

Switchover in France: issues and effects

Sarajevo

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Research Department

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- ▶ **French DTT deployment**
 - ▶ **Standards**
 - ▶ **Coverage development**
 - ▶ **Switchover roadmap**
 - ▶ **The "Coulommiers case": first switchover attempt**
- ▶ **Digital and DTT effects on the French audiovisual landscape**
 - ▶ **Platforms penetration**
 - ▶ **Platforms share of market**
- ▶ **New digital services**

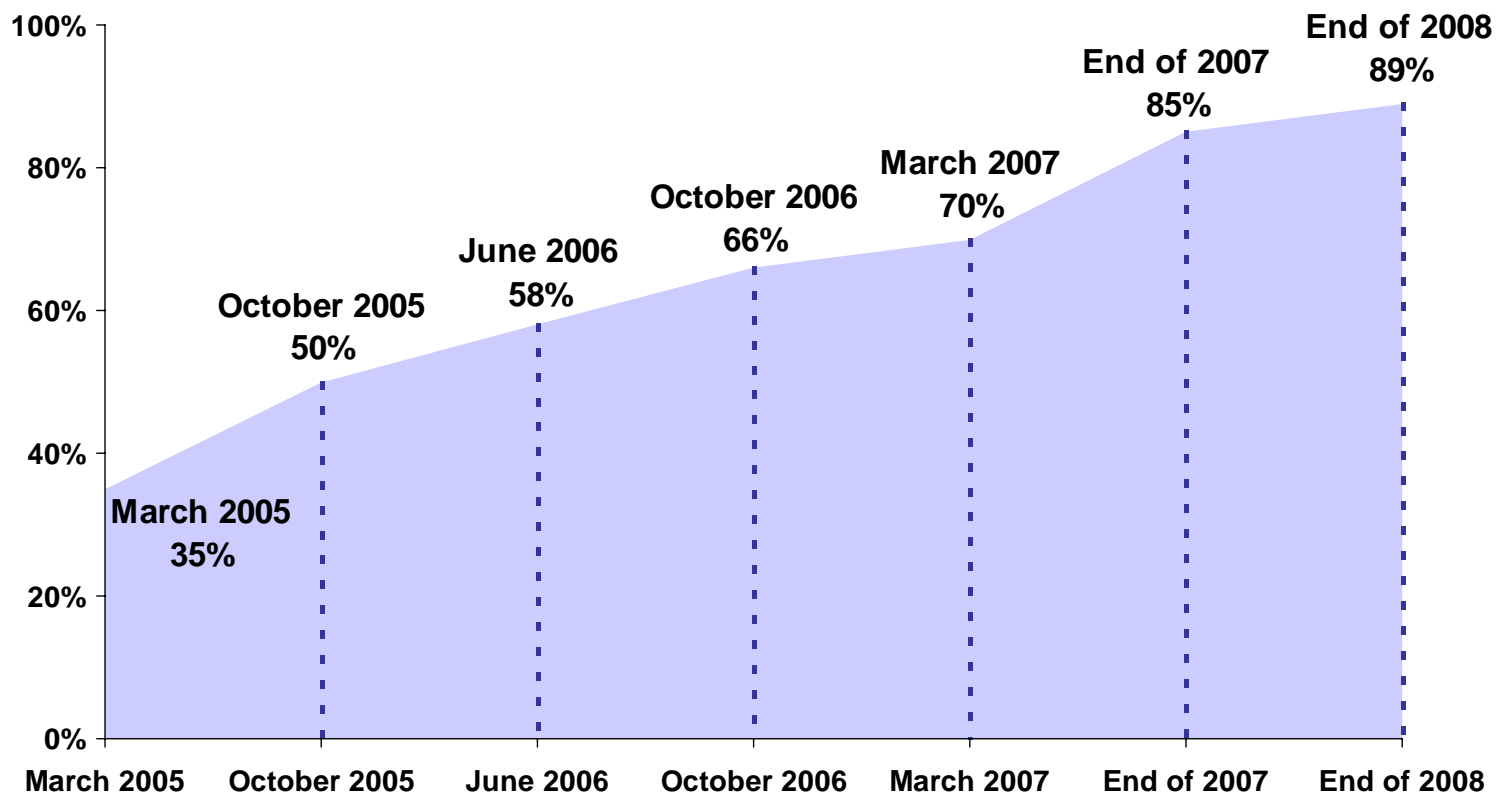
 - ▶ **HD**
 - ▶ **Mobile TV**
 - ▶ **And also: digital radio and interactivity**

