

# Index

- Adjusted gross revenues (AGRs), 181
- Aircel, 169, 173, 176, 177, 180
- AT&T/Time Warner , 128–129
- Austrian Federal Competition Authority (BWB), 12
- Austrian telecoms regulator (RTR), 12
- Average revenue per user (ARPU), 125
  
- Bharti Airtel, 163, 165, 169–170, 172, 179
- Body of European Regulators for Electronic Communications (BEREC), 14
- Bouygues Telecom, 65, 145–147
- BSNL, 163, 165, 177, 180
- BT/EE, 124–125
- Business model innovation, 4–5
- Buyer switching costs, 48
  
- Cablevision, 127
- Carrier Aggregation, 66
- 21st Century Fox, 132–133
- Chief executive officer (CEO), 122
- Christiansen interpretation, 1–3
  - critiques of, 3–5
  - telecommunications-based critique, 5–6
- CK Hutchison, 27, 40
  - financial performance, 200–205
  - 3G, 189
  - geographical footprint, 195–199
  - initial public offering (IPO), 197
  - mobile subscribers, 200
  - in telecommunications industry, 190–195
- Code-division multiple access (CDMA), 59
- Competition and Markets Authority (CMA), 124
- Concentration ratios, 92
- ‘Connect’ test, 13
- Council for Economic Defense (CADE), 128
- Customer acquisition, 10
  
- Department of Justice (DOJ), 129
- Department of Telecommunications (DoT), 165
- Deutsche Telekom, 131
- Dhan Dhana Dhan plans, 170
- Difference-in-differences (DiD) methodology, 12
- Dish Network, 134
- Disruption
  - case studies of, 21–45
  - caused by new entry, 47–89
  - clarifications, 2–3
  - contrasted cases of, 215–217
  - internal and external factors, 213–215
  - ‘low-end,’ 1
  - multifaceted nature of, 213–215
  - ‘new-market,’ 1
  - Ofcom analysis of, 7–10, 21–22
  - patterns of, 7, 220
  - in practice, 218
  - theory of, 1
  - and trend towards multi-play, 121–139
- Disruptive activity by
  - Aircel, 169
  - BASE, 25
  - Bharti Airtel, 163, 217
  - BSNL, 163
  - CK Hutchison, 27
  - Digicel, 109
  - Fastweb, 109
  - Free Mobile, 216

- Hutchison and VimpelCom,  
     108–109  
 Idea Cellular, 163, 174, 177, 178,  
     180, 216  
 Iliad, 109, 216, 217  
 KPN, 25  
 LTE network, 16  
 mobile network operator (MNO),  
     10  
 mobile virtual network operators  
     (MVNOs), 6  
 Mobistar, 25  
 MTNL, 164  
 NJJ Capital, 34–35  
 Proximus, 25  
 Quadrant Televentures, 164  
 radio access network (RAN), 11  
 RCom, 163  
 Reliance Jio, 35, 216  
 Sistema Shyam, 164  
 Tata DoCoMo, 164  
 Tele2, 22  
 Telecoms Disputes Settlement &  
     Appellate Tribunal  
     (TDSAT), 169  
 Telenor, 11, 164  
 Telia One, 26  
 TeliaSonera, 11  
 T-Mobile/Orange merger, 12  
 T-Mobile/tele.ring merger, 12  
 T-Mobile US, 38–39  
 United Internet/Drillisch, 27  
 Vodafone, 25, 216–217  
 Disruptive activity in  
     Australia, 35–36  
     Austria, 12, 25, 98–99  
     Belgium, 25  
     Canada, 36  
     China, 15  
     Czech Republic, 25  
     Denmark, 11, 26, 104–105  
     European Union (EU), 91–119  
     Finland, 13, 26–27  
     France, 27, 102–104  
     Germany, 11, 27–28, 100–102, 121  
     Greece, 28  
     Hong Kong, 36  
     India, 163–187  
     Indonesia, 36–37  
     Ireland, 11, 28–29, 100  
     Italy, 29–30, 108–110  
     Japan, 37  
     Malaysia, 37  
     Netherlands, 12, 30–31, 110–111  
     New Zealand, 37–38  
     Norway, 13, 31, 99  
     Poland, 31–32  
     Portugal, 32  
     Scandinavian countries, 13  
     South Africa, 38  
     Spain, 33  
     Sweden, 33–34  
     Switzerland, 34–35  
     UK, 34, 105–108, 124–125  
     USA, 38–40  
 ‘Disruptive Growth Fund,’ 4  
 Disruptive innovation, 5  
 Disruptive firms, 8, 10, 21  
 Disruptors, 112–113  
  
