



Delivery of Advanced Network Technology to Europe Ltd

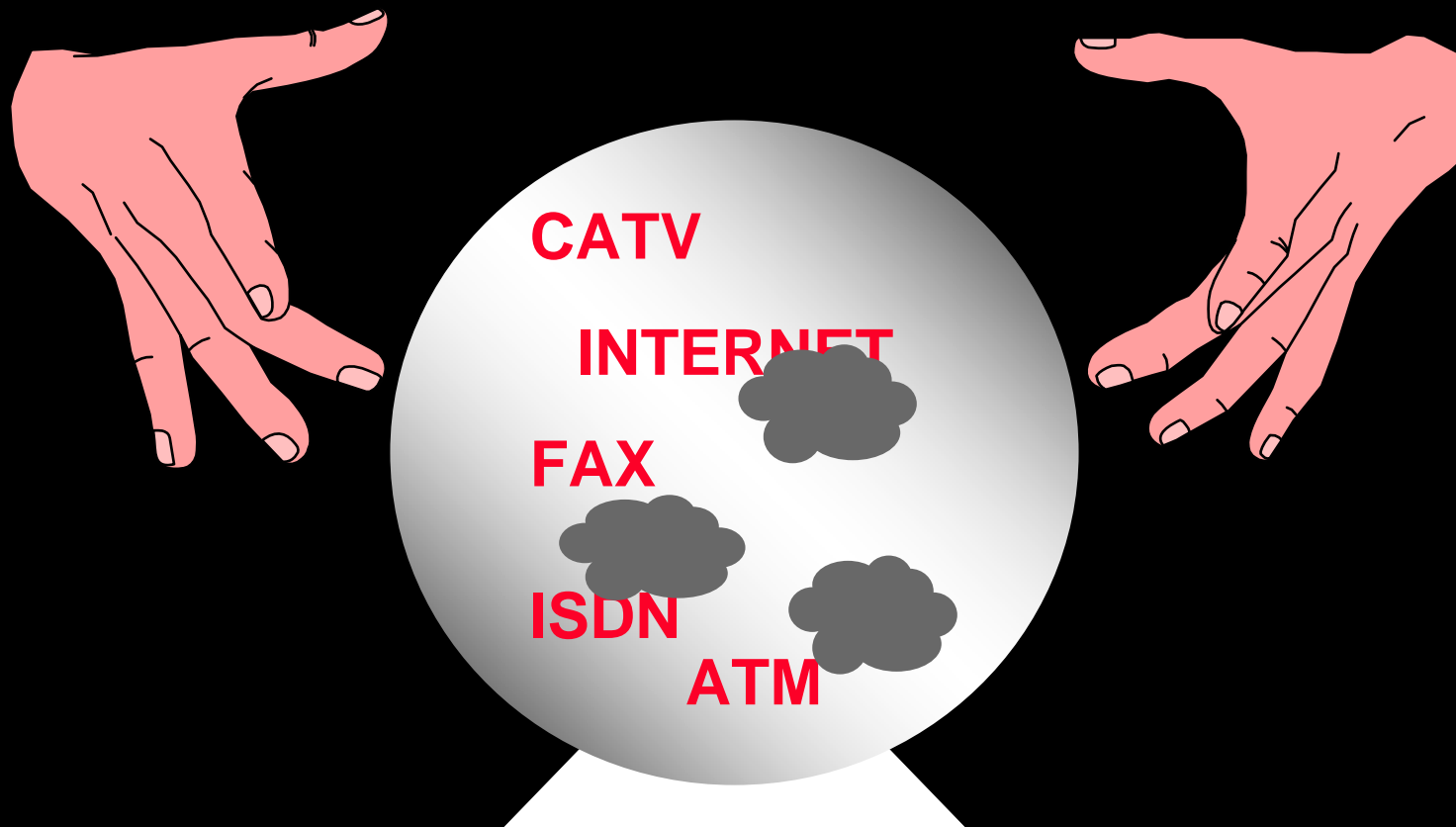
The future of the communications business in the 21st century

