

● 崔万田 / 著

发展中国家

电信业

竞争优势路径选择

FAZHANZHONG GUOJIA
DIANXINYE JINGZHENGYOU SHI
LUJING XUANZE



经济科学出版社

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序

崔万田博士的专著《发展中国家电信业竞争优势路径选择》，是一部选题颇有新意的作品。它是在其博士论文的基础上修改而成的，不仅是近年来国际电信领域较有特色的论著，也是世界经济研究方面有意义的尝试。作为本书作者的导师，我为本书的出版写序，内心充满喜悦。

席卷全球的电信改革浪潮为世界电信业的发展提供了前所未有的发展空间，也成为人们普遍关注的焦点。特别是发展中国家电信业面对全球的电信竞争，如何选择发展路径，是一个从理论到实践都值得关注的问题。作为一名年轻的学子，面对一个较为复杂的微观层面的选题，如果缺乏对电信业的深入调研是难以胜任的。作者以极大的勇气、较为扎实的理论基础、具有特色的研究方法与丰富的行业资料，创造性地完成了这项研究工作。我把本书具体内容的评析留给读者，这里只谈一点看法。

应当说，对于生活在现代社会的人们来说，也许没有哪个行业像电信业这样影响着几乎每一个人的工作和生活。尽管学术界的相关研究不断深入，但对发展中国家电信业的研究尚处于初始阶段。一般而言，学术界对此类课题的研究基本上以电信本身的行业规律或以单个国别研究为主，很少有人把国别分析与产业分析有机地结合起来，

并运用经济学的工具进行整体分析。该书以发展中国家电讯业如何选择竞争优势路径为研究起始，通过对网络经济技术规律与发展中国家制度条件的分析，论述了发展中国家电讯的状况和开放互动式的制度变迁对发展中国家电讯竞争优势构建的意义。这不失为一次较为大胆的理论尝试。

崔万田博士以新制度经济学与网络经济学为基本分析工具和理论假设框架，以发展中国家电讯业的技术与制度的供给与需求不均衡为分析主线，首先对发展中国家电讯业的制度环境深入剖析，推导出“低效率制度供给循环”的假说。接下来，对电信业本身的技术特点、发达与发展中国家的电信发展进行实证研究，进而得出开放互动式改革是发展中国家获取竞争优势的更优路径的基本结论。该书突破了电信业发展的技术决定论的观点，特别强调了制度创新对电信业发展的作用，指出网络经济时代最不易获取的是需要更长时间形成的制度环境等资源。在对电信业特征的分析中，该书突出了世界经济整体制度状况和特点对电信行业的影响。针对中国电信业发展，指出技术开放与制度开放的失衡是造成中国电信的基础网络超前建设与管理制度建设严重滞后的根本原因。这些见解对于解释和解决中国电信业的改革与开放具有一定的借鉴意义。

作者面对相对现实性较强的微观选题，在研究方法上也刻意创新。一方面注重运用实证与逻辑分析等纯理论的分析方法，另一方面也注重运用经验分析与对策分析等结合实际的分析方法，以避免脱离实际的主观推论与理论的空洞假设，力求具有理论的严密性和现实的可信性。

当然，由于发展中国家电讯业的发展正处于日新月异的成长期，针对本问题的研究也有待深入，在材料获取与理论积累等方面都缺乏更为坚实的基础。这些因素对进一步研究发展中国家电讯业造成了许多障碍，也决定了本书必然存在一些不足之处，有待读者批评修正。

特别需要指出的是，池元吉、佟家栋、周新诚、冯舜华、金明

善、赫国胜教授都曾对本书给予较高的评价，并提出许多宝贵的修改意见。本书所展现出的研究水准，离不开这些专家学者的帮助与指点。

崔万田从1999年开始跟随我攻读世界经济博士研究生，他不仅勤于思考，刻苦钻研，勇于实践，大胆创新，在理论与实务两方面都取得了较大的进步。我希望，作为一名年轻的学子，他应以本书为起点，不断进取，获取更大的收获。

程伟

2003年11月16日

内 容 提 要

20世纪80年代以来，随着信息技术日新月异的发展，信息经济对世界经济的影响越来越大，作为信息经济的主干之一，电信业的发展成为人们普遍关注的焦点。席卷全球的电信改革浪潮为世界电信的发展提供了前所未有的成长环境，几乎所有的发展中国家都把电信业列为优先发展的产业，如何提升电信业的竞争力已经成为发展中国家进一步发展的重要课题。本书围绕发展中国家电信业竞争优势路径选择问题，试图为发展中国家电信业的发展提供一条有价值的思路。

本书的分析主要包含三个议题：

1. 发展中国家电信业竞争优势的路径选择由发展中国家电信业的制度供给状况与创新能力所决定。

2. 与先进的电信体系开放互动的程度和发展中国家电信业的发展正相关，也是发展中国家获取竞争优势的惟一路径选择。同时，局部行业的制度创新对发展中国家整体的制度变迁的影响是动态的。