- ▶ **Main standard: DVB-T**
 - ▶ **Free DTT: MPEG-2**
 - ▶ **Pay DTT: MPEG-4**
 - ▶ **HD (either free or pay): MPEG-4**

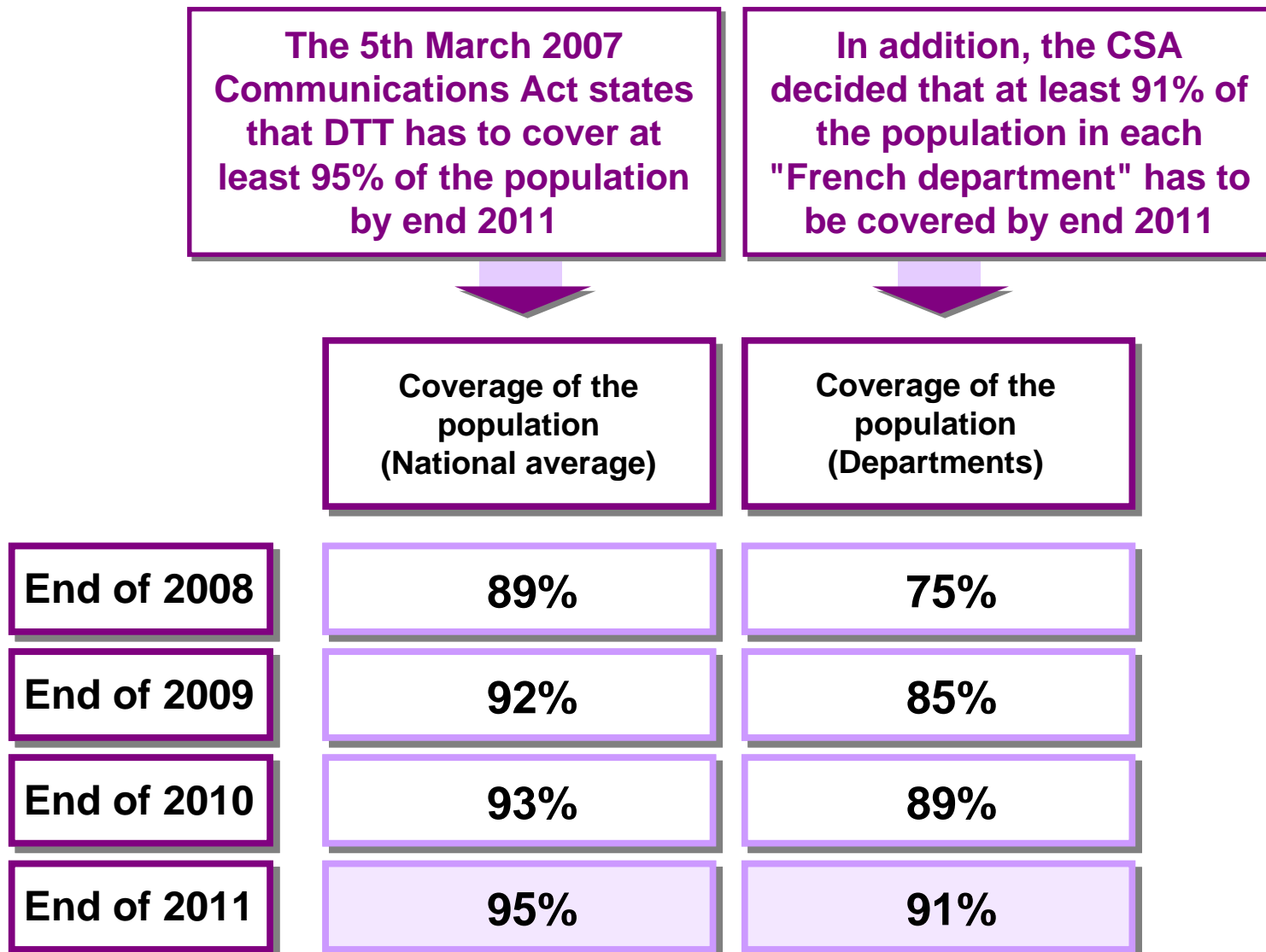
- ▶ **March 2008: TV set sold must contain a DTT decoder (at least MPEG-2)**
(march 2007 Act)



