

Telecom Regulatory Authority of India



The Indian Telecom Services Performance Indicators October – December 2005

10th April 2006

TRAI House
A-2/14, Safdarjung Enclave,
Africa Avenue,
New Delhi-110029
Tel: +91-11- 26103466
Fax: +91-11- 26103294
Web: **www.trai.gov.in**

CONTENTS

OBSERVATIONS: -

- (i) Introduction
- (ii) Quarterly results at a glance

Chapter One	:	Performance of Fixed Service
Chapter Two	:	Performance of Mobile Service
Chapter Three	:	Performance of Internet Service
Chapter Four	:	Performance of Other Value Added Services
		(i) PMRTS (ii) VSAT
Chapter Five	:	Quality of Service (QOS) Performance
Chapter Six	:	Performance of Cable TV, DTH & Radio Broadcasting Services

TABLES:

- 1.1 Subscribers Base of Fixed Services
- 1.2 Details of Public Call Offices (PCO)
- 1.3 Details of Village Public Telephones (VPT)
- 2.1 Subscriber Base of Mobile operators
- 2.2 Market Share of Mobile Service Providers
- 2.3 Growth pattern of Mobile Subscribers Base
- 3.1 Subscribers Base of Internet Service
- 4.1 Subscriber Base of Public Mobile Radio Trunking Service (PMRTS)
- 4.2 Subscriber Base of VSAT Service Providers
- 6.1 No. of Cable and Satellite TV Households
- 6.2 Genrewise Cable and Satellite Viewership pattern (in %) in four Metros
- 6.3 Viewing Pattern of FTA Vs Pay Channels (in % terms) (+4 Cable and Satellite viewers) in four Metros
- 6.4 Average Weekly Reach of DD 1 in Millions among Cable, Non Cable & Satellite Viewers of 4+
- 6.5 Colour TV Penetration among C &S Households
- 6.6 Range of number of channels Pay, FTA, Local regularly carried on Network
- 6.7 Information on New Pay Channels and Free to Air (FTA) channels converted into Pay Channels after 26.12.2003
- 6.8 No. of Applications/Letters of Intent/Licenses Issued in respect of DTH Service Provider
- 6.9 Status of Community Radio Stations in the country

ANNEXES:

- 1.1 Details of Fixed Service Licenses issued to private operators
- 2.1 List of Cellular, Fixed & Unified Access Service Providers
- 2.2 Average Revenue Per Use (ARPU)
- 2.3 Usage Pattern for CDMA
- 2.4 Usage Pattern for GSM
- 2.5 Revenue Per Minute (RPM)
- 3.1 Growth Pattern of Internet subscribers
- 3.2 List of Internet Telephony Service Providers
- 4.1 Growth Rate of PMRTS subscribers
- 4.2 Growth Rate of VSAT Subscribers
- 5.1 Quality of Service Performance for Fixed Services
- 5.2 Quality of Service Performance for Mobile (GSM) Services
- 5.3 Quality of Service Performance for ISPs

(i) INTRODUCTION

- 1.1 This report provides an update on the growth trends for the telecom services for the period **October – December 2005**. It presents a broad perspective on the Telecom Services to serve as a reference document for various stakeholders, research agencies and analysts as an update over the previous reports. Due to the Unified Access Service Regime, the details under mobile services combine both GSM & CDMA. The Fixed Service details also include WLL (F) and Village Public Telephones (VPT). This report also covers the performance of Cable TV, DTH & Radio Broadband services. The summary of the growth pattern of Fixed, Mobile and Internet and Broadband services in form of ‘Quarterly results at a Glance’ is given at the beginning of this compilation.
- 1.2 The information for this report has been collected from various telecom operators and service providers. TRAI collects performance-oriented data from various service providers on a quarterly basis to monitor the growth trend in the sector and to decide upon pro-active and suo motto measures to fuel the growth of the telecom services in the country. The data provided in this report is purely provisional and subject to change. TRAI regularly conducts review of its data collection programme to ensure that its processes remains appropriate/relevant in the rapidly growing telecom sector and are consistent with changing regulatory framework.
- 1.3 This quarterly report is available on the TRAI website (www.trai.gov.in) and is updated on quarterly basis. Any suggestions pertaining to this may please be addressed to S. N. Gupta, Pr. Advisor (CN), TRAI; Tel. 26167914, Fax. 26191998 and e-mail: trai09@bol.net.in.

