



The Republic of Malawi

THE MALAWI DIGITAL BROADCASTING POLICY



2013 - 2018

DVB-T2

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FOREWORD

The Malawi Digital Broadcasting Policy has been developed by the Malawi Government to provide a framework for the transition of broadcasting from analogue to digital terrestrial in Malawi. According to the International Telecommunications Union (ITU), the United Nations specialised agency for information and communication technologies-ICTs, all member countries are supposed to migrate from analogue to digital television broadcasting by 17th June 2015.

The overall objective of this Policy is to create a conducive environment for the development of the digital broadcasting industry in Malawi. Currently television broadcasting is through analogue where each broadcaster is responsible for the production of content and distribution of own signal. Digital broadcasting entails segmentation of broadcasting services into content production and signal distribution. This means television broadcasters will be responsible for content production; and at the same time there is need for a separate entity to be responsible for distribution of the television signals to the consumers/television viewers on behalf of the broadcasters.

This policy has been developed to guide the transition process from analogue to digital terrestrial television broadcasting in Malawi. It has been developed in line with The Malawi Growth and Development Strategy (MGDS) II which recognizes information as crucial for socio – economic development of the country. I, therefore, wish to call upon all stakeholders in the implementation of the Policy to act with diligence and dedication as we all strive to provide accurate and reliable information to the public for the development of our beloved nation.



Moses Kunkuyu Kalongashawa, MP
MINISTER OF INFORMATION

PREFACE

Broadcasting, as part of Information and Communication Technologies (ICTs), is one of the most economical and influential medium for the delivery of information, such as news, education and entertainment, to the public. The broadcasting sector is currently under major transformation towards the switchover from analogue to digital television broadcasting. Countries world over are migrating from analogue to digital following a Geneva 2006 (GE06) resolution by the International Telecommunications Union (ITU), which set 17th June 2015 as a deadline for all countries to migrate from analogue to digital television broadcasting. The Southern Africa Development Community (SADC) has designated 31st December, 2013 as deadline for digital switch over for all its member states. Malawi, however, has set 31st December, 2014 as her deadline for the transition. The Malawi Digital Broadcasting Policy, therefore, has been designed in line with both the ITU resolution and SADC declaration.

Digital broadcasting enables the public to access quality and more broadcast information. This is possible because the digital broadcasting technology which Malawi has adopted as a standard, DVB - T2 with MPEG 4 compression, allows a maximum number of up to 20 channels through an assigned frequency. Currently, one frequency is used to broadcast one channel.

The Malawi Digital Broadcasting Policy has been developed through a consultative process to ensure that it addresses the wishes and aspirations of a cross section of the Malawi society. Some of the institutions and individuals that participated in the consultations include Government Ministries and Departments, Parastatals, Private and all major stakeholders.

I sincerely thank all the institutions and individuals who have been involved in the development of this Policy and humbly ask concerned stakeholders and all Malawians to support its implementation at various levels.

I trust that the Malawi Digital Broadcasting Policy will help citizens fully realise their right to quality broadcasting services for the development of our country.



Grey Mang'anda

ACTING SECRETARY FOR INFORMATION

LIST OF ACRONYMS AND ABBREVIATIONS

ASO	Analogue Switch Off
CA	Conditional Access
DAB	Digital Audio Broadcasting
DISTMS	Department of Information Systems and Technology Management Services
DSO	Digital Switch On
DTT	Digital Terrestrial Television
DVB-H	Digital Video Broadcasting Hand held
DVB-T2	Digital Video Broadcasting – Terrestrial 2nd Generation
FTA	Free to Air
FTV	Free to View
GE-06	ITU Geneva Conference in 2006
HD	High Definition
HDTV	High Definition Television
ICT	Information and Communications Technology
ITU	International Telecommunications Union
MACRA	Malawi Communications Regulatory Authority
MBC	Malawi Broadcasting Corporation
MFN	Multiple Frequency Network
MHz	Megahertz
MPEG 4	Moving Picture Experts Group version 4 compression standard
OPC	Office of the President and Cabinet
CIIP	Consolidated Integrated Infrastructure Provider
RRC-06	ITU Radio Regional Conference in 2006
SADC	Southern Africa Development Community
SDTV	Standard Definition Television
SMS	Short Message Service
SFN	Single Frequency Network
STB	Set Top Box
T-DAB	Terrestrial Digital Audio Broadcasting
TV	Television
UHF	Ultra High Frequency
VHF	Very High Frequency

