

# COMPARATIVE RESEARCH ON THE MARKETING STRATEGIES OF TELECOMMUNICATION INDUSTRY IN CHINA AND INDIA

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**Abstract:** This research is intended to compare the marketing strategies of telecommunication industry of India and China because telecommunication industry is vital for economic growth. It begins with analyzing and comparing their marketing environments. Then it compares the marketing strategies two ways: basic strategy and corporate strategy of the telecommunication industry. Through comparison, it reveals that niche market has been taken very seriously by the Indian telecommunication industry and they are focusing more and more on it but the Chinese telecom industry has not taken niche market so much seriously.

On the basis of Porter's Five Force Theory, the thesis analyzes corporate marketing strategy in the following ways: bargaining power of consumer, threats of new entrants, bargaining power of supplier, threats of substitute products and internal rivalry of telecommunication companies. It shows that two countries are different in marketing strategies mainly because government policies are different in two countries.

Keywords: Telecommunication, China, India, Marketing Strategy, Comparison

## INTRODUCTION

Telecommunications has a long and creative history. Beginning with the use of smoke signals, effective means of communication human being had used range from the use of sound by such things as drums and horns, to flags, lamps and special towers, and to the modern creation of telegraphs, radio, television and eventually the internet.

Nowadays telecommunication is a fascinating fast-growing industry that affects each and every aspect of our lives including simple voice telephone calls, access to the Internet, high speed data communications, satellite communications, surfing the World Wide Web, fax transmissions, video conferencing and cable television. India and China are on the top of the class when it comes to global telecom growth rates, with a total of 200 million subscribers in the first quarter of 2007, according to a UN report.

This research is carried out under three guiding hypotheses as follows:

**Hypothesis One:** India and China are two of the fastest growing economies of the world.

**Hypothesis Two:** Growth of telecommunication industry is vital for development and stability of any economies.

**Hypothesis Three:** Telecommunication industry of India and China are passing through the same stage and playing important role in the development of their economies.

## 1 RESEARCH METHODOLOGY

This study has used different qualitative methods to analyze the marketing methods of telecommunication industry in India and China.

### 1.1 Case Study Method

This case study method has been used as an analyzing tool to know the reason behind the current marketing methods prevailing in the industry. New marketing methods are being used by the different companies both in India and China. Therefore this research methodology will help understand the reason behind the new marketing methods brought in to the practice by the different companies in telecommunication industry.

### 1.2 Field Force Analysis

The field force analysis has been used in this study to know the factors which are supporting and which are opposing while implementing a particular marketing method in Indian and Chinese telecommunication industry.

### **1.3 Consumer Ethnocentrism**

This particular research methodology of consumer ethnocentrism has been used in this study to know the marketing methods prevailing in India and China regarding telecommunication industry because consumer ethnocentrism gives individuals an understanding of what purchases are acceptable to the in-group, as well as feelings of identity and belonging. For consumers who are not ethnocentric, or polycentric consumers, products are evaluated on their merits exclusive of national origin, or possibly even viewed more positively because they are foreign.

### **1.4 Comparative Analysis**

This particular research methodology has been used to compare the marketing methods of Indian and Chinese telecommunication industry on different factors like product, year, marketing environment.

### **1.5 Classical Categorization**

The research methodology is used in this study to compare the marketing methods that are being in practice for a particular product or service under the telecommunication industry of India and China.

