Telecom Regulatory Authority of India

The Indian Telecom Services
Performance Indicators April– June 2008

7th October 2008

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INTRODUCTION

1.1 This report presents the growth trends for the telecom services in India for the quarter ending **June 2008.** This report provides a broad perspective on the Telecom Services to serve as a reference document for various stakeholders, research agencies and analysts. Under the Unified Access Service (UAS) Regime, the details of subscriber base under wireless services combine both GSM & CDMA (WLL(F) + WLL(M)) technologies. The Executive Summary of various Telecom Services has been given in the beginning followed by 'Performance Indicators at a Glance' showing the growth pattern of Wireline, Wireless, Internet, Broadband and value added services in the first four chapters. Chapter Five includes QoS performance analysis of various service providers. Chapter Six is on performance of Cable TV, DTH & Radio Broadcast services. Financial details of telecom services sector is given in Chapter Seven.

1.2 The report has been compiled on the basis of information received from various telecom service providers. TRAI collects performance-based data from various service providers on quarterly basis to monitor the growth trends in the telecom sector.

1.3 This performance indicator report is also available on TRAI's website (http://www.trai.gov.in/Reports_list_year.asp). Any suggestion pertaining to this may please be addressed to S. K. Gupta, Advisor (CN), TRAI; Tel. +91-11-23217914, Fax. +91-11-23211998 and e-mail: skgupta@trai.gov.in or guptask61@gmail.com

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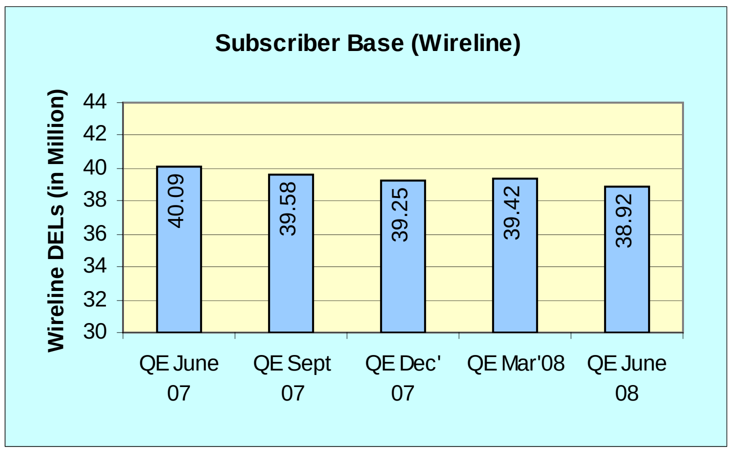
EXECUTIVE SUMMARY

A. Wireline Services

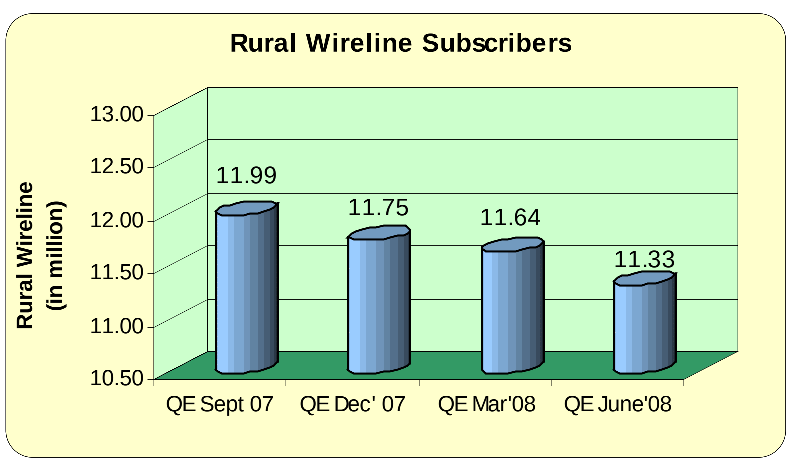
Wireline services subscriber base stood at 38.92 million in quarter ending June 2008 as compared to 39.42 million in quarter ending March 2008.

Chart –I : Subscriber Base (Wireline)



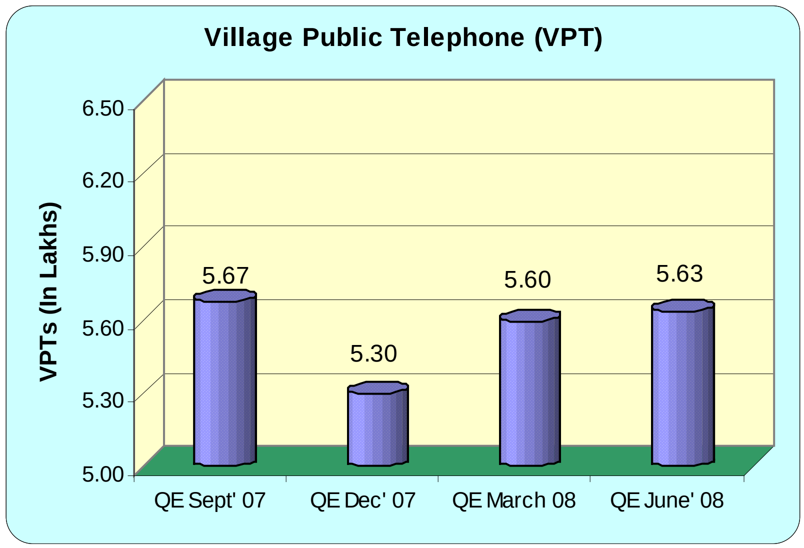
Rural Wireline Subscriber base stood at 11.33 million in quarter ending June 2008 as compared to 11.64 million in quarter ending March 2008.

Chart- II : Rural Wireline Subscribers



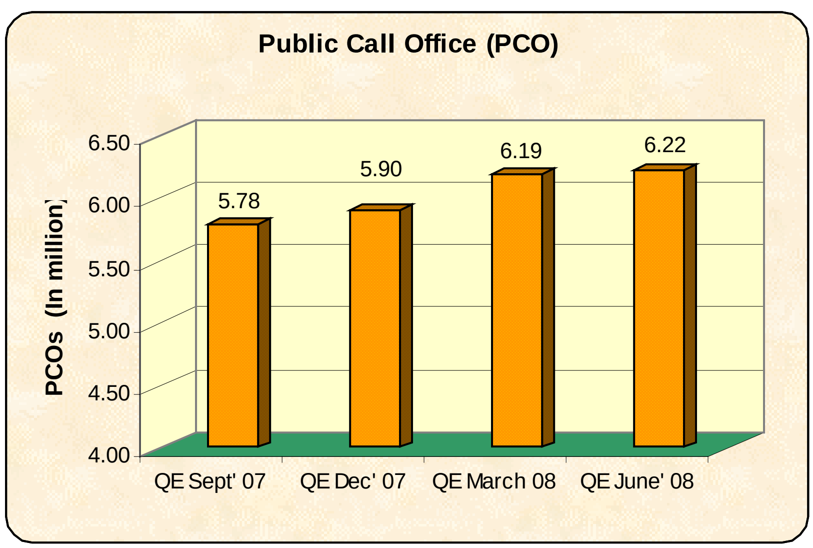
Number of VPTs have increased from 5.60 lakhs in quarter ending March 2008 to 5.63 lakhs in quarter ending June 2008.

Chart –III : Village Public Telephone



Number of Public Call Offices (PCOs) have increased from 6.19 million in quarter ending March 2008 to 6.22 million in quarter ending June 2008.

Chart –IV : Public Call Office



B. Wireless Services

The Wireless subscribers have reached to 286.87 million as on 30th June 2008 as against 261.07 million subscribers in the previous quarter. During this quarter 25.80 million wireless subscribers were added.

Chart –V : Wireless Subscribers

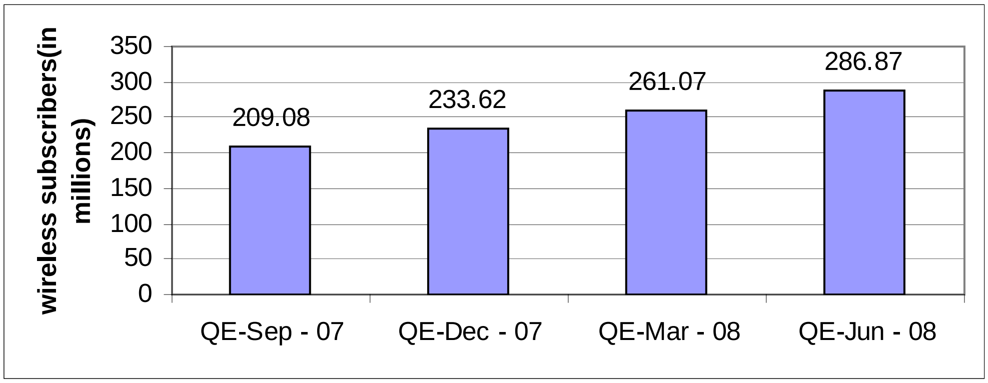
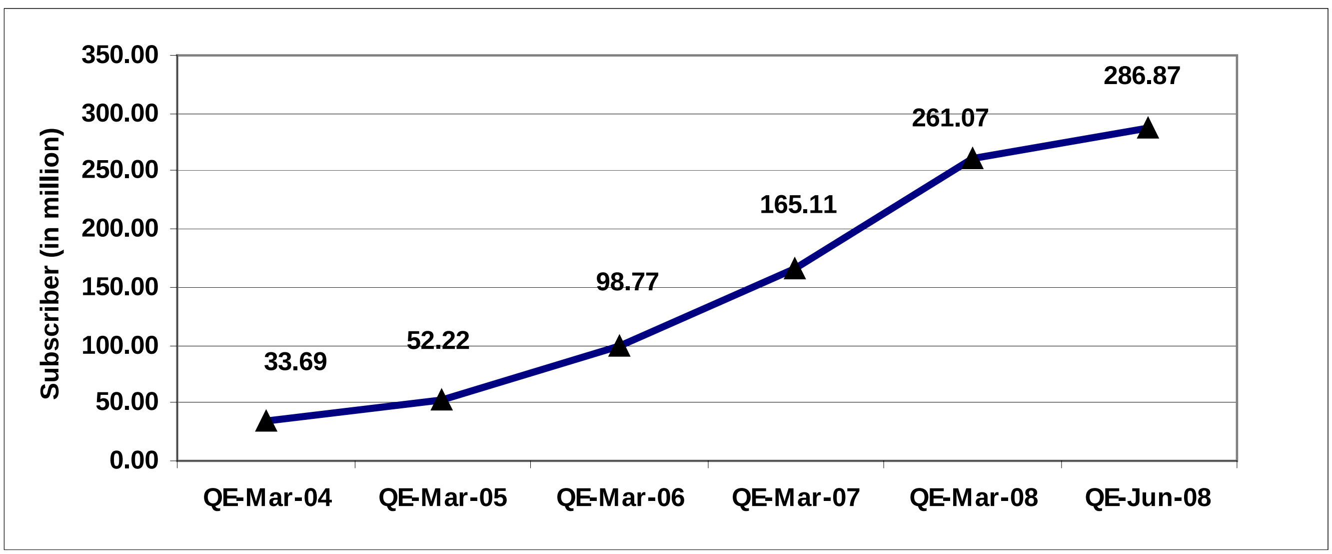


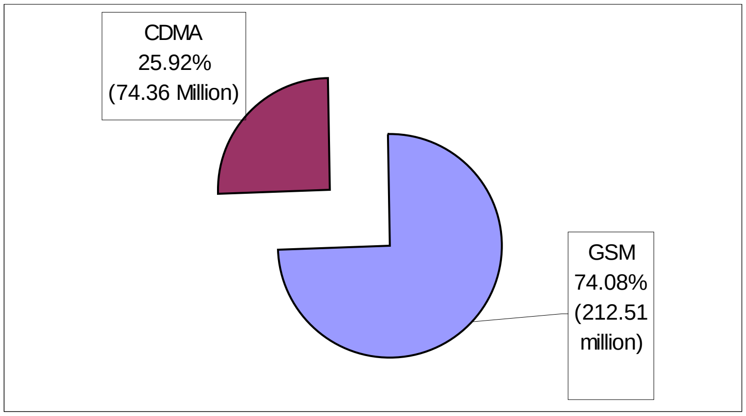
Chart –VI: Total Subscriber Base (Wireless)



(i) Technology-wise Wireless Market Share

There are 212.51 million GSM subscribers (74.08%) and 74.36 million CDMA subscribers (25.92%) at the end of June 2008.

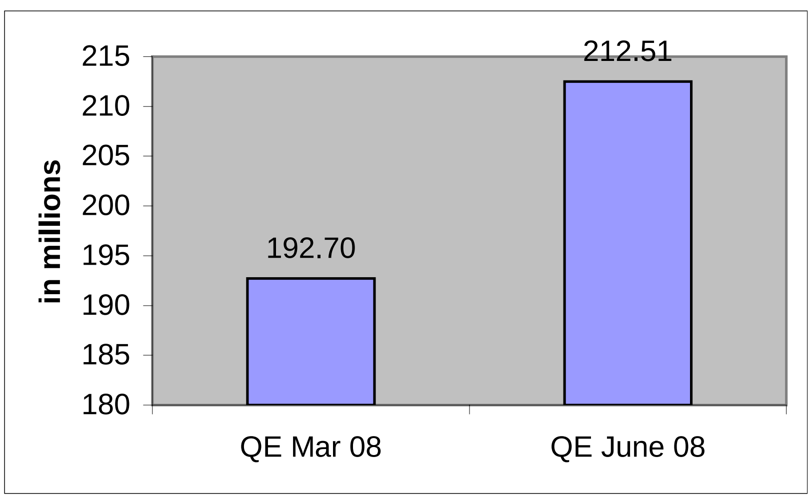
Chart –VII : Technology wise Wireless Market Share



(ii) GSM

The GSM subscribers base has reached 212.51 million in the quarter ending June 2008 as against 192.70 million at the end of the previous quarter.

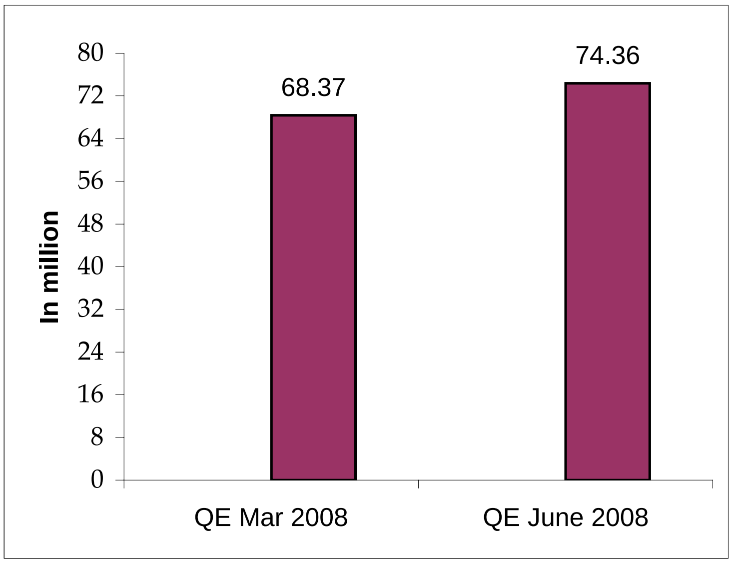
Chart –VIII : GSM Subscriber Growth



(iii) CDMA

The CDMA subscribers base has reached 74.36 million in the quarter ending June 2008 as against 68.37 million at the end of the previous quarter.

Chart – IX : CDMA Subscriber Growth



(iv) Average Revenue Per User (ARPU), Minutes of Usage (MoU) etc.

