







AIBD/ITU/ABU Pre-Summit Workshop on Enabling & Enhancing the DTT Broadcasting Experiences: The Development of Digital Broadcasting in ASEAN



DTTB implementation in Thailand 23 May 2016, Incheon, Republic of Korea

> Ms. Orasri Srirasa NBTC, Thailand



Content



- Broadcasting Landscape
- DSO Roadmap in Thailand
- DTTB implementing status in Thailand
- ASO Status
- Community TV
- Mobile TV
- DTT Receivers & DTV Coupon Program-Subsidy Campaign
- Digital Communication, Information and Customer Support
- Lesson Leaned

National Broadcasting and Telecommunications Commission (NBTC)



Established under the "Act on Organization to Assign Radio Frequency and to Regulate the Broadcasting and Telecommunication Service, B.E. 2553 (2010)"

NBTC mandates:

- ☐ To license and regulate the operation of TV and radio broadcasting, radio communication, and telecommunications
- ☐ To promote free and fair competition in the industry
- ☐ To ensure universal telecommunications service is provided
- ☐ To promote research and development in the industry
- ☐ To protect right and liberty of the citizen and consumers from being exploited by the operators
- ☐ To maintain plurality in the provision of broadcasting
- ☐ To protect for the citizen and consumers against unfairness or the infringement of privacy, and against

The NRA
Organization Act of
2010*

Telecommunications Business Act of 2001



Mobile

Spectrum

Broadcasting
Business Act of
2008

Fixed line

Internet

Radio Communications Act of 1955

TV

Radio

Broadcasting Landscape



History of TV Broadcasting in Thailand: 60 years









B.E.2498

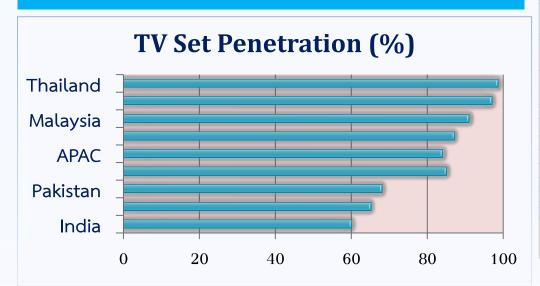
B.E.2510

Black & White --12 years -Color Analog ----

- 46 years -----

Digital

~ 22 million TVHHs in Thailand with 98% TV penetration, APAC average 84%



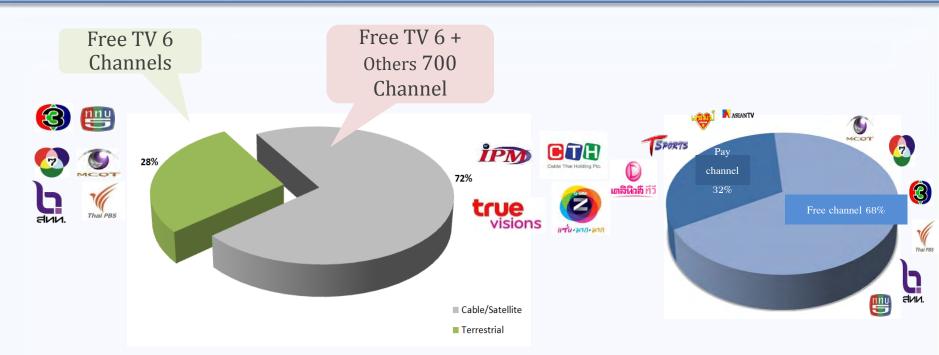
ADEX Share 2015

Thailand Media adv.	Million Baht	%Share
TV	57,525.77	47.03%
Cable TV	6,054.73	4.95%
Digital TV	20,930.25	17.11%
Radio	5,675.43	4.64%
Newspapers	12,331.76	10.08%
Magazines	4,226.52	3.46%
Cinema	5,133.58	4.20%
Outdoor	4,264.53	3.49%
Transit	4,477.89	3.66%
In-Store	639.06	0.52%
Internet	1,058.28	0.87%
Grand Total	122,317.78	100.00%

