



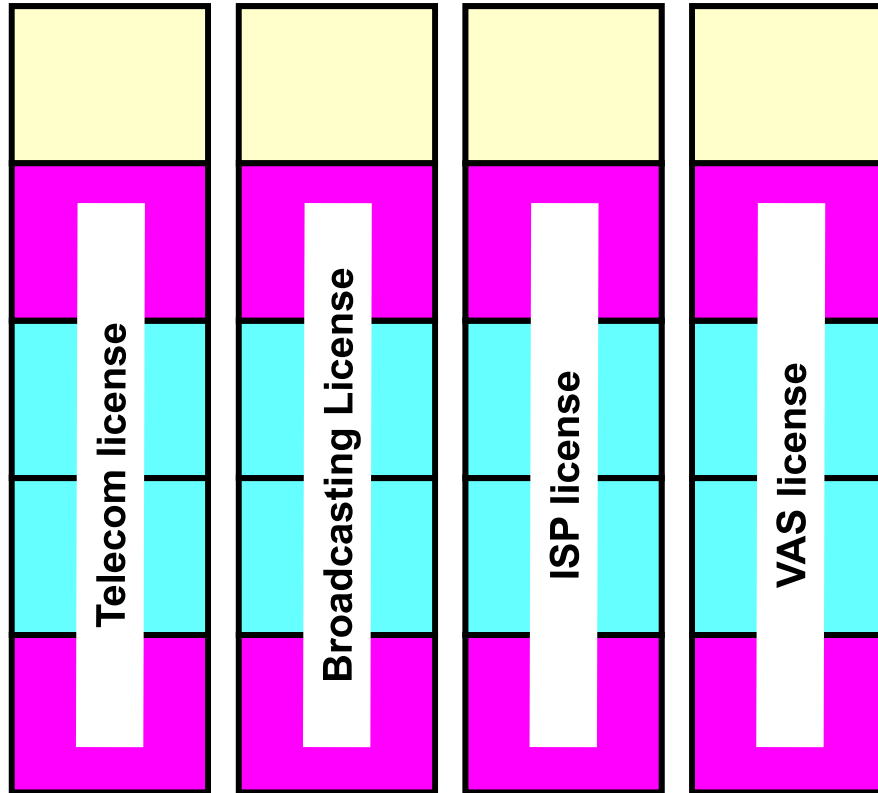
Open Access, Incentives and Superhighway

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Open Access in Asia

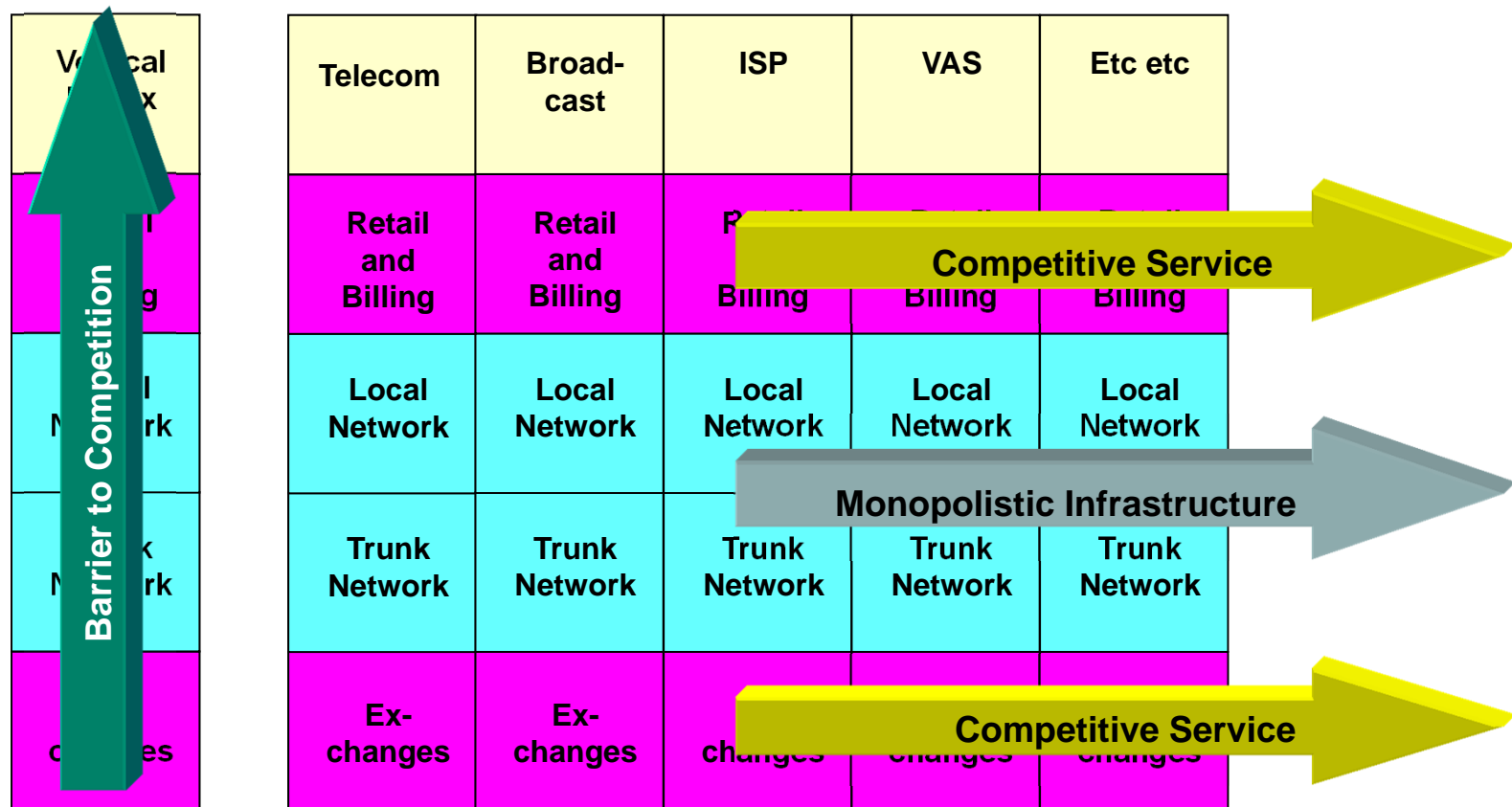
- Open access:
 - wholesale networks must interconnect with networks, many owned by bundled (network and services) utilities
- Many ideas are hangovers from fixed line monopolies
 - can incumbents be encouraged to allow access to competitors?
 - origin of the problem and solutions
- This presentation shows that many problems are a legacy of fixed utilities acting as monopolists
- Broadband is forcing change, understanding drivers can speed it up
 - broadband is creating a natural separation: networks - services