(a) GSM – Full Mobility Service

- The all India blended ARPU per month has declined by 9.3% from Rs. 264/- in March 2008 to Rs. 239/- in June 2008.
- ARPU for postpaid service has shown a decline of 5.9% from Rs. 638/- in March 2008 to Rs. 600/- in June 2008. Prepaid service has also shown a decline in ARPU of 8.9% from Rs. 224/- in March 2008 to Rs. 204/- in June 2008.
- Total MOU per subscriber has increased from 493/-in March 2008 to 505/- in June 2008, thereby showing an increase of 2.55% as against 6.23% in March 2008. There is thus a drop in the rate of growth of total MOU.
- Outgoing MOUs continue to grow at a higher rate (3.92%) as compared to incoming MOUs (1.30%).
- Individually, both for postpaid and prepaid, Metros continue to have lowest outgoing MOU per subscriber as compared to other circle categories.

- Overall ratio of incoming-outgoing MOUs has been 51:49 for GSM services. For postpaid, ratio of incoming-outgoing minutes is 45:55 and for prepaid segment, it is 53:47.
- Outgoing SMS per subscriber continued to decline. Rate of decline has doubled to 14.5% in the quarter under review from a 7% decline in the quarter ending March 2008.

Chart- X : Key Indicators for GSM

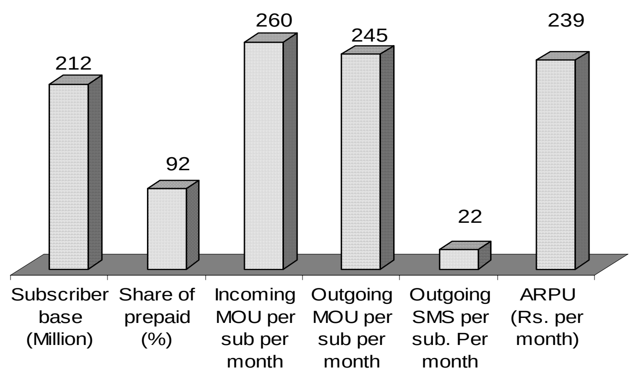


Chart –XI : Variation in Key Indicators over Last Quarter

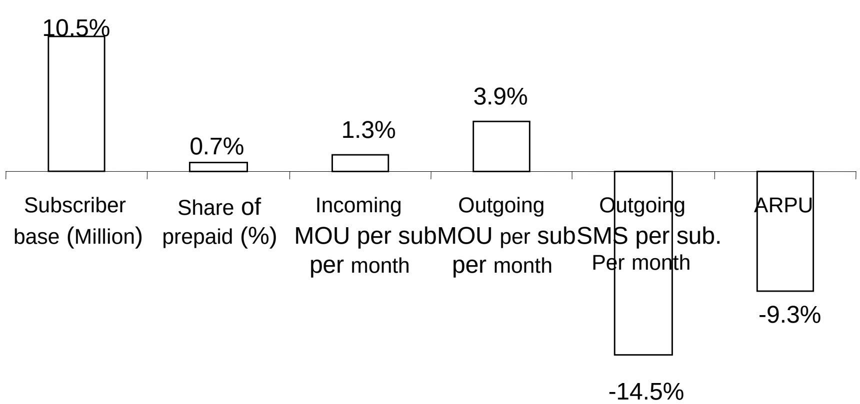
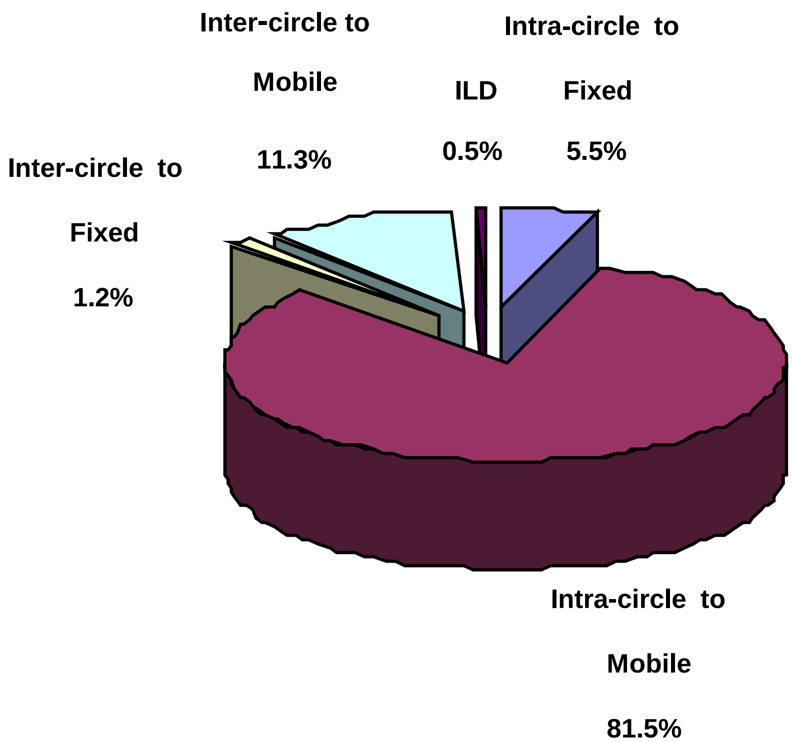


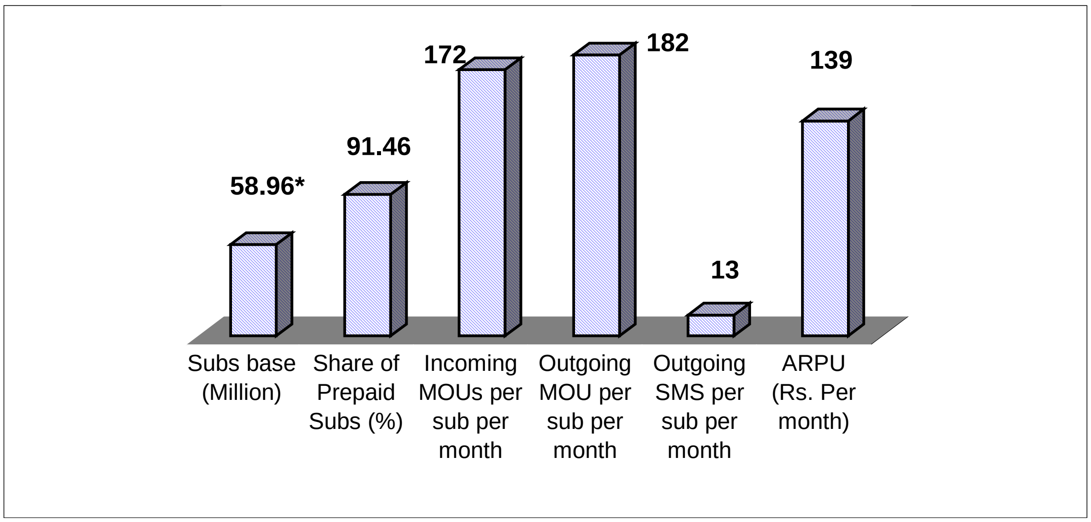
Chart- XII : GSM Originated Traffic- distribution by terminating network



(b) CDMA (Full Mobility)

- All India blended ARPU (per month) for the quarter ending June 2008 is Rs.139/- as compared to Rs. 159/- for the quarter ending March 2008 registering a decrease of 12.57%.
- All India Total Blended MOU per subscriber per month has shown a decline from 364 minutes for the quarter ending March 2008 to 354 minutes for the quarter ending June 2008.

Chart – XIII : Key Indicators for CDMA



- Does not include WLL(F) & WLL(M) subscribers

Chart – XIV: Variation in Key Indicators over last quarter

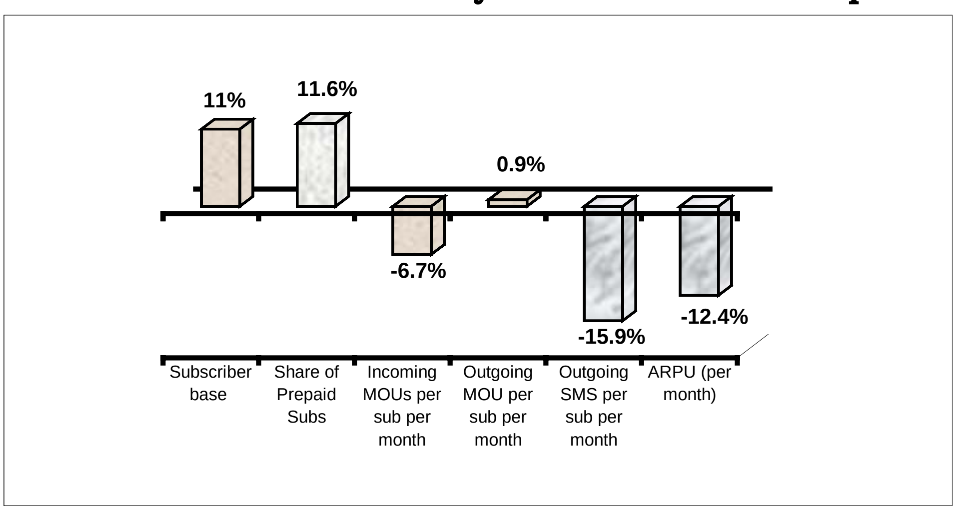
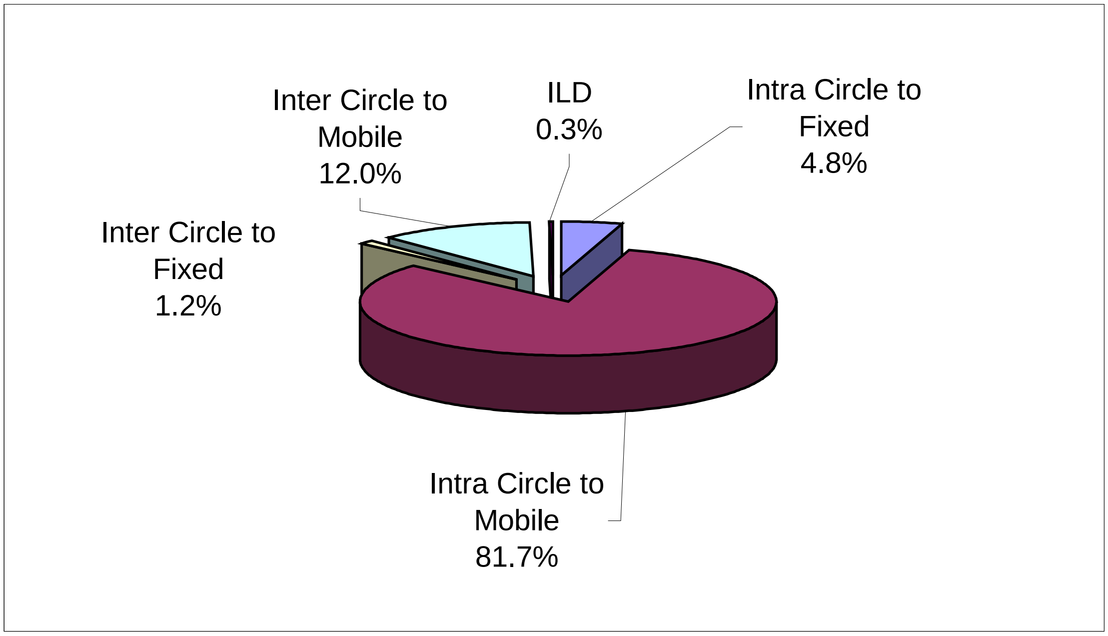


Chart – XV : CDMA Originated Traffic- distribution by terminating network

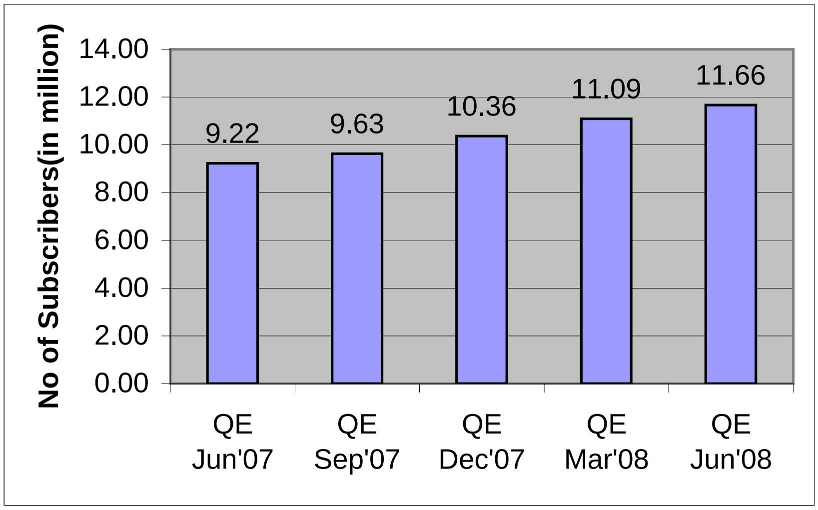


C. Internet Services

There are 11.66 million Internet subscribers at the end of June 2008 as compared to 11.09 million at the end of March 2008 registering a growth of 5.09%. This growth rate is less than the growth rate of 7.08% at the end of March 2008.

Besides above, there are 75.97 million wireless data subscribers at the end of June 2008 (capable of accessing data services including internet through mobile handsets (GSM/ CDMA)).

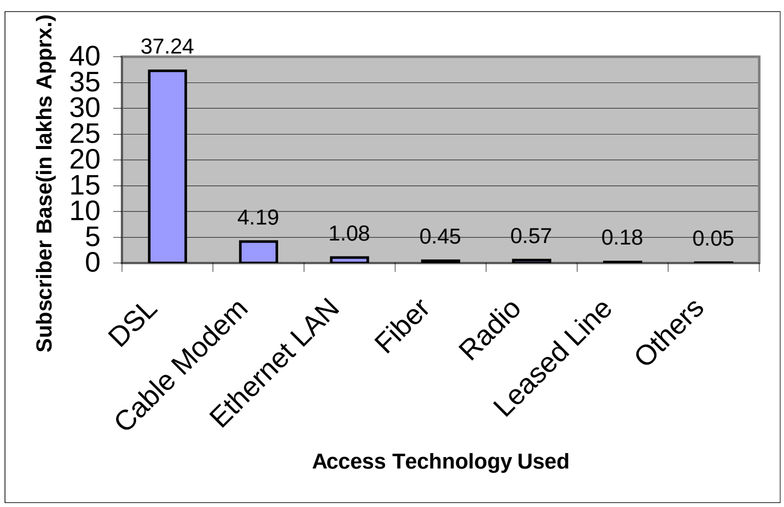
Chart –XVI : Internet Subscriber Base



i) **Broadband Subscriber Growth** - The number of Broadband subscribers (with a download speed of 256 Kbps or more) was 4.38 million at the end of June 2008 as compared to 3.87 million at the end of March 2008. The growth rate of broadband subscribers in this quarter is 13.18%.

ii) **Broadband Subscribers Share (Technology wise) –** Out of total 4.38 million broadband subscribers, 3.72 million are DSL based; 0.42 million Cable Modem; 0.11 million Ethernet LAN; 0.045 million Fiber; 0.057 million Radio, Leased Line 0.018 million and 0.005 million use other technologies.

Chart – XVII : Technology Trends for Broadband



D. Quality of Service Performance

(a) Wireline Services

This report covers 78 licences providing basic services. In this quarter the performance of the Basic Service Providers have improved as compared to the previous quarter in respect of parameters like Provision of Telephones, Faults repaired by next working day, Mean Time to Repair, Call Completion Rate, Metering & Billing credibility, Customer Care Services (Shifts, Additional Facilities), Response time to the customer for assistance - %age of calls answered (Voice to voice) (i) within 90 sec = 95% & Time Taken to Refund

However, the performance of Basic Service Providers have deteriorated in this quarter, as compared to the previous quarter, in respect to parameters like Faults incidences (the benchmark for this parameter which was earlier <5 has now become <3 w.e.f. quarter ending June'08 as per the Regulation), Customer Care Services (Closures), Response time to the customer for assistance - %age of calls answered (a) Electronically: within 40 sec = 95% (b) Voice to voice: within 60 sec = 80%

The performance of the Basic Service Providers remained at same level as compared to the previous quarter in respect of the parameter like Grade of Service, Response time to the customer for assistance - %age of calls answered (Electronically) within 20 sec = 80%.

