Tampere University of Applied Sciences

# Market penetration of telecommunication EMNCs in Africa: The case of Viettel Global in Mozambique

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**ABSTRACT**

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This thesis project investigates the entry strategies utilised by emerging market multinational companies (EMNCs) operating in the telecommunications sector to penetrate African markets. The study adopts a case study methodology, focusing on the subsidiary of Viettel Global, known as Movitel, in Mozambique. The research aims to analyse the specific strategies employed by Movitel to successfully enter the African market and expand its operations. By examining the experiences and practises of Movitel, this study contributes to the existing literature on EMNCs, entry strategies in emerging markets, particularly in the telecommunications sector in Africa.

The research examines the factors that contribute to the rapid market share gain of emerging market multinational corporations (EMNCs) in the African telecom market. Through secondary data sources analysis, it is determined that strategic market selection, local partnerships, infrastructure investments, recruitment and training, competitive pricing, targeted promotions, and performance tracking play a crucial role in this process.

Although this dissertation offers significant practical insights, it is important to acknowledge its limitations. These include the absence of primary data and inherent subjectivity of thematic analysis. Additional research that integrates interviews, alternative analytical methodologies, and multiple market perspectives would enhance comprehension regarding the process by which EMNCs effectively internationalise and localise their strategies in emerging economies.

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Key words: telecommunication, emerging markets, international, market penetration

**CONTENTS**

## ABBREVIATIONS AND TERMS

| | |
|---|---|
| EMNCs | Emerging Multinational Corporations |
| MNC | Multinational Corporations |
| VTG | Viettel Global |

# 1 INTRODUCTION

## 1.1. Background

The African telecommunications market represents a major growth opportunity as mobile penetration and internet utilisation continue to increase rapidly. The industry is ready for more growth as 4G networks become more widespread and 5G technologies develop. GSMA's report (2023) indicates that in 2022, there were a mere 287 million mobile internet users, accounting for around 25% of the population. However, by 2030, this figure is projected to rise to 438 million, which would represent over 32% of the population. This suggests that there is significant untapped potential as network coverage continues to expand.

However, there are ongoing developmental obstacles that constrain that growth. Telecom multinational corporations (MNCs) may find it difficult to foster innovation and attain economies of scale in Africa due to the inconsistencies of regulations governing infrastructure sharing, roaming, licencing, and spectrum allocation (Neto, 2005). According to Paelo (2020), such inconsistencies' impact on competition, prices, access, and innovation in telecom services is evident in South Africa, Tanzania, Zambia, and Zimbabwe. Other major drawbacks that might discourage MNCs include: limited reliable fixed-line broadband infrastructure across the continent compared to global standards (Foster and Steinbuks, 2009), financial limitations impede infrastructure expansion, particularly when it comes to extending networks to rural and underserved regions (GSMA, 2019), political and economic instability and natural disasters.

Major Western MNCs have a notable presence in Africa (e.g., Vodafone, Orange, and MTN International) – they leverage their worldwide networks, economies of scale, and high brand recognition to establish early dominance (Alden and Davies, 2006). However, these companies encountered difficulties when adapting business models to specific condition of the continent such as low-income consumer segments (Neuland and Hough, 2010). On the contrary, as emphasised by Cuervo-Cazurra and Genç (2008), MNCs from emerging countries (EMNCs) have localised strategic advantages over their Western peers, due to their shared identities and experience in developing markets – allowing a deeper understanding of African consumers' needs and preferences. In the 1990s, South Africa's MTN Group, India's Bharti Airtel, and Mexico's America Movil were among the first EMNCs to enter the African telecom market. Recently, new waves of EMNCs from Asia and other emerging regions, including Axiata of Malaysia and Viettel Global of Vietnam, have entered the fray. These companies, which were frequently early entrants to the global market, have capitalised on their position by expanding internationally in order to obtain resources and overcome institutional and market limitations (Luo, 2007) through capabilities leveraged from dynamic home telecom sectors and innovation ecosystems (Satta, Parola and Persico, 2014).

# 2 THESIS PLAN

## 2.1. Thesis topic

The African telecommunication market, with its unique challenges and untapped potential, has gaining attention from many EMNCs. A review of the academic literature found that despite the increasing interest, there are few studies investigating EMNCs' experience in navigating various institutional settings and balancing capacities transfer with local responsiveness. Current studies mostly concentrate on general international expansion strategies (Cuervo-Cazurra and Genç, 2008). However, studies on industry-specific and region-specific strategies in the context of African telecommunication market remain limited.

Thus, the topic of this thesis is to address this gap by performing a comprehensive case study of a Vietnamese EMNC (Viettel Global- hereby referred to as VTG) and its subsidiary Movitel S.A (Movitel) in Mozambique, with an emphasis on their market entrance and expansion plans. The case was chosen based on its relevance and the author's ability to get the critical secondary data (mainly in Vietnamese - the author's native language). The findings will offer practical insights that could advance understanding of how latecomer EMNCs can overcome internal and external constraints to access new growth opportunities in emerging markets, particularly in the telecommunication sector.

## 2.2. Thesis objectives and research questions

The objective of this study is to understand the mechanisms behind the strategies used by Viettel Global to penetrate the African telecommunication market, offering new perspectives on an exemplar EMNC's competitive positioning, institutional alignment within the Mozambican market contexts. Based on the objective, the main research question is developed:

*"How do telecom EMNCs penetrate in African telecommunication markets?"*

To answer the main question, the following sub-questions are identified.

- Q1: What is the business strategy of EMNCs, particularly Viettel in establishing and operating its subsidiary in an African country?
- Q2: How has Viettel navigated the institutional environment in Mozambique, and what challenges and opportunities has it encountered in this process?
- Q3: What unique capabilities and resources has Viettel leveraged to gain a competitive advantage edge in Mozambique?

# 3 LITERATURE REVIEW

This chapter aims to enhance the comprehension of the academic background regarding emerging countries' multinational corporations' (EMNCs') expansion strategies into African telecom markets. It begins by exploring the motivations for EMNCs to venture globally, then examines the key conceptual issues surrounding market penetration, setting the stage for a detailed examination of the strategies adopted by Viettel Global (VTG), a prominent Vietnamese telecom EMNC. The literature review intends to identify the existing knowledge and any gaps that still need to be addressed, serving as a framework for the research approach.

## 3.1. Motivation of EMNCs

EMNCs refer to companies originating from developing countries that undertake foreign direct investment while owning value-added operations on an international scale (Cuervo-Cazurra, 2012). Luo and Tung (2007) argue that the emergence of such firms represents a transformational shift in the global competitive landscape. The foreign expansion of EMNCs has accelerated rapidly, now they represent 25% of the top 100 MNCs worldwide, a substantial increase from just 4% in 2000 (Atalay et al., 2022).

There are a number of factors that work together to speed up the growth of EMNCs. Some scholars believe those factors to be: home countries' policies promoting global expansion, saturated domestic markets, and ambitions to become major players (Luo and Tung, 2007; Ramamurti, 2012). Others think that EMNCs internationalise to get cutting-edge technology, brands, resources, and strategic assets that may be lacking in their country (Mathews, 2006; Hennart, 2012). Also, globalization has granted EMNCs access to the capital and expertise of developed nations, which has facilitated their expansion abroad (Cuervo-Cazurra and Genç, 2008).

