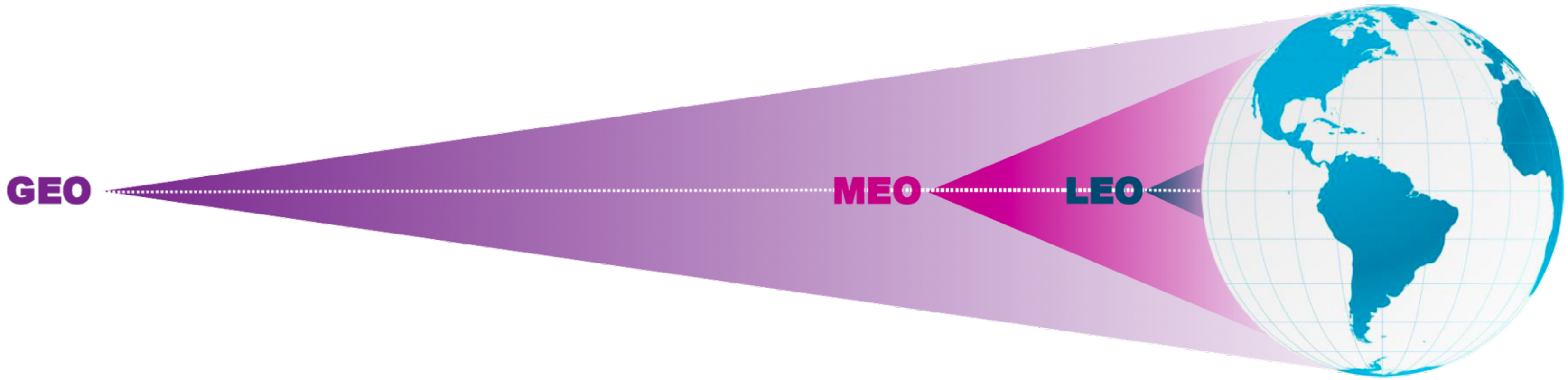
India is diverse
Geographic/ Terrain advantage / ease of use / First Mover advantage
Utilize Existing Infra, Unlike fiber laying and creation of Infra
Fixed broadband household penetration below 15%
Many villages / Rural parts still have no 3G/4G
Only 33% of mobile towers fiberized
Pricing Power
Linear TV ad revenue still significant.

Source:Telegeography, Govt of India,Economictimes, MPA Asia

NEXT 20


Innovation is the ability to see change as an opportunity - not a threat
— Steve Jobs —
AZ QUOTES

SATELLITES PLAY A KEY ROLE IN INDIA'S CONNECTIVITY AMBITIONS



- NGSO - Non Geo stationary orbits to be optimized

Due to low earth orbit- low latency applications
It can have greater capacity in access creating cloud CDN opportunities

- HTS – Enhanced Bandwidth
- Software defined satellites are coming which can define beam smartly
- EDGE computing using satellite can improve OTT delivery
- 5G
- IOT

Thank you