The summary of performance of the service providers who have not met the benchmarks in this quarter as compared to previous quarter is given in the table –1.

Table 1: Summary of Performance of Wireline Service Providers

Sr. No.	Parameters	Benchmark	No. of operators not meeting the benchmarks			
			March, 2008		June, 2008	
			Out of 78 In Nos	Out of 78 In %age	Out of 78 In Nos	Out of 78 In %age
1	**Provision of Telephones after registration of demand**	100% within 7 Days	65	83.33%	52	66.67%
2	**Fault incidences per 100 subs/month**	<5 w.e.f. June '08 (<3)	25	32.05%	46	58.97%
3	**Fault repaired by next working day**	>90%	18	23.08%	17	21.79%
4	**MTTR**	<8Hrs	25	32.05%	21	26.92%
5	**Grade of Service (Junction between local exchange)**	2/1000	2	2.56%	2	2.56%
6	**Call Completion Rate (in local network)**	>55%	7	8.97%	4	5.13%
7	**Metering & billing credibility - % of bills**	<0.1%	5	6.41%	1	1.28%
8	**Customer Care Service (95% of requests)**					
(i)	Shifts	<3 Days	21	26.92%	18	23.08%
(ii)	Closures	<24 hrs.	7	8.97%	8	10.26%
(iii)	Additional Facilities	<24 hrs.	15	19.23%	9	11.54%
9	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically)					
	Within 20 sec = 80%	80%	1	1.28%	1	1.28%
	Within 40 sec = 95%	95%	1	1.28%	2	2.56%
(ii)	%age of calls answered by operator (voice to voice)					
	Within 60 sec = 80%	80%	1	1.28%	2	2.56%
	Within 90 sec = 95%	95%	9	11.54%	8	10.26%
10	**Time taken for refund of deposits after closures**	100% within 60 days	8	10.26%	2	2.56%

(b) Wireless Service

This report covers performance of 93 GSM Cellular Mobile Licensees and 44 CDMA service Licensees vis-à-vis the QoS benchmarks prescribed by TRAI. All Cellular Mobile Service Providers have achieved prescribed TRAI benchmark in respect of the following parameters:-

1. Accumulated down time of Community isolation
2. Call Drop Rate
3. Response time to the customer for assistance
   (i) %age of calls answered (electronically) within 20 sec.

The performance has improved in this quarter as compared to the previous quarter in respect of the parameters like Blocked Call rate (SDCCH/paging channel congestion), response time to the customer for assistance, %age of calls answered (voice to voice) within 90 sec & Complaints per 100 bills issued.

The performance has deteriorated in this quarter as compared to the previous quarter related to the parameters like Call Set-Up Success Rate (Within Licensee's Own network), Service access Delay, %age of Connections with good voice quality, response time to the customer for assistance & %age of calls answered (electronically) within 40 second.

The performance of the Cellular Mobile Service Providers is at same level as compared to the previous quarter in respect of the parameter of Blocked Call rate (TCH congestion), Response time to the customer for assistance – %age of calls answered (voice to voice) within 60 sec., %age of Complaints resolved within 4 weeks and Period of all refunds/payment due to customers from the date of resolution of complaints. In respect of the parameters of Accumulated down time of Community isolation, Call Drop Rate, Response time to the customer for assistance – (i) %age of calls answered (electronically) within 20 seconds = 80%, all the operators met the benchmark on the lines of previous quarter.

The comparative statement of the key parameters is given in the table 2:-

Table 2 : Summary of Performance of Wireless Service Providers

Sr.No	Parameters	Benchmarks	No. Of Operators Not Meeting The Benchmarks			
			Quarter Ending March, 2008		Quarter Ending June, 2008	
			Out Of 134 (Nos.)	Out Of 134 (in %)	Out Of 134 (Nos.)	Out Of 134 (in %)
1	**Accumulated down time of Community isolation**	**<24 hrs**	0	0.00%	0	0.00%
2	**Call Set-Up Success Rate (Within Licensee's Own network)**	**>95%**	2	1.49%	5	3.73%
3	**Service access delay**	**<15 Sec**	0	0.00%	2	1.49%
4	**Blocked call rate** (i) SDCCH/paging channel congestion	**<1%**	9	6.72%	6	4.48%
	(ii) TCH Congestion	**<2%**	12	8.96%	12	8.96%
5	**Call drop rate**	**<3.0%**	0	0.00%	0	0.00%
6	**%age of Connections with good voice quality**	**>95%**	0	0.00%	6	4.48%
7	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically); within 20 seconds = 80%	**80%**	0	0.00%	0	0.00%
(ii)	%age of calls answered (electronically); within 40 seconds = 95%	**95%**	0	0.00%	1	0.75%
(iii)	%age of calls answered by operator (voice to voice); within 60 seconds = 80%	**80%**	22	16.42%	22	16.42%
(iv)	%age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	52	38.81%	47	35.07%
8	**Complaints per 100 bills issued**	**<0.1%**	6	4.48%	2	1.49%
9	**% Of complaints resolved with 4 weeks**	**100%**	1	0.75%	1	0.75%
10	**Period of all Refunds/Payment due to Customers from the date of resolution of complaints As In (9) above**	**<4 Weeks**	1	0.75%	1	0.75%

NOTE : * M/s Bharti Airtel has submitted a combined PMR for TN & Chennai as the License of M/s Bharti Airtel Chennai circle has been merged with Tamilnadu circle. The Licence of M/s Reliable Internet Service has been merged with Reliance Telecom Ltd, Kolkata. So, total no. of Licensees providing PMR is 134.

(c) Broadband Service

Regulations on 'Quality of Service of Broadband Service Regulations 2006' came into force with effect from 1st Jan 2007. Total number of the Service providers providing Broadband was 72 in last quarter (March, 2008). No new service provider is added in this quarter.

This report covers performance of 13 Service Providers providing Broadband vis-à-vis the QoS benchmarks prescribed by TRAI.

E. Broadcasting and Cable Services

- Based on the data received from various Multi System Operators (MSOs) across the country, the maximum number of Free-to-Air (FTA) and Pay Channels being carried in the cable networks are **151** and **99** respectively. There are **124** pay channels as reported by **17** broadcasters/their distributors at the Quarter ending June, 2008.
- Upto quarter ending March' 2008, there were 205 FM Radio stations in operation. During the quarter ending June, 2008, 31 more FM Radio Stations came into operation. Now, at the end of quarter ending June 30, 2008, **236** FM Radio stations are in operation.
- No DTH license was issued during the quarter ending June 2008. Therefore, at present, apart from free to air DTH service of Doordarshan, there are 6 private DTH licensees. Out of these 6 licensees, 3 licensees are offering pay DTH services to the customers as on 30.06.2008, while others are in the process of rolling out their services.
- There were 49 Community Radio Station licensee and out of these, 35 were operational at the quarter ending March 2008. In the Quarter Ending June, 2008, 2 more licenses were issued. Now, at the quarter ending June, 2008, out of 51 licensees of community radio stations, 35 stations are in operation.

- There were 607883 number of set top boxes (STBs) installed in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai at the end of March 2008. Now, at the quarter ending June 2008, the STB number has increased to 681650 in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai.

F. Financial Details of the Telecom Network:

- The Gross Revenue of the Telecom Service Sector for the Ist Quarter (April – June 2008) of the financial year 2008-09 was Rs.35311 Crores as against Rs.35770 Crores for the previous quarter thereby showing decrease by 1.30%. The Adjusted Gross Revenue (AGR) for the Quarter under review is placed at Rs.26,990 Crores as against Rs.27845 Crores for the previous quarter thereby showing decrease of 3.17%.

- The Gross Revenue and AGR of the Public Sector units in Telecom Sector is Rs.9756 Crores and Rs.8467 Crores respectively as against Rs.12233 Crores and Rs.10417 Crores for the previous quarter.

- The Gross Revenue and AGR of the Private Sector enterprises in Telecom Sector is placed at Rs.25555 Crores and Rs.18524 Crores respectively as against Rs.23537 Crores and 17427 Crores for the previous quarter.

- The Share of Public and Private sector enterprises in the total AGR from Telecom Service is 31.37% and 68.63% respectively as against 37.41% and 62.59% in the previous quarter.

- Average % of License Fee paid by Telecom Service Providers to AGR is 8.58% and Average % of Spectrum Charges to AGR is 2.76%.

- Excluding ISPs, the Pass Thru as % of GR for the ILD services is highest at 51.51% followed by NLD at 26.50% and Access at 20.97%.

G. Performance Indicators at a Glance for Quarter ending 30th June 2008

Table 3: Growth of Wireline & Wireless Services:-

	QE Jun' 2007	QE Sep' 2007	QE Dec' 2007	QE Mar' 2008	QE Jun' 2008	%age growth over Jun' 2007 (12 months)	%age growth over Sep' 2007 (9 months)	%age growth over Dec' 2007 (6 months)	%age growth over Mar' 2008 (3 months)
1) Subscriber's Base (in million)									
i) Wireline	40.09	39.58	39.25	39.42	38.92	-2.92	-1.67	-0.84	-1.27
ii) Wireless	184.92	209.07	233.62	261.07	286.87	55.13	37.21	22.79	9.88
Gross Total	**225.01**	**248.65**	**272.87**	**300.49**	**325.79**	**44.79**	**31.02**	**19.39**	**8.42**
2) Traffic (MOU) (minutes of use/ sub/month)									
Wireless									
i) GSM	476	462	464	493	505	6.09	9.31	8.84	2.43
ii) CDMA	462	413	375	364	354	-23.38	-14.29	-5.60	-2.75
3) ARPU (Rs./sub/ month)									
Wireless									
i) GSM	297	275	261	264	239	-19.53	-13.09	-8.43	-9.47
ii) CDMA	206	173	176	159	139	-32.52	-19.65	-21.02	-12.58
4) Teledensity									
Population in million (Estimated)	1133	1137	1143	1146	1150				
i) Wireline	3.54	3.48	3.43	3.44	3.38	-4.51	-2.67	-1.45	-1.74
ii) Wireless	16.32	18.39	20.44	22.78	24.95	52.87	35.67	22.04	9.52
Gross Total	**19.86**	**21.87**	**23.87**	**26.22**	**28.33**	**42.65**	**29.54**	**18.68**	**8.04**

Table 4: Growth of Internet & Broadband Services:-

	QE Jun' 2007	QE Sep' 2007	QE Dec' 2007	QE Mar' 2008	QE Jun' 2008	% age growth over Jun' 2007 (12 months)	% age growth over Sep' 2007 (9 months)	%age growth over Dec' 2007 (6 months)	%age growth over Mar' 2008 (3 months)
1) Subscriber's Base (in million)									
i) Internet	9.22	9.63	10.36	11.09	11.66	26.46	21.08	12.55	5.14
ii) Wireless Internet *	38.02	46.37	57.83	65.50	75.97	99.82	63.83	31.37	15.98
ii) **Broadband Connections** (>=256 Kbps download speed)	2.42	2.67	3.13	3.87	4.38	80.84	64.04	39.94	13.18
2) Minutes of Use (Dialup Internet) (MOU/ subs/month)	195	206	210	220	225	15.38	9.22	7.14	2.27
3) ARPU (Dialup Internet) (Rs/subs/month)	203	200	210	220	225	10.84	12.50	7.14	2.27

* Accessing Internet through wireless (GSM & CDMA) networks

%age Growth figures are calculated by rounding the actual figures to nearest million. These may vary with values given in the subsequent chapters of this report.

C. Performance of service providers during the quarter: -

Table 5: Wireline Subscribers Base(in Million)

1) Wireline Service Providers	QE Jun' 2007	QE Sep' 2007	QE Dec' 2007	QE Mar' 2008	QE Jun' 2008	%age growth over Jun' 2007 (12 months)	%age growth over Sep' 2007 (9 months)	%age growth over Dec' 2007 (6 months)	%age growth over Mar' 2008 (3 months)
BSNL	32.91	32.22	31.71	31.55	30.87	-6.20	-4.19	-2.65	-2.16
MTNL	3.67	3.63	3.60	3.68	3.63	-1.09	0.00	0.83	-1.36
Bharti	1.97	2.08	2.18	2.28	2.39	21.32	14.90	9.63	4.82
Reliance	0.64	0.70	0.78	0.87	0.95	48.44	35.71	21.79	9.20
Tata/ Hughes	0.58	0.63	0.67	0.72	0.77	32.76	22.22	14.93	6.94
HFCL	0.16	0.16	0.15	0.15	0.15	-6.25	-6.25	0.00	0.00
Shyam	0.16	0.16	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Total	**40.09**	**39.58**	**39.25**	**39.42**	**38.92**	**-2.92**	**-1.67**	**-0.84**	**-1.27**

Table 6: Wireless Subscriber Base (in Million)

Service Providers	QE Jun' 2007	QE Sep' 2007	QE Dec' 2007	QE Mar' 2008	QE Jun' 2008	%age growth over Jun' 2007 (12 months)	%age growth over Sep' 2007 (9 months)	%age growth over Dec' 2007 (6 months)	%age growth over Mar' 2008 (3 months)
Bharti	42.70	48.88	55.16	61.98	69.38	62.48	41.94	25.78	11.94
Reliance	31.88	36.32	40.96	45.79	50.79	59.32	39.84	24.00	10.92
Vodofone	30.75	35.66	39.86	44.13	49.20	60.00	37.97	23.43	11.49
BSNL	32.05	34.13	36.81	40.79	41.96	30.92	22.94	13.99	2.87
Tata Tele	17.32	19.50	21.74	24.33	26.33	52.02	35.03	21.11	8.22
Idea	16.13	18.67	21.05	24.00	27.19	68.57	45.63	29.17	13.29
Aircel	6.77	8.04	9.43	10.61	11.92	76.07	48.26	26.41	12.35
Spice	3.17	3.48	3.80	4.21	4.55	43.53	30.75	19.74	8.08
MTNL	2.81	2.99	3.20	3.53	3.72	32.38	24.41	16.25	5.38
BPL	1.09	1.15	1.24	1.29	1.38	26.61	20.00	11.29	6.98
HFCL	0.15	0.15	0.25	0.30	0.34	126.67	126.67	36.00	13.33
Shyam	0.10	0.10	0.10	0.11	0.11	10.00	10.00	10.00	0.00
Total	**184.92**	**209.07**	**233.62**	**261.07**	**286.87**	**55.13**	**37.21**	**22.79**	**9.88**

CHAPTER ONE

PERFORMANCE OF WIRELINE SERVICES

1.1 Subscribers Base: -

1.1.1 The Wireline services were provided by 5 licensed private operators in addition to incumbents BSNL and MTNL as on 30th June 2008. List of Wireline Service providers along with their areas of operation is given in the following Table.