▶ DTT will cover 89% of the French territory at the end of 2008

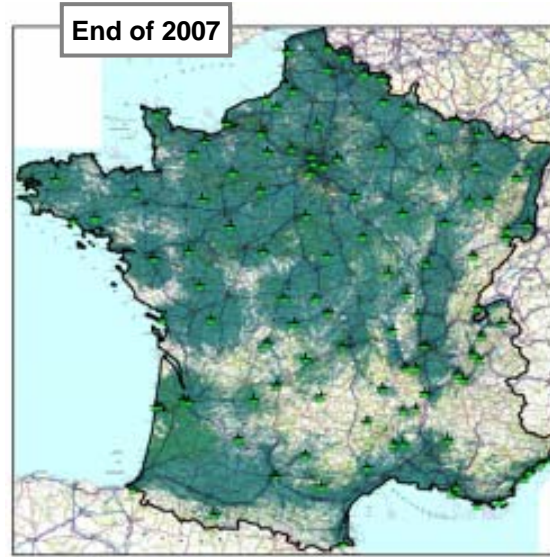
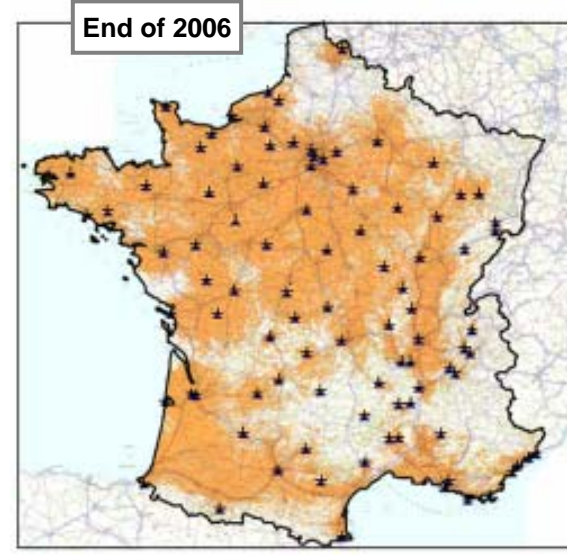
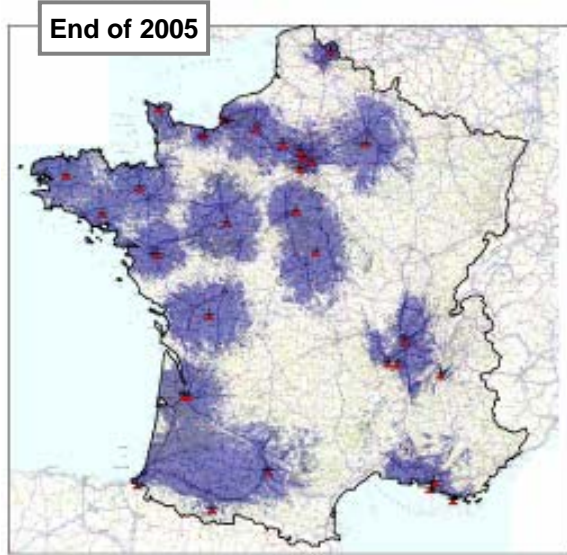