GLOSSARY OF TERMS

Term	Definition
Analogue System	A system that represents changing values as continuously variable physical quantities
Broadcasting	The process of transmitting a radio or television programme for public or general use
Content	Television Programmes and data
Content Provider	An institution that produces broadcasting programs. Otherwise also known as a Broadcaster
Dual Illumination	The parallel provision/transmission of television programmes in both analogue and digital mode
Digital Dividend	Unused frequency that is realized after implementing digital migration
Digital System	Uses discrete values, mostly symbolized by 1 or 0 to represent information for input, processing, transmission, storage of data
Digital Switchover	The change over from analogue broadcasting to digital broadcasting
MPEG 4	Method of defining compression of audio and video data
Multiple Frequency Network (MFN)	Multiplexing A process where multiple analogue signals or digital data streams are combined into one signal

Single Frequency Network (SFN)	A broadcast network where several transmitters simultaneously send the same signal over the same frequency channel
Set Top Box (STB)	A decoder that transforms a digital television signal into an analogue television signal that can be watched on an analogue TV set.
Radio Frequency Spectrum	The entire range of electromagnetic communications frequencies, including those used for radio, radar and television; the radio-frequency spectrum
Signal Distribution	The process whereby the output signal of a broadcasting service is taken from the point of origin, being where such a signal is made available in its final context format, from where it is conveyed to any geographical broadcasting target area by means of telecommunications media but excluding the use of facilities which operate on frequencies outside the broadcasting services frequency bands
Terrestrial Broadcasting	Broadcasting signals transmitted 'over-the-air' to an antenna
Transition period	The period during which switch over from analogue to digital broadcasting will take place

1.0 INTRODUCTION AND POLICY BACKGROUND

The Malawi Digital Broadcasting Policy is a tool for a smooth transition from analogue to digital television broadcasting, for the socio-economic development of the country. It has been developed to guide the management of the digital migration process in Malawi. The Policy outlines the guidelines and operating framework of the broadcasting services and arrangements for Malawi to ensure a smooth migration from analogue to digital broadcasting.

1.1 Digital Broadcasting Migration Background

The migration from analogue to digital broadcasting follows a resolution of the International Telecommunications Union (ITU) Regional Radio communication conference (RRC-06) held in 2006 in Geneva, Switzerland. The RRC-06 established the Geneva Agreement of 2006 (GE06) whereby member countries are required to replace the existing analogue television broadcasting transmission equipment with digital equipment by 17th June, 2015. In the Southern Africa Development Community (SADC) region, Ministers responsible for Information and Communication Technology (ICT) set 31st December, 2013 as the deadline for SADC countries to have migrated from the current analogue to digital terrestrial television (DTT) broadcasting.

The SADC Ministers responsible for ICT at their meeting in Lusaka, in November 2010, adopted the DVB-T2 with MPEG-4 compression as the transmission standard for the region. Following this, the Malawi Government adopted the DVB-T2 with MPEG-4 compression as the national standard. DVB-T2 is capable of handling up to 20 standard definition TV channels and 20 audio channels using one frequency.

1.2 Current Broadcasting Status

Currently, Malawi has 17 licensed television broadcasters including Malawi Broadcasting Corporation (MBC), the public broadcaster. MBC relays its television signal through analogue terrestrial broadcasting network that covers about 48% of the population of Malawi. The terrestrial broadcasting network uses 8 transmitters that are located in

Mzuzu, Dowa, Lilongwe, Blantyre (Mpingwe and Ndirande), Zomba and Nsanje

Other operators currently broadcasting in analogue are Calvary Family Church (CFC) with 1 transmitter in Blantyre, All for Jesus (AFJ) with 1 transmitter in Blantyre, African Bible College (ABC) with 1 transmitter in Lilongwe and Luntha with 2 transmitters, one each in Zomba and Lilongwe.

There are 34 licensed Radio broadcasters with 2 public radio stations owned by MBC. The public radio broadcaster covers 85% of the population coverage of Malawi.

2.0 LINKAGES WITH OTHER POLICIES AND STRATEGIES

Digital broadcasting is a developmental issue aimed at enhancing people's right to access to information, thereby enabling them to make informed choices and decisions on issues that affect them; and participate meaningfully in the socio-economic development of the country. It is also an issue that deals with Information and Communication Technologies (ICTs), which are widely recognised as key drivers for socio-economic and cultural development.