3. 上面两个方面在中国的电信改革中体现明显，对进一步的改革具有指导意义。

具体地讲，本书分为五章。第1章构建发展中国家电信业的“低效率制度供给循环”假说，为分析发展中国家电信的路径选择提供理论基础；第2章分析电信业的经济技术特征与国际发展经验，为全书提供实证依据；第3章对发展中国家的电信现状，特别是其电信的需求与供给状况进行深入分析，为发展中国家电信竞争优势路径的选择提供现实基础；第4章比较内部拆分与开放互动两种改革方式，提出本书的核心论点，即开放互动式改革是发展中

国家电信的竞争优势路径；第5章是关于中国电信发展的若干理论与政策思考，提出本书关于WTO后中国电信业的竞争优势构建的若干观点。

这一研究，具有以下特点：

其一，本书为发展中国家电信的研究提供了一种新视角。以往，学术界对发展中国家电信业不仅研究不够，而且基本以电信本身的规律为主，停留在总结与综述的状况方面。本书设定以发展中国家电信如何选择竞争优势路径为起始，以发展中国家电信（这一类似群体的相同行业）如何在电信的全球竞争中找到一条具有优势的发展道路为分析焦点，通过对网络经济与发展中国家的基础特征、条件的分析，论述了发展中国家电信的状况和开放互动式的制度变迁对发展中国家电信竞争优势构建的意义。这在学术界是一种新的尝试。同时把国别分析与产业分析有机地结合起来，使得我们对国内电信问题的分析更为开阔，从一个行业的角度更为深刻地把握发展中国家的本质特征与基本内涵。

其二，全书的分析建立在一个理论假设框架下，使得全书形成了较为严谨的逻辑体系。首先把电信放入网络经济的生产力背景下，分析决定竞争力量对比的是制度方面因素，然后，通过对发展中国家电信业的制度分析推出“低效率制度供给循环”假说的理论框架。接下来，对电信业本身的特点、发达与发展中国家的电信发展进行实证检验，进而得出开放互动式改革是发展中国家获取竞争优势的惟一路径的核心主题。全书形成了理论框架——实证检验——实证效果——政策拓展这样一种前后紧密衔接的逻辑体系。

其三，本书强调了实证分析，并灵活地使用了多种分析方法。本书面对的是相对现实性强的命题，一方面注重运用理论实证、静态与动态分析、逻辑分析与比较分析等纯理论的分析方法，另一方面也注重运用经验分析与对策分析等结合实际的分析方法，根据对象和内容的需要，把各种分析方法有机地统一起来，避免主观推论与理论的空洞假设，力求全书的分析与结论具有理论的严密性和现实的可信性。

其四，对国内争议很大的中国电信改革，在本书理论框架下，进行了分析，有助于突破对开放互动式电信改革固有的狭隘思路。

本书围绕发展中国家电信业竞争优势路径选择这一主题，尝试性地提出

了一些新观点。

第一，本书通过对发展中国家电信业所处的制度环境与安排的分析，运用制度经济学的制度变迁理论的工具，提出了发展中国家电信业的“低效率制度供给循环”假说。并从制度创新路径选择的角度，提出了与先进的电信制度体系开放互动，是发展中国家电信打破原有的低效率循环状况的惟一方式的观点。在分析如何提高发展中国家电信竞争力的问题上，原有的制度状况不再是外生给定的。不仅如此，本书特别强调了制度创新对电信业发展的根本作用。这一点，与当前的关于发展中国家电信业的分析思路与结论有着鲜明的差异。同时，本书在整体对电信的分析中，一贯性地强调了技术的变化与创新不仅为全球电信发展提供了动力，而且离开了世界经济制度创新，电信业的飞速发展也是不可能的。另外，本书关于全球整体制度环境对各个国家的制度安排影响的论述，突出母制度体系与子制度体系的互动关系的论点，为作为一个行业的电信业面向开放的制度变迁的全局意义提供了进一步的支持。

第二，传统的网络经济分析强调技术进步的作用。本书大胆提出了网络经济的特征，决定了网络经济的竞争规则更根本的方面在于制度的供给与创新能力。指出网络经济时代是不易交易资源的竞争，而最不易获取的资源是需要更长时间形成的制度等资源。这一分析基础为本书的核心理论部分和进一步的政策建议提供了前提，也为发展中国家选择开放互动式电信改革这样的以制度创新为突破而非一味依赖技术进步的传统思路提供了证据。

