

# Internship Report

**Tel**  **Talk**

আমাদের ফোন

# **Comparative Analysis of Teletalk Bangladesh Limited**

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## Letter of Transmittal

30<sup>th</sup> May, 2013

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**Subject: Submission of internship report for completion of course.**

This is to inform you that I have completed the internship report. This report focuses on the contribution of Teletalk in Bangladeshi telecom business. The report, titled “**Comparative Analysis of Teletalk Bangladesh Limited**” has been prepared for the completion of the course, Internship (BUS 400).

In making of this report, I have followed all your specific instructions involving report writing so as to present my views and in the easiest manner. However, I will be glad to clarify any discrepancy that may arise.

Thank you for your co-operation.

Sincerely Yours,

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## Acknowledgement

I would like to thank those people who have really helped me, encouraged me and show me the way how to work properly regarding my official task in Teletalk Bangladesh Limited and my project work.

At first I want to thank to my academic supervisor **Mr. Husain Salilul Akareem**, BRAC Business School, BRAC University who helped me to choose my internship topics “Comparative Analysis of Teletalk bangladesh Limited” as well as provided me the guideline regarding the preparation the internship report and presentation.

Than I would like to thank to my on-site supervisor **Mr. Atikul alam**, Assistant Manager, Sales & Distribution Department, Marketing Division of Teletalk Bangladesh Limited who helped me in providing suggestion, guideline and information regarding my internship topic “Comparative Analysis of Teletalk bangladesh Limited”

Moreover I also want to thank **Mr. Md. Habibur Rahaman**, GM, Marketing & Sales of Teletalk Bangladesh Limited who give me the opportunity to work in the S&D department.

I would like to give thanks to all the employees of S&D department in Teletalk for their active cooperation and willingness to help me at all times. Without them, I do not think the experience would have been as great as it had been.

Finally I would like to thank my friends and family member who have given me mental and internship information related support to pursue the whole internship properly.

## Executive Summary

Teletalk Bangladesh Limited is one of the key players in telecommunication industry & only 3G network service provider of Bangladesh. Teletalk started its business in 26 December, 2004. The total share of Teletalk has owned by the “Government of the Peoples Republic of Bangladesh”

I was employed in Sales & Distribution unit under Marketing Division. The task of my team is to deal with the distributors & retailers involved with Teletalk for sales and distribution purpose. I learn so many things during the internship period at Teletalk. I have gained the field level experience of sales & distribution team. I have learned the strategy of 3G marketing in Bangladesh as this technology is new in Bangladesh.

Operators	Active Subscribers (in million)
<b>Grameenphone</b>	41.792
<b>Banglalink</b>	25.921
<b>Robi</b>	21.403
<b>Teletalk</b>	1.831
<b>Airtel</b>	7.472
<b>Citycell</b>	1.451
<b>Total</b>	99.871

Mobile Phone subscriber at the end of March, 2013 (In Million)

Teletalk is the only operator who is offering 3G technology in Bangladesh. So, this is the main strong point of them. Though they 3G service is only available in Dhaka, Chittagong, Gazipur & Narayanganj district, but network expansion is going on. Besides 3G they have a strong 2G network in Bangladesh. They have covered network in 64 districts, more than 400 upazilas. So, they have covered almost whole area of Bangladesh.

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## Comparative Analysis of Teletalk Bangladesh Limited

## 1. Introduction

## 1.1 Rationale for Internship

As a Bachelor in Business Administration (BBA) student, it is required for everyone to remain attached with an organization for a time-period of 12 weeks after completing all the taught courses to relate their academic curriculum to practical working atmosphere which is called internship. An internship program is generally designed for students to grow professionally, experience the real corporate working environment as well as scope & complexity. Moreover, it is a pathway for students to practice professionalism before entering into a serious job. It helps them to build their self-confidence, & interpersonal skills which is important for job market. However, it is also beneficial for both the students & organization to upsurge relationship among them for further opportunities. After successful completion of working with an organization, a report is to be submitted to both on-site supervisor as well as academic supervisor for evaluation.

As a mandatory part of my graduation, I took the opportunity to conduct my internship with one of the flourishing telecommunication organization of our country, Teletalk Bangladesh Limited. I strongly believe that the findings & recommendations of the report will surely help Teletalk to know their position in the market.

With the help of my on-site supervisor **Mr. Atiqul Alam**, Assistant Manager, S&D, Marketing & Sales department, I have performed my internship report on “Comparative Analysis of Teletalk Bangladesh Limited”. My academic supervisor **Mr. Husain Salilul Akareem**, Lecturer, BRAC Business School also approved the topic & allowed me to prepare the report as part of the fulfillment of internship requirement as well as gave me appropriate guidelines time to time.

## 1.2 Background of the Report

Teletalk is the only government owned mobile operators of the country. This is also the only 3G service provider in Bangladesh now. It is also witnessing better growth now. However, growth in the telecommunication industry is showing signs of slowing down. It is important to find out the reasons for the slowdown and how Teletalk managed to regain its better growth rate. Here, I have tried to give an overview of the telecom industry of Bangladesh and analyze the performance of Teletalk compared with the other mobile operators of the country.

## 1.3 Objective

The objective of the project can be divided into two categories. Those are-

### Broad Objective

The broad objective is to know about the contribution of Teletalk Bangladesh Limited in Telecom Industry of Bangladesh.

### Specific Objective

- ☞ To know the overall condition of telecom industry
- ☞ To know the position of Teletalk Bangladesh Limited in Telecom industry regarding market share and profit.
- ☞ To analyze the performance of Teletalk
- ☞ To identify the future prospect of Teletalk in Telecom Industry of Bangladesh after implementing 3G.

## 1.4 Methodology

The procedure of collecting information from various resources is known as methodology. There are two sources from where I had collected my information.

### Primary Sources

The primary sources are-

- ☞ Onsite Task
- ☞ Official (Teletalk) supervisor Interview
- ☞ Employee of other unit
- ☞ Departmental (Business Partner) Raw document

### Secondary Sources

The secondary sources are-

- ☞ Official Website: [www.teletalk.com.bd](http://www.teletalk.com.bd)
- ☞ BTRC website: [www.btrc.gov.bd](http://www.btrc.gov.bd)
- ☞ Other website
- ☞ Different Articles on telecom industry of Bangladesh
- ☞ Management profile of Teletalk

## 1.5 Limitations

The major limitation that I had to face in preparing my report was the confidentiality of information regarding my topic. For an instance I had to face many problems in collecting information regarding the network coverage and sales data of Teletalk Bangladesh Limited. Moreover unavailability of my onsite supervisor was another major problem. I had to wait for a long time to get an appointment of my supervisor because he was under a huge pressure because of his official task. Moreover, one of the major limitations was the official website of Teletalk. Because, the information is not updated regularly on the website. In that case data has been provided from other articles or websites.

## 2. Company Overview

## 2.1 Background of Teletalk

The world is becoming closer day by day with the power of technology, internet & telecommunication. There was a time when people used to wait for weeks to communicate with others. The strength of telecommunication industry has removed this distance from each other all over the world. Now Bangladesh has 6 mobile phone operators. They are Grameenphone (GP), Banglalink, Robi, Airtel, Teletalk & Citycel. Among all the mobile phone operators in Bangladesh, Teletalk is the only domestic and state-owned operator which was incorporated on December 26, 2004 as a public limited company under the Companies Act, 1994 with an authorized capital of Tk.2000 crore. On the 31 march 2005, they have started their operation officially. The mission & vision of Teletalk is given below:

“To innovate and constantly find new ways to enhance our services to our customer’s current needs and desire for the future. Our vision is to know our customers and meet their needs better than anyone else”

Teletalk Bangladesh limited was established with a view to achieving some objectives such as

- ☎ To provide mobile telephone service to the people from the public sector,
- ☎ To ensure fair competition between public and private sectors and thereby to safeguard public Interest,
- ☎ To meet a portion of unmitigated high demand of mobile telephone,
- ☎ To create a new source of revenue for the government. (About Teletalk)

## 2.2: Current Situation



From the starting of Teletalk, it is providing 2G mobile network service in the whole country. Initially, it had started its operation with 634 BTS in 64 districts. Up gradation work is going on as a chronological process. At the end of this quarter their total number of BTS will be 1725 which will cover 448 upazila's, 1.8 million subscribers handling capacity. Besides, Teletalk also build data network for 3 lakhs subscribers. On 14 October, 2012 Teletalk started 3G network service in Dhaka. Then they are gradually expanding it. Till now, Dhaka, Chittagong, Gazipur & Narayanganj is under 3G network coverage. According to Teletalk authority, 3G network expansion work is going on. Initially, they are planning to form 700 BTS for 3G network service. They are planning to spread 3G across the country by 2013. By using Teletalk 3G people can use

- ☎ Faster Internet (Up to 4 mbps speed)
- ☎ Video call facility & Mobile TV Service

## 2.3 : Branding

To develop an emotional link with the patriotism, Teletalk use the tagline as

**“Amader Phone”**





As people know that Teletalk is the only fully govt. owned mobile operator, so Teletalk does emotional branding as like Teletalk is our own phone, so use it.

For 3G they use ,



“Badh Venge Dao” means remove all the barriers & go ahead. The English version of this tagline is “Live Unbound”

## 2.4 Divisions

### **1. Admin**

Administration division works to control the business facility layout, safety & maintenance, controlling overall employee management, security staffs & personnel management etc. Besides, maintaining alternative sites for emergency evacuation is also a part of administrative job. They also do HR work.

### **2. Planning and Implementation**

Planning and Implementation is another important division. They basically do planning for future activity of the company. Besides planning, they also do the drawback about how the plan will be implemented.

### **3. Regulatory and Corporate Relation**

This division is mainly responsible for creating and maintaining corporate relationship. In order to succeed in the present business market you need strong corporate linkage. This division is in charge of all handling legal issues by govt. & so on.

### **4. Marketing and Sales**

Marketing and sales division is responsible for acquiring monthly targeted sales given by top management. The division works to develop brand & market communication, sales of corporate & business products, maintenance of contact centre as well as participate in building up pricing strategy of new products. This division is also in charge of all the CSR activities approval, analysis of event management & sponsorship, maintaining relations with media.

## 5. System Operations

System Operation is one of the most important department in Teletalk, System operation division basically does regular tower operation & maintenance activity. They also supervise core network, radio network and transmission links. For smooth operation Teletalk divide their operation in two zones:

- ☎ Central Zone
- ☎ Chittagong Zone

## 6. Customer Relation Management (CRM)

Customer Relation Management department basically works to maintain active relationship with the existing subscribers & communicate with new subscriber. CRM basically store and analyze the subscriber data which includes usage pattern, type, volume. After analyzing data, they basically help other department by providing subscriber profile.

## 7. Finance and Accounts

Finance and Accounts is the heart of any business functions because they are responsible for budgeting. Finance and Accounting division of Teletalk Bangladesh Limited is accountable for financing into different proposals, business partnering, as well as new product development. Finance controls financial accounting, creating salary sheets for employees, maintaining compliances & so on.

