

Information note to the Press
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Telecom Regulatory Authority of India

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TRAI Releases Report of the independent agencies engaged for the Objective Assessment of Quality of Service and Customer Satisfaction Survey of Telecom Services in Jammu & Kashmir service area.

New Delhi, 25th May 2009 - TRAI engaged M/s. IMRB as independent agency for conducting an objective assessment of the Quality of Service provided by basic and cellular mobile telephone service providers and broadband service providers and Voluntary Organisation in Interest of Consumer Education (VOICE) for conducting subjective customer satisfaction surveys for assessing the customers' perception of the service and to assess the implementation and effectiveness of Telecom Consumers Protection and Redressal of Grievances Regulations, 2007.

2. Key Findings of the independent agency on Quality of Service

Telecom service providers are not meeting Customer satisfaction benchmark. The Authority demands better treatment to the customers particularly in resolving the grievances of customers by the service providers. TRAI carried out a customer satisfaction survey through VOICE for Jammu & Kashmir service area during the period from September'08 to November'08. The survey covered 1,202 mobile subscribers, 384 fixed line subscribers and 384 broadband subscribers across the various districts/ cities of Jammu & Kashmir service area spread across various geographies and customer strata.

2.1 Proportion of satisfied customers on various customer service perception parameters

2.1.1 Cellular Mobile Telephone Service: In Jammu & Kashmir service area the survey of customers' satisfaction of service of service providers, namely, Bharti-Airtel, BSNL, Reliance Communications (RCom), and Aircel (Dishnet Wireless) was conducted. The gradation on "Satisfaction" score i.e. scores of "Very Satisfied" and "Satisfied" is given in Table-1 below. The survey results reveal that there is a need to improve the satisfaction level of subscribers in all the parameters, except Network Performance and Overall satisfaction. The main reason identified, in respect of dissatisfaction relating to accuracy of billing /charging performance of various service providers, is that the charges not levied as per tariff plan, charges levied on account of the services not made/used/subscribed and detail of Itemised charges not given.

Table-1 {Cellular Mobile Telephone Service – Jammu & Kashmir service area}

| Name of Service Providers (Sample Size) | Percentage (%) Customers Satisfied With | | | | | | | |
|---|---|---------------------|---------|---------------|---------------------|-----------------|------------------------|----------------------|
| | Provision of service | Billing Performance | | Help Services | Network Performance | Maintainability | Supplementary Services | Overall Satisfaction |
| | | Post paid | Prepaid | | | | | |
| Bharti Airtel (384) | 81.2 | 68.0 | 83.7 | 74.4 | 96.4 | 92.8 | 87.0 | 96.6 |
| BSNL (384) | 86.6 | 58.3 | 88.1 | 53.6 | 84.7 | 72.7 | 92.9 | 97.4 |
| R-COM (50) | 77.8 | 77.3 | 60.5 | 68.2 | 98.0 | 98.0 | 83.3 | 98.0 |
| Aircel (Dishnet) (384) | 82.0 | 68.4 | 87.9 | 71.5 | 97.1 | 96.2 | 93.2 | 98.2 |

Note: Shaded areas indicates areas of significant weakness

Source: TRAI survey carried out by VOICE based on sample of 1,202 subscribers

Basic Telephone Service (wire line):

2.1.2 In Jammu & Kashmir service area the survey of customer's satisfaction of service of service provider namely, BSNL was conducted. The gradation on "Satisfaction" score i.e. scores of "Very Satisfied" and "Satisfied" is given in Table-2 below. The survey results reveal that there is a need to improve the satisfaction level of subscribers with respect to all the parameters, except Billing Performance (Post paid) and Overall Satisfaction.