Table 7

Sl. No.	Name of the Service Provider	Area of Operation
1	BSNL	All India except Delhi & Mumbai
2	MTNL	Delhi & Mumbai
3	Bharti Airtel Ltd	Andhra Pradesh, Delhi, Gujarat, Haryana, Karnataka, Kerala, Kolkata, Madhya Pradesh, Maharashtra, Mumbai, Punjab, Rajasthan, Tamil Nadu(included Chennai circle), UP-East,UP-West (including Uttaranchal) and West Bengal.
4	Tata Teleservices (Maharashtra) Ltd.	Maharashtra, Mumbai
5	Tata Teleservices Ltd.	Andhra Pradesh, Bihar, Chennai, Delhi, Gujarat, Haryana, Himachal Pradesh, Karnataka, Kerala, Kolkata, Madhya Pradesh, Orissa, Punjab, Rajasthan, Tamil Nadu, UP(E), UP(W) including Uttaranchal and West Bengal
6	HFCL Infotel Ltd	Punjab
7	Shyam Telelink Ltd	Rajasthan
8	Reliance Communications Ltd.	Andhra Pradesh, Bihar, Chennai, Delhi, Gujarat, Haryana, Himachal Pradesh, Karnataka, Kerala, Kolkata Madhya Pradesh, Maharashtra, Mumbai, Orissa, Punjab, Rajasthan, Tamil Nadu, UP(E), UP(W) and West Bengal

1.1.2 Market Share of Wireline subscriber base.

As on 30th June 2008, the total subscriber base of fixed (Wireline) lines stood at 38.92 million. The incumbents BSNL and MTNL have 79.31% and 9.33% market share respectively in the subscriber base, while all the five private operators together have 11.36% share. The market share of total Fixed (Wireline) lines is shown in the chart below:-

Figure 1.1: Distribution of Market share of Urban + Rural Wireline subscriber

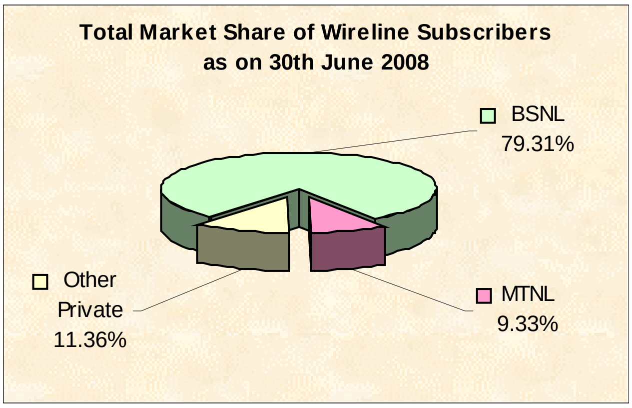


Figure 1.2 : Distribution of Market share of Urban Wireline subscriber

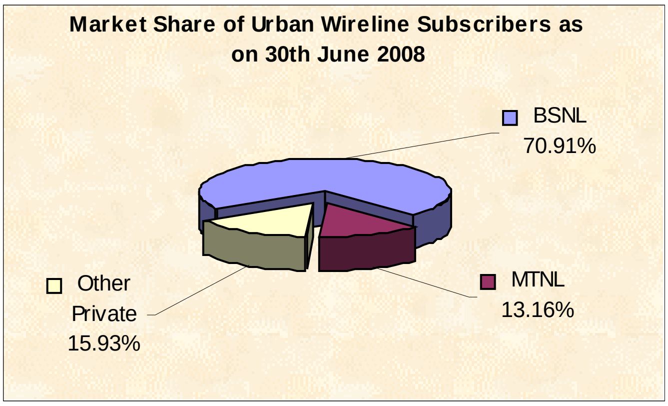
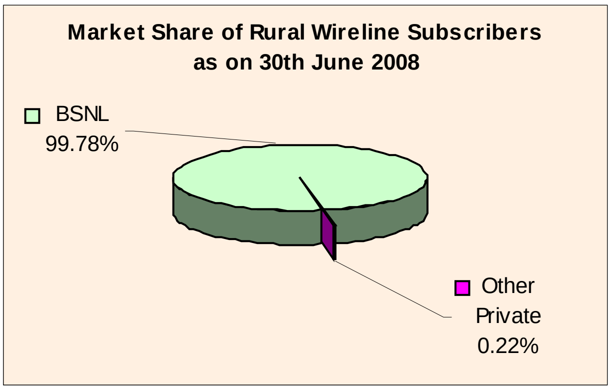


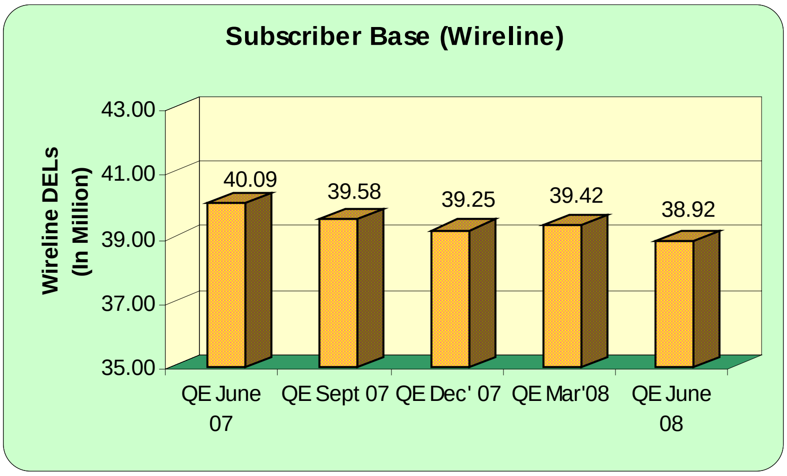
Figure 1.3 : Distribution of Market share of Rural Wireline subscriber



1.1.3 Subscriber Base of Wireline for last five quarters

The subscriber base of the Wireline service sector for last five quarters is depicted below:

Figure 1.4: The subscriber base of the Wireline service sector for last five quarter

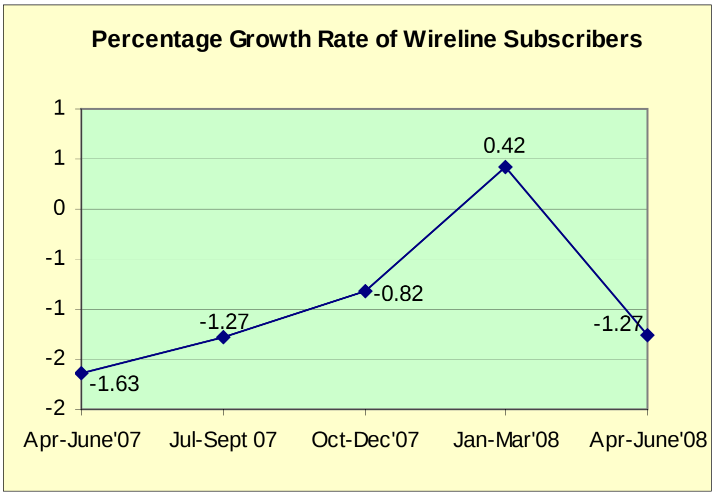


1.1.4 Status of Wireline services

The Fixed (Wireline) subscriber base registered a decrease of 498,722 lines during the quarter ending June' 2008. The net number of fixed (wireline) has decreased to 3,89,17,241 from 3,94,15,963 as on 30th June 2008. The overall percentage of decrease in subscriber base during the quarters is 1.27%.

During the quarter ending 30th June 2008 some service providers have increased their respective wireline subscriber base such as M/s Bharti Airtel Ltd. from 22,83,326 to 23,93,732(+110,406), M/s Tata Teleservices Ltd. (TTL) (including TT(M)L) from 7,22,951 to 772,202 (+49,251), M/s HFCL Infotel Ltd. from 147,595 to 147,755 (+160) and M/s Reliance Communications Ltd. (RCL) from 8,73,969 to 951,615 (+77,646). The reduction in the subscriber base of Wireline during the quarter ending June' 08 reported by M/s BSNL from 3,15,52,296 to 3,08,66,077 (-6,86,219), M/s Shyam Telelink Ltd. from 1,57,456 to 155,675 (-1,781) and M/s MTNL from 36,78,370 to 36,30,185 (-48,185).

Figure 1.5 : Percentage Growth Rate of Wireline Subscribers



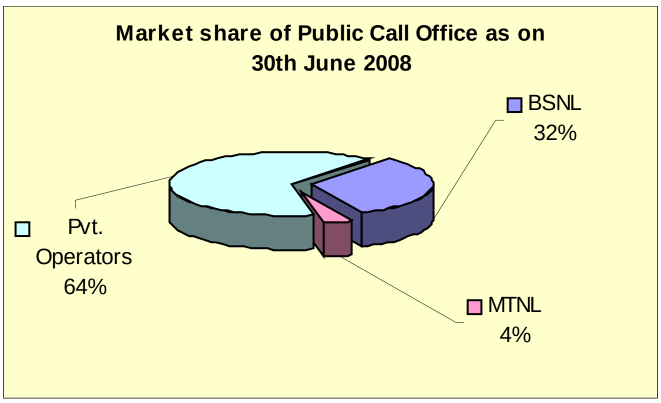
1.2 Other Performance Indicators: -

1.2.1 Public Call Offices:

(i) During the current quarter 35,186 new PCOs have been added. Total number of PCOs in the country as on 30th June 2008 is 62,21,090. The share of BSNL is 19,99,181 i.e. 32% of the total PCOs. The share of MTNL and other private operators combined is 2,34,941 (4%) and 39,86,968 (64%) respectively.

(ii) Operator-wise (BSNL/MTNL/Other Private Operators) market share of PCO is depicted in the chart below. Service area and operator wise details of PCO's are available at Table 1.2.

Figure 1.6 : Market Share of Public Call Office as on 30.06.2008

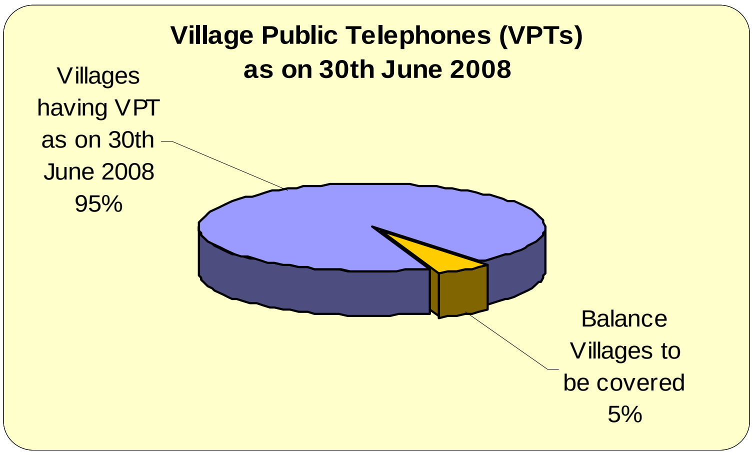


1.2.2 Village Public Telephones (VPT):

There are 5,93,485 villages in India as per census 2001 during the previous quarter ending 31st March 2008 there were 5,59,503 VPTs in the country whereas by the end of this quarter i.e. 30th June 2008, the total number of VPTs have increased to 5,63,494 Thus 3,991 VPTs have increased during the current quarter. The total number of villages left uncovered, are 29,991 as on 30th June 2008.

The status of VPT's is depicted in the Figure 1.7

Figure 1.7 : Village Public Telephones as on 30.06.2008



Circle-wise and Operator-wise details of village public telephones as on 30th June 2008 and addition/deletion during the quarter are available in Table 1.3.

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CHAPTER TWO

PERFORMANCE OF WIRELESS SERVICES

Wireless Subscriber Base reached 286.87 million

PART A

2.1 Details of service providers: - The list of all the Wireless service providers currently providing services along with their licensed service areas is given in table 8 below: -

Table 8

SLNO	Service Provider	Area for which licensed with No.	Area for which not licensed	UASL Service Licensed
1	BSNL/MTNL	All India (23)		
2	Bharti	All India (22)		All India except NE
3	Aircel Group	All India (23)		All India except Chennai & TN
4	Reliance Group	All India (23)		All India except NE & AS
	Reliance Infocomm	All India (except Assam & NE) (21)	Assam & NE	All India except NE & AS
	Reliance Telecom	Kolkata, MP, WB, HP, Bihar, OR, Assam & NE (8)	Delhi, Mumbai, Chennai, MH, Gujarat, AP, KTK, TN, KR, PB, Har, UP (W), UP (E), Raj & J&K	MP, WB, HP, Bihar, OR, Assam & NE
5	Vodafone	All India (23)		UP-W, MP, WB, HP, Bihar, OR, Assam, NE, J&K
6	Tata Teleservices	All India (23)		All India
7	IDEA	All India (22)		Mumbai, Chennai & TN, Kol, KTK, Pb, WB, Bihar, OR, Assam, NE & J&K
8	Shyam Telelink	All India (22)		All India
9	BPL/Loop Telecom Private Ltd	All India (22)		All India except Mumbai
10	M/s Volga Properties Pvt. Ltd., M/s Hudson Properties Ltd., M/s Unitech Infrastructure Pvt. Ltd., M/s Azare Properties Ltd., M/s Aska Projects Ltd., M/s United Builders & Estates Private Ltd., M/s Adonis projects Pvt. Ltd., M/s Nahan Properties P.Lt.	All India (22)		All India
11	Datacom Solutions Pvt. Ltd.	All India except Pb (21)	Punjab	All India except Pb
12	Swan Telecom Pvt. Ltd	Delhi, Mumbai, Mah, Guj, AP, Ktk, KR, Chennai & TN, Punjab, HR, UP (W), UP (E) & Raj (13)	Kol., MP, WB, HP, Bihar, OR, Assam, NE & J&K	All India except Kol., MP, WB, HP, Bihar, OR, Assam, NE & J&K
13	Spice Communications	Delhi, Mah, AP, KTK, Punjab, Har (6)	All India except (Delhi, Mah, AP, KTK, Pb & Har)	Delhi, Mah, AP, KTK, Pb, Har
14	S Tel Ltd	HP, Bihar, Orissa, Assam, NE, J&K (6)	All India except HP, Bihar, OR, Assam, NE, J&K	HP, Bihar, OR, Assam, NE, J&K
15	HFCL	Punjab (1)	All India except Punjab	Punjab

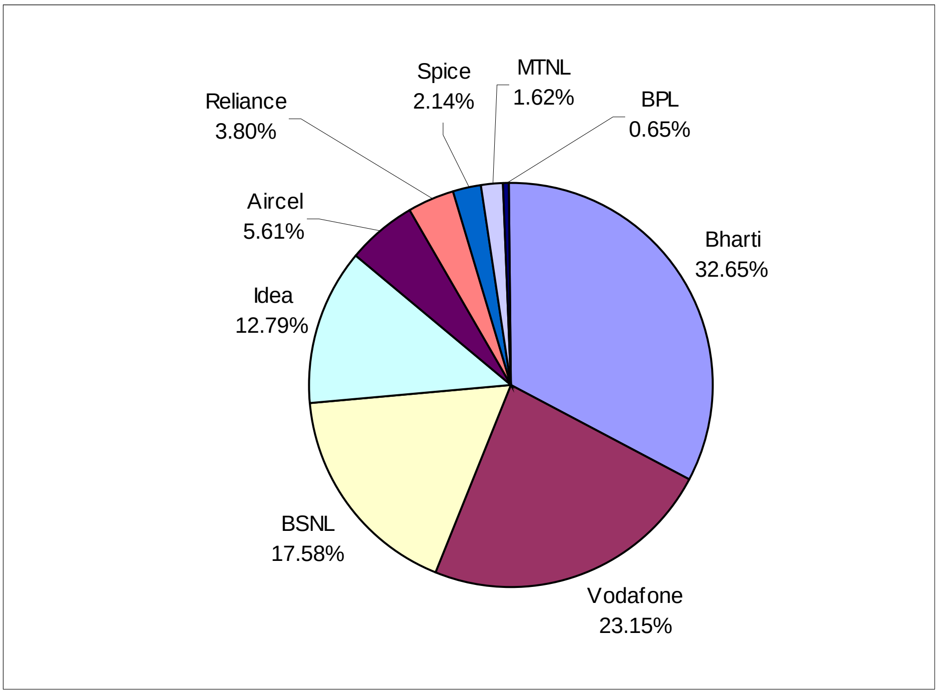
Circle-wise details of all Wireless, Wireline & Unified Access Service providers for the quarter ending June 2008 are given at Annex 2.1 & 2.1 (a).