## 8. IT and Billing

IT department is basically maintained and install the official IT utensils. They manage LAN and WAN. They also ensure proper hardware, software and network upgrades installation, re-installation, changes & relocations. They also do troubleshooting for different IT problem.

Billing department works on billing issues of customers. They are basically responsible for the charging and billing from subscribers. (Alam, 2013)

Teletalk offers 2 types of Services

- ☎ Prepaid
- ☎ Postpaid

### Prepaid:

Under prepaid system there are 4 packages. Those are given below:

#### ☎ Projonmo 3G

Tariff plan

Call Directions		Peak [8am-12am]	Off Peak [12am-8am]
		Per Pulse 10 sec	Per Pulse 10 sec
Voice Call	Teletalk to Teletalk	Tk. 0.10/10 sec	Tk. 0.05/10 sec
	Teletalk to Others	Tk. 0.16/10 sec	Tk. 0.16/10 sec
Video Call	Teletalk to Teletalk	Tk. 0.50/10 sec	Tk. 0.20/10 sec
FNF (1 Number)	Voice	Tk. 0.05/10 sec	
	Video	Tk. 0.15/10 sec	
	SMS	Tk. 0.15/sms	
MMS	Tk. 3.00/mms		
SMS	Tk. 0.45/sms		
GPRS	Tk. 0.01 / 5 kb		

#### ☎ Ekush 3G:

Tariff plan

Call Directions		Peak [8am-12am]	Off Peak [12am-8am]
		Per Pulse 10 sec	Per Pulse 10 sec
Voice Call	Teletalk to Teletalk	Tk. 0.20/10 sec	Tk. 0.05/10 sec
	Teletalk to Others	Tk. 0.20/10 sec	Tk. 0.10/10 sec
Video Call	Teletalk to Teletalk	Tk. 0.55/10 sec	Tk. 0.17/10 sec
FNF (9 Numbers)	Voice (Onnet)	Tk. 0.05/10 sec	
	Voice (Offnet)	Tk. 0.10/10 sec	
	Video	Tk. 0.15/10 sec	
SMS	Tk. 0.50/sms		
GPRS	Tk. 0.01 / 4 KB		

## Bijoy 3G:

### Tariff Plan

Call Directions		Peak [8am-12am]	Off Peak [12am-8am]
		Per Pulse 1 sec	Per Pulse 1 sec
Voice Call	Teletalk to Teletalk	2p or Tk 1.20/Min	1.1P or 66p/Min
	Teletalk to Others	2p or Tk 1.20/Min	1.1P or 66p/Min
Video Call	Teletalk to Teletalk	6p or Tk 3.60/Min	1.17p or Tk 1/Min
FNF (4 Numbers)	Voice (Onnet)	.5p or 30p/Min	
	Voice (Offnet)	1p or 60p/Min	
	Video	1.5p or 90p/Min	
SMS	50p/SMS		
GPRS	1p/4KB		

## Shadheen 3G:

### Tariff Plan

Call Directions		Off Peak [8 am-5 pm]	Peak [5 pm-12 am]	Super Off Peak [12 am-8 am]
		Per Pulse 10 sec	Per Pulse 10 sec	Per Pulse 10 sec
Out Going Calls	Teletalk to Teletalk	15.83p/10s	15.83p/10s	4.17p/10s
	Teletalk to Others	15.83p/10s	23.33p/10s	15.83p/10s
	Teletalk to Teletalk	55p/10s	55p/10s	17p/10s
FNF (3 Numbers)	Voice (Onnet)	5p/10s		
	Voice (Offnet)	10p/10s		
	Video	15p/10s		
SMS	50p/SMS			
GPRS	1p/4KB			

(Teletalk Prepaid Tariff Rate )

### Post Paid:

Under Postpaid they have only 2 packages. Those are given below:

## Standard/ Rajanigandha:

### Tariff Plan:

Call Directions	Rates shown as per minute basis   1 Sec Pulse			
	Call Categories	Peak [8am-5pm]	Off Peak [5pm-12am]	Super Off Peak [12am-8am]
Out Going Calls	Teletalk to Teletalk	Tk. 0.80	Tk. 0.80	Tk. 0.25
	Teletalk to Others	Tk. 0.99	Tk. 0.99	Tk. 0.99
	Teletalk to Overseas	ISD	ISD	ISD
SMS	Tk. 0.50 [Nationwide] / Tk. 2.00 [International]			
Voice SMS	Tk. 2.00			
FnF	Tk. 0.05/10 sec[Teletalk] & Tk. 0.13333/10 sec [Other]			

📶 **Shapla:**

**Tariff Plan:**

Call Directions	Rates shown as per minute basis   1 Sec Pulse	
	Call Categories	Any Time
Out Going Calls	Teletalk to Teletalk	Tk. 0.80
	Teletalk to Others	Tk. 1.00
	Teletalk to Overseas	ISD
SMS	Tk. 0.50 [Nationwide] / Tk. 2.00 [International]	
Voice SMS	Tk. 2.00	

(Teletalk Postpaid tariff)

They also offer Teletalk 3G Flash modem for the highest internet experience



Their internet package also divided into 2 types:

- 📶 **Pre-Paid**
- 📶 **Post-Paid**



### Pre-Paid Data Tariff Plan:

SPEED UPTO	DATA VOLUME	SUBSCRIPTION FEE	USAGE VALIDITY	SUBSCRIPTION CODE
256 kbps	40 MB	Tk.25	3 days	D35
	500 MB	Tk.200	30 days	D13
	1 GB	Tk.175	10 days	D14
	2 GB	Tk.400	30 days	D15
	4 GB	Tk.600	30 days	D16
	UNL*	Tk.1050	30 days	D17
512 kbps	40MB	Tk.25	1 day	D18
	1 GB	Tk.200	10 days	D19
	1 GB	Tk.300	30 days	D31
	2 GB	Tk.500	30 days	D20
	3 GB	Tk.1000	6 Months	D36
	5 GB	Tk.750	30 days	D21
	10 GB	Tk.1000	30 days	D22
	UNL**	Tk.1500	30 days	D32
1 mbps	1 GB	Tk.275	10 days	D23
	2 GB	Tk.620	30 days	D24
	4 GB	Tk.800	30 days	D25
	8 GB	Tk.1200	30 days	D26
	30 GB	Tk.2500	30 days	D33
2 mbps	10 GB	Tk.2500	30 days	D27
	40 GB	Tk.6000	30 days	D28
4 mbps	8 GB	Tk.3000	10 days	Activated Manually
	20 GB	Tk.6500	10 days	Activated Manually

### Postpaid Data Tariff Plan:

SPEED UPTO	USAGE	AMOUNTS	VALIDITY	SUBSCRIPTION CODE
256 kbps	3 GB	Tk.400	1 month	F1
	7 GB	Tk.700	1 month	F2
	UNL*	Tk.1050	1 month	F3
512 kbps	3 GB	Tk.500	1 month	F4
	7 GB	Tk.850	1 month	F5
	12 GB	Tk.900	1 month	F6
	16 GB	Tk.1150	1 month	F7
	UNL**	Tk.1500	1 month	F8
1 mbps	10 GB	Tk.1400	1 month	F9
	20 GB	Tk.2000	1 month	F10
	UNL***	Tk.3000	1 month	F11
2 mbps	10 GB	Tk.2500	1 month	F12
	20 GB	Tk.4000	1 month	F13
4 mbps	20 GB	Tk.6000	30 days	Activated Manually

(Teletalk Data Plan)

### 3 Telecom Industry Overview



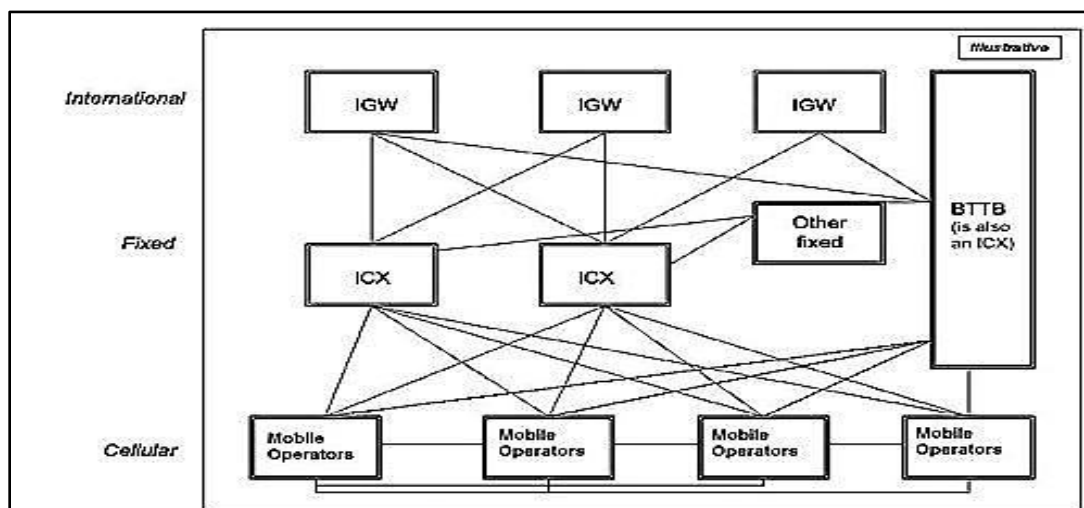
Cell phone has become an indispensable part for the people of Bangladesh everyday-life and has made our life safer and faster as we can communicate with others at any time when we need. So we really need to escalate the telecom-revolution and its relentless development that together have made this country more competitive with the developed and developing world. This is the prime communication device that we now use to express ourselves, get our work done and share our pains and desires to others. With the support of this cell phone technology different cell phone operators both local and foreign have established a strong base in Bangladesh. This operator's activities have taken this telecom industry on stage of saturation.

### 3.2 Structure of Telecommunication

In accordance with the National Telecommunications Policy 1998 and International Long Distance Telecommunications Services (ILDTS) Policy 2007, all cellular operators need to interconnect through Interconnection Exchange (ICX) and all international calls need to be controlled by the International Gateway (IGW) that needs to be connected to the cell phone and fixed operators through the ICXs.

In addition the Interconnection Exchange (ICX) will receive all calls from the cell phones and fixed operators whenever the call is made to other network and will pass it to the destination network if the call is local, and will pass to the IGWs if the call is international. ICX will also deliver calls received from IGWs where the call is destined (Telecommunications in Bangladesh, Wikipedia, 2012).