 Earnings/loss before interest and  
     taxation (EBIT/LBIT),  
     200  
 EBITDA, 203  
 European Commission (EC), 10, 31,  
     63, 91  
 European Economic Free Trade Area,  
     50  
 European mobile  
     in 2017, 93–97  
     concentration ratios, 92  
     Denmark, 104–105  
     disruptors, 112–113  
     France, 102–104  
     Germany, 100–102  
     International Telecommunication  
     Union (ITU), 92  
     Ireland, 100

- Italy, 108–110
- Long-Term Evolution (LTE)
  - licences, 93
- mergers, 97–98
- mobile market, 93–96
- mobile virtual network operator (MVNO), 98
- NetCom GSM, 99
- Netherlands, 110–111
- new entry, 111–112
- Norway, 99
- one-off exception, 97
- quad-play, 113–114
- sample, 91
- takeovers, 97–98
- Telia Norway, 99
- T-Mobile, 103
- UK, 105–108
- Ziggo, 110
- European mobile communication markets, 47
- European Union (EU), 10, 50, 91, 114
- Federal Communications Commission (FCC), 38
- Freebox, 147
- Free Mobile, 65
  - Altice, 154–155
  - Bouygues Telecom, 155–157
  - Freebox, 147, 148
  - 2G, 143
  - 3G and 4G (LTE) licences, 144–147
  - 3G services, 149–150
  - GSM standard, 143
  - Iliad, 147–149, 152
  - Internet protocol TV (IPTV), 147
  - Orange, 154
  - outcomes, 150–152
  - pink Minitel services, 147
  - SFR, 154–155
  - stable three operator market, 143–144
  - Time-Division Long Term Evolution (TD-LTE) licences, 146
  - Timeline of Events, 1989–2018, 142
  - Video-on-Demand (VoD), 148
  - Voice over IP (VoIP), 148
- French telecommunications market.
  - See* Free Mobile
- General financial information, 10
- Gigabyte (GB), 38, 168
- Gigahertz (GHz), 16, 64, 130
- 2G (GSM) licensing, 49–50
- 3G (UMTS) licensing, 50–65
  - new entrants, 51, 60–62
- 4G (LTE) licensing, 66–86
- Global System for Mobile (GSM), 163
- GSM standard, 143
- Harvard Business Review (HBR)*, 3
- Hong Kong Broadband Network (HKBN), 126
- Hutchison, 6, 13, 40, 59, 112
- Hutchison Asia Telecommunications (HAT), 194
- Hutchison 3G Italy Investments, 64, 108
- Hutchison H3G, 63
- Hutchison Telecommunications International Ltd (HTIL), 193–194, 198, 199
- Hutchison Whampoa, 8, 59, 63, 87, 111
- Idea Cellular, 163, 166, 168, 171, 178
- Iliad, 147–149, 152
- Incumbents customers, 2
- Indian mobile market
  - adjusted gross revenues (AGRs), 181
  - 2016 auction, 164–168
  - mobile network operators, 163–164
  - restructuring, 171–173

- Securities and Exchange Board (SEB), 169
- telecom regulatory framework, 165
- Telecoms Disputes Settlement & Appellate Tribunal (TDSAT), 169
- Initial public offer (IPO), 131
- Interconnection usage charge (IUC), 175
- International Telecommunication Union (ITU), 25, 26, 34, 92
- Internet of Things, 6
- Internet protocol (IP), 122
- Internet protocol TV (IPTV), 147
- Internet service provider (ISP), 38
  
- Jio Prime Membership Programme, 170
  
- Kodak, 4, 7
  
- Long-Term Evolution (LTE), 16, 93, 216
- 'Low-end' disruption, 1
- LTE-Advanced (LTE-A), 66
  
