

CONSUMERS' EXPECTATIONS FROM MOBILE TELECOMMUNICATION OPERATORS: BANGLADESH PERSPECTIVE

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Abstract: Bangladesh is a very lucrative market for mobile telecommunication because of huge customers it has. This opportunity is attracting the foreign giants to enter into this market; as a result the competition is getting intense day by day. To cope with the situation the mobile telecommunication service providers (MTSPs) of Bangladesh Telecommunication Industry are seriously considering customer expectations, service quality and other add-on-services. This research demonstrates how the local and international mobile telecommunication service providers (MTSPs) are trying their best to bring the services to the satisfactory level for the demanding customers. It also analyses how the MTSPs are customizing their offers as per the necessity of the prospective customers. The service providers are going for segmented marketing and trying to develop focused marketing programs so that they can reach and offer the superior service to the targeted segment. When an MTSP is targeting the young segment another MTSP is targeting the ladies segment. This paper analyses the collected information about the expectations of the customers of mobile telecommunication service and tries to find out the factors affecting selection of an MTSP and subsequently lays out some recommendations to the mobile telecommunication service providers (MTSPs).

Keywords: Prospective customer, MTSP, Segmented marketing, Focused marketing program, VAS.

INTRODUCTION

Telecommunication industry in Bangladesh is considered to be the most competitive industry of the country. The sector started its journey when Government of Bangladesh allowed one private operator (Citycell) with the issuance of a license in 1989. Previously, it was a monopolistic market operated by Bangladesh Telegraph and Telephone Board (BTTB) which was a fixed phone service provider solely controlled by the government. In 1990s significant change was observed in the market when government allowed some other private fixed and mobile phone operators. Within very short time mobile

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telecommunication became one of the most dominant service sector of the country with its growing network coverage (Upal, 2008). Foreign investors were attracted to do business in this sector because they observed that Bangladesh is a populous country where number of customers is huge. This sector has observed a phenomenal growth in recent years (BTRC, 2009). As a result, this industry has been turned out as one of the biggest business sectors of the country.

Currently, 6 mobile phone operators are providing service to the customers: Airtel Bangladesh Ltd. (Airtel), Telenor Bangladesh Ltd./ Grameen Phone Ltd. (GP) (Grameenphone), Orascom Telecom Ltd./ Banglalink Digital Communications Limited (Banglalink), Pacific Bangladesh Telephone Ltd. (Citycell), Axiata Bangladesh Ltd. (Robi) and Teletalk Bangladesh Ltd. (Teletalk). According to Bangladesh Telecommunication Regulatory Commission (BTRC, 2014), the number of subscribers is provided as in Table 01:

Table 01: No of Subscribers of Various operators

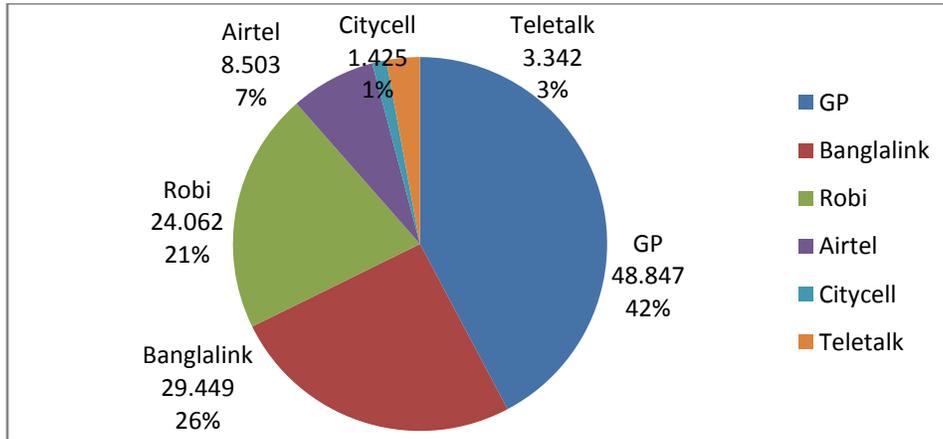
Operators	Active Subscribers (in million)
Grameen Phone Ltd. (GP)	48.847
Banglalink Digital Communications Limited	29.449
Robi Axiata Limited (Robi)	24.062
Airtel Bangladesh Limited (Airtel)	8.503
Pacific Bangladesh Telecom Limited (Citycell)	1.425
Teletalk Bangladesh Ltd. (Teletalk)	3.342
Total	115.627

Source: BTRC (2014).