Table-2 {Basic Telephone Service – Jammu & Kashmir service area}

| Name of Service Providers (Sample Size) | Percentage (%) Customers Satisfied With | | | | | | | |
|---|---|---------------------|---------|---------------|---------------------|-----------------|------------------------|----------------------|
| | Provision of service | Billing Performance | | Help Services | Network Performance | Maintainability | Supplementary Services | Overall Satisfaction |
| | | Post paid | Prepaid | | | | | |
| BSNL (384) | 93.8 | 94.4 | 60.0 | 86.7 | 92.8 | 85.9 | 81.3 | 95.6 |

Note: Shaded areas indicates areas of significant weakness

Source: TRAI survey carried out by M/s VOICE based on sample of 384 subscribers

Broadband Service:

2.1.3 In Jammu & Kashmir service area the survey of customers satisfaction of service of the service provider BSNL was conducted. The gradation on “Satisfaction” score i.e. scores of “Very Satisfied” and “Satisfied” is given in Table-3 below. The survey results reveal that there is a need to improve the satisfaction level of subscribers with respect to Billing Performance, Helpline, Maintainability and Supplementary services.

Table-3 {Broadband Service–Jammu & Kashmir service area}

| Name of Service Providers (Sample Size) | Percentage (%) Customers Satisfied With | | | | | | | Overall Satisfaction |
|---|---|---------------------|---------|---------------|---------------------|------------------|-------------------------|----------------------|
| | Provision of service | Billing Performance | | Help Services | Network Performance | Maintain ability | Supple mentary Services | |
| | | Post paid | Prepaid | | | | | |
| BSNL (384) | 95.5 | 88.0 | 66.7 | 60.0 | 85.9 | 84.8 | 81.8 | 87.7 |

Note: Shaded areas indicates areas of significant weakness

Source: TRAI survey carried out by M/s VOICE based on sample of 384 subscribers

2.2 Objective Assessment/Audit of Quality of Service performance

2.2.1 Cellular Mobile Telephone Service: In Jammu & Kashmir service area the audit of quality of service data of service providers, namely, Bharti-Airtel, BSNL, Aircel (Dishnet Wireless) was conducted. The audit for Cellular Mobile Telephone Service Providers was conducted at their respective MSCs in the J&K circle. Service Provider’s performance in respect of cellular mobile telephone service based on one month data is given in Annex-`1`. The areas of concerns i.e. parameters, for which benchmarks is not met by the service providers, are identified based on analysis of one month QoS performance data and live measurement as below:

- SDCCH/Paging Channel Congestion
- Call drop rate
- Call answered by the operators
- Cells exceeding 3% call drop

2.2.1.1 Drive Test: The drive tests were conducted in the cities of Jammu, Kathua, Batote to verify parameters like Call Drop Rate, Call Set-up Success Rate, Blocked Call Rate and Connections with Good Voice Quality. The areas of concerns (i.e. parameters) are identified as below:

- Blocked Call Rate
- Call Drop Rate
- Connections with good voice quality

2.2.2 Basic Service (wire line): In Jammu & Kashmir service area the audit of quality of service data of basic service provider namely, BSNL was conducted. Basic

services (Wire line)audit for J&K circle broadly indicates that the service provider could not meet the benchmark for some of the parameters specified by TRAI. Service Provider's performance in respect of basic service (wire line) based on one month data is given in Annex-'2'.

2.2.3 Broadband Service: In Jammu & Kashmir service area the audit of quality of service data of service provider namely BSNL was conducted by independent agency M/s. IMRB International. The audit for Broadband Service Provider was conducted at their respective network operating centre/point of presence (POPs) in the J&K circle. The performance of M/s BSNL based on one month data is given in Annex -'3'. The report reveals that the service provider is meeting the benchmarks of most of the parameters.

3. Telecom Consumers Protection and Redressal of Grievances score: The results of the survey reveal that 88.5% of Basic telephone, 98.8% of Cellular mobile telephone and 95.0% of Broadband service customers claimed to be aware of the Call Centre while the awareness of nodal officer and appellate authority for redressing grievances is negligible. 65.1% of basic telephone, 62.1% of the Cellular mobile telephone and 71.4% of Broadband service customers who had lodged complaints said that they were satisfied with the system of resolving their complaints by the call centres. Service providers need to take effective steps for bringing awareness about three stage redressal mechanism including contact details of Nodal Officers/ appellate authority to improve customers satisfaction.