第三，在对电信业特征的分析中，本书提出了世界电信业的制度安排状况不仅是由技术条件决定、并由技术进步推动的，而且还要看到世界经济整体制度状况和特点对电信行业的影响。国有与垄断的制度安排不仅是由电信业的自然垄断的经济特征所决定，而且还与当时的世界性国家垄断的制度选择有关；同样，电信自由化浪潮不仅是技术飞速发展的结果，而且更是由冷战后经济全球化的世界总体制度变迁方向的市场化、自由化所决定。

第四，本书提出了制约发展中国家发展的是制度供给与创新不足，这与通行的需求不足制约电信发展的观点有很大不同，而且本书通过对发展中国家电信供给与需求分析发现，即使有效需求不足也是可以在发展中国家的电

信制度约束中找到答案的。

第五，通过对两种路径选择的比较分析，得出了发展中国家并不适宜在相对封闭的条件下进行拆分式电信改革，而开放互动式改革路径是不以人们主观意愿为转移的客观必然。这一结论对于发展中国家以至世界电信的改革与发展的进一步路径方向，都有一定的理论和现实意义。

第六，针对中国电信，本书提出技术开放与制度开放的失衡，是造成一方面中国电信的基础网络超前建设，另一方面中国电信的制度建设严重滞后的根本原因的观点，并对 WTO 后中国电信业进行了政策研讨，对解释和解决中国电信的改革与开放问题有一定的借鉴作用。

**主题词：发展中国家电信 竞争优势路径 制度供给
开放互动**

Abstract

With the advent of the 80s of the 20th century, information technology develops with each passing day, information technology begins to exert more and more significant impact on the world economy. As one of the backbones of information economy, the development of telecommunications industry has become a focus drawing universal attention. The telecommunications reform throughout the world, provides an unprecedented development environment, almost all the developing nations have put telecommunications industry in a priority position. How to enhance the competitiveness of telecommunications industry has become an important task for further development of developing nations. The thesis will mainly deal with the choice of ways of developing advantages in telecommunications industry competition in developing nations, trying to offer a valuable outline for the development of that telecommunications industry.

The analysis of the thesis mainly includes three topics:

First one, the choice of ways of developing the advantages of telecommunications industry competition should depend on two factors, that is, the rules and regulations of telecommunications industry, and situation of supply and creative energy of developing nations.

Second one, the degree of openness and interactivity of advanced telecommunications system, is in close relation to the development of telecommunications industry of developing nations, and it is the only way of achieving competitive advantages for developing nations. Meanwhile, system innovation in some parts of the industry will have an active effect on

the change of entire system.

Third one, the forementioned two aspects are obviously represented in the telecommunications reform in China, and will play a guiding role in further reform.

To be more specific, the thesis will be divided into five chapters. Chapter one, constructing the hypothesis of “Supplying Cycle Under Inefficiency System” of telecommunications of developing nations, in order to lay a theoretical foundation for adalysing how to choose the way of developing telecommunications; Chapter two, analysing economic and technological features and developing experience in the global market of telecommunications industry, in order to provide veritable evidence for the whole thesis; Chapter three, making an indepeth analysis of current situation of telecommunications, especeially the balance between supply and demand of telecommunications in developing nations, in order to provide a pratical ground for the choice of advantageous way of telecommunications competition in developing nations; Chapter four, by comparing internal breaking up with openness and interactivity, two methods of reform, the thesis puts forward the core argument, that is, open and interactive reform is the advantageous way of developing telecommunications of developing nations; Chapter five, is about the reflection on some theories and policies for the telecommunications development in China, and also raises some views on the construction of competitive advantages of telecommunications industry affter China's entry into WTO.

This will have the following features:

1. The thesis provides a new angle of view for the research of telecommunications of developing nations. In the past, academic arena not only did insufficient research on the telecommunications industry of developing nations, but mainly dealt with the law of telecommunications itself, just lingering on the aspect of summarising and generalizing the

past situation. The thesis will start with how to choose the way of competitive advantages for telecommunications of developing nations, take how to find a advantageous road of development in the global telecommunications competition for the telecommunications industry (or similar industries) in developing nations as the focus of analysis, and expound the significance of constructing competitive advantages of developing nations brought by the nowadays situation of telecommunications and change in the open and interactive system, by analysing network economy and the basic features and conditions of developing nations. This is a new try in the academic arena. In addition, it organically combines the analysis of different nations with the analysis of different industries, which provides us a broader analysis of some problems of domestic telecommunications, and enables us to grasp the characteristics in nature and fundamental meaning of developing nations from an industry angle of view.

2. The analysis of the whole thesis establishes under the framework of theoretical presumption, helping the whole thesis form a relatively well knit logical system. First of all, the thesis puts telecommunications into the productive power background of network economy, analysing it is the factors connected with the system that determine the proportion of one competitive force to another. And then, it puts forward the theoretical framework of "Supplying Cycle Under Inefficiency System" hypothesis by analysing telecommunications industry system of developing nations. Next, it makes verity examinations on the features of telecommunications industry itself and the development of telecommunications in developed and developing nations, accordingly infers the core argument that open and interactive reform is the only way for developing nations to achieve competitive, advantages. Thus, the whole thesis forms a well knit logical system, from theoretical framework to verity examinations, from verity effects to policy expansion.

