



Keynote address: What does the future hold for broadcasting in Africa?

**Professor H. Sama Nwana, Chief
Executive Officer, Atlantic Telecoms &
Media**



Atlantic T&M
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www.atlantic-tm.com

What does the future hold for ~~broadcasting~~ *Media* in Africa

**Keynote to Digital Broadcasting Switchover
Forum Africa
Arusha, Tanzania**

11th February 2014

Professor H Sama Nwana, Director

Atlantic Telecoms & Media

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Ex-Group Director, Ofcom UK

Key Messages

- **Digital SwitchOver (DSO) in Africa must be more than just technocracy and broadcasting...**
- **DSO is one of several important concurrent projects with major and important outcomes for the African continent**
- **Broadcasting challenges are many and complex: Broadcasting business case is challenging in most countries**
- **Looking TMT-sector wide is necessary in Africa: BSV vs. private value. Proceeds too from broadcasting spectrum may be part of the solution**



Overview

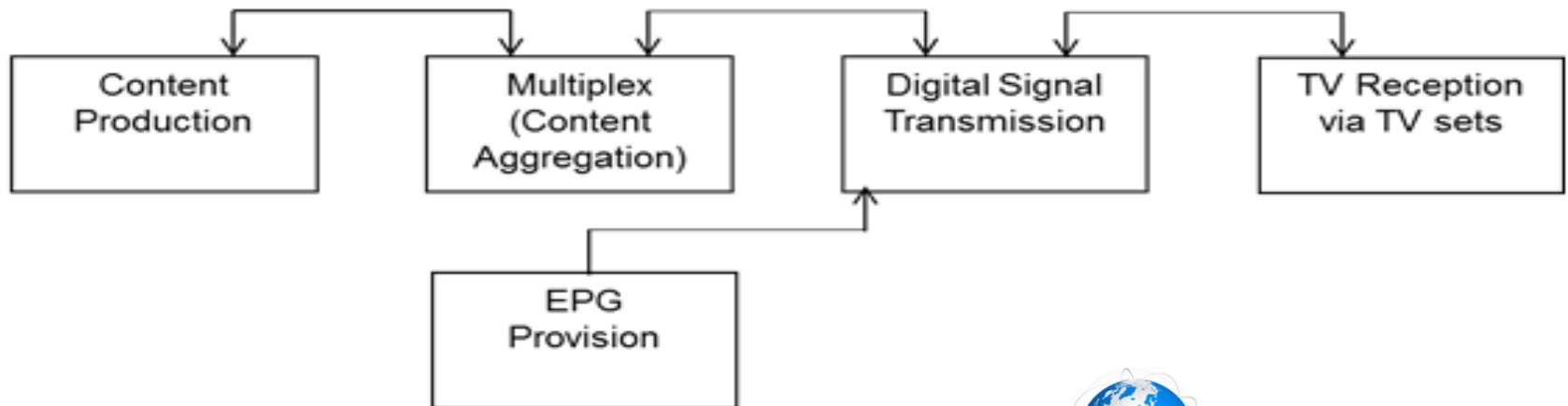
- Introduction: Digital switchover must be more than just techocracy and broadcasting...
- DSO is one of several ongoing and concurrent projects
- Broadcasting challenges are many and complex
- TMT must be looked at as a single sector going forward
- Annexe: Africa is a large continent mitigating against easy solutions



Digital switchover must be more than just technocracy..

"The analogue to digital switchover of TV should not just be an exercise in technocracy – it should and must be exploited as an opportunity to light the burners of the new multi-channel, multi-media, more interactive and more Social Media Sector."

Nwana (2014), Telecommunications, Media & technology for Developing Economies, London: Gigalen Press, Chapter 9



Moribund Media sector in Africa in 2014

- **But so much potential...**
 - Cities such as Dar es Salaam, Douala, Lagos, Cairo, Kinshasa, Nairobi, etc. are all potential TMT Media hubs in Africa of tomorrow
 - Nollywood is already a \$500M a year industry
 - TMT in London employs 440,000 or 1 in 10 jobs in the UK's capital: 40K Telecoms; 180K Technology; 210K Media
 - That is, 4 to 5 times as many Media jobs as telecoms
- **What are these jobs?** Broadcast engineers, Broadcast journalists, Film/video editors, Games developers, Graphics designers, Lighting technicians: broadcasting/film/video, Location managers, Production designers, theatre/television/films, Programme researchers: broadcasting/film/videos, Radio broadcast assistants, Radio producers, Runners: broadcasting/film/video, Sound technicians: broadcasting/film/video, Television camera operators: Television/broadcasting/film/video producer, Television floor managers, Television production assistants, Website (interactive) developers