Below illustrate the structure of interconnection between different interfaces



**Figure 1:** Bangladesh Telecom Network Topology **Source:** Wikipedia

There are two types of cellular technology now present in Bangladesh, Such as-

**GSM:** GSM stands for "**Global System for Mobile Communications.**" This is mainly a European based system. However this system is almost unused in the United States. GSM can be said as a modified and far more efficient version of TDMA. GSM keeps the idea of timeslots and frequency channels. However it corrects several major shortcomings. As the GSM timeslots are smaller than TDMA technology, they hold less data but allow for data rates starting at 300 bits per second. Thus, a call can use as many timeslots as necessary up to a limit of 13 kilobits per second. When a call is inactive or may be compressed more, fewer timeslots are used. To facilitate filling in gaps left by unused timeslots, calls do "frequency hopping" in GSM. This means that calls will jump between channels and timeslots to maximize the usage of the system. A control channel is used to communicate the frequency hopping and other information between the cell tower and the phone. To compare with the other systems, it should be noted that GSM requires one Watt of output power from the phone. (GSM, Wikipedia, 2012)

**CDMA:** CDMA stands for "**Code Division Multiple Access**" and is both the most interesting and the hardest to implement multiplexing method. CDMA has been likened to a party: When everyone talks at once, no one can be understood, however, if everyone speaks a different language, then they can be understood. CDMA systems have no channels, but instead encode each call as a coded sequence across the entire frequency spectrum. Each conversation is modulated, in the digital domain, with a unique code (called a pseudo-noise code) that makes it distinguishable from the other calls in the frequency spectrum. Using a correlation calculation and the code the call was encoded with, the digital audio signal can be extracted from the other signals being broadcast by other phones on the network. From the perspective of one call, upon extracting the signal, everything else appears to be low-level noise. As long as there is sufficient separation between the codes (said to be mutually orthogonal), the noise level will be low enough to recover the digital signal. Each signal is not, in fact, spread across the whole spectrum (12.5 MHz for traditional cellular or 60 MHz in PCS cellular), but is spread across 1.25 MHz "pass-bands." Since CDMA offers far greater capacity and variable data rates depending on the audio activity, many more users can be fit into a given frequency spectrum and higher audio quality can be provided. The current CDMA systems boast at least three times the capacity of TDMA and GSM systems. The fact that CDMA shares frequencies with neighboring cell towers allows for easier installation of extra capacity, since extra capacity can be achieved by simply adding extra cell sites and shrinking power levels of nearby sites. CDMA technology also allows lower cell phone power levels (200 milliwatts) since the modulation techniques expect to deal with noise and are well suited to weaker signals. The downside to CDMA is the complexity of deciphering and extracting the received signals, especially if there are multiple signal paths (reflections) between the phone and the cell tower (called multi path interference). As a result, CDMA phones are twice as expensive as TDMA phones and CDMA cell site equipment is 3-4 times the price of TDMA equivalents. (Code division multiple access, Wikipedia, 2012)


### 3.4 Mobile Phone Operators

There are 6 mobile phone operators in Bangladesh. These are:

 Grameenphone Limited: Brand Name **“Grameenphone”**




(Official Logo of Grameenphone)

 Sheba Telecom Limited: Brand Name **“Banglalink”**




(Official Logo of Banglalink)

 Robi Axiata Limited: Brand Name **“Robi”**



(Official Logo of Robi)

 Teletalk Bangladesh Limited: Brand Name **“TeleTalk”**



(Official Logo of Teletalk)

 Airtel Bangla Limited: Brand Name **“airtel”**



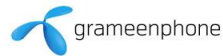
(Official Logo of Airtel)

 Pacific Bangladesh Telephone Limited: Brand Name **“Citycell”**



(Official Logo of Citycell)

Let's have a small discussion regarding those 6 cellular operators of Bangladesh.



Grameenphone is considered as the number one cellular operator in Bangladesh that having its operation GSM (Global System for Mobile Communication) technology. It has started its operation in Bangladesh operations on March 26, 1997. It is the only cellular operator public limited company that partly owned by Telenor (55.8%), Grameen Telecom (34.2%) and Public Share (10%). It is considered as one the fastest growing mobile telephone network in Bangladesh. Grameenphone's stated goal is to provide cost-effective and quality cellular services in Bangladesh. Moreover there are 2 technology support providers of Grameenphone those are Huawei and Ericsson. The tower range of GP exists 5-7 km. The technology used by Grameenphone is 1G (First Generation) which is supportable to 2G (Second Generation). The present CEO of Grameenphone is Mr. Tore Johnsen

### Product Offered

Grameenphone offers 2 categories of packages for its subscribers that are known as prepaid and postpaid.

**Prepaid:** This category includes 2 types of packages, such as-

- 🔹 **Prepaid Package:** shohoj, Bondhu, Apon, Smile etc.
- 🔹 **D-juice**

**Postpaid plan:**

- 🔹 **Xplore** (nationwide and international mobile and landline connectivity)

Grameenphone also offers different value-added services such as- SMS, MMS, Welcome Tunes, Voice SMS, SMS Push-Pull Service, Voice Mail Service and Fax and Data among others. Grameenphone was the first mobile operator in Bangladesh to offer EDGE services to its subscribers.

(About Grameenphone)



Banglalink is another major cellular operator in Bangladesh that started its business in February 2005 with its slogan “make it difference”. Formerly, it was known as Sheba Telecom Pvt. Ltd. It had been providing GSM (global system of mobile communication) services in Bangladesh since 1998. However in 2004, Orascom Telecom bought 100% share of Sheba Telecom as well as gave its new name as banglalink.

Nokia-Siemens network & Hawaii provides technological support to banglalink. The tower range of banglalink is 5-9 km. normally. However sometimes it varies to about 13-15 km. The technology used by banglalink is 1G (First Generation) which is supportable to 2G (Second Generation). Furthermore Banglalink has 1500 km. of Fiber Optic cable which ensures good network for subscribers.

## **Products Offered**

### **Prepaid Packages**

Banglalink currently offered prepaid packages are,

- Banglalink Desh
- Desh Ek Rate
- Desh Ek Rate Darun
- Banglalink Desh 7 fnf
- 1 Second Pulse
- Banglalink Desh 10 fnf

All the prepaid plans come in two phases—Standard (T&T incoming and outgoing with NWD and ISD) and M2M. All connections provide GPRS to subscribers.

### **Postpaid Packages**

At present there are three postpaid packages from banglalink. Those are Banglalink Inspire & Banglalink SMECU. All packages come with T&T local, NWD, ISD and e-ISD connectivity.

(About Banglalink)



Citycell (Pacific Bangladesh Telecom Limited) is the first cellular operator in Bangladesh. It is the only CDMA (Code Division Multiple Access) network operator in the country. Citycell is currently owned by Singtel with 45% stake and the rest 55% owned by Pacific Group and Far East Telecom.

In 1989 Bangladesh Telecom Limited (BTL) was awarded a license to operate cellular, paging, and other wireless communication networks. Then in 1990 Hutchison Bangladesh Telecom Limited (HBTL) was incorporated in Bangladesh as a joint venture between BTL and Hutchison Telecommunications (Bangladesh) Limited. HBTL began commercial operation in Dhaka using the AMPS mobile technology in 1993 and became the 1st cellular operator in South Asia. Later that year Pacific Motors bought 50% of BTL. By 1996 HBTL was renamed as Pacific Bangladesh Telecom Limited (PBTL) and launched the brand name “Citycell Digital” to market its cellular products. Mr. Mehboob Chowdhury is the present CEO of Citycell

Hawaii, Ericsson and Motorola provide technological support to Citycell. The tower range of Citycell exists in between 5-6 km. in case sometime it varies to about 9 km. The technology used by Citycell is CDMA1X (Code division multiple access). Citycell is consolidating its position in wireless data by launching their Zoom EV-DO (evaluation data optimize) for the broadband wireless internet service.

### **Products Offered**

Citycell offers prepaid, postpaid and fixed phone plans. Since Citycell operates in CDMA, RIM's are usually sold with phone mostly cheap Chinese sets produced by ZTE, Huawei, Samsung, Motorola and Alcatel. Citycell currently has the cheapest phone connection. However City cell's current business totally depends on its internet package “Zoom”

(About Citycell)



Airtel Bangladesh Limited is another GSM-based cellular operator in Bangladesh. Airtel is the sixth mobile phone carrier to enter the Bangladesh market, and originally launched commercial operations under the brand name "Warid Telecom" on May 10, 2007. Warid Telecom International LLC, an Abu Dhabi based consortium, sold a majority 70% stake in the company to India's Bharti Airtel Limited for US\$300 million. Bharti Airtel Limited took management control of the company and its board, and rebranded the company's services under its own airtel brand from December 20, 2010. The Bangladesh Telecommunication Regulatory Commission approved the deal on Jan 4, 2010. The present CEO of Airtel Bangla is Mr. Chris Tobit




## Products Offered

Airtel provides both post-paid and pre-paid connection plans. The post-paid plan is branded and marketed across the country under the name **airtel Postpaid**. The pre-paid segment is branded and marketed as **airtel Prepaid**.

The airtel Prepaid category is divided into five sub-categories

-  Adda
-  Golpo
-  Kotha
-  Foorti
-  Dolbol

The airtel Postpaid category is divided into three segments:

-  Airtel Exclusive
-  Airtel Classic
-  Airtel Advantage

(About Airtel)



Teletalk Bangladesh Limited is a public limited company, registered under the Registrar of the Joint stock companies of Bangladesh. Total shares owned by the Government of the People's Republic of Bangladesh. Teletalk Bangladesh limited was established keeping a specific role in mind. Teletalk has forged ahead and strengthened its path over the years and achieved some feats truly to be proud of, as the only Bangladeshi mobile operator and the only operator with 100% native technical and engineering human resource base, Teletalk thrives to become the true people's phone "AmaderPhone".

### **Product offered**

Teletalk is the only 3G service provider in Bangladesh. In addition to offering the fundamental pre-paid and post-paid mobile services, it offers a wide range of value added products and services such as, SMS, GPRS, mobile data services, infotainment services, SMS banking, Caller Ring Back Tone, Ringtones download, Picture Messaging, MMS, Voice Greetings.

The pre-paid packages are (both in 2G & 3G)-

- 📶 Ekush
- 📶 Bijoy
- 📶 Shadheen

And the post-paid packages are-

- 📶 Standard (rajanigandha)
- 📶 Shapla





Robi Axiata Limited is a joint venture company between Axiata Group Berthed, Malaysia (70%) and NTT DOCOMO INC, Japan (30%). It was formerly known as Telekom Malaysia International (Bangladesh) which commenced operations in Bangladesh in 1997 with the brand name AKTEL. On 28 March 2010, the service name was rebranded as 'Robi' which mean Sun in Bengali. The present CEO of Robi Axiata Limited is Mr. Michael Kuehner

### **Products offered**

Robi offers an array of different packages. In addition to offering the fundamental pre-paid and post-paid mobile services, it offers a wide range of products and services such as, SMS, GPRS, EDGE, international roaming, SMS banking, Caller Ring Back Tone, MMS, Voice Greetings, Call Blocking which give subscriber to control which call he or she receive or not and Bengali SMS. Robi has got the widest international roaming coverage among all the operators in Bangladesh.

