Telecom Regulatory Authority of India

The Indian Telecom Services
Performance Indicators October– December 2008

New Delhi, India
1st April 2009

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INTRODUCTION

(i) This report presents the growth trends for the telecom services in India for the quarter ending **December 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, both GSM & CDMA (WLL(F) + WLL(M)) technologies has been combined. The Executive Summary of various Telecom Services has been given in the beginning followed by 'Performance Indicators at a Glance'. First four chapters deliberate the growth pattern of Wireline, Wireless, Internet and Value Added Services (VAS). 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.

(ii) 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.

(iii) 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 & IT), TRAI; Tel. +91-11-23217914, Fax. +91-11-23211998 and e-mail: advcn@trai.gov.in or cn@trai.gov.in

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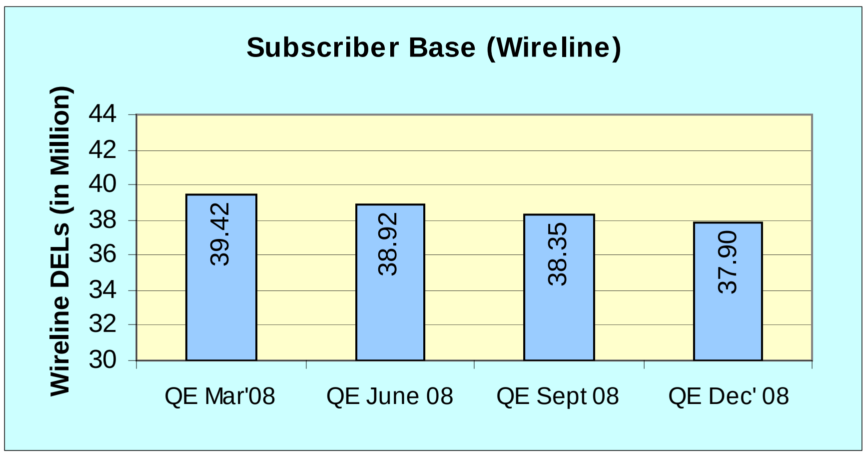
EXECUTIVE SUMMARY

A. Wireline Services

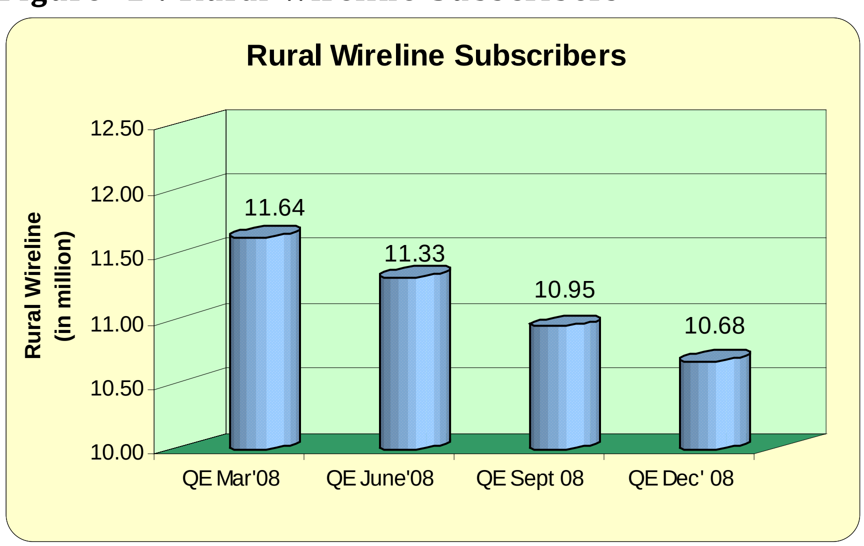
A.1 Wireline services subscriber base stood at 37.90 million in quarter ending December 2008 as compared to 38.35 million in quarter ending September 2008.

Figure –1 : Subscriber Base (Wireline)



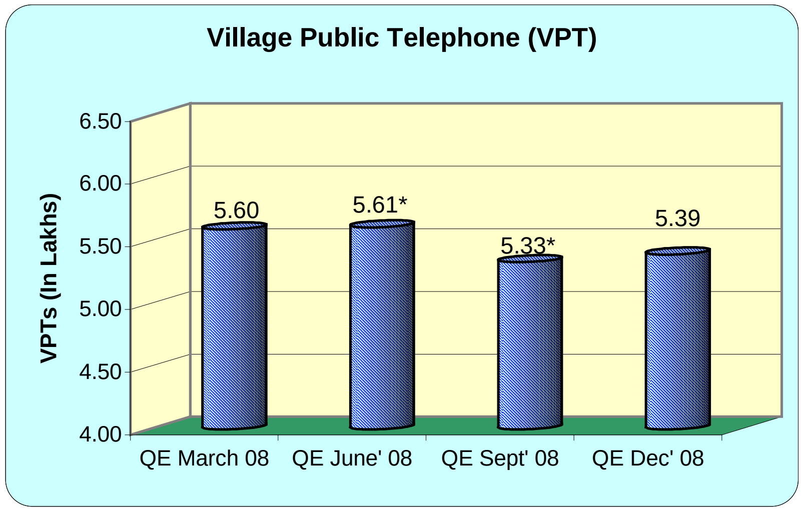
A.2 Rural Wireline Subscriber base stood at 10.68 million in quarter ending December 2008 as compared to 10.95 million in quarter ending September 2008.

Figure- 2 : Rural Wireline Subscribers



A.3 Number of Village Public Telephones (VPTs) have increased from 5.33* lakhs in quarter ending September 2008 to 5.39 lakhs in quarter ending December 2008.

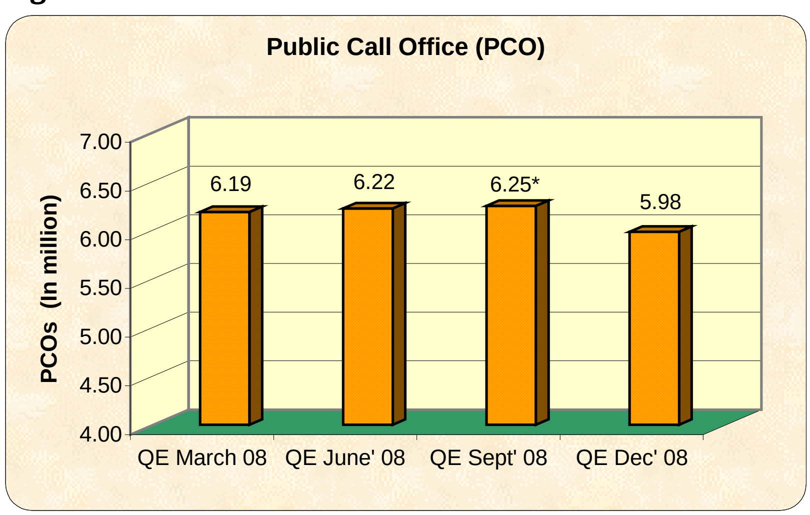
Figure-3 : Village Public Telephone



(*The change in number of VPTs for the QE June'08 & QE September'08 is due to revised information furnished by M/s TATA and clarification given by BSNL)

A.4 Number of Public Call Offices (PCOs) have decreased from 6.25* million in quarter ending September 2008 to 5.98 million in quarter ending December 2008.

Figure-4 : Public Call Office



(*The changes in numbers of PCOs for the QE September 2008 is due to latest information given by MTNL and revised information furnished by M/s TATA)

B. Wireless Services

B.1 The Wireless subscribers have reached 346.89 million as on 31st December 2008 as against 315.31 million subscribers in the previous quarter. During this quarter 31.58 million wireless subscribers were added.

Figure-5 : Wireless Subscribers

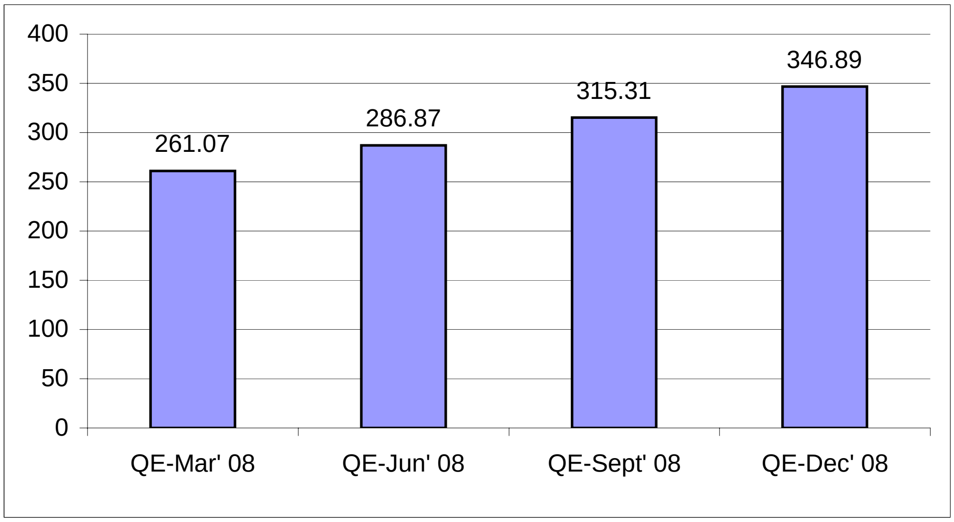
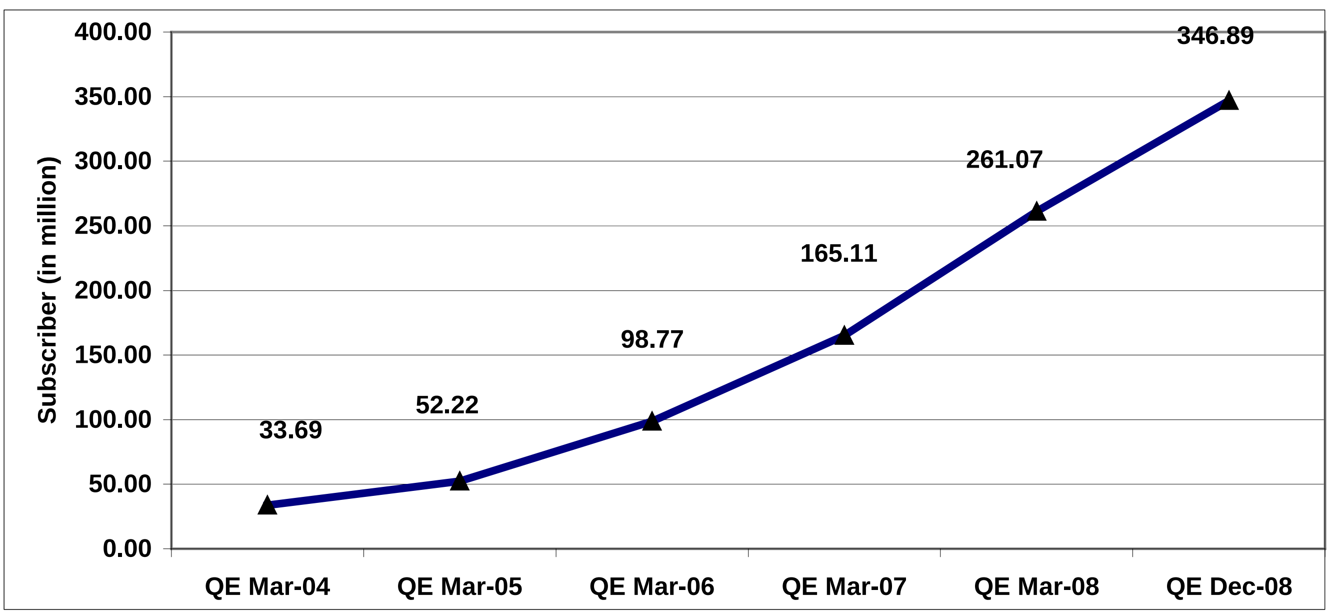


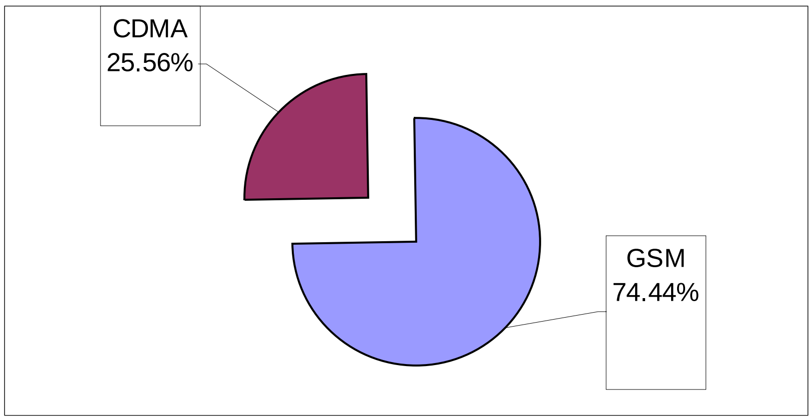
Figure-6: Total Subscriber Base (Wireless)



B.2 **Technology-wise Wireless Market Share**

There are 258.23 million GSM subscribers (74.44%) and 88.66 million CDMA subscribers (25.56%) at the end of December 2008.

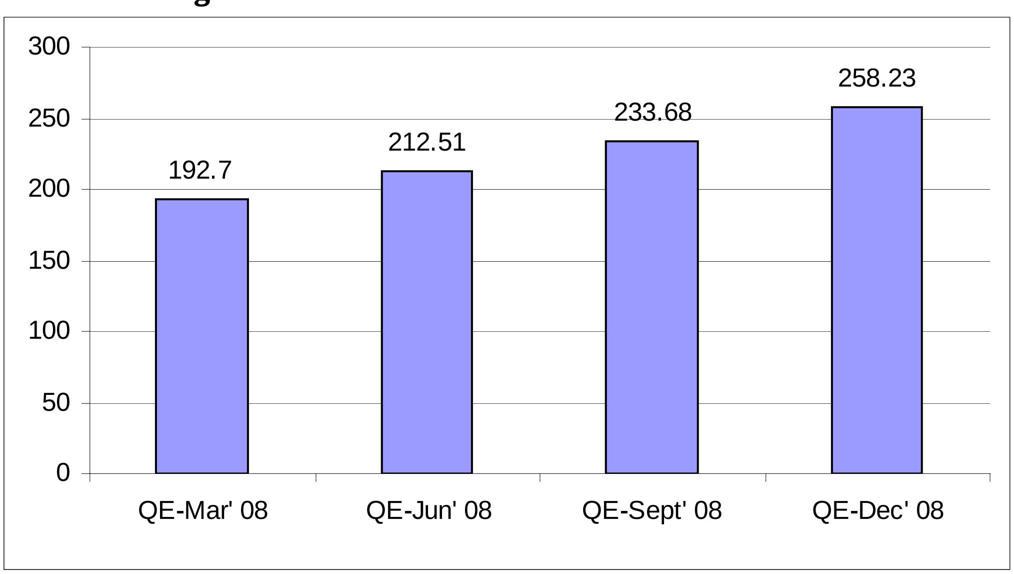
Figure-7: Technology wise Wireless Market Share



B.2.1 **GSM**

The GSM subscriber base has reached 258.23 million in the quarter ending December 2008 as against 233.68 million at the end of the previous quarter.