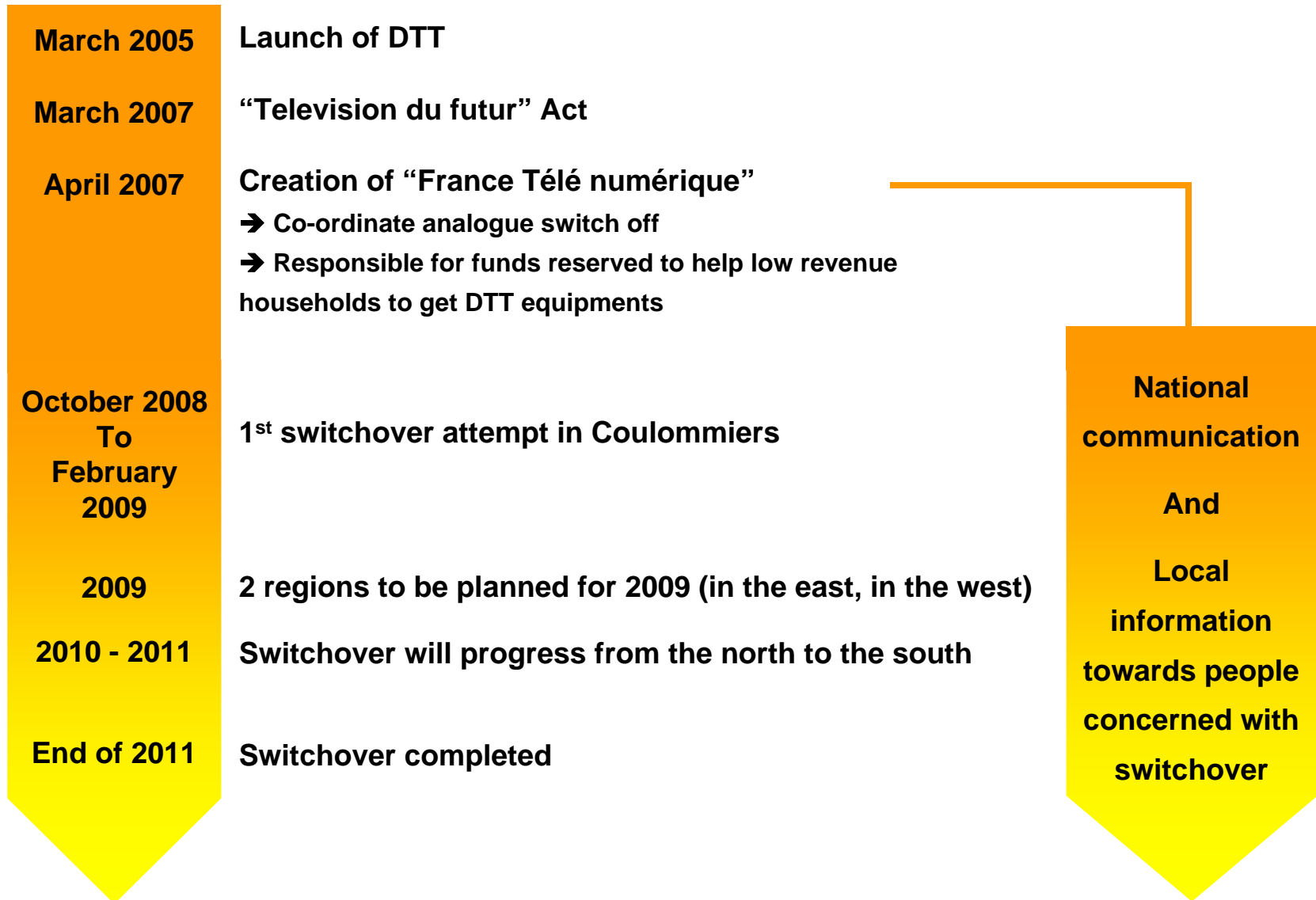
Source: CSA



Free-to-air TV

DTT COVERAGE MAPS