Exchange rate

Broadcasting Landscape: TV Market in Thailand



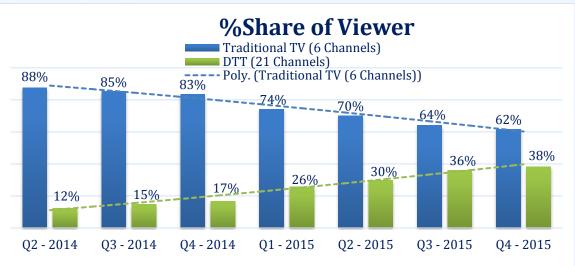


- Cable/Satellite are major platforms for TV broadcasting before DSO
 - 28% watch TV via Terrestrial
 - 72% watch TV via Cable/Satellite

- Most Thais use Cable or Satellite for watching Free TV channels
- 68 % of Thais watch FTV channels
- 32 % of Thais watch Cable/Sat Channels

DTT Platform and Viewer Share







Source: Nielsen

45,000 40,000 35,000 30,000 25,000 Million Baht 20,000 15,000 10,000 5,000 0

ADEX in Q1 2016 in Tradition TV 12,515 million THB (74%) and DTT 4,486 million THB (26%)

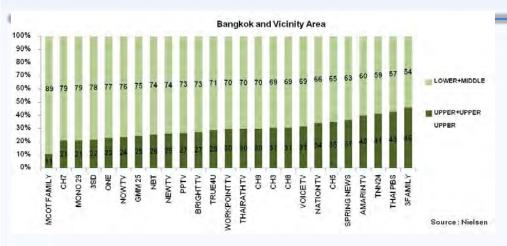
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40,00	0 -		39,162	39,759	38,689
35,00	0 -	33,200			
30,00	0 -				
25,00	0 -				
20,00	0 -				
15,00	0 -				
20,000 15,000 10,000 5,000	0 -				
5,00	0 -				
(0 -				
		Jan - Jun	Jul - Dec	Jan - Jun	Jul - Dec
		2014	2014	2015	2015
■ Traditional TV (6 Channels)		31,831	31,946	29,239	28,280
■ New DTT (21 Channels)		1,369	7,216	10,520	10,409

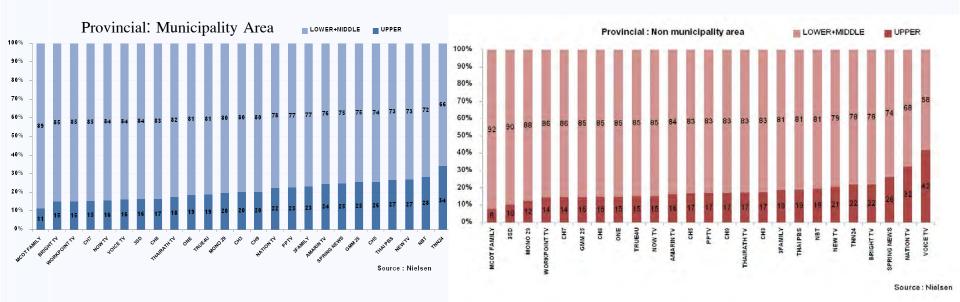
ADEX 2014-2015

Traditional TV · New DTT

DTT Audience Ratio: by Area & Income







DSO Roadmap (Broadcasting Master Plan#1: 2012-2016)



Year 1 (2012)	Year 2	Year 3	Year 4	Year 5 (2016)		
DSO-TV Plan						
Digital TV Lice	nsing		1			
Starting Digital TV broadcast		ing				
Infra-sharing methodology + Dbase						
R&D measure	es for Digital '					
Planning and Implementing DTV receiver subsidy						
Planning and Implementing Digital Communication						
80%+ of households can reach Digital TV						

DTTB implement Status in Thailand



Digital TV Roadmap: Feb 2012

DVB-T2 Standard Adopted: Jun 2012

Digital TV Trial: Q1 2013

Facility/ Network Licensing: Jun 2013

DSO Comunication: 2014>>

Subsidy coupon round 1: Oct 2014

Start Analog Switch-Off
Dec2015>> 3 cities switch off

Roadmap Development for MTV 2015>>

2015

DTV Network: 90% HH coverage Subsidy Campaign#2 (Coupon)