From this table, it is observed that out of a total of around 116 million subscribers, GP overwhelmingly leads the market with 49 million (approximately). This is followed by Banglalink and Robi vying closely with each other with around 29 and 24 million, respectively. Airtel stands fourth while the only government owned operator i.e., Teletalk comes in the fifth position with approximately 8 million and 3 million subscribers respectively. The once pioneer Citycell has significantly lost its subscriber base, currently enjoying about 1.5 million only.

The market share of these mobile operators is presented as in the following Figure 01.

Figure 01: Market Share of Mobile Operators



As can be seen from Figure 1, the market share of GP stands at 42%, followed by Banglalink at 26%, Robi at 21%, Airtel at 7%, Teletalk at 3% and Citycell at 1%.

LITERATURE REVIEW

In the field of communication, the introduction of mobile telecommunication service and its rapid and wide spread growth is the most significant development. The industry is highly competitive now-a-days. In such a situation, choosing a mobile operator becomes a complicated problem to a customer who has to select the most appropriate communication operator. (Hemmati et al., 2012).

In Bangladesh also this sector has emerged as the most dominant service sector which demands in-depth research for further development. However few researches have been conducted so far to identify the factors shaping customer's choice of an MTSP.

In a study done in India by Shah (2012) it was argued that the main factors that were instrumental for growth of mobile service industry were: huge competitions, advancement in technology, reduced tariff and falling handset price. The author also observed that mobile telecommunication has become an indispensable part of peoples' life in the one side; while on the other side the service providers of the industry are continuously intensifying competition by innovative pricing strategy, new attractive schemes and Value-Added Services

(VAS) etc. The research concluded that the importance of the factors in MTSP selection in a proper sequence is service quality, brand image, service charge and network quality.

Another study was conducted by Simsim (2009) in Makkah, Saudi Arabia, where it was found that financial aspect stands out as the most important factor for the consumers in choosing from the available offerings provided by the mobile service operators.

A similar study was conducted by in Bangladesh context (Hasan et al., 2013) where the authors suggested that emphasis should be given on the lowest possible price, strong network coverage and faster internet service to attract and retain the customers. In the similar vein, the study conducted in India by Kumar et al. (2011) termed service quality as an important dimension in retaining the consumers. Besides, the study done by Khan (2010) in Pakistan emphasized that providing promised service timely, accurately, and dependably should be given the highest priority.

In a study using factor analysis done in India (Paulrajan et al., 2011) revealed that communication and price are the key and influencing factors that motivate the customers to prefer their service provider. Another factor found is the relationship it has with the customer which is determined by the promptness of response to the complaints and how quickly it is resolved. Short message service was considered as important, mobile entertainment as moderately important and technology use as less important; call forwarding and call waiting attributes were not considered as important.

OBJECTIVES

Mobile telecommunication industry has become very complete in all over the world. Now-a-days consumers consider various factors before choosing a service operator. Only after searching, gathering and evaluating information on these factors they choose the subscription (Shah, 2012). The situation is same in Bangladesh. In this context, a survey was carried to gather information based on the customers liking and disliking and collected information was analyzed to find out the factors responsible for customers' preference towards a Mobile Telecommunication Service Provider (MTSP). So ultimately the general objective of this research is to provide an overview of the different aspects relating to Mobile Telecommunication Industry of Bangladesh. The specific objectives are as follow:

1. To analyze the demographic characteristics of the users.
2. To find out the factors those affect selection of a mobile operator.

3. To evaluate importance of the value added services (VAS) offered by different operators.
4. To giving some suggestions to specific operators.

METHODOLOGY

This section presents the research methodology that is employed to measure the consumers' expectations from MTPSs of Bangladesh by discussing population, Sampling Technique, Instrumentation of Measurement Items, Data Collection and Data Analysis.

As per the objective of this study which is trying to find out mobile telecommunication service users' opinions regarding their expectations, the sample unit would be the individual subscribers.

The procedure adopted for sampling was Non Probabilistic Quota Sampling. The quota was formed based on occupations. The numbers of respondents was restricted by seven categories of occupations: student, homemaker, business men, government jobholder, private jobholder, jobless, retired person. Sample size was 760.

The items used in the questionnaire were selected from variables used in relevant studies and from some interviews of subscribers. Quinn et al. (1987) conducted a study where they identified convenience, amusement, timeliness as some dominant factors. A study conducted by Kim et.al. (2004) for Korean mobile communication services, it was revealed that customer' satisfaction is strongly related to call quality, value-added services and customer support and these factors are very important while choosing an MTSP. Girish and Neeraj identified customer care services, call rates, promotion and availabilities as the most import factors (2007).