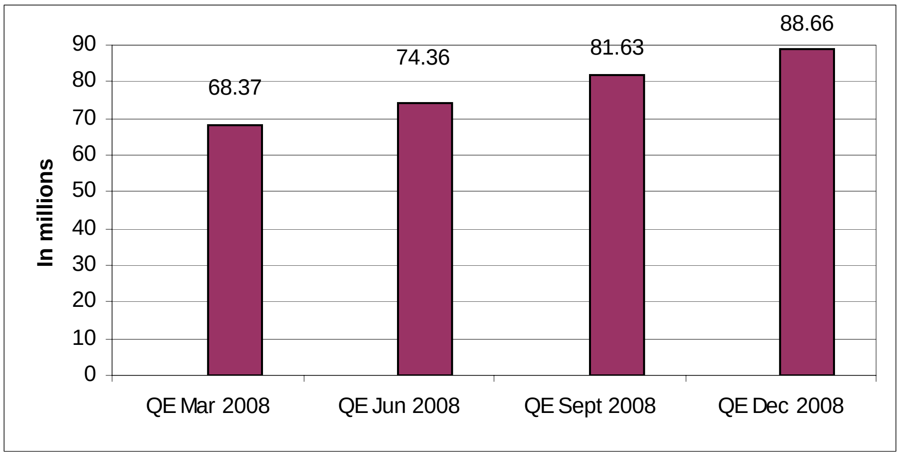
Figure-8 : GSM Subscriber Growth



B.2.2 **CDMA**

The CDMA subscriber base has reached 88.66 million in the quarter ending December 2008 as against 81.63 million at the end of the previous quarter.

Figure-9 : CDMA Subscriber Growth



B.3 **Average Revenue Per User (ARPU), Minutes of Usage (MoU) etc.**

B.3.1 **GSM – Full Mobility Service**

- The all India blended ARPU per month has shown a slight decline of 0.45% from Rs. 221/- in September 2008 to Rs. 220/- in December 2008.
- ARPU for postpaid service has shown a decline of 4.2% from Rs. 584/-in September 2008 to Rs. 559/- in December 2008. On the other hand Prepaid service has shown an increase of 1.6% from Rs. 189/- in September 2008 to Rs. 192/- in December 2008.
- MOU per subscriber continue to show a declining trend. It has declined by 0.56% from 499 in September 2008 to 496 in December 2008. The outgoing MOUs declined by 0.39% and incoming by 0.72%.
- Postpaid segment alone has shown a decline of 1.75% in MOUs per subscriber.
- Total MOU per subscriber for prepaid segment has shown an increase of 0.62%. Outgoing MOUs have increase by 0.95% and incoming by 0.32%.

- Higher decline in Incoming MOUs has turned the overall ratio of incoming-outgoing MOUs from 52:48 in September 2008 to 51:49 in December 2008.
- Outgoing SMS per subscriber continued to show increasing trend from 25 in September 2008 to 29 in December 2008 – an increase of 16%.
- Against the overall trend of decline in MOUs, Circle category "C" has recorded increase in MOU per subscriber from 505 in September 2008 to 522 in December 2008.

Figure-10 : Key Indicators for GSM

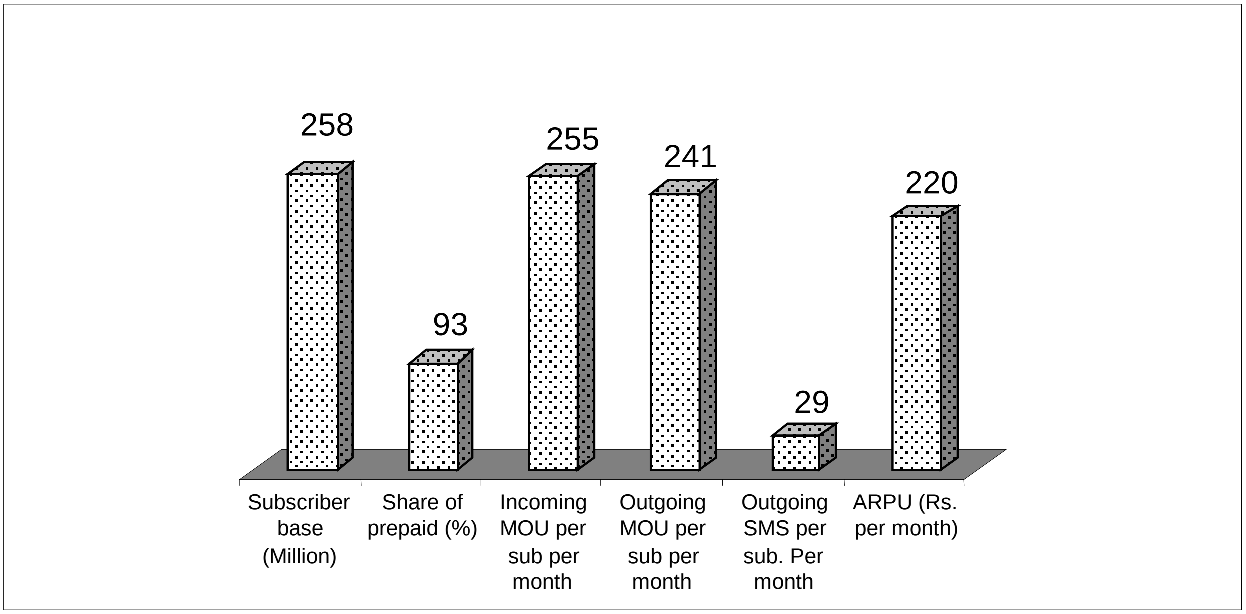


Figure-11 : Variation in Key Indicators over Last Quarter

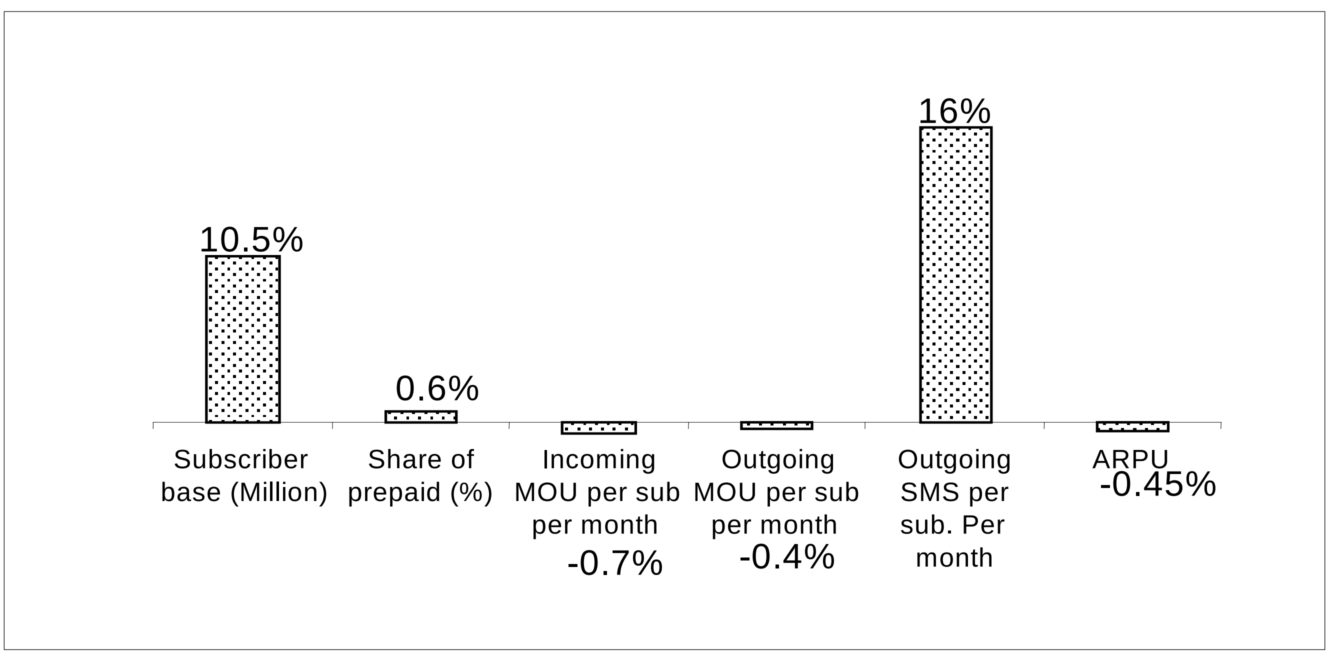
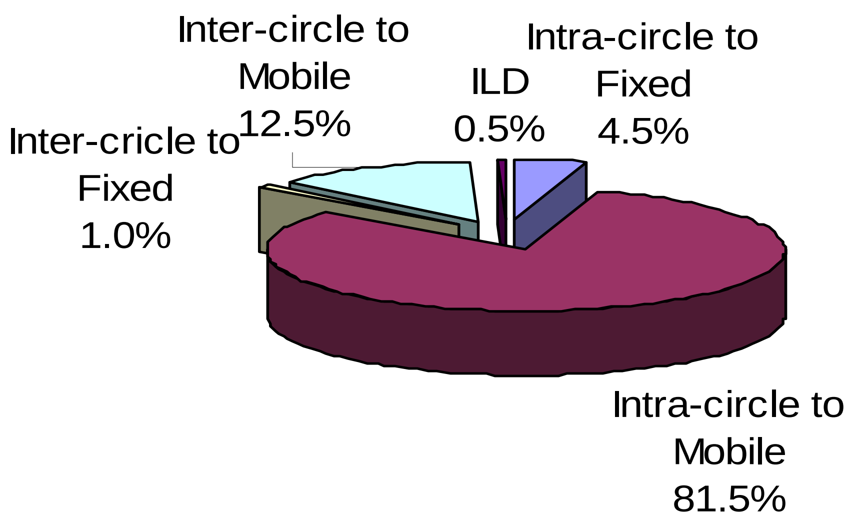


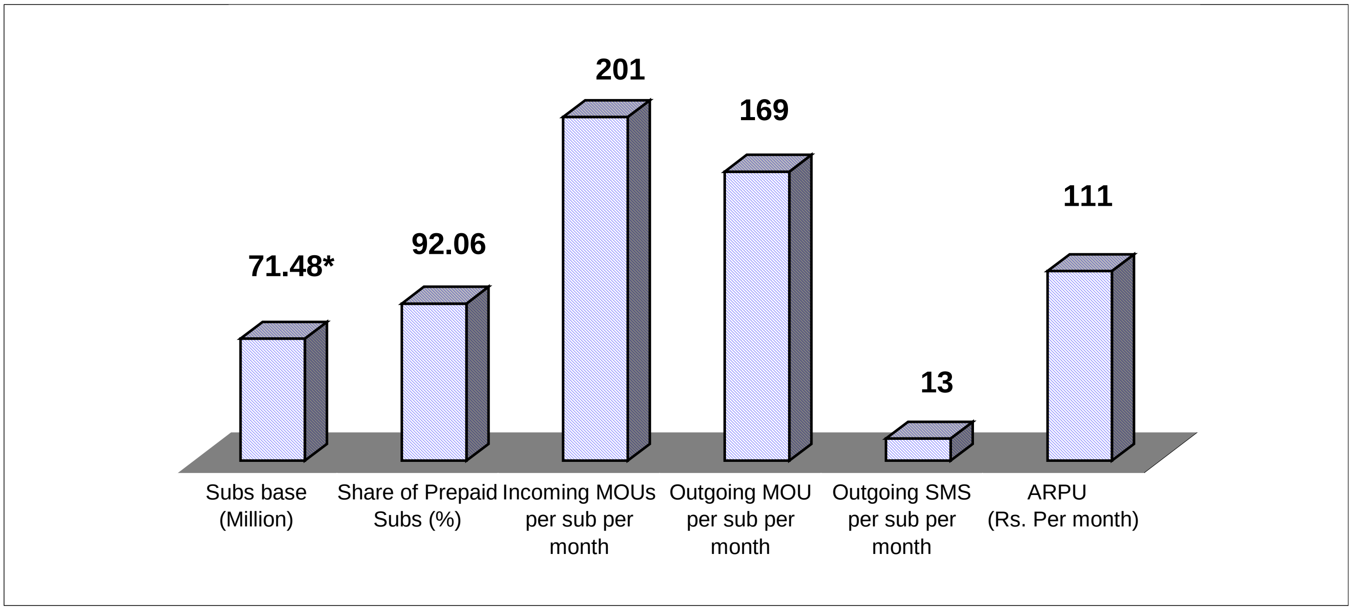
Figure-12: Mobile(GSM) Originated Traffic- distribution by terminating network



B.3.2 **CDMA (Full Mobility)**

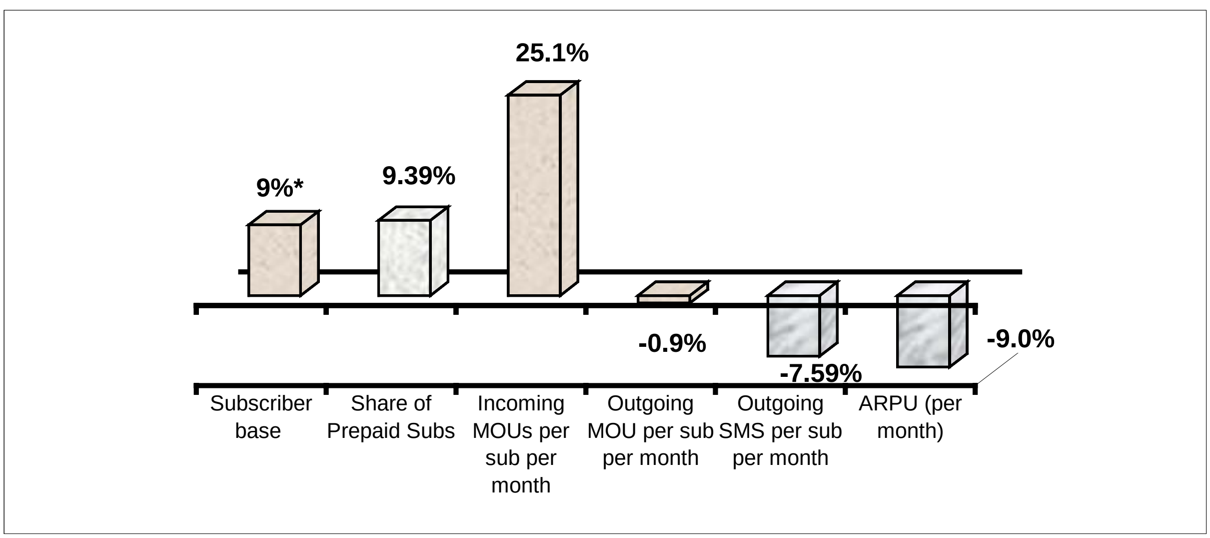
- All India blended ARPU (per month) for the quarter ending December 2008 is Rs.111/- as compared to Rs. 122/- for the quarter ending September 2008.
- The Total MOU per subscriber per month has shown sharp increase from 332 minutes for the quarter ending September 2008 to 370 minutes for the quarter ending December 2008.

Figure-13 : Key Indicators for CDMA



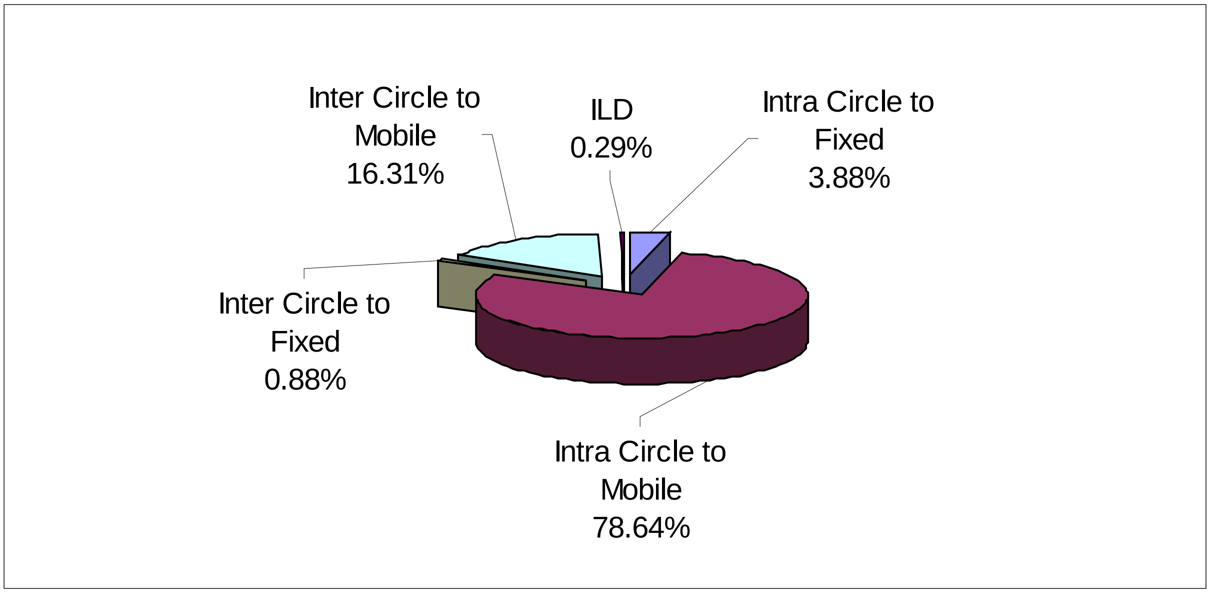
* Does not include WLL (F) & WLL (M) Subscribers.

