



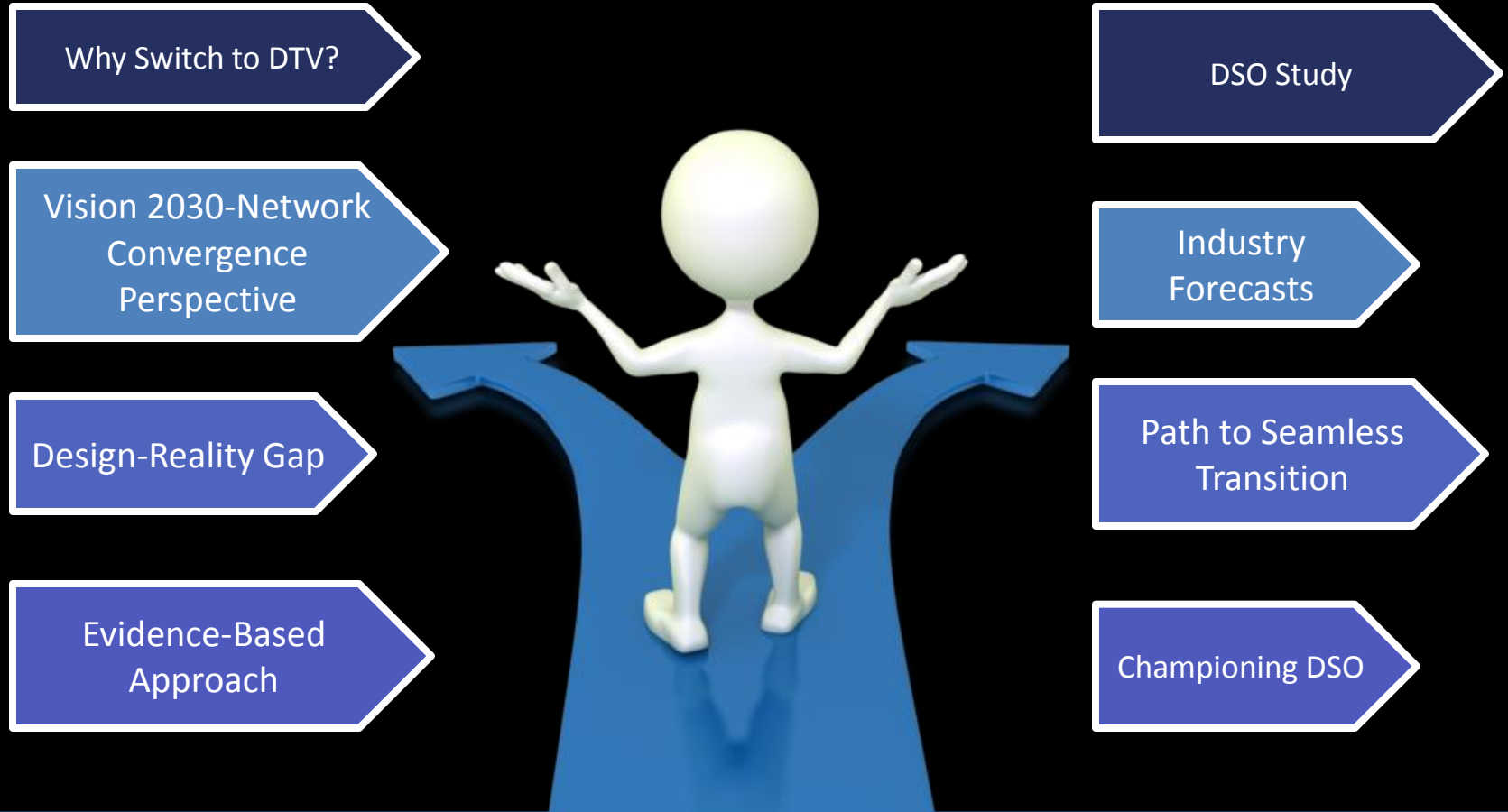
Transition to Digital Television Policy And Regulatory Considerations

CORDEL GREEN

MSB ICT SEMINAR

World Telecommunications Day

Managing the Transition to DTV



Why Switch to DTV?

Vision 2030-Network
Convergence
Perspective

Design-Reality Gap

Evidence-Based
Approach



Richer, more enhanced media
experience

Better technical quality

Opportunities for Next generation
network (NGN) technologies (mobile TV;
wireless broadband; HDTV)

New domestic commercial services



Vision 2030-Network Convergence Perspective

Design-Reality Gap

Evidence-Based
Approach

DSO Study



“Jamaica, the place of choice to live, work, raise families and do business.”