Significant advantages held by EMNCs enable them to internationalise rapidly, whereas it would have taken established country MNCs decades to do so. Mathews (2006) argues that EMNCs effectively exploit latecomer advantages in low-cost innovation, manufacturing, and accelerated learning by utilising linkage-leverage-learning frameworks. Furthermore, such firms are able to transmit business models and capitalise on home-country relationships with greater ease due to their shared identity with other developing nations (Cuervo-Cazurra, 2012).

### 3.2. Theoretical considerations of telecom MNC's expansion

With globalization intensifying, telecom MNCs in the local market may struggle to increase market share due to fewer clients and more domestic and international competitors. Key theoretical considerations of a telecom MNCs' international market penetration strategy include long-term perspectives that direct activities towards the achievement of business objectives via strategic marketing solutions. This includes infrastructure investment, promotion, and implementation concerns with a strategic orientation towards the global expansion of telecom products and services. Van Dinh, 2018 compiled previous studies' views and proposed a model for the "Decisions of a telecom company for market penetration" (see figure 1)

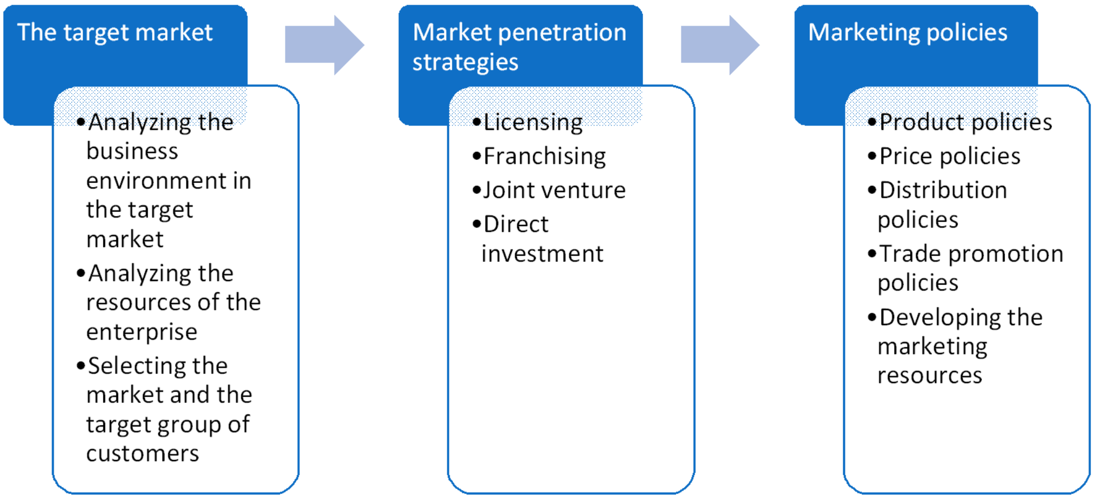


FIGURE 1. Decisions of a telecom company for market penetration (Van Dinh, 2018)

#### 3.2.1 Determine the target market in African telecom sector.

Target market selection for telecom multinationals is a critical strategic decision that requires evaluating various factors such as market segment attractiveness, profitability, and competitive analysis (Malhotra, Sivakumar and Zhu, 2009; Aghdaie and Alimardani, 2015). Africa represents a high-growth market opportunity for multinational telecom firms, with an expanding customer base, increasing mobile penetration, and favourable demographics (Gustafsson & Joumard, 2021). AFR-IX telecom (2021), an African internet and data service provider, projects that the Sub-Saharan Africa mobile phone market will expand at a 4.6% annual rate between 2019 and 2025, compared to a global growth rate of only 3%. This corresponds to an approximate 167 million increase in the number of distinct mobile users by 2025, from 456 million at the conclusion of 2018 to 623 million (AFR-IX telecom, 2021), and by 2030, this number is projected to reach 692 million (GSMA, 2023). The increase is propelled by advantageous demographics, since more than 60% of Africa's population consists of individuals under the age of 25 (Weny, Snow and Zhang, 2017). The swift uptake can be attributed to the transition from conventional wireline infrastructure to mobile networks. Sector development is hindered, however, by market obstacles such as insufficient fixed-line broadband, inconsistent 3G/4G access, financing gaps, and institutional weaknesses (Foster & Steinbuks, 2009).

On the other hand, cultural, administrative, geographic, and economic distances between the MNC and the target market should be factored into the selection process (Arenius, 2005; Weinstein, 2014; Van Dinh, 2018). According to Van Dinh (2018), the performance of a telecom MNC in a foreign market is directly influenced by the cultural environment, which also affects marketing policies. Cultural similarities between the home and host countries enable the MNC to offer products and services that require only minor adjustments, thereby facilitating consumption. The greater the degree of cultural similarity between markets, the greater the likelihood of achieving business success and implementing effective marketing strategies.

To begin with, African culture promotes the value of reciprocity, placing a high priority on the long-term relationships, win-win outcomes, and mutual exchange (Eko, 2001; Bosson, Boolaky and Gungaphul, 2016). Additionally, in the context of African culture, age is a significant factor in the selection process for negotiation assignments and the employment of sales and managerial personnel. In line with this cultural emphasis on respect, brand messages ought to prioritize an individual's need for belongingness over achievement (Smith, 2010).

Last but not least, telecom MNCs should also consider the natural environment of the African continent. This is because natural elements have a direct impact on numerous input resources that are essential for the production, operation, and consumption of telecommunications services (Van Dinh, 2018). It is the system of natural factors that affect many aspects of input resources needed for production, business, and the consumption of output of an enterprise. The deployment of good telecommunications infrastructure depends heavily on natural conditions. Therefore, enterprises cannot ignore the effects of natural factor.

### 3.2.2 Choosing the market penetration method(s) and strategies

It is important for telecom MNCs to choose the best method(s) to most appropriate approach(es) to join, taking into account their evaluation of the overall strategy and marketing tactics. The method(s) to enter the chosen market must also be consistent with the company’s overall strategy, objectives, and duration of each objective. An optimal option is to harmonize costs, risks, and the control factor. Direct entry (such as through a branch or subsidiary), although associated with high start-up costs, has full control over marketing activities such as promotions and sales. Indirect entry poses low risks, but the company cannot set the price of products directly to consumers or provide after-sales services to customers. The method(s) of entry will be based on the above-analysed factors. In reality, experienced telecom enterprises usually choose to invest directly by establishing subsidiaries or creating joint ventures with local enterprises because of the nature of this industry.

*Joint venture*, which involve the establishment of a jointly owned and managed company by local and foreign partners, are frequently employed as a means of expanding into untapped international markets (Zhang and Li, 2020). Foreign investors can purchase a portion of a license-owned company, or a license-owned company can purchase a portion of a foreign company, or both parties can contribute to the establishment of a new joint venture enterprise. According to Liu and Maula (2016), joint ventures allow firms to optimally combine resources and reduce uncertainty when entering foreign markets. They can be a strategic option for implementing changes in strategic positioning or defending against strong competition or be used for large-scale international investment projects to protect participants' economic interests against adverse actions of a host state (Finnerty, Owers and Rogers, 1986). However, this entry mode is not without limits. Kabiraj and Sengupta (2018)'s theory indicates that international joint ventures suffer from high level of instability, due to potential opportunism, autonomy, tacit knowledge, and behaviour of the parent company. The partners may have disagreements about basic capital, marketing, and other operating principles. The chances of terminating a joint venture increase over time, particularly through dissolution of the firm and acquisition by the foreign partner (Cheng, 2013).