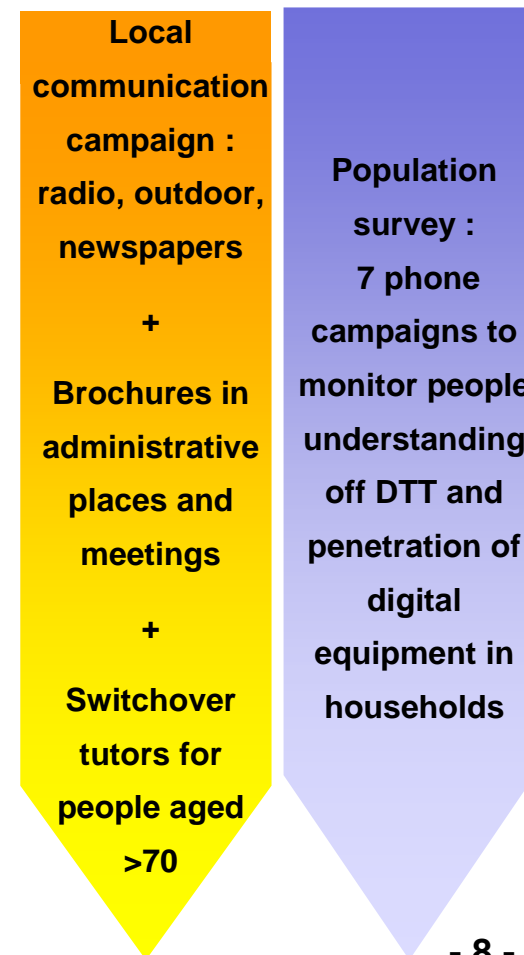
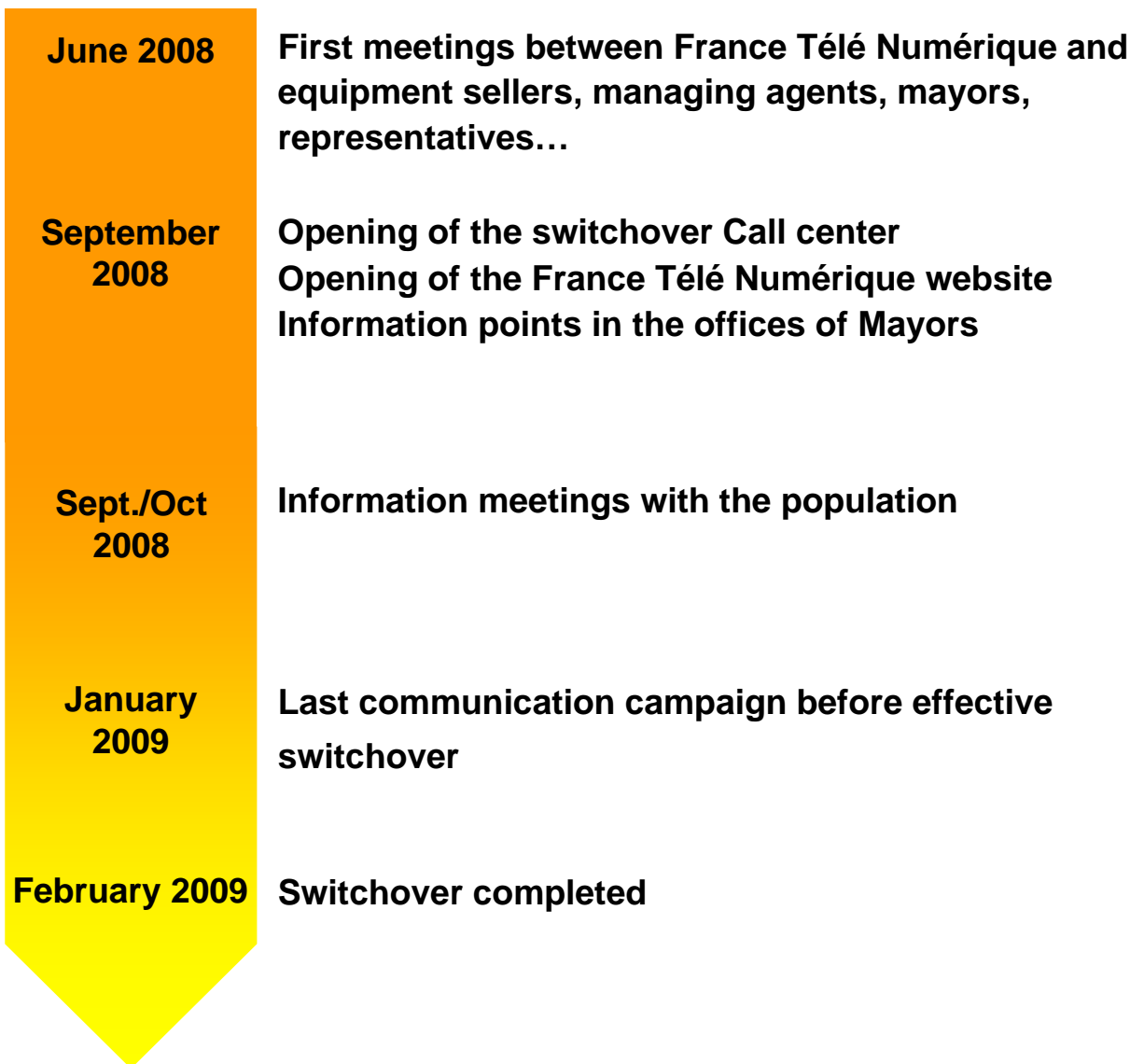
French DTT deployment

