



Republic of Zambia

Ministry of Information and Broadcasting Services

Digital Migration Policy

February 2014

Foreword

The evolution of technology is and will continue to play an important role in the advancement of the economic and social wellbeing of the Zambian people. Given this scenario, it is important that the policy frameworks supporting the management and regulations of unfolding technologies are forward-looking and responsive to the changing times.

History tells us that television services in Zambia began in 1961 on the Copperbelt Province to cater for the expatriate community working in the mining industry and subsequently spread to other parts of the country. In 1977, Zambia joined the rest of the world in the introduction of colour television to keep pace with the World's technological advancement to enhance quality access to information.

Access to information is, therefore, key to accelerating development in order to attain the Millennium Development Goals (MDGs). The advent of digital television broadcasting will further improve access to information.

To this effect, the migration from analogue to digital television broadcasting is inevitable. Digital migration will allow for efficient utilisation of radio frequency spectrum. This in turn will release frequencies in the broadcasting bands for other Information Communication Technology (ICT) services in addition to value added broadcasting services such as 3D televisions and many others.

This Digital Migration Policy, therefore, sets the guidelines of migrating Zambia's broadcasting sector from analogue to digital terrestrial broadcasting. The country is working to switch off analogue broadcasting television transmission on 31st December 2014 in time to meet the International Telecommunications Union's (ITU) deadline of 17th June 2015, when all countries in Africa and Europe (Region 1) are expected to have migrated to digital terrestrial broadcasting. The time to migrate to digital broadcasting technologies is here with us and hence we have to embrace it as a major step in improving our people's lives. This policy is a bold step in our quest to achieve that goal. I, therefore, appeal to members of the public to support the implementation of this policy to enable a smooth transition to meet our analogue switch off date.

Hon. Mwansa Kapeya, MP.

Minister of Information and Broadcasting Services

Acknowledgements

The preparation of this Digital Migration Policy and the process going forward was and is still based on a consultative approach involving all major stakeholders. Without any reservations, our humble appreciations are extended to all stakeholders who have taken part and still continue to take part in the policy formulation and implementation process. These include representatives from the following institutions.

- Cabinet and Cabinet office;
- Electronic media houses;
- Mobile service providers;
- Professional and business associations
- Local and international institutions dealing with different aspects of television broadcasting.

My special tribute goes to the members of the Digital Migration Task Force who individually and collectively worked tirelessly to prepare this policy document.

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Permanent Secretary
Ministry of Information and Broadcasting Services

Working Definitions

In this Policy, the following definitions shall apply:

Broadcasting	Means a service by radio waves in which the transmissions are intended for direct reception by the general public and encompasses audio, video or other types of transmissions.
Content Service Provider	a service provider on a digital broadcasting platform who develops and/ or aggregates content offering whether it is in the form of an audio or video or data service and delivers it to a signal distributor for broadcasting.
Content Services	means Services offered for sound, data, text or images whether still or moving except where transmitted on private communication.
Digital Terrestrial Television	means broadcasting system using digital technology entirely over earthbound circuits.
Digital dividends	spectrum which is released in the process of digital television transition
Migration	means the process of change or switchover from analogue to digital broadcasting.
Multiplex	is a digital transmission channel which combines programme material and other data in a digital form for transmission via a frequency channel. The process of digital combination of the signals is called multiplexing.
Set Top Box	means a converter of digital signal to analogue signal
Simulcast Period	means that period from which analogue services are going to run concurrently with digital services.
Spectrum	means the range of all possible frequencies of electromagnetic radiation used for radio communication
3DTV	is television that conveys depth perception to the viewer by employing techniques such as telescopic and multi-view display, 2D-plus-depth, or any other form of 3D display.
National Technical Standard	it is a standard adopted through the process as per Zambia Bureau of standards act and or adopted by Zambia through regional and international treaties.
Political office	For purposes of this Policy includes; political parties, organizations affiliated with political parties and an individual holding political office in a political party.

