DTT in Kenya: more content, more jobs and a digital dividend

Planning for the analogue-to-digital television migration in Kenya began in 2006, immediately after the GE-06 Agreement. The government had a vision that the migration would not only deliver improved and diversified audiovisual content to Kenyan consumers, but would also utilize spectrum more efficiently and effectively, thus freeing up a "digital dividend" for mobile services.

A phased switchover was implemented, starting with Nairobi and followed by the most urbanized areas, where uptake of digital services was expected to be high. This approach ensured that lessons learnt in a previous switchover area could be applied in subsequent areas.

The exact date for the switchover of each analogue transmitter was published and publicized six months in advance, based on the roll-out plans of the public signal distributor, as approved by the regulator. Dates for analogue switch-off and digital switch-on in the same areas or neighbouring target areas were carefully synchronized to avoid interference and service interruption.

FIVE DISTRIBUTORS
DTT (digital terrestrial television) infrastructure, based on DVB-T2 with MPEG-4 video coding, was initially rolled out by two Broadcast Signal Distributors

(BSDs): SIGNET and Pan Africa Networks Group (PANG). However, following the Supreme Court of Kenya ruling in September 2014, the Communications Authority of Kenya (CA) introduced a new licence category of self-provisioning BSDs to complement the provision of DTT infrastructure. By July 2017, three entities – Africa Digital Network Ltd (ADNL), GOtv Kenya Ltd (GOtv) and Lancia Digital Broadcast Ltd (BAMBA TV) – were issued with self-provisioning licences.

The digital switchover in Kenya not only saw the number of locally produced channels increase from a mere five to over 100, but also introduced pay-TV on terrestrial platforms at an affordable price. As a result, the country now has two pay-TV platforms offering local and

international productions, including sports, drama and blockbusters. This has resulted in increased local content production and the creation of much-needed jobs. In addition, some well-known international public broadcasters have seized the opportunity to have DTT channels in Kenya.

In 2017, the CA reviewed the BSD pricing and access framework and issued a new determination that divided the country into three areas with regard to signal distribution charges: Nairobi, other cities and urban areas, and rural areas. This new framework saw the issuance of a standard Reference Access Offer (RAO) and a further reduction in signal distribution tariffs from the prices it had prescribed in 2013.

FURTHER GROWTH
Following the successful completion of analogue switch-off in June 2015, the CA continued to assign digital television frequencies to the five signal distributors. The table below shows the total number of programmes carried in the multiplexes assigned to the signal distributors as of 30 June 2019.

The public BSD, SIGNET, operated by the national broadcaster Kenya Broadcasting Corporation (KBC), is in the process of acquiring a new headend and local insertion systems (to be installed at six sites across the country) in order to expand its DTT capacity.

By 30 June 2019, the total population coverage of the DTT network was estimated at 86%. The population coverage is derived by the CA by considering the combined coverage of both the common carriers and the self-provisioning BSDs mapped against the official population census data.

	SIGNAL DISTRIBUTOR	STATUS	NO. OF LOCAL PROGRAMMES
1	Africa Digital Network Ltd (ADN)	Self-Provisioning FTA	4
2	GOtv Kenya Ltd (GOtv)	Self-Provisioning Pay-TV	58
3	Lancia Digital Broadcasting Ltd (Bamba)	Freeview	19
4	Pan Africa Network Group (PANG)	Common Carrier FTA and Pay-TV	38
5	Signet Signal Distributors (SIGNET)	Common Carrier FTA	43

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