Data was collected from greater Dhaka. Some analyses were descriptive in nature, like: frequency, percent. Factor analysis was done to find out the factors affecting customers' selection of an MTSP using SPSS version 16.

BRIEF OVERVIEW OF MOBILE TELECOM INDUSTRY AND MOBILE TELECOMMUNICATION SERVICE PROVIDERS (MTSP) IN BANGLADESH

The industry started the journey when Bangladesh Telecom (Pvt) Limited (BTL) received permission to provide the service in 1989 as the first cellular operator. Later on in 1997, Gremeenphone, Aktel and Sheba were awarded licenses. In a

very short time Grameenphone became the market leader. The industry is experiencing massive growth. Factors contributing to this growth are: limited performance of fixed-line operators, considerable foreign direct investment (FDI), and lower prices driven by increased competition and economies of scale (Lane et al., 2007). The overview of individual operators is given below:

Pacific Bangladesh Telephone Ltd. (Citycell):

Citycell, the 1st mobile telecommunications company of Bangladesh, is the only CDMA network operator of the country. In 1989, Bangladesh Telecom Limited (BTL) got a license to operate in cellular, paging and other wireless communications network. In 1990, a joint venture was taken place between BTL and Hutchison Telecommunications (Bangladesh) Limited which was incorporated as Hutchison Bangladesh Telecom Limited (HBTL). In 1993, HBTL started its commercial operation in Dhaka. It was the first cellular operator in South Asia. In the last part of that year Pacific motors bought 50 % of BTL and as a result by 1996 HBTL was renamed as Pacific Bangladesh Telecom Limited (PBTL) which started business using the brand name `Citycell Digital` for marketing of their products. PBTL has been converted into a Public Limited Company with effect from 28 March, 2008. Now again shares have been redistributed among three partners: Pacific Motors Limited (31.43%), Far East Telecom Limited (23.57%), SingTel Asia Pacific Investments Pvt. Ltd (45%) (banglalink.com.bd, 2013).

Telenor Bangladesh Ltd. (Grameenphone):

Grameenphone, popularly known as GP, got its cellular mobile license in 1997. It is the largest mobile phone operator in the country. It is the joint venture of Telenor (a Norwegian multinational telecommunications company having 55.8 % share) and Grameen Telecom Corporation— a sister concern of Grameen Bank having 34.2 % share) (grameenphone.com, 2013).

Banglalink Digital Communications Limited (Banglalink):

It is the 2nd largest mobile phone operator in Bangladesh. The original company was Sheba Telecom (Pvt.) Limited which initially got license to operate only in the rural areas of 199 upazillas.

In 1997 it got GSM license and allowed to operate all over the country. It could start giving its full fledged service in the last part of 1997 as a Bangladesh-Malaysia joint venture Company using the brand name Sheba. Orascom Telecom Holdings (an Egyptian company) purchased 100 % shares of Sheba Telecom (Pvt.) Limited in September, 2004. After that in February, 2005 the company re-branded the service as Banglalink. Now banglalink digital communications

limited is fully owned by telecom ventures ltd. (previously orascom telecom ventures limited) of malta, which is a fully owned subsidiary of global telecom holding— formerly known as orascom telecom holding (banglalink.com.bd, 2013).

Robi Axiata Limited (Robi):

It was founded in 1997 and popularly known as Aktel. It is a joint venture between Axiata Group Berhad, Malaysia and NTT DOCOMO INC, Japan. On 28 March 2010, it was rebranded as 'Robi', a Bengali word which means 'sun' and from then the company is known as Robi Axiata Limited (Robi. 2013).

Airtel Bangladesh Ltd. (Airtel):

Formerly this operator was known as Warid Telecom (sister concern of Warid Telecom International LLC, an Abu Dhabi based consortium) that started its journey in December 2005, however in 2010 when Bharati Airtel bought its major shares (70%) the name was converted into Airtel (bd.airtel.com, 2013).

Teletalk Bangladesh Ltd. (Teletalk):

It is a Public Limited Company of Bangladesh Government. It was incorporated as GSM based state owned company in 26 December 2004. It is the introducer of 3G mobile phone service in Bangladesh (teletalk.com.bd, 2013).

