

# Understanding The Disruptive Potential Of A New Virtual & Open Network

November 13, 2020 by

Perhaps the most controversial topic surrounding US Wireless is the potential for Dish to deploy a brand new 5G network, with disruptive potential driven by much lower unit costs than the incumbents. Investors have been broadly skeptical that Dish will succeed in building a disruptive network, and they are equally skeptical that it will be a good business, even if it does get built.

**Stephen Bye**, the Chief Commercial Officer for **Dish's** Wireless business, will be at our [5G Conference](#) on **Tuesday November 17th** to explain why Dish will succeed and why a wholesale wireless network, built on virtual and open standards, with a very low cost per GB, is a very good business (see our own thoughts [here](#)). Stephen will be presenting on the main stage at **2:40 PM EST** on Tuesday.

**Rakuten** was the global pioneer when it comes to building a greenfield, virtual and open network to go up against entrenched incumbents in a developed market. They have often been characterized as a canary in the coalmine for Dish's endeavors. Tareq Amin, Rakuten's CTO, will be at the conference to discuss the challenges they have faced and the opportunities they see with their network deployment in Japan and the opportunities for the network architecture they have pioneered in other markets. Tareq will be presenting at **8:00 AM EST** on Tuesday.

Rakuten's virtualized network integrates 4G/5G mmWave 5G small cells supplied by **Airspan**, runs 100% on **Intel** compute and **Red Hat's** (an **IBM** company) cloud software stack. Chris Wright, Red Hat's CTO, will be presenting **8:40 AM EST** on Tuesday. Dan Rodriguez, the GM of Intel's Network Platform group will be presenting at **9:10 AM EST**, followed by Abel Mayal, SVP Tech & Marketing at Airspan at **9:50 AM EST**.

**AltioStar** is one of the main enablers of both Rakuten and Dish's virtual, open networks. Thierry Mauplie, AltioStar's chief of strategy, will be presenting at **10:20 AM EST**. Dish also just announced that they will be working with **Qualcomm** on the wireless network deployment. Alejandro Holcman, Qualcomm's SVP of Corporate Engineering, will be presenting at **12:00 PM EST** on Tuesday.

Our hope is that by the end of the day investors will have a much better understanding of the technology and platforms underpinning Dish's ambitions as well as a better understanding of the business model. This should in turn shed light on Dish's disruptive potential and the impact it might have on Verizon, AT&T and T-Mobile as well as on the myriad companies that might leverage Dish's network to deliver new products and services to consumers and businesses.

To register for the conference and for 1x1s with these speakers, please click [here](#).

For a list of speakers, please click [here](#).

For an agenda, please click [here](#).

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**Full 12-month historical recommendation changes are available on request**

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