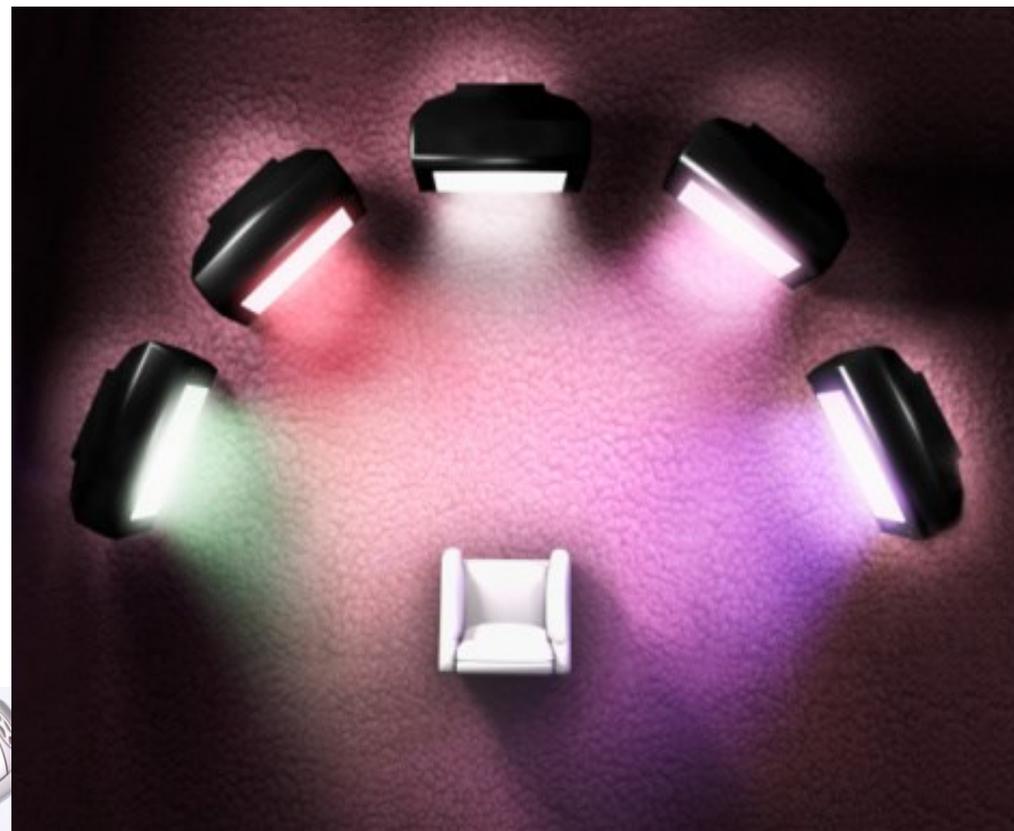# The 7th ACRAN SUMMIT

The media regulatory bodies face the transition to digital in Africa: Roles and Challenges

HOTEL GAWEYE - : 10th -12th December, 2013
NIAMEY, NIGER

Presenter: N. Habbi Gunze
Director of Broadcasting Affairs
Tanzania Communications Regulatory Authority

Agenda

Background

Status of DTT

Roles of Regulator

Challenges

Conclusion

Good News!

Tanzania Started Switch Off the Analogue Transmission Systems on 31st December, 2012

Background

- Tanzania adopted a phased approach on switching off the analogue transmission sites

- First Phase (Phase I) of the Analogue Switch Off started on 31st December, 2012 in Dar Es Salaam.

- The Authority supervised the analogue transmitters switch off as per ASO time table (Phase I) provided by the Government.