THE "COULOMMIERS CASE" : FIRST SWITCHOVER ATTEMPT



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November 2008

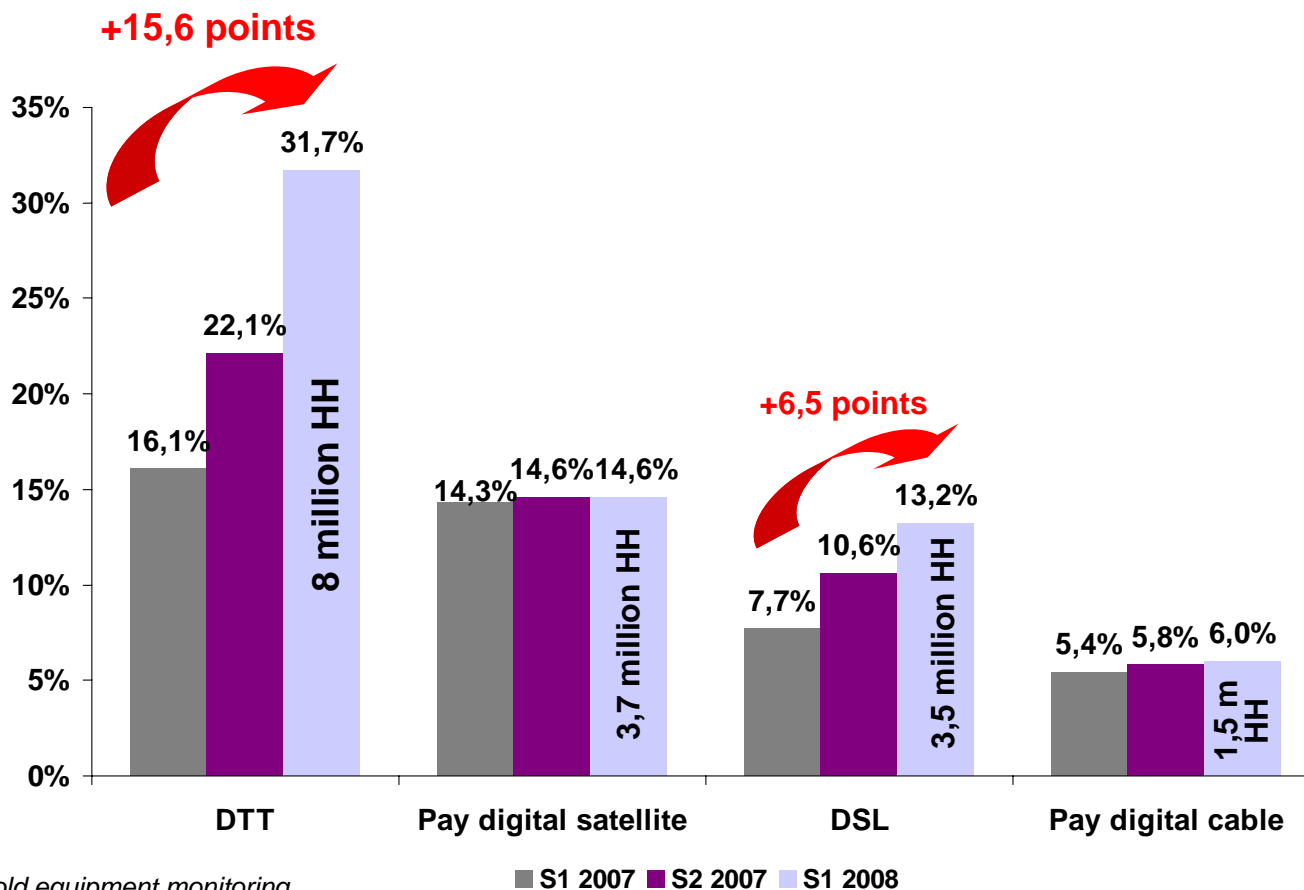


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 - ▶ Standards
 - ▶ Coverage development
 - ▶ Switchover roadmap
 - ▶ The "Coulommiers case": first switchover attempt
- ▶ **Effects on the French audiovisual landscape**
 - ▶ Platforms penetration
 - ▶ Platforms share of market
- ▶ **New digital services**