4. Value Added Services: The Authority had entrusted the survey agency to undertake survey about the provision of value added services without explicit consent by all the service providers. The reports of the survey agency reveal the following position about provision of value added services without explicit consent of the consumers;-

| Question: Did the service provider have your explicit consent before providing the chargeable value added service such as ring tone, emails / GPRS, voice mail etc. ? | | | | | |
|--|--|--------------|-------------|--------------|-------------|
| Name of Service Provider | Total customer surveyed, who have given specific response | Yes | | No | |
| | | Count | %age | Count | %age |
| Airtel | 69 | 29 | 42.0 | 40 | 58.0 |
| BSNL | 42 | 8 | 19.0 | 34 | 81.0 |
| RCOM | 6 | 2 | 33.3 | 4 | 66.7 |
| Aircel (Dishnet) | 59 | 46 | 78.0 | 13 | 22.0 |
| Overall | 176 | 85 | 48.3 | 91 | 51.7 |

5. The survey revealed that about 51.7% customers were provided value added services without their explicit consent. It is revealed that most of the service providers have considerably higher number of such responses for provisioning of Value added service without explicit consent of the customers. BSNL being the highest at 81.0%.

6. ***The detailed Report on Quality of Service – Audit/Objective Assessment and Customer Satisfaction Survey, including grievance redressal mechanism, conducted during the period September 2008 to March 2009 is placed at TRAI Website (www.trai.gov.in).***

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**Service provider performance report based on one month data verification:
Cellular Mobile Services**

| Parameters | Benchmark | Bharti Airtel | BSNL GSM | Dishnet Aircel |
|---|---|---------------|----------|----------------|
| Accumulated downtime for community isolation | < 24 hrs. | 0.00 | 0.00 | 0.00 |
| Call Set Up Success Rate (CSSR) | > 95% | 97.33% | 98.25% | 96.70% |
| Service Access Delay* | 9 to 20 seconds (< = 15 seconds for 100 calls) | 4.62 | 12.00 | 4.00 |
| Blocked Call Rate | | | | |
| <i>SDCCH /Paging Channel Congestion</i> | <1% | 0.42% | 0.90% | 3.50% |
| <i>TCH Congestion</i> | < 2% | 0.88% | 1.75% | 1.81% |
| Call drop rate | < 3% | 1.78% | 9.73% | 1.79% |
| Percentage connections with good voice quality* | > 95% | 96% | 94.43% | 94.53% |
| Service coverage* | | | | |
| <i>In door</i> | >-75dbm | Complied | Complied | Complied |
| <i>In vehicle</i> | >-85dbm | | | |
| <i>Out door - in city</i> | >-95dbm | | | |
| POI congestion | < 0.5% | Complied | Complied | Complied |
| Calls answered electronically | | | | |
| Percentage calls answered within 20 seconds | 80% | 85% | 40% | 100% |
| Percentage calls answered within 40 seconds | 95% | 90% | DNA | 100% |
| Calls Answered by the operator | | | | |
| Percentage calls answered within 60 seconds | 80% | 81% | 53% | 13% |
| Percentage calls answered within 90 seconds | 95% | 90% | 61% | 13% |
| Billing Complaints | | | | |
| Billing complaints per 100 bills issued | <0.1% | 0.03% | 0.62% | NA |
| Percentage billing complaints resolved within 4 weeks | 100% | 100% | 100% | NA |
| Period of refunds/payments due to customers from the date of resolution of complaints | <4 weeks | 100% | NA | NA |

*Details pertaining to these are obtained through operator assisted drive tests. Results of the drive tests are explained in greater detail in critical findings

** Methodology not in line with QoS ■ Figures provided on All India basis ■ Not meeting the benchmark B'mark = TRAI Benchmark, DNA = Details not available