Not possible if we are technology laggards

Transforming business models, leveraging the convergence of telecoms, broadcasting and the Internet



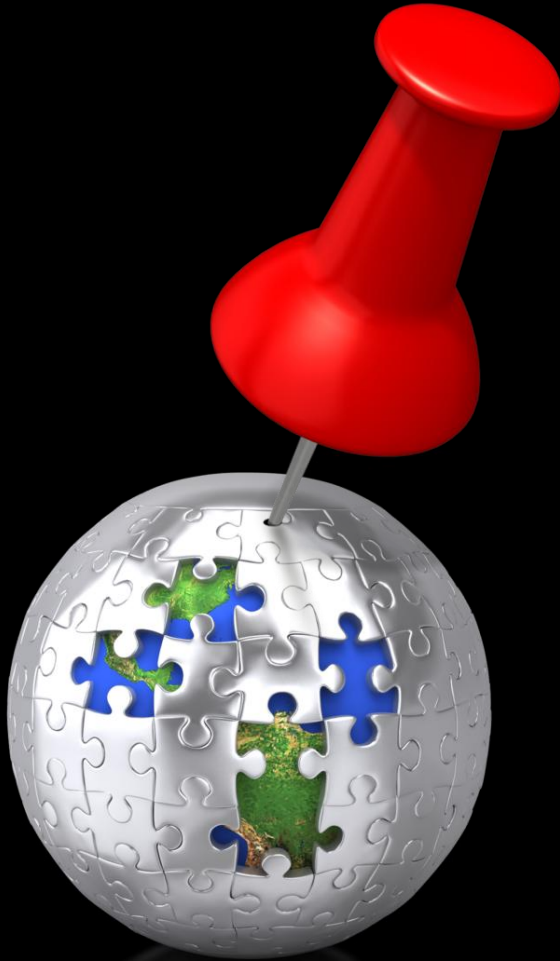
Vision 2030-Network Convergence Perspective

Broadband demand driven by:

Insatiable demand for video content

Collaboration, key plank of network economy

Cloud Computing



Vision 2030-Network Convergence Perspective



DSO can:

Facilitate wireless broadband

Form part of Economic Stimulus Package.



Design-Reality Gap

Evidence-Based
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DSO Study

Industry Forecasts



*'There can be a wide gap between
"hard"/technology approach and reality of
"soft"/human factors (Hard-Soft Gaps) '*

Heeks 2003, p.5



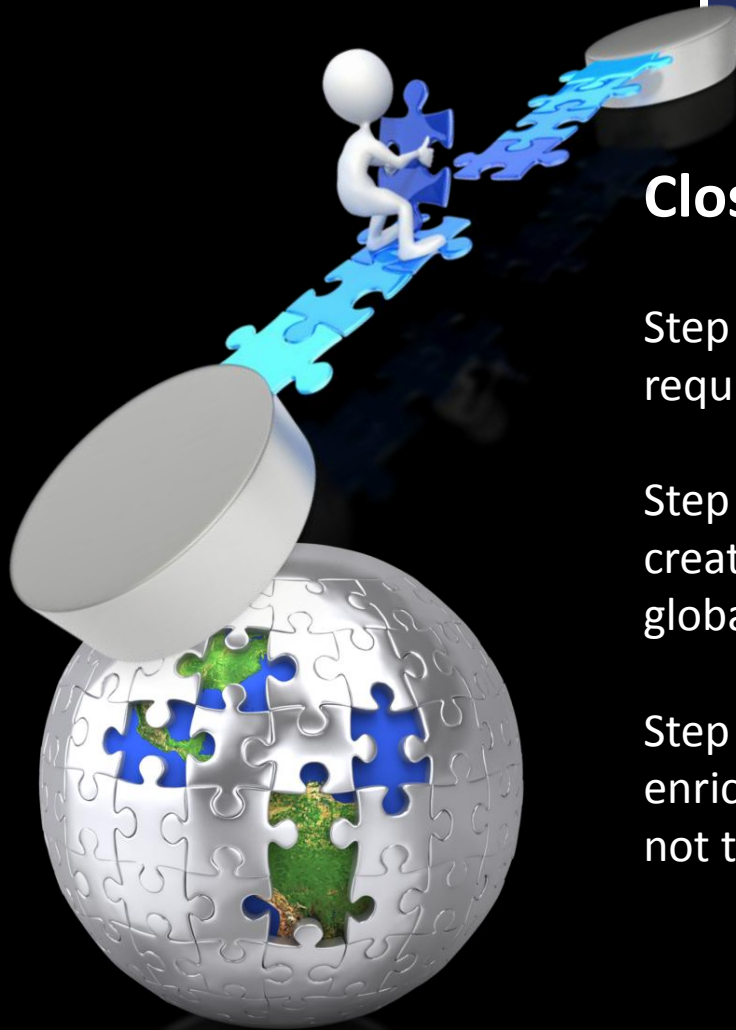
Design-Reality Gap

Closing the Design-Reality Gap:

Step 1: Align existing reality with DSO project requirements .