3. The thesis places emphasis on verity analysis, and makes use of various analytical methods flexibly. It is facing a question with strong sense of practicality. On one hand, it pays much attention to employing purely theoretical methods of analysis, such as theoretical verity, analysis of inactivity and activity, logical analysis and comparing analysis; on the other hand, it also emphasizes the analytical methods connected with practicality, such as the analysis making use of experience and strategy. And then, according to the demand of objectives and contents, it organically integrates various analytical methods together, so as to avoid subjective inference and the empty hypothesis of theories, trying to make the analysis and conclusion of the whole thesis be theoretically tight and practically credible.

4. Under the theoretical framework of this thesis, it analyses that China telecommunications reform touches off great controversy, which is conducive to breaking through the deeply embedded insular ideas about the open and interactive telecommunication reform.

The thesis will mainly deal with the argument of how to choose an advantageous way for the telecommunications industry of developing nations, and also attempt to put forward some new ideas.

Firstly, through analyzing system environment and arrangement of developing nations' telecommunications industry, the thesis puts forward the hypothesis of "Supplying Cycle Under Inefficiency System", making use of the theories about system changing of systematical economy. Furthermore, the thesis raises the points that to be open to and interactive with advanced telecommunications system is the only way to break the old inefficient cycle of telecommunications of developing nations. In analyzing how to enhance the competitiveness of developing nations' telecommunications, the old system is no longer determined by the external conditions. In addition, the thesis particularly stresses the significant role

system innovation plays in the development of telecommunications industry. For this point, it is distinctively different from the analytical thinking and conclusions of developing nations' telecommunications industry at present. At the same time, in analyzing telecommunications from a macroangle of view, the thesis consistently not only emphasizes that it is the change and innovation of technology that injects driving force into the development of global telecommunications, but also points out that it will become impossible for rapid development of telecommunications industry in lacking of innovation in the global economic eyetem. On the other hand, in the thesis, the argument about the influence of global entire system environment on system arrangement of each nation, together with the argument highlighting the interactive relation between parent system and subsidiary system, provides further support for the significance of the whole telecommunications industry, an industry facing open system change.

Secondly, traditional analysis of network economy stresses the role technology plays. The thesis boldly puts forward that it is the feature of network economy that determines the supply and power of innovation of system fundamentally under the competitive rule of network economy, and also points out that network economy is the competition of difficult-to-exchange resources, but the resources, which are most difficult to gain, are those resources need longer time to form a system basis of such a analysis not only provides the premises of nucleus part of theory and further policy suggestions, but also provides the evidence for developing nations' traditional thinking of taking the choice of open and interactive telecommunications reform as a breakthrough of system innovation, but not stubbornly depends on technological innovation.

Thirdly, in the analysis of the feartures of telecommunications industry, the thesis sets a question that the situation of world telecommuni-

cations industry system is not only determined by technological conditions, but also pushed on by technological progress, and also pays attention to the effect on telecommunications industry caused by situation and features of the entire global economic system. State-owned and monopolistic system arrangement is not only determined by natural monopoly and economic features of telecommunications industry, but also in connection with the choice of system of cosmopolitan state monopoly. Similarly, the liberation wave of telecommunications is not only the result of rapid technological development, but also determined by the marketization and liberation of changing trend of globalizing entire world system after the Cold War.

Fourthly, the thesis puts forward an idea that insufficiency of system supply and innovation, such an idea is distinctively different from the idea that the common demand cannot sufficiently check the development of telecommunications. In addition, by analyzing supply and demand of telecommunications of developing nations, the thesis discovers that even though effective demand is insufficient, it can also find proper answer under the restriction of developing nations' telecommunications system.

Fifthly, by analyzing the comparion of two ways chosen, the thesis draws a conclusion that it is not suitable for developing nations to conduct breaking up telecommunications reform under relatively confined conditions. However, the way of open and interactive reform is a kind of objective inevitability, and will not shift as the result of subjective will. This conclusion has both theoretical and practical significance on the further way and direction of developing nations even the world telecommunications reform and development.

Sixthly, as for China telecommunications, the thesis points out the overbalance between technological openness and system openness, which is, on one hand, conductive to beyond construction of China telecom-

munications' basic network; on the other hand, is the fundamental reason of serious stagnancy in the system construction of China telecommunications. The thesis also makes research and discussion on China's entry into WTO, and it can be used as reference for interpreting and solving problems on reform and openness of China telecommunications.

Key word: telecommunications of developing nations, advantageous way of competition, system supply, openness and interactivity