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TANZANIA COMMUNICATIONS REGULATORY AUTHORITY

COUNTRY STATUS ON MIGRATION FROM ANALOGUE TO DIGITAL BROADCASTING



A Presentation to the 8th CTO Digital Broadcasting Switchover Forum

Sandton, RSA: 12th February, 2013

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AGENDA

The digital migration success story in Tanzania:-

- 1. Road Map;**
- 2. Political Will;**
- 3. Success Factors;**
- 4. Challenges;**
- 5. Lessons;**
- 6. Conclusion.**



Road Map

Broadcasting is a sensitive mass communication tool and that changes related to it should be well planned in advance. Planning for digital terrestrial television (DTT) was therefore:

- Policy driven rather than market driven;
- The Tanzania Communications Regulatory Authority (TCRA) drew a migration Roadmap consisting of activities, events and timelines as per the Figure 1 below.



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Road Map..Co'td

S/NO	ACTIVITY	RESPONSIBLE	DATE
1.	Consultation with Stakeholders	TCRA, MOCT CHIEF MINISTER'S OFFICE, PMO, ZBC, FINANCE, Operators	09.08.2005 - 30.11.2005
2.	Adoption of Policy on Digital Broadcasting	MOCT and PMO	16.01.2006
3.	Amendment of Legislation	MOCT, PMO, Attorney General Chambers	18.04.2006
4.	Modification of Converged Licensing Framework	TCRA	24.04.2006
5.	Switchover to Digital Broadcasting	TCRA/ZBC Operators	15.6.2006
6.	Simulcast Period	TCRA/ZBC Operators	15.6.2006-14.6.2012
7.	Switch off date of Analogue Broadcasting	TCRA/ZBC Operators	31.12. 2012
8.	Digital Broadcasting Only	TCRA/ZBC Operators	10.01.2013

Fig. 1 DTT Road Map Source: 1st PCD-2005, TCRA



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Political Will

The Government provided full support to ensure timely migration, as follows:-

- Government Buy in;
- Cabinet approval in 2008:-
 - digital migration roadmap;
 - digital migration strategy;
 - communication strategy
- Support by the President of the URT;



Success Factors

1. Consultation

A very powerful and success aspect of regulating a competitive industry. TCRA approaches for a successful policy driven migration :-

- (a) 2004/6 Participated in the GE04 & GE06 processes;
- (b) 2005: Started consultation with stakeholders;
- (c) Issued two Public Consultation Documents. (PCDs):-



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Success Factors..Co'td

Consultation..Co'td

- (i) 2005: First PCD highlighted DTT and its benefits;
- (ii) 2006 Second PCD: Established licensing framework for DTT;-Separation of Content and transmission; Case for establishment of Multiplex Operators MUX);
- (iii) 2007: Formation of the National Technical Committee on DTT Broadcasting (NTC-DB);



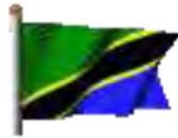
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Success Factors..Co'td

Consultation..Co'td

- (iv) 2008:Inter-Ministerial National Steering Committee (NSC) as a Government Organ to oversee migration. NTC-DB provides technical advise to NSC.
- (d) 2007:Consultation on Regulatory Framework was put in place;
- (e) 2010/11: Legal Framework was put in place:- (i) Enacting of the Electronic & Postal Communications Act, 2010 (EPOCA)



Success Factors..Co'td

Consultation..Co'td

by the Parliament of Tanzania and its ascension by the President. EPOCA provides for DTT migration;

(ii) EPOCA (Digital and other Broadcasting Networks) Regulations, 2011 which provide for Analogue Switch Off (ASO) of 31st December, 2012, The Government through the NSC proposed ASO in phases to address challenges in faced in one service area while sticking to the 31st December, 2012 provision;

(f) 2010: Licensing through an open tender.



Success Factors..Co'td

2. Commutation Strategy

Communication is power. One of the key success factors was to identify and categorize the audience/ profiling for effective outreach:-

- 2010 TCRA formulated a Communications Strategy (CS) and submitted it to the Government for approval. The Government approved it;
- The CS provided for all communications outlets including print and electronic media (newspapers, tv/radio), roadshows, talkshows, meetings/seminars,



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Success Factors..Co'td

Communication Strategy..Co'td

jingles and songs(audio and visual) from ward to national level, tailor made for various age groups, various social spheres, government to private sector;

- 2011: The President of the United Republic of Tanzania launched the Public Awareness Campaign and the digital logo on 24th August, 2011 (Fig.2);

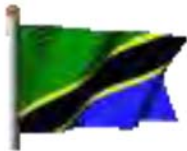


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DIGITAL LOGO





Success Factors..Co'td

3. Cost

- NSC considered recommendations from the NTC-DB on how to run DTT networks:-
 - (a) Financing: Public Private Partnership (PPP) for the public carrier (public broadcaster entered into a joint venture with a foreign company to build DTT infrastructure, played key role;
 - (b) Private participation:- Two additional carriers (2 MUX) totalling to 3 MUX granted the National Network Facilities Licence;



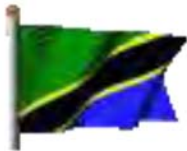
Success Factors..Co'td

- (c) Government exempted import duty on STBs, rendering affordability.