Acronyms

DAB	Digital Audio Broadcasting
DRM	Digital Radio Mondiale
DTH	Direct To Home
DTT	Digital Terrestrial Television
DTV	Digital Television
DVB – T	Digital Video Broadcasting – Terrestrial
DVB – T2	Digital Video Broadcasting – Terrestrial Second Generation
DVB-C	Digital Video Broadcasting - Cable
DVB-H	Digital Video Broadcasting - Handheld
DVB-S	Digital Video Broadcasting – Satellite
HDTV	High Definition Television
IBOC	In-band on-channel
ICTs	Information and Communication Technologies
iDTV	Integrated Digital Television
IPTV	Internet Protocol Television
ITU	International Telecommunication Union
MPEG4	Motion Pictures Expert Group Video Compression Standard 4
RRC-06	Regional Radio Communication Conference of 2006
STBs	Set Top Boxes
UHF	Ultra High Frequency
VHF	Very High Frequency
ZICTA	Zambia Information and Communications Technology Authority
ZNBC	Zambia National Broadcasting Corporation

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1 Introduction

Broadcasting is undergoing a revolution that will affect both traditional broadcasting and other medium of information dissemination. The transition from analogue to digital broadcasting spurred by convergence is creating great opportunities for the provision of Information and Communication Technologies (ICTs) applications and multimedia services. Digital broadcasting is going to contribute to the efficient use of spectrum and paving way for a “digital dividend”, because the released spectrum will be used for wireless broadband communications and other applications.

The digital technologies are facilitating increased convergence between the traditionally separate businesses of broadcasting, telecommunications and the Internet. In contrast to analogue, digitalization has made it possible for different types of content (audio, video, text) to be stored in the same format and delivered through a wide variety of technologies (computers, mobile phones, televisions, etc.).

The global trend of migrating from analogue broadcasting technologies to digital broadcasting technologies will mean that both broadcasting and telecommunications infrastructures will be used to achieve countrywide coverage for broadcasting services. The main purpose of the migration process is to ensure that all broadcasting services that are delivered through analogue technologies are fully replicated on the digital broadcasting technologies with the aim of switching off the analogue broadcasting services at a specific point in time.

Digital migration arose from the Regional Radio Communication Conference of 2006 (RRC06) and the subsequent Geneva 2006 Agreement (GE06) of the International Telecommunication Union (ITU) which resolved that all countries in Region 1 (Europe and Africa) signatory to the agreement must migrate by 17 June 2015.

This policy sets out guidelines for seamless transition from analogue to digital and ensures that Zambia meets the ITU deadline of 17th June 2015.

2 Situational Analysis

2.1 History of Television Broadcasting in Zambia

The introduction of television broadcasting services in Zambia started in 1961 on the Copperbelt Province targeted at the mining expatriates only. Later in 1965, it was extended to Lusaka and coverage has been expanding ever since to about 80% of country’s population in 2012. The current terrestrial television

broadcasting services are based on analogue technology.

Until the early 1990s when the broadcasting sector was liberalized, broadcasting services were a sole monopoly of the Government. However, since the liberalization policy was put in place, there has been tremendous growth and development in the country's broadcasting sub-sector.

2.2 Status of Broadcasting

Analogue television broadcasting services in Zambia are offered in bands III (174-230MHz), IV (470-582MHz) and V(614-854MHz) in accordance with the ITU Geneva 1989 (GE-89) and Stockholm 1969 (ST-69) broadcasting plans. Currently, the television signals from ZNBC, Muvi Television and Mobi Television are transmitted in the VHF band, while Trinity Broadcasting Network (TBN), ZNBC TV2 and some rural ZNBC sites use UHF band.

After 1990, the Government liberalised the airwaves and this has seen the number of broadcasters both radio and television increase from one (ZNBC) to 63 (7 television broadcasters and 56 radio broadcasters) at the moment. The nine(9) television broadcasters include ZNBC, MultiChoice, MyTV (Strong Technologies), Mobi TV, Muvi TV, CBC Television, Prime TV, Chipata TV, North-West TV, and TBN. Multichoice Zambia and MyTV provide satellite subscription TV while the rest are terrestrial.

The private broadcasters have setup their own infrastructure and sites alongside the infrastructure owned by ZNBC to host their transmission systems. As at the end of 2012, ZNBC had 67 transmitters, Muvi TV had 3, TBN had 3, and the rest had one transmitter each.

2.3 Broadcasting Market Structure and Legal Framework

To regulate the sector, Parliament passed the Independent Broadcasting Authority (IBA) Act No. 17 of 2002, which provides for the registration of broadcasting stations and regulation of their content.