Figure-14 : Variation in Key Indicators over last quarter



* Does not include WLL (F) & WLL (M) Subscribers.

Figure-15 : Mobile (CDMA) Originated Traffic- distribution by terminating network

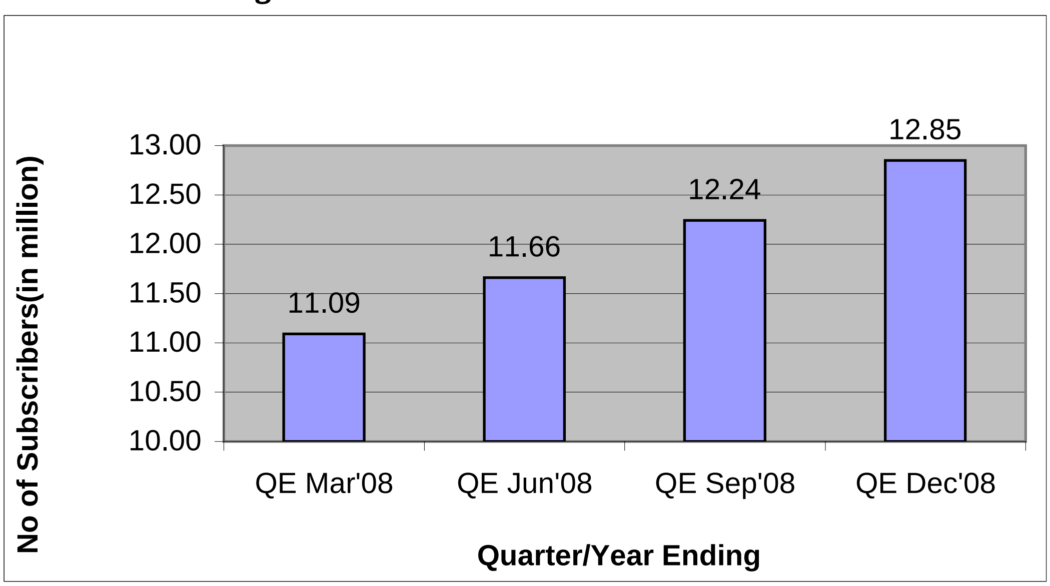


C. Internet Services

C.1 There are 12.85 million Internet subscribers at the end of December 2008 as compared to 12.24 million at the end of September 2008 registering a growth of 5.01%. This growth rate is higher as compared to the growth rate of 4.97% at the end of September 2008.

C.2 Besides above, there are 101.10 million wireless data subscribers at the end of December 2008 (capable of accessing data services including internet through mobile handsets (GSM/ CDMA)).

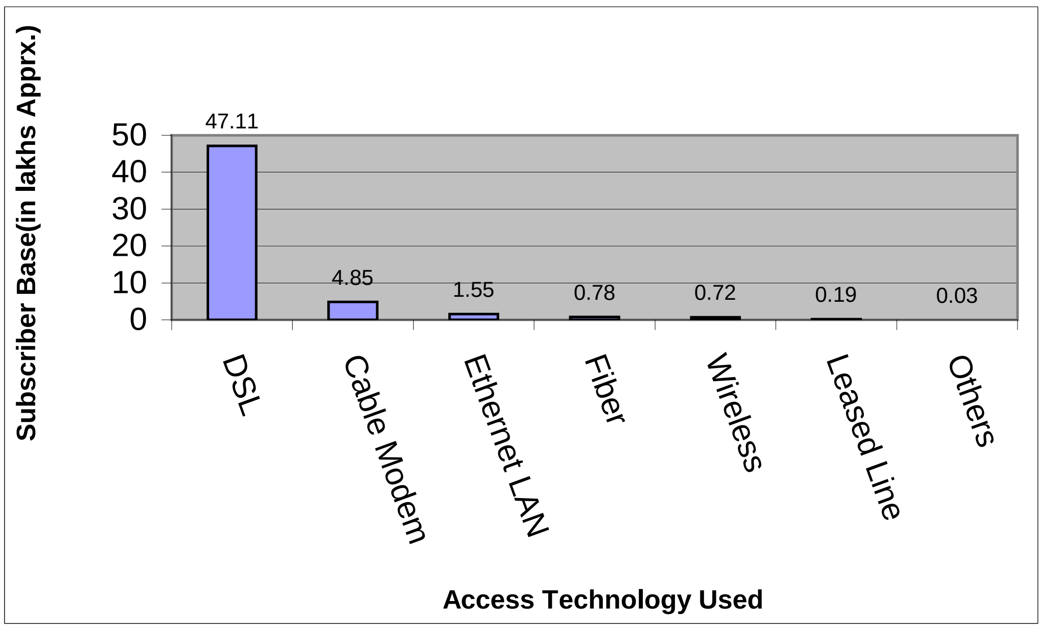
Figure-16 : Internet Subscriber Base



C.3 **Broadband Subscriber Growth** - The number of Broadband subscribers (with a download speed of 256 Kbps or more) was 5.52 million at the end of December 2008 as compared to 4.90 million at the end of September 2008. The growth rate of broadband subscribers in this quarter is 12.65%.

C.4 **Broadband Subscribers Share (Technology wise) –** Out of total 5.52 million broadband subscribers, 4.711 million are DSL based; 0.485 million Cable Modem; 0.155 million Ethernet LAN; 0.078 million Fiber; 0.072 million Wireless, Leased Line 0.019 million and 0.003 million use other technologies.

Figure-17 : Technology Trends for Broadband



D. Quality of Service Performance

D.1 Wireline Services

This report covers 84 licencees 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 Faults incidences, Mean Time to Repair, Metering & Billing credibility, Customer Care Services (Closures and Additional Facilities), Response time to the customer for assistance (i) %age of calls answered (electronically) within 20 sec (ii) %age of calls answered (electronically) within 40 sec (iii) %age of calls answered (voice to voice) within 60 sec (iv) %age of calls answered (voice to voice) within 90 sec and 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 Provision of Telephones, Faults repaired by next working day, Call Completion Rate and Customer Care Services (Shifts)

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

S. No.	Parameters	Benchmark	No. of operators not meeting the benchmarks			
			September, 2008		December, 2008	
			Out of 84 In Nos	Out of 84 In %age	Out of 84 In Nos	Out of 84 In %age
1	**Provision of Telephones after registration of demand**	100% within 7 Days	35	41.67%	41	48.81%
2	**Fault incidences per 100 subs/month**	<3	43	51.19%	36	42.86%
3	**Fault repaired by next working day**	>90%	21	25.00%	24	28.57%
4	**MTTR**	<8Hrs	29	34.52%	21	25.00%
5	**Call Completion Rate (in local network)**	>55%	3	3.57%	4	4.76%
6	**Metering & billing credibility - % of bills**	<0.1%	6	7.14%	2	2.38%
7	**Customer Care Service (95% of requests)**					
(i)	Shifts	<3 Days	12	14.29%	13	15.48%
(ii)	Closures	<24 hrs.	5	5.95%	2	2.38%
(iii)	Additional Facilities	<24 hrs.	12	14.29%	7	8.33%
8	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically)					
	Within 20 sec = 80%	80%	1	1.19%	0	0.00%
	within 40 sec = 95%	95%	2	2.38%	0	0.00%
(ii)	%age of calls answered by operator (voice to voice)					
	Within 60 sec = 80%	80%	4	4.76%	0	0.00%
	within 90 sec = 95%	95%	22	26.19%	3	3.57%

9	**Time taken for refund of deposits after closures**	100% within 60 days	7	8.33%	0	0.00%

D.2 **Wireless Service**

This report covers performance of 95 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. %age of calls answered (electronically) within 20 sec.
3. %age of complaints resolved within 4 weeks.
4. Period of all refunds/payments due to customers from the date of resolution of complaints.

The performance of Wireless Service Providers has improved in this quarter as compared to the previous quarter in respect of the following parameters:-

1. Call Set-Up Success Rate (Within Licensee's Own network)
2. Complaints per 100 bills issued.

The performance has deteriorated in this quarter as compared to the previous quarter related to the parameters like Blocked Call rate (SDCCH/paging channel congestion and TCH Congestion), Call Drop Rate, %age of Connections with good voice quality, Response time to the customer for assistance (i) %age of calls answered (electronically) within 40 seconds (ii) %age of calls answered (voice to voice) within 60 seconds & (iii) %age of calls answered (voice to voice) within 90 seconds.

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

Table 2 : Summary of Performance of Wireless Service Providers

S. N.	**Parameters**	**Benchmark**	**No. of Operators not Meeting the Benchmarks**			
			Quarter Ending September, 2008		**Quarter Ending December, 2008**	
			Out Of 138 (Nos.)	**Out Of 138 (in %)**	**Out Of 140* (Nos.)**	**Out Of 140* (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%**	6	4.35%	5	3.57%
3	**Service access delay**	**<15 Sec**	1	0.72%	1	0.71%

4	**Blocked call rate** (i) SDCCH/paging channel congestion	**<1%**	8	5.80%	13	9.29%
	(ii) TCH Congestion	**<2%**	13	9.42%	15	10.71 %
5	**Call drop rate**	**<3.0%**	0	0.00%	6	4.29%
6	**Connections with good voice quality**	**>95%**	3	2.17%	6	4.29%
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	0.71%
(iii)	%age of calls answered by operator (voice to voice); within 60 seconds = 80%	**80%**	13	9.42%	18	12.86 %
(iv)	%age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	39	28.26%	48	34.29 %
8	**Complaints per 100 bills issued**	**<0.1%**	3	2.17%	2	1.43%
9	**% Of complaints resolved with 4 weeks**	**100%**	0	0.00%	0	0.00%
10	**Period of all Refunds/Payment due to Customers from the date of resolution of complaints as in (9) above**	**<4 Weeks**	0	0.00%	0	0.00%

Note : * M/s Idea Cellular have submitted PMR first time for Bihar and Mumbai service areas in this quarter. So, total number of licensees providing PMR is 140

D.3 **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 (September, 2008). Twelve new service providers are added in this quarter.

This report covers performance of 15 Service Providers providing Broadband vis-à-vis the QoS benchmarks prescribed by TRAI.

E. Broadcasting and Cable Services

E.1 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 180 and 110 respectively. There are 129 pay channels as reported by 19 broadcasters/their distributors in the Quarter ending 31st December 2008.

E.2 Apart from All India Radio, there were 236 FM Radio station in operation as on 30th September 2008. During the quarter ending 31st December 2008, 9 more private FM radio station came into operation. Now, at the end of quarter ending 31st December 2008, 245 private FM Radio stations are in operation.

E.3 No DTH license was issued during the quarter ending 31st December 2008. Therefore, at present, there are 6 private DTH licensees apart from free DTH service of Doordarshan. Out of these 6 licensees, 5 licensees are offering pay DTH services to the customers as on 31.12.2008, while remaining one is in the process of rolling out its services. Total number of reported registered subscribers being served by these five Private DTH operators is 11.1 million at the end of quarter ending 31st December 2008.

E.4 Upto quarter ending 30th September 2008, there were 57 Community Radio Station licensees and out of these, 36 were operational. In the quarter ending 31st December 2008, 3 more licenses were issued and five licensees started their services. Now, in the quarter ending 31st December 2008, out of 60 licensees of community radio stations, 41 stations are in operation.

E.5 At the end of the quarter 30th September 2008, there were 717722 number of set top boxes (STBs) installed in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai. Now, in the quarter ending 31st December 2008, the STB number has increased to 767616 in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai.

E.6 Upto quarter ending 30th September 2008, there were 54 Teleport Service Providers in operation in India. In the quarter ending 31st December 2008, no new license was issued.

F. Financial Details of the Telecom Network

F.1 The Gross Revenue of the Telecom Service Sector for the IIIrd Quarter (October – December 2008) of the financial year 2008-09 was Rs.39408 Crores as against Rs. 37196 Crores for the IInd Quarter (July-September 2008) thereby showing increase by 5.95%. The Adjusted Gross Revenue (AGR) for the Quarter under review is placed at Rs.28,940 Crores as against Rs. 27,357 Crores for the previous quarter thereby showing increase of 5.79%.

F.2 The Gross Revenue and AGR of the Public Sector units in Telecom Sector is Rs.10542 Crores and Rs.8321 Crores respectively in quarter ending December 2008, as against Rs. 10265 Crores and Rs. 8544 Crores for the previous quarter ending September 2008.

F.3 The Gross Revenue and AGR of the Private Sector enterprises in Telecom Sector is placed at Rs.28866 Crores and Rs.20619 Crores respectively in the quarter ending December 2008 as against Rs. 26931 Crores and 18813 Crores for the previous quarter ending September 2008.

F.4 The Share of Public and Private sector enterprises in the total AGR from Telecom Service is 28.75% and 71.25% respectively in quarter ending 2008 as against 31.23% and 68.77% in the previous quarter ending September 2008.

F.5 Overall % of License Fee paid by Telecom Service Providers to AGR is 8.46% in the quarter ending December 2008 as against 8.55% in previous quarter ending September 2008.

F.6 The Pass Thru as % of GR for the ILD services is highest at 46.76% followed by NLD at 27.08% and Access at 23.40% in the quarter ending December 2008.

G. Performance Indicators at a Glance for Quarter ending 31st December 2008

Table 3 : Growth of Wireline & Wireless Services

	QE Dec 2007	QE Mar 2008	QE Jun 2008	QE Sep 2008	QE Dec 2008	%age growth over Dec 2007 (12 months)	%age growth over Mar 2007 (9months)	%age growth over Jun 2008 (6 months)	%age growth over Sep 2008 (3 months)
1) Subscriber's Base (in million)									
i) Wireline	39.25	39.42	38.92	38.35	37.90	-3.44	-3.86	-2.62	-1.17
ii) Wireless	233.62	261.07	286.87	315.31	346.89	48.48	32.87	20.92	10.02
Gross Total	**272.87**	**300.49**	**325.79**	**353.66**	**384.79**	**41.02**	**28.05**	**18.11**	**8.80**
2) Traffic (MOU) (minutes of use/ sub/month)									
Wireless									
i) GSM	464	493	505	499	496	6.90	0.61	-1.78	-0.60
ii) CDMA	375	364	354	332	370	-1.33	1.65	4.52	11.45
3) ARPU (Rs./sub/ month)									
Wireless									
i) GSM	261	264	239	221	220	-15.71	-16.67	-7.95	-0.45
ii) CDMA	176	159	139	122	111	-36.93	-30.19	-20.14	-9.02
4) Teledensity									
Population in million (Estimated)	1143	1146	1150	1154	1158				
i) Wireline	3.43	3.44	3.38	3.32	3.27	-4.58	-4.85	-3.29	-1.42
ii) Wireless	20.44	22.78	24.95	27.32	29.96	46.56	31.50	20.09	9.65
Gross Total	**23.87**	**26.22**	**28.33**	**30.64**	**33.23**	**39.21**	**26.73**	**17.29**	**8.45**

Table 4 : Growth of Internet & Broadband Services

	QE Dec 2007	QE Mar 2008	QE Jun 2008	QE Sep 2008	QE Dec 2008	%age growth over Dec 2007 (12 months)	%age growth over Mar 2007 (9 months)	%age growth over Jun 2008 (6 months)	%age growth over Sep 2008 (3 months)
1) Subscriber's Base (in million)									
i) Internet	10.36	11.09	11.66	12.24	12.85	24.03	15.87	10.21	4.98
ii) Wireless Internet *	57.83	65.50	75.97	88.27	101.10	74.82	54.35	33.08	14.53
ii) **Broadband Connections** (>=256 Kbps download speed)	3.13	3.87	4.38	4.90	5.52	76.36	42.64	26.03	12.65
2) Minutes of Use (Dialup Internet) (MOU/ subs/month)	210	220	225	212.34	214.23	2.01	-2.62	-4.79	0.89
3) ARPU (Dialup Internet) (Rs/subs/month)	210	220	225	213.08	221.97	5.70	0.90	-1.35	4.17

* 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.