*Direct investment* is one popular tactic for entering overseas markets, in which an MNC completely controls a foreign subsidiary (Mudambi, 2008). For resource-rich companies, such as telecom MNCs with significant foreign trading expertise, this strategy is especially relevant. Similar to joint ventures, direct investment can enhance market access and lessen tariff barriers and quotas (Brouthers & Hennart, 2007). It also reduces the risk of losing control and technology theft – an important factor in tech-heavy industries like telecom. Furthermore, direct investment allows MNCs to maintain tight control over its global operations, improving coordination, economies of scale, positional advantages, and leveraging experience, all of which contribute to a company's ability to compete in a variety of markets (Slangen & Hennart, 2008). Direct investment, in compared with joint ventures, may speed up market expansion, give more control over business growth, and possibly result in higher profitability (Brouthers & Hennart, 2007) However, it is important to note that this strategy frequently incurs large costs and hazards because the parent business is fully responsible for creating and operating international subsidiaries.

According to Cissé (2013), joint ventures and foreign direct investment in the African telecom market have been driven by various factors such as the quest for natural resources, modernisation, and urbanisation. However, it is worth noting that there is a lack of research attention directed towards these particular entry modes in the telecom sector of Africa. The existing studies predominantly revolve around South-African or Chinese joint ventures and direct investments in Africa, such as MTN, ZTE and Huawei.

### 3.2.3 Planning marketing policies with 4Ps marketing mix

Depending on the approach to the mode of entry, firms have their own way of planning marketing policies and conducting their marketing mix to bring their telecom products/ services on sale. The goal of marketing policies is to ensure that the company is able to penetrate the target market, sell products/services, earn profits and gain competitive advantages. This study takes a look at previous research's understanding of the marketing mix employed by MNCs in the African telecom market to see what were undertaken by such firms to impact their customer in new countries, enhance loyalty and market performance. The author would use 4P model proposed by Kotler (2002), regarding telecom MNCs' Product, Price, Promotion and Place policies.

***Product policy***

The product offering is a key element in the marketing mix of MNCs in the African telecom market, crucial for determining how services will be sold to consumers (Jahanbakht and Mostafa, 2020). In early stages, Western MNCs targeted high-income segments before shifting to serve the masses. Over time, with increased competition, prices for basic services like calling and internet have reduced. Thus, MNCs have diversified their product portfolios to meet consumer demand for telecom services. For example, MNCs like Safaricom, Vodacom, Tigo, Airtel and Econet are leveraging their mobile payment platforms to provide financial services like savings and credit at scale to African consumers (Gioko, 2015). In summary, while initially focused on elite segments, telecom MNCs in Africa have adapted their product offerings for mass market consumers as competition drove down basic service prices. Diversification into mobile financial services represents a key product policy shift to continue meeting African consumer needs.

***Price policy***

In the early stages of the African telecom market, regulatory environments were relatively lax, allowing companies to pursue diverse pricing strategies and innovations. According to Jahanbakht and Mostafa (2020), as the market developed, competition grew fiercer and pricing became the key differentiator, leading to a consolidation of the top competitors. Schoentgen and Gille (2017) explain that authorities responded by taking more control and introduced a more "hands-on" regulatory approach. Additionally, Djiofack Zebaze (2009) points out disparities in license fees across African countries led to investor scepticism about the "real" value of licenses, making companies reluctant to apply.

To sum it up, the pricing strategies in Africa's telecom markets, which were initially diverse, changed to intense competition and consolidation. This led to stricter regulation being implemented. Inconsistencies in licensing structures have been a challenge to MNCs' investment. The pricing policy changes that have been implemented demonstrate the changing dynamics and increased regulation within the African telecommunications industry as it continues to progress.

***Promotion policy***

The promotion mix, covering advertising, personal selling, public relations, direct marketing and sales promotions, is a key component of MNC marketing strategies when entering African markets. Given Africa's cultural variety across markets, telecom MNCs must engage in localised marketing that integrates global and local approaches (Burgess & Steenkamp, 2006). Mobile carriers such as MTN, Airtel, and Vodacom have primarily relied on television, radio, billboards, and social media advertising to develop brand recognition in African markets. To attract subscribers, celebrity endorsements and sponsorships are also often used. Traditional advertising, however, has a limited effect due to poor infrastructure, pushing telecom MNCs to use below-the-line promotions such as local events and van campaigns (Frimpong, Asare and Otoo-Arthur, 2016). Face-to-face marketing via direct sales teams and local dealer networks has proven critical in Africa for obtaining subscribers and creating connections (Ibeh et al., 2012).

***Place (distribution policy)***

MNCs encounter considerable obstacles in their distribution efforts due to the diversified regulatory environments and inadequate infrastructure in African countries. To overcome these obstacles, MNCs have adopted multi-channel distribution strategies that leverage a combination of traditional channels (e.g., retail stores) and innovative approaches like mobile money platforms and direct-to-consumer models. Although it requires significant expenses, direct management via company-owned infrastructure allows branding and monitoring of the consumer experience (Arnold & Quelch, 1998). For example, Vodacom relies heavily on direct distribution (Vodacom, 2023), while MTN and Airtel use local partnership networks to obtain market understanding and scale, and Tigo uses independent agents for cost efficiency. In the end, combining direct, partnership, and third-party distribution enhances control and knowledge while maximizing resources across a wide range of African markets.

### 3.2.4 Implementation and monitoring strategies

After the selection of entrance mode and marketing strategies, it is crucial for MNCs to carefully implement and monitor their actions when entering African telecom markets (Julian & Ofori-Dankwa, 2013). The firm needs to create a comprehensive operational plan that includes specific timelines, budget allocations, clear roles and responsibilities, and strategies for identifying and mitigating risks (Rugman & Verbeke, 2008). Continuously monitoring performance by utilising key metrics such as subscriber acquisitions, revenue, market share, and so on, offers valuable insights regarding progress and potential areas that may require adjustment. According to Killing (1983), it is proposed that when implementing entrance strategies that involve joint ventures or local partnerships, it is beneficial to establish well-defined governance mechanisms. These mechanisms can help foster effective collaboration with local partners throughout the process of rolling out and operating the venture.

Additional factors to consider involve establishing talent pools and succession plans aimed at cultivating native African leaders to ensure maintaining sustainability in the long run and having contingency plans provides alternative options if major risks materialize like political instability, policy changes, or infrastructure challenges (Julian & Ofori-Dankwa, 2013). Engaging in consistent market research allows MNCs to make informed decisions regarding the adjustment of branding, pricing, promotions, and service offerings in order to cater to the specific requirements of African consumers (Meyer et al., 2009).

For MNCs to keep up with the changing regulations and policies in Africa's markets, it is important for them to maintain good relationships with the government (Acquaah, 2007). It is advisable to adopt a balanced approach that combines global integration for economies of scale with local responsiveness to the unique dynamics of each African market. By implementing projects diligently and being open to adjusting strategies based on the specific characteristics of the local market, MNCs can successfully establish and grow their operations across the varied African continent.

