

Switching to Digital Television: Business and Public Policy Issues*

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London Business School

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1. INTRODUCTION

Television is currently undergoing a major transformation. The old analog standards are being replaced by new digital standards, widely perceived to be technologically superior. Digital television (DTV) makes possible the delivery of a signal virtually free of interference, with better image and audio quality, and improved interactivity. In addition, data compression technologies allow for a more efficient use of bandwidth.¹ DTV gives the flexibility of increasing the quality and the number of channels, while at the same time freeing up bandwidth for alternative uses.²

These benefits can only be realized if broadcasters as well as viewers are willing to invest in the new technology. On the supply side of the market, broadcasters need to invest in digital transmission equipment and make content available on the digital platform. On the demand side, viewers must be able to receive the digital signal either with a decoder (so called 'set top box', STB) or an integrated digital television set. In addition, costs and benefits are unevenly distributed across viewers and broadcasters, and vary depending on the television delivery platform.

Policy makers in the US and Europe have taken a keen interest in the transition process.³ In this paper, we explore the main challenges for the transition to digital television. In particular, we

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¹ With the same bandwidth required for a single analog channel, the new digital technology is capable of transmitting five to ten digital channels of comparable ("standard") quality. Alternatively, that bandwidth can be used to deliver "high definition television" (HDTV) with movie-quality picture and sound.

² In this paper, we do not discuss the different standards for digital television. We refer to Farnoff and Shapiro (1992) for an early account of the development of the ATSC standard in the US, and to Crisman (2002) for a discussion of the development of the DVB standard in Europe. According to Hart (2004) and Galperin (2004), the transition to digital television so far is the result of the interplay of economic and political factors. In this paper, we take the political factors as given and focus mostly on the normative economic implications.

³ For information on the US policies see Congressional Budget Office (1999) and on the EU policies see Commission of the European Communities (2002 and 2003).

Hdtv The Politics Policies And Economics Of Tomottows Television

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