2.2 Growth of Subscribers Base: -

2.2.1 GSM

The GSM subscribers base has reached 212.51 million in the quarter ending June 2008 as against 192.70 million at the end of the previous quarter. The growth for this quarter is 10.28%. M/s Bharti with 69.38-million subscriber base remains the largest GSM mobile operator followed by M/s Vodafone, M/s BSNL and M/s Idea with subscribers base of 49.20 million, 37.36 million and 27.19 million respectively. The market share of different GSM operators is given below:

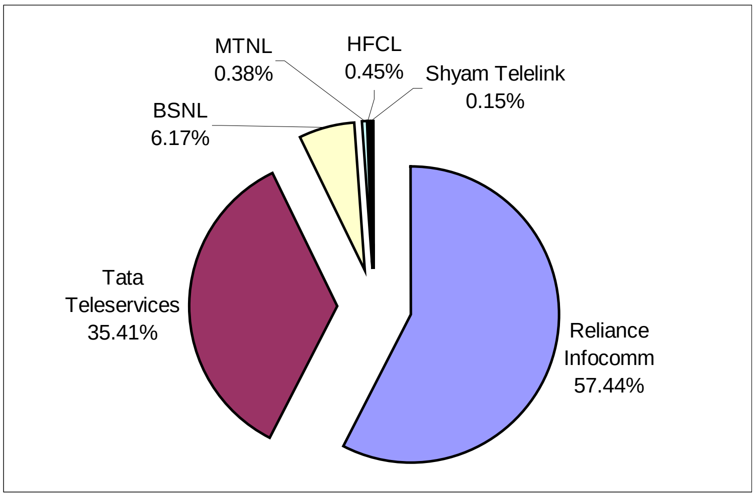
Figure 2.1 : Operator-wise Market Share of GSM service providers as on 30th June 2008



2.2.2 CDMA

The CDMA Subscribers Base has reached 74.36 million during the quarter ending June 2008 as against 68.37 million at the end of March 2008. The growth in this quarter is 8.76% as against 11.37% for the previous quarter. M/s Reliance remains the largest CDMA mobile operator followed by M/s Tata Teleservices and M/s BSNL with subscribers base of 42.71 million, 26.33 million and 4.59 million respectively.

Figure 2.2: Operator-wise Market Share of CDMA Wireless as on 30th June 2008



2.2.3 Wireless Subscriber Base

At the end of June 2008, the Wireless (Mobile and WLL (F)) market has reached 286.87million subscriber mark as against 261.07 million subscribers in the previous quarter.

2.2.4 Addition in Subscribers Base

During this quarter 25.80 million subscribers were added. The total subscriber base of 286.87 million comprises of 212.51 million GSM mobile (74.08%) & 74.36 million CDMA Mobile (25.92%). The growth rate in this quarter is 9.88% as against 11.75% in the previous quarter.

2.2.5 Company wise Market Share

a) M/s Bharti has maintained its 1st position with a subscriber base of 69.38 million. It has market share of 24.18% w.r.t total subscriber base. M/s Reliance is on 2nd position with a total subscribers base of 50.79 million. **During this Quarter M/s Idea captured the 5th position from M/s Tata.** M/s Dishnet Wireless Ltd. has started its services in Kolkata from the month of May 2008.

b) The Wireless operators on the basis of market share are given below: -

Table 9

SLNO	**Wireless Group (with number of Operating Circles)**	**Subscribers Base as on June 08 (In millions)**	**Market Share (in %age)**
1	Bharti (23)	69.38	24.18%
2	Reliance (23)	50.79	17.70%
3	Vodafone (16)	49.20	17.14%
4	BSNL(21)	41.96	14.63%
5	Idea (13)	27.19	9.48%
6	Tata (20)	26.33	9.18%
7	Aircel (10)	11.92	4.16%
8	Spice (2)	4.55	1.59%
9	MTNL(2)	3.72	1.30%
10	BPL(1)	1.38	0.48%
11	HFCL (1)	0.34	0.12%
12	Shyam (1)	0.11	0.04%
	Total	**286.87**	**100.00%**

The details of operator-wise subscribers of GSM and CDMA are given in Table 2.2.

a) Distribution of Subscriber base and market share of Wireless services as on June 2008 among Metros, Circles A to C is given in Table 2.3.

PART B : ARPU and MoU

2.3 GSM (Full Mobility)

2.3.1 Average Revenue Per User (ARPU)

- The all India blended ARPU per month has declined by 9.3% from Rs. 264/- in March-08 to Rs. 239/- in June-08.
- ARPU for postpaid service has shown a decline of 5.9% from Rs. 638/- in March-08 to Rs. 600/- in June-08. Prepaid service has also shown a decline in ARPU of 8.9% from Rs. 224/- in March-08 to Rs. 204/- in June-08.
- As per the revenue reports furnished by the service providers, revenue from subscribers adjusted for interconnect charges, is about Rs. 14,470 Crores in the quarter ending June-08 as against Rs. 14,329 Crores in the March-08 quarter, thereby showing a growth of 1%.

Table 10: Growth in Revenue of GSM Service Providers

Period	Revenue* (Rs. in Crores)	Quarterly rate of growth
Jan-07 to Mar-07	10,040	8.4%
Apr-07 to Jun-07	11,336	12.9%
July-07 to Sept-07$	11,903	5.0%
Oct-07 to Dec-07$	12,738	7.0%
Jan-08 to Mar-08$	14,329	12.5%
Apr-08 to Jun-08$	14,470	1.0%

* Net of pass through

$ Data excludes revenue from FWP services provided by some of the GSM operators

Table 11: ARPU (Rs. per month during the quarter)

Circle	Postpaid	Prepaid	Blended ARPU
Circle A	610	204	240
Circle B	508	200	216
Circle C	548	216	234
Metro	658	206	296
All India	**600**	**204**	**239**
All private SPs	654	211	247
BSNL/MTNL	439	178	207

Table 12: Composition of Revenue (%)

Item	Mar-08	Jun-08
Rental Revenue	19.9%	19.6%
Revenue from Call charges (usage)	57.4%	58.9%
Revenue from Roaming	9.8%	9.1%
Revenue from SMS	4.3%	4.2%
Other Revenues *	8.6%	8.2%

Notes:
* Other revenue includes revenue from other value added services, installation etc.

2.3.2 Usage Pattern

- Total MOU per subscriber has increased from 493 in Mar-08 to 505 in June-08, thereby showing an increase of 2.55% as against 6.23% in QE March-08. There is thus a drop in the rate of growth of total MOU.
- Outgoing MOUs continue to grow at a higher rate (3.92%) as compared to incoming MOUs (1.30%).
- Individually, both for postpaid and prepaid, Metros continue to have lowest outgoing MOU per subscriber as compared to other circle categories.
- Overall ratio of incoming-outgoing MOUs has been 51:49 for GSM services. For postpaid, ratio of incoming-outgoing minutes is 45:55 and for prepaid segment, it is 53:47.
- Outgoing SMS per subscriber continued to decline. Rate of decline has doubled to 14.5% in the quarter under review from a 7% decline in the quarter ending March 2008.

  Detailed data is given in Annex. 2.2.

2.3.3 Average Subscriber outgo (rental + call charges) per minute

The tariff plans are of bundled nature and the trade-off is generally between monthly fixed charges and Variable (call) charges. Annex 2.4 indicates the average outgo per outgoing minute i.e. Rental revenue + Airtime revenue per outgoing minute.

- All India average outgo per minute has declined from Rs. 0.92/- in March-08 to Rs. 0.84/- in June-08 indicating an overall decline in tariff for GSM services in the country.

2.4 CDMA (Full Mobility Service)

2.4.1 ARPU (Average Revenue Per User per month)

- All India blended ARPU per month for the quarter ending June 2008 is Rs. 139/- as compared to Rs. 159/- for the quarter ending March 2008.
- According to the revenue reports submitted by the service providers for the quarter ending June 2008, revenue, net of "pass through", from CDMA full mobility service is Rs. 2332.68 crores which was 2410.00 crores in the quarter ending March 2008 registering a decline of 3.20%.
- The huge difference between postpaid and prepaid ARPU noticed in the last quarter continued to remain valid for this quarter as well. Postpaid ARPU has been 3.95 times that of prepaid ARPU, which perhaps, could be attributed to declining importance of processing fee on recharge coupon/ voucher purchased by prepaid subscribers. The gap is lowest in Circle C (3.18 times) and highest in Circle A (4.19 times).

Table 13: ARPU (Rs. per month during the quarter) – CDMA

Circle	Postpaid	Prepaid	Blended ARPU
Circle A	442	105	137
Circle B	392	108	126
Circle C	435	137	150
Metro	462	112	156
All India	**436**	**110**	**139**

Table 14: Composition of Revenue (%)

Item	**March-2008**	**June-2008**
Rental Revenue	24.5%	23.0%
Revenue from Call Charges (usage)	62.2%	60.5%
Revenue from SMS	1.8%	2.1%
Roaming Revenue	2.9%	6.3%
Other Revenues*	8.6%	8.1%

* Includes revenue from other value added services, installations etc.

2.4.2 Usage Pattern (Minutes of Usage)

- Two trends are visible in the traffic pattern: One; the total MOU per subscriber/ month has shown decline from 364 (Q.E March 2008) to 354 (Q.E June 2008).
- Second, the O/G MOU per subs/ month has shown increase from 180 in previous quarter to 182 in the current quarter.
- ARPU has also decreased from Rs. 159/- (Q.E March-2008) to Rs. 139/- (Q.E June-2008) for the CDMA operators by 12.58%.
  Detailed data is given in Annex 2.3

2.4.3 Average Subscriber Outgo (rental + call charges) Per Minute

Average Subscriber Outgo per minute (Rental Revenue + Airtime Revenue per outgoing minute) is given in Annex. 2.5.

The All India Average Subscriber Outgo per minute is Rs. 0.68/- in June 2008 as against Rs. 0.79/- in March 2008.

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CHAPTER THREE

PERFORMANCE OF INTERNET SERVICES

3.1 Service Providers & Subscribers Base: -

There are 11.66 million Internet subscribers at the end of June 2008 as compared to 11.09 million at the end of March 2008 registering a growth of 5.09%. This growth rate is slightly less than the growth rate of 7.08% at the end of March 2008.

Among 141 ISPs reported their subscribers figure for Quarter ending 30th June 2008, Bharat Sanchar Nigam Ltd (BSNL) has retained its top position and reported a subscriber base of 5.94 million Internet subscribers against 5.64 million at the end of last quarter. Mahanagar Telephone Nigam Limited (MTNL) has retained second position with a subscriber's base of nearly 1.92 million. M/s Bharti Airtel Ltd is third with subscriber base of 0.87 million. (Ref. Table 3.1).

Besides above, there are 75.97 million wireless subscribers at the end of June 2008 (capable of accessing data services including Internet through mobile handset (GSM/ CDMA)).

3.2 Internet Telephony: -

The Internet Telephony has been permitted to all Internet service providers w.e.f 24th August 2007. Total 34 ISPs have been providing Internet Telephony services during the quarter ending 30th June 2008, the list is enclosed as Annex 3.2. Total minutes of usage for Internet Telephony during the quarter were 111.68 million, as compared to 115.04 million for the last quarter.

3.3 Market Share: -

3.3.1 The growth trend of Wireline Internet Subscribers indicates a slight increase in the market share of PSU owned ISPs vis-à-vis private operators. During the quarter, private ISPs market share has slightly increased to 32.56% as against 32.06% in the preceding quarter. The PSU owned ISPs market share has decreased from 67.94% to 67.44% at the end of June 2008.

3.3.2 The market share of top 5 ISPs is as under:

Table 15

Sl.	ISP	Subs. base	Share in %
1	Bharat Sanchar Nigam Ltd.	5943093	50.96
2	Mahanagar Telephone Nigam Ltd.	1922713	16.49
3	Bharti Airtel Ltd. (Bharti Televentures Ltd.)	871256	7.47
4	Reliance Communications Infrastructure Limited	824026	7.07
5	Sify Technologies Ltd.	564790	4.84

Among PSU owned ISPs; M/s BSNL has shown an increase of 5.37% in the subscriber base and have 50.96% share of total wireline subscriber base. MTNL is at second position and have a market share of 16.49%.

Figure 3.1: Internet Subscriber Base as on 30.06.2008

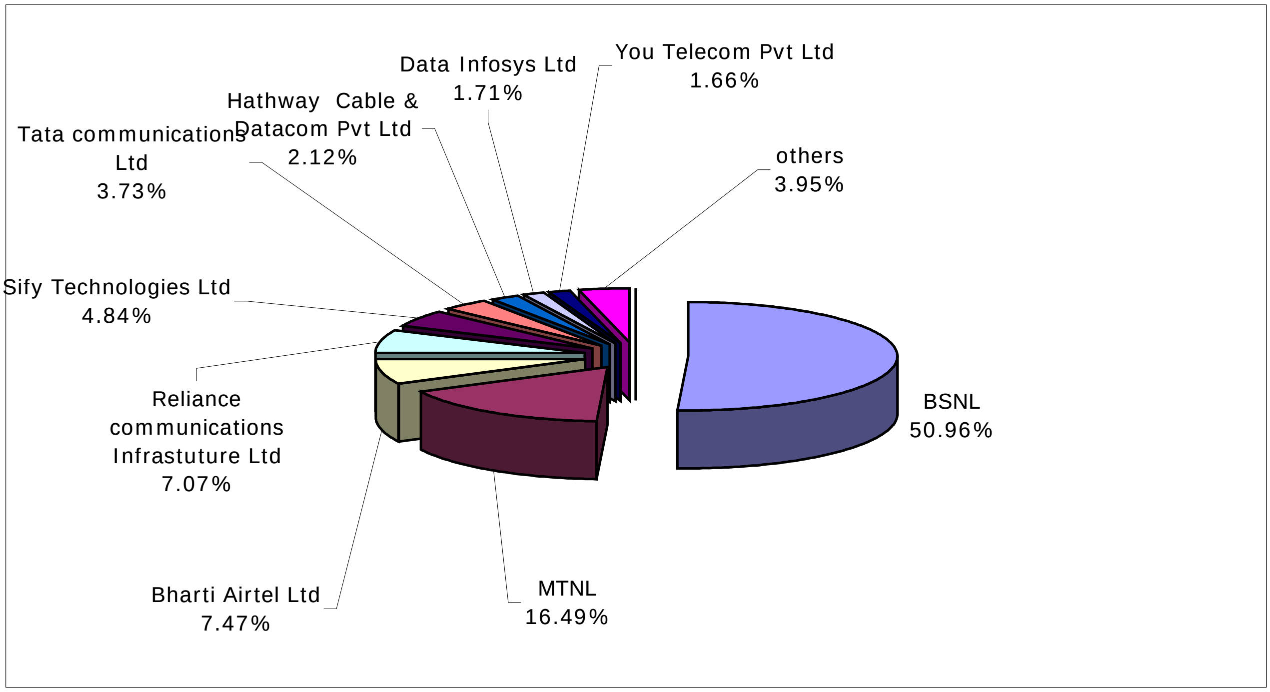
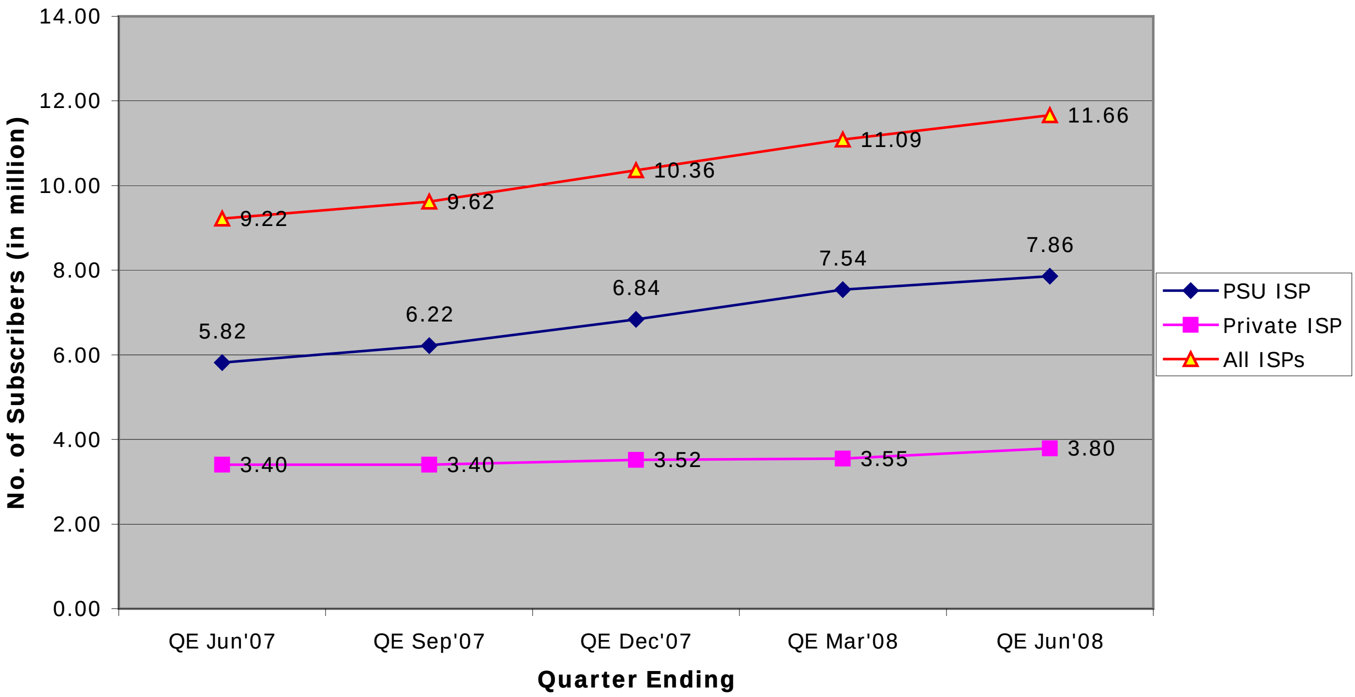
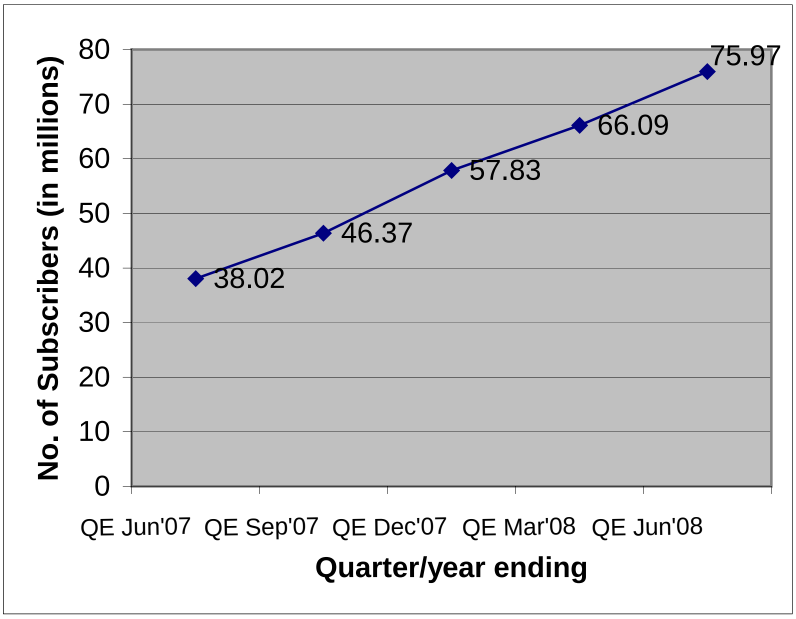