The broadcasting licenses are issued under the IBA Act while the frequency licenses are issued by the Zambia Information and Communication Technology Authority (ZICTA) under the Information and Communication Technologies (ICT) Act No. 15 of 2009.

Therefore, the current broadcasting licensing mechanism is a two-stage process involving the two regulators. The licenses to prospective broadcasters specify the type of broadcasting service (TV and/or radio) and the permitted coverage areas.

2.4 Global Trends in the Broadcasting Sector

There are numerous forms of technological convergence that are taking place arising from the advancement in ICTs. It is now common to use the same ICT infrastructure for telecommunications, multimedia information provision, broadcasting (radio and television) and computing. As a result, many countries are restructuring their policies and regulation frameworks to create a single regulatory framework dealing with convergence of ICTs.

3 Vision

The vision of the Government is to develop an Information and Media industry capable of bringing about a well-informed citizenry, motivated to embrace democratic governance, national development and promote continued access to diverse information after migration

4 Rationale

Digital migration arises from of the Regional Radio Communication Conference of 2006 (RRC06) and the subsequent Geneva 2006 Agreement (GE06) of the International Telecommunication Union (ITU) 'Recommendations' which resolved that all countries including Zambia which is a signatory to the agreement must migrate from analogue to digital broadcasting services by 17th June, 2015.

4.1 Importance of Digital Migration

Under the current analogue terrestrial television, one frequency carries one program channel, whereas Digital Terrestrial Television (DTT) uses one frequency to carry multiple program channels thereby allowing for transmission of many television programs using fewer frequencies and at a lower cost.

4.2 Generic Benefits of Digital Migration

The purpose of this policy is to ensure that migration from analogue to digital benefits the people and leads to more services and broader coverage

Digital broadcasting enables utilisation of the scarce frequency spectrum far more efficiently than analogue technologies and therefore the first benefit of digital migration is the freeing up of valuable radio frequency spectrum that is currently used for analogue television transmission. The freed up spectrum could be used for other services (digital dividends).

One of the sectors identified by Government as having potential to contribute to economic growth and job creation is the ICT sector. Hence increasing access to information and ICTs services through infrastructure roll-out will definitely help in reducing the cost of doing business, promote small business development (entrepreneurship) and enhance job creation. Access to government information and services, is fundamentally important in poverty eradication efforts. Through the effective application and use of ICTs by government (e-government), opportunities such as the efficient management of information to the citizens and better service delivery are created.

The migration to digital broadcasting will also create opportunities for the development, use and wide dissemination of local content. It will advance the expression and the efficient communication of the knowledge and experience of all communities and the country as a whole. The creation and use of local content will contribute to the integration of people from all walks of life.

Digital broadcasting will require a concerted effort to increase the pace of generating digital content to utilise the excess capacity to be generated upon migration. The development of digital local content will spur the development of the creative industries and promote job creation.

4.3 Technical Benefits of Digital Broadcasting

Digital broadcasting presents the country with a unique opportunity to efficiently use the frequency spectrum. This will allow for different content service providers to be carried in a single frequency channel. The digital broadcasting platform also offers superior video and audio quality.

The other benefit is that digital broadcasting lowers transmission costs due to the fact that less power is consumed by the transmitter as compared to analogue. The digital transmission infrastructure will allow for optimal utilisation since broadcasters will share the same infrastructure. In addition, the digital environment will stimulate an increased participation in the broadcasting sector resulting from high demand for content and low investment start-up cost.

Digital broadcasting will have a positive impact on the environment due to reduced construction of broadcasting transmission infrastructure.

5 Guiding Principles

The key guiding principle on which this policy has been developed is the commitment by the Government to facilitate a smooth and cost effective digital migration.

Specifically the following are the guiding principles:

- a) Citizen participation
- b) Access to information
- c) National empowerment
- d) Promotion of competition
- e) Liberalized airwaves
- f) Respect of rule of law

6 Policy Objectives

The main aim of this policy is to ensure that information becomes universally accessible across the country through broadcasting. It is the intention of Government to have a well-coordinated, effectively managed digital migration process that is responsive to the diverse information needs of the public. The following are the objectives:

- a) To develop digital broadcasting market structure and licensing framework
- b) To define national technical standards in order to ensure interoperability, economies of scale and safeguarding universal services.
- c) To provide a framework for content development and regulation in order to promote diversity and create jobs.
- d) To develop and provide guidelines for the establishment and operation of signal distributors.
- e) To facilitate public consultation and awareness and provide mechanism for consumer protection.
- f) To provide a timeframe and schedule of digital transition in order to undertake orderly switch over and switch-off.

