

DIGITAL MIGRATION
THE KENYAN EXPERIENCE
Communications Authority of Kenya

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THE LEGAL & INSTITUTIONAL FRAMEWORK

- Communications Authority,(CA) is the converged ICT Regulator in Kenya
- Prevailing Legal framework was adequate for digital migration. No additional law needed
- Prevailing ICT Policy statement already reflected the digital migration element, and the KICA Act allowed the Minister responsible for ICT to issue a policy of General nature such as the Analogue Switch Off (ASO) roadmap.

ANALOG TV BROADCAST FRAMEWORK

- In analogue TV, broadcaster responsible for both content and infrastructure
- Frequencies assigned to broadcaster
- At the beginning of the simulcast period, the Analog TV signal population coverage stood at 58%.

DIGITAL MIGRATION TASKFORCE

- Digital Migration Taskforce set up in 2007 developed a frame work for the migration process
- Main Recommendations:
 - Establishment of the Digital Transition Committee (DTC) to manage and oversee the migration following recommendations of the Taskforce
 - Signal distributors to roll out digital platform
 - Analogue Switch-Off (ASO) timelines

DIGITAL MIGRATION STRATEGY

- Initial Strategy - Government funded public signal distributor during simulcast
- Implementation - Consultative process spearheaded by Government
- DTC - Multi-stakeholder Committee that included government, regulator, broadcasters, signal distributors, set top box vendors and consumer association groups

LICENSING OF BSDs

- The first authorised BSD is government owned SIGNET
- The second BSD licence issued to Pan African Network Group (PANG) after a competitive bidding process
- Each BSD assigned a minimum of three multiplex frequencies for each Broadcast area, countrywide

LICENSING OF TV CONTENT PROVIDERS

- The broadcasters only need a licence for the content aspect since the signal distributor provides the infrastructure.
- The licensing process is on first come first serve basis and once authorized, the broadcaster (content provider) enters into a commercial agreement with the signal distributor for their channel to be carried.
- The TV Content can be broadcasted countrywide or in specific broadcast area, as the BSD can undertake local insertion of the signal

DIGITAL TV STANDARDS

- DTTB Service launched on DVB-T in December 2009.
- In 2010, Kenya adopted DVB-T2 and MPEG-4 AVC standard for digital terrestrial television broadcasting (DTTB) to fully benefit from the spectrum efficiency gain and services flexibilities associated with DVB-T2.
- Digital TV was planned in bands IV/V (470-806 MHz) but arising from the decision of WRC-12, re-planning was carried out through ATU and ITU-R collaboration covering only channels 21-48(470-694 MHz).

FREQUENCY PLANNING FOR DIGITAL TV

- Deployment of DTT is on mini Single Frequency Network (SFN) within a Multiple Frequency Network (MFN) plan while analog TV Freq. plan was based on MFN plan.
- BSDs who wish to deploy the multiple SFN transmitters in a given service area on the same frequency have to submit their configuration for approval.
- Current deployment is a hybrid of MFN with mini-SFNs

DIGITAL TV MIGRATION CHALLENGES

- Litigation challenges from broadcasters due to the transformation of the market that was bound to affect their business model.
- Availability and affordability of set top boxes. Several STB subsidy models considered. Import tax waiver effected in collaboration with EAC countries
- Digital Network rollout due to uncertainty resulting from litigation and inadequate funding for public BSD.
- Misinformation of the general public with regard to the digital TV migration process and set top boxes options (FTA vs. Pay)

MITIGATION OF CHALLENGES

- CA developed minimum STB specs
- Affordability/availability of compliant Set top boxes
 - minimum specs, Announcement of analogue switch off dates, duty waiver, open market, track uptake of set top boxes
- Government ability to fund digital migration vis a vis other priorities. – additional signal distributor licenced
- Legal challenges – Consultative approach

MITIGATION OF CHALLENGES

- Demonstrate that the benefits of digital migration outweigh the challenges.
- Regulation of tariffs BSDs charge broadcasters on the digital platform. Set maximum limits.
- Service Level Agreements (SLA) Guidelines- ensure quality by Signal Distributors and broadcasters
- Effective Consumer awareness using different platforms to educate and inform public

POLICY & REGULATORY INITIATIVES TO SUPPORT MIGRATION

- The Government waived of import duty (accounting for about 25%) on STBs to make them more affordable.
- Reduced type approval fee for set top boxes (STBs) by factor of 5 (from Kshs 20,000 to Kshs 4,000).
- Revised the minimum specifications for STBs making the Conditional Access feature optional for STBs intended for free to air (FTA) use.
- Liberalized the supply of Set Top Boxes to allow more players into the market.
- Frequency fees for gap fillers reduced

CONSUMER AWARENESS CAMPAIGN

- DigitalKenya” is the brand associated with digital migration process in Kenya.
- Consumer awareness campaign under the slogan ***‘join the great digital migration’*** was unveiled using the print, radio/TV media and roadshows. Later added **‘Tunatoka analogue, Tunaenda digital’**
- Other strategies included TV and Radio talk-shows and social media
- Dedicated website www.digitalkenya.go.ke and a dedicated team to respond to public queries

ANALOGUE SWITCH OFF DEADLINES

Phased Approach to ASO adopted:

- Nairobi and its environs - 31st December 2014.- completed
- 14 major towns – 2nd February 2015 - completed.
- Remaining 11 remote analogue sites – 30th March 2015.-targeted to be on air before 30th June 2015, currently under implementation

STATUS OF THE DIGITAL TV SIGNAL COVERAGE

- Coverage of the digital TV has matched the areas previously covered by the analogue signal and stands at over 58% of the population coverage.
- The Digital Terrestrial Transmission (DTT) infrastructure rollout by the two licensed Signal Distributors i.e SIGNET and Pan Africa Network Group (PANG), is still ongoing until the entire country is covered.
- The option of coverage of remote sparsely populated areas using satellite FTA platform under consideration

STATUS OF DTT IMPLEMENTATION

- Two BSDs operational.
- Two DTT Pay TV providers
- 55 free to air channels on DTT
- DTT coverage replicates analogue TV coverage
- Over 70 vendors and over 100 models of set top boxes approved
- Over 2million set top boxes sold
- DTT coverage –about 58% of the population

REGIONAL COORDINATION & HARMONIZATION

- Kenya had five cross-border coordination meetings with the neighbouring countries since WRC-12
- Kenya has been attending relevant study groups that have informed the national position regarding Agenda Item 1.1 and 1.2 of WRC 2015 which in turn has informed position taken at the regional coordination meetings

DIGITAL DIVIDEND

- Kenya has identified both DD1 (800 MHz) and DD2 (700 MHz) for wireless broadband but is awaiting the decision of WRC-15 to finalize the actual channel arrangement for both bands.
- The process of second digital dividend has also began where all analog TV have been switched – off and no digital TV assignment has been made above CH 48 as we await the outcome of WRC-15 regarding A.I 1.2

DIGITAL DIVIDEND -ALLOCATION

- Kenya Issued a 2 x 15 MHz block in the 800 MHz DD1 spectrum through a first-come first-serve basis and might issue the remaining spectrum using the same method or an auction, Beauty contest or a mix
- Coverage obligations: Country wide coverage within 3 years
- spectrum fees: USD 56.25 Million was paid for a 2x15MHz spectrum block that has so far been issued

- **Adequate Regulatory framework**
- **Consultative Approach – involve all stakeholders**
- **Analogue Switch Off (ASO) Roadmap**
- **Affordability/Availability of Set top boxes**
- **Demonstrate that opportunities outweigh the challenges of digital migration**
- **Effective Consumer awareness**

THANK YOU