Fig 3.2 Growth Trends of Wireline Internet Subscribers



The growth trend of Wireless Subscribers capable of accessing data services including Internet through their mobile handsets is shown below:

Figure 3.3 : Growth of Wireless Subscribers Capable of Accessing Data Services/ Internet



This segment has been showing an increasing trend during the year 2008. These subscribers can use mobile handsets which are having "Internet enabled" feature.

3.4 Leased Lines Connectivity:

The numbers of Internet Leased Line connections are 24154 at the end of June 2008 as compared to 22752 at the end of March 2008 registering a growth of 6.16%.

3.5 Broadband Connectivity (>=256 Kbps):

The number of Broadband subscribers (with a download speed of 256 Kbps or more) was 4382136 at the end of June 2008. Out of these 3723741 are DSL based; 419028 Cable Modem; 107940 Ethernet LAN; 44870 Fibre; 57023 Radio customers; Leased Line 17878 and 11656 Others.

3.6 Company wise market share of Broadband Service Providers:

The Top 10 Internet Service Providers providing broadband service on the basis of market share are:-

Table 16

Sl.No	ISPs Offering Broadband Services	Subscribers Base	Share in %
1	Bharat Sanchar Nigam Ltd.	2328900	53.15
2	Mahanagar Telephone Nigam Ltd.	594115	13.56
3	Bharti Airtel Ltd.	579830	13.23
4	Hathway Cable & Datacom Pvt. Ltd.	204495	4.67
5	Tata Communications	193652	4.42
6	You Telecom India Pvt Ltd	146486	3.34
7	Reliance Comm. Infra. Ltd.	85659	1.95
8	Sify Limited	64871	1.48
9	Asianet Satellite Communication Limited	43319	0.99
10	HFCL Infotel Ltd	19274	0.44
	Sub Total	**4260601**	**97.23%**
	Others	**121535**	**2.77%**
	TOTAL	**4382136**	**100%**

3.7 Minutes of Use (MoU) per subscriber for Dialup Internet access:

The average minutes of usage per subscriber/ month for dialup subscribers was approximately 225 minutes during day time i.e. between 8 a.m to 8 p.m and approximately 127 minutes during night time i.e. between 8 p.m to 8 a.m. at the end of June 2008.

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3.8 Average Revenue Per User (ARPU) for ISPs:

The average revenue per user (ARPU) per month for dialup Internet usage was Rs 225/- at the end of June 2008 as compared to Rs 220/- at the end of March 2008 having a growth of 2.27%.

3.9 International connectivity:

The bandwidth owned by various ISPs for their ISP operations and Internet Leased lines is reported to be 63 GB for downlinking and 62 GB for uplinking at the end of June 2008 as compared to 47 GB for downlinking and 42 GB for uplinking at the end of March 2008.

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CHAPTER FOUR

PERFORMANCE OF VALUE ADDED SERVICES

4.1 Public Mobile Radio Trunk Service (PMRTS): -

The subscriber base of PMRTS decreased from 36240 in March, 2008 to 35157 in June, 2008 registering a negative growth of 2.99%.

Delhi, Bangalore, Mumbai and Chennai together account for 69.27% of market share of the total subscribers. Operative area Delhi leads the tally with the market share of 9237 subscribers followed by Bangalore, Mumbai and Chennai with the market share of 6031, 5143 and 3941 subscribers respectively.

M/s Arvind Mills Limited leads the tally of subscribers with a subscriber base of 11742 followed by M/s Procall and M/s Quick Calls India Pvt. Ltd. with a subscriber base of 9007 and 4023 respectively. The subscribers base of other PMRTs is M/s.Smartalk Pvt. Ltd.(2527), M/s United Liner Agencies of India (1965), M/s Arya Doot Transport Pvt Ltd(1694),M/s.Bhilwara Telenet Services Pvt. Ltd. (1417). M/s. Arya Offshore Services Pvt. Ltd. (1330), M/s. German Express Shipping Agencies of (India) Pvt. Ltd.(776), M/s Jet-Aiu(491) & M/s India Satcom(180). There is no change in the subscriber base for the PMRTS operator namely M/s Container Movement Transport Pvt Ltd.

M/s. Jet-Aiu Skyline Transport (491), M/s Arya Offshore Services (1330), M/s United Liner (1965), M/s German Express (776), M/s Procall Ltd (9007), M/s. The Arvind Mills (11742), M/s. Quick Calls (4023), and M/s. India Satcom (180) have registered a negative growth rate in their subscriber base. The growth rate of M/s Quick Calls has deteriorated significantly from 1.97% to –13.82% in their subscriber base as compared to the previous quarter.
The subscriber base of service providers of PMRTS is given in Table 4.1.

5.1 VSAT services: -

- VSAT services are being provided by 9 VSAT Service Providers.
- In this quarter, there was an addition of 8473 new subscribers. The total number of subscribers increased from 81395 in March, 2008 to 89868 in June, 2008, registering a growth of **10.41%** as against the growth rate of 20.75% in quarter ended March, 2008.
- M/s Hughes Communication Limited is the market leader with subscribers base 27065 followed by M/s HCL Comnet with 24431 and M/s Bharti Airtel Limited Bangalore with 23101 VSAT subscribers respectively.
- M/s BSNL has the highest growth rate of 28.53% followed by M/s Bharti Airtel Ltd (26.98%) in this quarter.
- There is no change in the subscriber base for the VSAT operator namely M/s Essel Shyam, M/s Tatanet Services, M/s ITI and M/s GNFC.

Number of VSAT Subscribers has been steadily growing over the last four quarters. Service Providers especially M/s BSNL, M/s Bharti Airtel Limited , M/s Hughes Communications Ltd. And M/s HCL Comnet have reported good increase in their Subscriber base in this quarter and is given in Table 4.2.

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CHAPTER FIVE

QUALITY OF SERVICE (QoS) PERFORMANCE

5.1 Quality of Service performance of Wireline Service Operators:

Based on Quality of Service Parameters reported by all the Wireline Service Operators for the quarter ending June 2008, the information on QoS performance is attached to this report at Annex 5.1.

The summary of status of the service providers who have not met the benchmarks in this quarter as compared to previous quarter is given in the Table below:

Table 17

Sr. No.	Parameters	Benchmark	No. of operators not meeting the benchmarks			
			March, 2008		June, 2008	
			Out of 78 In Nos	Out of 78 In %age	Out of 78 In Nos	Out of 78 In %age
1	**Provision of Telephones after registration of demand**	100% within 7 Days	65	83.33%	52	66.67%
2	**Fault incidences per 100 subs/month**	<5 w.e.f. June '08 (<3)	25	32.05%	46	58.97%
3	**Fault repaired by next working day**	>90%	18	23.08%	17	21.79%
4	**MTTR**	<8Hrs	25	32.05%	21	26.92%
5	**Grade of Service (Junction between local exchange)**	2/1000	2	2.56%	2	2.56%
6	**Call Completion Rate (in local network)**	>55%	7	8.97%	4	5.13%
7	**Metering & billing credibility - % of bills**	<0.1%	5	6.41%	1	1.28%
8	**Customer Care Service (95% of requests)**					
(i)	Shifts	<3 Days	21	26.92%	18	23.08%
(ii)	Closures	<24 hrs.	7	8.97%	8	10.26%
(iii)	Additional Facilities	<24 hrs.	15	19.23%	9	11.54%
9	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically)					
	Within 20 sec = 80%	80%	1	1.28%	1	1.28%
	within 40 sec = 95%	95%	1	1.28%	2	2.56%
(ii)	%age of calls answered by operator (voice to voice)					
	Within 60 sec = 80%	80%	1	1.28%	2	2.56%
	within 90 sec = 95%	95%	9	11.54%	8	10.26%
10	**Time taken for refund of deposits after closures**	100% within 60 days	8	10.26%	2	2.56%

Table 18:The parameter wise performance is given as under:

Parameters	Benchmarks	Service Providers not meeting the benchmarks
Provision of Telephones after registration of demand	**100% within 7 Days**	**BSNL** = AP (85.97%), GJ (96.73%), MH (84.01%), Punjab (99.31%), HR (99.87%), KTK (99.31%), A&N (80.19%), Assam (94.49%), Chennai (99.39%), Jharkhand (98.60%), Kerala (98.66%), Kolkata (96.24%), NE-I (80.70%), Orissa (99.38%), UP-E (99.46%), UP-W (93.79%), Uttaranchal (96.66%) **MTNL** = Delhi (99.59%), Mumbai (95.27%) **Reliance** = AP (79.36%), Bihar (42.44%), Delhi (22.04%), MP (68.72%), MH (86.26%), Punjab (74.37%), RJ (72.90%), HR (82.22%), KTK (40.37%), HP (3.33%), Kerala (91.13%), Kolkata (38.89%), Mumbai (37.21%), Orissa (0.00%), UP-W (99.68%), WB (35.93%) **Bharti** = All circles except Delhi, Punjab, Rajasthan, Tamilnadu, Haryana, Kolkata, UP-E and UP-W **Tata** = AP (98.00%), Delhi (85.48%), GJ (99.20%), MH (71.61%), PB (97.03%), KTK (94.64%), Kolkata (86.22%), Mumbai (82.46%) **HFCL** = Rajasthan (87.38%) **Shyam** = Rajasthan (87.38%)
Fault incidences per 100 subs/month	**<3**	**BSNL** = All circles except TN **MTNL** = Delhi (6.95), Mumbai (8.79) **Reliance** = AP (4.30), GJ (3.32), MP (5.12), PB (3.70), UP –E (11.04) **Bharti** = AP (6.00), Delhi (4.88), MP (7.00), MH (3.03), PB (3.06), RJ (4.43), TN (6.26), HR (4.86), KTK (5.00), Kolkata (3.64), UP-E (7.00), UP-W (7.38) **Tata** = Gujarat (4.30)

		HFCL = Punjab (5.00)
Fault repaired by next working day	**>90%**	**BSNL** = Bihar (73.18%), Chhattisgarh (87.19%), MH (88.45%), Punjab (88.58%), A&N (80.72%), Assam (69.99%), HP (88.28%), J&K (72.30%), KR (83.93%), Kolkata (89.49%), West Bengal (81.73%) **MTNL** = Mumbai (85.22%) **Reliance** = Delhi (89.94%), TN (89.99%) **Tata** = PB (69.23%), HR (75.68%), Chennai (86.96%)
MTTR	**<8Hrs**	**BSNL** = All circles except GJ, MP, RJ, TN, HR, HP, Jharkhand, A&N, J&K, Orissa, UP-E and UP-W **MTNL** = Mumbai (18.70) **Bharti** = AP (10.90 hrs), TN (12.00 hrs.) **Tata** = PB (28.30 hrs.), TN (12.00 hrs.), HR (23.20 hrs.), Chennai (16.03 hrs.)
Grade of Service	**(2/1000)**	**Bharti** = UP-E (0.0070), UP-W (0.0060)
Call Completion Rate (in local network)	**>55%**	**BSNL** = Jharkhand (52.83%), J&K (51.38%) **MTNL** = Delhi (49.91%) **Bharti** = UP-W (53.00%)
Metering & billing credibility - % of bills	**<0.1%**	**Tata** = MH (0.149%)
Customer Care Service (95% of requests)		
Shifts	**<3 Days**	**BSNL** = AP (77.00%), MH (87.00%), Punjab (87.00%), A&N (82.00%), Kerala (89.00%), NE-I (87.00%), and Uttaranchal (94.00%) **MTNL** = Delhi (90.96%), Mumbai (87.83%) **Bharti** = HR (94.88%), Kolkata (93.88%) **Reliance** = MP (93.62%) **Tata** = AP (84.14%), Delhi (88.00%), GJ (93.58%), MH (76.79%), PB (68.42%), KTK (75.00%)

Closures	**<24 hrs.**	**BSNL =** AP (93.81%), MH (93.46%), HP (91.67%) **Bharti =** AP (89.98%) **Tata** = Delhi (84.06%), GJ (91.38%), MH (87.36%), KTK (89.19%)
Additional Facilities	**<24 hrs.**	**BSNL =** AP (89.27%), Bihar (89.33%), J&K (91.08%), KR (94.68%) **Tata** = AP (93.75%), MH (89.61%), KR (75.51%), Kolkata (68.50%) **Shyam =** Rajasthan (89.31%)
Response time to the customer for assistance		
%age of calls answered electronically		
Within 20 sec = 80%	**80%**	**BSNL** - Uttaranchal (60.67%)
Within 40 sec = 95%	**95%**	**BSNL** - NE-II (91.61%), Uttaranchal (57.33%)
%age of calls answered by operator (voice to voice)		
Within 60 sec = 80%	**80%**	**Bharti -** GJ (78.00%), MH (78.67%)
within 90 sec = 95%	**95%**	**BSNL =** AP (91.97%) **MTNL** = Mumbai (87.70%) **Bharti =** Delhi (94.00%), GJ (83.00%), MH (83.00%), Mumbai (91.00%) **Tata =** GJ (94.00%), Mumbai (92.26%)
Time taken for refund of deposits after closures	**100% within 60 days**	**Bharti** = MP (98.00%), Mumbai (99.00%)