(ii) Quarterly Results at a Glance

Performance Indicators of Telecom Services for QE Dec 2005

A. Growth of Fixed & Mobile Services:-

	QE Dec 2004	QE Mar 2005 (FY 2004-05)	QE Jun 2005	QE Sept 2005	QE Dec 2005	%age growth over Dec 2004 (12 months)	%age growth over Mar 2005 (9 months)	%age growth over Jun 2005 (6 months)	%age growth over Sept 2005 (3 months)
1) Subscriber's Base (in millions)									
i) Fixed Line including WLL(F)	44.87	46.19	46.85	48.00	48.84	8.85	5.74	4.25	1.75
ii) Mobile (GSM + CDMA)	48.01	52.22	57.37	65.07	75.94	58.17	45.43	32.37	16.71
Gross Total	92.88	98.41	104.22	113.07	124.78	34.34	26.80	19.73	10.36
2) Traffic (MOU) (minutes of use/ sub/month) (combined for GSM & CDMA)									
i) Mobile (GSM & CDMA)	327	344	358	367	GSM - 393				
					CDMA - 462				
3) ARPU (Rs./sub/ month) (combined for GSM & CDMA)									
i) Mobile (GSM & CDMA)	399	394	381	374	GSM - 362				
					CDMA - 256				
4) Teledensity									
Population in million (Estimated)	1077	1080	1085	1088	1092				
i) Fixed including WLL(F)	4.17	4.28	4.32	4.41	4.47	7.35	4.58	3.58	1.38
ii) Mobile (GSM + CDMA)	4.46	4.84	5.29	5.98	6.95	56.00	43.83	31.52	16.28
Gross Total	8.62	9.11	9.61	10.39	11.43	32.50	25.40	18.96	9.95

B. Growth of Internet & Broadband Services:-

	QE Dec 2004	QE Mar 2005 (FY 2004-05)	QE Jun 2005	QE Sept 2005	QE Dec 2005	%age growth over Dec 2004 (12 months)	%age growth over Mar 2005 (9 months)	%age growth over Jun 2005 (6 months)	%age growth over Sept 2005 (3 months)
1) Subscriber's Base (in million)									
i) Internet	5.45	5.55	5.89	6.13	6.70	22.94	20.72	13.75	9.30
ii) Broadband Connections (>=256 Kbps download speed)	0.047	0.183	0.399	0.612	0.903	1821.28	393.44	126.32	47.55
2) Minutes of Use (MOU/ subs/month)									
	275	305	300	315	189	-31.27	-38.03	-37.00	-40.00
3) ARPU (Dialup Internet) (Rs./subs/month)									
	167	220	200	190	210	25.75	-4.55	5.00	10.53

C. Performance of service providers during the quarter: -

(I) Fixed Line including WLL(F) Subscribers Base(in Million)

1) Basic Service Providers	QE Dec 2004	QE Mar 2005 (FY 2004-05)	QE Jun 2005	QE Sept 2005	QE Dec 2005	%age growth over Dec 2004 (12 months)	%age growth over Mar 2005 (9 months)	%age growth over Jun 2005 (6 months)	%age growth over Sept 2005 (3 months)
BSNL	36.49	37.04	36.80	36.80	36.76	0.73	-0.76	-0.11	-0.11
MTNL	4.08	4.06	3.95	4.05	3.86	-5.35	-5.00	-2.35	-4.77
Tata/ Hughes	2.00	2.58	3.07	3.62	4.04	101.60	56.59	31.60	11.60
Bharti	0.80	0.86	0.93	1.06	1.20	49.13	39.42	28.92	13.11
Reliance	1.18	1.31	1.72	2.09	2.57	117.43	96.18	49.42	22.97
HFCL	0.18	0.19	0.21	0.22	0.24	31.87	26.32	14.29	9.09
Shyam	0.13	0.15	0.17	0.16	0.17	30.77	13.33	0.00	6.25
Total	44.87	46.19	46.85	48.00	48.84	8.84	5.73	4.24	1.74