## 2 MARKETING ENVIRONMENT COMPARISON

### 2.1 Comparison of Micro Environment:

	<b>India</b>	<b>China</b>	<b>Conclusion</b>
<b>Companies</b>	There is presence of government, private and foreign companies giving tough competition to each other.	There are few companies in which most of stakes are held by government. Competition is not so much.	Indian telecom market is much more competitive than Chinese Telecom market.
<b>Suppliers</b>	Indian telecom industry is totally depends upon foreign suppliers.	Chinese telecom industry have both domestic and foreign suppliers	Indian telecom industry is totally dependent on foreign suppliers but Chinese telecom industry is on the way of self sufficient mainly due to Huawei and ZTE.
<b>Intermediaries</b>	Intermediaries are playing important role in Indian telecom markets due to huge demand as well due to infancy of Indian companies.	Chinese telecom industry is not so much dependent on intermediaries as they have their own network of marketing and selling products.	Indian telecom industry is still infant and mainly focusing on their growth and left the sales and marketing on intermediaries but Chinese telecom industry is handling sales and marketing with them.
<b>Customers</b>	Indian telecom industry has all types of customer like end users, corporate customers and government.	Chinese telecom industry has all type of customer like end users, corporate customers, government and international.	Indian and Chinese telecom industry have almost same type of customer but Chinese telecom industry have edge of international customer.
<b>Competitors</b>	Indian telecom industry has three types of companies like government, Indian private and foreign companies so competition is so much high.	Chinese telecom industry is mainly dominated by those companies which are owned or in which majority of stake is held by government.	Indian telecom market is more competitive than Chinese telecom market.
<b>Publics</b>	Publics in Indian telecom industry consist of Government, consumer, media, and internal employee.	Chinese telecom industry have publics like domestic and international consumer, government and internal employee	Chinese telecom industry have international consumer as publics but Indian telecom industry has not any international publics as they has no business out side of India.

**Table 2-1: Comparison of micro environment**

### 2.2 Comparison of macro environment

	<b>India</b>	<b>China</b>	<b>Conclusion</b>
<b>Demography</b>	India has 747 million populations which can be targeted as consumer.	China's 70% population is between the age group of 15 – 64 which shows how much big market it is.	Demography is quite favorable for the growth of telecom industry in China and India.
<b>Economy</b>	India's GDP growth is 7.1%	China's GDP growth is 9%	The economy of India and

	for the fiscal year 2007-2008	for the fiscal year 2007-2008.	China is moving upward with healthy rate which is a good sign for the growth of telecom industry in their countries.
<b>Technology</b>	India is in the process of making its place in technology on the world level but telecom industry is still dependent on foreign suppliers for telecom equipments.	China has proven itself in technology at the world level and its telecom industry is becoming self dependent for equipment due to Huawei and ZTE.	China is ahead than India in the matter of technology and their telecom industry is more self dependent than Indian telecom industry for its equipment.
<b>Politics</b>	India have democratic political system in which election use to held after every five years which is mandatory under constitution but some time it held very frequently due to lack of majority by the ruling party.	China's political system is of one party system.	China's political system is stable which is very promising for economic growth in respect of India.
<b>Culture</b>	India's culture is not so much flexible and somehow resists the economic growth of the country and results in slower growth rate.	China's culture is flexible and matching with the pace of growth of economy and acting like a booster of growth.	China's culture is more favorable than Indian culture for economic growth.

**Table 2-2: Comparison of macro environment**

### 3 STRATEGY COMPARISONS

#### 3.1 Basic Strategies

##### 3.1.1 Market Expansion

###### (1) Sales Growth with Existing Products

Under this approach the companies in telecom industry try to increase the sales through the existing products that they are selling currently in the market. To do that, they are adopting the following three methods:

- i) Trying to sell more to existing customers.
- ii) Trying to get new customers.
- iii) Trying to sell the existing product in new market.

###### (2) Sales Growth with New Products

Under this approach the companies in telecom industry tries to increase the sales through introducing in new products. They generally apply this marketing strategy in the following ways:

- i) Introducing updated versions or refinements to existing products.
- ii) Introducing new products that are extension of current products.
- iii) Introducing new products not previously marketed.

##### 3.1.2 Market Share Growth

Under this strategy, Telecom companies look to increase their overall percentage or share of market. Generally they accomplish this strategy by taking sales away from competitors. Consequently, this strategy often relies on aggressive marketing tactics.

##### 3.1.3 Niche Market

Under this strategy, Telecom companies look to obtain a commanding position within a certain segment of the overall market. Usually the niche market is much smaller in terms of total customers and sales volume than the overall market. Ideally this strategy looks to have the product viewed as being different from companies targeting the larger market.