5.2 Quality of Service performance of Wireless Service Providers for quarter ending 30th June 2008: -

5.2.1 This report covers performance of 93 GSM and 44 CDMA service operators vis-à-vis the QoS benchmarks prescribed by TRAI. The summary of performance of service providers not meeting the benchmark as compared to previous quarter is given in the table below:

Table 19

Sr.No.	Parameters	Benchmarks	No. Of Operators Not Meeting The Benchmarks			
			Quarter Ending March, 2008		Quarter Ending June, 2008	
			Out Of 134 (Nos.)	Out Of 134 (in %)	Out Of 134 (Nos.)	Out Of 134 (in %)
1	**Accumulated down time of Community isolation**	**<24 hrs**	0	0.00%	0	0.00%
2	**Call Set-Up Success Rate (Within Licensee's Own network)**	**>95%**	2	1.49%	5	3.73%
3	**Service access delay**	**<15 Sec**	0	0.00%	2	1.49%
4	**Blocked call rate** (i) SDCCH/paging channel congestion	**<1%**	9	6.72%	6	4.48%
	(ii) TCH Congestion	**<2%**	12	8.96%	12	8.96%
5	**Call drop rate**	**<3.0%**	0	0.00%	0	0.00%
6	**%age of Connections with good voice quality**	**>95%**	0	0.00%	6	4.48%
7	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically); within 20 seconds = 80%	**80%**	0	0.00%	0	0.00%
(ii)	%age of calls answered (electronically); within 40 seconds = 95%	**95%**	0	0.00%	1	0.75%
(iii)	%age of calls answered by operator (voice to voice); within 60 seconds = 80%	**80%**	22	16.42%	22	16.42%
(iv)	%age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	52	38.81%	47	35.07%
8	**Complaints per 100 bills issued**	**<0.1%**	6	4.48%	2	1.49%
9	**% Of complaints resolved with 4 weeks**	**100%**	1	0.75%	1	0.75%
10	**Period of all Refunds/Payment due to Customers from the date of resolution of complaints As In (9) above**	**<4 Weeks**	1	0.75%	1	0.75%

NOTE : * M/s Bharti Airtel has submitted a combined PMR for TN & Chennai as the License of M/s Bharti Airtel Chennai circle has been merged with Tamilnadu circle. The Licence of M/s Reliable Internet Service has been merged with Reliance Telecom Ltd, Kolkata. So, total no. of Licensees providing PMR is 134.

Table 20: The parameter wise performance is given as under:

Parameters	Benchmarks	Service Providers Not Meeting The Benchmarks
Accumulated down time of Community isolation	**<24 hrs**	**All the Operators meeting this Benchmark**
Call Set-Up Success Rate (Within Licensee's Own network)	**>95%**	**MTNL** - Delhi (89.96%)– GSM Service **Airtel** - KTK (94.05%), RJ (88.34%), WB (91.10%), NE (94.18%)
Service Access Delay	**<15 sec**.	**Vodafone** - GJ (16.49 sec) **Idea** - UP-E (15.77 sec.)
Blocked call rate (i) SDCCH/paging channel congestion	**<1%**	**Bharti Airtel** – AP (1.02%), KTK (1.38%), RJ (4.78%), Bihar (8.93%), WB (4.09%), NE (1.98%)
(ii) TCH Congestion	**<2%**	**BSNL** - AP (2.97%), KR (3.40%) **MTNL** - Delhi (5.10%) – GSM Service **RTL** – Assam (2.30%), NE (2.23%) **Bharti Airtel** - AP (2.72%), KTK (2.76%), MP (2.06%), RJ (5.36%), Bihar (7.99%), WB (3.29%), NE (2.50%)
Call Drop Rate	**<3%**	**All the Operators meeting this Benchmark**
%age of Connections with good voice quality	**>95%**	**Bharti Airtel** - MH (93.10%), KTK (93.08%) **RTL** - Assam (94.00%) **Dishnet** - WB (93.97%), Assam (92.65%), NE (93.15%)
Response time to the customer for assistance **%**age of calls answered **(electronically)** within 20 seconds = 80%	**80%**	**All the Operators meeting this Benchmark**
%Age of calls answered (**electronically)** within 40 seconds = 95%	**95%**	**BSNL** - UP-E (94.00%)
%Age of calls answered by operator (**voice to voice);** within 60 seconds = 80%	**80%**	**BSNL** - AP (71.74%), UP-E (72.00%), Raj (78.00%), Chennai (77.00%) **MTNL** - Delhi (44.87%) - GSM Service **Bharti Airtel** - KR (78.50%), UP-E (59.10%), Assam (53.90%), J&K (74.00%), NE (71.30%) **Reliance Comm** - MH (70.75%), GJ (77.45%), AP (57.31%), TN (65.94%), KR (75.22%), PB (64.71%), HR (44.14%), HP (64.71%), Delhi (78.71%) **RTL** - HP (73.30%) **Tata** - UP-W (69.00%), Delhi (78.00%)
%Age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	**BSNL** – MH (93.52%), AP (80.86%), KTK (90.37%), KR (88.20%), UP-E (86.10%), RJ (90.00%), MP (90.60%), Assam (92.00%), NE (94.33%), Chennai (82.00%), Kolkata (92.00%) **MTNL** - Delhi (64.65%)– GSM Service **Bharti Airtel** - MH (94.40%), KR (87.80%), UP-W (92.80%), UP-E (76.60%), MP (90.80%), WB (89.20%), Bihar (93.10%), Assam (61.50%), J&K (86.60%), NE

		(76.80%), Kolkata (89.20%) **Reliance Comm -** MH (80.69%), GJ (85.16%), AP (65.48%), KTK (90.45%), TN (71.44%), KR (84.70%), PB (69.45%), HR (53.34%), HP (69.45%), Bihar (91.19%), Delhi (83.65%), Mumbai (88.34%), Chennai (90.82%) **Tata Tele -** PB (92.90%), UP-W (76.60%), WB (94.60%), Delhi (84.20%) **Dishnet Wireless -** PB (92.90%), UP-W (76.60%), WB (94.60%), Delhi (84.20%) **Idea** - MP (92.60%) **Shyam** - RJ (91.00%)
Complaints per 100 bills issued	**<0.1%**	**BSNL - KTK** (0.130%) **Tata Tele - HR** (0.180%)
% Of complaints resolved within 4 weeks	**100%**	**BSNL- Bihar** (99.78%)
Period of all Refunds/Payment due to Customers from the date of resolution of complaints	**<4 Weeks**	**Aircel Cellular - Chennai** (60 days)

Some of the Service Providers are having problems in achieving the benchmarks in respect of parameters (i) %age of calls answered by operator (voice to voice); within 60 seconds (ii) %Age of calls answered by operator (voice to voice); within 90 seconds.

5.2.2 Details of Quality of Service Parameters :

Detail of performance related to Network Performance, Customer help line and billing complaints are available at Annex 5.2.

5.3 Quality of Service Performance of Internet Service Providers for quarter ending 30th June 2008: -

5.3.1 Annex 5.3 indicates the Quality of Service achieved by the ISPs during the quarter.

5.3.2 The observations on QoS Benchmarks are as follows:

5.3.2.1 <u>Service Activation Time (6 hrs):</u>

All the ISPs have met the TRAI benchmark of 6 hrs. M/s HFCL Infotel LTD and M/s Tata Teleservices (MH)/ Hughes Telecom have not provided the data.

5.3.2.2 <u>Time to Access (30 sec) :</u>

All the ISPs have met the TRAI benchmark of 30 sec

5.3.2.3 <u>Probability of Accessing the ISP Node</u>

All the Internet Service Operators have met this benchmark of 80% for first attempt, 90% for second attempt and 99% for third attempt in this quarter.

5.3.2.4 <u>ISP Node Unavailability (30 min)</u>:

ISP Nodes unavailability should not exceed 30 minutes in a month. All the ISPs have met the TRAI benchmark. M/s. HFCL Infotel Ltd. and M/s Tata Teleservices (MH) have not been provided data.

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5.3.2.5 <u>Grade of Service (1 in 100):</u>

ISPs are required to maintain the Grade of Service on the link connecting PSTN Node to the ISP Node as 1 in 100. M/s.Reliance Comm. Infrastructure Ltd., has not provided data. M/s Tata Communications has informed that information not provided by BSO. BSNL also not provided data to M/s You Telecom India Pvt. Ltd.

5.3.2.6 <u>Mean Time to Restore (MTTR)</u> (3 days):

As per clause 1.9 schedule "C" of ISPs license. ISPs are required to rectify 90% of faults resulting due to subscriber complaint within 24 hours and 99% within three days. All the Operators have met this benchmark.

5.4 Quality of Service Performance of Internet Service Providers providing broadband service for quarter ending 30th June 2008

Broadband Regulations came into force with effect from 1st January of 2007. Total number of the Broadband Service providers was 72 in last quarter March, 2008. No new service provider is added in this quarter.

Out of 72 Broadband Service providers only 13 Service Providers are having subscriber base more than 10,000 subscribers and these 13 Service providers share the 98.59% of total subscriber base in this quarter. The total number of Broadband Subscribers of these 13 Service Providers have increased from 3824955 to 4320498 by adding 4,95,543 (12.95%) subscribers in the quarter ending June, 2008. This report covers performance of 13 broadband Service Providers vis-à-vis the QoS benchmarks prescribed by TRAI.

Broadband Regulations came into force with effect from 1st Jan 2007. Based on Quality of Service Parameters reported by Internet Service Providers providing broadband service for the quarter ending June 2008, the information on QoS performance is attached to this report as Annex 5.4.

Following table indicates the status of non-compliance in respect of QOS benchmarks for Internet Service Providers providing broadband service:

Table 21

Sl. No.	Parameters	Benchmarks	Name of Service Provider not Meeting the Benchmark
1	**Service Provisioning/ Activation Time**	100% in =< 15 working days	**BSNL:-** AP(98.90%), Bihar(99.20%), Chhattisgarh (99.00%), HR(99.90%), HP(99.60%), J&K(93.10%), Jharkhand (99.10%) ,KTK (79.40%), KR (86.70%), Kolkata (91.40%), MH (76.00%), MP(99.00%) NE-I(78.30%), Orissa (91.90%), Punjab(98.50%) TN(83.80%), UP(W)(94.60%), Uttaranchal (68.20%) ,WB(93.30%). A&N (98.70% **MTNL:-** Delhi(74.52%), Mumbai(66.65%). **Bharti Airtel:-** AP(99.00%), Guj(99.00%) KTK(99.00%), MP&CG(99.00%), MH(98.00%), Mumbai (99.00%), TN(97.00%). **Tata Communications:-** North (99.00%) South1 (99.00%), South2 (98.00%), South 3(99.00%), West 1(99.00%) **You Telecom :** All India(99.90%), MH(99.97%) **Hathway:-** Guj(93.26%), MH(94.00%) **Reliance :-** All India (72.00%)
2	**Faults Repair /Restoration Time**		
	% of faults repaired by next working day	>90%	**BSNL:-** Kolkata(51.50%), NE-I(88.80%), **MTNL:-** Delhi (76.37%), Mumbai (76.95%) **Bharti Airtel** : KTK(89.00%) **Tata Communications :-** East(86.00%) North(77.00%), South1(85.00%), South2(89.00%), South3(84.00%), West1(86.00%) **Hathway :** KTK(89.17%)

			Sify: All India (87.00%)
	% of faults repaired within 3 working day	=>99%	**BSNL:-** KTK(79.20%), MH(96.00%), MP(95.20%), TN(95.50%), WB(92.10%) **MTNL:-** Delhi (95.77%), Mumbai(94.58%) **Bharti Airtel:-** KTK(94.00%), TN(98.00%). **Sify:** All India (94.00%) **Tata Communications:-** Central Region (98.00%) East (96.00%), North (89.00%), South I (95.00%), South 2(97.00%), South 3(95.00%), West I (95.00%), West 2(98.00%) **Hathway:-** AP(98.90%)
3	**Billing Performance**		
	%age of bills disputed	<2%	**Tata Communications:-** North(2.21%)
	%age of billing complaints resolved within 4 weeks	100% within 4 weeks	**BSNL:-** AP(96.30%), Bihar(99.60%), Chattisgarh(99.90%) HP(88.90%), J&K(99.30%) Jharkhand(99.90%), Karnataka(95.90%), Kolkata(77.30%), Orissa(93.70%), Raj(98.40%), Uttaranchal(83.30%), WB(86.10% **MTNL:** Delhi(99.13%) **Bharti Airtel:** AP(99.00%), Delhi(99.00%), KTK(98.00%), TN(98.00%)
	%age of cases to whom refund of deposits is made within 60 days of closures	100% within 60 days	**BSNL:-** AP(96.90%), Chatisgarh(99.90%), HP(94.40%), J&K(93.30%), KTK(97.80%), Kolkata(94.30%) Orissa(85.50%), Uttaranchal(83.30%), NE I (88.90%), WB (83.30%) **Bharti Airtel:-** MP & CG (99.00%) **You Telecom India Pvt. Ltd.:** All India (97.84%), AP(97.06%), Guj(95.61%), MH(99.33%) **Hathway :** AP(98.83%), Chennai(99.00%)
4	**Response Time to the Customer for assistance**		
	%age of calls answered by operator (Voice to voice) within 60 sec	>60%	**MTNL:** Mumbai(46.15%)
	%age of calls answered by operator (voice to Voice) within 90 sec	>80%	**MTNL:-** Mumbai(52.68%) **Bharti Airtel:-** Delhi(77.00%), Haryana(78.00%), KTK(78.00%), Punjab(78.00%), Raj(78.00%), UP-East(78.00%), UP-West(78.00%)
5	**Bandwidth utilisation/through put**		
	No. of Intra network links having Bandwidth utilisation >90% during peak hours (TCBH)		**Bharti Airtel:-** Delhi(20 Links), **Reliance :** All India (28 Links) **Alliance Broadband :** Kolkata(7 Links)

	No. of Upstream links for International connectivity having bandwidth utilisation >90% during peak hours (TCBH)		**Alliance Broadband :** Kolkata(2 Links)
	% of International bandwidth utilization during peak hours (TCBH) Enclose MRTG) **Benchmark<90%**		**MTNL :** Delhi(91.00%) **Bharti Airtel:** Punjab(91.00%) **Alliance Broadband :** Kolkata(93.00%)
6	Service availability /uptime (for all users) in %age	>98%	**BSNL:** J&K(97.10%), NE I (93.70%), NE II (97.60%), Uttaranchal(96.70%) **Tata Comm. Ltd.):-** East (97.82%), North (97.18%), South 3(97.67%), West I (97.52%) **Ortel :** Orissa (96.00%)
7	Packet loss (for wired broadband access) in %age	<1%	

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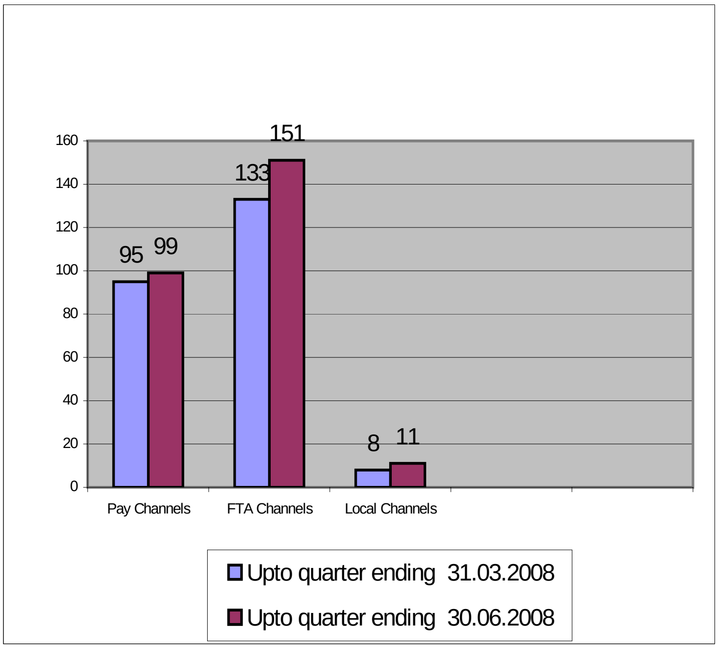
CHAPTER SIX

PERFORMANCE OF CABLE TV, DTH AND RADIO BROADCASTING SERVICES

6.1 Cable TV Services

6.1.1 The following Figure depicts the maximum number of FTA channels, Pay channels and local channels being carried by the MSOs in their network across the country. The Figure No. 6.1 is based on the reports received from some of the major service providers regarding the number of channels being carried by them in their networks (analogue and/or in digital form). These channels have been reported across different networks of the service providers having different combinations of pay, FTA and Local channels in their network.