The telecommunication industry in Bangladesh is experiencing an uprising market where operators are competing with all their weapons like unique services and facilities for customers to ensure a secured leading position. The market for telecommunication is predicted to be highly competitive with new multinational cellular services companies entering the Bangladeshi market. Bangladesh Bureau of Statistics (BBS) has recently given the information that total population of Bangladesh right now is 156.4 million (BBS, 2013). In 2013, out of the total population 33% belonged to the age group of 0-14 (indexmundi.com). It seems that children below 14 years are not considered as prospect of mobile phone operators. According to the information provided by BTRC, the total subscribers of mobile telecommunication as on April, 2014 is 115.627 million. All these figures indicate that maximum prospects have already been converted into actual consumers of mobile telecommunication service. So it is obvious that the industry has almost reached its mature stage. And the companies in the field are facing a tough fight while expanding resulting in their offering various Value Added Services (VAS) to attract the customers.

FINDINGS

This section presents the findings using statistical analysis. First demographic profile of the respondent is analyzed, which is followed by factor analysis to find out factors responsible to shape customers’ preference, in the last part importance of value added services (VAS) is judged.

Demographic Profile:

Figure 02: Demographic Profile of the Respondents

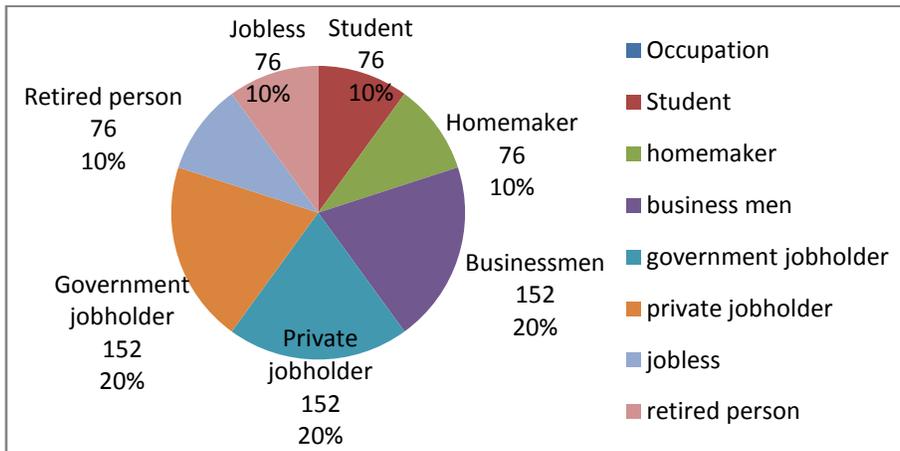
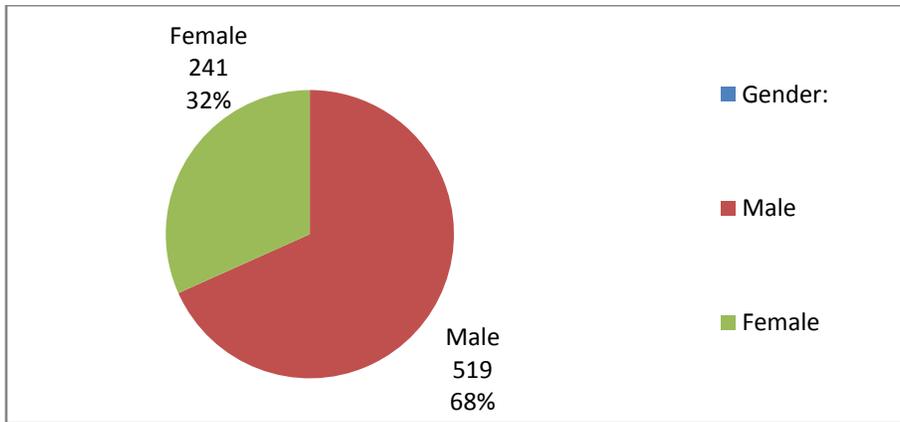


Table 02: Demographic Profile

	Frequency	Percent
Gender:		
Male	519	68.3
Female	241	31.7
Total	760	100.0
Occupation:		
Student	76	10%
homemaker	76	10%
business men	152	20%
government jobholder	152	20%
private jobholder	152	20%
jobless	76	10%
retired person	76	10%
Total	n = 760	100%

Out of the total respondents who were surveyed, 68 percent of them turned out to be male whereas the rest 32 percent were female. This vast difference is due to the number of respondents that were kept under each occupation.

The total respondents comprised of 76 students, 76 homemakers, 152 business men, 152 government jobholder, 152 private jobholder, 76 jobless and 76 retired persons. This different number of respondents under each occupation explains the difference in the number of male and female respondents.

Connection Preference:

Table 03: Consumers' Preference between Prepaid and Postpaid Offer

	Frequency	Percent
Prepaid	753	99.1
Postpaid	7	.9
Total	760	100.0

As we can see from the table, almost 100 per cent of the respondents turned out to be those who prefer prepaid connection over postpaid one. So it can be concluded that almost everyone prefers prepaid connection due to low maintenance costs. And this also shows the socio-economic condition of the people.