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DSO is one of several ongoing and concurrent projects

- **Why DSO?**

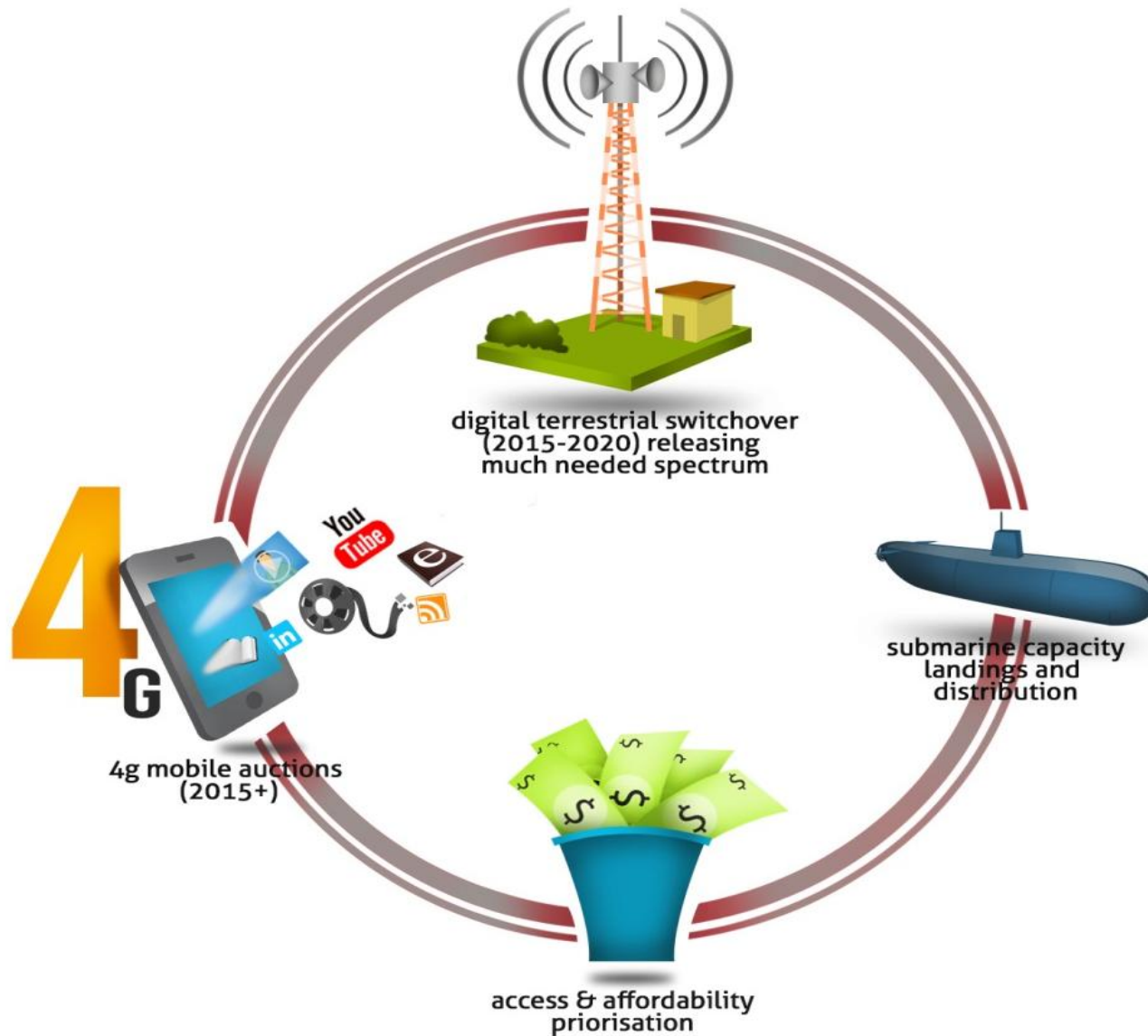
- Spectrum digital dividend
- Free up spectrum for digital TV (HD, SD), 4G mobile broadband, TVWS Rural broadband
- More media, interactive media and social media
- Jobs and GDP growth

- **Some real TMT desired outcomes that DSO helps enable:**

- Widespread availability of affordable mobile voice (including roaming intra-country and across the continent) for the masses (800Mhz, 900 Mhz)
- Widespread availability of affordable mobile data and mobile Internet (3G/4G) and otherwise (e.g. TV whitespaces) for rural parts, including mobile data roaming for the masses (700 Mhz, 500/600Mhz)
- Widespread availability of affordable radio (including community radio and temporary radio formats) and digital TV content (national and international news, comedy, drama, children, documentary for the masses) and newspapers
- ~~Better availability of affordable fixed line and fixed Internet~~
- Strong independent converged regulators (who work collectively and more formally too across the AU) and liberalised TMT sectors across the continent



TMT SECTOR REDESIGN FROM ALL THESE ACTIVITIES OR 'MUDDLE THROUGH' AS SEPARATE PROJECTS?