In this niche marketing process telecom companies try to find and serve profitable market segments and design custom-made products or services for them. For big companies those market segments are often too small in order to serve them profitably as these market segments often lack economies of scale. With this strategy, telecom companies are often reliant on the loyalty business model to maintain a profitable volume of sales.

### 3.1.4 Status Quo

Under this strategy, Telecom companies look to maintain their current position in the market, such as maintaining the same level of market share rather than giving competitive pressure on their rivals.

## 3.2 Corporate Strategy

The Comparison of corporate strategies of telecommunication industry in India and China has been based on the Porter's Five Force Analysis.

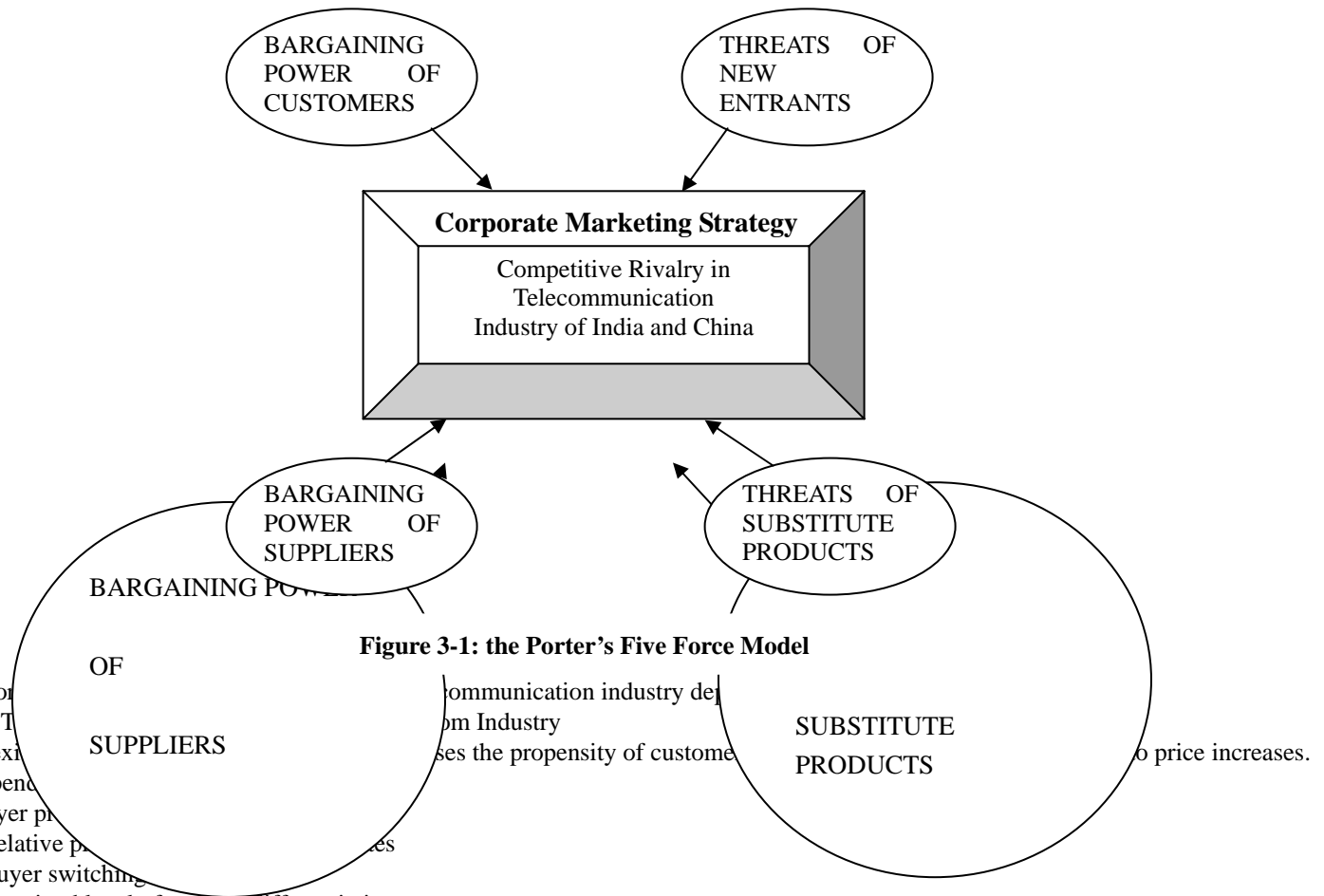


Figure 3-1: the Porter's Five Force Model

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i) Buyer p

ii). Relative p

iii) Buyer switching

iv) Perceived level of product differentiation.

