

French Digital TV Transition

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CONTEXT OF DIGITAL SWITCHOVER IN FRANCE

General figures

- Population: 65 million
- 2/3 of the French population receive TV services only by terrestrial antennas
- 5 free-to-air analogue TV services and 1 analogue pay-tv service (Canal+)
- About 3500 analogue broadcasting stations for the 3 biggest networks (covering around 98% of the population)
 - Among them, 110 main stations cover about 85% of the population
- In 2005, European Commission (EC) recommended to complete analogue switch-off in Europe **before 2012**

OVERVIEW OF DIGITAL TERRESTRIAL TV SERVICES

DTT multiplexes

- 6 multiplexes, 27 DTT services
- Local services and Public Service Broadcasting on the first multiplex
- Shuffle of free and paying services on the same multiplex
 - MPEG-2 for free SD services
 - MPEG-4 for HD free services and SD/HD pay-tv services
- Shuffle of SD and HD services on the same multiplex
- Standard used : DVB-T
- Final target: 1626 digital broadcasting stations covering at least 95% of the population

DTT multiplexes	R1	R2	R3	R4	R5	R6
Standard	DVB-T					
Dispatching MPEG-2 /MPEG-4	6MPEG-2 SD	6MPEG-2 SD	1 MPEG-4 HD 4MPEG-4 SD	1 MPEG-4 HD 1 MPEG-4 SD 3 MPEG-2 SD	3 MPEG-4 HD	3MPEG-4 SD 3 MPEG-2 SD
Structure	France 2	i>Télé	Canal+	M6	France 2 HD	TF1
	France 3	BFM TV	Canal+ Cinéma	W9		NRJ 12
	France 5	Direct 8	Canal+ Sport	NT1	TF1 HD	TMC
	ARTE	Gulli	Planète	Paris Première		LCI
	LCP/Sénat	Virgin 17	TPS Star	ARTEHD	M6 HD	Eurosport France
	local services ou F3	France 4				TF6

ORGANIZATION OF THE ANALOGUE SWITCH-OFF PROCESS

Parliament / Government

- Define the national plan for analog switch off and digital TV transition
- Define and fund 100% for the national help scheme and for switch -off national campaign
- Fund at 50% some of the Groupement (see below) expenses

Conseil supérieur de l'audiovisuel (CSA)

- Negotiate target frequencies with neighboring countries
- Define the national frequency plan
- Decide regions analogue switch-off dates
- Work out DTT coverage maps

Groupement d'intérêt public « France télé numérique »

- Carry out the information and communication campaign (national and regional campaigns)
- Manage the help scheme
- Drive analogue switch-off in each region



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tous au numérique!

ALLOCATION OF THE DIGITAL DIVIDEND

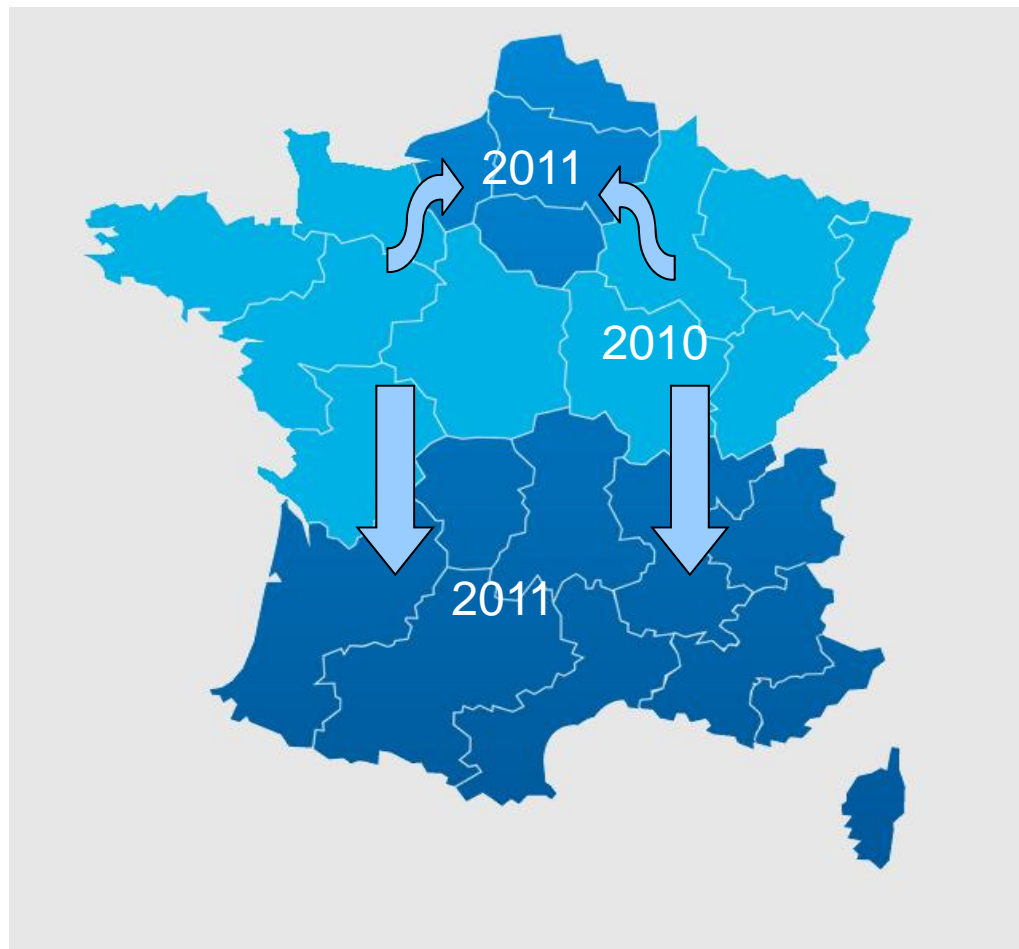
- Parliamentary ad hoc Commission worked on allocation of digital dividend
- According to the law, more **than half of the digital dividend** was allocated to Media Broadcasting services :
 - Target in UHF band (Bands IV & V):
 - 11 multiplexes for DTT services + 2 multiplexes for Mobile TV
 - Conversion of all TV services to High Definition
 - Free 790-862 MHz subband for Telecom services
 - VHF Band (Band III) dedicated to Digital radio services
- European Decision to free and harmonize the use of the 790-862 MHz Band
- This band was allocated to mobile services
- Workshops in progress to make communication and broadcast services work together around 790 MHz

