

Digital Switch-over in Europe

Currently the fastest growing digital television platform in Europe, digital terrestrial television services (DTT) shows promising signs for the future. In Europe, many countries have already launched their DTT services using the Digital Video Broadcasting - Terrestrial (DVB-T) standard.

Viewer adoption of DTT services has been high with over 25 million set-top boxes sold in Europe by March 2006. And as the number of households relying on the analogue terrestrial television platform decreases, national administrations can begin planning for analogue switch-off.

Already, national administrations have agreed to a new international frequency planning agreement for Bands III and IV/V in Europe, Africa and parts of Africa. As part of the Geneva 2006 (GE-06) Agreement, national administrations will end analogue transmission along their borders by 17 June 2015. This aligns well with the European Commission's recommendation that Member-States phase out analogue terrestrial broadcasting by 2012.

DTT status in Europe

Many countries in Europe have launched DTT services. Some have also begun analogue switch-off.

Belgium

Limited free-to-air DTT services are available since the launch in 2002. DTT coverage has been extended with full population coverage achieved in the Flemish Community and expected in the French Community by 2007. The Flemish Community has indicated that it is likely to begin analogue switch-off, at the latest, in 2010 and complete the task by 2012.

Czech Republic

The public service broadcaster, Czech Television, officially launched free-to-air DTT services on 21 October 2005 in Prague. Since then, coverage has been extended to 35% of the population and the broadcast regulator RRTV has allocated further DTT service licenses to commercial broadcasters. By the end of 2006, it is expected that viewers will be able to access 12 television programme services on the DTT platform.

In August 2006, the Czech Telecommunications Office (CTU) announced that analogue switch-off will take place in October 2010. However, this has provoked debate among broadcasters, as commercial broadcasters on the analogue platform have stated their preference for a later date while broadcasters on the DTT platform oppose such a delay.

Denmark

Launched on 31 March 2006, the DTT platform offer viewers access to the services from the public service broadcasters TV2 and Danmarks Radio on a single multiplex. A further three multiplexes are expected to be launched eventually, although dates and services have not yet been announced. It is likely that the full DTT platform will provide a combination of free to air and pay DTT services. Analogue switch-off is mandated by law and is set to take place on a national level in October 2009.

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Finland

First launched in August 2001, DTT services allow viewers to access 12 free-to-air and 4 pay television programme services on 3 national multiplexes. The first two multiplexes provide services to nearly 100% of the population while the third multiplex has coverage of 78% of the population. A fourth multiplex is likely to be launched by October 2006 while DVB-H services are expected to be launched on a fifth multiplex in December 2006.

Analogue switch-off is mandated by law to take place on 31 August 2007 at a national level. However, an issue may arise from the need to ensure that cable households are converted to digital in order to access digital public service programmes. Converting these households to digital may prove difficult given their current low level of digital penetration.

France

DTT services were first launched on 31 March 2005 and now offer viewers access to 18 free-to-air television programme services in addition to the services available on the pay-DTT platform. Unique to the French market, the free-to-air platform uses the MPEG-2 video compression standard whereas the MPEG-4 AVC standard is used for the pay platform. Since June 2006, 58.5% of the population can access these services and planning is underway to increase the population coverage to 70% by April 2007.

A recent government proposal sets 30 November 2011 as the date for the completion of analogue switch-off. It is expected that it will take place on a region-by-region basis commencing in March 2008. The broadcast regulator, Conseil Supérieur de l'Audiovisuel (CSA), is expected to publish the roadmap for analogue switch-off by the end of the year.

Germany

In August 2003, Berlin-Brandenburg became the first metropolis in the world to complete digital switchover. DTT services were launched alongside the existing analogue services and, following a short simulcast period, analogue services were switched off. Other regions in Germany have followed this approach and DTT services are now available in Berlin Brandenburg, North Rhine Westphalia, northern Germany, Bavaria, Mecklenburg-Vorpommern, Baden-Württemberg and Hesse. Complete analogue switch-off is expected by 2010, if not earlier.

Greece

The public service broadcaster ERT launched a trial DTT service in January 2006 which has since served as the basis for official DTT services. Services are available to 65% of the population. ERT launched the first digital service with special programmes designated for the hearing- and visually-impaired.

