

动态环境下 中国电信企业竞争优势

◎ 张振辉 著

A Study On the

Competitive Advantages

of Telecom Enterprises

in China under A Dynamic Environment



中国财政经济出版社

动态环境下

中国电信企业竞争优势

**A Study on the Competitive Advantages of Telecom
Enterprises in China under A Dynamic Environment**

张振辉 著

中国财政经济出版社

图书在版编目 (CIP) 数据

动态环境下中国电信企业竞争优势/张振辉编著. 北京: 中国财政经济出版社, 2005. 1

ISBN 7-5005-7810-5

I. 动… II. 张… III. 电信-邮电企业-市场竞争-研究-中国 IV. F632.1

中国版本图书馆 CIP 数据核字 (2004) 第 133072 号

中国财政经济出版社 出版

URL: <http://www.cfeph.com.cn>

E-mail: cfeph@cec.gov.cn

(版权所有 翻印必究)

社址: 北京海淀区阜成路甲 28 号 邮政编码: 100036

发行处电话: 88190406 财经书店电话: 64033436

北京财经印刷厂印刷 各地新华书店经销

787×960 毫米 16 开 17.5 印张 255 000 字

2005 年 1 月第 1 版 2005 年 1 月北京第 1 次印刷

印数: 1—2 000 定价: 32.00 元

ISBN 7-5005-7810-5/F·6859

(图书出现印装问题, 本社负责调换)

内容摘要

随着经济全球化和全球信息化的推进，社会对信息的依赖越来越大，信息的创造、加工、处理和传递成为经济增长的重要源泉，作为信息主要传递载体的电信业的战略地位愈发重要。在 21 世纪，没有我国企业的强大，就没有国家的富强。从某种意义上说，一国的国力决定于该国企业的总体竞争力。电信业是国民经济的基础性产业和战略性产业，对国民经济的发展、国家经济安全以及国家主权的维护具有十分重要的意义。当前，世界电信业已进入到全球竞争时代，在这场正在进行的电信业国际化进程中，如何培育具有国际竞争力的本国电信企业，获取全球电信市场竞争优势，已成为世界各国提升综合国力和密切关注的问题。国外关于电信企业竞争优势的研究尚没有形成系统完整的体系，我国国内的研究也没有实质性进展。研究电信企业竞争优势理论，探讨动态环境下我国电信企业核心竞争力问题具有十分重要的理论和实践意义。

本书采用理论与实践相结合、静态分析与动态分析相结合、实证分析与规范分析相结合等方法，构建了一个企业竞争优势的新整合模型，以此作为分析电信企业竞争优势问题的理论基础，对电信企业竞争优势的识别、评价、营造、持

续、保护过程进行系统研究，并实证分析了我国电信企业竞争优势问题，提出了可操作的对策建议。在以上分析框架中，本书取得了一些主要研究成果：

(1) 解读动态环境下我国电信企业竞争环境。

通过比较研究世界电信市场竞争发展历程，明确了我国电信运营企业的市场定位——国内市场竞争初步形成阶段。以我国电信业第四次制度创新为基点，通过比较研究世界电信政府管制历程，透析我国电信业政府管制体制改革由严格趋于放松的路径变迁进程。电信技术变革是推动整个电信业发展的源动力，不但创造需求，还深刻地改变着电信价值链的每个环节。电信产品生命周期变短，投资回收期变短，投资风险加大。投融资环境的变革使我国电信业内源融资所占比重呈现不断下降趋势，结构性融资缺陷问题愈发突出，外资和民营资本进入电信资本市场，将改变我国电信企业的融资结构和投资方式。电信价值链裂变深刻影响电信业的传统运营模式，价值链裂变后，电信市场趋于细分化，电信市场竞争重心呈现出向电信价值链的后端转移的趋势，电信业全价值链市场竞争格局基本形成，随着技术进步和业务融合，电信企业间的竞争将不再局限于单一的业务市场，而是全方位、多业务的竞争。加入 WTO 后，外资进入我国电信市场参与竞争，国内市场国际化，国际市场国内化，竞争深度将更加激烈，竞争幅度将拓宽，激烈的竞争使电信价值链呈现连接紧密化的趋势。

(2) 构建企业竞争优势分析新范式。

通过比较研究竞争优势领域中具有代表性的比较优势理论、国际直接投资理论、波特产业分析理论、企业能力理论，以及战略冲突理论、现代超越竞争理论等，本书突破了传统的“点状”或“线状”竞争优势分析模式，运用系统的、互动的思想将环境与定位、资源与能力、核心竞争力的构建与提升等战略要素整合在一起，构建了“网状”的、多层面的企业竞争优势新模型。本书认为，企业获取竞争优势，除了要在价值链的某个（或几个）环节具备足够的核心竞争力外，更为重要的是还要把准确

(3) 系统研究电信企业竞争优势问题。

3

购与联盟网络问题，认为在确定核心竞争力外部获取战略主题时，不但要关注企业内部的现有资源与能力，还要重视外部环境中的资源要素市场，不但要考虑外部获取资源与能力所带来的收益，还要兼顾外部获取所带来的文化冲突、沉淀性资源与能力、知识溢出等各种风险，不但要关注并购与战略联盟的前整合问题，还要重视获得资源与能力后的后整合问题。