The Malawi Digital Broadcasting Policy is in line with the GE06 resolution which mandates member countries to migrate from analogue to digital broadcasting by 17th June, 2015. The Policy is also linked to the Lusaka November 2010 declaration of SADC Ministers responsible for ICTs which adopted the GE06 resolution and set 31st December, 2013 as the migration deadline for the region.

The Policy is further linked to the Malawi Growth and Development Strategy (MGDS) II, the Malawi Government blue print for growth and development. The MGDS II highlights the role of the ICT under Theme 4 as vital in the enhancement of “production, transportation and provision of information to the general public for human development as well as for making informed decisions”; and recognises Media and Communication as an important tool in promoting popular participation in decision making as well as in developmental processes.

3.0 PROBLEM STATEMENT

Over the years, Malawi has been experiencing increased demand for frequency from other ICT services apart from television. However most of the frequencies have been allocated to television broadcasting which makes it difficult to cater for the increased demand of frequency.

At the same time there has been growth in the television industry just like in the other ICT sectors which are all competing for the limited frequency.

In order to satisfy this demand, there was need for more frequency and these could only be realised through the introduction of digital technology. In this regard the ITU resolved that all countries migrate to a digital broadcasting regime where one frequency carries up to 20 channels, thereby freeing more spectrum band for the other services.

4.0 RATIONALE

The overarching goal of the Malawi Digital Broadcasting Policy is to create an enabling environment for the development of the digital broadcasting industry in Malawi in order to ensure smooth transition from analogue to digital and maximise the benefits of broadcasting services. It further aims at enhancing institutional, administrative, and operational and governance arrangements of the broadcasting sector.

The Policy will ensure spectrum efficiency since one frequency will be used to transmit up to 20 Television Channels and 20 Radio Channels. This means up to 20 television channels will be carried through a single frequency thereby freeing up more frequency for use by other ICT service providers.

4.0 BROAD POLICY DIRECTIONS

4.1 Overall Policy Goal

The overall goal of the Policy is to create an conducive environment for the development of digital broadcasting industry in Malawi.

4.2 Policy Objectives

The objectives of the Policy are:

- 4.2.1 To create an enabling environment for smooth transition from analogue to digital broadcasting;

- 4.2.2 To ensure equitable and quality universal broadcasting services to the public;
- 4.2.3 To ensure efficient use of spectrum;

4.3 Policy Outcomes

The expected outcomes of the Policy are:

- 4.3.1 Proper coordinated transition from analogue to digital broadcasting;
- 4.3.2 Increased production and accessibility of high quality local content;
- 4.3.3 Increased fair trade among players in the broadcasting industry;
- 4.3.4 Increased distribution of television signal for all broadcasters; and
- 4.3.5 Increased efficiency in utilization spectrum (first and second digital dividend).

5.0 POLICY PRIORITY AREAS

The problems, as stated, have a number of facets and have been presented as Policy Priority Areas. The Policy Statements associated with these Priority Areas contribute towards providing solutions to the problem. The Policy Priority Areas include:

1. Production of Adequate and High Quality Local Content;
2. Public Awareness;
3. Establishment of Public Signal Distributor and Infrastructure sharing;
4. Protection of the Local broadcasting Industry;
5. Financing Mechanism;
6. Receive equipment;
7. Spectrum Efficiency and Digital Dividend;
8. Legal and Regulatory Framework; and
9. Rural access.

5.1 Production of Adequate and High Quality Local Content

Broadcasters in the analogue era are required to produce and transmit more local content but fail to meet that requirement. The digital broadcasting

era will place a greater demand on broadcasters to produce even more and high quality local content.

The existing broadcasters and content producers do not have the capacity to produce such content to satisfy the digital platform.

Some of the local content which might be of interest to the Malawian population is in analogue form and may not be used in the digital era. There is need to digitalise the analogue local content.

Policy Statements

1. The Policy shall guide the building and strengthening of capacity for adequate and high quality local content production.
2. The Policy shall provide direction for the process of digitalising the existing analogue local content.

5.2 Public Awareness

Digital broadcasting is a new phenomenon which will have implications on the consumers and stakeholders.

Currently, there is little or no awareness among the citizens on digital broadcasting, a situation which may result in people being not ready for digital broadcasting on switch on.

This requires awareness to prepare stakeholders and the public to understand the advantages, risks and actions required to migrate to digital television broadcasting so that they are ready to accept, embrace, support and adopt this change.