2012





2013



2014



Technical Standard for DTTB Transmissiom/ Reciever-ver1, Frequency Plan:2012

Technical Standard for DTTB Reciever-ver2, Certified STB DVB-T2:Q3 2013

Licensing of Business Broadcasting Services

•Spectrum Auction : Dec 2013

•On-Air : Apr2014

Licensing of Public Broadcast Services: Ch 10 in 2015 2015>>

Community TV >>

Develop CTV Policy Regulatory Framework, Guideline, Start process of trial CTV prototype: Q3-2016

DTTB Frequency Planning



- Frequency Range : UHF 510 790 MHz
- Bandwidth: 8 MHz
- Frequency Channel: Channel 26 60
- Service Area: 39 service areas
- Number of Main sites : 39 sites
- 5 MUXs (5 frequency channels) per Service Area
- 6th MUX is reserved for community services
- Infrastructure sharing between all MUXs

Frequency Planning Basic Approach:

- Each main site will be MFN with others.
- Each main site and its additional sites will be SFN.
- Compatibility between D-D and D-A
- FX reception coverage target is 95% of households

Policy on DTTB technology

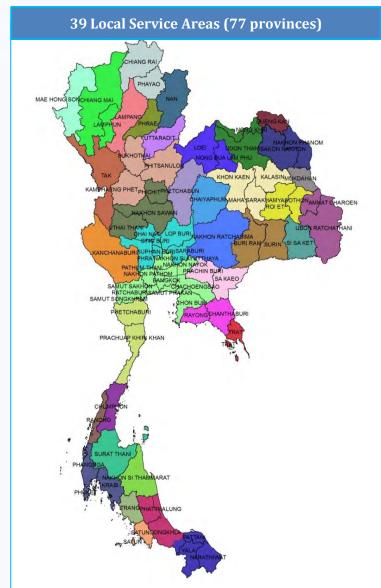
- DVB-T2 was selected for DTTB transmission standard
- Resolution is HD and SD are applied.







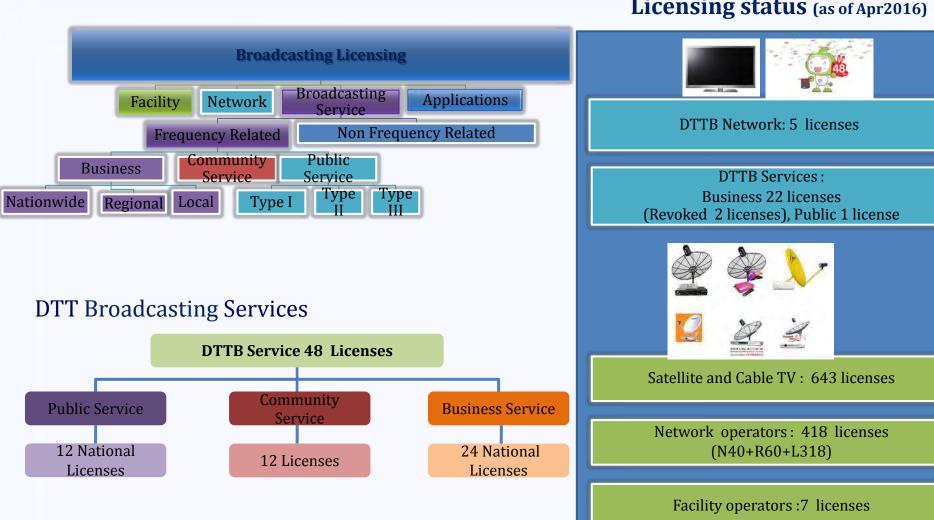




Broadcasting Licensing Scheme



Licensing status (as of Apr2016)



DTTB Services: Must Carry

DTTB Services Licensing: Spectrum Auction



Spectrum auction for business broadcasting service-National Level- 4 Categories

on 26-27 Dec2013







Kids & Family

• 3 Licenses

Reserve Price 140 MB

• Total Bidding Price 1,974 MB

News and **Documentary**

- 7 Licenses
- Reserve Price 220 MB

• Total Bidding Price 9,238 MB

SD-General

- 7 Licenses
- Reserve Price 380 MB

 Total Bidding Price 15,950 MB

HD-Genenal

- 7 Licenses
- Reserve Price 1510 MB

Total Bidding Price 23,700 MB

Total 24 Business Service licenses (Reserve Price \$ 474 million)