Vertical Organisation technology based



- Licenses followed the vertical matrix,
- Matrix was based on technologies,
- Response was to block competition,
- Infrastructure “a competitive advantage” and a barrier to competition

Services Bundled with Infrastructure blocked Competition

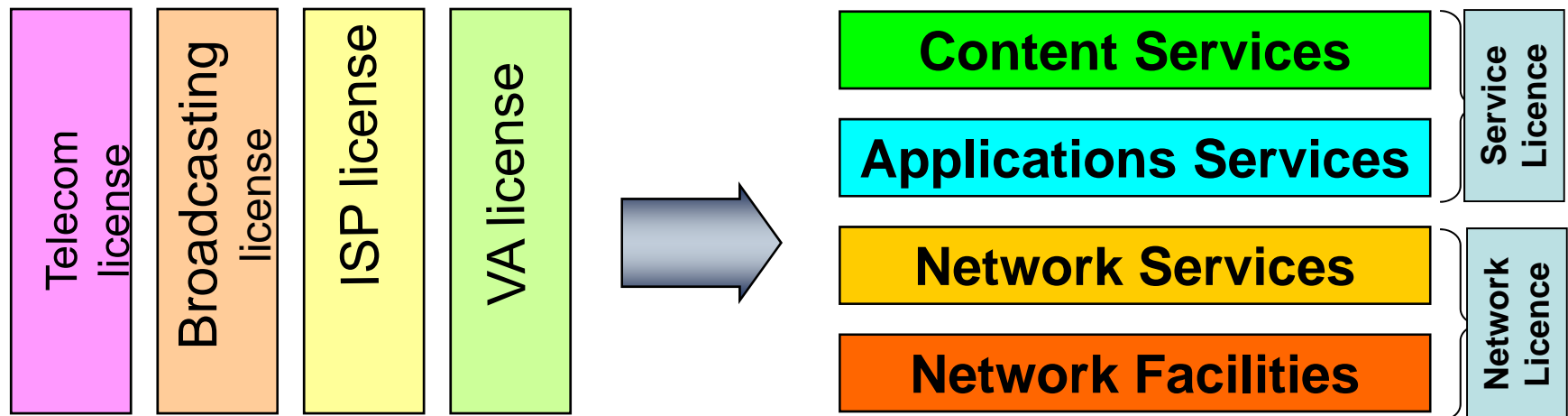


**Broadband separates infrastructure and services
Creates a Platform for Competition**

Technology Neutral Licensing

Old licenses were issued based on specific technologies, and services

Began in Malaysia and Singapore
Technology-neutral; service-neutral



A particular service through a designated technology and vertically integrated for the provision of that service