Italy

First launched in December 2003, the DTT platform offers 30 free-to-air television programme services on 7 national multiplexes in addition to local services. Approximately 70% of the population can access at least 6 multiplexes. In addition, 3 Italia has launched DVB-H services in June 2006 while Mediaset is expected to launch its services in October.

Until 2005, the government provided viewers with a subsidy to use towards the purchase of interactive set-top boxes which has encouraged the widespread adoption of MHP-enabled set-top boxes instead of cheaper "zapper" receivers. A successful pay-per-view (PPV) offer, launched in January 2005, has also helped boost the sales of DTT set-top boxes.

While initially planned for 31 December 2006, analogue switch-off has been postponed and the recently elected government is expected to announce a revised timetable.

Sardinia and the Aosta Valley have been selected to serve as the pilot regions for analogue switch-off.

Luxembourg

Nationwide DTT services were launched in April 2006 with the full platform available in June 2006. Analogue switch-off is expected to take place on 1 September 2006.

Malta

The broadcast network operator Multiplus launched a pay DTT platform in July 2005 offering viewers access to up to 35 television programme services. Analogue switch-off is scheduled to take place in 2010.

The Netherlands

DTT services have been available since April 2003 as a subscription service offering over 25 television service programmes. While it is now possible for 50% of the population to access DTT services, achieving full population coverage with the current service offering will not be possible without analogue switch-off.

The government had initially announced that analogue switch-off would take place on 30 October 2006. However, with elections now expected in October, analogue switch-off will likely be postponed.

Spain

Since the re-launch of DTT services on 30 November 2005, approximately 80% of the population can access 20 free-to-air national television programme services, in addition to regional and local services. This re-launch follows a failed attempt to launch a pay DTT platform in May 2000.

The government has set analogue switch-off for 3 April 2010, nearly three years earlier than the initial date set by the previous government. The autonomous region of Catalonia has announced plans to complete analogue switch-off by November 2009 and thus become the first all-digital region in Spain.

Sweden

Launched on 1 April 1999, the Swedish DTT platform provides viewers access to over 30 television programme services on 6 multiplexes. DTT services are available to 90% of the population with the multiplex allocated to the public service broadcaster SVT expected to reach 99.8% of the population by the end of 2007. The pay DTT platform, operated by Boxer TV Access, has proven successful.

Analogue switch-off commenced on 19 September 2005 in the region of Gotland and is expected to be completed by November 2007 in order to meet the 1 February 2008 deadline mandated by Parliament. The process is taking place by region and in five phases, leaving the largest cities for last. Since May 2006, the first two phases of analogue switch-off have been completed.

Switzerland

In order to have the necessary capacity to launch DTT services, partial analogue switch-off took place in March 2002 when the public broadcaster SRG SSR turned off two out of its four analogue channels throughout the country.

DTT services have since been rolled out region-by-region offering viewers the four public service broadcast programme services which were available prior to partial analogue switch-off in 2002. It is expected that country-wide coverage will be reached by 2008.

Full analogue switch-off began in the Italian-speaking region in July 2006 and will continue on region-by-region basis until completion in October 2008.

United Kingdom

Following the unsuccessful attempt to launch a pay-DTT service in 1998, the launch of Freeview in October 2002 revived the DTT platform. The platform provides 73% of the population with access to 30 free-to-air television programme services in addition to 10 services available on the pay DTT platform.

In September 2005, the Government endorsed the digital switchover timetable drawn up by the communications regulator Ofcom. Analogue switch-off will proceed regionally, beginning in 2008 with the northwest and ending with London and the southeast in 2012. The first major test for analogue switch-off will take place in 2009 when the city of Manchester switches off its analogue television.

At the behest of the government, broadcasters on the analogue terrestrial platform as well as DTT multiplex operators have launched Digital UK, a not-for-profit organisation tasked with coordinating digital switchover.

September 2006

About DigiTAG

DigiTAG aims to encourage and facilitate the implementation and introduction of digital terrestrial television services using the Digital Video Broadcasting Project's Standard (DVB-T). It has over 55 members from broadcasting, network operators, regulatory, and manufacturing organisations throughout Europe and beyond.