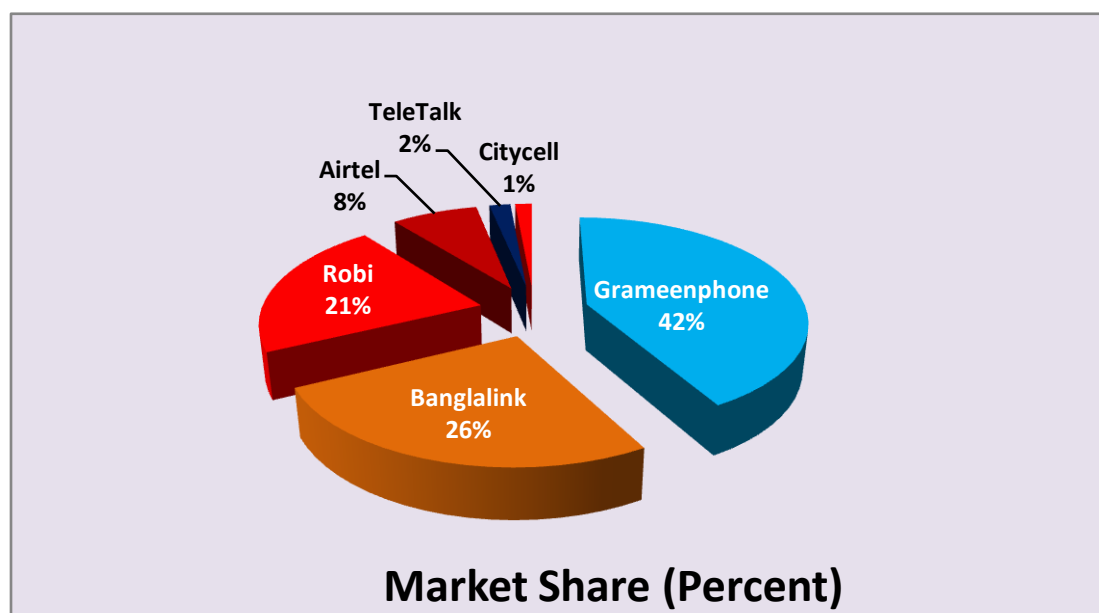
(About Robi)

### 3.5 Market Share Analysis

The Market Share analysis of 6 Mobile Phone Operators are given below-

Mobile Operators	Market Share (Million)	Market Share (Percent)
Grameenphone	<b>41.792</b>	<b>41.85%</b>
Banglalink	<b>25.921</b>	<b>25.95%</b>
Robi	<b>21.403</b>	<b>21.43%</b>
Airtel	<b>7.472</b>	<b>7.48%</b>
Teletalk	<b>1.831</b>	<b>1.83%</b>
Citycell	<b>1.451</b>	<b>1.45%</b>
<b>Total</b>	<b>99.871</b>	<b>100%</b>

**Table 1:** Market Share Analysis **Source:** (Mobile Phone Subscriber, 2013)









**Figure 2:** Market Share Pie Char of Cellular Operators in Bangladesh

According to the previous figure Grameen phone is holding the highest amount of market share than comes Banglalink and Robi. Other three mobile operators are controlling 11 percent of the total market shares. So it is providing a clear indication that competitions are going in between Grameenphone, Banglalink and Robi. Others three telecom operators are clearly away from them and they have to make a huge jump if they want to be in the competitions.

### Some Recent Updates by BTRC (March, 2013)

This is the last update by BTRC regarding the subscriber condition of different cellular operators in Bangladesh

-  Grameenphone added 7 lac 89 thousand new subscribers in February 2013
-  Banglalink added only 73 thousand new subscribers in February 2013
-  Robi added only 1 lac 12 thousand new subscribers in February 2013
-  Airtel Bangladesh added 1 lac 72 thousand subscribers in February 2013
-  Teletalk added 1 lac 39 thousand subscribers in February 2013
-  Citycell lost 8 thousand subscribers in February 2013

Total **1.28 million** new subscribers added in February 2013 include all operators.

(Mobile Phone Subscriber, 2013)

### 3.6 Prospects

#### **Expand Valued Added Services (VAS):**

While the mobile VAS market has been growing, a number of initiatives still need to be undertaken to fully develop this market. The VAS contribution to revenue is upwards of 20% in emerging markets such as China, even without introduction of 3G, as compared to sub 10% in India. Teletalk got 3G, so it is a must to encourage the development of a robust VAS ecosystem in areas such as Agricultural VAS, Mobile Banking, M-Health and M/E-Commerce.

#### **Convergence will become more important:**

If service providers build service converged networks, then financial services, public services, and entertainment converged applications will be able to reach a far larger portion of the population. This is likely to have major implications for BD Telecoms companies and may lead them to invest in ISPs but also in IPTV, Video and Media and also game development as well as domestic web content.

#### **Infrastructure Sharing:**

One of the major new initiatives in 2010 has been infrastructure sharing agreements between GP & Banglalink and Robi & Banglalink. This trend will continue not only because it is partly enforced by the regulator but also as a matter of practical necessity. There are Public Private Partnerships (PPPs) opportunities for the operators to partner up with the Government of Bangladesh (GoB) in service delivery across the areas of e-education, e-health and e-governance.

**Lower Broadband Costs:** There is a strong case for GoB to substantially reduce broadband wholesale price further to also accelerate broadband access to a broader range of the public. This might be done in conjunction with the installation of a second submarine broadband cable. The terrestrial connection with neighboring India will also help to lower the broadband bandwidth price in the country.

**Digital Bangladesh:** Push to develop ITES and Outsourcing presents new business opportunities/diversification by the Telecoms companies. Such a strategy is already being adopted by Grameenphone who have established GP IT as a separate company and one that is already the largest IT Company in Bangladesh with around 300 employees.

The Challenges facing the telecom industry of Bangladesh includes:

**High Competition:**

High competition in mobile or telecom sector in our country is one of the main problems. If we have a look in the primary stage of our telecom sector, we had only city cell and Grameenphone and they were operating their business in own way. They took the first mover advantages but when Banglalink, Robi, Teletalk, Airtel come to compete in the market then the market became more competitive and still there exist a high competition in this sector. So to face this competition/ challenge some of the operators are thinking to merge their business to survive in the market.

**Poor Economic Background:** As a least developed or developing country Bangladesh has a poor economic background where a major portion of our people are living under the poverty line. So it is difficult to operate such type of business in Bangladesh with making a remarkable profit. By considering this economic background, the telecom sector is to fixed the call rate, should reduce tax on SIM and sacrifice more to operate their business.

**Instable Political Situation:** Our previous history tells that Bangladesh is not a politically stable country. Different types of political violence, pressure of army, corruption and many more problems make our country instable and also has made this sector insecure. If we have a look last few year our democracy had face many ups and downs, as we don't have any foreign direct investment (FDI) in any of the sector.

**High Rate of Corporate Tax:** As the economic condition is not good of Bangladesh, the telecommunication sector is not able to make profit. Moreover they are to pay high corporate tax which is 40%-45%. It is another major problem or challenge to operate challenging day by day

**SIM Tax:** In Bangladesh the mobile operator is to pay Tk. 300 as tax in each SIM from fiscal year 2005-06. Firstly it was Tk. 1200 and later on by considering different facts it is fixed as Tk. 300. Though tax is to be paid by the subscribers directly but the company gives incentive to continue the sell the SIM at a lower price in the competitive market to hold their position. But now it become impossible for their all the company to carry on this burden. As the growth rate of the subscriber has been declined, the companies are in challenging position. (Sim Tax Reduce, 2013)

**Import Tax:** In case of technological perspective, Bangladesh is not good enough. So mobile phone operators is to transfer or import technologies, handsets and other equipment related to the telecommunication and for this they are to pay 35% import tax on it. It is also a great problem for this sector to make profit and survive in the market.

**3G License uncertainty:** The expected cost and terms on which 3G licenses will be issued remains unclear.

4 Assigned Division

## 4.1 Marketing and Sales Division

I am really lucky work in the marketing and sales department of Teletalk. It was my desire to work with the 3G marketing policy. I got the chance here.

Marketing and sales division is one of the most active departments in Teletalk. There activities are given below:

One of the major responsibilities of marketing & sales department are acquiring monthly sales target with the help of sales and distribution team.

Developing a strong brand image & build an uninterrupted market communication is another major responsibility of this department. So, all the types of marketing tools like advertisement, promotion are also done by this division.

Marketing and Sales department normally create & maintain a strong relationship with the corporate client. Because, this department normally with the corporate subscribers.

Marketing and Sales department is also responsible for the CSR activities. They also sponsor many events as a part of promotional strategy. Moreover, maintaining a good relationship with the media is also a job part of this division.

My job responsibilities during my internship are given below:

Basically, I work with the Sales & Distribution team within Marketing and Sales division.

On the 1<sup>st</sup> month of my internship, I go to different market with the sales and distribution team. I have noticed the market condition of Teletalk. By some days, I have started to learn the demand of suppliers, distributors, retailers & subscriber also. After the market visit, I need to report the overall market scenario to my supervisor. It helps me to learn about the root level market of Telecom sector.

Last 2 months, I work as the assistant officer in “Teletalk Caravan Project”. It is a dynamic project which basically runs by a 3<sup>rd</sup> party company. For the overall management of this project, Teletalk assigned me & an executive from Teletalk. The main purpose of this project is to create



Brand image and sale where opportunity exists. The caravan normally visits and takes place in different place of Dhaka city every day. After taking position, the brand promoter of the 3<sup>rd</sup> party distribute the leaflet of different packages. There is a 42 inch Lcd TV to display the TVC of Teletalk. Subscribers are also get limited amount of customer service from there. I am really lucky to work in this project.



## 5. Comparative Analysis of Teletalk BD LTD

## 5.1 Market Analysis

### 5.1.1 Market Characteristics

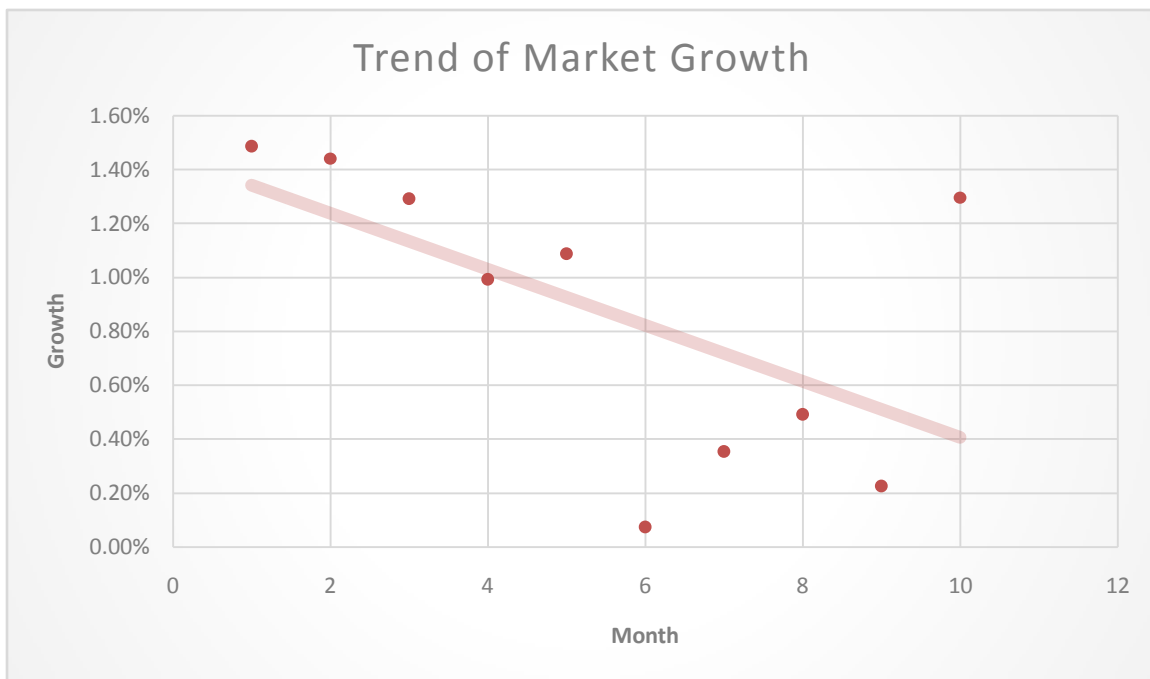
Mobile phone markets are one of the most turbulent market environments today due to the increased competition and rapid change of technology. The mobile market is also becoming increasingly important in developing countries, with benefits such as increased employment and wages. Bangladesh has a big market for mobile telecom business and the industry is expanding quickly. The estimated total population of Bangladesh was 154,991,191 on 27 May, 2013 and the total numbers of active mobile phone subscribers are 99.871 million at the end of March 2013, i.e. around 64.40% of total population use mobile phones. (Population of Bangladesh)