Factor Analysis:

In this section factor analysis was done to find out the factors effecting customers' preference.

The respondents assigned numbers ranging from 1 to 5 on various measurement items in the form of statements where 1 meant 'strongly disagree' and 5 meant 'strongly agree'. Factor analysis was done using SPSS version 16.

Table 04: KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.545
Bartlett's Test of Sphericity	Approx. Chi-Square	349.591
	Df	36
	Sig.	.000

The suitability of data for factor analysis depends on two measures: KMO index and Bartlett's test. To be a suitable data, a data need to have a KMO index with minimum value of 0.6 and the Bartlett's test for sphericity should be less than .05.

The data out here have KMO index value of .545 which close enough to 0.6, and the Bartlett's test for sphericity value is .000 which is less than .05.

Therefore, in this situation considering both the measurements the researcher decided to go for the Factor extraction.

Table 05: Total Variance Explained

Component	Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %
1	1.599	17.764	17.764
2	1.396	15.509	33.274

Extraction Method: Principal Component Analysis.

The total variance that was explained by Component 1 and 2 in all together was 33.274%.

Table 06: Rotated Component Matrix

	Component	
	1	2
	.652	
	.589	
	.543	
	.521	
	.420	
		.695
		.593
		.553
		.406

Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.

The threshold value of the loadings of the items constituting a factor has been taken 0.4 or above.

Component 1	Component 2
<ol style="list-style-type: none"> 1. People are conscious about the brand image of telecommunication companies 2. Consumer prefer a mobile connection having strong international roaming facilities 3. Everyone demands friendly customer care service. 4. whether I can buy the connection from nearest place is very much important to me 5. Advertisement can play a vital role to attract subscribers. 	<ol style="list-style-type: none"> 6. Connection fee is a big factor 7. Friend and family number facility is very important 8. Network should always be available in Bangladesh. 9. Lower call rate determines which connection to use.

Convenience in the service and attractiveness of the brand are the key elements that strongly connects the factors in Component 1

Service cost is the element that connects the factors of Component 2

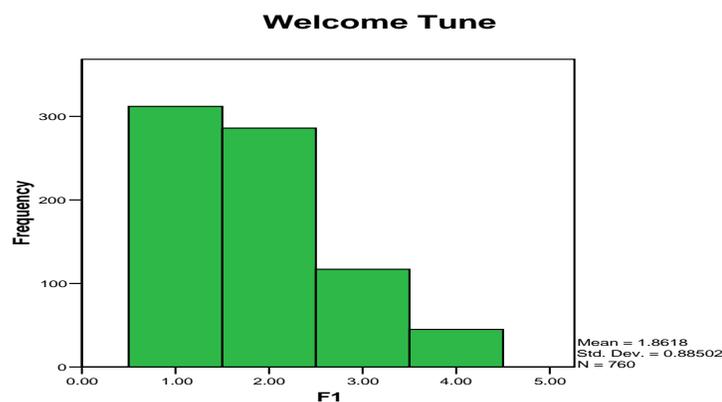
Therefore we can conclude that the marketer should take care of and differentiate their products by: **(a)** Service Cost, **(b)** Convenience in the service, and **(c)** Attractiveness of the brand

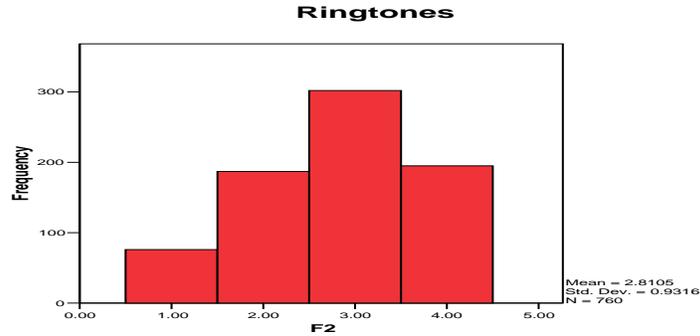
Importance of the Value Added Services (VAS):

In the last part of the survey the respondents were asked to give their opinion about the importance of the value **added** services (VAS) offered by various mobile telecommunication service providers (MTSPs).