7 Policy Measures

In order to achieve the objectives set out in this policy framework, Government shall institute the following policy measures:

7.1 Digital Broadcasting Environment

The broadcasting environment shall be reviewed to reflect the new realities of digital broadcasting. To implement this measure, Government shall:

- a) Review the frequency licenses and revoke all analogue frequencies by switch off date and allocate frequencies only to signal distributor(s)
- b) Develop signal distributor and content service provider regulations
- c) Review the operations of ZNBC as a public broadcaster in line with the new business model in the digital environment.
- d) Ensure that the private signal distributors have a minimum 40% of controlling shareholding held by Zambian citizens
- e) Ensure that content service provider licenses are issued to Zambian citizens or to companies in which a minimum of 75% shares are owned by Zambian citizens
- f) Ensure that regulators develop and implement tariff and universal access guidelines by switch-on date
- g) Facilitate the establishment of a public signal distributor and promote through competitive mechanisms, the establishment of private signal distributors
- h) Require signal distributors to adopt common technologies for devices to be used by the public to access their services
- i) Ensure that appropriate duties and charges are effected on all imported content.
- j) Ensure local media production houses are promoted to increase local content

7.2 National Technical Standards for Transmission and Compression

The policy promotes the adoption of common technical standards and ensures consumer protection. To achieve this, Government has adopted the following standards:

- a) DVB-T2 as the transmission standard for terrestrial.
- b) DVB-S2 and DVB-H as standards for satellite broadcasting and mobile TV respectively;

- c) IBOC system as the FM digital sound broadcast format, and DRM for Medium and Shortwave radio broadcast,
- d) DVB-C as the standard for cable transmission
- e) MPEG-4 as the compression standard

7.3 Market Structure and Licensing Framework

The current broadcasting licensing framework shall be transformed into two broad licensing categories namely; content service provider licence and signal distributor licence. In addition no single entity shall hold both types of licenses at the same time.

These licenses shall not be issued to political parties, organizations affiliated to political parties and an individual holding political office.

7.3.1 Content Service Provision

Content Service Provision shall be undertaken by Content Service Providers. Their main role shall be to develop and aggregate broadcasting content and send it for dissemination by the signal distributor. The content service provider will ensure that content is delivered to the signal distributor and that the content meets the compression standard (MPEG-4) as prescribed in this policy. Under this category the following licenses shall apply:

- a) **National Public Content Service Provider** - This service will be provided by the Zambia National Broadcasting Corporation, operating commercially, with universal service obligations, and with public fund support to sustain its universal service obligations. The license shall be for a period of ten years.
- b) **Private Commercial Content Service Provider** - Private Content Service Providers will be expected to provide a diversity of programming content, contribute to job creation and human resource development. The license shall be for a period of ten years and can be issued as a National, Provincial or District license. This licence shall have two broad categories:
 - i.) Free-to- Air television broadcasting services capable of being received without the payment of a subscription fee.
 - ii.) Subscription television broadcasting services provided in exchange for the payment of a subscription fee.
- c) **Private Non-Commercial Content Service Provider** - This license shall be issued to a non-profit entity. The license

shall be for a period of ten years and can be issued as a National, Provincial or District license.

7.3.2 Signal Distribution

Signal distribution shall be undertaken by signal distributors. These entities shall provide network infrastructure that will receive content after aggregation from broadcasters for multiplexing and signal distribution and provide Subscriber Management System (SMS). The signal distributors will be required to provide up to five(5) free-to-air program channels for public service and shall be required to establish and operate help desks. Each signal distributor shall be required to develop service level agreements with Content Service Providers which shall be non-discriminatory. Under this category the following licenses shall apply:

- a) **Public Signal Distributor** –The signal distributor shall be required to provide national-wide coverage and services to Content Service Providers (licensees) on a non-discriminatory basis in order to provide universal access.
- b) **Private Signal Distributor** – The Signal Distributor shall be required to provide national-wide coverage and service to Content Service Providers (licensees) on a competitive and non-discriminatory basis. The private signal distributor shall be established through competitive open tender.

