

DSL 訂價之探討：由產品特性觀點及政策觀點

中文摘要

DSL 是寬頻上網的方式之一。以技術而言，不論是在寬頻滲透率、寬頻總使用人口數、寬頻成長率，DSL 領先其他替代性科技。但是，DSL 的研究除了顧問公司定期收集各國產品及分析市場規模外，很少有研究對不同國家的 DSL 進行比較，並且找出差異性，其原因在於資料過於分散，且要對各國的市場有深入觀察。本研究即嘗試克服上述困難，以橫斷面研究為起始點，並收集美國、英國、台灣三國資料，由兩種角度分析 DSL 的訂價：首先是透過產品特色觀點，也就是快樂訂價法，將 DSL 價格，拆解成基本元件再組合，以找出影響價格的主要特色，並比較三國主要特色異同。第二個觀點起源於 DSL 販售價格常有價格長期不變，但內容大幅度變動的情況；而且隨著 IPTV、衛星電視、VoIP 的技術成熟，ISP 的獲利來源，逐漸朝增值服務轉移，但這種現象並未同時出現於 DSL 普及率高的國家。有部份原因是各國的區域迴路政策，區域迴路開放程度落後的國家，其 DSL 銷售內容以基礎特色為賣點；區域迴路開放度高的國家，其 DSL 販售內容除了基礎特色外，增值服務（搭售）也成為 DSL 銷售內容的主力。

此外，本研究結果也顯示區域迴路販售所導致的增值服務差異化，其時間優勢無法持續太久，因為擁有線路所有權的電信業者會在有限時間內，迎頭趕上。但是區域迴路開放有助於 DSL 增值服務的引進與多元化已在本研究取得支持性證據。

關鍵字：DSL、寬頻、快樂訂價法、搭售

DSL Services Pricing – from the Perspective of Hedonic Pricing and the Policy of Local Loop Unbundling

Abstract

DSL is one of primary broadband technologies to household users, and it is also in significant in terms of global broadband penetration rate, the number of subscribers, and the growth rate. Except for commercial institutes' research periodically collecting data and analyzing the trend of market, there are few studies comparing cross-country DSL services since data are scattered on numerous ISPs' web pages, and a comparison standard is not easy to establish. This study attempts to settle the problem of cross-country comparison. Initially, based on three representative countries' data, DSL service price is disassembled into fundamental service characteristics in terms of hedonic pricing, and the primary service characteristics for specific country are located. But the primary characteristics have not been unchanged for years, even DSL service price remains stable, and with emergence of new broadband applications, such as IPTV, satellite TV, and voice over IP, ISPs' profit profile has shifted from fundamental service characteristics, like speed and the number of IP address, to value-added service. However, this change on ISPs' profit profile does not apply to each country with high DSL penetration rate. Our finding reveals that policy determines the focus of DSL service marketing. For those countries that ignore local loop unbundling policy, their DSL service marketing simply centers on fundamental characteristics; for those countries that emphasize local loop unbundling policy, their DSL service marketing focus on both fundamental characteristics and value-added services.

This study also indicates that the advantage of first mover for ISPs without wires benefited from local loop unbundling policy will not remain since incumbent telecoms also operate ISPs will soon catch up in a period from six months to one year. However, this study has demonstrated that local loop unbundling policy could facilitate the introduction and diversification of value-added service on DSL offering.

Key words: DSL, broadband, hedonic pricing, bundling