Rating Scale: 1=not important at all, 2=Less Important, 3=Important, 4=Most Important

Figure 03: Importance of Welcome Tune and Ringtones to Customers

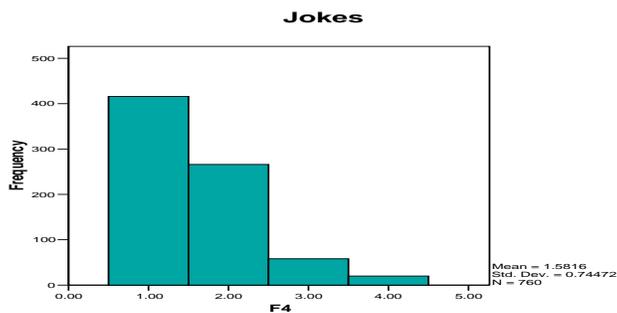
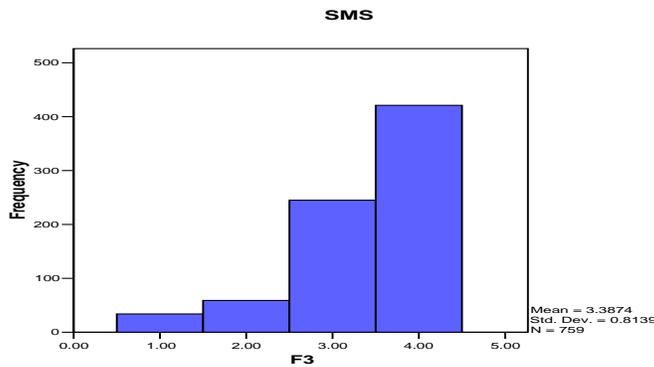




No matter how large a budget mobile operators have spent behind communicating about welcome tunes, the bad news for them is that, most of the people feel it is not important at all. Very few of the respondents felt that it is very important

Ring tones have fortunately been marked as an important feature of mobile phone and so, it is felt that, mobile connection operators should have more communication based on ring tones.

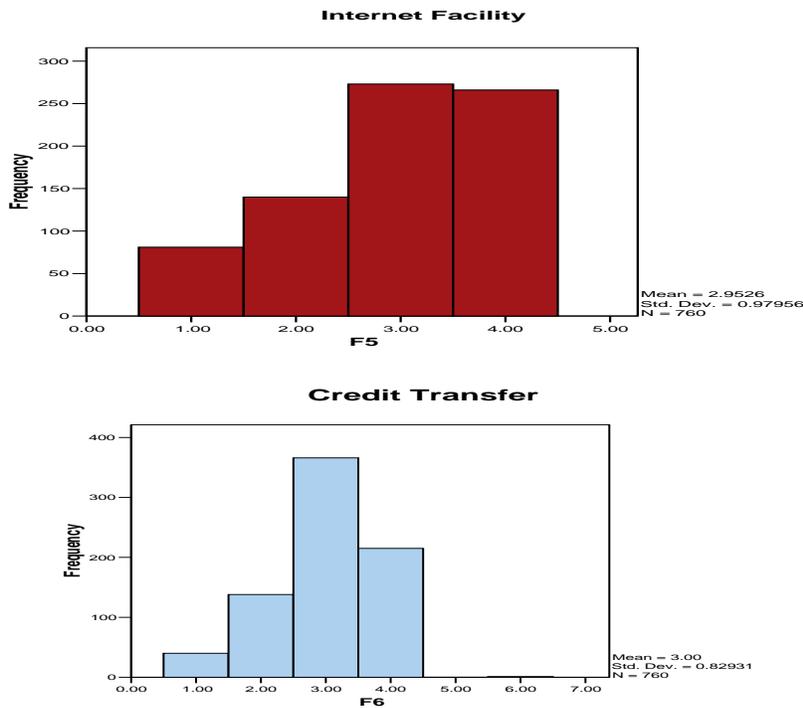
Figure 04: Significance of SMS and Jokes



SMS is rated as the most important feature of mobile phone.

Jokes are termed as most unimportant feature. People hardly bother about its existence.