- First Phase (Phase I) involved Seven cities namely Dar Es Salaam, Mwanza, Arusha, Moshi, Dodoma, Tanga and Mbeya
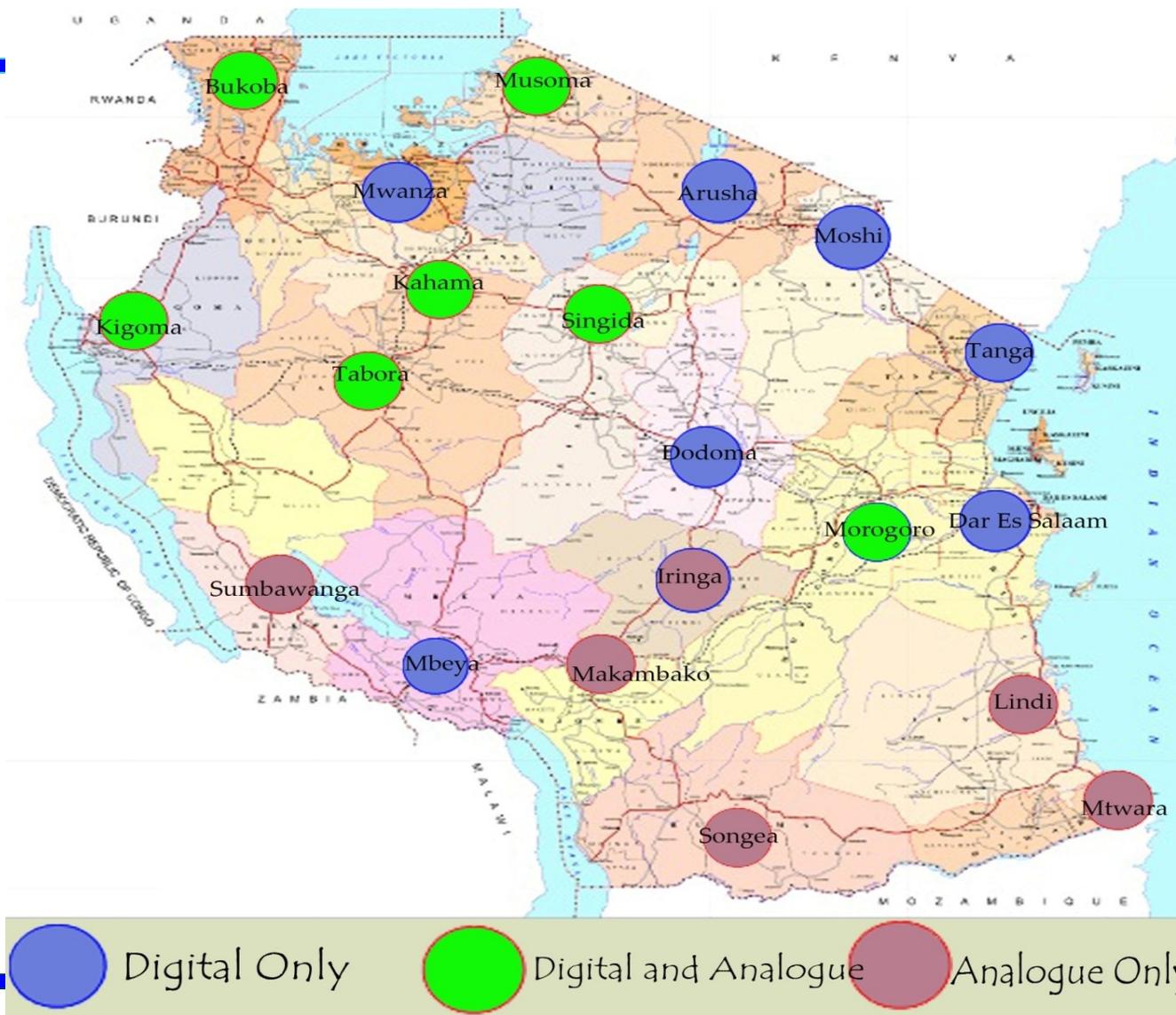
ASO Timetable

Broadcasting Service Area	ASO Date	Affected Areas	Involved Stations
Dar Es Salaam	31/12/2012	Dar Es Salaam City, Kibaha, Bagamoyo, Kisarawe and Mkuranga	TBC1, ITV, EATV , CH.10, STAR TV, DTV, CAPITAL, TUMAINI, ATN, MLIMANI, C2C, CTN, CLOUDS & EFATHA
Dodoma & Tanga	31/01/2013	Tanga City and Dodoma Municipal	TBC1, ITV, EATV , CH.10, STAR TV, TANGA MANICIPAL TV & ATN
Mwanza	28/02/2013	Mwanza City	TBC1, ITV, EATV , CH.10, STAR TV& ATN
Moshi & Arusha	31/03/2013	Arusha City and Moshi Municipal	TBC1, ITV, EATV , CH.10, STAR TV& ATN
Mbeya	30/04/2012	Mbeya City	TBC1, STAR TV, MBEYA CITY TV& ATN

25 March 2015

Current Status

- Seven cities namely Dar Es Salaam, Mwanza, Arusha, Moshi, Dodoma, Tanga and Mbeya are *Fully Digital* .