H. Performance of Service Providers during the quarter: -

Table 5 : Wireline Subscribers Base(in Million)

1) Wireline Service Providers	QE Dec 2007	QE Mar 2008	QE Jun 2008	QE Sep 2008	QE Dec 2008	%age growth over Dec 2007 (12 months)	%age growth over Mar 2007 (9 months)	%age growth over Jun 2008 (6 months)	%age growth over Sep 2008 (3 months)
BSNL	31.71	31.55	30.87	30.12	29.50	-6.97	-6.50	-4.44	-2.06
MTNL	3.60	3.68	3.63	3.57	3.53	-1.94	-4.08	-2.75	-1.12
Bharti	2.18	2.28	2.39	2.51	2.61	19.72	14.47	9.21	3.98
Reliance	0.78	0.87	0.95	1.02	1.07	37.18	22.99	12.63	4.90
Tata/ Hughes	0.67	0.72	0.77	0.82	0.87	29.85	20.83	12.99	6.10
HFCL	0.15	0.15	0.15	0.15	0.16	6.67	6.67	6.67	6.67
Shyam	0.16	0.16	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Total	**39.25**	**39.42**	**38.92**	**38.35**	**37.90**	**-3.44**	**-3.86**	**-2.62**	**-1.17**

Table 6 : Wireless Subscriber Base (in Million)

Service Providers	QE Dec 2007	QE Mar 2008	QE Jun 2008	QE Sep 2008	QE Dec 2008	%age growth over Dec 2007 (12 months)	%age growth over Mar 2007 (9 months)	%age growth over Jun 2008 (6 months)	%age growth over Sep 2008 (3 months)
Bharti	55.16	61.98	69.38	77.48	85.65	55.28	38.19	23.45	10.54
Reliance	40.96	45.79	50.79	56.05	61.34	49.76	33.96	20.77	9.44
Vodofone	39.86	44.13	49.20	54.63	60.93	52.86	38.07	23.84	11.53
BSNL	36.81	40.79	41.96	43.86	46.23	25.59	13.34	10.18	5.40
Tata Tele	21.74	24.33	26.33	29.33	31.76	46.09	30.54	20.62	8.29
Idea	21.05	24.00	27.19	30.38	34.21	60.52	42.54	25.82	12.61
Aircel	9.43	10.61	11.92	13.88	16.08	70.52	51.56	34.90	15.85
Spice	3.80	4.21	4.55	3.60	3.80	0.00	-9.74	-16.48	5.56
MTNL	3.20	3.53	3.72	3.96	4.19	30.94	18.70	12.63	5.81
BPL	1.24	1.29	1.38	1.66	1.95	57.26	51.16	41.30	17.47
HFCL	0.25	0.30	0.34	0.36	0.38	52.00	26.67	11.76	5.56
Shyam	0.10	0.11	0.11	0.12	0.37	270.00	236.36	236.36	208.33
Total	**233.62**	**261.07**	**286.87**	**315.31**	**346.89**	**48.48**	**32.87**	**20.92**	**10.02**

CHAPTER ONE

PERFORMANCE OF WIRELINE SERVICES

Subscribers Base: -

1.1 The Wireline services were provided by 5 licensed private operators (UASL) in addition to incumbents BSNL and MTNL as on 31st December 2008. List of Wireline Service providers along with their areas of operation is given in the Table 7. The Operator wise details of Wireline Subscriber Base as on 31st December 2008 is given in Table 26.

Table 7: List of Wireline Service Providers along with their Area of Operation

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, Delhi, Gujarat, Haryana, Himachal Pradesh, Karnataka, Kerala, Kolkata, Madhya Pradesh, Orissa, Punjab, Rajasthan, Tamil Nadu(included Chennai), 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

Market Share of Wireline subscriber base.

1.2 As on 31st December 2008, the total subscriber base of fixed (Wireline) lines stood at 37.90 million. The incumbents BSNL and MTNL have 77.84% and 9.32% market share respectively in the subscriber base, while all the five private operators together have 12.83% share. The market share of total Fixed (Wireline) lines is shown in the Figure below:-

Figure 18: Distribution of Market share of Urban + Rural Wireline subscriber

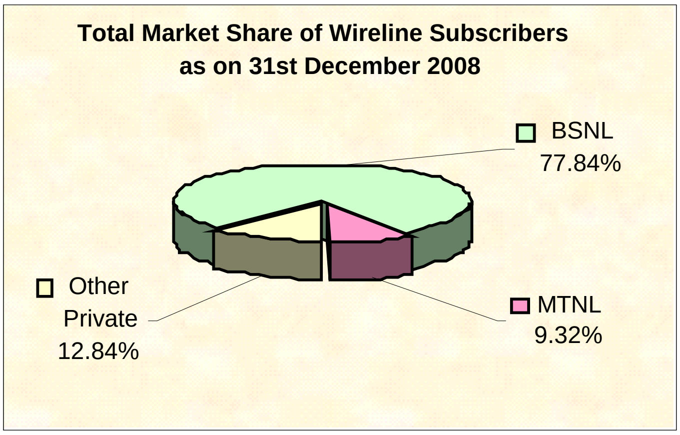


Figure 19 : Distribution of Market share of Urban Wireline subscriber

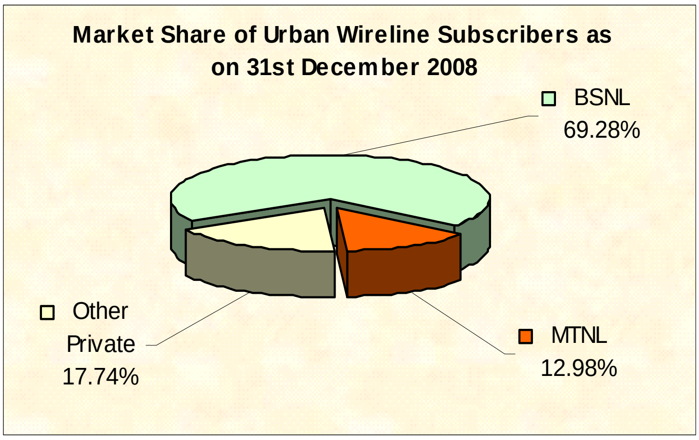
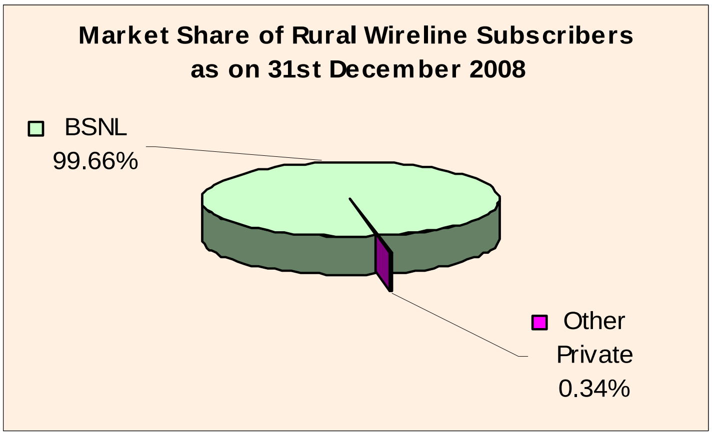


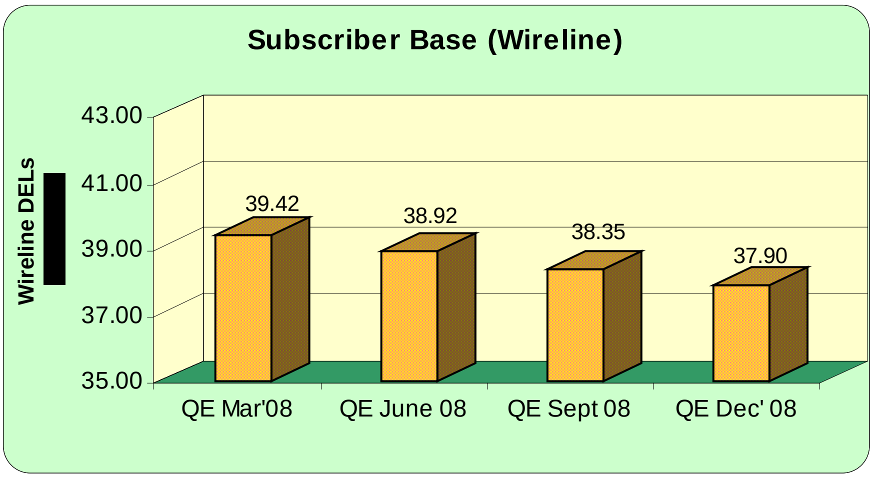
Figure 20 : Distribution of Market share of Rural Wireline subscriber



Subscriber Base of Wireline for last four quarters

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

Figure 21: The subscriber base of the Wireline service sector for last four quarter

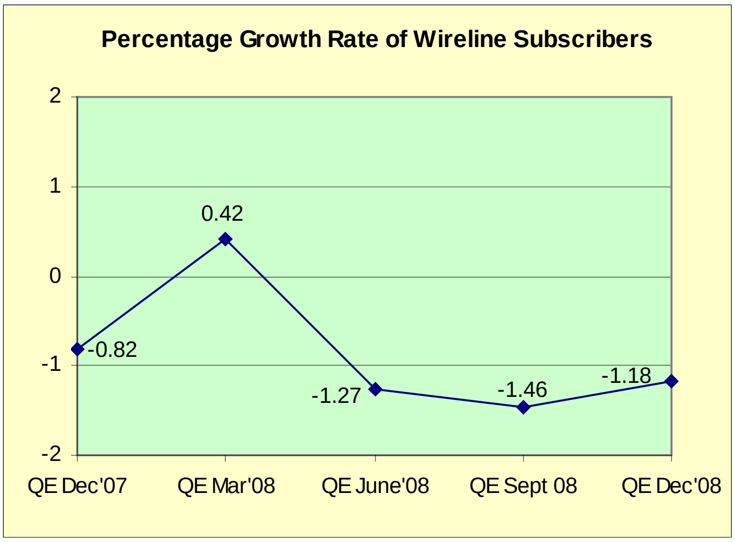


Status of Wireline services

1.4 The Fixed (Wireline) subscriber base registered a decrease of 450,899 lines during the quarter ending December 2008. The net number of fixed lines (wireline) has decreased to 37,898,155 as on 31st December 2008 from 3,83,49,054 in the quarter ending September 2008. The overall percentage decrease in subscriber base during the quarter is 1.18%.

1.5 During the quarter ending 31st December 2008, some service providers have increased their respective wireline subscriber base such as M/s Bharti Airtel Ltd. from 25,09,460 to 26,19,462(+110,002), M/s Tata Teleservices Ltd. (TTL) (including TT(M)L) from 821,602 to 871,351(+49,749), M/s Reliance Communications Ltd. (RCL) from 10,21,484 to 10,74,218 (+52,734) and M/s HFCL Infotel Ltd. from 152,249 to 156,887 (+4,638). The reduction in the subscriber base of Wireline during the quarter ending December' 08 reported by M/s BSNL from 301,22,269 to 295,00,460 (-6,21,809), M/s Shyam Telelink Ltd. from 149,529 to 141,966(-7,563) and M/s MTNL from 35,72,461 to 35,33,811 (-38,650).

Figure 22 : Percentage Growth Rate of Wireline Subscribers



Other Performance Indicators: -

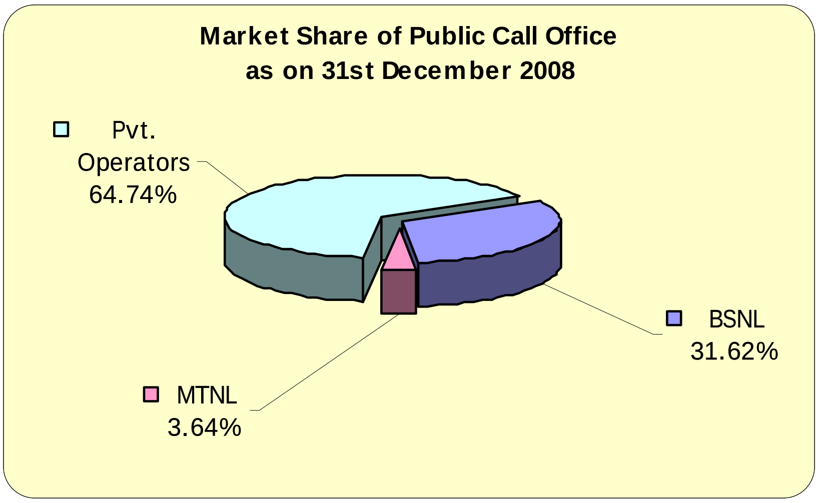
Public Call Offices:

1.6 During the quarter ending December 2008, number of PCOs has decreased by 2,65,471. Total number of PCOs in the country as on 31st December 2008 is 59,82,335 as compared to 62,47,806* in the quarter ending September 2008 . The share of BSNL in is 18,91,508 i.e. 31.62% of the total PCOs. The share of MTNL and other private operators combined is 2,17,903 (3.64%) and 38,72,924 (64.74%) respectively.

Operator-wise (BSNL/MTNL/Other Private Operators) market share of PCO is depicted in the Figure 23. Service area and operator wise details of PCO's are available at Table 27.

(*) The changes in status of PCO is due to information furnished by MTNL & M/s Tata.

Figure 23 : Market Share of Public Call Office as on 31.12.2008

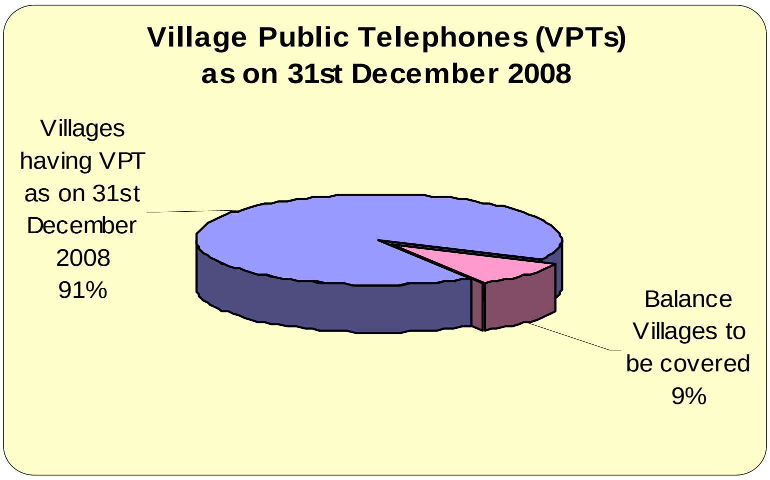


Village Public Telephones (VPT):

1.7 There are 5,93,485 villages in India as per census 2001 as reported by BSNL. During the previous quarter ending 30th September 2008 there were 5,33,402* VPTs in the country whereas by the end of this quarter i.e. 31st December 2008, the total number of VPTs have increased to 5,39,448 Thus 6,046 VPTs have increased during the quarter ending December 2008. The total number of villages left uncovered, are 54,037 as on 31st December 2008. The status of VPT's is depicted in the Figure 24.

