

The pre-May Statement status of each of these markets is dealt with in the following sub-sections.

#### 1.4.1 Public Switching and Transmission

The three national carriers have used public tender processes to select and purchase materials for the construction and operation of their telecommunications facilities. Of the carriers, Telecom is by far the major market.

While public tenders have been open to any company, whether Australian or foreign-owned, great policy emphasis has been placed on local content in the tender selection process, to the extent of forcing new entrants to establish local manufacturing facilities. As a result, the bulk of equipment and materials purchased by Telecom has had a high proportion of local content. Telecom's major suppliers, all with local production capabilities, have included:

- \* Austral Standard Cables; \* Olex Cables; \* L M Ericsson;
- \* NEC Australia; \* Alcatel STC; \* GEC; \* Plessey;
- \* Siemens; \* Philips; and \* AWA.

#### 1.4.2 Private Transmission Equipment

The private transmission market (principally microwave equipment) has consisted of the following major segments:

- \* railways and public utilities (electricity supply and gas pipe-lines) for provision of operational communications;
- \* television broadcasters (national and commercial) for provision of program links;
- \* major business corporations (banks, oil industry etc.) for data communications and for transmission links to satellite earth stations;
- \* operators of mobile communications for fixed links to transmitter sites.

#### 1.4.3 Customer Terminal and Switching Equipment

A large part of the customer terminal and switching equipment market has been open to competitive supply direct to users, for some time. Nearly all types of equipment which have been open to competitive supply, have also been offered by Telecom.