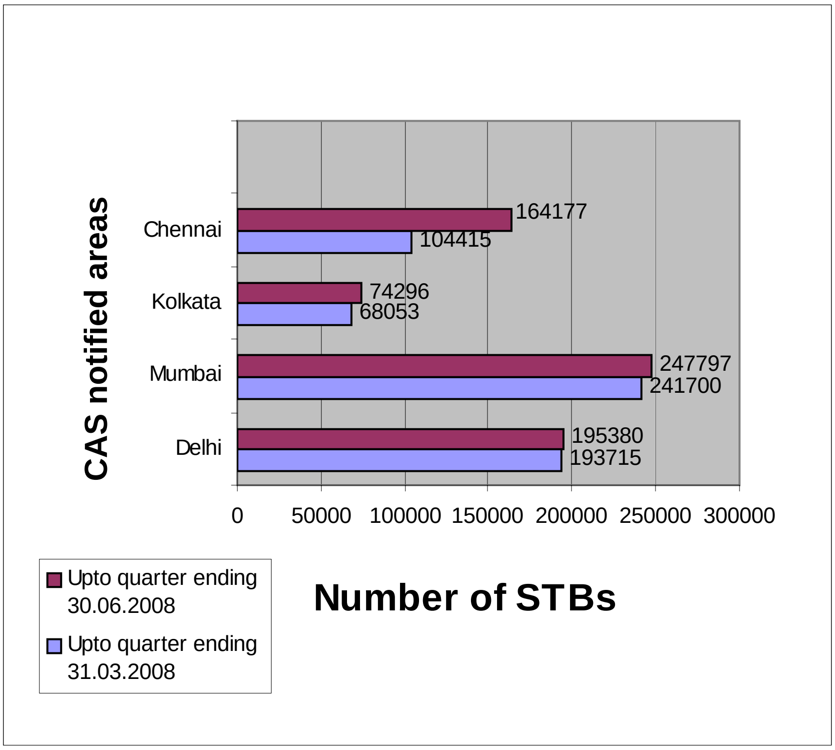
Figure 6.1 : Maximum Number of Channels



6.1.2 The maximum number of Free-to-Air (FTA) and Pay Channels reportedly being carried in the cable networks are **151** and **99** respectively in this quarter. However, these numbers relate to different networks and hence cannot be added for arriving at the total number of channels.

6.1.3 At the end of quarter March, 2008, there were 607883 number of set top boxes (STBs) installed in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai. Now, at the quarter ending June 2008, the number has increased to 681650 in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai. The following Figure No. 6.2 shows the city-wise status of STBs installed at these four places.

Figure 6.2 : Set Top Boxes (STBs)



6.2 Satellite TV Channels

6.2.1 At the end of June, 2008, there are reportedly 124 pay channels in existence. These 124 channels are being broadcasted / distributed by 17 broadcasters or their distributors. The list of broadcasters/distributors of pay channels alongwith the rates of pay channels for Non-CAS areas is available at Table 6.1.

6.2.2 In the quarter ending June 2008, 1 pay channel was launched by a broadcaster. The details are as under

Table 22 : List of New Pay Channel Launched

S.No	Name of the Broadcaster	Name of the pay channel
1	M/s MAA Television Network Limited	MAA Music

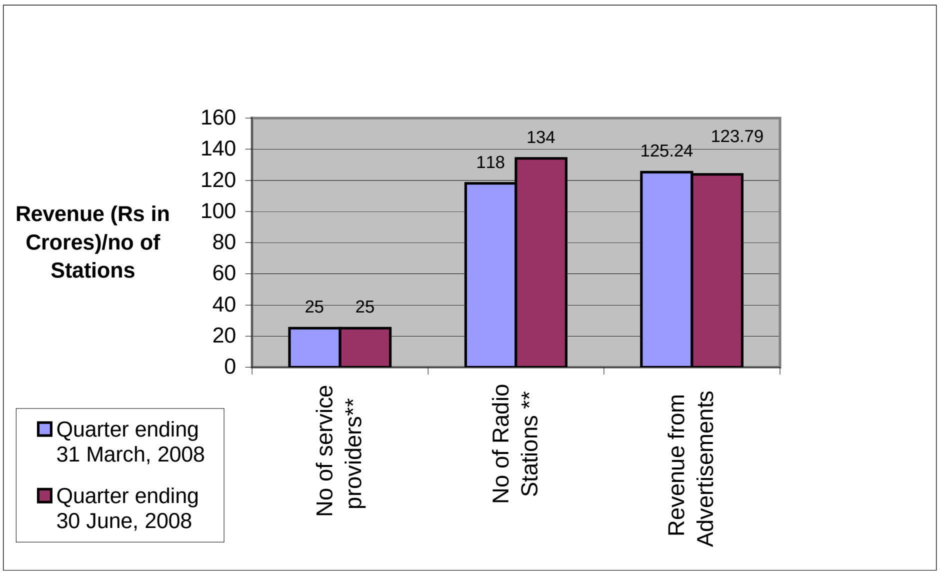
6.2.3 The list of new pay channels introduced after 26.12.2003 and list of FTA channels converted into pay channels after 26.12.2003 are also placed at Table 6.2 and Table 6.3 respectively.

6.3 FM Radio Services

6.3.1 During the quarter, 31 private FM Radio Stations came into operation. Apart from the FM Radio stations of All India Radio, there are 236 private FM Radio stations in operation across the country as on June 30, 2008. The list of these stations is available at Table 6.4.

6.3.2 The total Advertisement Revenue for the quarter ending March' 08 in respect of 25 FM Radio Service Providers and quarter ending June, 2008 in respect of 23 FM Radio Service Providers who have given their reports is given in the Figure 6. 3. The details do not pertain to the same set of service providers, hence not comparable.

Figure 6.3 : Comparative Position of Revenue of FM Radio Station

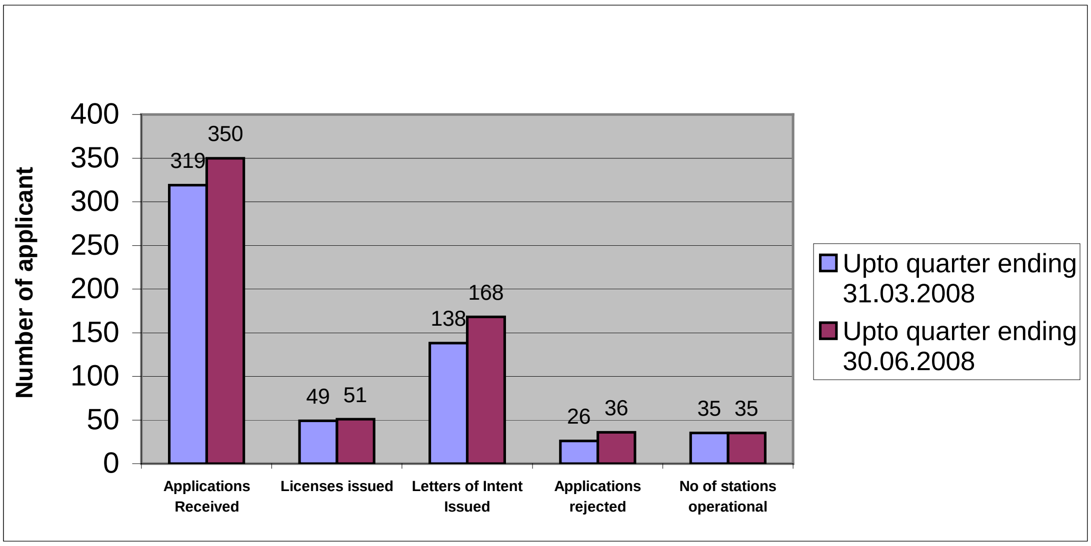


** Some of the service providers have not reported the advertisement revenue details.

6.4 Community Radio

6.4.1 For quarter ending March 2008, there were **49** Community Radio Station licensees and out of these, **35** were in operation. In the Quarter Ending June, 2008, 2 more licenses were issued Now, at the quarter ending June, 2008, out of **51** licensees of community radio stations, **35** stations are in operation. The status of applications for community radio station licenses received in Ministry of Information and Broadcasting upto the end of June 2008 is at Table 6.5. The Figure 6.4 gives the status of applications for Community Radio licenses upto the quarter ending June 2008 received by Ministry of Information and Broadcasting:-

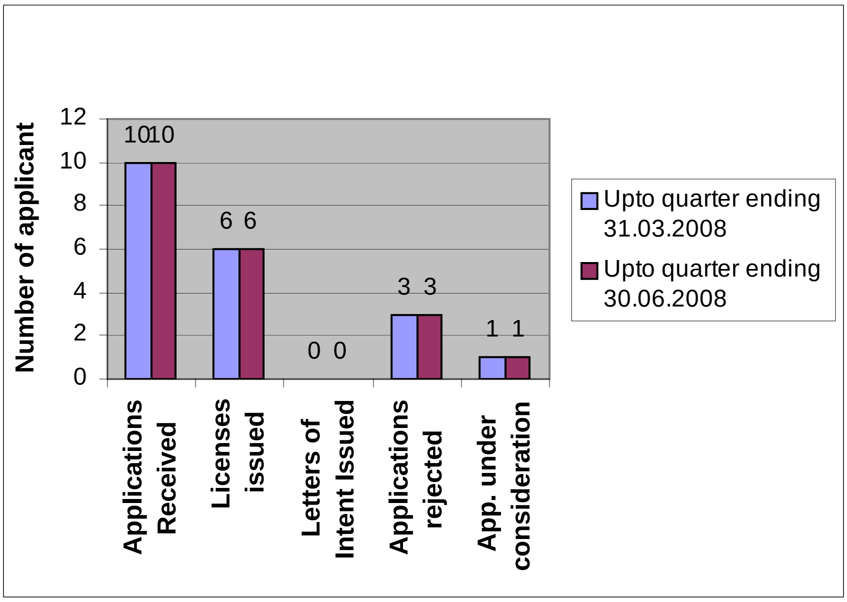
Figure 6.4 : Status of Community Radio Stations Applications



6.5 DTH Services

6.5.1 No DTH license was issued during this quarter. Therefore, at present, apart from free to air DTH service of Doordarshan, there are 6 private DTH licensees. The Figure 6.5 gives the status of applications for DTH licenses upto the quarter ending June 2008 received by Ministry of Information and Broadcasting:-

Figure 6.5: Status of DTH Applications



6.5.2 Out of 6 licensees, only 3 licensees are offering pay DTH services to the customers as on 30.06.2008. The list of DTH licensees is available at Table 6.6.

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CHAPTER SEVEN

FINANCIAL DETAILS OF TELECOM SERVICE SECTOR

7.1 Analysis of GR, AGR, License Fee & Spectrum Charges for the Quarter ending June 2008 (I^{st} Quarter of the fin. year 2008-09)

- Figures for the Industry as a whole for ending June are 2008 given below:

Table 23

Item	Amount (Rupees in crore)
Gross Revenue (GR)	**35311**
Adjusted Gross Revenue (AGR)	26990
License Fee (LF)	2316
Spectrum Charges	744
Pass through (GR – AGR)	8321

- There is a decrease in Gross Revenue and AGR by 1.30% and 3.17% respectively over the previous quarter.
- Service Provider wise GR, AGR, LF & Spectrum Charges for quarter ending June 2008 are available at Table 7.1.
- For the first time, Bharti – Airtel Group has the highest Gross Revenue (Rs. 9475 crore) pushing the BSNL to the second spot (Rs. 8214 crore). However, in terms of AGR, BSNL is still No. 1 at Rs. 7323 crore against Rs. 6874 crore for Bharti Group.
- There is a drop of 23.58% in GR of BSNL (from Rs. 10747.79 crore in previous quarter to Rs. 8213.92 in this quarter). On the other hand, Bharti Group's GR increased by 13.05% (from Rs. 8381.00 crore to Rs. 9475.04 crore).
- The AGR share of Public and Private sector is 31.37% and 68.63% respectively as against 37.41% and 62.59% respectively in the previous quarter.
- The License Fee contribution of BSNL is 25.71% followed by Bharti (25.01%), Vodafone (15.01%) and Reliance (10.79%).
- The Average percentage of Pass Thru to GR is 23.56%. In case of access services, the pass through is highest in case of Tata and Shyam (38%) against the previous quarter's 28.73% and 46% respectively. They are followed by BPL – 29% (24% - previous quarter) and Reliance – 28% (33% - previous quarter).

- Average % of License Fee to AGR is 8.58% and Average % of Spectrum Charges to AGR is 2.76%. (Table 7.1)
- Excluding ISP, the Pass through as % of GR for the ILD service is highest at 51.51% followed by NLD at 26.50% and Access at 20.97%.

Table 24: Comparison of Gross Revenue, Adjusted Gross Revenue (AGR), Licence Fee and Spectrum Charges (IVth Quarter of 2007-08 & Ist Quarter of 2008-09)

(Rs. in Crore)

Gross Revenue		% Change	AGR		% Change	Licence Fee		% Change	Spectrum Charges		% Change
IVth Qtr. (07-08)	Ist Qtr. (08-09)		IVth Qtr. (07-08)	Ist Qtr. (08-09)		IVth Qtr. (07-08)	Ist Qtr. (08-09)		IVth Qtr. (07-08)	Ist Qtr. (08-09)	
35770	**35311**	**-1.3**	**27845**	**26990**	**-3.17**	**2282**	**2316**	**1.49**	**767**	**744**	**-3.00**

Table 25 : Service wise Gross Revenue, Adjusted Gross Revenue (AGR), Licence Fee and Spectrum Charges (Ist Quarter of 2008-09)

(Rs. in Crore)

Service	Ist Qtr of F.Y. 2008-09				% Share			
	GR	AGR	LF	Spectrum Charges	GR	AGR	LF	Spectrum Charges
Access Providers	29675	23451	2104	743.73	84.04	86.89	90.83	99.91
NLD	3185	2341	140	0.16	9.02	8.67	6.06	0.02
ILD	1869	906	54	0.00	5.29	3.36	2.35	0.00
Others (reported)	583	292	18	0.51	1.65	1.08	0.76	0.07
Total	**35311**	**26990**	**2316**	**744**	100%	100%	100%	100%

Table 26: Category-wise Share in the Access Revenue (GR)

Category	Revenue	%
Metro	6193	21%
A	11805	40%
B	9208	31%
C	2468	8%
Total	**29675**	**100%**

Note:

1. Source: Figures are un-audited and as submitted by the Operators.
2. The figures have been regrouped for analysis purpose.
3. The Spectrum charges are now reported on "Payment due for the Quarter" basis. However some operators are reporting on payment basis or on estimate basis on projected AGR for next quarter.
4. Metro area includes Delhi, Mumbai and Kolkata only. Chennai is clubbed with Tamilnadu.
5. VSNL indicates VSNL Broadband Ltd. Rest is now Tata Communications Ltd. and hence, included in Tata Group.

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