(II) Mobile Services Subscriber Base (in Million)

Service Providers	QE Dec 2004	QE Mar 2005 (FY 2004-05)	QE Jun 2005	QE Sept 2005	QE Dec 2005	%age growth over Dec 2004 (12 months)	%age growth over Mar 2005 (9 months)	%age growth over Jun 2005 (6 months)	%age growth over Sept 2005 (3 months)
Reliance	10.15	10.45	11.65	12.99	14.68	44.69	40.48	26.01	13.01
Bharti	9.83	10.98	12.26	14.07	16.33	66.19	48.72	33.20	16.06
BSNL	8.90	9.90	10.69	12.38	14.83	66.72	49.81	38.73	19.79
Hutch	7.18	7.79	8.44	9.71	11.41	58.94	46.47	35.19	17.51
Idea	4.70	5.07	5.55	5.94	6.47	37.78	27.61	16.58	8.92
BPL Group	2.47	2.58	2.63	2.81	2.89	17.10	12.02	9.89	2.85
Others	1.65	1.76	1.87	2.09	2.28	38.43	29.55	21.93	9.09
Spice	1.50	1.44	1.47	1.49	1.63	8.88	13.19	10.88	9.40
Tata/ Hughes	0.81	1.09	1.43	2.06	3.68	356.58	237.61	157.34	78.64
MTNL	0.78	1.08	1.29	1.44	1.65	112.63	52.78	27.91	14.58
HFCL	0.05	0.05	0.06	0.06	0.06	22.45	20.00	0.00	0.00
Shyam	0.03	0.03	0.03	0.03	0.03	15.38	0.00	0.00	0.00
Total	48.01	52.22	57.37	65.07	75.94	58.17	45.43	32.37	16.71

Chapter One

PERFORMANCE OF FIXED SERVICES

Subscribers Base nears 49 million

1.1 Subscribers Base: -

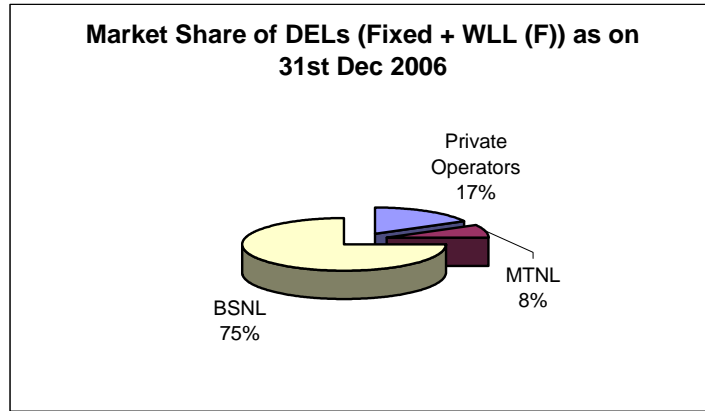
1.1.1 As on 31st December 2005 and the Fixed lines were provided by 5 licensed private operators in addition to incumbents BSNL and MTNL. List of Fixed Service provider's along with their area of operation is given in Table 1:

Table 1

S.No.	Name of the Service Provider	Area of Operation
1	BSNL	All India
2	MTNL	Delhi & Mumbai
3	Bharti Telesonic Ltd	AP, MP, Delhi, Haryana, Tamil Nadu, Chennai, Karnataka, Kerala, Gujarat, Punjab, Maharashtra, Mumbai, UP(E),UP(W) including Uttaranchal, West Bengal and Kolkata
4	Tata Teleservices (Maharashtra) Ltd	Maharashtra, Mumbai
5	Tata Teleservices Ltd	AP, Tamil Nadu, Chennai, Karnataka, Gujarat, Delhi, Bihar, Orissa, Rajasthan, Punjab, Haryana, Himachal Pradesh, Kerala, Madhya Pradesh, U.P. (E), U.P (W) including Uttaranchal, West Bengal and Kolkata
6	HFCL Infotel Ltd	Punjab
7	Shyam Telelink Ltd	Rajasthan
8	Reliance Infocomm.Ltd.	AP, Bihar, Delhi, Gujarat, Haryana, HP, Karnataka, Kerala, MP, Maharashtra, Mumbai Orissa, Punjab, Rajasthan, Tamil Nadu, Chennai, UP (E), UP (W), West Bengal, Kolkata