7.4 Digital Terrestrial Television Set Top Boxes and Consumer Protection

Government shall ensure protection of the consumer and guarantee access to information. To implement this measure, the Government shall:

- a) Require the regulator for signal distributors to develop mechanism to ensure compliance to type-approval standards for Zambia on Set Top Boxes (STBs).
- b) Require that a STB dealer is licensed to trade in Zambia and registered with the regulator and trades in type approved STBs.
- c) Require that all STBs manufactured locally or imported must be type approved.
- d) Require STB dealers to establish wide sale points for STBs and ensure the consumers acquire STBs at a competitive and fair price.
- e) Ensure that free-to-air program channels are accessible

on all STBs across signal distributors

- f) Ensure availability of affordable STBs by providing fiscal incentives on importation and manufacture of the STBs and integrated digital televisions.
- g) Promote consumer awareness on access and utilisation of STBs and digital broadcasting systems in general
- h) Ensure that mechanisms are in place to provide STBs to the underprivileged.

7.5 Content Development and Regulation

The Government shall ensure that local content development is enhanced and well regulated. To implement this measure, the Government shall:

- a) Ensure that the content and the operations of Content Service Providers is regulated;
- b) Establish the Content Development Fund to finance local content development.
- c) Ensure that curricula in learning institutions is reviewed and new ones introduced to accelerate content development;
- d) Strengthen the copyright enforcement mechanisms;
- e) Ensure that a minimum of 35% of content delivered by Content Service Providers is local.
- f) Develop public museums, libraries, art centers, theatres and music venues to international standards to promote content development.
- g) Promote Research and Development (R&D) to enhance content development
- h) Promote conversion of public analogue content into digital format.

7.6 Environmental Protection and Management

Government shall ensure that the environment is protected during and after the transition period. The following measures shall be implemented:

- a) Require ZEMA, and other relevant regulators to collaborate and develop regulations to protect the environment and avoid technological dumping
- b) Promote infrastructure sharing through regulation
- c) Promote recycling of e-waste

- d) Ensure regulations are in place to stop importation of analogue television sets into Zambia

7.7 Human Resource Development

The Government and industry shall ensure that there is adequate human capacity development in relation to Digital Terrestrial Television (DTT).

The following measures shall therefore be taken:

- a) Facilitate the review of curriculum at tertiary and secondary education levels to incorporate issues of digital terrestrial television.
- b) Review the existing curricula in higher education institutions that deal with creative arts to enhance content development.
- c) Encourage refresher courses for technicians, producers and other media practitioners

7.8 Public and Stakeholder awareness

The Government shall ensure that there is public and stakeholder awareness to facilitate smooth migration to digital terrestrial television broadcasting platform.

8 Implementation Framework

Information is cross-cutting and therefore all line Ministries, other government agencies have a role to play in the implementation of the Policy. There is also a need to review the legal framework to ensure that the implementation of the policy is supported by the law.

8.1 Transition Arrangements

8.1.1 Switch On and Switch Off Timeframe

The Government shall adopt a phased approach to digital switch on and analogue switch-off. There shall be a simulcast or dual illumination period between the switch on and switch off at each phase. The signal distributors will be required to carry existing Content Service Providers' content at no cost during the simulcast period.

The following shall be the switch on deadlines:

- a) **Phase I: Line of rail** – switch on to digital TV shall be done by 31st September 2014,
- b) **Phase II: Provincial Centers** – Switch on to digital TV shall be

- done by 31st December 2014,
- c) **Phase III: Remote Sites** – Switch on to digital TV shall be done by 30th April, 2015.

8.1.2 Other Transitional Measures

The other transition measures shall be as follows:

- a) The current broadcasters with valid licenses shall be issued with Content Service Provider licenses up to the expiry date of their current licenses subject to appropriate fees.
- b) Content Services Provider licenses shall be issued by 31st December, 2014.
- c) The Signal Distributor License shall be issued after 30th September, 2014
- d) At the switch off date, the Content Service Provider shall be required to sign service level agreements and pay user fees to the signal distributor(s).