People are increasingly using the mobile handset and modem to access internet and other data services taking advantage of all the new products and services offered by the operators. Around 90% of total internet users are now accessing internet through the mobile network and mobile internet would continue its dominance with the planned introduction of 3G in 2013. The current internet penetration has reached almost 10% and it was due to the contribution of the mobile operators.

The price of mobile phone services in Bangladesh is at present one of the lowest in the world. According to a Nokia Siemens Network study, published in 2009, Bangladesh actually has the third lowest total cost of ownership (TCO) per month with US\$8.

### 5.1.2 Growth Potential and Trends

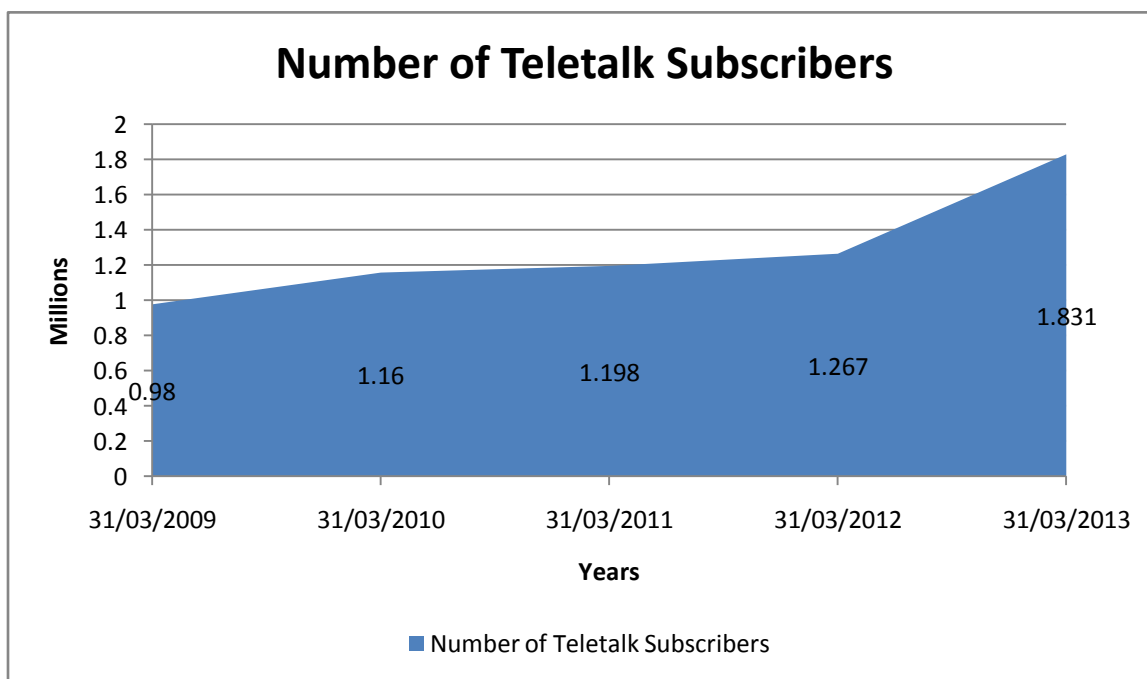
The mobile telecom sector is the fastest growing sector of the country and still there are around 55 million people who are yet to use cell phone. This implies that there are a lot unmet needs that could be a great potential for the industry. The literacy rate of the country is 67% which implies that major portion of the population have the academic depth to adopt new products and services, but they are highly price sensitive and prefer low prices for their poor economic condition. These statistics show that demographic trends are continuously diversifying, indicating why it is becoming ever so important to target specific customer groups, determine their needs, and then satisfy them. However, the overall trend of the industry shows that is downward sloping.



## 5.2 Performance of Teletalk over the Years

### 5.2.1 Subscribers

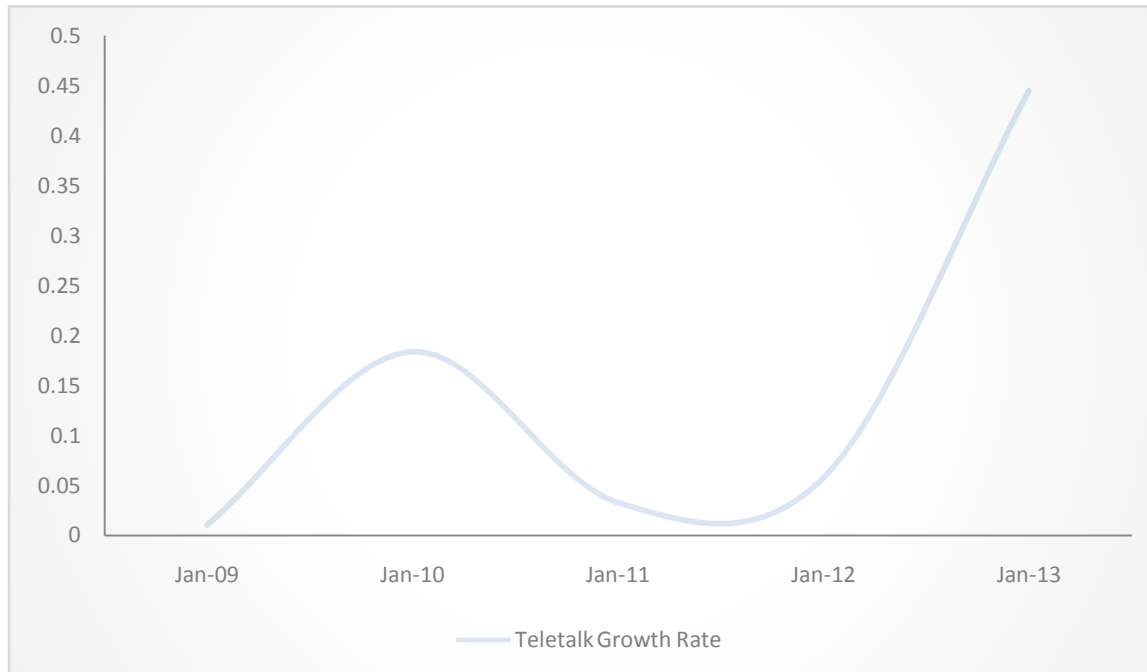
Teletalk Bangladesh Limited started their operation in 2004. Up to the year 2012, subscribers increased slowly. However, after adapting 3G technology, their subscribers increased dramatically. In fact, they are now the fastest growing operator in the market. The total number of subscribers has reached 1.831 million at the end of March 2013.



(Teletalk subscriber 2009) (Teletalk Subscriber 2010) (Teletalk Subscriber 2011)

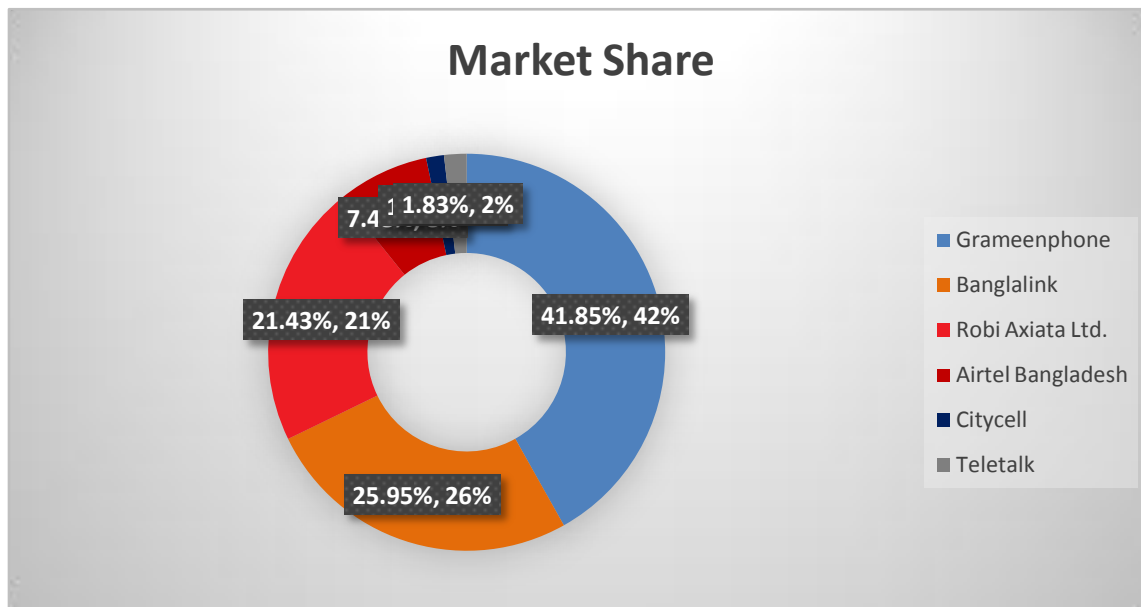
### 5.2.2 Growth Rate

The growth rate of teletalk is quite good. While the industry has been witnessing decreasing growth rates, Teletalk is actually experiencing an increasing growth rate recently. Specially, after getting 3G license the growth rate increase at an outstanding level.



### 5.2.3 Market Share

Teletalk has lost significant amount of market share to other operators. After launching 3G, it has gained a huge number of subscribers from other operators.



(Mobile Phone Subscriber in Bangladesh, 2013)

### 5.3.1 Origin

Citycell was the first mobile operator to enter the country. It was back in 1989 when Bangladesh Telecom Limited was awarded a license to operate cellular, paging and other wireless communication networks. However, it was not until February, 1996 that the company was renamed as Pacific Bangladesh Telecom Limited (PBTL) and the Citycell brand launched, just a year ahead of GP.