Step 2: Enlightened Access -innovation and creation of digital products and services for global consumption(Babb 2003, p.3).

Step 3: What will ultimately empower and enrich the poor are “content and applications, not technology” (ADB 2001, p.9).



Evidence-Based
Approach

DSO Study

Industry
Forecasts

Path to Seamless
Transition

Championing DSO

Enormous Costs and Risks of DSO REQUIRE Evidenced-Based Approach:

- Investment in **new digital transmission technology**
- New **production equipment** to deliver new technical quality and features
- **Simulcasting/ Digital technology trials** during the transition period



Evidence-Based Approach



- Inadequate communication (internal and external)
- Inadequately trained staff (e.g. customer service; aerial installers)
- Unavailable funding or expensive sources of funding to cover costs
- High receiver prices
- slow customer take-up



DSO Study

Industry
Forecasts

Path to Seamless
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Championing DSO



Understanding Key market factors:

- Carrying capacity (rate of growth of traditional advertising/potential for growth from new services)
- Model for recovery-market costs
- Sharing the digital dividend



Industry
Forecasts

Path to Seamless
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Championing DSO



DSO Study

Understanding Key market factors:

- Optimal number of providers vs. free planning (“survival of the fittest” market dynamics)
- Take-up of the different platforms (new digital services-substitutes or addition?)
- Level of potential consumer interest in new channels, high definition and/or mobile TV
- Consumer willingness to pay for new services and/or improved technical quality (expected adoption rate by end users).



Industry
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Understanding Key market factors:

- Estimation of how many households are in danger of being directly deprived in respect of :

- their main TV set;

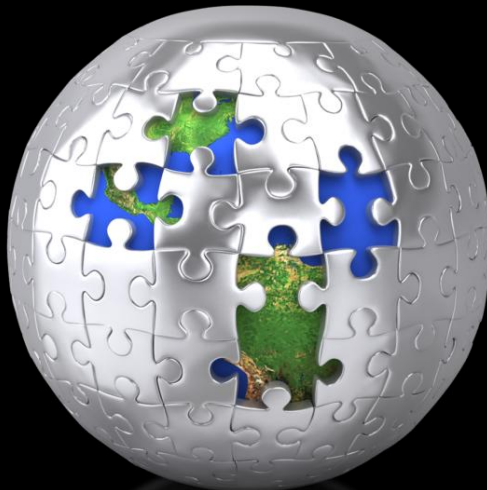
- secondary sets and recording equipment.



Industry
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DSO Study

Understanding Key market factors:

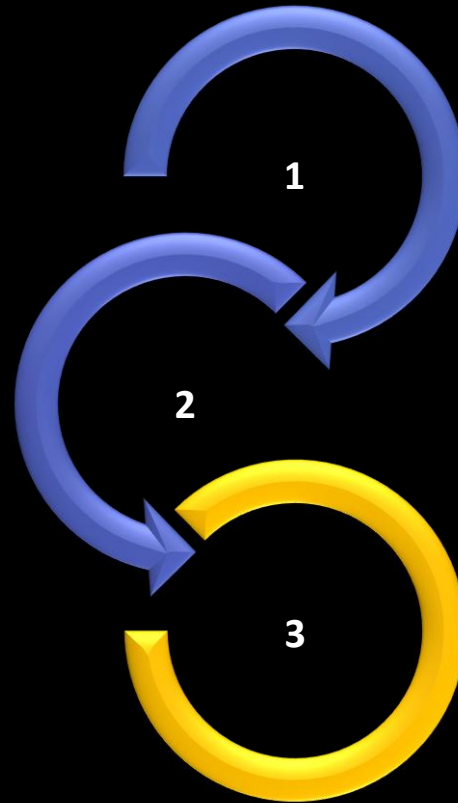
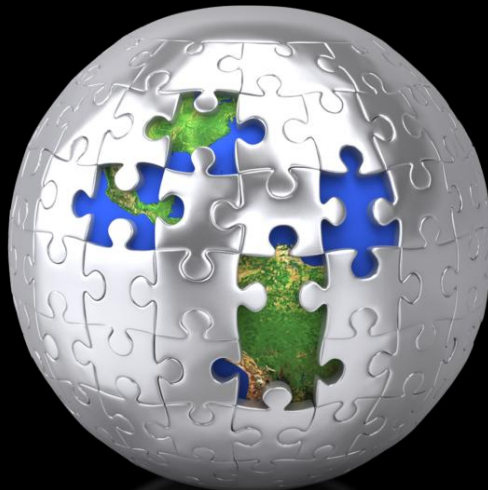
- Estimation of the value of released spectrum.
- Cost points and options for funding
- technology selection
- access and usability by persons with disabilities and other vulnerable groups