Source: *Telecommunications, Media and Technology (TMT) for Developing Economies*
by Prof H Sama Nwana



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Broadcasting/Media challenges are many and complex

- **Challenges include**

- The Future of Government-owned/State-owned broadcasters challenge
- The Re-inventing public service broadcasting challenge
- The Public service news challenge
- The ~~broadcasting~~ media sector regulatory challenge
- The Financing/funding challenge (SABC 2011 audited – 76% advertising/sponsorship; license fees 17%; Government grant 3%)
- The newspapers/press challenge
- The widespread availability (reach) challenge
- The affordability challenge
- The quality challenge
- The political challenge
- The institutional challenge
- The skills/knowledge/expertise challenge
- The technology challenge



True public service broadcasting is unlikely to have an investible business case in most countries

• The reality is..

- Broadcasting certainly not valued by consumers as much as mobile
- No form of TV news in the UK currently pays its own way – little chance in Africa
- Much of the value in broadcasting is in the broader social value (BSV) not private value.
- BSV covers: access and inclusion; more educated and informed citizenry; cultural understanding; belonging to a community; promoting democracy - but who wants to pay for these niceties?

• But a TMT business case and other instruments can help

- Cash rich telecoms can pay for cash poor media/broadcasting (the later which delivers significant BSV)
- Spectrum and auction receipts from 700MHz, 800Mhz can be hypothecated for media/broadcasting
- Creative legislation and regulation (coverage obligations, market structure, liberalisation, deregulation, etc
- More creative use of USFs for reach and affordability