# 4 METHODOLOGY

## 4.1. Research approach

A case study method has been chosen as the most appropriate for this dissertation research aiming to investigate the market entry strategies used by Viettel Global, an emerging market multinational (EMNCs) expanding into new country environments. Case studies, as noted by Yin (2018) allow the examination of contemporary phenomena in context to uncover the motivations and rationales underlying decisions. The rationale for selecting a case study approach aligns with the research objectives, and qualitative nature of the project.

The primary aim is to understand and explain the market entry strategies employed by Viettel Global in Mozambique by means of a comprehensive case study based on actual events. By concentrating on Movitel, which is VTG's overseas venture in Mozambique, it will be possible to identifying patterns in future market penetration strategies and highlighting unique aspects based on the country's circumstances. This will strengthen the analytical conclusions derived from the qualitative data as suggested by Yin (2018).

## 4.2. Research method and design

As primary interviews with Viettel Global personnel were not feasible, this study will rely heavily on secondary data sources. The case study of Viettel Global's Mozambican subsidiary – Movitel will be utilised. In replacement of interview data, comprehensive content analysis will be performed on the company's publicly available documents, reports, press releases, local subsidiary websites, marketing materials, media interviews, and other corporate information related to their international ventures. This will provide key insights into Viettel Global's positioning, products, and partnerships in Mozambican markets.

For the purpose of contextualising VTG's actions, desk research will also be employed to gather secondary data pertaining to telecom market trends, consumer segments, competitive forces, partnerships, and regulatory environments that are specific to Mozambique. By employing a structured methodology that incorporates keywords, categories, and codes, the content and document analysis will methodically determine messages and strategies that are relevant to adaptation approaches. Background information regarding market entry and the timeline of significant strategic advancements will be compiled for the case.

### 4.3. Data analysis procedure

The qualitative data collected from content analysis of Viettel Global's documents and secondary sources will be systematically analysed using coding procedures. The author will identify first-level concepts and themes related to the company's positioning, product offerings, and partnerships in Mozambique and then establish linkages to uncover key adaptation approaches, strategies, and patterns.

Given the single case study nature of this research, the focus will be on in-depth analysis of Movitel's adaptation strategies in Mozambique. Explanation building analysis will be used to develop propositions on factors driving Movitel's standardization versus localization strategies, following Yin (2018)'s outline. Quotes and excerpts from the secondary documents will be used to supplement the findings.

Thematic analysis, as mentioned by Braun and Clarke (2013) is effective for discovering themes in qualitative data that are compatible with organising the case's setting. This was consistent with the organization of the case's context. This research adopts the 6-phased thematic analysis model proposed by Braun and Clarke (2013), with the adjustment to the data sources.

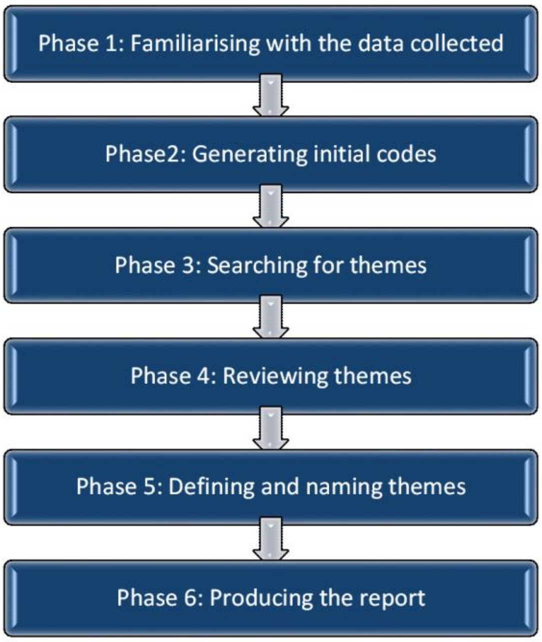


FIGURE 2. Six phases of thematic data analysis (Braun and Clarke (2013)

*(i) Phase 1: Familiarisation with data*

There are several secondary sources available regarding Viettel Global and its Mozambique branch. The main chosen sources are Viettel Global's annual report (available from 2012 to 2022) and Movitel's official website; and the supporting ones include annual reports of telecom industry's organizations (both governmental and non-governmental), press release data and credible e-magazines.

The focus of this study is solely on the Mozambican market. Consequently, the initial step in processing the raw data would be to extract only those entries that pertain to the Mozambican market by employing market-specific keywords such as "Movitel," "E-Mola," and "Mozambique". Afterwards, all relevant information will be translated from Vietnamese to English, then the data was classified in line with the research goals.

*(ii) Phase 2: Generating preliminary codes.*

Coding is the procedure of finding relevant topics and creating theoretical categories and themes to create a structure and divide the big chunk of data into more manageable pieces (Charmaz and Belgrave, 2012). After becoming familiar with the data, the author began to generate the initial codes with consistency and transparency. During this phase, the data were read, and the first new codes were formed. In addition, detailed literature study and theme analysis were employed. The data were tentatively categorized and coded based on the major topics from the literature review. Due to the straightforward nature of the data, which primarily consists of reports that can be easily classified into tables.

Initially, categories were created and tagged based on the literature in Chapter 2, namely: motivation, market selection, choosing market penetration methods, choosing market penetration strategies, planning policies to bring services on sale, implementation and monitoring, etc. Some codes were used verbatim, while others were classified as per areas of interest. The process continued until no parts of related materials remained uncoded.

*(iii) Phase 3: Searching for themes.*

The third phase consisted of defining the themes from the outcome from the second phase, with the intention to organise the data into categories that addressed the research question by breaking it down into themes and thematic segments. This step involved connecting the codes and identifying themes throughout the set of data. At this point, similarities and contrasts were forming, pointing to potential points of agreement and disagreement regarding research question. Codes were created inductively, rather than by fitting them into a pre-existing coding scheme.

*(iv) Phase 4: Reviewing themes.*

Since the original code and themes may have errors that require revisions, the set of themes developed in the earlier phases was reviewed in this step by going over the coded data extracts for each topic to see if they seemed to create a coherent pattern (King, 2014). To determine whether the themes accurately reflect the meanings of the evidence in the entire data collection, each theme must be evaluated separately (Braun and Clarke, 2006). A new code may be added if an existing code is unable to address a significant issue in the text. By the time this phase ended, data had been gathered, and the various themes were examined to see how they related to each other and the larger picture (Braun and Clarke, 2006).

*(v) Phase 5: Defining and naming themes*

Based on the complete dataset pertaining to the research topic, this step established a thorough analysis for every theme. Prior to contemplating the themes, a comprehensive assessment of all pertinent data was conducted in order to validate the findings. After that, the themes' names were examined to see if they had anything to do with the goals and research question.

*(vi) Phase 6: Producing a report.*

Following the conclusion of the five prior phases, the author proceeded with the final analysis and report. The themes, or codes, were tabulated and discussed in the report's conclusion section. The discussion then circled back to the investigation's original theoretical basis and the supporting research.