Grameenphone (GP) was formed through a joint venture between Telenor, a leading Norwegian mobile company, and Grameen Telecom, a not-for-profit organization established by Professor Dr. Yunus. More than 55% ownership belongs to Telenor while 34% ownership belongs to Grameen Telecom. The rest are publicly traded.

Telecom Malaysia International Bangladesh (TMIB) Ltd. was formed through a joint venture between Telecom Malaysia (70% equity interest) and A.K. Khan & Co. Ltd. back in 1996. They launched their mobile service, branded AKTEL, in 1997. However, on March 28, 2010 the company rebranded to Robi. Now the company is a joint venture flanked by Axiata Group Berhad, Malaysia & NTT DOCOMO Inc., Japan.

Banglalink entered the market in 2004. Naguib Sawiris, Chairman CEO of Orascom Telecom Holdings announced the acquisition of Sheba Telecom (Pvt.) Limited with a cost of US\$60m in that year. Since its inception, it has been very aggressive to gain market share in the country.

Teletalk caused quite a stir when it was finally formally introduced on December 28, 2004. The company gained 2.5 lac subscribers within the first few months. However, its growth faltered. But after adopting 3G in October 2012, the growth rate has increased at an excellent amount.

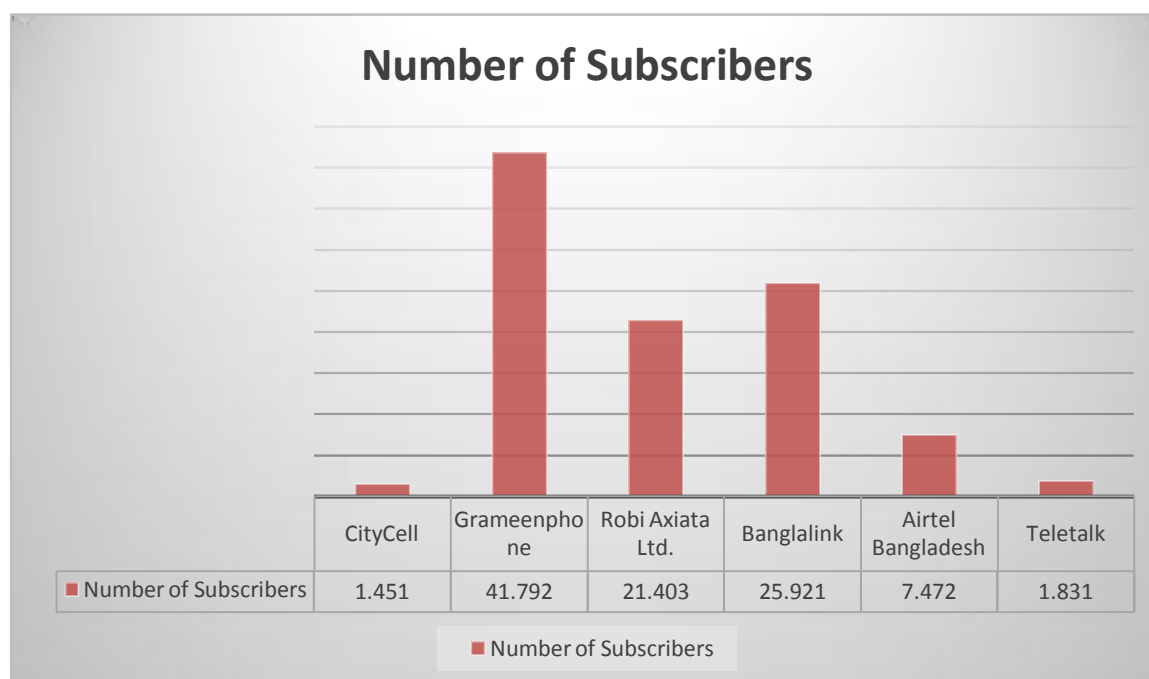
Airtel Bangladesh Ltd. originally launched commercial operations under the brand name "Warid Telecom". In December 2005, Warid Telecom International LLC paid US\$ 50 million to obtain a GSM license from the BTRC. It sold a majority 70% stake in the company to India's Bharti Airtel Limited for US\$300 million. Bharti Airtel Limited took management control of the company and its board, and rebranded the company's services under its own airtel brand from December 20, 2010.

	Citycell	Grameenphone	Robi	Banglalink	Teletalk	Airtel
<b>Origin</b>	Pacific Bangladesh Telecom Limited <b>(Bangladesh)</b>	Telenor <b>(Norway)</b>	Axiata Group Berhad <b>(Malaysia)</b>	Orascom <b>(Egypt)</b>	BTCL <b>(Bangladesh)</b>	Bharti Airtel <b>(India)</b>

Origin of Majority Stakeholders

### 5.3.2 Subscribers Analysis

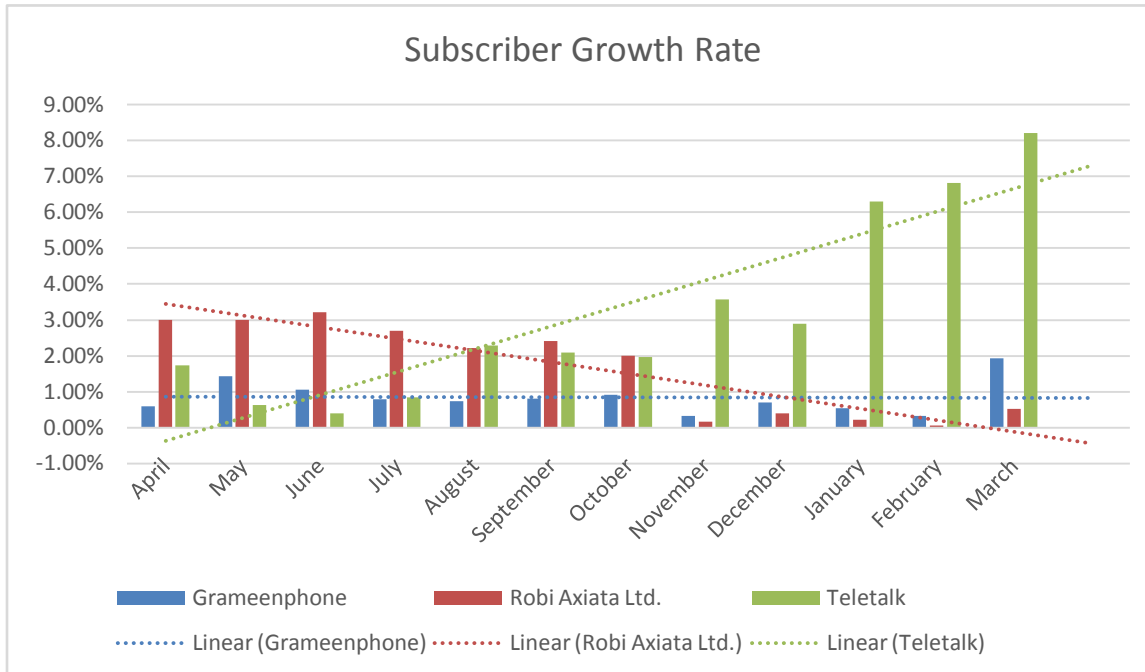
Grameenphone is at present leading the industry with 41.792 million subscribers out of a total market size of approximately 99.871 million subscribers as of March, 2013. Banglalink proudly boast of 25.921 million subscribers in the network and the second position in the industry. Robi is growing fast with 21.403 million subscribers. Although Citycell is the first mobile operator in the country it has only 1.451 million. Teletalk stands at bottom with 1.831 million subscribers.



(Mobile Phone Subscriber 13)

### 5.3.3 Growth Rate

Growth rate of subscribers from April, 2012 to March, 2013 are given below.



(Appendix)

The result of the analysis is interesting as it is a common perception Grameenphone has the almost constant subscriber growth rate. At the starting, Robi had a good growth but gradually it has reduced. On the other hand, Teletalk incurred an excellent subscriber growth rate after the inauguration of 3G in October, 2012.



## 5.4 SWOT Analysis of Operators

To understand the business environment of a particular firm, we need to analyze both the general environment and the firm's industry and competitive environment. One of the most basic techniques for analyzing firm and industry conditions is SWOT analysis. It is a widely used technique through which managers create a quick overview of a company's strategic situation.

### **5.4.1 Grameenphone**

#### **Strengths:**

Providing quality services is one of the basic strength of Grameenphone. Grameenphone has the best network coverage, strong brand image, skilled workforce, strong financial position, excellent customer service, world class working environment.

#### **Weaknesses**

High tariff rate charge for different products and services is a major weakness for Grameenphone. Besides, different recent news about the employee dissatisfaction within organization also creates a negative impression in the market.

#### **Opportunity**

As GP has the maximum network coverage in Bangladesh, so it has a huge opportunities in the internet market in Bangladesh. As rural area users have limited alternative options, so GP can earn huge market share from here.

#### **Threats**

The adoptability of upcoming technology (3G) with technological infrastructure is a challenge. Rapid changes and advancement in existing cellular technology, changes in customers' needs, proliferation of substitutes in the market etc. also pose threats to the company. IP telephony, by VoIP service providers, is the new threat in telecom industry. It has the potential to buoy a raft of new household brand.

### **5.4.2 Banglalink**

#### **Strengths**

Lucrative product offerings are one of the basic strength of Banglalink. Easy to understand is one their basic criteria for any offer. They also have one of the largest (1,500 kilometer) optical fiber networks in Bangladesh.

#### **Weaknesses**

Low quality of network, lowest ARPU in the market are the major weakness of Banglalink. So, while it is true that Banglalink started the price war, it now needs to find a way to increase its revenue. Though their advertising expenditure is high but it is losing appeal.

#### **Opportunities**

The disposable income of people in Bangladesh is increasing every year. In addition, Bangladeshi market has high mobile phone acceptability. This may help them in increasing their ARPU. They can form new alliances with eminent companies of different countries to achieve higher competitiveness and bring more expertise inside the company. The company has the opportunity of external funding from various sources. The company's management is seeking for merger or acquisition opportunity from the industry. Moreover, the company is planning to raise capital through issuing Initial Public Offering (IPO).

#### **Threats**

Banglalink grab its market by a price war. But, another price war would be a huge blow for Banglalink. They cannot sustain on such revenue. Inflation in the economy is also a threat for Banglalink. Another threat is the huge subscriber base of Grameenphone & 3G of Teletalk also.

### **5.4.3 Robi Axiata**

#### **Strengths**

Good network coverage & strong branding is the major strength of Robi. The Chittagong division is a stronghold of Robi and it is a preferred brand there. They have the widest roaming coverage. Their HR is also very skilled. Their subscriber base also provides stable revenue.

#### **Weaknesses**

Limitation in customer service is one of the weaknesses of Robi Axiata. Product innovation skills are not that much effective. They have too many products and packages which causes confusion in the minds of the consumers.

#### **Opportunities**

Push to develop ITES and Outsourcing presents new business opportunities/diversification for Robi. We have already seen such a strategy being adopted by market leader GP who have established GP IT as a separate company and one that is already the largest IT Company in Bangladesh with around 300 employees.