4 Consumers

Consumers are integral part of the digital migration. Addressing consumer issues depicts successful transition. Key factors addressed:-

- STBs affordability by tax exemption;
- Customer care including toll free telephone lines by service providers for technical support;



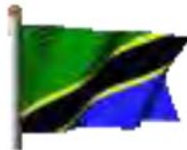
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Success Factors..Co'td

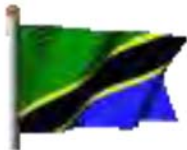
Consumers..Co'td

- There are more than 300 STBs distribution centres;
- Consumer Consultative Council very active on mobilizing consumers to get feedback;
- Quality of Service (QoS) and Quality of Experience (QoE) assurance by the Regulator;
- Consumers' unwillingness to voluntary digital uptake.



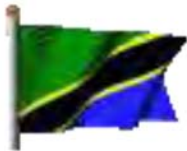
5 Challenges

- High costs of Simulcast Period: parallel running of DTT and analogue networks ; satellite capacity cost, utilities and human resource;
- Coordination with neighbours not yet switched-on;
- Inability by MUX to roll out countrywide;
- Signal coverage black spots due to un-even terrain/erected towers;
- Distribution of STBs was not steady in the beginning;
- Lack of consumer understanding of STB/antenna installation and use of remote control functionalities;



5 Challenges..Co'td

- MUX complications on Service Level Agreement (SLA) with Content Service Providers (CSPs);
- High transmission fees imposed by MUX to CSPs prior to ASO. TCRA intervened and established Cost Based Fee (CBF) charged my MUX to CSPs based on satellite (http://www.tcra.go.tz/consultative_docs/pcd_mux_cbf_2012.pdf). Further study ongoing to establish a model for the use of fibre optic National ICT backbone and retail last-mile connectivity;
- Few CSPs caught by surprise by switch off;

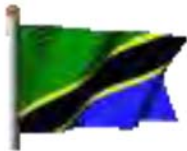


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5 Challenges..Co'td

- Attained only 22% population digital terrestrial penetration vs 24% analogue penetration;
- Over compression by MUX compromising QoS and QoE-Determination under technology dynamism;
- Importation of quality STBs;
- Regional and rural insertion to MUX's network.

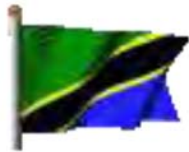


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5 Challenges..Co'td

- STBs inter-operability;
- Escalating piracy and copyright issues due to increased capacity and innovation within the DTT making it easy to copy, edit and manipulate works of others;
- STBs backward compatibility, presence of DVB-T and DVB-T2 in Tanzania;
- To liberalize STBs importation? Issue of quality? Control?.
- Local content thirst.



Lessons

- Success of digital migration based on practical experience in Tanzania depends on the following factors;
 - (a) Political will;
 - (b) Roadmap (SMART-Specific, Manageable, Attainable, Realistic and Time-bound);
 - (c) Regulatory instruments;
 - (d) Concerted Public Awareness Campaigns;
 - (e) Regular consultations with stakeholders;
 - (f) Resources (Financial muscle);

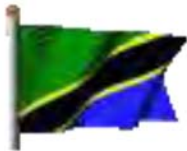


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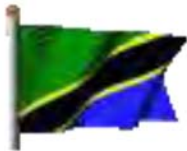
Lessons ..Co'td

- (f) DSO team (skills);
- (g) Champions (Head of State, Minister, Artists);
- (h) Operators goodwill;
- (i) Consumer willingness;



Conclusion

1. The phased ASO was executed on December 31st, 2012 starting with Dar Es Salaam (14 Tx sites) followed by and:-
 - Dodoma (6 Tx Sites) and Tanga (3 Tx sites) on 31st January, 2013;
 - Mwanza (6 Tx Sites) on 28th February, 2013;
 - Arusha (6) and Moshi (6) on 31st March, 2013;
 - Mbeya (4) on 30th April, 2013.



Conclusion..Co'td

2.Second phase of ASO will involve 13 Tx sites after availability of digital signal (**Morogoro, Kigoma**, Sumbawanga, Songea, Makambako, Iringa, Lindi, Mtwara, Musoma, Shinyanga, Tabora, Singida and Bukoba)

3.The target is to have fully digital switch-over by 2014 before the general elections in 2015.



Thank You

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