3.2.2 The Threat of the Entry of New Competitors in Telecom Industry

Telecom industry is a Profitable Industry with high returns and obviously attract firms, which results in many new entrants, and effectively decreases profitability. Unless the entry of new firms can be blocked by incumbents, the profit rate will fall towards a

BARGAINING POWER OF SUPPLIERS

telecommunication industry decreases the propensity of customer

SUBSTITUTE PRODUCTS

price increases.

competitive level.

It depends upon the following:

- i) The existence of barriers to entry (patents, rights, etc.).
- ii) Economies of product differences.
- iii) Brand equity.
- iv) Switching costs or sunk costs.
- v) Capital requirements.
- vi) Access to distribution.
- vii) Absolute cost advantages.
- viii) Learning curve advantages.
- ix) Expected retaliation by Incumbents.
- x) Government Policies.

### 3.2.3 The Intensity of Competitive Rivalry in Telecom Industry

For Telecom industries in India and China, this is the major determinant of the competitiveness of the industry. Sometimes rivals compete aggressively and sometimes rivals compete in non-price dimensions such as innovation, marketing, etc.

It depends upon the following:

- i) Number of competitors.
- ii) Rate of industry growth.
- iii) Intermittent industry overcapacity.
- iv) Exit barriers.
- v) Diversity of competitors.
- vi) Informational complexity and asymmetry.
- vii) Fixed cost allocation per value added.
- viii) Level of advertising expense.
- ix) Sustainable competitive advantage through improvisation.

### 3.2.4 The Bargaining Power of Customers in Telecom Industry

It is also described as the market of outputs. It is the ability of customers to put the firm under pressure and it also affects the customer's sensitivity to price changes. In telecom industry it depends upon the following:

- i) Buyer concentration to firm concentration ratio.
- ii) Degree of dependency upon existing channels of distribution.
- iii) Bargaining leverage, particularly in industries with high fixed costs.
- iv) Buyer volume.
- v) Buyer switching costs relative to firm switching costs.
- vi) Buyer information availability.
- vii) Availability of existing substitutes products.
- viii) Buyer price sensitivity.
- ix) Differential advantage (uniqueness) of industry products.

### 3.2.5 The Bargaining Power of Suppliers in the Telecom Industry

It is also described as market of inputs. In Telecom industry suppliers of raw materials, components, labor, and services (such as expertise) to the firm can be a source of power over the firm. Suppliers may refuse to work with the firm, or e.g. charge excessively high prices for unique resources.

It depends upon the following:

- i) Supplier switching costs relative to firm switching costs.
- ii) Degree of differentiation of inputs.
- iii) Presence of substitute inputs.
- iv) Supplier concentration to firm concentration ratio.
- v) Employee solidarity (e.g. labor unions).
- vi) Threat of forward integration by suppliers relative to the threat of backward integration by firms.
- vii) Cost of inputs relative to selling price of the product.

## 4 COMPARISONS AND SUGGESTION OF BASIC STRATEGY

### 4.1 Market Expansion

<b>Market Expansion Strategy</b>
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<u>Sales Growth with Existing Product</u> - This strategy is being in use in both countries			<u>Sales Growth with New Products</u> - This strategy is being used in both countries.		
Suggestion			Suggestion		
<b>India</b>	Tele density is only 21% but in China it is more than 40%	Telecom companies should make new market strategy to tap the remaining market which is not covered yet.	<b>India</b>	Most of the mobile users are unable to use value added services due to costly mobile set.	Need of reduction in price of handset so that more value added services will be used by customer and will result in more profit.
<b>China</b>	Chinese users use 303 mins. Per month in respect of 463 mins. In India.	There is need of reduction in tariff so that the user will talk more which will result in more profit.	<b>China</b>	3G has been just launched but it is very costly and not well marketed yet.	Lowering the price and well marketing is needed for 3G to increase the profit.

