

Digital Terrestrial Television in the Czech Republic

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Current situation in the Czech Republic TV environment

- Population: 10 million people, 4 million households
- 4 TV terrestrial nationwide analogue channels (2 public channels, 2 private channels)
- High terrestrial penetration – 80 % of households receive the terrestrial TV signal, 20 % - cable, 17 % - satellite

Current situation in the Czech Republic television environment

- Public television service – established and defined by law for Czech TV, no licensing process
- Private television service - established and defined by broadcasting act, licensing process, broadcasters with nationwide coverage, regional coverage and local coverage
- Two private broadcasters with nationwide coverage hold licences till **2018**
- One main terrestrial broadcast network provider – natural monopoly

Current situation in the Czech Republic television environment

Regulatory bodies and their responsibilities:

1. **Council for Broadcasting:** The content regulator and the territorial coverage regulator
 2. **Czech Telecommunication Office:** The telco regulator
- In accordance with the current media law both regulators should co-operate each other. The lack of co-operation is one of the main problems in the DTT process in the Czech Republic
 - Broadcasters are responsible for the content creation and the delivery of the content to viewers
 - The current situation suits private broadcasters because they receive a high income and don't have a lot of competitors

Digital Terrestrial introduction process in the Czech Republic

- It is very long process which started in 1996
- Since May 2000 we have been testing DTT in Prague
- Due to many conflicts among regulatory bodies, Parliament and Senate the legal framework for DTT is not in place. Just the law for Czech TV was recently changed and set up the conditions for broadcasting of the DTT public multiplex.
- The Czech Republic has a shortage of free frequencies for the transition period: just one DTT network (multiplex) with 70% coverage and two multiplexes with 35% coverage were successfully coordinated with neighbours. This means there will not be a sufficient number of extra programmes in transition period. (Question – what is sufficient?)

Digital terrestrial introduction process in the Czech Republic

- A lot of strategic issues for DTT remain to be solved:
 1. Licensing of whole multiplex or space in multiplex or TV service within multiplex?
 2. Will QoS (number of TV channels per DTT multiplex, how many Mbit/s will be allocated per TV channel within a multiplex etc.) be under broadcasters or network operators or multiplex providers (new established players) or regulatory bodies' control?
 3. How deep shall the regulation of services in a multiplex be? Is it enough to say that e.g. 65 % or more of whole multiplex has to be reserved for TV services or do we need more or less regulation?

Digital terrestrial introduction process in the Czech Republic

3. Will broadcasters be allowed to broadcast additional services (whatever they want) within multiplex or just additional services associated with TV programmes? Will network operators be allowed to offer additional services themselves or only via broadcasters?
4. Will current responsibilities in broadcasting chain be changed in DTT environment? At present broadcasters are responsible for **programme production and delivery**.
5. How will must-carry rules be solved in the DTT environment?

Digital terrestrial process in the Czech Republic

7. What will the analogue switch off or switch over plan in the Czech Republic look like?

..... and more and more further questions

The amendment of media law and governmental strategy document are being drafted

BUT it is very difficult to find a consensus. Now the process should be speeded up because the EU has come knocking on the door with the recommendation to switch off all analogue transmitters by 2012.

Digital terrestrial introduction process in the Czech Republic

The Council for broadcasting published a digital licence procedure for two DTT multiplexes (~8 digital TV services) with 35% coverage) last year. Around 50 proposals were submitted and all applicants will be interviewed by the Council. If the Parliament doesn't terminate the licence procedure by a law which is being prepared we expect regular broadcasting in 2006.

Czech TV (the public broadcaster) has a clear strategy in DTT and recently also the private nationwide broadcasters publicly announced their strategies.

The introduction of the Czech Television strategy is on next slides.....

Czech TV in the current multimedia environment

Two public TV channels CT1 a CT2:

Teletext + closed captions	Teletext + closed captions
VPS	VPS
Mono	Mono
Duo	Duo
Stereo	Stereo
	
Subtitling	Subtitling

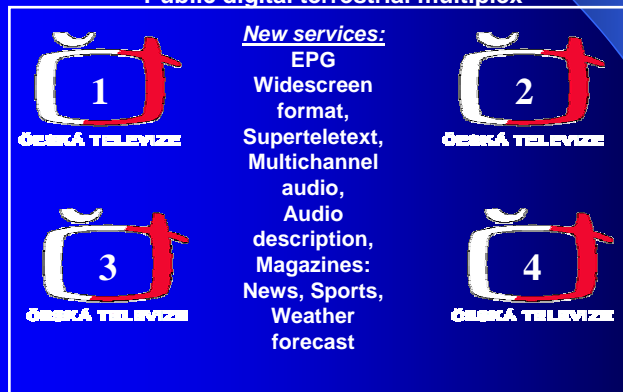
Delivery platforms:

- analogue terrestrial broadcasting
- since 1997 digital satellite broadcasting (DVB-S)
- since 2000 webTV of selected content (mostly news)
- since 2002 GSMTV of selected content (only news) – Pay Per View

The Czech TV strategy plan for the DTT environment

Two TV channels CT1 a CT2 + new thematic CT3 and CT4 channels – all together in one public digital multiplex + multimedia enhancements

Public digital terrestrial multiplex



The Czech TV strategy plan for the DTT environment

- Free to air channels in digital environment (DVB-T)
- CT3 – news and sports channel
- CT4 – educational and cultural channel
- CT1 and CT2: simulcast in analogue and digital
- The main stream will be **digital** (CT1, CT2, CT3 and CT4 to DVB-T), with CT1 and CT2 adapted to the analogue path
- The creation of added value to the current channels CT1 and CT2 (16:9, Audio Description, multichannel audio), not only simulcasting in a simple way

Key points of the Czech TV strategy

1. Create new thematic channels – highest priority (“generalist oriented channel” CT1 will be **complemented** with multithematic (with niches) or thematic channels)
2. Strengthen regional public broadcasting in the Czech Republic
3. Provide new services for handicapped people
4. Provide multimedia interactive services (first “non-personalized” and then personalized services = the first step from mass audience to individualized audience)
5. The composition of the public multiplex must be under Czech TV control!

Key points of the Czech TV strategy

6. Multimedia services built on **only open standards** (DVB-MHP)
7. Requirements related to revision of Stockholm plan 1961: indoor portable reception in urban areas and rooftop antenna reception for the rest of territory, the distribution network must correspond the territorial allocation for regional public broadcasting
8. The time schedule of implementation of the Czech television strategy plan: the launch of new CT3 channel (it is called now as CT24 news channel) was in May 2005 (unfortunately due to problems with funding of public services the channel CT24 is only available on the satellite and cable headends), the launch of channel CT4 is planned in 2006.
9. Some multimedia services (EPG, magazines) have been already tested in test transmission around Prague

Conclusions

Expectations:

- Legislation in place at the end of this year
- Regular DTT broadcasting in 2006
- Switch off date in 2010 – 2012

For the transition period :

- Only free to air offer
- No HDTV service
- Compression system: MPEG-2

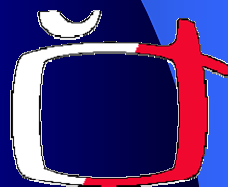
- DVB-H test transmission is planned in the Czech Republic at the end of this year

Thank you for your attention

-for more information contact

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