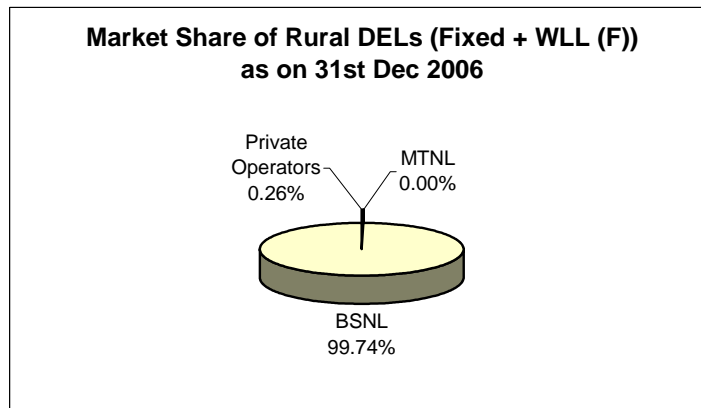
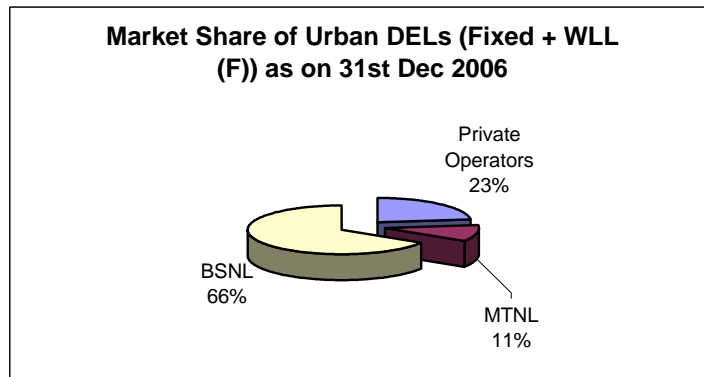
The information in this report is based on the data provided by the Fixed Service Providers. The operator-wise subscriber base is given in Table 1.1.