Auction Results 50,862 MB (\$ 1,589 million)

DTTB Channeling: 48 Channels



Kids/Youth & Family Channels 13-15



Public Channels 1-12

Community TV: 37 to 48 reserved in each service area * Now Ch1-3 are simulcast channels BRIGHT TV VOICE

8 new tv

News /Info Channels 16-22

General Channels (SD) 23-29

true 4U

G"MM

NOW

ความคมชัดปกติ (SD, Standard Definition) **General Channels** (HD) 30-36



32 ไทยรัฐ ไข









ความคมชิดสง (HD, High Definition)



DTTB Network Licensing and Roll-out Status



Network Licensing

- Issued 5 DTTB Network Licenses for 4
 Network Providers (PRD 1, RTA 2, MCOT1, TPBS1) in Jun 2013, all agreed to share common facilities e.g. towers, antennas, combiners
- 39 main sites and 24 additional sites implemented cover 86% HHs coverage as of Apr2016



Public Relation Department (PRD)

1 network license



Royal Thai Army
2 network licenses



MCOT 1 network license



Regulate on Network Licenses

Network Rollout Obligation: 95% HHs

coverage within 4 years: 39 main sites +

132 Additional Sites

Year	HH Coverage		
1	50% in Jun 2014 (11 mil. HH)		
2	80% in Jun 2015 (17.6 mil. HHs)		
3	90% in Jun 2016 (19.8 mil. HHs)		
4	95% in Jun 2017 (22 mil. HH)		

- Portable indoor reception mode in Municipality areas
- 20 % of MUX Capacity for Community TV service



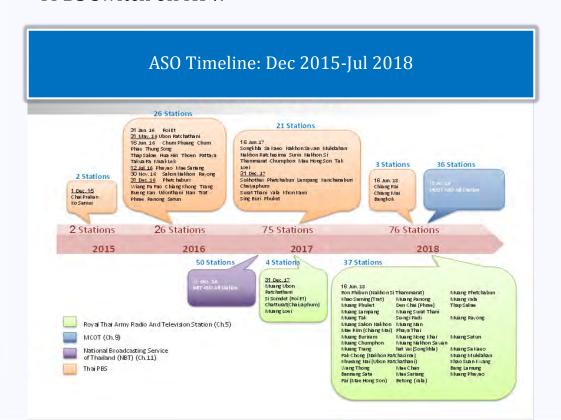
ASO Status



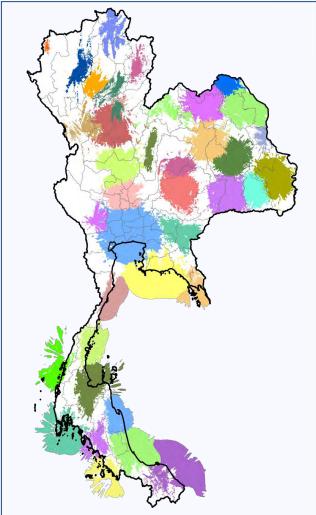
ASO Plan: 4 ATV channels (Ch5, Ch11, Ch9, TPBS) will switch Off ATV by mid of 2018, ASO planning for 2 channels (Ch3 and Ch7,their concession agreement in 2020,2023).

ASO Starting: 3 ATV sites switch off since Dec2015, and 26 sites (TPBS) will be switch off in 2016.

The MUX6th is reserved for Community TV, available after TPBS switch off ATV.