(*) The changes in status of VPT is due to information furnished by M/s Tata and clarification given by BSNL.

Figure 24 : Village Public Telephones as on 31.12.2008



Circle-wise and Operator-wise details of village public telephones as on 31st December 2008 and addition/deletion during the quarter are available in Table 28.

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CHAPTER TWO
PERFORMANCE OF WIRELESS SERVICES

Wireless Subscriber Base reached 346.89 million

PART A

Details of service providers:

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

Table 8: List of Wireless Service providers

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 Communications	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)		All India
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	Unitech Group	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, Chennai & TN, KR,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

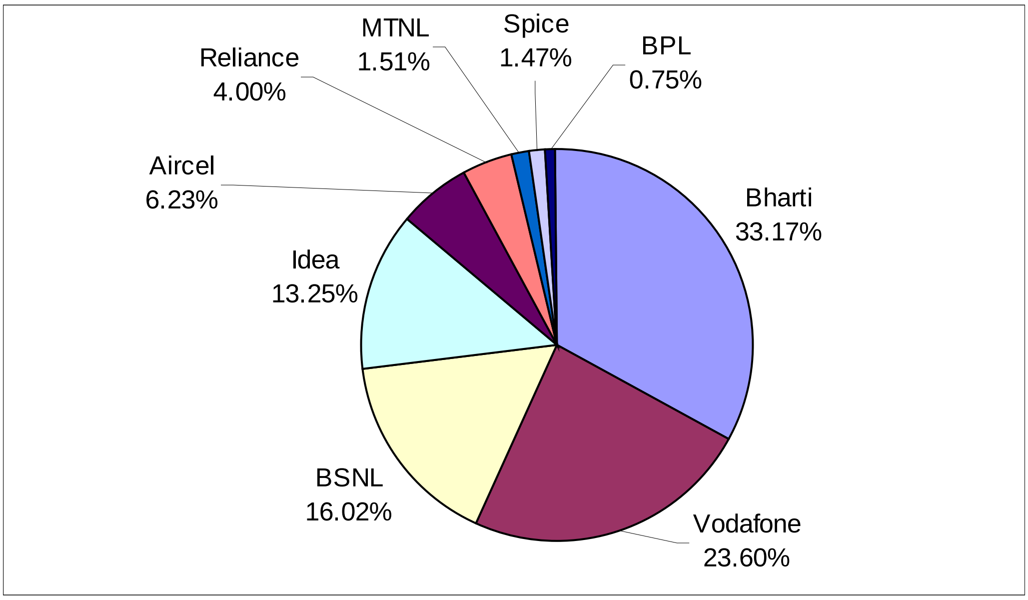
Circle-wise details of all Wireless, Wireline & Unified Access Service providers for the quarter ending December 2008 are given at Annex A & B.

Growth of Subscribers Base: -

GSM

2.2 The GSM subscribers base has reached 258.23 million in the quarter ending 31st December 2008 as against 233.68 million at the end of the previous quarter. The growth rate for this quarter is 10.51%. M/s Bharti with 85.65 -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 60.93 million, 41.36 million and 34.21 million respectively. The market share of different GSM operators is given below:

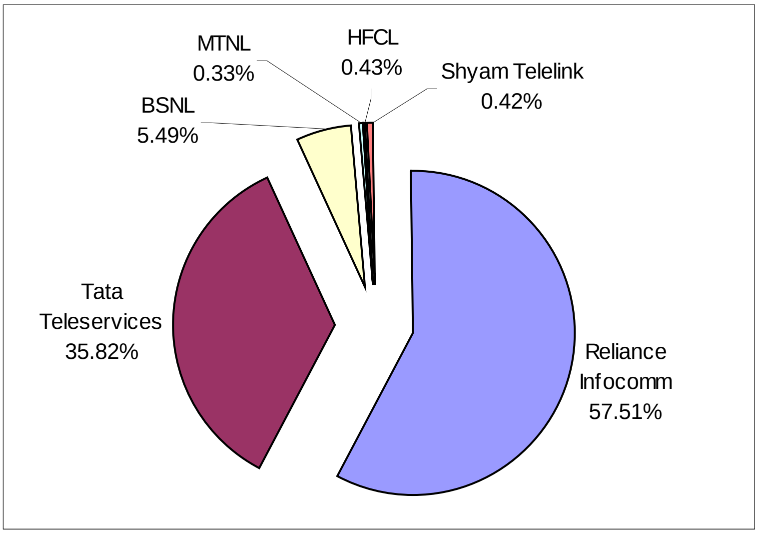
Figure 25 : Operator-wise Market Share of GSM service providers as on 31st December 2008



CDMA

2.3 The CDMA Subscribers Base has reached 88.66 million during the quarter ending December 2008 as against 81.63 million at the end of previous quarter. The growth rate in this quarter is 8.61% as against 9.78% 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 50.99 million, 31.76 million and 4.87 million respectively

Figure 26: Operator-wise Market Share of CDMA Wireless as on 31st December 2008



Wireless Subscriber Base

2.4 At the end of December 2008, the total Wireless Subscribers (Mobile and WLL (F)) has reached 346.89 million as against 315.31 million subscribers at the end of previous quarter.

Addition in Subscribers Base

2.5 During this quarter total 31.58 million subscribers were added. The total subscriber base of 346.89 million comprises of 258.23 million GSM mobile (74.44%) & 88.66 million CDMA Mobile (25.56%). The growth rate in this quarter is 10.02% as against 9.92% in the previous quarter.

Company wise Market Share

2.6 M/s Bharti has maintained its 1st position with a subscriber base of 85.65 million. It has market share of 24.69% w.r.t total subscriber base. M/s Reliance is on 2nd position with a total subscribers base of 61.34 million. M/s Vodafone has started its service in Madhya Pradesh, Himachal Pradesh & Bihar. M/s Tata has started its service in Assam, North East & Jammu & Kashmir and M/s Idea Cellular limited has started its services in Bihar.

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

Table 9: The Wireless Operators on the basis of Market Share

SL NO	Wireless Group	Subscribers Base as on Dec 08 (In millions)	Market Share (in %age)
1	Bharti	85.65	24.69%
2	Reliance	61.34	17.68%
3	Vodafone	60.93	17.56%
4	BSNL	46.23	13.33%
5	Idea	34.21	9.86%
6	Tata	31.76	9.16%
7	Aircel	16.08	4.64%
8	MTNL	4.19	1.21%
9	Spice	3.8	1.10%
10	BPL	1.95	0.56%
11	HFCL	0.38	0.11%
12	Shyam	0.37	0.11%
		346.89	

The details of operator-wise subscribers of GSM and CDMA are given in Table 30 and Table 31.

2.8 Distribution of Subscriber base and market share of Wireless services as on December 2008 among Metros, Circles A to C is given in Table 32, Table 33 and Figure 34.

PART B : ARPU and MoU

GSM (Full Mobility)

Average Revenue Per User (ARPU)

2.9 The all India blended ARPU per month has shown a slight decline of 0.45% from Rs. 221/- in September 2008 to Rs. 220/- in December 2008.

2.10 ARPU for postpaid service has shown a decline of 4.2% from Rs. 584/- in September 2008 to Rs. 559/- in December 2008. On the other hand Prepaid service has shown an increase of 1.6% from Rs. 189/- in September 2008 to Rs. 192/- in December 2008.

2.11 As per the revenue reports furnished by the service providers, revenue from subscribers adjusted for interconnect charges, is about Rs. 16,171 Crores in the quarter ending December 2008 as against Rs. 14,772 Crores in the September 2008 quarter, thereby showing a growth of 9.5%.

Table 10: Growth in Revenue of GSM Service Providers

Period	Revenue* (Rs. in Crores)	Quarterly rate of growth
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%
Jul-08 to Sep-08	14,772	2.0%
Oct-08 to Dec-08	16,171	9.5%

* Net of pass through

Table 11: Average Revenue Per Unit (Rs. per month during the quarter)

Circle	Postpaid	Prepaid	Blended ARPU
Circle A	554	197	225
Circle B	480	187	200
Circle C	514	191	204
Metro	621	194	270
All India	**559**	**192**	**220**
All private SPs	615	196	225
BSNL/MTNL	382	173	195

Table 12: Composition of Revenue (%)

Item	Sep-08	Dec-08
Rental Revenue	19.2%	18.0%
Revenue from Call charges (usage)	59.2%	60.1%
Revenue from Roaming	8.4%	8.9%
Revenue from SMS	4.2%	4.2%
Other Revenues *	8.9%	8.8%

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

Usage Pattern

2.12 MOU per subscriber continue to show a declining trend. It has declined by 0.56% from 499 minutes in September 2008 to 496 minutes in December 2008. The outgoing MOUs declined by 0.39% and incoming by 0.72%.

2.13 Postpaid segment alone has shown a decline of 1.75% in MOUs per subscriber.

2.14 Total MOU per subscriber for prepaid segment has shown an increase of 0.62%. Outgoing MOUs have increase by 0.95% and incoming by 0.32%.

2.15 Higher decline in Incoming MOUs has turned the overall ratio of incoming-outgoing MOUs from 52:48 in September 2008 to 51:49 in December 2008.

2.16 Outgoing SMS per subscriber continued to show increasing trend from 25 in September 2008 to 29 in December 2008 – an increase of 16%.

2.17 Against the overall trend of decline in MOUs, Circle category “C” has recorded increase in MOU per subscriber from 505 in September 2008 to 522 in December 2008.

Detailed data is given in Annex. C.

Average Subscriber outgo (rental + call charges) per minute

2.18 The tariff plans are of bundled nature and the trade-off is generally between monthly fixed charges and Variable (call) charges. The average outgo per outgoing minute (Rental revenue + Airtime revenue per outgoing minute), therefore, is a realistic indicator of tariff levels. Annexure D indicates the average outgo per outgoing minute i.e. Rental revenue + Airtime revenue per outgoing minute.

2.19 All India average outgo per minute has shown a marginal decline from Rs. 0.79 in September 2008 to Rs. 0.78 in December 2008.

CDMA (Full Mobility Service)

ARPU (Average Revenue Per User per month)

2.20 All India blended ARPU per month for the quarter ending December 2008 is Rs. 111/- as compared to Rs. 122/- for the quarter ending September 2008.

2.21 According to the revenue reports submitted by the service providers for the quarter ending December 2008, revenue, net of "pass through", from CDMA full mobility service is Rs. 2276.33 crores which was 2289.33 crores in the quarter ending September 2008 registering a decline of 0.56%.

2.22 The huge difference between postpaid and prepaid ARPU noticed in the last quarter continued to remain valid for the current quarter as well. Postpaid ARPU has been 4.42 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 (3.07 times) and highest in Circle A (4.84 times).

Table 13: Average Revenue Per Uuit (Rs. per month during the quarter)

Circle	Postpaid	Prepaid	Blended ARPU
Circle A	394	81	107
Circle B	344	86	100
Circle C	327	107	115
Metro	423	96	137
All India	**388**	**88**	**111**

Table 14: Composition of Revenue (%)

Item	Sep-08	Dec-08
Rental Revenue	24.3%	24.2%
Revenue from Call Charges (usage)	62.1%	59.3%
Revenue from SMS	2.3%	2.7%
Roaming Revenue	4.0%	5.0%
Other Revenues*	7.3%	8.7%

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

Usage Pattern (Minutes of Usage)

2.23 The total MOU per subscriber/ month has shown increase from 332 minutes (Q.E September 2008) to 370 minutes (Q.E December 2008).

2.24 The O/G MOU per subscriber per month has shown decline from 171 minutes in previous quarter to 169 minutes in the current quarter. Sharp increase has been noticed in incoming MOUs from 161minutes in the previous quarter ending September 2008 to 201 minutes per subscriber in quarter ending December 2008.

2.25 ARPU has also decreased from Rs. 122/- (Q.E September 2008) to Rs. 111/- (Q.E December-2008) for the CDMA operators registering a decline of 9.01%.

Detailed data is given in Annex E.

Average Subscriber Outgo (rental + call charges) Per Minute

2.26 Average Subscriber Outgo per minute (Rental Revenue + Airtime Revenue per outgoing minute) is given in Annex. F. The All India Average Subscriber Outgo per minute is Rs. 0.61/- in December 2008 as against Rs. 0.67/- in September 2008.

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CHAPTER THREE

PERFORMANCE OF INTERNET SERVICES

Service Providers & Subscribers Base: -

3.1 There are 12.85 million Internet subscribers at the end of December 2008 as compared to 12.24 million at the end of September 2008 registering a growth of 5.01%. This growth rate in quarter ending December 2008 is higher than the growth rate of 4.97% at the end of September 2008.

3.2 Among 164 ISPs who reported their subscribers figure for Quarter ending 31st December 2008, Bharat Sanchar Nigam Ltd (BSNL) has retained its top position and reported a subscriber base of 6.70 million Internet subscribers against 6.38 million at the end of last quarter. Mahanagar Telephone Nigam Limited (MTNL) has retained second position with a subscriber's base of nearly 2.02 million. M/s Bharti Airtel Ltd is third with subscriber base of 1.00 million. (Ref. Table 34).

3.3 Besides above, there are 101.10 million wireless subscribers at the end of December 2008 (capable of accessing data services including Internet through mobile handset (GSM/ CDMA)).

Internet Telephony: -

3.4 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 31st December 2008, the list is enclosed as Annex H. Total minutes of usage for Internet Telephony during the quarter were 133.23 million, as compared to 132.66 million for the last quarter.

Market Share: -

3.5 The growth trend of Wireline Internet Subscribers indicates a slight decrease in the market share of PSU owned ISPs vis-à-vis private operators. During the quarter, private ISPs market share has slightly increased to 32.18% as against 31.96% in the preceding quarter. The PSU owned ISPs market share has decreased from 68.04% to 67.82% at the end of December 2008.

3.6 The market share of top 5 ISPs is given in Table 15.

Table 15: Market Share of Top 5 Internet Service Providers

Sl.	ISP	Subs. base	Share in %
1	Bharat Sanchar Nigam Ltd.	6695196	52.08
2	Mahanagar Telephone Nigam Ltd.	2022973	15.74
3	Bharti Airtel Ltd. (Bharti Televentures Ltd.)	1006688	7.83
4	Reliance Communications Infrastructure Limited	940227	7.31
5	Sify Technologies Ltd.	475213	3.70

Among PSU owned ISPs; M/s BSNL has shown an increase of 4.99% in the subscriber base and have 52.08% share of total wireline Internet subscriber base. MTNL is at second position and have a market share of 15.74% Wireline Internet Subscribers.