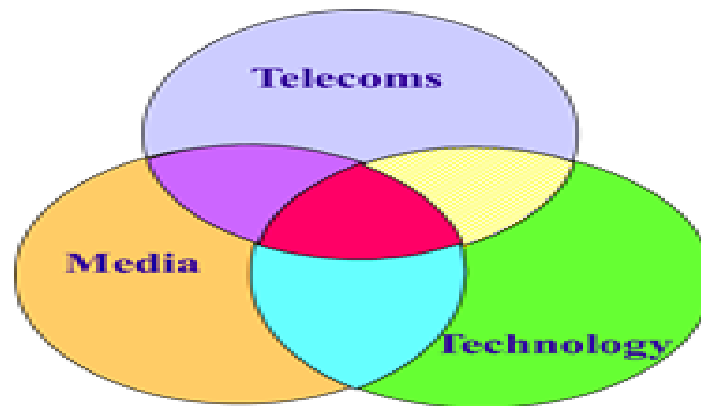
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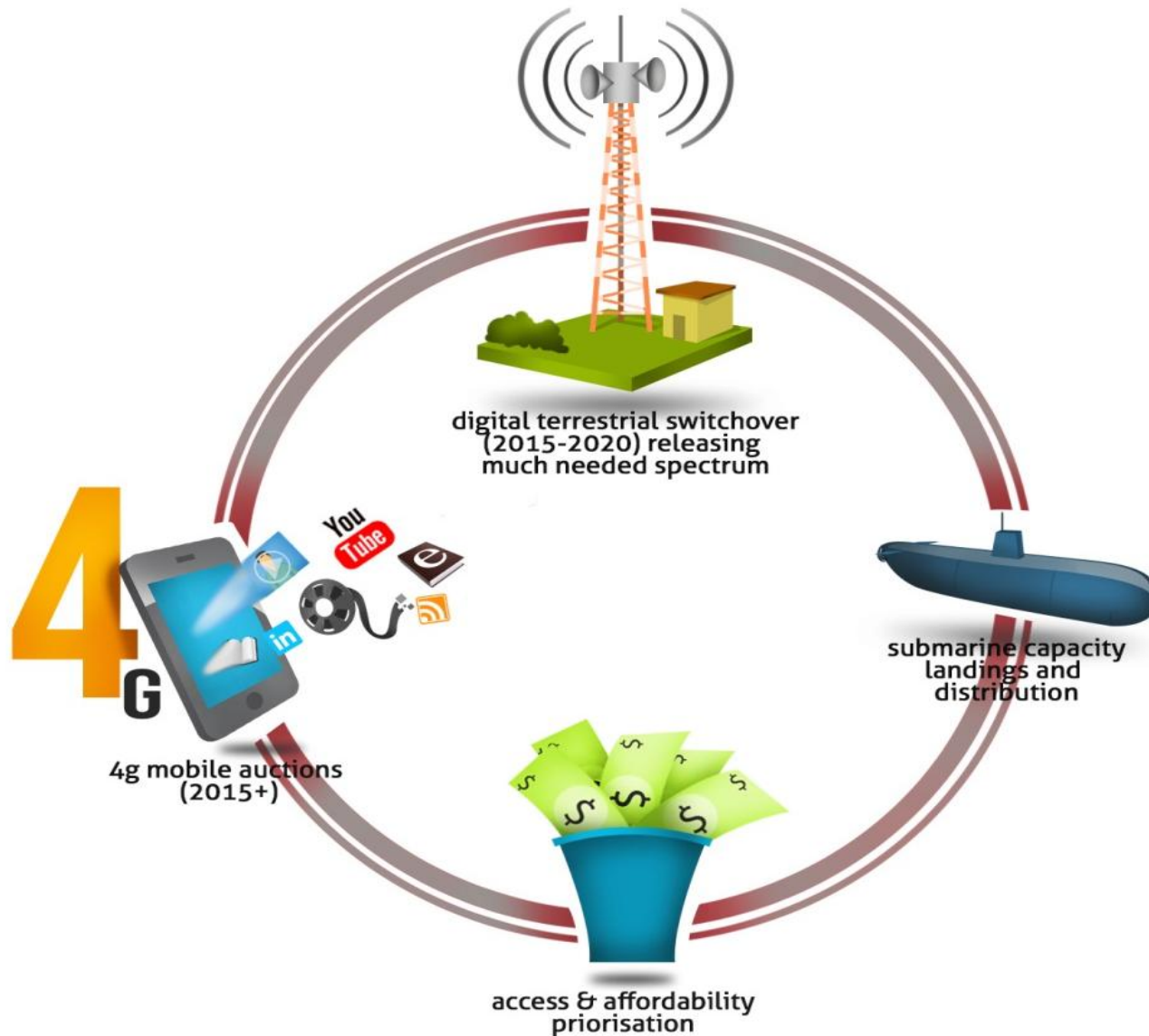
Telecommunications, Media and Technology (TMT) for Developing Economies

~ How to make TMT Improve Developing Economies in Africa and Elsewhere for the 2020s ~