DTV Coverage: Expand from 80% to 90 of HH% (Jun2015 to Jun2016)



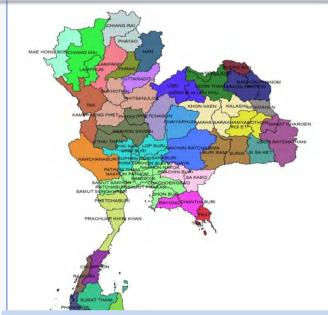
Community TV



NBTC Organization Act:

- ▶ 20% of spectrum reserved for non-commercial public/citizen usage.
- Spectrum reserved for non-commercial public/citizen usage will be implemented after the Digital Switch Over
- NBTC, ITU/UNESCO collaboration on project:
 Development of a Framework for Introducing Community
 TV Broadcasting Services in Thailand
 - Country Case Studies covering Policy and regulation, Technology, Content, Measures for promoting, services, Issues/challenges/opportunities and lessons learned
 - Develop Framework for introducing Community TV Broadcasting Services in Thailand, Policy and regulation, Technology, Licensing framework, Measures for promoting the service
 - Guidelines/recommendations for setting up a trial of Community TV Broadcasting Services in Thailand
 - Capacity Building: Workshop/Conference, focus group

39 DTV Service Areas (12 Ch/Area for Community TV)





Mobile TV Services







Mobile Television Services:

Implementation Strategies for Thailand

Vlay 2015

DTT Receiver: Specification

Mandating DTT Receivers



- DVB-T2 Receiver (including Set-top-box and integrated Digital TV) has to comply with NBTC's DVB-T2 Receiver Specification Edition 2012 and 2013 (Amendment).
- Draft of ASEAN Common Specification and specifications from ASEAN countries has been used as a baseline during developing the above specification.

ASEAN Digital Broadcasting (ADB) initiative to develop common specifications for DVB-T2

receivers



 Self Conformance scheme: Submit test reports to conform and to eligible for conformance Mandating the Digital Receivers sticker and Digital TV Mascot & Logo





Registration Process and get Approval from NBTC

Submit Reports

DTT Receiver: Type Approval Sticker



Digital TT Receiver Type Approval

Year	STB (DVB-T2)	iDTV	Portable	Total (Models)
2014	147	238	45	430
2015	10	159	20	189
Jan-Apr2016	1	152	11	164



	STB			Total
Year	(DVB-T2)	iDTV	Portable	(units)
2014	13,221,429	1,632,592	2,577,189	17,431,210
2015	2,316,960	2,758,263	165,045	5,240,268
Jan-Apr2016	17,284	1,381,905	23,800	1,422,989

Revenue from DTT Receiver sticker label

Month	STB (DVB-T2)	iDTV	Portable	Total (THB)
2014	66,107,145	8,162,960	12,885,945	87,156,050
2015	11,584,800	13,791,315	825,225	26,201,340
Jan-Apr2016	6,058,340	692,007	127,330	7,016,920







Portable: Tablet, WIFI
Hotspot and Smart Phone
with built-in DVB-T2 tuner



*EXCHANGE RATE 35 THB PER US \$

DTV Coupon Program-Subsidy Campaign



DVB-T2 Receiver Coupon Program

- NBTC set a coupon program as a subsidy measure and distribute cash coupon to every households in Thailand, the subsidy budget for 22.9 million households comes from revenue of Spectrum auction for DTTB Services to support Digital TV Switch-over.
- National Council for Peace and Order (NCPO) Committee approved to utilize some parts of the revenue from auction for DTT Receiver Subsidy Program
- The reserve price portion (15,190 million Bath) from the broadcasting frequency auction was allocated for the program.
- Digital TV coupons worth THB 690 (\$20) for digital TV receivers delivered since October 10, 2014.
- The coupon can be used for Digital Set-Top-Box and iDTV Set with built-in tuners



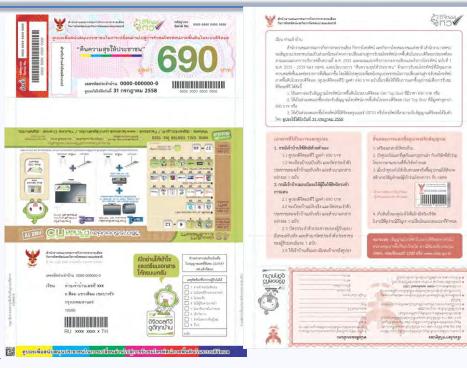


DTV Coupon Program-Subsidy Campaign



How coupon program works

- Coupons are distributed to eligible HH via postal services.
- The eligible HH:
 - Household registration (House ID)
 - Registered householder
- The received coupon can be exchanged for a basic Set-Top-Box or as a discount card for a premium Set-Top-Box or iDTV
- Authorized suppliers/vendor have to request a program sticker for each Set-Top-Box or iDTV, required to stick it on the used coupon.