Policy Statement

The Policy shall facilitate the designing and implementation of civic education and public awareness activities to prepare the masses for the transition from analogue to digital broadcasting and beyond.

5.3 Establishment of Public Signal Distributor and Infrastructure Sharing

Each broadcaster in the analogue era is responsible for the production of content and distribution of own signal. This results in failure to balance up between providing high quality content and signal transmission, since each broadcaster has its own broadcasting infrastructure.

Under digital broadcasting, up to 20 channels can be carried in a single broadcast network. There will be need for a signal distributor (s) to distribute the signal on behalf of the broadcasters.

This will result in the re-alignment of the current broadcasting market structure into infrastructural and content service provision, which entails fair competition in sharing of multiplexing and signal distribution equipment.

Policy Statements

1. The Policy shall facilitate the creation of independent signal distributor (s) to provide signal distribution services to all licensed broadcasters.
2. The Policy shall facilitate the development of clear terms, conditions and tariff framework for infrastructure sharing and fair competition among operators in the broadcast industry.

5.4 Protection of the Local Broadcasting Industry

Digital Broadcasting has the potential for infiltration of foreign investors due to the economic benefits associated with it. This may result in the market being dominated by foreign players, thereby stifling local participation. The local broadcast industry, therefore, needs to be protected from domination by foreign broadcasters.

Policy Statements

1. The Policy shall ensure that laws are put in place to protect local players and ensure their maximum participation in the broadcast industry.
2. The Policy shall facilitate the enforcement of laws that protect local players from foreign domination in the broadcast industry.

5.5 Financing Mechanism

Broadcasting is capital intensive. The transition from analogue to digital broadcasting will require even more resources to establish transmission network, production of local content, acquisition and supply of receive equipment; and creation of public awareness.

The current funding level is not adequate and hence the need for public private partnerships.

Policy Statements

1. The Policy shall ensure that Government continues financing digital broadcasting as part of its ICT development projects.
2. The Policy shall promote and encourage public private partnerships in financing digital broadcasting; and also explore other possible financing options for the same.

5.6 Receive Equipment

An analogue television set shall require receive equipment including Set Top Boxes (STBs) to receive a digital terrestrial television signal.

The receive equipment shall come at a cost and unscrupulous traders may take advantage of unsuspecting consumers.

Subscribers of private signal distributors may require to purchase a separate receive equipment to access the public network thereby forcing them to incurring an extra cost.

There is need to protect the consumer from unscrupulous suppliers; and ensure availability and affordability of the equipment.

Policy Statements

1. The Policy shall facilitate the selection and approval of the type of receive equipment to be used in Malawi.
2. The Policy shall guide the identification and accreditation of suppliers and retailers/distributors of the approved receive equipment.
3. The Policy shall facilitate the formulation and enforcement of laws and regulations that will ensure affordability of the receive equipment, especially to low income earners
4. The Policy shall facilitate the formulation and enforcement of laws and regulations that will ensure that private signal distributor's set top boxes must receive the public network signal.

5.7 Spectrum Efficiency and Digital Dividend

Analogue broadcasting entails that each broadcaster is allocated own frequency. This means the more the broadcasters, the more frequency bands that are used up, leaving no space for other ICT services.

At the same time, the emergence of other ICT services results in an increased demand for the limited frequency.

Digital broadcasting will result in release of frequency spectrum (digital dividend), that is, the unused frequency that is realized after implementing digital migration.

There is need to ensure that there is efficient, effective and economic use of the digital dividend for the ICT industry.

Policy Statement

1. The Policy shall ensure that effective a legal and regulatory framework is put in place to maximize technical and economic efficiency of the spectrum;
2. The Policy shall ensure that a legal and regulatory framework is put in place to facilitate the allocation of frequency through auctioning.

5.8 Legal and Regulatory Framework

The current analogue broadcasting licensing framework does not incorporate digital broadcasting since the licensed broadcasters are allowed to both produce content and distribute own signal. Digital broadcasting will segment the broadcasting industry into new categories and allow the provision content and signal distribution as separate services.

Currently there is no legal and regulatory framework to provide for segmentation of services in the broadcast industry.

Policy Statement

The Policy shall facilitate the review and revision of the legal and regulatory framework to provide for digital broadcasting.

5.9 Rural Access

Access to television services for the rural population is limited because power from the national grid is either insufficient or unavailable. Additionally, alternative power sources such as solar energy are expensive.

Furthermore, most people especially the rural population cannot afford television sets.