(4) 实证研究我国电信企业竞争优势问题及对策建议。

通过实证研究我国电信企业的核心竞争力，提出对策建议：在动态环境下实施核心竞争力战略；整合电信价值链，实施价值链群管理；重视核心竞争力建立过程中的动态性和持续性问题；重视无形资源在电信企业战略资源营造过程中的作用；构建电信企业的学习型组织；实施全方位关系营销战略；“竞合”制胜；站在国家安全角度培育具有足够国际竞争力的我国电信跨国企业。

Abstract

With the ongoing trend of globalization of economy and informatization, the generation, modification, processing and transmission of information has been regarded as a very important root of economic growth. Thus telecommunications, as a main information transmission tool, has become more and more important strategically. Telecommunications, as the strategic industry that functions as the foundation of the nation's economy, has a high – lightened importance. In the development of the nation's economy; the state's economic security and national sovereignty. At present, telecommunications in the world has entered into a era of competition internationally. And in the ongoing globalization of telecommunications, the problem of how to build up a internationally competitive telecommunications enterprise in the country, so as to take a advantageous stand in the global market has been given close watch because its relationship with the improvement of the comprehensive power of the country. The research on the competitive advantages and the competitive core of telecommunication enterprises in a very actively changing environment has both its theoretical and practical significances, for there is not

any systematical analysis on the competitive advantage of telecommunication – enterprises either home or abroad.

This article take a multifaceted way of analysis (i. e. analysis based on both theory and practice; both example and norm; both statically and dynamicaly;) thus draws a brand new model of reformation that is startlingly competitive. This functions as the theoretical basis of the analysis on the advantageous points of telecom enterprises. Meanwhile, this article also did some systematical research on the recognizing, ideas, construction sustain and protection of telecom enterprises. The article also made some advice on this. In the above – mentioned framework, there are a set of new concepts, new theory and new ideas.

Analysis on the competitive environment that telecommunications enterprises are faced with in the country.

A clear orientation of the telecommunications enterprises operating in the market is made based on research on the development of the global telecommunications market. That is, a competitive market in the country has just been formed. The track of government's reform on the administration is also thoroughly talked about. Based on the 4th innovation project of telecom, and the research on government's administration of telecom, we can draw the conclusion that government's administration has been lead on a looser and looser trend. The innovation of telecom techniques being so important that it is the headspring of the development of telecom; it not only generates need, but also deeply changes every sector on the telecom value chain; the life span of telecom products being shortened, the circulation of capital invested become faster, and thus the risk of investment would be increased. The reform of investment environment increasingly eliminate the proportion of investment from home, structural problems on investment becomes worse and worse. Foreign and domestic private capital entered into the telecom market, changing the investment structure and method. The traditional operation style has been deeply influenced with the fission f telecom; there is a more detailed division of telecom; the competition core moves towards the end of the value chain; the pattern of the grand value chain has been formed; the competition has been changed into one that covers all business and from all

direction, in comparison with competition of just one kind of business. With China entering onto WTO, more and more foreign investment is entering into the telecom market, thus intermingling the domestic and international markets. Competition will be more fierce, on a wider range. Fierce competition leads to a more and more closely related telecom value chain.

Building a new framework of “analysis on the competitive advantages” of telecom.

The article broke through the traditional model of analysis and inventionally created the new model of competition between enterprises, based on research on the noticeable theories: “comparative advantages”, “international direct investment”, “Porter Business Analysis”, “capacity of enterprises”, “strategic conflicts”, “modern super – competition” and a combined entity of different episodes, including combination between environment and orientation, resources and capacity, the construction and enhancement of competition core. The points of view of this article are: in order to take a advantageous stand, business should not only hold the competition core in one or several sector of the value chain, but more importantly, they should combine the following two factors organically: 1. a lucid strategic foal for development, correct market orientation and analysis on environment. 2. the competition core created with the strategic resource of the business and core capacity. Meanwhile, it also interact with the fast changing environment; it continues to consolidate the original competition core; it builds up and obtain new core competition power; it reaps a sustained competition advantage in a increasing circulation.

A systematical research on the competition advantage of telecom enterprises.

A systematical research on the resource, capacity of telecom enterprises as well as the forming and evolution mechanics of core competition power has been carried on in this article. It expounds for the first time about that the core competition power is an organic combination of strategic resource and core capacity.