Professor H Sama Nwana
DRAFT 1.0



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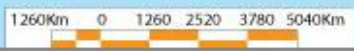
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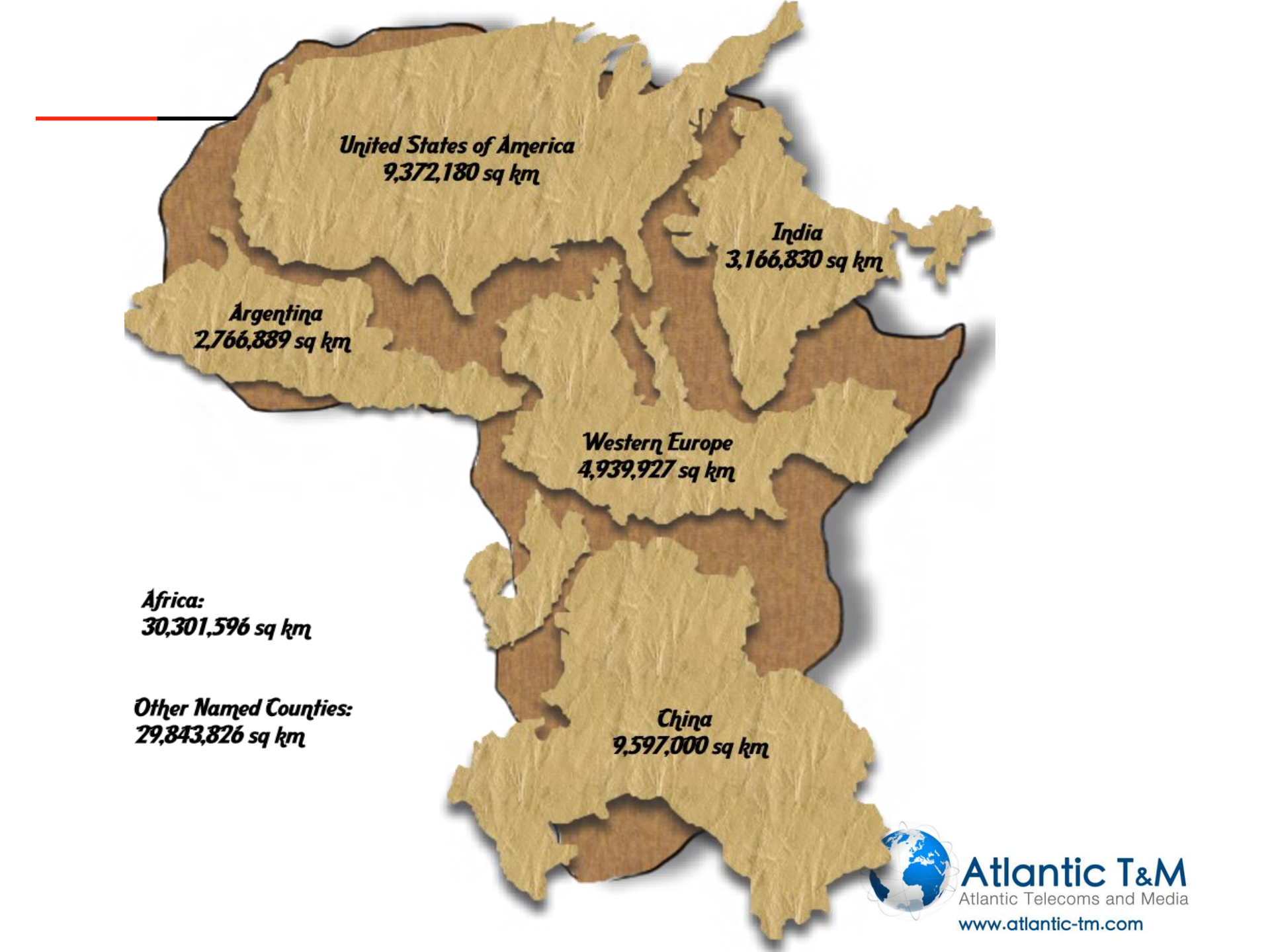
Map of the World - Click on any Country for its Map & Information

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WORLD MAP



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United States of America
9,372,180 sq km

India
3,166,830 sq km

Argentina
2,766,889 sq km

Western Europe
4,939,927 sq km

Africa:
30,301,596 sq km

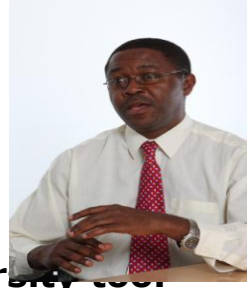
Other Named Countries:
29,843,826 sq km

China
9,597,000 sq km



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On the speaker (get in touch at www.atlantic-tm.com)



- ✓ **Professor H Sama Nwana – CEO of Atlantic Telecoms & Media, a consulting firm**
- ✓ **Visiting Professor to Brunel University, West London. Professor at Bristol University, 2007-2011. Hails from Cameroon, West Africa.**
- ✓ **Just concluded 4 years as Group Director, Spectrum, - and Member of Executive Board of Ofcom; Member of Ofcom Policy Executive at UK Regulator**
- ✓ **H has just completed leading the auction of UK 4G auction which raised £2.37 Billion in February 2013**
- ✓ **Previously Managing Director at Arqiva (UK's broadcast transmission & infrastructure provider) – £220M P/L**
- ✓ **Previously Executive Director at Quadriga where he was credited with turning around the fortunes of this £75M European company.**
- ✓ **Holds an MA from Queen's College Cambridge, a PhD and MSc (Dist) from Aston University, BSc. from University of Birmingham and an MBA (with Distinction) from London Business School.**
- ✓ **Also worked for British Telecom Plc and taught at the Universities of Liverpool, Keele and Calgary (Canada).**
- ✓ **H was Senior Responsible Officer (SRO) for the 61/62 DSO Clearance Programme – and played a significant role in the Digital Switchover process in the UK**
- ✓ **H is also on the Advisory Panel (Regulatory) of the Commonwealth Telecommunications Organisation, based in London. Prof at AUN, Yola, Nigeria**
- ✓ **H has completed a book: TMT for Developing Economies: How to make TMT improve Developing Economies in Africa & Emerging Markets for the 2020s**