DTV Coupon Program-Subsidy Campaign



Coupon Status (as of 31 Jan 2016)

13.57 million coupons were distributed to eligible HHs in 77 provinces with redemption rate 64% or 8.7 million coupons were activated.

		Distribution Area				
Lot	Distribution Date	Coupon	Province	District	Redemption Rate	Expired Date
1	10 Oct 2014	4,645,495	21	Alls	63%	31 Jul 2015
2	28 Nov 2014	1,777,495	20	100	67%	31 Jul 2015
3	24 Dec 2014	623,401	4	41	73%	31 Aug 2015
4	28 Jan 2015	633,825	5	38	68%	30 Sep 2015
5	10 Feb 2015	517,463	7	36	72%	31 Oct 2015
6	6 Mar 2015	124,763	4	8	67%	30 Nov 2015
7	21 May 2015	5,248,854	56	476	62%	31 Jan 2016
	All	13,571,296			64%	

The 2nd subsidy Project

Feb2016, NCPO/Prime Minister approved a proposal from the Office of NBTC to subsidize DTV receiver by coupons for 4 groups of households as the follows:

- ➤ Eligible householders of the first lot which did not receive coupons and those coupons were returned to the Office of NBTC by Thailand Post Company.
- Any Household having house registration document and householder after 16 Sep2014
- Any household with a house but doesn't has a householder
- ➤ Any household with temporary house registration document

DSO Communication



DTTB Communication strategy

DTTB
Understan
ding

DTTB
Attitudes

DTTB
To adopt
DTTB
Adoption

DTTB
Adoption

DTTB
Adoption

DTTB
Adoption

DTTB

- DSO communication to promote Digital TV
- Create awareness and educate to people on DSO
- Communicate on various channels; TV, Radio, SMS, Newspaper, On-Line and Social Media (https://www.facebook.com/digitaltv.nbtc), DTV Web site (http://digital.nbtc.go.th), Events & Exhibitions, DTV Road show
- Create media and national message and handbook for promoting DSO
- Implementing Coverage Checker on web and Mobile/Tablet Applications
- Build community, local administration to promote DTV
- Cooperate with Universities, Network Operators, DTV manufactures to support customer on DTV installation
- Cooperate with DTV broadcasters, telecom operators to promote DTV
- Encourage high rise building (apartment, condominium) to install DTV antenna
- Project DTV4All, All4DTV, support disabilities people

DSO Communication



DTV Mascot "Nong Doo Dee"



















DTV Song

https://www.youtube.com/watch?v=mCVSPaIA8oc

Mass Communication on TV





DSO Communication

Promoting and Educating Digital TV



Roadshow





DTV Troop





DTV events











Information and Customer Support

Promoting and Educating Digital TV: Social Media

Website http://digital.nbtc.go.th

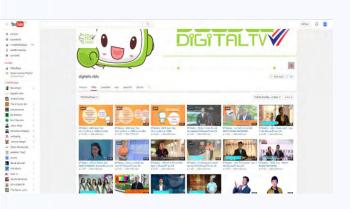


Facebook

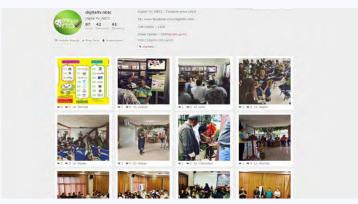
(https://www.facebook.com/digitaltv.nbtc),