ANALOG SWITCH-OFF SCHEDULE

- **Smooth process planned region by region** as defined by the national plan for analog switch-off
- **2009:** Experimental stage (3 zones)
 - Coulommiers (10 000 persons): February 2009
 - Kayzersberg (10 000 persons): May 2009
 - Nord-Cotentin (150 000 persons): November 2009
- **2010:**
Analogue Switch-Off (ASO) completed in 10 regions out of 24 (1/3 of the French population)
- **2011:**
Complete ASO by 30th of November 2011
14 regions (67% of the population) planned for 2011

COMPLETE ANALOGUE SWITCH-OFF SCHEDULE

<i>Nord-Cotentin</i>	18/11/09
<i>Alsace</i>	02/02/10
<i>Basse-Normandie</i>	09/03/10
<i>Pays-de-la-Loire</i>	18/05/10
<i>Bretagne</i>	08/06/10
<i>Champagne-Ardenne</i>	28/09/10
<i>Lorraine</i>	29/09/10
<i>Poitou-Charentes</i>	19/10/10
<i>Centre</i>	19/10/10
<i>Bourgogne</i>	16/11/10
<i>Franche-Comté</i>	16/11/10
<i>Haute-Normandie</i>	01/02/11
<i>Nord-Pas-de-Calais</i>	01/02/11
<i>Picardie</i>	02/02/11
<i>Île-de-France</i>	08/03/11
<i>Aquitaine</i>	29/03/11
<i>Limousin</i>	29/03/11
<i>Auvergne</i>	10/05/11
<i>Corse</i>	24/05/11
<i>Côte-d'Azur</i>	24/05/11
<i>Rhône-Alpes</i>	14/06/11
<i>Provence-Alpes</i>	05/07/11
<i>Alpes</i>	20/09/11
<i>Midi-Pyrénées</i>	08/11/11
<i>Languedoc-Roussillon</i>	29/11/11



COMMUNICATION PLAN

- **Media campaign**
 - National and Regional media
 - TV, radio, newspapers and magazines
- **Regional team**
 - Regional and local representatives
 - Technical representative in each region
- **Web site**
 - www.tousaunumerique.fr
- **Call Center**
 - National phone number : 0970 818 818 (local call pricing)
 - Regional phone numbers dedicated to local representatives
- **Neighborhood actions**
 - Information leaflets mailed to all households
 - Fixed and mobile information stands

NATIONAL HELP SCHEME

- **Entirely funded by Government**
- **Low income householders**
 - Depends on the income level
 - Pay for the purchase of DTT Set Top Box (25€ maximum)
 - Pay for upgrading or changing the antenna (120 € maximum)
- **Old (over 70 years old) and disabled people**
 - Free service including:
 - Plugging the Set Top Box to the TV
 - Channels scanning
- **Households out of DTT coverage**
 - For all residents of designated areas, with no consideration for income level
 - Pay for any technical solution (mostly satellite dish and Set Top Box) to receive the DTT services (250€ maximum)

FUNDING OF THE ASO PROCESS

- **The French Government agreed to provide up to 333 M€ for 2009-2011 period:**
 - **Ratio of around 5€ per person**
 - **Help Scheme entirely funded by Government (around 180M€+ around 50M€ for technical assistance)**
 - **National Media Campaign entirely funded by Government (20M€)**
 - **Regional and Local Media Campaign and General fees are shared fifty/fifty between Government and analogue TV services (110M€)**
- **Final expense should be significantly below this amount because help schemes are used far less than expected**

FEEDBACK AFTER A YEAR OF ASO

High level of prepared households (figures June 2010)

- DTT penetration reaches more than 80% of households
 - 85,8 % of householders catch DTT services (across all television platforms)
 - 56,5 % of householders have DTT receivers (terrestrial reception)
- Analog TV reception decreasing
 - 7,9 % of households still have analogue services as the main access to TV
 - 26,5 % of households have one of their TV sets not yet digitalized (mostly second and third TV set)

Good understanding of the process and its issues

- Good understanding of the ASO process
- Use of the help scheme mechanisms (assistance, pay back ...)
- High level of satisfied households

Key points to watch

- Interferences in zones where Single Frequency Networks are used
 - Rescan of Set Top boxes after the ASO including already digitalized households
- Improvements in the communication towards collective housing