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The Effects of Deregulation on the Japanese Public Switching Industry

The central question that drives this report is how manufacturers of telecommunications equipment--specifically, central office (CO) switching--formulate competitive strategy for the Japanese market when their customer base and in effect the entire industry faces wrenching changes caused by technological innovation, deregulation, and globalization?

To answer it, I analyzed the public switching industry first globally and then focused on Japan, specifically. With this base firmly in place, I applied theories on strategy research and competitive structure to the realities of the Japanese telecommunications industry. In particular, I used Michael Porter's theory of industry scenarios to explore the issues centered around the potential divestiture of NTT: how divestiture, if it were to occur, would effect the competitive strategies of CO switch manufacturers. Through this study I attempted to identify which strategies could be carried out today by manufacturers to remain or become competitive in the CO switch segment. I assumed that the leading group of companies (NEC and Fujitsu) stood to gain the most and that the third group (Northern Telecom) would also be positioned to make substantial inroads in the Japanese market while the second (Hitachi and Oki) and fourth (other foreign manufacturer) groups would be harder pressed to turn the situation to their advantage.

After testing the assumption, I came to the conclusion that the first group would retain their leadership status if they took a conservative approach to the divestiture issue. The future competitive standing of second and third group was less certain. Divestiture represented a golden opportunity for foreign switch vendors to enter the Japanese market and would put considerable pressure on the co-leaders Hitachi and Oki.

In retrospect, the major difference between the scenario creation method I developed and that of Michael Porter was that while he decided to approach industry scenarios from the perspective of a single company, I expanded the concept to cover an entire industry. I was in general agreement with Porter, however, about the overall purpose and usefulness of industry scenarios. They are an effective method to force the corporate planner to understand the basic forces that shape the future of an industry. They are an excellent way to get management to think creatively and systematically about future uncertainty.