Industry Forecasts

Path to Seamless Transition

Championing DSO



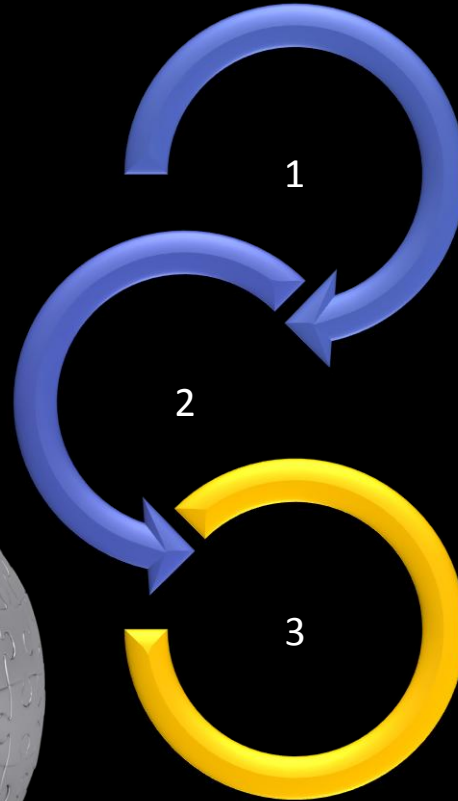
- Growth in digital STV and IPTV market share up to 2018
- Estimated 30,840 households will need subsidy at a cost of US\$1.73 M
- The cost of financing public broadcasting switchover estimated to be US\$5M in 2011, increasing to US\$40M in 2013, and declining to US\$5M in 2015



Path to Seamless
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Industry Forecasts

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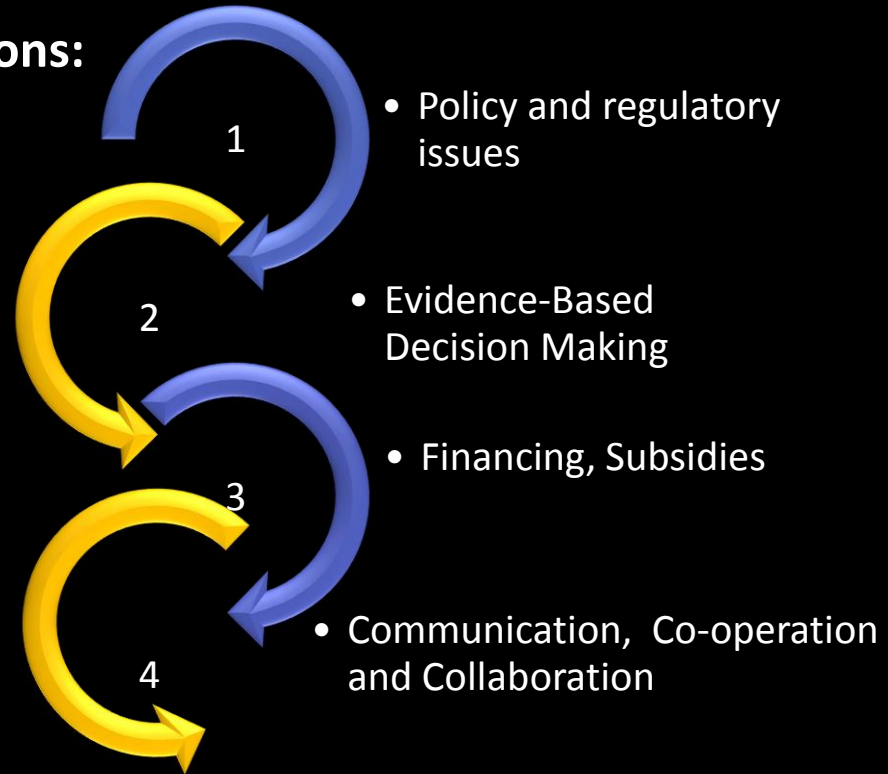
- MPEG 4 will be the preferred video coding standard and not MPEG 2.
- ATSC will be the preferred transmission standard.
- Existing players will share transmission facilities but want opportunity to be multiplex licensees



Path to Seamless Transition

Championing DSO

Key Decisions:



Championing DSO

ONE GAP IN DSO PROCESS IS THAT THERE ARE ENOUGH CHAMPIONS WHO HAVE INFLUENCE, BUT A SHORTAGE OF CHAMPIONS WHO HAVE POWER

Needed...

...A **Powerful** Champion who is **Olympian** in thought and **Transformational** in action!





THANK YOU

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