Annexure-2

Service provider performance report based on one month data verification – Basic (Wireline) Services

| S.no | Parameters | B'mark | BSNL |
|----------|--|----------|--|
| 1 | Provision of telephone after registration of demand | | |
| 1.1 | Connections completed within 7 days | 100% | 58% |
| 2 | Fault incidence/clearance statistics | | |
| 3 | Fault incidences(No. of faults/100 subscribers/month) | <3 | 9 |
| 3.1 | Faults repaired within 24 hours | >90% | 44% |
| 3.2 | Faults repaired within three working days | 100% | 72% |
| 4 | Mean time to Repair (MTTR) | <8 hours | 27 |
| 5 | Call Completion Rate (CCR) | >55% | 61% |
| 6 | Metering and billing credibility | | |
| 6.1 | Billing complaints per 100 bills issued | <0.1% | 0.10% |
| 6.2 | %age of billing complaints resolved within 4 weeks | 100% | 100% |
| 7 | Customer care/helpline promptness | | |
| 7.1 | <u>Shift requests attended</u> | | |
| | Shift requests attended within 3 days | 95% | 60% |
| 7.2 | <u>Closure request attended</u> | | |
| | Closure within 24 hours | 95% | 95% |
| 7.3 | <u>Supplementary (additional) service requests attended</u> | | |
| | Additional facility provided within 24 hours | 95% | 87% |
| 8 | Response time to customer for assistance | | |
| 8.1 | % age call answered through IVR in 20 seconds | 80% | Details Not Available at the exchanges |
| | % age call answered through IVR in 40 seconds | 100% | |
| 8.2 | % age calls answered by operator in 60 seconds | 80% | 77% |
| | % age calls answered by operator in 90 seconds | 95% | 98% |
| 9 | Time taken for refund of deposits after closure | | |
| 9.1 | %age cases where refund received within 60 days | 100% | NA |

{*Note: For BSNL data pertains to the sample 5% of exchanges audited during the period of to September to November 2008, whereas for rest of the operators figures pertain to all the exchanges present in the circle}

** Methodology not in line with QoS

■ Figures provided on All India basis

■ Not meeting the benchmark

B'mark = TRAI Benchmark, DNA = Details not available

Annexure-3

Service provider performance report based on one month data Verification – Broadband Services

| S.No | Parameters | B'mark | BSNL |
|------|---|----------|----------------------------------|
| 1 | Service provisioning uptime | | |
| 1.1 | Total connections registered | | 420 |
| 1.2 | Percentage connections provided within 15 days | 100% | 100% |
| 2 | Fault repair restoration time | | |
| 2.1 | Total number of faults registered/calls made | | 460 |
| 2.2 | Percentage faults repaired by next working | > 90% | 95% |
| 2.3 | Percentage faults repaired within three | 99% | 100% |
| 3 | Billing performance | | |
| 3.1 | Total bills generated | | 17668 |
| 3.2 | Billing complaints per 100 bills issued | <2% | 0.11% |
| 3.3 | %age of billing complaints resolved within 4 weeks | 100% | 100% |
| 3.4 | Time taken for refund of deposits after closure | 100% | No Cases |
| 4 | Customer care/helpline assessment | | |
| 4.1 | Percentage calls answered within 60 seconds | > 60% | 98% |
| 4.2 | Percentage calls answered within 90 seconds | >80% | 100% |
| 5 | Bandwidth utilization/Throughput | | |
| 5.1 | Total number of intra network links tested | | 23 BRAS, TI 24, T2624,DSLAM 5960 |
| 5.2 | Total number if intra network links crossing over | | 0 |
| | Upstream Bandwidth (ISP Node to NIXI/NAP/IGSP) | | |
| 5.3 | Total number of upstream links | | 141 |
| 5.4 | Number of upstream links > 90% | | 8 |
| 5.5 | Percentage bandwidth utilised on upstream links | <80% | 70% |
| 6 | Broadband download speed | >80% | |
| 7 | Service availability/uptime | >98% | Complied |
| 8 | Packet loss | <1% | 0% |
| 9 | Network Latency | | |
| 9.1 | POP/ISP Node to NIXI to IGSP | <120msec | <120 |
| 9.2 | ISP node to NAP port | <350msec | Complied |

** Methodology not in line with QoS

Figures provided on All India basis

Not meeting the benchmark

B'mark = TRAI Benchmark, DNA = Details not available