Youtube



Intragram



Line Application



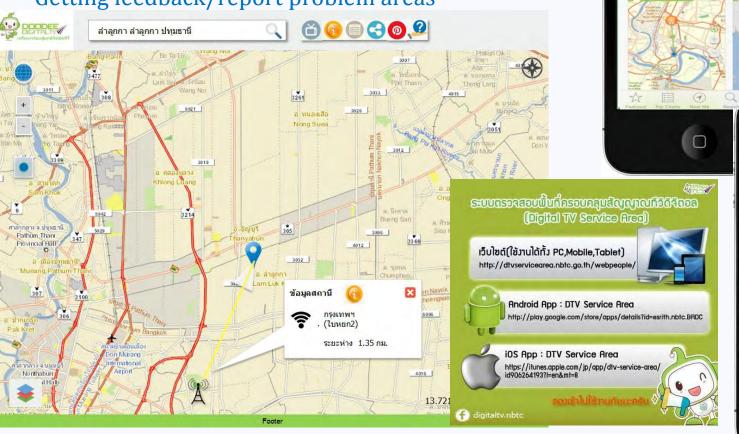
Information and Customer Support

Coverage Checker: DTV Service Area

Web Application and Mobile Application (iOS/Android)

- Location of Transmitter, Distance, Ant Direction
- Coverage, Network Deployment Status, MUX and Frequency Channel information

Getting feedback/report problem areas



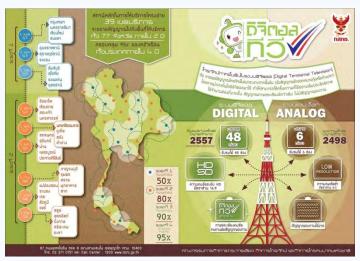


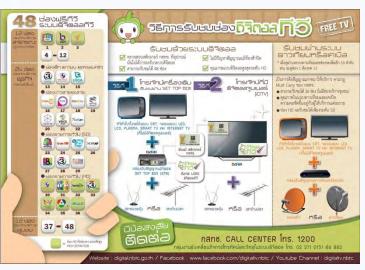
Information and Customer Support

Promoting and Educating Digital TV



Print medias





Project DTV4all, all4DTV







Handbook: DTV Installation

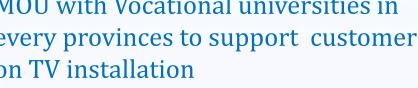


Project DTV4all, all4DTV: Social Media Communication (Viral) with supporting from Super star, Singers, famous people

Information and Customer Support Customer Cooperate with university, technical college



MOU with Vocational universities in every provinces to support customer on TV installation











DTV Technical Training to technician





Information and Customer Support CustomerCooperate with Government agencies



MOU with Royal Thai Army (Network Operator) to build DTV demo set in public local service center (eg. Local hospital)





Governor Monthly update



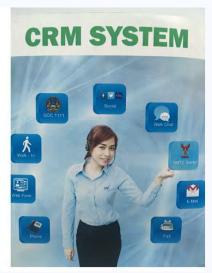


Information and Customer SupportCall Center and Customer Complaint Handling



Call Center 7 days, 24 hrs





Call Center : Mobile Application





Various Call Center Channels

- •Phone to Hot line 1200
- •Walk-in
- Social Media
- •Web Chat/ Web form
- •Email
- •Fax
- •Government Call Center (GCC 1111)
- •NBTC sectors/Branch office

- •Mobile application has been launched in Apr 2015.
- Receive customer complaint with mark location, capable to attach photo/VDO
- •1098 topic raised via application, 90% is information inquiry on DTV, 4G Auctions, and prepaid SIM register, 10% is complaints.

Customer Complain Handling: Set up Consumer Protection Subcommittee and Consumer Protection Bureau

Information and Customer Support Customer DTV Coupon inquiry via Call Center



NBTC provide information support customer via Call Center on DTV coupon accumulated 513,042 calls from 10 Oct till2014 5Feb2016.

Most calls are information inquiry, only 66 calls are complaints.