- The ASO performance survey to measure the impact of Analogue Switch Off of Analogue Terrestrial Television to the Broadcasting industry is being conducted before embarking to the Second Phase (II) of ASO.

- The Second Phase (II) will involve seven cities (Kigoma, Morogoro, Tabora, Singida, Musoma, Bukoba and Kahama) that are currently in simulcast

- Tanzania planning to have all analogue transmission sites switched off by June, 2014.

The National Technical Committee for Digital Broadcasting (NTCB) outlined five ASO switch criteria

- The Analogue TV service area should be well covered with digital TV signal.
- Public awareness campaign on digital migration has been done sufficiently.
- Availability of the Set Top Boxes
- Tax exemption of the STBs to ensure affordability
- 5 FTA TV channels with National Market segment license are available.

Factor/Criteria for switch off

Success Factors

- Digital migration road map

- Political will (The President of the United Republic of Tanzania
DTT Champion)

- Legal and Regulatory Framework (*Electronic and Postal
Communication Act, 2010, Electronic and Postal Communication
(Digital and Other Broadcasting Network) Regulation, 2011 wh
state the switch off date*

- Consultation with stakeholders (MUX, CSP, Consumer
Consultative Council)

- Communication strategy

- Cost (PPP, Private, Tax Exemption for STB)

- Consumers willingness

Roles of the Regulator

1. Legal and Licensing Framework.
2. Develop Digital Migration Roadmap
3. Communication Strategies (Public Awareness)
4. Consultation with stakeholders
5. Institutional framework
6. Consumer willingness

Roles of the Regulator

1. Legal and Licensing Framework .

' 2005   Adopted a Convergence Licensing Framework

' 2010/11: Legal Framework was put in place; Enacting of the Electronic and Postal Communication Act, 2010 and Digital and Other Broadcasting Networks regulation, 2011.

' 2010   Licensed three (3) Multiplex Operators to roll out digital network

Roles of the Regulator

2. Digital Migration Roadmap .

'   In 2005TCRA developed a Digital Migration inline with ITU guidelines

3. Communication Strategies for Awareness Campaign

£   TCRA formulated a Communications Strategy (CS) and approved by the Government.

£   CS provided for all communications outlets including print and electronic media (newspaper, TV/Radios), road shows, talk shows, meetings/seminars and outdoor advertising

£   2011: The President of the United Republic of Tanzania launched the Public Awareness Campaign and the digital logo on 24th August, 2011.
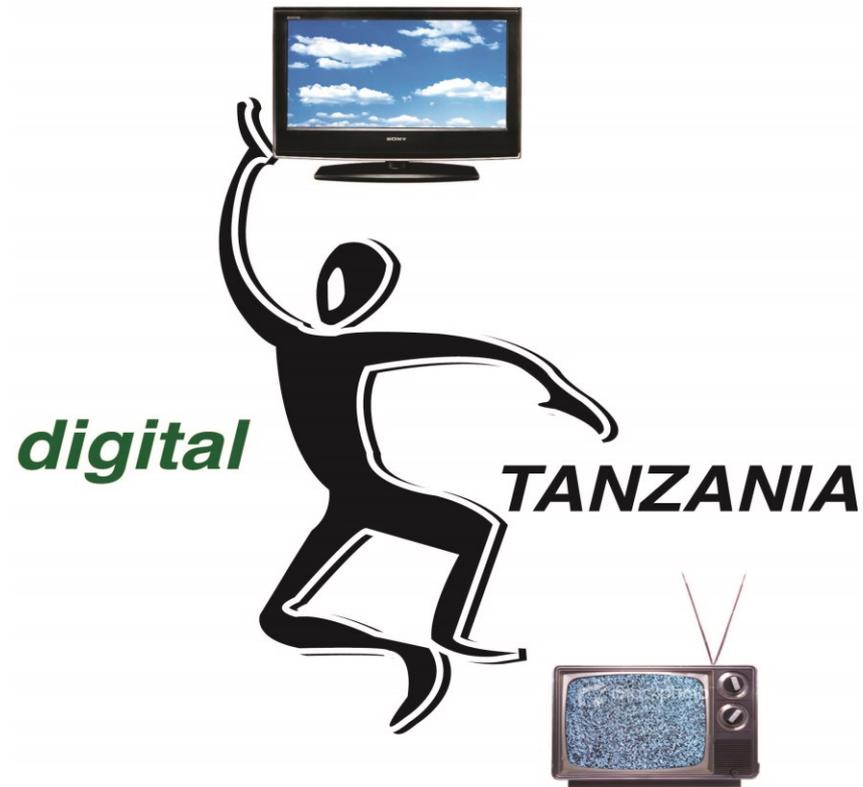
3. Awareness Campaign