- Machine-to-machine (M2M), 6, 28
- Margrethe Vestager, 11
- Megabits per second (Mbps), 16, 66
- Megahertz (MHz), 16, 30, 38, 42, 88
- Merger and acquisition (M&A) activity, 16, 230
- Mergers, 97–98
- Millimetre wave (mmWave), 130
- Mobile market, 93–96
- Mobile messaging service (MMS), 26
- Mobile network operator (MNO), 10
- Mobile operator licensing, in Europe
  - first-mover advantages, 48–49
  - 3G licensing, 50–65
  - 4G licensing, 66–86
  - GSM licensing, 49–50
- Mobile virtual network operators (MVNOs), 6, 98, 101
  
- MTNL, 164, 171, 180–181
- Multifaceted nature, of disruption
  - contrasted cases of, 215–217
  - internal and external factors, 213–215
- Multi-play
  - Asia, 125–126
  - BT/EE, 124–125
  - Cablevision, 127
  - definition, 121
  - Deutsche Telekom, 131
  - Hong Kong Broadband Network (HKBN), 126
  - initial public offer (IPO), 131
  - Netflix, 134
  - over-the-top (OTT) services, 134
  - pay-off, 134–135
  - quad-play, 121
  - recent activity, 133
  - Sky, 132–133
  - Spectrum Mobile, 133
  - 21st Century Fox, 132–133
  - Time Warner Cable (TWC), 126
  - T-Mobile, 121
  - USA, 126–128
  - Verizon Communications, 127, 130, 131
  - Vodafone, 122–124
  - Yahoo!, 130
  
- National Company Law Appellate Tribunal (NCLAT), 179
- National Company Law Tribunal (NCLT), 169, 177
- NetCom GSM, 99
- Netflix, 39, 134
- Network coverage and quality, 16–17
- New entry, 111–112
- 'New-market' disruption, 1
- Next generation network (NGN), 123
  
- Ofcom analysis, 21–22
  - aggressive behaviour, 10
  - core hypothesis, 7–8

- disruptive firms, 8
- effects on investment, 8–9
- European countries cited, 22–34
- European countries not analysed, 34–35
- motivation, for disruption, 9
- summarised, 9–10
- One-off exception, 97
- Orange, 154
- Outcome-based approach, 6–7
- Over-the-top (OTT) services, 134
  
- Pink Minitel services, 147
  
- Quad-play, 113–114, 121
- Quadrant Televentures, 164
- Quality of service (QoS), 2, 16
  
- Radio area network (RAN), 11, 109
- RCom, 163
- Reliance Jio, 35, 131, 164, 168, 170
  
- Salop model, 16
- Securities and Exchange Board (SEB), 169, 172
- Significant disruptors
  - CK Hutchison, 40
  - ice, 41–42
  - PPF Group, 40–41
  - Tele2, 40
- SIM card, 149–150
- Significant market power (SMP), 177
- Sistema Shyam, 164
- Sky, 132–133
- Smart Telecom, 59
- Spectrum Mobile, 133
- Stable three operator market, 143–144
- Strategic debt restructuring (SDR), 174
  
- Takeovers, 97–98
- Tata DoCoMo, 164
- Telecom Italia, 63
- Telecommunications-based critique, 5–6
- Telecom Regulatory Authority of India (TRAI), 165, 168, 170
- Telecoms Disputes Settlement & Appellate Tribunal (TDSAT), 165, 169, 177
- Telenor, 11, 26, 105, 164
- Telia Norway, 99
- Time dimension duplex (TDD), 110
- Time-Division Long Term Evolution (TD-LTE) licences, 146
- Timeline of Events, 1989–2018, 142
- Time Warner Cable (TWC), 126
- T-Mobile, 98, 121, 133
- Triple-play, 124
  
- Uber, 3, 5
- Universal mobile telecommunications system (UMTS), 47, 67–77, 144
  
- Verizon Communications, 127, 131
- Video-on-Demand (VoD), 148
- VimpelCom, 63, 64, 108, 109
- Virgin Mobile, 145
- ‘Virtual’ operators, 6
- Vodafone, 63, 121–124, 163
- Vodafone Hutchison Australia (VHA), 198
- Voice over Internet Protocol (VoIP), 35
- Voice over IP (VoIP), 148
  
- Western PCS Corp., 199
- Western Wireless Inc., 199
- WiMAX to LTE, 36
- Wireless fidelity (Wi-Fi), 125, 127
- Wireless industry, 15
- Worldwide interoperability for microwave access (WiMAX), 36
  
- Yahoo!, 127, 130
- Zapp Mobile, 59