Information and Customer Support Customer Consumer protection activity, ASO awareness



Workshop on ASO with local community





ASO Awareness Project-ASO knock door





Project Smart Media for Smart Consumers





Cooperation with broadcaster on Media Literacy

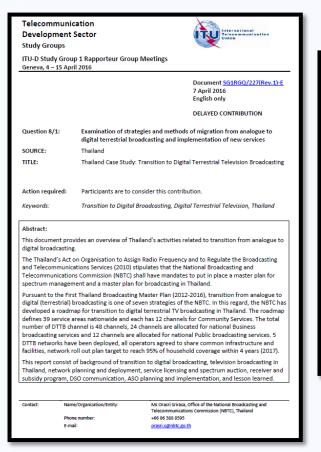
ITU-D Study Group1: Question 8/1

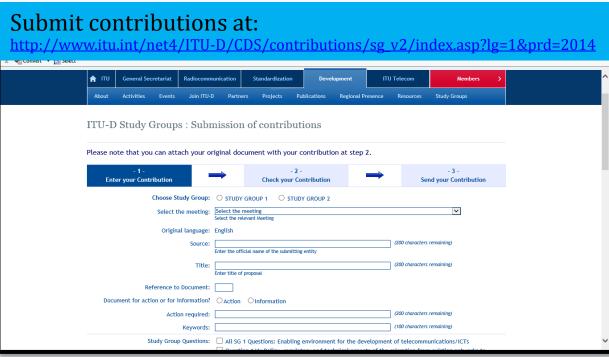


Examination of strategies and methods of migration from analogue to digital terrestrial broadcasting and implementation of new services

Thailand Case Study:

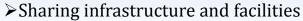
Transition to Digital Terrestrial Television Broadcasting **Document** SG1RG0/227(Rev.1)-E





Lesson Learned (1)

DTTB Network Rollout



- Ensuring that network rollout, network coverage an network quality of every MUXs are ready to provide broadcasting service the same period for fair competition.
- ➤ Regular network quality
- ➤ Setting proper Service Availability, faster recovery, redundancy system/location should be well planned in network design in the first place.
- ➤ Utilize existing antenna system and site facilities of existing network operators

Digital Communication

- ➤ Mass communication to public, simply key message
- ➤ Getting engagement from government agencies in state and local level, public and relevant. organization.
- ➤On-Line Communication such facebook, youtube, twitter, line applications

Digital TV Subsidy Program

- ➤ Collaboration between the agencies who distribute the set-top-box coupons
- ➤DTV Coupon should be distributed to areas whereas DTTB signal covered.
- ➤ If there is enough budget, DTV coupon should be distributed thoroughly to every households and cover all groups of audiences.
- ➤DTV coupon value should be enough to cover a qualified set top box with necessary accessories to receive signal
- ▶ Proper training for the STB installers prior to distribution of coupon and STB

Receivers

- Collaboration with Vocational school and network operators to help people on STB Receiver Installation, also set up advisory group to support installation.
- > Develop application or tool to help the people to equip and tilt the antenna correctly like 'DTV Service Area'
- ➤ Having variety of receiver types like portable DTV Receivers e.g. smartphone, tablet, or portable.
- > Selecting proper antennas type and model for Set-Top-Box is important to receive signal well.
- ➤ Set up advisory group either by dedicated group or volunteer group to support installation.

Lesson Learned (2)

Must Carry

➤ NBTC enforced the rule of 'must carry' for the commercial and public service broadcasters to commence broadcasting DTV content from day one on satellite and cable TV which already cover more than 70% audiences in Thailand to increase DTV eye balls.

Collaboration

- ➤ Collaboration with industry : ATV and DTV broadcasters, DTTB network operators, manufacturers, retailers
- ➤ Collaboration with government agencies and public agencies in national and local level are also key factors to drive a success of digital transition.

Set up trial

➤ Trial on the DTT system at the early transition before fully commercial launch was important to test the whole system and trial broadcasting markets.

Rating of Television Broadcasting

➤ Rating survey should be conducted to cover all broadcasting platforms including digital platform (i.e. internet) to have real broadcasting rating and user behavior.

Call Center and Information to Support Customer

➤ Cooperation with DTTB network operators to help people on installation the DTTB receivers, and also build confidence on DTTB network quality.

Supporting Fund

During transition, DSO programme project should get enough supporting fund for successful promoting and supporting. In Thailand, Broadcasting and Telecommunications Research and Development Fund for the Public Interest (BTFP) was established by funding from annual fee with certain revenue shared by each business broadcasters.



Thank You



http://www.nbtc.go.th/
http://digital.nbtc.go.th/

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