#### **Threats**

3G license can be a major threat for them. If they cannot take the 3G license, then Robi will surely lose a huge number of subscribers

#### **5.4.4 Airtel Bangladesh**

##### **Strengths**

Airtel has one of the most advanced networks in the country. Although they do not have the best coverage but the quality of the network is high. They are providing the lowest call rate now.

##### **Weaknesses**

Insufficient network coverage is one of their major weaknesses. Their product design and marketing are also weak. Their Value Added Services (VAS) is not also at par with the competition. The brand is also new relative to the competition. So they need time to build a loyal customer base.

##### **Opportunities**

Offering new & exclusive VAS can be a major opportunity for them.. They may also go for network sharing with the other operators to boost network quality in the short term.

##### **Threats**

High government tax and SIM tax is a threat for Airtel Bangladesh. SIM tax is particularly important because unlike Grameenphone, Banglalink and Robi Axiata they do not have a large install base. Wide coverage of competitors is also a serious threat. There is also a negative perception about the company in the minds of the people because it is an Indian brand.

### **5.4.5 Teletalk**

#### **Strength**

Being a public company, it is the preferred brand of the people. It also has the 3G license ahead of the competition which gives them a huge advantage.

#### **Weaknesses**

As it is a company owned by the government, the administration is bureaucratic. Hence, it is slow to react to the market changes. The HR is not very skilled like the competition. The turnover rate of the employees is very high. The management is also not very efficient. Network coverage is also not adequate. Customer service is also not in standard.

#### **Opportunities**

After adopting 3G technology, their opportunity is really increase. Teletalk can offer more VAS which will bring new subscribers. They can design more attractive offer as they have the updated technology.

#### **Threats:**

The governing body is itself a threat for Teletalk. In efficient employees is another threat. The major threat will be the scenario of the market when 3G service will goes to other companies. As competitors company has better infrastructure & organizational capability, so Teletalk may lose their market after the 3G auction.

### **5.4.6 Citycell**

#### **Strengths**

Citycell is the only CDMA service provider in Bangladesh. They have strong network coverage. Their underlying technology also has some strengths that their competitors cannot provide. Moreover, they have one of the best data services in the country.

#### **Weaknesses**

The main weakness of Citycell is CDMA. Although CDMA is quite an advanced technology itself, it did not take off in Bangladesh. The lack of preferred handsets is also another issue that they need to solve in order to achieve high growth.

#### **Opportunities**

Opportunities of Citycell lie in the upcoming 3G technology. 3G is the future of telecom in Bangladesh and if they can get on the bandwagon it will help them to be a major force in the industry.

#### **Threats**

According to reports, Citycell is planning to provide GSM services. However, whether they will be able to provide the same services in GSM technology is not confirmed. If they fail to get a 3G license, they will remain one of the minor players in the market. Introduction of Wi-Max services in the country have caused uncertainty in their data business as well.

According to the last few years, the competitive environment in the telecom industry has become intensely competitive, with not only constant special offers and new value added services, but also with new and bigger entrants, and their aggressive marketing. The following sections describe the competitive environment in the industry using Michael Porter's five forces model.

### 5.5.1 Threat of Rivalry

At the very beginning in the telecom industry, Grameenphone and AKTEL dominated the market. Both of the companies never did anything to reduce their charges for their consumers. But, at 2004 when Banglalink and Teletalk came to the market, market change drastically.

Banglalink entered the market with a huge shake and kept the mindshare of the people over the years. Ever since Banglalink entered the market the industry has been on shaky grounds. Suddenly all telecom companies stepped up their promotions. Banglalink started the first price war to penetrate the market and although this was good news for the subscribers, it was not the same thing for the operators. Revenue dropped fast and all the operators changed their strategy to volume based model of business.

After the rebranding, Robi has increased all of its branding & promotional activities. Besides, it also becomes aggressive in its campaigns. They have greatly increased their branding & advertising expenditures. As a result, it is now more visible and Robi becomes the well known company.

After launching Teletalk, competition becomes even more. Because, it had started to offer interconnection with T&T (BTCL) in a cheaper & broader way. So, people grab it. But, after a few days it loses its demand as it did not have any interconnection with the other private mobile operators. As a result, sales suffered and Teletalk never achieved the critical mass necessary to have an impact in the market.

After acquiring Warid, Airtel is constantly trying to capture market share. The visibility of the company is quite good. Combined with low call rate, it has the potential to be a big player.

So, the rivalry among existing competitors is **very high**.

### 5.5.2 Threat of New Entrants

Mobile Telecom is capital and resource intensive business which poses a significant entry barrier for potential players in Bangladesh. All the existing company has a strong market & brand name. Government rules and regulations- like imposition of huge tax on SIM card, strong tariff control by the authority, can also create difficulties to entrants; in addition the price battle between the competitors brought the tariffs to its lowest in this region. Due to control over licenses, the major barrier to entry in Bangladesh mobile telecom market is to obtain a radio spectrum license from BTRC. However, companies are finding other ways to enter the industry, i.e. through merging with existing operators. For example, Bharti Airtel acquired 70% stake of Warid Telecom and rebranded as 'Airtel' in order to enter the Bangladesh market. Hence it seems that the threats of new entrants in mobile industry are **moderate to weak**.

### 5.5.3 Threat of Substitute Products

Mobile telecommunications is a high-tech industry and the substitutes that would replace the products or services of today are strongly related to the factor of innovation. In case of Bangladesh mobile telecom industry, substitutes exist in the form of government fixed-land lines and some upcoming PSTN operators. Some additional substitutes include VoIP service providers (VSP), Skype, Google Talk, wireless Internet providers such as WiMax based companies etc. However, there is no strong competitive substitute for mobile telecom industry as the existing alternatives are either nearly obsolete or in embryonic stage and thus poses very little threat to the industry.

Teletalk is only among the five operators in the country who provide services using 3G technology. Citycell is the only operator based on CDMA technology. Almost all of the companies provide basic data services. But, Teletalk offers 3G service which can be a basic differentiator in the market. But, Teletalk will not get this advantage for long time as other mobile operators will also get it very soon.

So, the threat from substitutes is **weak** in Bangladesh.



#### **5.5.4 Bargaining Power of Buyers**

Now, there are 6 mobile operators running their business in Bangladesh whose are offering almost similar types of services. Besides, switching costs between operators are also low which provide buyers with extremely high bargaining power. But, the scenario is not same for the remote area where network alternative network is not available. But, in generally bargaining power of buyers in this industry is **very high**.

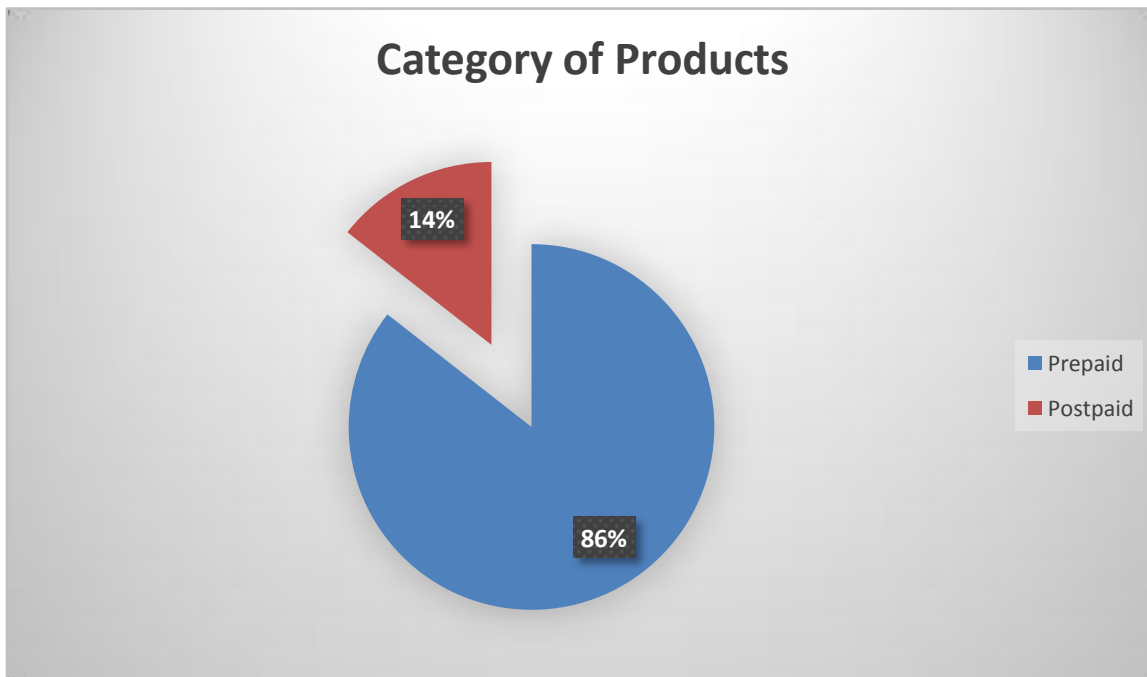
#### **5.5.5 Bargaining Power of Suppliers**

All the mobile operators have international identity and have experience to work in the global platform. The companies have the opportunity to acquire necessary equipment from different international chains across the globe. The bargaining power of suppliers in the mobile industry varies depending on the brand name and strategic importance of the supplies as well as the size of the Company, such as Ericsson and Nokia Siemens in the mobile telecom machinery industry is that type of suppliers who enjoy strong power in the industry. On the other hand there are many potential suppliers and vendors in telecom industry e.g. Cisco, Siemens Enterprise Communications, Alcatel-Lucent, Huawei and Motorola, Nortel, Oracle, Nokia, Samsung, Juniper, Converse, HP, Sun etc. In 2010, Huawei, the Chinese telecom equipment manufacturer, was one of the major suppliers of telecom equipment in Bangladesh and its major clients include Grameenphone, Banglalink, Robi, Citycell, Teletalk and BTCL; while VimpelCom (a.k.a 'BeeLine') provided voice and data services to Djuice of Grameenphone and Banglalink, and ACME Tele Power Ltd. (India) provided solar power support to Grameenphone. Recently, Huawei Technology played an important role in modernizing GP's network infrastructure on the new 3G platform (Star Business, 2010). All of these available resources ensure competitive price and abundant supply support to the country's telecom industry. Therefore, the bargaining power of suppliers in the industry is **moderate to weak**.

## 5.6 Comparison of Products and Services

A very good pricing of products and services is very important in a price sensitive country like Bangladesh. As a result, analyzing the pricing of different operators can be a great tool to measure their competitiveness. Before that however, it is important to find out which products are the most popular in the market.

### 5.6.1 Subscribers by Categories



(Hossain, 2013)

Although prepaid packages dominate their sales, but postpaid subscribers are the most stable revenue source. As companies give lower tariffs & frequent offers for prepaid services, so prepaid packages are very popular in the country. In fact, more than 80% of their subscribers are on prepaid packages. Teletalk mainly focus more on their prepaid services. So, they need to increase their subscribers for prepaid packages if they want to increase their revenue.