# 5 ANALYSIS AND FINDINGS

## 5.1. Data collection

The chosen methodology for this research as a case study requires collecting secondary data from various sources. The content and sources proposed for the data collection are detailed in the table below:

TABLE 1, Sources and content of data collection for the case of Movitel (VTG in Mozambique)

| Content | Relevance to research question(s) | Sources |
|---|---|---|
| Mozambique telecom market background | Q1 | Market reports |
| Movitel's background as a VTG subsidiary | Q1 | VTG annual reports<br>Market reports<br>Secondary research data |
| Target market selection | Q2 | VTG annual reports<br>Newspapers<br>Secondary research data |
| Market penetration methods | Q2 | |
| Marketing policies to introduce products and services | Q2 | |
| Strategy implementation | Q1, Q3 | VTG annual reports<br>Newspaper<br>VTG's internal blogposts |
| Strategy monitoring | Q1, Q3 | |

## 5.2. Presentation of the case: Viettel Global in Mozambique (Movitel)

Viettel Global (VTG) was established in 2006 as a subsidiary of Viettel Group, with 98% of its capital investment coming from the parent company. Its primary purpose is to oversee Viettel's foreign investments and activities (Viettel Global, 2017). Starting with Laos and Cambodia, VTG has extended its presence to 10 markets in Asia, Latin America, and Africa (Thanh Thu, 2018).

As of the conclusion of 2017, VTG has successfully obtained over 40 million consumers from various countries via its mobile, broadband internet, landline, and wireless phone services (Viettel Global, 2017). Impressively, in the same year it held the top market share among telecommunications providers in five of its foreign countries, namely Cambodia, Laos, Timor-Leste, Mozambique, and Burundi (Viettel Global, 2017).

The EMNC achieved profitability in eight countries and saw a yearly revenue growth rate of 21.5% as of 2018 (Viettel Global, 2019). The firm has had significant growth in its capital, increasing it by 45 times, after more than a decade of expanding internationally. As a result, it has achieved a prominent position among the leading global telecommunications businesses (Thanh Mai, 2018). VTG's worldwide customer base saw a growth rate of 13% in 2017, which is four times more than the average growth rate of 3% in the global telecommunications industry (Viettel Global, 2017). It has achieved a position among the top 15 multinational telecommunications companies in terms of the number of subscribers and among the top 40 in terms of revenue after more than 10 years of operation (Thanh Mai, 2018). Viettel Mozambique, Viettel Cameroon and Viettel Burundi have seen robust growth rates of 43%, 43% and 42% respectively in the emerging African markets (Minh Anh, 2018), contributing to Viettel’s business achievements on foreign markets.

By increasing connectivity, the telecom services provider Movitel hopes to elevate the standard of living in Mozambique and establish itself as the country's top operator. By combining the words "movement" and "telecom," the company's name signifies advancements in telecommunications (Gillwald and Mabila, 2016).

The company was established in 2011 as a joint venture between Viettel Global and Mozambique’s SPI, with the share of 70% and 30% respectively (VTG, 2023). It launched in 2012 and now offers a comprehensive range of services, including: mobile voice and data plans, mobile internet access, mobile financial services (MFS) through its E-mola platform, fixed-line services and digital value-added services (Movitel, 2023).

It was referred to as a “miracle” in the Mozambican telecommunications market. Six months following its 2012 debut, total revenue reached $61.6 million. The following two years were marked by substantial expansion, reaching $154.4 in

2013 and $180 million in 2014. The company also earned international recognitions with awards such as: Golden Globe for Fastest Growing Company of the Year in Middle East & Africa, Best Operator in an Emerging Market, Best Mobile Innovation Award, and Competitive Strategy Leadership Award (Viettel Global, 2015; Viettel Global, 2016; Gillwald and Mabila, 2016).

In 2022, Movitel holds a 44.3% market share, making it the second largest Mozambique’s mobile operator. For four consecutive years from 2019 to 2022, Movitel has achieved growth of over 20%. The company is also proud to be the largest contributor to Mozambique's national telecommunications infrastructure, with 2,163 base stations and approximately 33,700 kilometres of fibre optic cable, covering 92% of the population. Movitel's financial revenue in 2022 exceeded $204 million, with cash flow reaching $71.5 million, the highest ever and 1.8 times more than 2021. Movitel has also begun to find a way forward for its e-wallet business with many promising results: the number of e-wallet subscribers increased by 1.3 million, reaching a cumulative of nearly 2 million subscribers, which is 2.5 times more than 2021 (VTG, 2023).

## 5.3. Analysis of Viettel Global’s market penetration into Mozambique

### 5.3.1 Selecting target market and customers

Throughout its seventeen years in operation (2006-2023), VTG’s international expansion plans have been strategically centred on developing countries' emerging markets with high growth potential - many of which are in Africa and the Central and South Asia. Specifically, it has targeted markets with low telecommunications infrastructure and penetration rates at time of entry, which allows room for gaining market share. This is evident in all the 9 foreign markets in which the organization presently operates (refer to Appendix 1). To mitigate risk, Viettel has also favoured nations that possess adequate political and economic stability, as demonstrated by its preference for Peru, Tanzania, and Mozambique over more precarious alternatives.

Additionally, some target market selections have been influenced by proximity to Viettel's native country of Vietnam, enabling the company to utilize resources from its headquarters (e.g., neighbouring markets such as Laos and Cambodia). Demographic characteristics that are favourable for the expansion of telecommunications, including large and vibrant populations, have also been decisive factors. It is worth noting that over 60% of the population in Africa are below the age of 25 (Weny, Snow and Zhang, 2017). Due to its emphasis on mobile networks (Viettel Global, 2013; Viettel Global, 2014), Viettel has also directed its efforts towards areas that possess inadequate fixed-line infrastructure.

The Mozambican telecoms sector is an excellent case study of digital infrastructure's revolutionary potential. The business has seen exceptional expansion in recent years, thanks to a combination of factors such as a growing population, increased disposable incomes, and government efforts (Oleksy, 2023).

Three companies—Vodacom Mozambique, Movitel, and Mcel—control this constantly evolving market (Oleksy, 2023). With an impressive market share of about 40%, Vodacom is the market leader. Movitel, a joint venture between SPI, INVESPA in Mozambique and Viettel Global in Vietnam (Viettel family, 2023), has quickly grown its market share since entering in 2012. It now has about 35% of the market, while Mcel, which is owned by the Mozambique government, has about 25%. Smaller operators include Tmcel – owned by the state railway company and Africom – owned by Zimbabwe's Econet Wireless (Oleksy, 2023).

The tremendous increase in mobile subscriptions is at the core of this growing sector. Driven by the combination of lower costs and the widespread use of smartphones, it is projected that mobile usage will achieve a penetration rate of 42.66% by 2023. This indicates a dynamic scenario where a significant portion of the population is digitally connected (Statista, 2023). The rising popularity of mobile apps and online platforms is driving the growth in mobile internet use, which in turn is further supported by the move towards data services (Lancaster, 2023). However, Mozambique's route to a fully realized digital future is not without obstacles. One of the most significant issues is the lack of infrastructure, especially in rural regions (Lancaster, 2023; Oleksy, 2023). This infrastructural gap prevents a significant proportion of the population from accessing telecom services, limiting economic growth and social inclusion. Furthermore, the cost of mobile data and voice services remains quite high in comparison to other African countries, which may dissuade prospective consumers and restrict the sector's penetration. Aside from infrastructural and price issues, Olesky (2023) points out a further obstacle is a lack of digital literacy skills. A huge portion of the population lacks the knowledge and skills required to properly use the tremendous potential of telecom services. Bridging the digital gap is essential for providing fair access and cultivating a digitally enabled population.