8.2 Institutional Arrangement

To implement this policy, the institutional framework shall be as follows:

8.2.1 Ministry of Information and Broadcasting Services

The Ministry shall be responsible for policy coordination and monitoring, on behalf of the central government. The Ministry shall be responsible for the establishment of the Public Signal Distributor. The Ministry shall also be responsible for public awareness and public relations on issues related to Digital Migration.

8.2.2 Ministry of Finance

The Ministry shall be responsible for mobilising financial resources required for infrastructure, equipment and operations of the public signal distributor and National Public Content Service Provider.

The Ministry shall also be responsible for implementation of other measures in the policy in line with its mandate

8.2.3 Relevant Regulators

The regulators shall perform their respective functions in line with their statutory functions as provided for in their constituent Acts. In particular IBA shall regulate content and Content Service Providers, ZICTA shall regulate Signal Distributors and frequencies and ZEMA shall be responsible for environment control issues.

8.2.4 Content Service Providers (Broadcasters)

These shall be responsible for migrating their equipment and facilities to meet the requirements of a digital environment. The content service providers shall also make their own arrangements to connect their facilities to the signal distributor.

8.2.5 Signal Distributors

The signal distributors shall be responsible for carriage of the signals received from the Content Service Provider, distribution of the signal to designated transmission sites, broadcast the signal in line with the Content Service Providers' license.

8.2.6 Media Industry and Professional Associations and/or Bodies

Government regards the non-governmental media associations and bodies as key stakeholders in the implementation of this Policy. In implementing this Policy, Government will ensure that associations and bodies are consulted on all issues that affect them and their members.

8.2.7 Education and Training Institutions

The role of these institutions is to provide quality and relevant training at different levels of education in creative arts, ICTs/electronic related skills and Mass Communication.

Government shall consult these stakeholders to review their curricular of the relevant courses to provide for skills required to support digital broadcasting.

8.2.8 Content Developers and Copyright Associations

This group of stakeholders shall be engaged and consulted to ensure that content development is enhanced to take advantage of the digital broadcasting environment where there is sufficient capacity to carry more content and program channels than the analogue platform. Intellectual property rights shall be enhanced and enforced for the creative industry in consultation with relevant bodies.

8.3 Legal Framework

This policy shall be implemented with the guidance of the Republican Constitution and international commitments which Zambia is party to. In addition, there are specific laws that shall constitute the legal framework as given below.

8.3.1 Specific laws

The following are the specific laws that will facilitate the successful implementation of the Policy:

- a) Zambia National Broadcasting Corporation Act Cap. 154 of the Laws of Zambia
- b) Copyright and Performance Rights Act Cap No. 44 of 1994 and No. 25 of 2010
- c) Theatres and Cinematography Exhibition Act Cap158
- d) Independent Broadcasting Authority Act Cap No.17 of 2002 and as amended in Act No. 26 of 2010
- e) Electronic Communications and Transactions Act No. 21 of 2009
- f) Information and Communication Technology Act No.15 of 2009

8.3.2 Legal Reforms

In order to provide for smooth implementation of the Policy, the following laws shall be reviewed:

- a) The Zambia National Broadcasting Corporation Cap 154 to provide for the creation of a National Public Content Service Provider separate from the Public Signal Distributor
- b) The Independent Broadcasting Authority Act No.17 of 2002 and as amended in Act No. 26 of 2010 to enhance content regulation in the digital broadcasting platform
- c) The Information and Communication Technology Act 2009 to provide for regulation of signal distribution and operation of signal distributors
- d) Electronic Communications and Transactions Act No. 21 of 2009

8.4 Resource Mobilisation

The implementation of the Digital Migration Policy will require financial and human resources. The Ministry of Information and Broadcasting Services will source financial resources from the Treasury.

Further, the Ministry of Information and Broadcasting Services in consultation with other line ministries and stakeholders will solicit for support for media in terms of capacity building from external co-operating partners.

The Ministry will encourage commercialisation of some operations of the National Public Content Service Provider to supplement government subvention.

8.5 Monitoring and Evaluation

The monitoring and evaluation of this Policy shall be done through

the Planning Department of the Ministry of Information and Broadcasting Services in conjunction with the Sectoral Advisory Group (SAG) and the Management Development and Policy Analysis and Coordination Divisions of Cabinet Office.