**Table 4-1: Comparison of Market Expansion and Suggestion:**

## 4.2 Market Share Growth

<b>Market Share Growth Strategy</b>		
	Indian Telecommunication Industry	Chinese Telecommunication Industry
Strategy	<ol style="list-style-type: none"> <li>1. Aggressive advertisements.</li> <li>2. Price war.</li> <li>3. Reaching consumer via media and personally.</li> <li>4. Providing more and more value added services at aggressive price.</li> <li>5. Entering into each other's dominance area through aggressive marketing.</li> <li>6. Giving more option in a single product like CDMA mobile phone with internet connectivity or Fixed Line phone with limited mobile facility and internet connection.</li> </ol>	<ol style="list-style-type: none"> <li>1. Aggressive advertisements.</li> <li>2. Reaching consumer via media and personally.</li> <li>3. Providing more and more value added services at aggressive price.</li> <li>4. Entering into each other's dominance area through aggressive advertisement.</li> </ol>
Suggestion	<ol style="list-style-type: none"> <li>1. Must try to pass the benefit to consumers if any provided by the government like reduction in tax or surcharge etc.,</li> <li>2. Should negotiate with suppliers for low price and to reduce the fixed cost and pass this benefit to consumer for large base.</li> </ol>	<ol style="list-style-type: none"> <li>1. Need of aggressive price policy especially by China Unicom to reduce the monopoly of China Mobile and China telecom in mobile and internet sector. It can be done through by negotiating the price with suppliers providing equipment or value added services.</li> <li>2. Any benefit provided by the government should be transferred to the Consumer as low product price.</li> </ol>

**Table 4-2: Comparison of Market Share Growth Strategy and Suggestion**

## 4.3 Niche Market

<b>Niche Market Strategy</b>	
	Chinese Telecommunication Industry
Strategy	<p>Indian telecommunication Industry</p> <p>Indian telecom companies have taken niche market very seriously and the competition is very tough in this segment. For telecom companies even the group of two consumers is niche market and they are aggressively marketing in this sector. Indian niche market starts from as small as two consumers to as</p> <p>The Niche market is on the target of telecom companies but it has been not so much taken seriously by the telecom companies. Chinese telecom Industry is still targeting large organization as a niche market rather than small group consist of few customers.</p>

	big as an organization.	
Suggestion	Almost all the aspects of Niche market have been harvested by the telecom companies of India. Still they can try to find out more niche market in rural India where tele density is still low.	There is need of creating the new definition of niche market by the telecom industry of China rather than working on traditional way considering only big organization as a niche market.

**Table 4-3: Comparison of Niche market strategy and suggestion**

#### 4.4 Status Quo Strategy

<b>Status Quo Strategy</b>		
	<b>Indian Telecommunication Industry</b>	<b>Chinese Telecommunication Industry</b>
Strategy	This strategy is maintained by the fixed telephone line service provider companies because in India more and consumer started to prefer mobile service rather than fixed line telephone due to mobility and fashion. So there is downward movement in this particular segment.	Presently not a single company is practicing this strategy as the users are increasing every year in every segment whether it is a fixed line service or mobile service or internet service. There is upward movement in every sector.
Suggestion	There is need of price cut in this segment through tax benefit provided by government or by reducing the profit margin. Need of providing other benefits with this service like rental free or combo offer like internet with fixed telephone line at low cost or providing long range cordless telephone set so that people can use it like mobile phone in a certain area.	There is no certain suggestion but every sector has to look closely the other sector which can be substitute of their product and service and keep improving them.