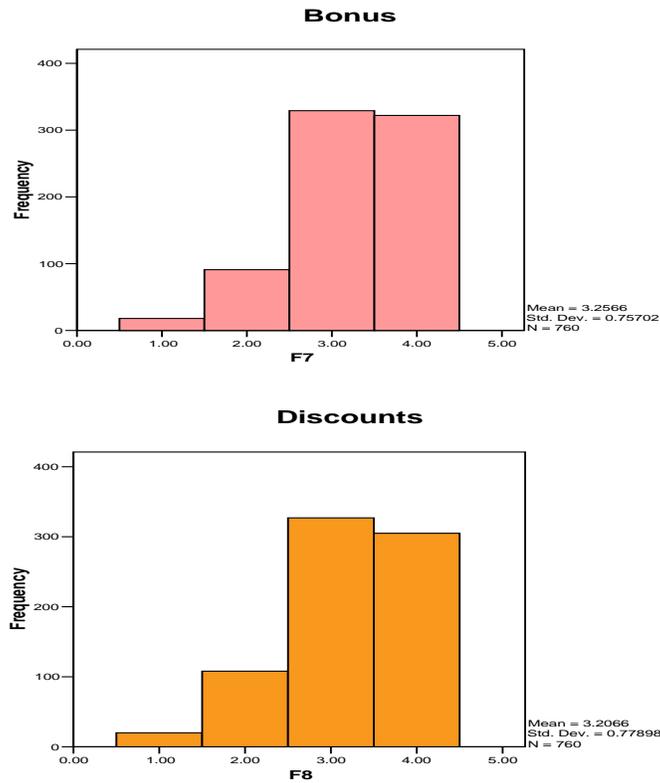
Figure 05: Importance of Internet Facility and Credit Transfer as Rated by Customers



Internet facility is felt by respondents as ranging from important to most important.

Nobody would want to transfer credit; rather he/she would prefer credit being transferred to his/her account. Still, credit transfer is termed as an important feature as because one party definitely enjoys its advantage.

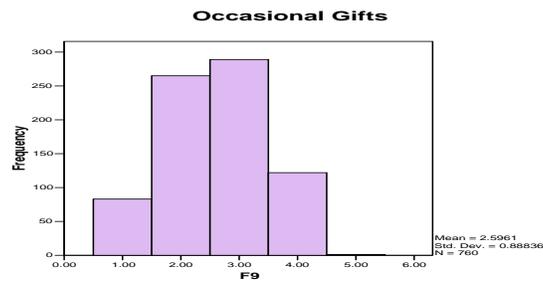
Figure 06: Significance of Bonus and Discounts to Customers

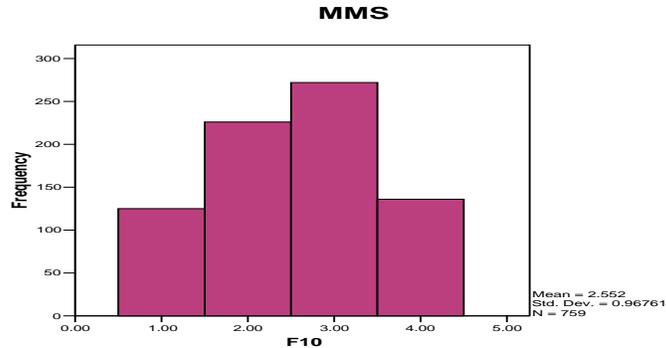


Bonus is termed as an important feature by most of the respondents. Because people would definitely want some monetary return on their usage.

Discounts are also termed as an important feature because people prefer to talk at lower rate.

Figure 07: Importance of Occasional Gifts and MMS





As long as people enjoy lower call rate and bonus talk time, occasional gifts do not have much significance. Respondents' choice ranged from not important to important.

Multi-media messaging service or MMS is also felt by respondents as important feature.

CONCLUSION AND RECOMMENDATIONS

The results from the survey are summarized in the following conclusion:

1. Consumers feel advertisements can act as great way of convince them to purchase the targeted connection. Now-a-days, people are becoming more conscious about the brand image and their loyalty towards the brand.
2. To the consumers, economical call rate is a very important factor. The importance of connection fee has somewhat contradictory responses, with most of the respondents stating that connection fee is not a big factor, while many of them disagreeing with such statement. People are also concerned about network availability. In this regard, international roaming facility has featured prominently.
3. Friendly customer care service is also crucial in strengthening the bond between the consumer and the company.
4. Convenience of getting the preferred SIM is an important factor in choosing mobile connection. Regardless of their occupation, or gender or monthly income, consumers feel more convenient with prepaid connection.
5. Welcome tunes, jokes etc. appear to be most unimportant, extravagant and useless features. On the other hand, SMS, MMS, discounts, bonus, and internet facility are very important feature for them and they think these are the ones that can influence them to a great extent in preferring a connection.