Despite these obstacles, the Mozambican telecom sector presents appealing potential for investors and stakeholders. The government's commitment to infrastructure development, along with recent investments in fibre optic networks, gives a major opportunity for enterprises to engage in digital infrastructure growth, especially in underserved rural regions (Oleksy, 2023). In 2019, the Mozambique government initiated a $1.5 billion attempt to construct a nationwide fibre-optic infrastructure, facilitating connectivity throughout all provinces and giving high-speed internet access to over 90% of Mozambican (Oleksy, 2023). The government has also focused on promoting market competition, with a new licensing regime implemented in 2018 to facilitate the entrance of new operators and the delivery of new services – leading to the introduction of novel services such as mobile banking and mobile money.

Furthermore, the increased demand for data services presents an ideal environment for the creation and implementation of novel data-driven solutions that address the particular demands of the Mozambican population. MNCs may work with government agencies and educational institutions to create complete digital literacy initiatives that empower people and help them realize their full potential in the digital age. Finally, developing strategic alliances with the government may aid in navigating the regulatory landscape and creating a favourable climate for investment and development.

To conclude, the Mozambican telecommunications market is at a crossroads. Even if there are still issues, the future appears bright due to the potential for development and the government's commitment to digital equality. Telecom

MNCs may contribute to the development of a healthy digital environment in Mozambique by addressing existing issues and capitalizing on current possibilities. It aligns perfectly with VTG's criteria, making it a promising choice for market entry. This decision is expected to yield consistent profits and significantly contribute to VTG's overall performance.

### 5.3.2 Market penetration and investment strategies

As of 2023, VTG has formed 9 subsidiaries and joint ventures across 9 foreign markets (Viettel Global, 2023). Among these, four were established through direct investments by Viettel Global in the form of subsidiaries, while the remaining entities were joint ventures between VTG (which holds over 40% of the charter capital) and prominent domestic enterprises (Van Dinh, 2018).

Viettel Global chose to enter the Mozambique market by forming a joint venture with the local company SPI, in which VTG holds a 70% stake. SPI subsequently divested 10% of its shares to INVESPA (Viettel family, 2023). Viettel utilised SPI's existing infrastructure and customer base through this entry approach, resulting in accelerated market entrance and cost reduction in comparison to establishing a fully owned subsidiary. As for Finnerty, Owers and Rogers (1986), by forming a joint venture, VTG could mitigate risks and reduce costs by using its partners' understanding of local rules, culture, and business networks (Viettel Global, 2012; Viettel Global, 2013).

Simultaneously, the joint venture structure enabled Viettel to retain authority over technical operations and exert its influence on strategic choices as the dominant partner. Viettel has the potential to offer its knowledge and proficiency gained from other emerging markets to the collaboration, while also taking use of SPI's vast distribution network that covers all provinces in Mozambique (Viettel Global, 2013). The integration of scale and capabilities played a crucial role in effectively competing against well-established local competitors like as Vodacom and M'cel. The joint venture with SPI offered crucial financial resources and specialised expertise in mobile networks, enabling diversification from fixed-line services. In a recent VTG's internal blogpost (Viettel family, 2023), the company reported:

> “*The key to Movitel's stability in Mozambique lies in its 70-30 joint venture model, which helps to harmonize the interests of all parties involved, including Viettel, the two local partners SPI and INVESPA. In this model, Viettel holds a 70% stake, SPI holds a 20% stake, and INVESPA holds a 10% stake.”*
> *“This harmony of interests helps all parties involved, including the local partners, feel hay and respected, which in turn provides a solid foundation for Movitel. Vitor Timoteo, Chairman of the Board of Directors of Movitel, shared: "We are very lucky to have Vietnamese people working with us. This is a very stable relationship*.”

Overall, the joint venture entry method successfully achieved a balance for Viettel in terms of utilising local expertise, minimising risk, and retaining strategic control while entering the competitive Mozambique telecommunications market as a foreign entity.

### 5.3.3 Developing and implementing marketing strategies

Movitel's operational alignment resulted in more than 37% market share in the first three years of its establishment (Viettel Global, 2015; Gillwald and Mabila, 2016). This section examines the operator's 4Ps marketing mix (product, pricing, placement, and promotion) to better understand how each aspect in the Mozambican market is optimised to attain such a result.

***Product policies***

A core focus of Movitel's product strategy is providing extensive network coverage and reliability. The company has built infrastructure like towers and fibre optic cables to offer connectivity in rural villages previously ignored by competitors. By 2015, Movitel already had 1877 2G/3G base stations across the nation as of 2015, compared to Vodacom's 1384 and mCel 2's 2058 stations (Gillwald and Mabila, 2016). Thanh Luong (2015) quoted the President of Niassa province - Mr. Arlindo Goncalo Chilundo:

> *“In 15 years of being in Niassa, Vodacom has only built 5 towers in the centre of the 5 districts closest to the Niassa capital. Movitel has only been operating for less than 4 years but has the largest number of transmission stations in Niassa, Movitel can connect Mozambicans anywhere, even the small villages we have mobile phone coverage, Internet. Many schools benefit from the free internet provided by Movitel, we are very grateful,”*

During emergencies like floods, Movitel maintains service availability where other providers fail. This focus on reach and resilience provides basic 2G and 3G mobile services like voice, SMS and data to Mozambique's low-income consumers.

Movitel gives trial SIM cards, cheap beginning equipment, and free internet connectivity to schools as an effort to encourage adoption—even in distant locations. Customers with restricted daily spending are also retained by flexible pay-as-you-go pricing arrangements (Viettel Global, 2013; Thanh Luong, 2015). Over time, Movitel have now introduced many more services on top of the basic ones, such as mobile money (E-mola) and service packages (mobile packages, internet packages, digital services) and products (affordable mobile devices), in addition to basic connection in order to increase income (See Appendix 2).

***Price policies:***

In the past, mobile service costs in Mozambique and other Sub-Saharan African countries were comparatively high, which contributed to the region's high termination rate (Mabila, 2013; Gillwald and Mabila, 2016). In 2012, the symmetric mobile termination rate glide path was implemented by the telecom regulator INCM, same year with the establishment of Movitel. These changes enhanced rivalry and ultimately resulted in a reduction in prices.