**Table 4-4: Comparison of Status Quo strategy and suggestion**

## 5 COMPARISONS AND SUGGESTION OF CORPORATE STRATEGY

### 5.1 The Threats of Substitute Products in Telecom Industry

<b>Strategy of Tackling Threats of Substitute Products in Telecom Industry</b>	
<b>Indian Telecom Industry</b>	<b>Chinese Telecom Industry</b>
<ol style="list-style-type: none"> <li>1. Product innovation at regular basis.</li> <li>2. Providing Value added services.</li> <li>3. Keeping price according to market level.</li> <li>4. Pressurizing government to make the policies unfavorable to the substitute product.</li> <li>5. Providing the facility of substitute product in the current product or service range. For example. To tackle the threat the GSM mobile service the CDMA mobile Service provider have started to provide the additional GSM service in the same set.</li> <li>6. Negotiation with suppliers for high quality service or raw materials.</li> </ol>	<ol style="list-style-type: none"> <li>1. Product innovation at regular basis.</li> <li>2. Providing value added services.</li> <li>3. Keeping the price at market level.</li> <li>4. Negotiation with supplier for high quality service and raw materials.</li> </ol>
<b>Suggestion</b>	
<ol style="list-style-type: none"> <li>1. Indian telecom companies should invest more in self Research &amp; Development activity rather than depending upon foreign suppliers to tackling the threats of substitute.</li> </ol>	<ol style="list-style-type: none"> <li>1. CDMA mobile service provider have to also provide GSM service in the same mobile phone set to tackle the GSM demand as well as maintaining its own sales target.</li> </ol>



	2. Keeping the telecom equipment supplier like Huawei and ZTE up to date to tackle any substitution through investing more in Research & Development.
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**Table 5-1: Strategy of tackling threats of substitute products in telecom industry and suggestion**

## 5.2 The Threat of the Entry of New Competitors in Telecom Industry

<b>Strategy of Tackling New Competitors in Telecom Industry</b>	
<u>Indian Telecom Industry</u>	<u>Chinese Telecom Industry</u>
1. Reducing the product and service price. 2. New advertisement campaign. 3. Pressurizing the government to make the policy tough for new competitors. 4. New offer for current customer in terms of price and service.	1. Reducing the product and service price. 2. New advertisement campaign. 3. Pressurizing the government to make the policy tough for new competitors. 4. New offer for current customer in terms of price and service.
Suggestion	
Since tele density is still around 21% therefore telecom companies have to try to those market which is still untapped by the other telecom companies. Keep their technology up to date so that they should always offer something new to their existing customer and also new customer. Should provide better customer service through better customer relation so that old customer doesn't left.	Since tele density is still around 21% therefore telecom companies have to turn to those market which is still untapped by the other telecom companies. Keep their technology up to date so that they should always offer something new to their existing customer and also new customer. Should provide better customer service through better customer relation so that old customer doesn't left.

**Table 5-2: Strategy of tackling threats of new competitor in telecom industry and suggestion**

## 5.3 The Intensity of Competitive Rivalry in Telecom Industry

<b>Strategy to Tackle the Intensity of Competitive Rivalry</b>	
<u>Indian Telecom industry</u>	<u>Chinese Telecom Industry</u>
1. Always expanding the product and service range. 2. New ways of advertising. 3. Always enhancing the customer service. 4. Entry in new market segment as well as new geographical area. 5. Keeping the price of product and service according to demand and needs of different section of the society. 6. Always providing something new and extra in terms of product and service.	1. Always expanding the product and service range. 2. New ways of Advertising. 3. Always enhancing the customer service. 4. Entry in new market segment as well as new geographical area. 5. Keeping the price of product and service according to demand and needs of different section of the society. 6. Always providing something new and extra in terms of product and service.
Suggestion	
Should focus more on new rural area where tele density is very low and competition is less. Make strategic alliance with equipment supplier so that become a market leader in the terms of technology.	Should reduce the price of current service and product. Should try to find out the new market in terms of geographical area as well as segment. Should focus more on niche market. Make strategic alliance with equipment supplier so that become a market leader in the terms of technology.