 - ▶ HD
 - ▶ Mobile TV
 - ▶ And also: digital radio and interactivity

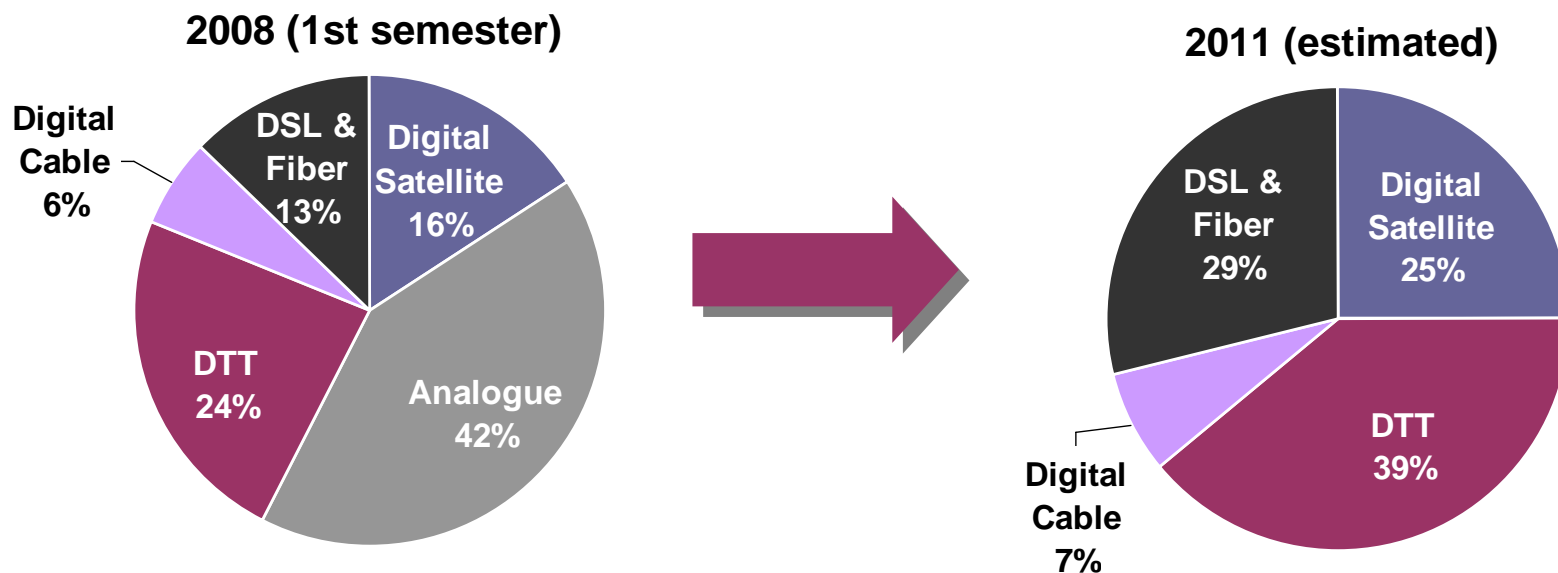
EVOLUTION OF EQUIPMENT

- ▶ In June 2008, 31,7% of French households had a DTT receiver (either TV set or separate set-top box), which is twice as much as in June 2007
- ▶ DSL penetration is also rapidly growing : +6,5 penetration points more than in June 2007



MAIN RECEPTION PLATFORMS SHARES

- ▶ In 2008, terrestrial TV is the main network for TV reception (66%)
- ▶ At the end of 2011, when Analogue is switched off :
 - ▶ DTT will remain the first platform for TV reception (39%) ;
 - ▶ followed by DSL and Fiber (29%), which should continue to grow up (Triple play)



Source: Enders analysis

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- ▶ **Standard: MPEG-4**
- ▶ **HD channels at the end of 2008:**

- ▶ **4 free-to-air channels:**



- ▶ **1 pay channel:**

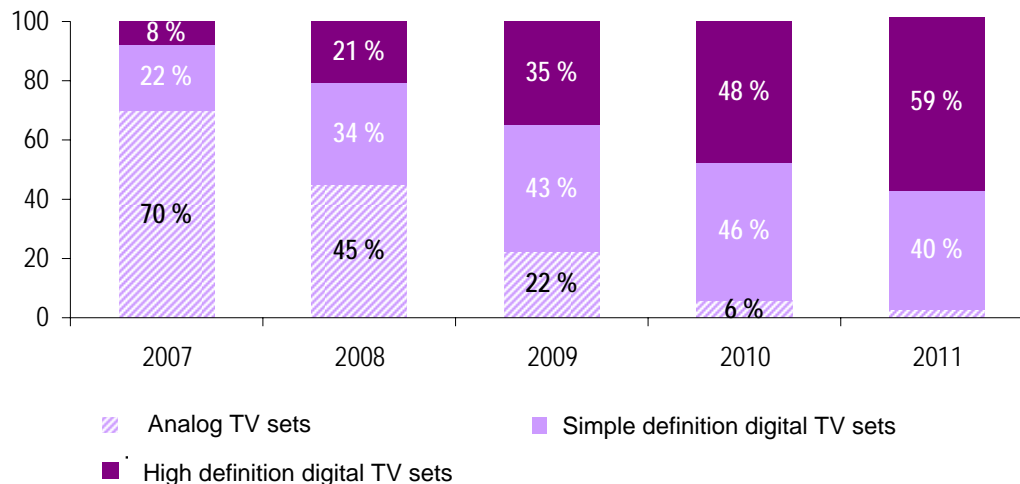


- ▶ **1st December 2008: all HD TV sets and recorders sold will contain a HD DTT decoder**



Households installed TV sets split of

Source : Simavelec



3G mobile TV



"Point-to-point" technology

A few users per 3G cell

Unlimited number of channels

Unlimited use

- Orange: 6€/month (20 channels) or 9€/month (60 channels)
- SFR: 6€/month (22 channels or 8€/month (22 channels + 5 Canal+ channels) or 10€/month (50 Canalsat channels)
- Bouygues: 0,3 €/min



DVB-H mobile TV



May 2008 : 16 channels pre-selected by the CSA

"Point-to-multipoint" technology

Unlimited number of users per cell

Limited number of channels (16 per multiplex)

Business model to be defined: free, fee payment, option subscription to additional premium channels...

DIGITAL RADIO

T-DMB standard

March 2008: 1st CSA call for tender (concerns an area covering 30% of the French population)

Services to be launched hopefully next year

INTERACTIVITY

April 2008 : the CSA launched a public consultation on interactive Mobile TV services

Interactive formats not stabilized yet

Interest of operators about interactivity is rising



Thanks !

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