The entrance of Movitel and its low-price strategy compelled incumbents mCel and Vodacom to decrease their prices. For example, Movitel priced 1GB of data considerably below its competitors in 2014. As a result, its rivals were compelled to reduce their prices over the subsequent two years. By 2016, all three service providers levied an identical tariff of 200MZM per 1GB (see FIGURE 3)

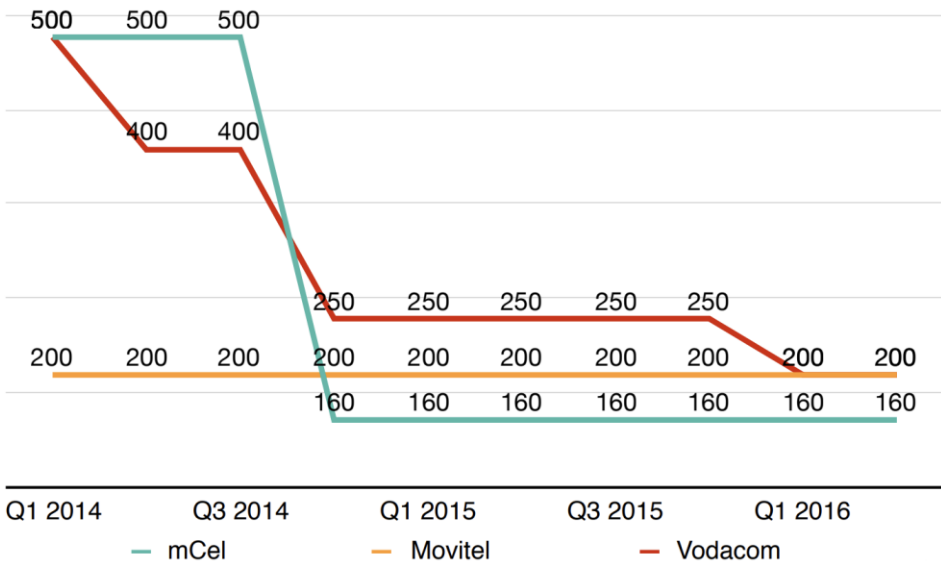


FIGURE 3. Mobile data pricing post-Movitel (INCM,2015)

Since 2014, Movitel has maintained a fixed pricing of 200MZM per gigabyte of data. According to RIA's Bundled Value Index, its prepaid bundled offers, such as 200MZM airtime with data, SMS, and call incentives, are also of excellent value, scoring 30% higher than mCel's top bundle in 2016.

The escalating prevalence of Movitel's data bundles signifies the expanding importance of mobile data in comparison to telephony services. As a result of its competitive pricing strategy, Movitel has significantly altered the competitive environment since its inception. A result of these declining prices, consumers gain.

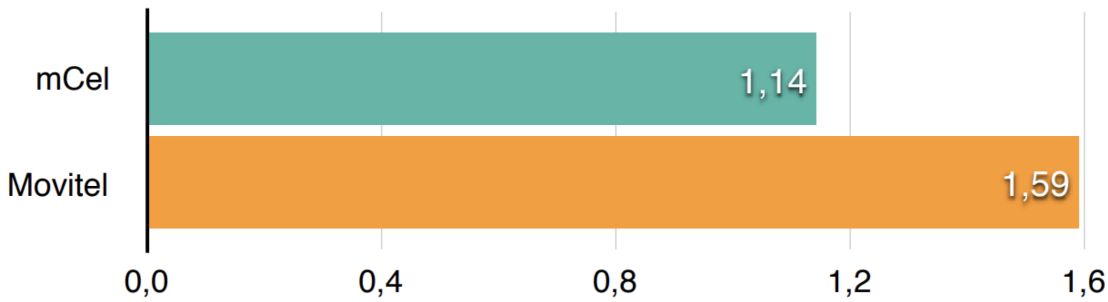


FIGURE 3. Value for Money Index in bundles products (Q2 2016: RIA, RAM database, 2016)

***Promotion and place policies:***

Movitel runs active promotions to attract new subscribers and stimulate demand. The firm interacts with customers directly by utilising local weekend markets in districts throughout Niassa province and other provinces (Thanh Luong, 2015). Bright orange umbrellas are used to attract attention and accentuate Movitel displays. As promotional activities to advertise Movitel's services, sales teams conduct demonstrations, distribute free trial starter kits, and run promotions (See Appendix 3).

Beyond physical markets, Movitel staff conduct door-to-door promotions when visiting remote villages. They provide starter bundles and complimentary trial SIM cards to acquire first-time users (Thanh Luong, 2015; Viettel family, 2022). For existing subscribers who have not recharged in a while, Movitel provides free units to retain them and encourage future purchases. Also, early morning promotions are done to attract customers starting their day. Word-of-mouth is also leveraged by providing select services like free internet access to local schools. As students and teachers use the connectivity, brand awareness spreads organically (Viettel Global, 2015). The company runs localised promotions like offering rice cookers and meals to connect culturally with Mozambican consumers (Thanh Luong, 2015).

Movitel has built an extensive distribution network covering all provinces in Mozambique to make its products and services accessible. In 2015, in the Niassa province alone, Movitel has 17 direct stores, 1 dealer, and 68 home officers to enable sales. Additionally, to reach rural populations, it has over 1600 points of sale and 600 sales associates working door-to-door to reach rural populations (Thanh Luong, 2015). Movitel has deployed fibre optic connections and towers in previously untapped rural areas to allow this scattered distribution network. This coverage extension supports Movitel's strategy of employing rural areas as launch locations before surrounding cities and gaining market share.

The distribution approach has been to first lay the infrastructural foundation, then immediately enter rural markets, and eventually encircle incumbent strongholds in cities (Thanh Luong, 2015; Viettel family, 2015; Viettel Global, 2023). Using underserved regions to Movitel's advantage has resulted in rapid subscriber acquisition when compared to competitors. The company's goal is to develop a presence in marketplaces and villages so that Mozambicans may use its network from anywhere.

### 5.3.4 Monitoring penetration strategy

Closely monitoring key metrics like network performance, sales funnels, and user data allowed Viettel to make evidence-based adjustments to their penetration plan. This data-driven approach, coupled with a deep understanding of diverse customer segments through usage pattern analysis, informed optimal pricing strategies and product bundling. Furthermore, implementing lean operations and stringent cost controls ensured the company's agility and adaptability. The Movitel branch in Mozambique, like with other branches, undergoes regular and ongoing supervision, as indicated by the quarterly and annual reports of VTG, as well as press releases and internal media publications.

Viettel's meticulous execution of their penetration strategy, encompassing efficient infrastructure development, distribution expansion, market research, targeted promotions, and continuous performance tracking, allowed them to overcome the established competition and capture a significant market share. The company remains committed to sustained investment and operational refinement, aiming to solidify its leadership position in Mozambique's telecommunications market.

# 6 DISCUSSION AND CONCLUSION

## 6.1. Conclusion on research questions

The objective of this study was to examine the strategies employed by telecom EMNCs to enter African markets. The case study focused on Movitel, a subsidiary of Viettel Global, operating in Mozambique.

Regarding the first research sub-question (Q1), the examination of VTG's market entrance and expansion strategy revealed that it employed strategic market selection criteria to find countries, such as Mozambique, that had low market penetration and political stability, but great potential for growth. The company entered the market through a collaboration with the local firm SPI, in order to take advantage of the already established infrastructure and contacts. Due to consistent investments in infrastructure, the company was able to achieve extensive rural coverage ahead of competitors. The speedy acquisition of subscribers was achieved through the recruitment and training of local teams, vigorous sales and marketing, and diligent performance tracking.

It can be concluded for the Q2 question that VTG navigate in the Mozambique institutional environment by forming a joint venture with a local partner – which aided regulatory compliance and sociocultural understanding. A balance was struck between Movitel's global expertise and local responsiveness in its marketing mix, as evidenced by low-income-appropriate pricing and culturally pertinent promotions. In addition, the expansion of its infrastructure mirrored the government's development objectives.

For the final question (Q3) concerning the utilisation of capabilities to gain a competitive edge, this study argues that Viettel transmitted its expertise in technology regarding streamlined mobile networks in order to facilitate service provision in rural Mozambique. The development of sales models and product localization in this market was informed by insights gained from other emerging markets. Viettel's economies of scale facilitated swift investments in coverage expansion.