It constructs the model of sustainable competition advantage that is formed with strategic resource and core capacity. It creatively introduces the idea that the “active core competition power” is the headspring of a sustainable competition advantage. It reveals the three core elements of core competition power: key techniques, organization and convergence. It also creatively made a model for the recognizing and evaluation of core competition power in telecom enterprises. In the process of recognizing and evaluation, the methodology of orientation analysis and nation analysis are jointly employed. Besides the orientation analysis of inner value chain and outer value chain, the way of blear comprehensive analysis is also used to facilitate the process. It also build the model of how to nurture such an core competition power including strategic theme, inner cultivation and outer obtainment, dynamic combination and superior competition group. The article holds that two ways could be employed to build up the core competition power of telecom enterprises, i. e. inner accumulation and training, and outer obtainment and construction. In order to sustain a continuous competitive advantage in a dynamic surrounding and create our own “super – eminent business”, telecom enterprises should set up the goal of creating the grandest customer chain and obtaining our own competitive advantage in a dynamically competitive environment. They should also keep on innovation; build up a model organization and a enterprising business culture; renovate the strategic resources and core power from time to time; continuously build up a superior competition group with the help of a dynamically formed core competition power. In this article, a model, which describes the process of the sustenance and protection of the competition advantages in telecom enterprises is also invented. The threat factor and segregation mechanic as well as the problem of sustenance and protection of telecom enterprises in a dynamic environment is also talked about in this section. It creatively builds up the capacity obtainment model and resource including strategic theme, post – convergence management, and competitive advantages. It analyzed the problem of the merging of telecom enterprises and alliance network from

a new prospective of resource and power. The article also holds that in deciding the strategic theme of obtaining core competition power, the already existing resource and power inside a enterprises should also be paid attention to. in addition to attention on the benefits brought about by outer resource and power, attention on various risks brought about by culture conflicts; resources and power deposit as well as knowledge overflow should also be given. Not only the pre – convergence problem of merging and strategic alliance should be paid attention to, the post – convergence problem including the obtainment of resource and power should also be paid attention to.

A positive research on the competition advantages of the telecom enterprises in China, and some corresponding advice.

After a positive research on the competition power of telecom enterprises in the global market, some relevant advice is put forward: to carry out a strategy of core competition power in a dynamic environment; to carry on a management on the system of various value chains after the convergence of telecom value chains; to emphasize the dynamic and sustainability problems in the process of building up core competition power; to pay much attention on the use of abstract resource in the process of building strategic resources of telecom enterprises; to make a model organization of telecom enterprise; to carry out a sales strategy on various respect; “to win with the competition and merging mechanic”; make a trans – country telecom enterprises with enough international competition power on the respect of “national security”.

目 录

第 1 章 导 论	(1)
1.1 研究背景	(1)
1.2 电信竞争优势国内外研究现状	(7)
1.3 研究思路、框架与创新	(13)
1.3.1 研究思路	(13)
1.3.2 结构框架和研究方法	(14)
1.3.3 创新之处	(15)
第 2 章 环境变革中的中国电信业	(18)
2.1 电信业概念的界定	(18)
2.1.1 关于电信	(18)
2.1.2 电信产业的产生	(19)
2.1.3 电信产业的分类及概念界定	(19)
2.2 电信业的技术经济特性	(20)
2.2.1 电信产业的技术特性	(20)
2.2.2 电信产业的经济特性	(20)
2.2.3 电信业的自然垄断性	(22)
2.3 电信业发展与演进路径分析	(24)

2.4 电信业政府管制与放松变迁路径分析	(25)
2.5 我国电信企业运作环境的变革	(29)
2.5.1 技术环境的变革	(29)
2.5.2 投融资环境的变革	(31)
2.5.3 管制环境的变革	(36)
2.5.4 市场环境的变革	(39)
本章小结	(46)
第3章 企业竞争优势理论综述与新整合模型	(48)
3.1 企业竞争优势理论综述及评价	(48)
3.1.1 比较优势理论的观点评述	(48)
3.1.2 国际直接投资理论的观点评述	(50)
3.1.3 波特的产业分析理论的观点评述	(51)
3.1.4 能力理论的观点评述	(54)
3.1.5 其他学派关于企业竞争优势的观点评述	(61)
3.2 动态环境下企业竞争优势新整合模型	(62)
3.2.1 动态环境的形成与界定	(64)
3.2.2 模型中战略要素的构成与描述	(64)
3.2.3 战略要素模块间协同互动	(72)
本章小结	(76)
第4章 电信企业竞争优势分析	(78)
4.1 电信企业外部环境分析	(78)
4.1.1 电信企业外部环境的界面划分	(78)
4.1.2 考察电信企业外部环境的分析工具	(79)
4.1.3 考察电信产品生命周期和利润情况	(80)
4.2 电信企业的资源、能力与核心竞争力	(80)
4.2.1 企业的竞争力架构	(80)
4.2.2 电信企业的资源构成与战略资源保护	(82)

7.1.3 我国电信产业国际竞争力已有研究成果	(195)
7.1.4 我国电信运营企业国际竞争力分析	(198)
7.1.5 我国电信设备制造业国际竞争力分析	(203)
7.1.6 当前我国电信企业的劣势与存在的问题	(206)
7.2 电信企业竞争优势实证分析	(207)
7.2.1 A 公司基本现状	(207)
7.2.2 外部环境分析	(207)
7.2.3 内部资源与能力分析	(211)
7.2.4 核心竞争力分析	(212)
7.2.5 战略及对策	(215)
7.3 增强我国电信企业竞争优势的对策建议	(216)
本章小结	(229)
第 8 章 主要结论及需要进一步研究的问题	(231)
8.1 主要观点及结论	(231)
8.2 需要进一步研究的问题	(240)
参考文献	(242)
后 记	(261)