This denies the rural masses their right to access to information.

In the digital broadcasting era, rural masses should have more access to quality broadcasting services.

Policy Statements

The Policy shall advocate for Government initiatives that will make television sets affordable to low income earners.

The Policy shall support other Government policies that promote the availability of power in the rural areas.

6.0 IMPLEMENTATION ARRANGEMENTS

The success of the migration process will require coordination and involvement of all relevant organisations and individuals, both public and private. This section, therefore, briefly defines the institutional roles and responsibilities which will facilitate efficient, effective and successful transition from analogue to digital terrestrial broadcasting.

6.1 Institutional Arrangements

6.1.1 The Office of the President and Cabinet

The Office of the President and Cabinet will facilitate the adoption of appropriate policy, legal and regulatory framework; and incentives to ensure smooth transition within the set deadlines.

6.1.2 The Ministry responsible for Finance

Government will strive to make available financial resources for the transition from analogue to digital broadcasting.

6.1.3 Ministry responsible for Information

The Ministry responsible for Information will be responsible for the provision of policy direction for the management and administration of the digital broadcasting sector.

The Ministry will coordinate the implementation of the Policy as well as monitor and review policy implementation.

The Ministry shall also coordinate civic education and public awareness activities to ensure a smooth transition from analogue to digital broadcasting.

6.1.4 Government Ministries, Departments and Institutions

Other Government Ministries, Departments and Institutions shall be responsible for their roles as per their mandates and functions.

Besides, they will be responsible for production and provision of sector specific content in collaboration with the public content service provider.

6.1.5 The Malawi Broadcasting Corporation (MBC)

The Malawi Broadcasting Corporation according to the Communications Act (1998) is the designated public content service provider. MBC is mandated to provide public broadcasting services in Malawi and in this policy; MBC shall be the implementing agency of that role.

MBC shall also host channels for the broadcasting of public services information including the civic education channels which shall provide education and civic education material for health; education, information and agricultural sectors and shall collaborate with the sectoral ministries for the packaging of the material for broadcasting.

6.1.6 The Malawi Communications Regulatory Authority (MACRA)

MACRA shall regulate broadcasting services in accordance with the digital broadcasting legal and regulatory framework. This shall include:

- a. Development of appropriate new licensing framework for digital broadcasting;
- b. Revision of licenses of existing broadcasters and to impose obligations on them towards the migration from analogue to digital broadcasting;

- c. Enforcement of license conditions and obligations for operators in the broadcasting industry;
- d. Assignment of spectrum frequencies to the licensed signal distributors;
- e. Type approval digital receive equipment in collaboration with the Malawi Bureau of Standards

6.1.7 Signal Distributor(s)

There shall be signal distributors who shall be licensed to operate and maintain the distribution network and responsible for distribution and delivery of broadcast content to the consumers.

These shall operate on a transparent and non-discriminatory basis to serve licensed terrestrial broadcasters before and during the transition in accordance with set regulatory framework.

6.1.8 Multiplex Operator

The Multiplex Operator shall be responsible for packaging content from various Content Providers into appropriate bouquet(s). Considering the size of the economy and the current size of broadcasting market in Malawi, the role of the multiplex operator shall initially be carried out by the signal distributors.

6.1.9 Content Providers

The Content Provider(s) shall be licensed broadcasters to provide content to the signal distributor for transmission.

6.1.10 The Public

The Public shall be responsible for the acquisition of digital broadcasting receive equipment i.e. Set Top Boxes, antennae or digital ready television sets to fully benefit from the new digital broadcasting environment.

6.1.11 Development Partners and International Agencies

Development partners will be expected to assist in providing technical and financial support; and capacity building for the development of the digital terrestrial broadcasting sector.

6.1.12 Civil Society Organisations

Civil Society Organisations shall support the digital migration policy through civic education.

7.0 IMPLEMENTATION PLAN

All priority areas will be implemented concurrently according to the action plans. A detailed implementation arrangement is presented in the separate Implementation Strategy document.

7.0 MONITORING AND EVALUATION

The implementation of the Policy shall be monitored and evaluated for effectiveness and responsiveness in meeting intended goal and objectives. Monitoring will be done on a regular basis as may be determined.

Relevant institutions will be required to regularly report to the people, either directly or through Parliament, on the progress regarding the migration process.

Reviews will be carried out every five years. Therefore, the implementation plan will be adjusted according to lessons learnt during the period years under review.