As a result of strategic market selection, partnerships, capability transfer, and customised execution, Movitel was able to successfully penetrate the market. When expanding into Africa, the analysis offers insights into how telecom EMNCs may overcome the liabilities of foreignness and catch up to competitors. Further primary research can enrich understanding of internal firm perspectives.

### 6.2. Practical implications

Several practical implications for telecom EMNCs can be gleaned from the analysis of VTG's market penetration strategies in Mozambique. In the African market, to close the gap with well-established local competitors, these EMNCs must employ strategic investments, capability transfer, individualised execution, and local partnerships in a methodical fashion. This study presents the following implications derived from VTG in order to assist EMNCs in developing effective expansion strategies for entering Africa:

Table 2: Practical implications

| Category | Implications |
| --- | --- |
| Market Selection | Perform an in-depth assessment of market potential and strategic compatibility by analysing factors such as penetration rates, growth, demography, political climate, and other relevant indicators. |
| Partnerships | Form joint ventures with local firms to capitalise on their infrastructure, networks, regulatory knowledge, and sociocultural comprehension. |
| Infrastructure Rollout | Prioritize extensive infrastructure investment before competitors to gain wide coverage rapidly, starting from rural areas. |
| Recruitment and Training | Hire and educate local staffs to enable effective customer interactions aligned with cultural norms. |
| Marketing Mix | Balance cost efficiency and profitability with localization across product, pricing, promotion, and placement strategies. |

### 6.1. Limitation

The first limitation lies in the exclusive reliance on secondary data of this research. While this data is valuable, it may not provide the same depth, contextual richness, or current insights that primary data, collected directly from the source, could offer. Secondary data is not specifically tailored to answer the research questions and may lack details regarding certain aspects of Viettel Global's strategies in Mozambique. Even though the research endeavours to use the most relevant and recent secondary data, the lack of primary data, such as interviews or surveys, could limit the comprehensiveness of the analysis. Moreover, there might have potential discrepancies between media portrayals of the company and actual practises.

Second, the thematic analysis approach makes it difficult to strike the proper balance between too loosely defined initial themes excessively broad and those that are excessively specific, hence introducing uncertainty into the critical analysis process. Biases may arise as this study heavily depends on the topic identification and structure, which are the crucial components of the thematic method.

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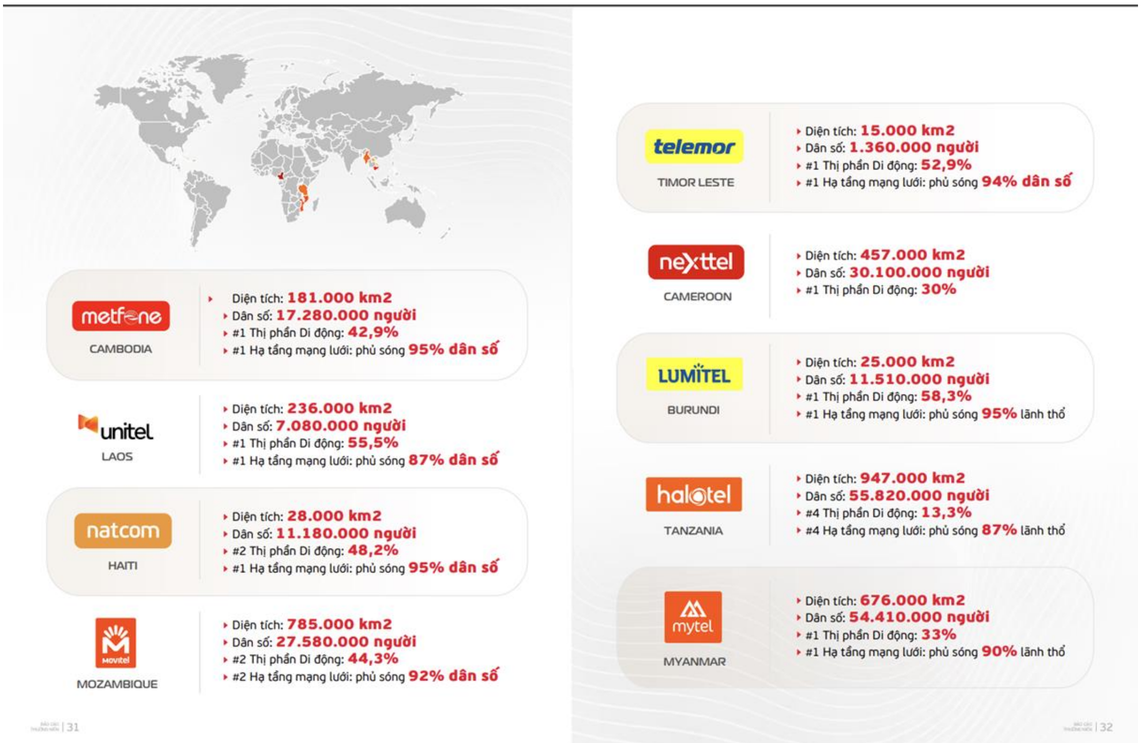
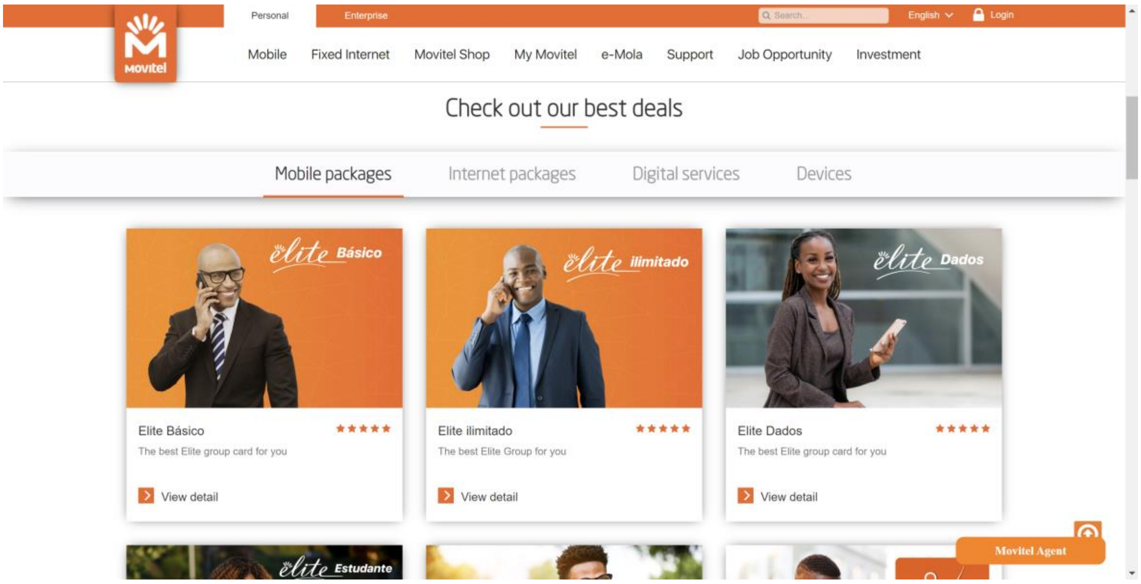
## APPENDICES

Appendix 1. Viettel Global’s current markets



Appendix 2. Movitel's products and services offerings



Appendix 3.