Figure 27: Internet Subscriber Base as on 31.12.2008

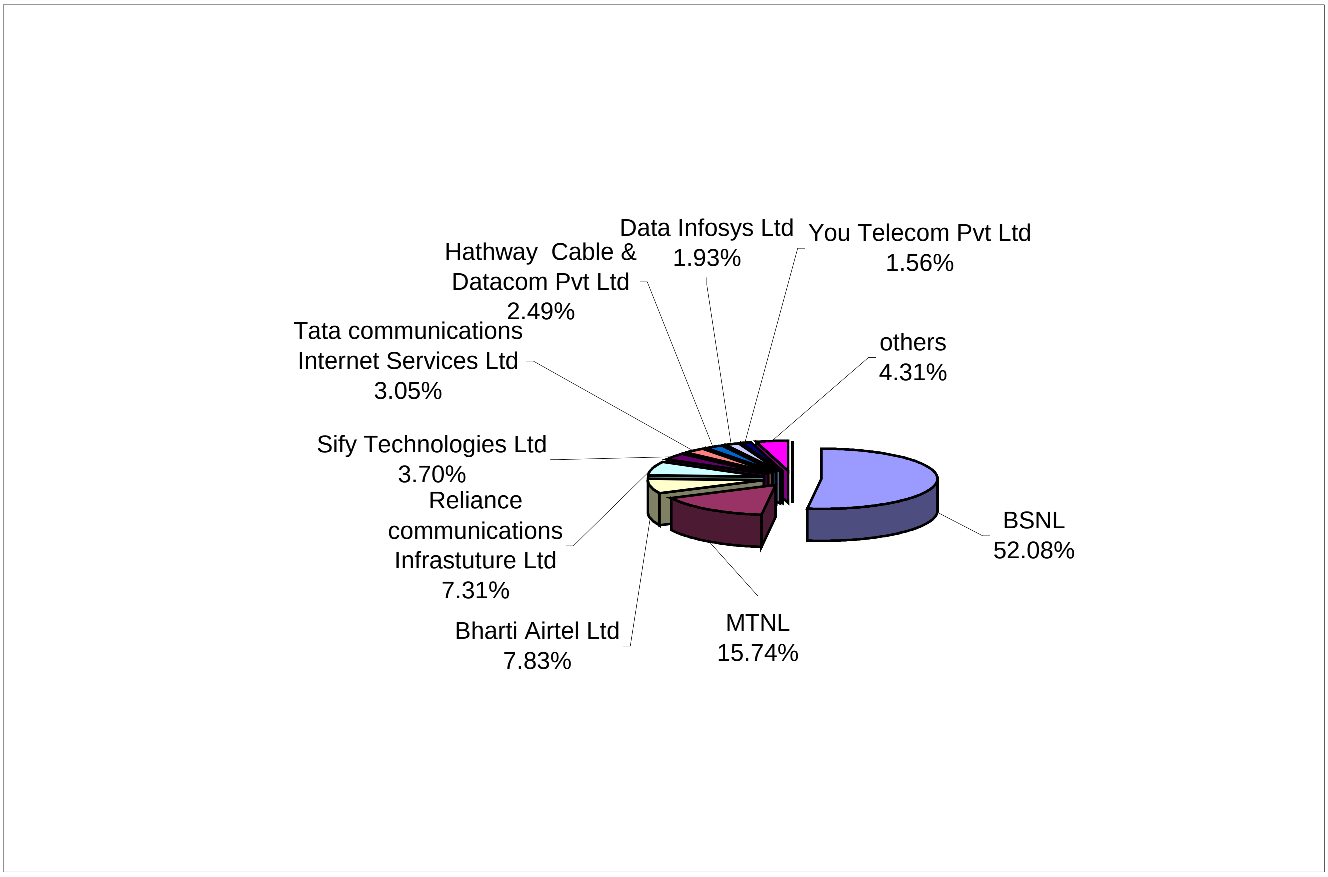
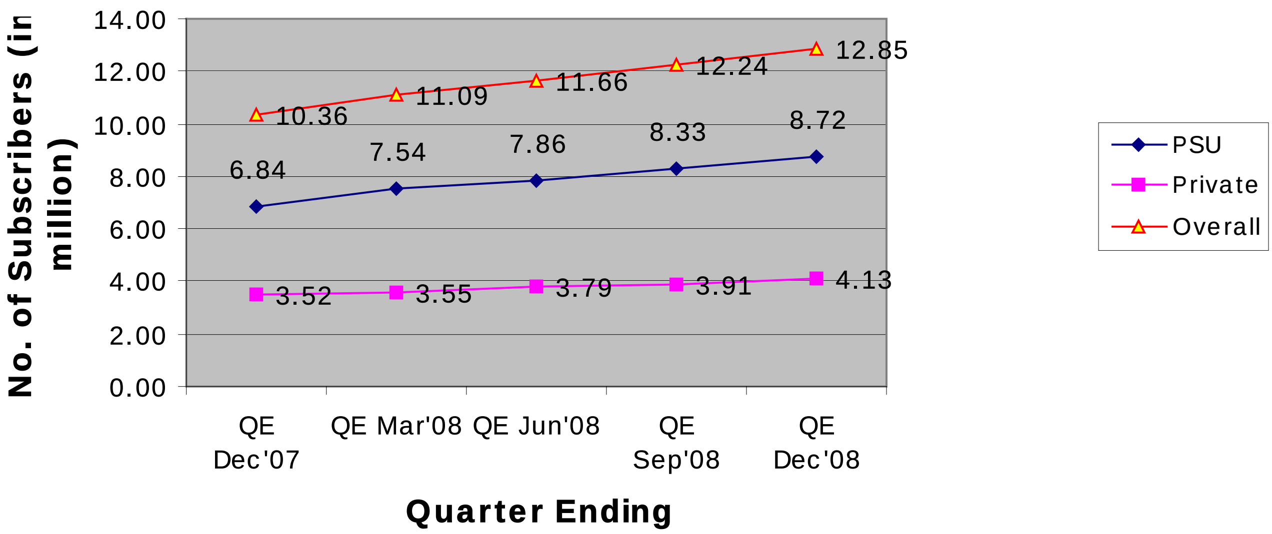
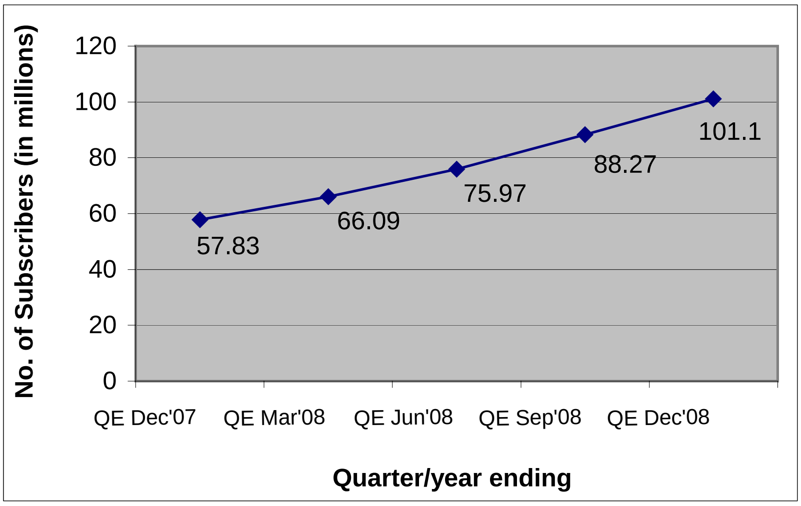


Figure 28 : Growth Trends of Wireline Internet Subscribers



3.7 The growth trend of Wireless Subscribers capable of accessing data services including Internet through their mobile handsets is shown in Figure 29.

Figure 29 : 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.

Leased Lines Connectivity:

3.8 The numbers of Internet Leased Line connections are 24203 at the end of December 2008 as compared to 24076 at the end of September 2008 registering a slight increase of 0.52%.

Broadband Connectivity (>=256 Kbps):

3.9 The number of Broadband subscribers (with a download speed of 256 Kbps or more) was 5524604 at the end of December 2008. Out of these 4711482 are DSL based; 484657 Cable Modem; 155295 Ethernet LAN; 78388 Fibre; 72990 Wireless customers; Leased Line 19131 and 2661 Others.

Company wise market share of Broadband Service Providers:

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

Table 16: Top 10 Service Providers providing Broadband

Sl.No	ISPs Offering Broadband Services	Subscribers Base	Share in %
1	Bharat Sanchar Nigam Ltd.	3007415	54.44
2	Bharti Airtel Ltd.	754342	13.65
3	Mahanagar Telephone Nigam Ltd.	662273	11.99
4	Hathway Cable & Datacom Pvt. Ltd.	254067	4.60
5	Tata Communications	223049	4.04
6	You Telecom India Pvt Ltd	147464	2.67
7	Reliance Comm. Infra. Ltd.	101310	1.83
8	Sify Limited	93807	1.70
9	HFCL Infotel Ltd	54736	0.99
10	Asianet Satellite Communication Limited	53188	0.96
	Sub Total	**5351651**	**96.85%**
	Others	**173953**	**3.15%**
	TOTAL	**5525604**	**100%**

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

3.11 The average minutes of usage per subscriber/ month for dialup subscribers was approximately 214.23 minutes during day time i.e. between 8 a.m to 8 p.m and approximately 104.50 minutes during night time i.e. between 8 p.m to 8 a.m. at the end of December 2008.

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Average Revenue Per User (ARPU) for ISPs:

3.12 The average revenue per user (ARPU) per month for dialup Internet usage was Rs 221.97 at the end of December 2008 as compared to Rs 213.08 at the end of September 2008 having an increase of 4.17%.

International connectivity:

3.13 The bandwidth owned by various ISPs for their ISP operations and Internet Leased lines is reported to be 148 GB for International and 110 GB for National at the end of December 2008.

Revenue of ISP Operators:

3.14 The total Revenue of the Internet Service Sector as reported by ISPs was Rs.2076.07 crores at the end of December 2008 as compared to Rs. 1402.94 crores at the end of September 2008 showing an increase of 30.09%.

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CHAPTER FOUR

PERFORMANCE OF VALUE ADDED SERVICES

Public Mobile Radio Trunk Service (PMRTS): -

4.1 The subscriber base of PMRTS decreased from, 34846 in September 2008 to 33632 in December 2008 registering a negative growth of 3.48%.

4.2 It has been observed that M/s Arvind Mills Limited leads the tally of subscribers with a subscriber base of 11410 followed by M/s Procall (8583), M/s Quick Calls India Pvt. Ltd (3314), M/s.Smartalk Pvt. Ltd (2449), M/s United Liner Agencies of India (2073), M/s Arya Doot Transport Pvt Ltd(1796), M/s.Bhilwara Telenet Services Pvt. Ltd. (1456). M/s. Arya Offshore Services Pvt. Ltd. (1203), M/s. German Express Shipping Agencies of (India) Pvt. Ltd.(767), M/s Jet-Aiu Skyline Transport (455),M/s India Satcom(120) and M/s Container Movement Transport Pvt Ltd (6)., Operative area Delhi leads the tally with 8896 subscribers followed by Mumbai, Bangalore and Chennai with 5082, 4783 and 4110 subscribers respectively which accounted for 68.00% of the total subscribers.

4.3 M/s. India Satcom have registered maximum negative growth rate of 20.00% in their subscriber base followed by M/s. Quick Calls (-13.43%). M/s Arya Offshore Services (-7.03%), M/s. Jet-Aiu Skyline Transport (-5.41%), M/s Smartalk(-4.34%), M/s Arvind Mills(-2.87%), M/s Procall Ltd (-2.23%), M/s German Express Shipping Agency (-1.41%), and M/s Bhilwara Telenet (-0.34%).

The subscriber base of service providers of PMRTS is given in Table 35.

VSAT services: -

4.4 VSAT services are being provided by 9 VSAT Service Providers.

4.5 In this quarter, there was an addition of 599 new subscribers. The total number of subscribers increased from 94436 in September,2008 to 95035 in December,2008, registering a growth of 0.63% as against the growth rate of 5.08% in quarter ended September, 2008

4.6 M/s Hughes Communication Limited is the market leader with subscriber base 27825 followed by M/s HCL Comnet with 25634 and M/s Bharti Airtel Limited Bangalore with 25068 VSAT subscribers respectively.

4.7 M/s Hughes Communication Ltd.& M/s ITI have registered negative growth of 6.22% and 17.78% respectively in this quarter.

4.8 M/s BSNL has the highest growth rate of 15.16% in this quarter.

4.9 There is no change in the subscriber base for the VSAT operators M/s GNFC.

4.10 The number of subscribers of each service provider from quarter ending December 2007 to December 2008 along with the Market Share in terms of Percentage of Subscribers as on 31.12.2008 is given in Table 36.

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CHAPTER FIVE

QUALITY OF SERVICE (QoS) PERFORMANCE

Quality of Service performance of Wireline Service Operators:

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

5.2 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 17 below:

Table 17: The status of Wireline Service Providers who have not met the benchmarks

S. No.	Parameters	Benchmark	No. of operators not meeting the benchmarks			
			September, 2008		December, 2008	
			Out of 84 In Nos	Out of 84 In %age	Out of 84 In Nos	Out of 84 In %age
1	**Provision of Telephones after registration of demand**	100% within 7 Days	35	41.67%	41	48.81%
2	**Fault incidences per 100 subs/month**	<3	43	51.19%	36	42.86%
3	**Fault repaired by next working day**	>90%	21	25.00%	24	28.57%
4	**MTTR**	<8Hrs	29	34.52%	21	25.00%
5	**Call Completion Rate (in local network)**	>55%	3	3.57%	4	4.76%
6	**Metering & billing credibility - % of bills**	<0.1%	6	7.14%	2	2.38%
7	**Customer Care Service (95% of requests)**					
(i)	Shifts	<3 Days	12	14.29%	13	15.48%
(ii)	Closures	<24 hrs.	5	5.95%	2	2.38%
(iii)	Additional Facilities	<24 hrs.	12	14.29%	7	8.33%
8	**Response time to the customer for assistance**					
(i)	%age of calls answered (electronically)					
	Within 20 sec = 80%	80%	1	1.19%	0	0.00%
	within 40 sec = 95%	95%	2	2.38%	0	0.00%
(ii)	%age of calls answered by operator (voice to voice)					
	Within 60 sec = 80%	80%	4	4.76%	0	0.00%

	within 90 sec = 95%	95%	22	26.19%	3	3.57%
9	**Time taken for refund of deposits after closures**	100% within 60 days	7	8.33%	0	0.00%

Table 18:The Parameter wise Performance of Wireline Service Providers

Parameters	Benchmarks	Service Providers not meeting the Benchmarks
Provision of Telephones after registration of demand	**100% within 7 Days**	**BSNL =** AP (91.62%), GJ (98.35%), MH (86.04%), PB (97.82%), HR (99.31%), KTK (99.74%), A&N (88.12%), Assam (99.01%), Chennai (99.47%), Jharkhand (98.40%), Kerala (93.80%), Kolkata (98.61%), NE-I (88.94%), Orissa (99.44%), UP-E (99.22%), UP-W (94.51%), Uttaranchal (98.84%) **MTNL =** Delhi (99.17%), Mumbai (95.25%) **Reliance =** AP (87.61%), Delhi (44.92%), MH (73.68%), TN (86.25%), KTK (44.08%), Chennai (50.16%), KR (83.91%), Kolkata (58.76%), Mumbai (40.80%), UP-E (97.50%) **Tata =** AP (95.74%), Delhi (98.11%), GJ (95.45%), MH (83.33%), PB (98.26%), HR (92.06%), KTK (92.80%), Kolkata (99.76%), Mumbai (90.50%), UP-W (87.50%) **HFCL =** Punjab (98.58%) **Shyam =** Rajasthan (99.42%)
Fault incidences per 100 subs/month	**<3**	**BSNL =** AP (3.90), Bihar (4.70), GJ (5.40), Chhattisgarh (6.90), MP (3.90), MH (7.00), PB (7.90), RJ (5.40), TN (3.01), HR (5.00), KTK (5.50), A&N (5.60), Assam (6.60), Chennai (3.56), HP (8.90), Jharkahand (3.90), J&K (8.30), KR (6.90), Kolkata (4.00), NE-I (4.40), NE-II (4.20), Orissa (4.30), UP-E (5.40), UP-W (7.00), Uttaranchal (5.70), WB (5.40) **MTNL =** Delhi (5.88), Mumbai (9.69) **Reliance** = UP –E (7.19) **Bharti =** AP (5.00), MP (7.00), TN (6.00), KTK (4.00), UP-E (3.25), UP-W (3.46) **HFCL =** Punjab (4.47)
Fault repaired by next working day	**>90%**	**BSNL =** AP (89.17%), Bihar (77.69%), MH (89.34%), PB (87.23%), A&N (80.26%), Assam (79.69%), HP (87.16%), Jharkhand (89.94%), J&K (73.69%), KR (84.59%), Kolkata (87.98%), NE-II (85.15%), WB (81.83%) **Tata =** AP (84.77%), Delhi (84.00%), MH (83.33%), PB (86.00%), HR (43.00%), UP-E (69.00%), UP-W (57.00%) **Reliance** = MH (73.66%), Kolkata