DIGITAL LOGO

4. Consultation   with stakeholders   .

'   2004/6:   Participated in the GE 04 & GE 06 processes

'   2005 :   Prepared a Digital Migration Road Map which
consisting of activities, events and timelines

'   2005:   Issued a first public   consultation   document
PCD highlighted DTT and its benefits ;

'   2006:   Issued   Second   PCD : Established   licensing
framework   for DTT ;-Separation of Content and
transmission ;

4. Consultation with stakeholders œ« ª . ° Ÿ

' 2007:   Formation of the National Technical
Committee on DTT Broadcasting (NTC -DB) ;

' 2008:   Inter -Ministerial National Steering Committee
(NSC) **as a Government Organ to oversee
migration.**

4. Consultation with stakeholders œ« ª . ° Ÿ

' 2010: Licensing of MUX through an open tender .

Three Multiplex Operators were licensed to provide digital signal distribution

£ 2012: The Government through the NSC approved a phased ASO in all simulcast service areas.

CHALLENGES

Implementation Challenges

' The DTTB migration implementation challenges can be grouped as follows :

  Content Service related challenges

  Multiplex related challenges

  Regulatory challenges

  Customer related challenges

Implementation Challenges

1. Content Service Providers Related Challenges

- High cost for Simulcast period.
- High transmission fee imposed by Multiplex Operators
- Exclusivity rights on premium content such as Sports
- Lack of enough local and premium content on digital terrestrial platform.
- Upgrade cost for Content Production studios to suite the digital environment.

2. Multiplex Related Challenges

- Weak signal reception in some points within a defined service area due to uneven terrain (Digital Cliff) This may requires of additional transmitters within same area

- Unwilling of Content Service Providers to pay the transmission fee

- Exploitation of the optic fiber in digital broadcasting networks v/s satellite for distribution networks

2. Multiplex Related Challenges

- ' Support services/Toll free number.
- ' Land acquisition for TX facilities from the local government
- ' Availability of power supplies to some sites
- ' Process of environmental Impact assessment
- ' Delayed Building Permit

3. Regulatory Challenges

' Licensing of Multiple Channels

' Licensing of the subscription services

- Do you license a channel or aggregator??
- Legal Relation between the independent producer of subscription content and subscription content service licensee

- Separation of jurisdiction of Signal distributors and CS
- Requirements of having SLA between Signal distributo and CSPs
- Interoperability of Set Top Boxes

3. Regulatory Challenges

' Sustainability of FTA network

' Enforcement of the digital services in underserved areas

4. Customer Related Challenges

- Lack of Education

- Set Top Box interoperability.

- Purchasing of Set Top Box (was not required in analogue)

- Lack of attractive content in Digital Platform

- Dual Illumination has made most of Customers relaxed

- Consumer behaviour (They are used to free to air services)

Conclusion

The prospect of Digital Migration lies on the following factors

- Education to all stakeholders (Consumers, Government, Operators)
- Quality Local Content
- Low price set top boxes (STB) (Affordability and Availability)
- Availability of Free to Air channels
- Converged Licensing Environment (Legal and Institutional Framework)
- Introduction of Value Added Service in broadcasting value chain (Linear to Non-Linear way of Broadcasting).
- Availability of digital equipment

THANK YOU
gunze@tcra.go.tz