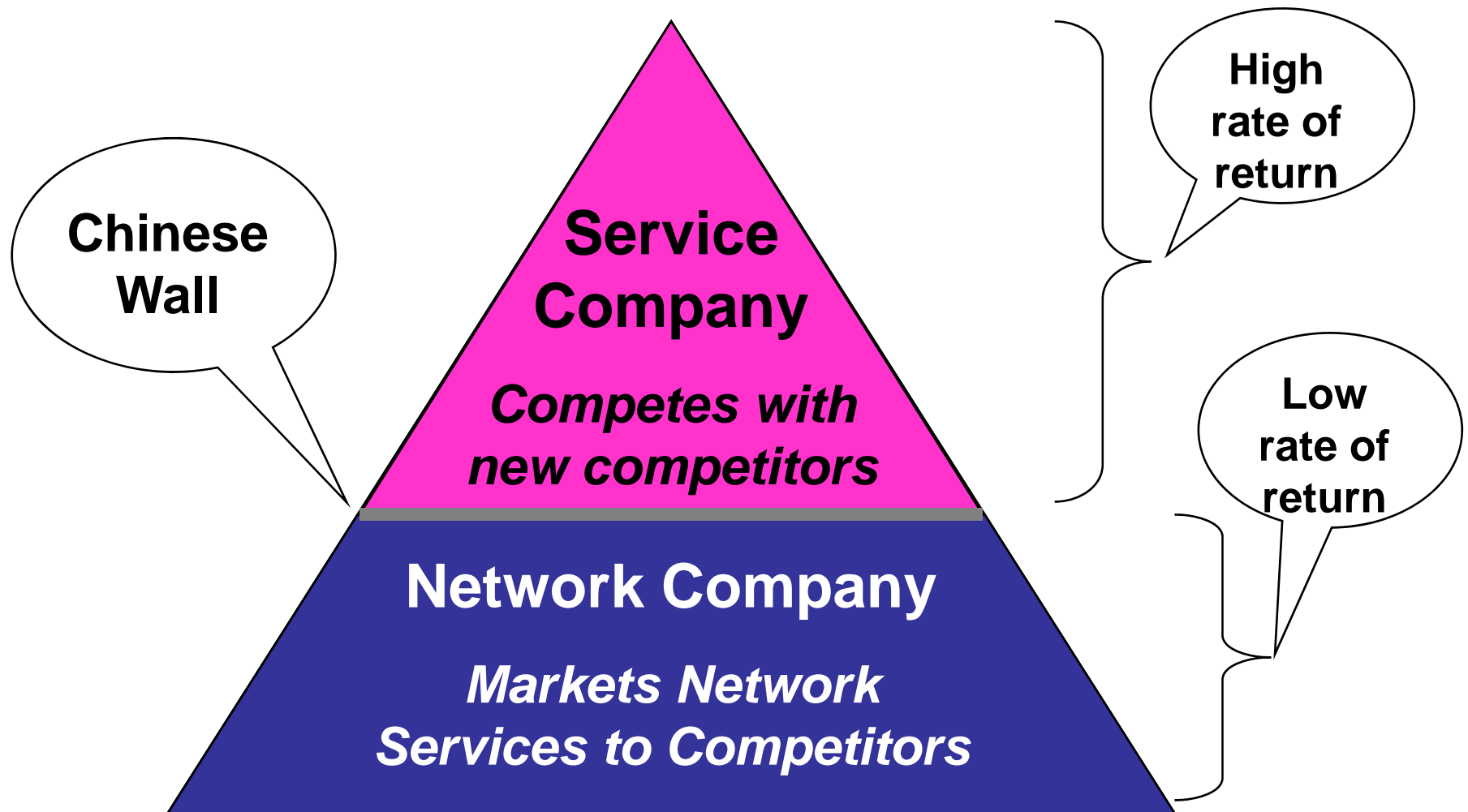
The technology neutral framework promotes vertical separation between facilities, network, applications, and content

Different Business Characteristics mean that different investors are required

	Network Company	Service Company
Product Life	long	short
Complexity	low	high
Information	public	private
Risk	low	high
Return	low rate	high rate
Capital Required	high	low
Best Investor	low risk pension fund	high risk venture fund

Facilities and cable sharing - Split Retail

Hong Kong and UK, Australia and New Zealand – shared towers India



https://www.yunbaogao.cn/report/index/report?reportId=5_5029

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NETCO – SERVCO Demarcation