		(65.20%) **Bharti =** TN (87.00%) **Shyam =**Rajasthan (87.00%)
MTTR	**<8Hrs**	**BSNL =** AP (14.54 hrs.), Bihar (8.42 hrs.), Chhattisgarh (9.50 hrs.), MH (8.62 hrs.), PB (14.08 hrs.), KTK (9.26 hrs.), Chennai (8.48 hrs.), Jharkahand (8.07 hrs.), KR (17.67 hrs.), Kolkata (10.17 hrs.), NE-I (14.59 hrs.), NE-II (8.57 hrs.), Orissa (8.27 hrs), WB (9.05 hrs.) **MTNL =** Mumbai (12.93 hrs) **Tata =** Delhi (9 hrs.), PB (24 hrs.), HR (187 hrs.), UP-E (31 hrs.), UP-W (50 hrs.)
Call Completion Rate (in local network)	**>55%**	**BSNL =** J&K (54.12%), Kolkata (53.00%), NE-II (52.40%) **MTNL =** Delhi (50.81%)
Metering & billing credibility - % of bills	**<0.1%**	**Tata =** MH (0.325%), Mumbai (0.245%)
Customer Care Service (95% of requests)		
Shifts	**<3 Days**	**BSNL =** AP (85.00%), MH (89.00%), A&N (88.00%), Assam (94.00%), KR (87.00%), NE-I (86.00%) **MTNL =** Delhi (90.30%), Mumbai (88.79%) **Tata =** AP (84.86%), Delhi (33.33%), GJ (77.78%), KTK (72.63%), Chennai (50.00%)
Closures	**<24 hrs.**	**BSNL =** AP (93.67%), A&N (92.01%)
Additional Facilities	**<24 hrs.**	**BSNL =** AP (87.65%), A&N (90.91%), J&K (92.70%) **MTNL =** Delhi (91.33%) **Tata** = HR (90.70%), UP-W (93.33%) **Bharti =** HR (88.00%)
Response time to the customer for assistance		
%age of calls answered electronically		
Within 20 sec = 80%	**80%**	**All the Operators meet this Benchmark**
Within 40 sec = 95%	**95%**	**All the Operators meet this Benchmark**
%age of calls answered by operator (voice to voice)		
Within 60 sec = 80%	**80%**	**All the Operators meet this Benchmark**

within 90 sec = 95%	**95%**	**MTNL** = Mumbai (83.74%) **Tata =** MH (88.00%), Mumbai (88.30%)
Time taken for refund of deposits after closures	**100% within 60 days**	**All the Operators meet this Benchmark**

Quality of Service performance of Wireless Service Providers for quarter ending 31st December 2008: -

5.3 This report covers performance of 95 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 19 below:

Table 19: Performance of Wireless Service Providers not meeting the benchmarks

S. N.	Parameters	Benchmark	No. of Operators not Meeting the Benchmarks			
			Quarter Ending September, 2008		Quarter Ending December, 2008	
			Out Of 138 (Nos.)	Out Of 138 (in %)	Out Of 140* (Nos.)	Out Of 140* (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%**	6	4.35%	5	3.57%
3	**Service access delay**	**<15 Sec**	1	0.72%	1	0.71%
4	**Blocked call rate** (i) SDCCH/paging channel congestion	**<1%**	8	5.80%	13	9.29%
	(ii) TCH Congestion	**<2%**	13	9.42%	15	10.71 %
5	**Call drop rate**	**<3.0%**	0	0.00%	6	4.29%
6	**Connections with good voice quality**	**>95%**	3	2.17%	6	4.29%
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	0.71%
(iii)	%age of calls answered by operator (voice to voice); within 60 seconds = 80%	**80%**	13	9.42%	18	12.86 %
(iv)	%age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	39	28.26%	48	34.29 %
8	**Complaints per 100 bills issued**	**<0.1%**	3	2.17%	2	1.43%
9	**% Of complaints resolved with 4 weeks**	**100%**	0	0.00%	0	0.00%
10	**Period of all Refunds/Payment due to Customers from the date of resolution of complaints as in (9) above**	**<4 Weeks**	0	0.00%	0	0.00%

Note : * M/s Idea Cellular have submitted PMR first time for Bihar and Mumbai service areas in this quarter. So, total no. of licensees providing PMR is 140

Table 20: The Parameter wise Performance of Wireless Service Providers

Parameters	Benchmark	Service Providers not meeting the Benchmarks
Accumulated down time of Community Isolation	**<24 hrs**	**All the Operators meet this Benchmark**
Call Set-Up Success Rate (Within Licensee's Own network)	**>95%**	**Bharti Airtel** – KTK (93.87%), UP-E (93.51%), WB (93.61%), Assam (94.82%), NE (80.59%)
Service Access Delay	**<15 sec.**	**Bharti Airtel** – AP (16.20 sec.)
Blocked call rate (i) SDCCH/paging channel congestion	**<1%**	**Bharti Airtel** – KTK (2.68%), UP-E (1.30%), RJ (1.44%), WB (2.55%), Bihar (6.46%), Assam (1.83%), NE (4.51%) **Dishnet -** WB (1.49%), Bihar (8.27%), Assam (2.87%), J&K (4.64%), NE (7.48%) **BPL -** Mumbai (1.56%)
(ii) TCH Congestion	**<2%**	**BSNL -** MH (2.53%), AP (2.30%) **MTNL** - Delhi (3.20%) – GSM Service **Bharti Airtel** - KTK (4.74%), UP-E (2.80%), WB (2.35%), Bihar (3.79%), NE (5.66%) **Dishnet** - WB (3.27%), Bihar (5.71%), Assam (2.50%), J&K (2.65%), NE (8.17%), Kolkata (2.50%) **BPL** - Mumbai (2.92%)
Call Drop Rate	**<3%**	**Bharti Airtel** - Bihar (3.15%), NE (3.26%) **Dishnet** - WB (3.54%), Bihar (3.21%), J&K (3.41%), NE (3.39%)
Connections with good voice quality	**>95%**	**Bharti Airtel** - KTK (88.05%), NE (93.59%) **Dishnet** - WB (94.12%), Assam (90.53%), J&K (94.94%), NE (92.71%)
Response time to the customer for assistance %age of calls answered **(electronically)** within 20 seconds = 80%	**80%**	**All the Operators meet this Benchmark**
%Age of calls answered **(electronically)** within 40 seconds = 95%	**95%**	**BSNL** - UP-E (92%)
%Age of calls answered by operator **(voice to voice);** within 60 seconds = 80%	**80%**	**BSNL** - AP (62.00%), KTK (72.00%) **Bharti Airtel -** HR (53.14%), UP-E (72.69%), J&K (76.93%) **RCOM** - TN (77.27%), UP-E (43.04%), Bihar (60.76%), Chennai (78.98%) **RTL -** WB (74.71%), HP (70.34%), Bihar (61.87%) **SPICE** – PB (39.00%) **Idea -** GJ (55.00%) **Dishnet** - Bihar (65.00%), J&K (59.00%) **Aircel** - TN (53.00%) **HFCL** - PB (93.67%)

%Age of calls answered by operator (voice to voice); within 90 seconds = 95%	**95%**	**BSNL –** AP (72.00%), KTK (80.00%), KR (89.00%), UP-E (94.00%), Assam (90.00%), Chennai (94.00%) **Bharti Airtel** - TN (94.72%), HR (68.75%), UP-W (93.67%), UP-E (80.72%), WB (94.95%), Orissa (92.90%), J&K (87.17%), NE (94.98%), Kolkata (94.65%) **RCOM -** MH (94.48%), GJ (94.64%), AP (90.05%), TN (84.74%), KR (94.81%), PB (91.71%), HR (87.91%), UP-W (91.94%), UP-E (44.75%), WB (90.93%), RJ (91.21%), HP (91.71%), Bihar (65.07%), Delhi (81.65%), Chennai (86.26%), Kolkata (90.93%) **RTL** - HP (82.57%), Bihar (70.49%), Kolkata (93.27%) **Tata Tele** - TN (91.01%), UP-W (88.09%), WB (93.39%), Bihar (92.79%), Delhi (90.69%), Chennai (91.51%), Kolkata (93.10%) **SPICE** –PB (44.00%) **Idea** – GJ (66.00%), UP-W (94.00%) **Dishnet** - Bihar (80.00%), J&K (67.00%), Kolkata (92.00%) **Aircel** - TN (47.00%)
Complaints per 100 bills issued	**<0.1%**	**Idea** - Mumbai (0.750%) **Aircel** - Chennai (0.2%)
% Of complaints resolved within 4 weeks	**100%**	**All the Operators meet this Benchmark**
Period of all Refunds/Payment due to Customers from the date of resolution of complaints	**<4 Weeks**	**All the Operators meet this Benchmark**

Some of the Service Providers are having major problems in achieving the benchmarks in respect of parameters (i) Blocked Call Rate (SDCCH & TCH Congestion), (ii) Call Drop Rate, (iii) %age of Connection with good voice quality, (iii) %age of calls answered by operator (voice to voice); within 60 seconds (iv) %Age of calls answered by operator (voice to voice); within 90 seconds.

Details of Quality of Service Parameters :

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

5.5 The Comparative Performance of the Service Providers for the quarter ending September 2008 and December 2008 is available at Annex M.

5.6 The Performance of the CMSPs with respect to the new parameter of %age of Cells having more than 3% call (TCH) drop, service area wise is available at Annex N.

Quality of Service Performance of Internet Service Providers for quarter ending 31st December 2008: -

5.7 Annex O indicates the Quality of Service achieved by the ISPs during the quarter.

The observations on QoS Benchmarks are as follows:

5.8 **<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) have not provided the data.

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

All the ISPs have met the TRAI benchmark of 30 sec.

5.10 **<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.

5.11 **<u>ISP Node Unavailability</u>:**

ISP Nodes unavailability should not exceed 30 minutes in a month. All the ISPs have met the TRAI benchmark. M/s.BSNL, M/s. MTNL Delhi, M/s MTNL Mumbai, M/s Reliance Comm.Infrastructure Ltd, M/s You Telecom India Pvt. Ltd, M/s. HFCL Infotel Ltd and M/s Tata Teleservices (MH) have not provided data.

5.12 **<u>Grade of Service :</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 You Telecom India Pvt. Ltd has informed that M/s BSNL has not provided data and M/s.Tata Communications has also informed that the information was not provided by BSO.

5.13 **<u>Mean Time to Restore (MTTR)</u>:**

As per clause 1.9 schedule “C” of ISP license, ISPs are required to rectify 90% of faults due to subscriber complaint within 24 hours and 99% within three days. All the Operators have met this benchmark. M/s Tata Teleservices has reported that 92.25% of the subscribers complaint are repaired within 24 hours.

Quality of Service Performance of Internet Service Providers providing broadband service for quarter ending 31st December 2008

5.14 Broadband Regulations came into force with effect from 1st January of 2007. Total number of the Broadband Service providers was 72 at the end of last quarter September 2008. Total number of subscriber base of all the Broadband service providers is 5524604 in quarter ending December 2008.

5.15 Twelve new Service Providers are added in this quarter. Out of 84 Broadband Service providers only 15 Service Providers are having subscriber base more than 10,000 subscribers and these 15 Service providers share the 98.64% of total subscriber base in this quarter. The total number of Broadband Subscribers of these 15 Service Providers have increased from 4846810 to 5449665 by adding 6,02,855 (12.43%) subscribers in the quarter ending December, 2008. This report covers performance of 15 broadband Service Providers vis-à-vis the QoS benchmarks prescribed by TRAI.

5.16 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 December 2008, the information on QoS performance is attached to this report as Annex P.

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

Table 21: Status of Non-Compliance of QoS benchmarks for Internet Service Providers providing Broadband Service.

Sl. No.	Parameters	Benchmarks	Name of Service Provider not Meeting the Benchmark
1	**Service Provisioning/ Activation Time**	100% in =< 15 working days	**BSNL:-** AP(98.10%), Assam, (99.60%), Bihar(99.00%), Chhattisgarh (99.90%), HP(99.50%), J&K(85.00%), Jharkhand (98.90%) ,KTK (82.90%), Kolkata (98.70%), MH (97.80%), NE-I(91.30%), Orissa (98.00%), TN(98.10%), UP(W)(91.20%), Uttaranchal (89.90%) WB(96.40%) **MTNL:-** Delhi(92.74%), Mumbai(75.62%). **Tata Communications:-** Central Region (99.00%), East (95.00%), North (96.00%) South2 (95.00%), South 3 (98.00%), South 4 (98.00%) **Hathway:-** Guj(99.14%), MH(91.00%), AP(89.00%) **Reliance :-** All India (99.00%)
2	**Faults Repair /Restoration Time**		
	% of faults repaired by next working day	>90%	**BSNL:-** Chennai(89.30%), Kolkata(59.80%), NE-I(89.70%) **MTNL:-** Delhi (73.57%), Mumbai (54.00%) **Tata Communications :-** East(84.00%) North(86.00%), South1(83.00%), South3(89.00%), West1(87.00%), West2(89.00%) **Hathway :** AP (89.00%) **You Telecom:** All India (84.00%), AP (80.00%), Guj (85.00%), KTK (83.00%), MH (83.00%), TN (76.00%)

	% of faults repaired within 3 working day	=>99%	**BSNL:-** Bihar(98.20%), Kol(88.70%), NEI(89.40%), Orissa(97.00%) **MTNL:-** Delhi (91.91%), Mumbai(84.00%) **Bharti Airtel:-** AP(98.00%), Delhi(98.00%) HR(97.00%), KTK(98.00%) UP (W) (98.00%) **Tata Communications:-** Central Region (98.00%) East (95.00%), North (95.00%), South I (95.00%), South 2(98.00%), South 3(96.00%), South 4(98.00%) West I (96.00%), West 2(97.00%) **You Telecom India Pvt Ltd.:** MH (97.00%)
3	**Billing Performance**		
	%age of bills disputed	<2%	**Tata Communications:-**West 1 (2.18%)
	%age of billing complaints resolved within 4 weeks	100% within 4 weeks	**BSNL:-** AP(98.10%), Chhattisgarh (99.90%), J&K(99.70%), Kolkata(95.30%), MP(99.90%), Orrisa(99.20%), UP(W) (84.40%), Chennai(66.70%)
	%age of cases to whom refund of deposits is made within 60 days of closures	100% within 60 days	**BSNL:-** Jharkhand {66.70%), Kolkata (96.80%), NE I (88.90%) Orissa(99.50%), UP(W)(70.40%) **Bharti Airtel:-** HR (97.00%)
4	**Response Time to the Customer for assistance**		
	%age of calls answered by operator (voice to Voice) within 90 sec	>80%	**BSNL:-** NE I (78.40%)
5	**Bandwidth utilisation/throughput**		
	No. of Intra network links having Bandwidth utilisation >90% during peak hours (TCBH)		**Bharti Airtel:-** Delhi(7 Links), **SpectraNet** : All India (3 Links) **Alliance:** Kolkata (7 Links)
	% of International bandwidth utilization during peak hours (TCBH) Enclose MRTG) **Benchmark<90%**		**Alliance :** Kolkata (84.00%)
	No. of Upstream links for International connectivity having bandwidth utilization >90% during peak hours	<1%	**Bharti Airtel:** Delhi(1 Link) **Alliance** : Kolkata (2 Links)
6	Service availability /uptime (for all users) in %age	>98%	**BSNL:** J&K(96.30%), NE I (92.20%), NE II (93.70%) **Tata Comm. Ltd.):-** North (97.07, South 1(97.52%), South 3(97.50%), West 2 (96.98%) **Reliance:** All India (68.02%)