6. Some conclusions about the MTSPs are as follow: **(a)** Grameen Phone is the leading mobile phone company in Bangladesh in terms of active subscribers. It has the best network. **(b)** Banglalink, the 4th entrant in the industry, has experienced remarkable growth in the initial years of operation. Now it is in the second position. Its exclusive media exposure and coverage, wonderfully maintained public relation at the introductory stage has won millions of subscribers. Popularly known as 'creating the price war' Banglalink has revolutionized the call rate strategies. Banglalink has penetrated the market with extremely low rate that no other mobile companies ever thought of. **(c)** Robi which was formerly known as Aktel was the pioneer in introducing GPRS in Bangladesh. Robi is also the pioneer mobile company to launch insurance with its postpaid package. And also the first one to offer 5 FNF to any operator (for prepaid), and an included FNF to BTTB number for postpaid subscribers. But it lost its charm as being the first one by not communicating it strongly to the right people. Though Grameen Phone has started later, but people became more accustomed with it than with AKtel. AKtel's poor media planning and coverage as to be blamed for such a loss. Aktel which is now known as Robi is in the third position due to its long time in the industry, but when compared to Banglalink, which started way later than AKtel but has already got the second position in terms of active subscribers, then it must be concluded that Robi should perform with more vigour or else may even lose its position to Airtel which is in 4th position right now. **(d)** Airtel is in the 4th position. Initially its name was Warid which was the 6th entrant in mobile telecommunication market of Bangladesh. Warid was not doing well, as a result it was taken over by Bharati Airtel which bought its major shares in 2010 and converted the brand name to Airtel. **(e)** Teletalk, the government owned telecommunication service provider (MTSP) is in the 5th position. **(f)** Citycell, the first entrant and the only CDMA cellular service provider had a monopoly market in the beginning. But with the entrance of Grameen Phone, it had a drastic fall and has moved to no.6 position in terms of market share. But the average revenue earned per user in a week is noted the highest in Citycell.

After a thorough analysis and revision of the findings of the survey, some recommendations have been given that could be beneficial for mobile telecommunication service providers (MTSPs) for their sustainability in the industry.

The common recommendations are:

1. Advertisements can influence people to make choice on their purchase. So, the operators must make meaningful, convincing and instigating ads to make customers buy their connection.
2. Lower call rate is always a dominant reason for people's preference for a particular connection.
3. Relationship marketing is really important. Friendly customer care service is a must.
4. The mobile phone operators should work more on providing more dealers and franchise outlets to make their services more conveniently available.
5. Welcome tunes, jokes are factors not worth spending money on, as respondents have termed them as the least important features. So budget on communicating those features to customers should be cut down, and that money should be invested in features such as ring tones, SMS, MMS, internet, credit transfer, etc. Segmentation would be a handy tool at this particular point.
6. Customers always prefer some monetary return on their usage of the connection and by providing such facility; mobile phone companies can ensure the enhancement of relationship with the customers. Bonus and discounts are such features that are listed as top priority by the respondents.

The specific recommendations are:

1. To sustain in number one position, and to ensure that it maintains an increasing growth, rather than a stagnant one, Grammenphone has to lower its call rate and provide more facilities to acquire more customers, retain the existing ones, and switch other operators' customers towards it.
2. The strategy of creating a chaotic situation of decreasing price every day by Banglalink at the expense of network maintenance cannot be termed as a good strategy. Banglalink has to improve its network and also introduce other services that the leading mobile phone companies are providing. Because people now demand more with a package other than low price.
3. Robi, being the third largest mobile phone company in Bangladesh should work more on strengthening its strategy. To jump out of this image Robi has to promote itself properly to people as being the first company to launch GPRS and communicate through the right media having the greatest exposure. It should work on its point of differentiation more critically and exploit the advantage.

4. When Bharati Airtel bought major shares of Warid in 2010, it took a different strategy. It is not expending too much in advertising rather trying to give benefits to customers in terms of price considering the price sensitive market of Bangladesh. It is understandable that the strategy is working well. It has entered the riskiest stage and will need time to upheave itself and stand as a competitor for other companies that are already on strong footing. It must highlight its unique services as competitive advantage (e.g. more FNF, N-GEN technology, etc) more to the people and also expose its unique attributes to the target customer.
5. Teletalk is trying to introduce new package targeted towards the youth, because, the young segment feel rather out from the Teletalk domain. So, a big chunk can be enjoyed from the youth group by introducing a package for them. And in this attempt, it has introduced 3G mobile service for the first time in Bangladesh.
6. To gain more market share Citycell must communicate its services properly to the people and must always highlight its unique selling proposition properly. It must select the right media and provide better network, and other value added services to subscribers.

The various features provided by the 6 telecom companies– Grameen Phone, Banglalink, Airtel, Teletalk, Citycell and Robi– are very alluring and competitive. But the companies cannot just invest on such features because most of the people in Bangladesh are not the target consumers of such features. So, the companies should invest more on the telecom infrastructure to provide better network and reduce the call rate to make communication more convenient and economical. And at the same time the government should remove the SIM tax for all operators for ensuring a steady growth of the mobile industry in the country.

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