### 5.6.2 Comparison of Pricing of Packages

## Prepaid

### On Net Tariff Rate per 10 seconds

	Grameenphone	Banglalink	Robi	Airtel BD	Citycell	Teletalk
	Axiata					
<b>Tariff</b>	15 Paisa	14 Paisa	15 Paisa	13.1 Paisa	14 Paisa	10 Paisa
<b>Package Name</b>	Nishchinto	Desh	Goti 36	Kotha	Citycell One	Projonmo 3G
<b>Pricing Strategy</b>	Premium	Economy	Premium	Economy	Economy	Penetration

Grameenphone and Robi are clearly charging a premium for their excellent network quality. They are following premium pricing strategy. Banglalink, on the other hand is offering lower tariff rate to increase their subscriber. They are basically using economy pricing strategy right now. By using this strategy, they can offer a very basic & minimum service charge. Citycell also follow economy pricing strategy. Airtel Bangladesh follows economy pricing strategy to attract the subscriber. Teletalk is offering country's lowest call charge which indicates that they are trying to take position in the market. They are following penetration pricing strategy. They also get the result of it. According to the data of last few months Teletalk has the highest growth in the market.

### Off- Net Tariff Rate per 10 seconds

	Grameenphone	Banglalink	Robi	Airtel BD	Citycell	Teletalk
	Axiata					
<b>Tariff</b>	15 Paisa	14 Paisa	15 Paisa	13.1 Paisa	14 Paisa	16 Paisa
<b>Package Name</b>	Nishchinto	Desh	Goti 36	Kotha	Citycell One	Projonmo 3G
<b>Pricing Strategy</b>	Economic	Economic	Economic	Penetration	Economic	Economic

It can be seen that pricing for on-net and off-net packages are almost the same. This may be because operators are trying to simplify their packages and not overwhelm their customers with numbers. Here, except Airtel all the operators are using economic pricing strategy. Because, all of them want to increase their subscriber. But, Airtel is using penetration pricing to enter into the prepaid market. Basically, Airtel target youth segment. Normally, youth segment consider price before call. For this reason, Airtel is using penetration pricing strategy.

## Postpaid

Although the operators have different pricing for different packages, I have compared their pricing for the leading package of each operator.

### On-Net Tariff Rate per 10 seconds

	Grameenphone	Banglalink	Robi	Airtel BD	Citycell	Teletalk
			Axiata			
<b>Tariff</b>	20 Paisa	16.5 Paisa	15 Paisa	8.16 Paisa	20 Paisa	13.3 Paisa
<b>Package Name</b>	Xplore	Inspire	Package 2	Classic	Citycell One	Shapla
<b>Pricing Strategy</b>	Premium	Economic	Economic	Penetration	Premium	Penetration

Grameenphone has the highest number of postpaid subscribers. They also have the best network quality and superior customer service. Therefore, it is not wonder that they are charging a premium. So, they are following premium pricing strategy. Robi & Banglalink is trying to increase their postpaid subscribers. So, they are charging a bit low price. So, they are following economic pricing strategy. Airtel on the other hand has the lowest tariff in the market in the postpaid category. They are following penetration pricing strategies in order to get maximum number of subscribers as their main target market is youth segment. Citycell is charging a high tariff. It's a wonder that Citycell is charging as same as GP. But, their postpaid package sales are also discontinued. Teletalk is using penetration pricing strategies as they are trying to get new subscriber asap. So, they use this strategy to remain in the competition.

### Of-Net Tariff Rate per 10 seconds

	Grameenphone	Banglalink	Robi	Airtel BD	Citycell	Teletalk
			Axiata			
<b>Tariff</b>	20 Paisa	16.5 Paisa	15 Paisa	15.6 Paisa	20 Paisa	16.5 Paisa
<b>Package Name</b>	Xplore	Inspire	Package 2	Classic	Citycell One	Shapla
<b>Pricing Strategy</b>	Premium	Economy	Economy	Economy	Premium	Economy

Again Grameenphone is charging high as they are premium in quality. Banglalink, Robi, Airtel, Teletalk all are following economy pricing strategy here. Because, all of them want to increase their postpaid subscribers. Recently, Citycell has shut down of its postpaid package sales.

(Pricing Strategis)

## Chapter 6: Summary

Overall findings of the report are given below:

- Grameenphone is the leading mobile phone operator with more than 40 million subscribers. They have the best network coverage but charging high for their services.
- Banglalink has better product quality and they are providing the lowest price but their network quality needs to be improved to get more subscribers.
- Robi is one of the major competitors in Bangladesh. Their network coverage is also better. But, product development & customer service team should work more effectively.
- Airtel is another growing mobile operator. Their main target market is the youth segment. Their product is good. But, they need to expand their network coverage & improve network quality.
- Teletalk is the only 3G service provider in Bangladesh right now. Their high speed internet, video call facility & mobile TV service has already created a buzz in the market. But, they need to expand their 3G network & design new product.
- Citycell is the only CDMA operator in Bangladesh. CDMA is the most updated technology than GSM. But, Citycell cannot take the advantage of it. They have a strong network base. But, they should offer more attractive offer. Moreover, they should offer new attractive handset.

After working the whole report, some recommendations has come to my mind. Those are given below:

- ☞ First of all Teletalk should enrich their brand image. At the time of market visit during my internship, I noticed that a huge number of people considered Teletalk as a low profile brand. Their perception about Teletalk is that Teletalk service is not good. So they need to build a strong brand image.
- ☞ Teletalk should expand their network coverage. Now Teletalk has 2G network coverage in 64 districts & 3G coverage in Dhaka, Narayanganj Town & Chittagong only. Their network is basically covered on town area. So, it is really hard for any subscriber to get network in the village area. In order to compete, their network coverage should be increased. Otherwise, they will lose the first mover advantage for 3G Service.
- ☞ Right now, Teletalk has the highest internet speed among all the mobile operators. So, they should focus more on their data business.
- ☞ After getting 3G, Teletalk is offering Mobile TV service which becomes so much popular among subscribers. So, they should offer more VAS as they have the latest technology.
- ☞ Customer service of Teletalk is one of the major improvement areas. Their helpline number 121 normally does not work properly. Teletalk customer service department does not have adequate resource including manpower & instrument. So, subscriber is extremely dissatisfied about their customer service. Teletalk governing body should take it as a prior concern & should take necessary steps.
- ☞ For the success of any organization, they need skilled workforce. To become skilled, employee needs routine training facility. Teletalk has one of the weakest HR in Bangladesh. So, Teletalk should build a strong HR team. So that, their employee will be as skilled as motivated.



### 6.3 Conclusion

Doing internship with the country's first 3G service provider "Teletalk" is my immense pleasure. It is more satisfactory when I can write a conclusion after successfully complete my internship. In my whole report I tried my best to provide as much information as possible. I said as possible, because of the confidentiality issues of Teletalk I cannot take much information from office.

Telecom industry in Bangladesh is highly competitive. In this competitive environment, Teletalk was a small player before October 2012. At October 2012, Teletalk launches country's first 3G services in Bangladesh. After that, the growth increase in an excellent rate. On October 2012, the total number of Teletalk subscriber was 1.3 million. At the end of March 13, the number of total subscribers becomes 1.8 million. On March 13, subscriber growth rate was 8.21. So, the growth of Teletalk is increasing day by day.

At the ending, it can be said that Teletalk started to become one of the preferred brand among the subscribers for some unique service offerings. If they can not only maintain their quality but also introduce new services, their future will be bright in future.

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Chapter 8 : Appendix

**Appendix:**

	<b>GP</b>	<b>Banglalink</b>	<b>Robi</b>	<b>Airtel</b>	<b>Citycell</b>	<b>Teletalk</b>	<b>Total</b>
Nov-11	36.113	23.367	15.855	5.801	1.739	1.198	84.07
Dec-11	36.493	23.753	16.139	6.026	1.824	1.218	85.45
Jan-12	36.997	23.881	16.519	6.107	1.803	1.249	86.56
Feb-12	37.351	24.168	17.087	6.231	1.791	1.257	87.89
Mar-12	37.786	24.221	17.586	6.287	1.750	1.267	88.897
Apr-12	38.012	24.467	18.114	6.389	1.735	1.289	90.006
May-12	38.557	24.864	18.656	6.472	1.711	1.297	91.557
Jun-12	38.963	25.164	19.257	6.535	1.698	1.302	92.919
Jul-12	39.271	25.566	19.775	6.676	1.657	1.313	94.258
Aug-12	39.562	25.983	20.212	6.746	1.631	1.343	95.477
Sep-12	39.879	26.038	20.701	6.825	1.612	1.371	96.426
Oct-12	40.244	26.213	21.116	6.938	1.596	1.398	97.475
Nov-12	40.374	26.053	21.150	6.978	1.543	1.448	97.546
Dec-12	40.653	26.002	21.234	6.993	1.519	1.490	97.891
Jan- 13	40.868	25.963	21.279	7.201	1.477	1.584	98.372
Feb- 13	41.003	25.848	21.291	7.300	1.459	1.692	98.593
Mar- 13	41.792	25.921	21.403	7.472	1.451	1.831	99.871

Figure 1: Number of subscribers of all mobile operators

	GP	Banglalink	Robi	Airtel	Citycell	Teletalk	Total
11-Dec	1.052%	1.652%	1.791%	3.879%	4.888%	1.669%	1.641%
12-Jan	1.381%	0.539%	2.355%	1.344%	-	1.151%	2.545%
12-Feb	0.957%	1.202%	3.438%	2.030%	-	0.666%	0.641%
12-Mar	1.165%	0.219%	2.920%	0.899%	-	2.289%	0.796%
12-Apr	0.598%	1.016%	3.002%	1.622%	-	0.857%	1.736%
12-May	1.434%	1.623%	2.992%	1.299%	-	1.383%	0.621%
12-Jun	1.053%	1.207%	3.221%	0.973%	-	0.760%	0.386%
12-Jul	0.790%	1.598%	2.690%	2.158%	-	2.415%	0.845%
12-Aug	0.741%	1.631%	2.210%	1.049%	-	1.569%	2.285%
12-Sep	0.801%	0.212%	2.419%	1.171%	-	1.165%	2.085%
12-Oct	0.915%	0.672%	2.005%	1.656%	-	0.993%	1.969%
12-Nov	0.323%	-0.610%	0.161%	0.577%	-	3.321%	3.577%
12-Dec	0.691%	-0.196%	0.397%	0.215%	-	1.555%	2.901%
13-Jan	0.529%	-0.150%	0.212%	2.974%	-	2.765%	6.309%
13-Feb	0.330%	-0.443%	0.056%	1.375%	-	1.219%	6.818%
13-Mar	1.924%	0.282%	0.526%	2.356%	-	0.548%	8.215%

Figure 2: Growth Rate of all mobile operators

Product Category	Number of Subscribers	Percentage (%)
Prepaid	1566603.6	85.56%
Post-paid	264396.4	14.44%
<b>Total</b>	<b>1831000</b>	<b>100%</b>

Figure 3: Subscribers in Different Product Category