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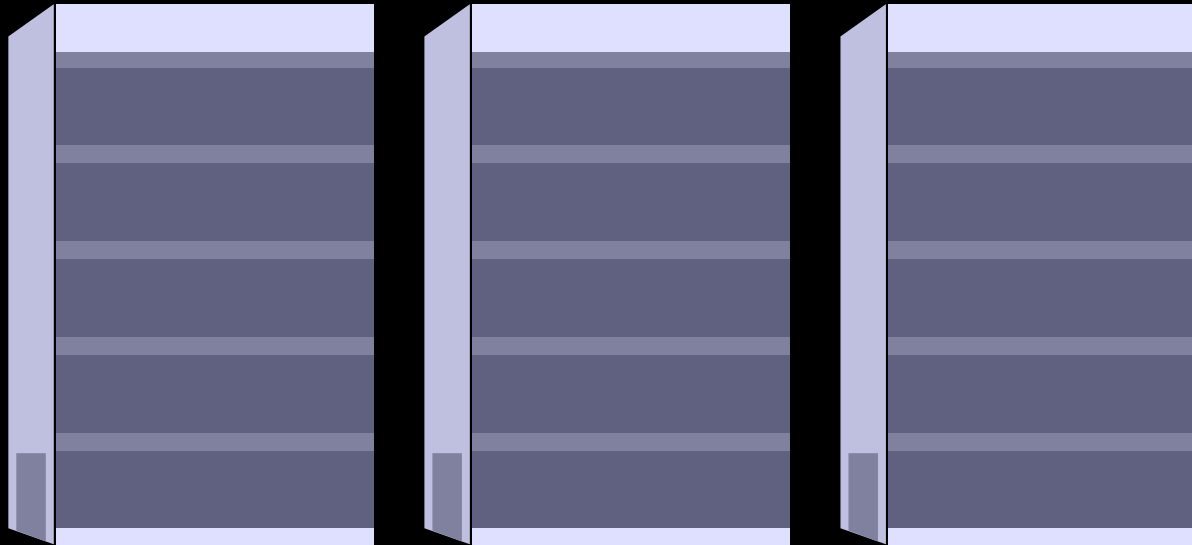
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Predicting the future





1984 Implementation of system x



15,000
LINE
LOCAL
SWITCH

RACKS: 15
PCBs: 2,800

1996 Implementation of system x



15,000
LINE
LOCAL
SWITCH
CURRENT DESIGN

PCBs: 2



Trends in optical technology

BIT RATE

DATE

140 Mbps

1984

560 Mbps

1986/87

1.2 Gbps

1989/90

2.4 Gbps

1990/91

Up to 12x1.2 or 12x2.4 Gbps

1994



What makes a winner

- User demand
- Existing infrastructure
- Technology less important

Internet

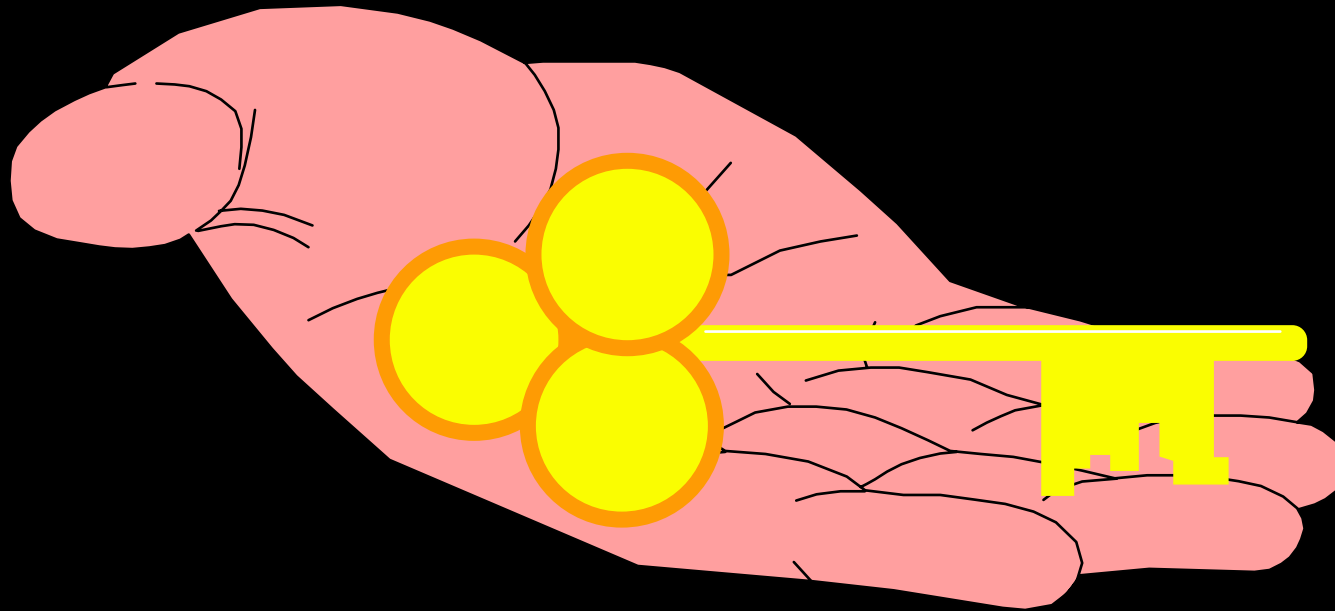
- Innovative products
- Quality of Service problems
- Who is actually paying?



The market in the next millenium

- New entrants
 - CATV
 - Fibre providers
 - Global operators
- No one supplier will dominate
- Access to other people's customers is vital

The regulator holds the key



US deregulation

- Computer Inquiry Three
- “Modified Final Judgement”
- Judge Green

1998 European deregulation

- Utopia joins E.U.
- A level playing field?
- Fair play?
- What is the game?
- Who is the referee?

Regulation - the prescription

- Creates competition
- Needs to be pragmatic
- Needs a legal framework
- Needs a commercial framework

Où est Maître Vert?

Où est Prof Carsberg

Couch potatoes Rule OK!