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CHAPTER SIX

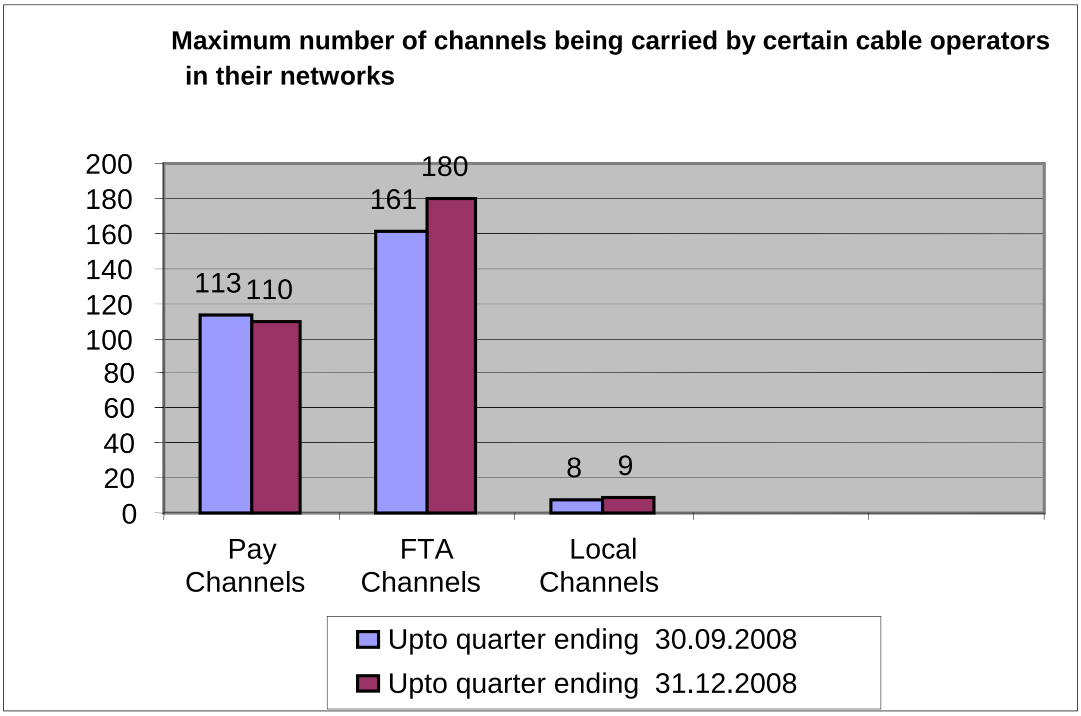
PERFORMANCE OF CABLE TV, DTH AND RADIO BROADCASTING SERVICES

Cable TV Services

6.1 Figure 30 depicts the maximum number of FTA channels, Pay channels and local channels being carried by the MSOs in their network across the country. This 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.

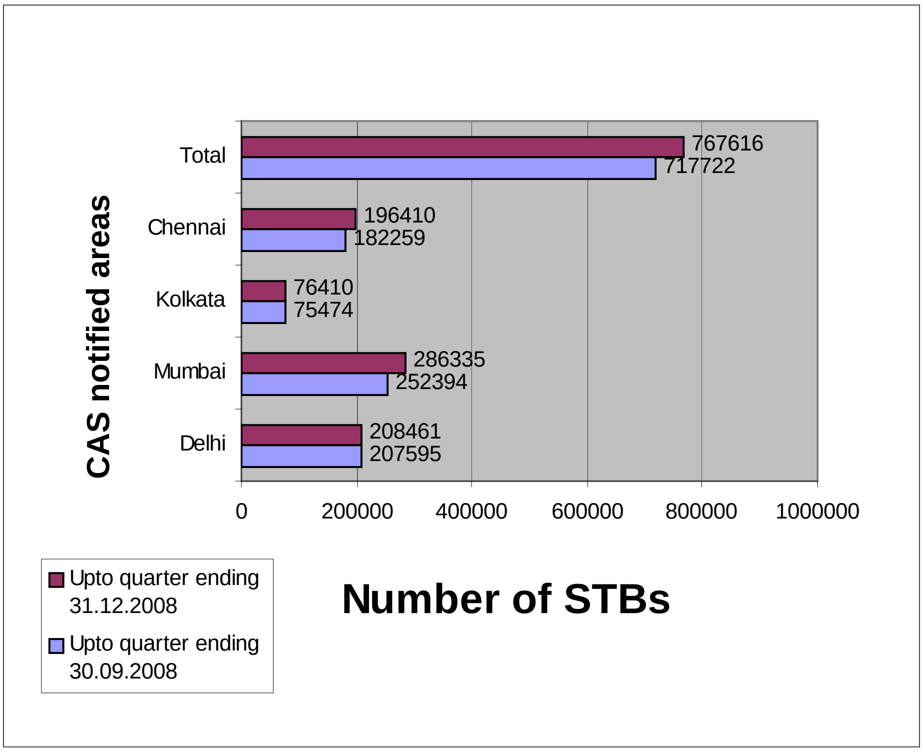
6.2 The maximum number of Free-to-Air (FTA) and Pay Channels reportedly being carried in the cable networks are 180 and 110 respectively in this quarter. However, these numbers relate to different networks and hence cannot be added for arriving at the total number of channels.

Figure 30 : Maximum Number of Channels



6.3 At the end of the quarter ending 30th September 2008, there were 717722 number of set top boxes (STBs) installed in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai. Now, at the quarter ending 31st December 2008, the number has increased to 767616 in the CAS notified areas of Delhi, Mumbai, Kolkata and Chennai. The Figure 31 shows the city-wise status of STBs installed at these four places.

Figure 31: Set Top Boxes (STBs)



Satellite TV Channels

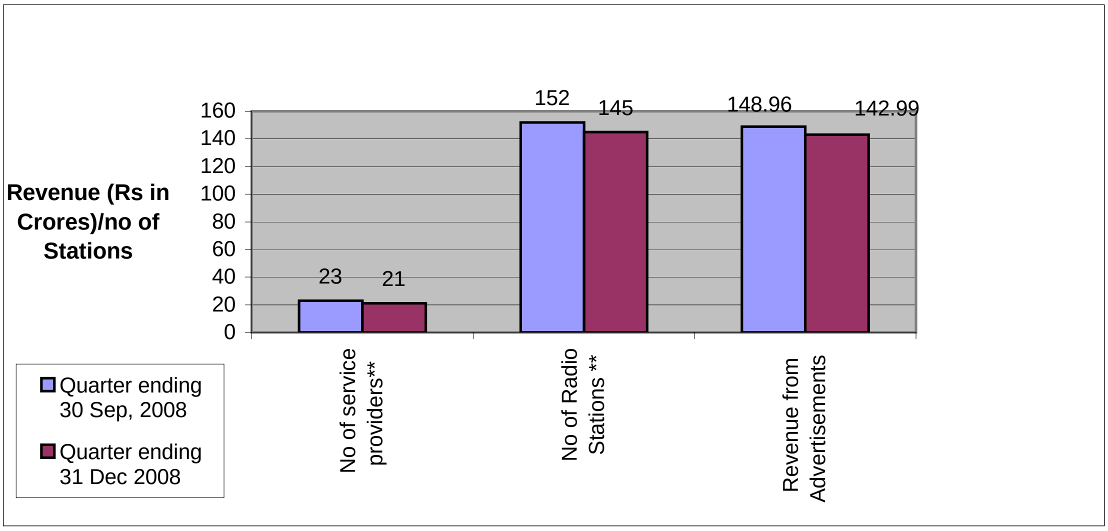
6.4 At the end of 31st December 2008, there are reportedly 129 pay channels in existence. These 129 channels are being broadcasted / distributed by 19 broadcasters or their distributors. The list of broadcasters/distributors of pay channels alongwith the rates of pay channels for Non-CAS areas are given at Table 37.

FM Radio Services

6.5 Apart from All India Radio, there were 236 FM Radio station in operation as on 30th September 2008. During the quarter ending 31st December 2008, 9 more private FM radio station came into operation. Now, at the end of quarter ending 31st December 2008, 245 private FM Radio stations are in operation. The list of these stations is given at Table 38.

6.6 The total Advertisement Revenue up to the quarter ending September' 08 in respect of 23 FM Radio Service Providers and for quarter ending December, 2008 in respect of 21 FM Radio Service Providers who have given their reports is given in the Figure 32. However, the details do not pertain to the same set of service providers.

Figure 32 : Comparative Position of Revenue of FM Radio Station



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

Community Radio

6.7 Upto quarter ending September 2008, there were 57 Community Radio Stations licensees and out of these, 36 were in operation. In the Quarter ending 31st December 2008, 3 more licenses were issued. At the quarter ending 31st December 2008, out of 60 licensees of community radio stations, 41 stations are in operation. In the current quarter five licenses have started their services. The status of applications for community radio station licenses received in Ministry of Information and Broadcasting upto the end of 31st December 2008 is given at Table 39.

DTH Services

6.8 No new DTH license was issued during the quarter. Therefore, at present, apart from free to air DTH service of Doordarshan, there are 6 private DTH licensees.

6.9 Out of 6 DTH licensees, only 5 licensees are offering pay DTH services to the consumers as on 31.12.2008. Total number of reported registered subscribers being served by these 5 DTH operators as on 31.12.2008 is 11.1 million. The list of DTH licensees is given at Table 40.

Teleport Service

6.10 Upto quarter ending 30th September 2008, there were 54 Teleport Service Providers in operation in India. No new license was issued in the quarter ending 31st December 2008. The list of these stations is given at Table 41**.**

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CHAPTER SEVEN

FINANCIAL DETAILS OF TELECOM SERVICE SECTOR

Analysis of GR, AGR, License Fee & Spectrum Charges for the Quarter ending December 2008 (IIIrd Quarter of the financial year 2008-09)

7.1 Figures for the Industry as a whole for Quarter III (Quarter ending December 2008) of F.Y 2008-09 are given below:

Table 22: Figures for the Quarter III of F.Y 2008-09

Item	Amount (Rupees in crore)
Gross Revenue (GR)	39408.16
Adjusted Gross Revenue (AGR)	28940.40
License Fee	2449.36
Spectrum Charges	829.05
Pass through (GR – AGR)	10467.76

7.2 Increase in Gross Revenue and AGR by 5.95% and 5.79% respectively over the previous quarter. Last Quarter, there was a increase in GR and AGR by 5.34% and 1.36% respectively over the previous quarter. GR of all the Service Providers has increased except Reliance and HFCL.

7.3 Service Provider wise GR, AGR, LF & Spectrum Charges for quarter ending December 2008 are available at Table 42.

7.4 In Access services, GR is increased by 4.08%, AGR by 4.07%, License Fee (LF) by 3.44% and Spectrum charges by 9.80%. In NLD, GR is increased by 9.36%, AGR by 10.06% and LF by 10.06%. In ILD, GR is increased by 12.90%, AGR by 43.89% and LF by 43.90%.

7.5 In case of access services, pass through as % of GR of Shyam is the highest – 39.49% (67.59%). It is followed by Tata – 31.39% (32.18%), BPL – 28.05% (28.56%), Reliance – 26.79% (33%), and Aircel – 24.85% (25.34%). Figures in brackets are for previous quarter.

7.6 In NLD, pass thru is highest of Idea – 65.54% (81.82%) followed by Tulip – 61.18% (53.60%), Reliance – 38.62% (40.61%), Vodafone – 35.06% (35.85%) and Tata – 29.91% (29.55%). Figures in brackets are for previous quarter. BSNL, Railtel and HCL have not shown any pass thru.

7.7 In ILD, BSNL, Aircel, BT and AT&T have not shown any pass thru. The SPs which have shown pass thru, pass thru % of GR is highest in case of Vodafone – 72.89% (76.11%) followed by Bharti – 68.06% (69.55%), Tata – 63.37% (69.93%), and Reliance – 48.80% (64.63%). Figures in brackets are for previous quarter.

7.8 As in the previous two quarters, Bharti – Airtel Group again has the highest Gross Revenue of Rs. 10849.63 cr. (Rs. 10007.04 crore) followed by the BSNL – Rs. 9027.18 cr. (Rs. 8800.07 crore). For the first time, Bharti's AGR is also more than the BSNL's – Rs. 7858.49 cr. (Rs.7214.09 cr.) against Rs. 7179.19 cr. (Rs. 7449.58 crore) for BSNL. However, in this quarter, Bharti's figures include the revenue of ISP services also (GR – Rs. 328.25 cr., AGR – Rs. 36.54 cr. and LF – Rs. 2.19 cr.) Pass Thru component of Bharti is Rs. 2991.13 cr. – 27.57% of GR (Rs. 2792.95 cr. – 27.91% of GR) as against BSNL's Rs. 1847.99 cr. – 20.47% of GR (1350.48 cr. – 15.35% of GR). Figures in brackets are for previous quarter.

7.9 The AGR share of Public and Private sector is 28.75% and 71.25% respectively as against 31.23% and 68.77% respectively in the previous quarter.

7.10 The License Fee contribution of Bharti is 27.20% (25.96%) followed by BSNL – 23.33% (25.92%), Vodafone – 15.69% (15.01%) and Reliance – 10.27% (10.03%). Figures in brackets are for previous quarter.

7.11 Overall % of License Fee to AGR is 8.46% as against 8.55% in previous quarter.

7.12 Aircel has added data for spectrum charges for 7 Circles – A.P. Delhi, Mumbai, Karnataka, Kerala, UP(E) and UP(W). Vodafone has added data for Bihar and M.P. Service Areas. Tata has added data for Assam, J&K and North East Service Areas and included Chennai in Tamil Nadu Circle. Spice has now become an associate of Idea Cellular Ltd.

7.13 MTNL has shown an increase in GR and AGR by 3.42% and 4.36% respectively from the previous Quarter. In last quarter, there was a decrease by 5.04% and 4.32% respectively.

7.14 Reliance has shown a decrease in GR by 2.16% and increase in AGR by 7.97%. Last quarter, it showed an increase in GR by 8.97% and a decrease of 5.46% in AGR. In 1st quarter of this financial year, their GR decreased by 3.24% whereas AGR increased by 3.56%.

Table 23: Comparison of Gross Revenue, Adjusted Gross Revenue (AGR), Licence Fee and Spectrum Charges (IInd Quarter & IIIrd Quarter of 2008-09)

(Rs. in Crore)

Gross Revenue		% age	AGR		% age	Licence Fee		% age	Spectrum Charges		% age
IInd Qtr.	IIIrd Qtr.		IInd Qtr.	IIIrd Qtr.		IInd Qtr.	IIIrd Qtr.		IInd Qtr.	IIIrd Qtr.	
37196	39408	5.95	27357	28940	5.79	2339	2449	4.70	755	829	9.86
129082*			101484*			8363*			2665*		

* Figures for last financial year (2007-08)

Table 24 : Service wise Gross Revenue, Adjusted Gross Revenue (AGR), Licence Fee and Spectrum Charges (IIIrd Quarter of 2008-09)

(Rs. in Crore)

Service	IIIrd Qtr of F.Y. 2008-09				% Share			
	GR	AGR	LF	Spectrum Charges	GR	AGR	LF	Spectrum Charges
Access Providers	32161.10	24635.22	2191.05	827.55	81.61	85.12	89.45	99.82
NLD	3843.10	2802.52	168.15	0.00	9.75	9.68	6.87	0.00
ILD	2277.64	1212.66	72.76	0.00	5.78	4.19	2.97	0.00
Others (reported)	1126.32	290.00	17.40	1.50	2.86	1.00	0.71	0.18
Total	**39408.16**	**28940.40**	**2449.36**	**829.05**	100%	100%	100%	100%

Table 25: Category-wise Share in the Access Revenue (GR)

Category	GR	%	GR (Last Quarter)	% (Last Qtr.)	% change
Metro	**6493**	**20.19%**	**6329**	**20.48%**	**2.59**
A	12316	38.29%	12068	39.05%	2.06
B	10409	32.36%	9858	31.90%	5.59
C	2943	9.15%	2644	8.56%	11.31
Total	**32161**	**100%**	**30899**	**100%**	**4.08**

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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