**Table 5-3: Comparison of strategy to tackle the intensity of competition in telecom industry and suggestion.**

## 5.4 The Bargaining Power of Customers in Telecom Industry

<b>Strategy of Tackling the Bargaining Power of Customer</b>	
<u>Indian Telecom Industry</u>	<u>Chinese Telecom Industry</u>
1. Keeping the price according to market level. 2. Providing the highest quality of service. 3. Providing best customer service. 4. Providing value added services at competitive price. 5. Providing up to date technology. 6. Providing wide range of product and services.	1. Keeping the price according to market level. 2. Providing the highest quality of service. 3. Providing best customer service. 4. Providing value added services at competitive price. 5. Providing up to date technology. 6. Providing wide range of product and services. 7. Less dependent on intermediaries to sell their products and services.
Suggestions	
Keep the price lowest in market. Actively participate in research and development activities to offer new technology. Try to maintain the uniqueness of product as long as possible. Try to be market leader in product and service range offerings. Try to eliminate the intermediaries involved in providing products and services to reduce the cost.	Actively participate in research and development activities to offer new technology. Try to maintain the uniqueness of product as long as possible. Try to be market leader in product and service range offerings.

**Table 5-4: Strategy to Tackle Bargaining Power of Customer in Telecom Industry and suggestion.**

### 5.5 The Bargaining Power of Suppliers in Telecom Industry

<b>Strategy of Tackling Bargaining Power of Suppliers</b>	
<u>Indian Telecom Industry</u>	<u>Chinese Telecom Industry</u>
1. Indian Telecom companies negotiate with 4-5 suppliers at the same time for the same contract so that to keep the psychological pressure and also give the message that they have so many options. 2. Always make sensation in media about new project or new requirements so that more and more supplier comes to offer and they can easily bargain with the supplier.	1. Chinese telecom industry has both option of supplier, like domestic supplier and foreign supplier so they easily bargain in terms availability of options.
Suggestion	
Indian telecom industry should make alliance with foreign supplier and invest jointly in Research & Development activity.	Chinese telecom industry has to support their domestic supplier like Huawei and ZTE so that they can offer world class raw material as well as up to date technology.

**Table 5-5: Comparison of strategy to tackle bargaining power of suppliers in telecom industry and suggestion.**

## 6 CONCLUSIONS

China and India, whose population together totals up to 2.5 billion, are today the engines of growth in the midst of rapid economic transformation in the global economy. In fact, they are major factors driving the shift of the global economic focus towards Asia.

This study finds that as far as telecommunication industry is concerned, it is playing a major role in this rapid economic development of both the countries and will continue in future. Although Indian and Chinese telecom industry has been growing for so many years but the opportunity is still very large as tele density is still around 20 and 40 percent in India and China.

This study also concludes that there is basic difference between the Indian and Chinese telecommunication industry especially in the structure. Indian telecom industry includes players like Indian companies, foreign companies and government companies but Chinese telecom industry includes only domestic players in service providing but having domestic as well as foreign players of telecom equipment supply.

One interesting thing as far as role of intermediaries is concerned in telecom industry is that Indian telecom almost depends upon intermediaries for their service selling but it is not the same situation with Chinese telecom industry who are very less dependent on intermediaries for their service selling rather they are doing this activity by themselves.

This study clearly concludes that Chinese telecom companies are not so much concerned with retention of customers as they are enjoying monopoly in their respective field but it is not the same case with Indian telecom companies as the competition is very tough and customer retention is main attention for each company.

In making corporate marketing strategy on the one hand Chinese telecom companies are enjoying the benefits of policies of government in service providing sector as they are free of fear of foreign competitors but telecom industry of India do not enjoy such benefits as the Foreign Direct Investment limit is 74% in telecommunication sector. India also don't have support of domestic telecom equipment supply companies as all the supplier are foreign companies but the Chinese telecom industry have support of their domestic companies like Huawei and ZTE which are supplying telecom equipment.

In the last this study concludes that there are quite similarities as well as dissimilarities in the marketing methods of Indian and Chinese telecom industry and it is mainly due to different marketing environment and policy regarding telecom sector available in both countries.

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