1.1.2 Market Share of DELs



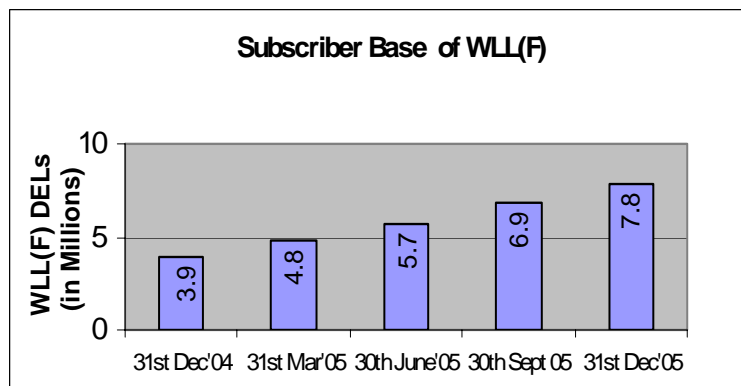
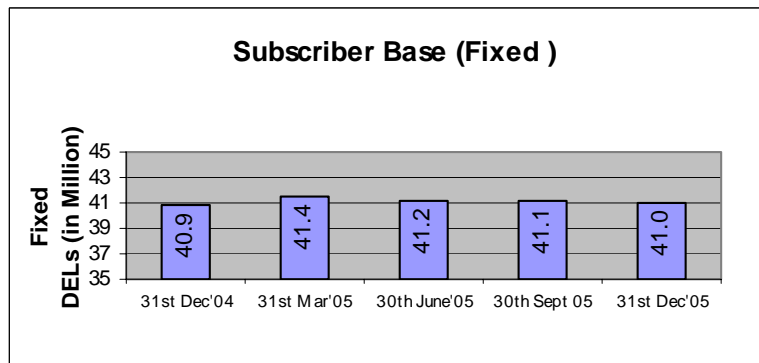
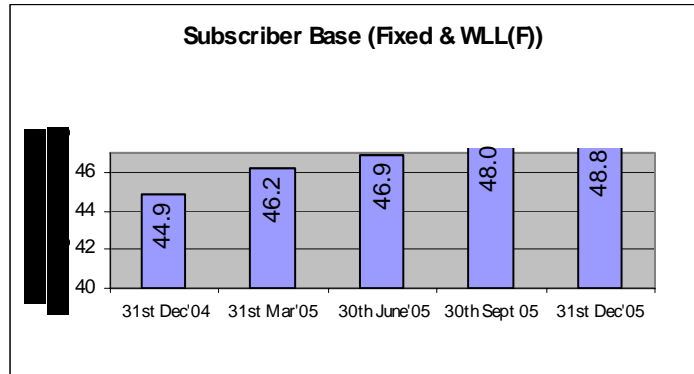
As on 31st December 2005, the total subscriber base of Fixed lines including WLL (F) stood at 48.84 million. The incumbents BSNL and MTNL have 75% and 8% market share respectively in the subscriber base, while all the five private operators have 17% share. In the current quarter the share of private operators have increased by 2% and the share of BSNL has declined by 2% whereas the share of MTNL remains the same.

As on 31st December 2005 total urban DELs are 34.86 million and rural DELs are 13.98 million. The market share of Fixed Service Providers in Urban DELs and Rural DELs is depicted in the charts below:



1.1.3 Subscriber Base of Fixed & WLL(F) for last five quarters

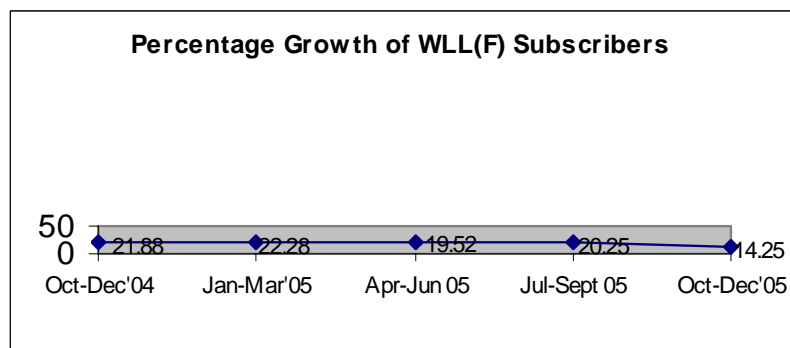
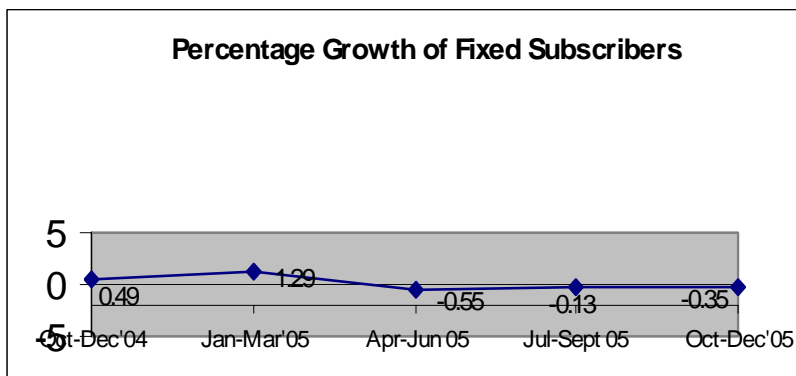
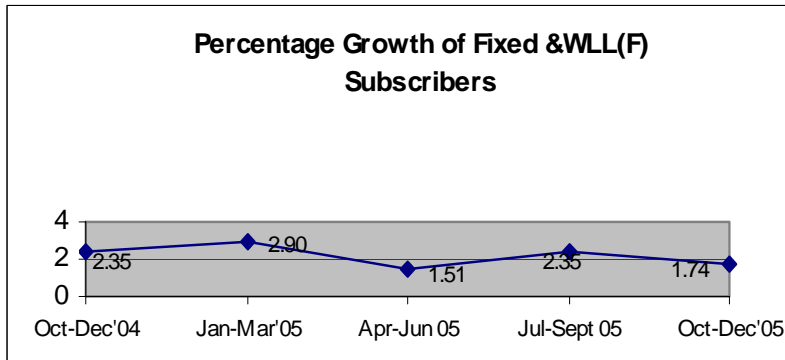
The subscriber base of the Fixed service sector for last five quarters is depicted in the bar chart below:



1.1.4 Growth of DELs

The Fixed Service sector has registered a growth of 8,34,081 lines during the quarter from 1st October 2005 to 31st December 2005. The actual number of DELs has increased from 4,80,01,992 as on 30th September 2005 to 4,88,36,073 as on 31st December 2005. The overall percentage of growth in subscriber base during the Quarter is 1.74%.

Average percentage growth rate of Total, Fixed Wireline and WLL(F) Subscribers

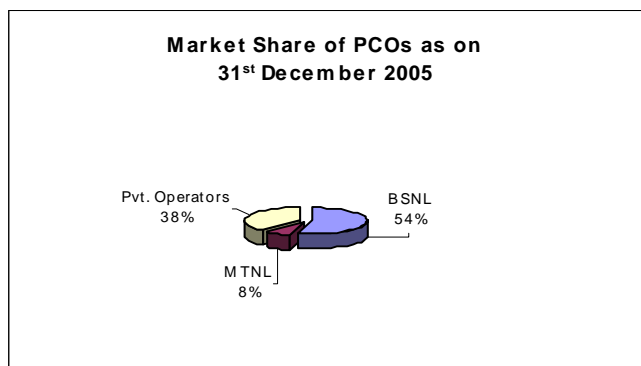


1.2 Other Performance Indicators: -

1.2.1 Public Call Offices:

During the current quarter 82,945 new PCOs have been added. Total number of PCOs in the country as on 31st December 2005 is 37,34,687. The contribution of BSNL is 20,23,673 i.e. 54% of the total PCOs. The contribution of MTNL and other private operators is 2,81,876 (8%) and 14,29,138 (38%) respectively.

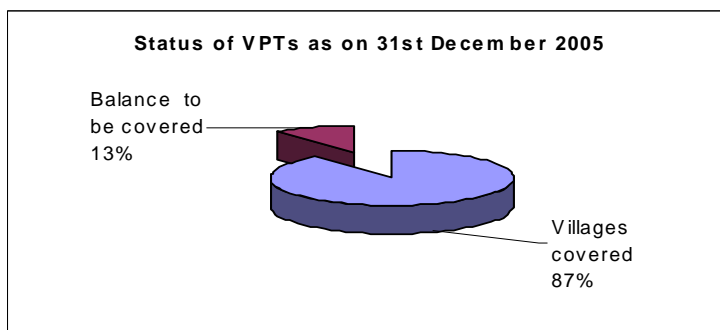
Operator-wise (BSNL/MTNL/Other Private Operators) market share of PCO is depicted in the chart below. Operator-wise details of PCOs is available at Table 1.2.



1.2.2 Village Public Telephones:

There are 6,07,491 villages in India. During the quarter ending 30th Sept 2005 there were 5,35,048 VPTs in the country whereas by the end of this quarter, the total number of VPTs has marginally increased to 5,39,356. Thus 4,308 VPTs have been added during the current quarter. The total number of villages left uncovered, as on 31st December 2005 are 68,135. BSNL has added 4,329 VPTs during the quarter. Among the five private operators there was a decrease of 6 VPTs in TATA (MH) and 15 VPTs in HFCL respectively, during this quarter.

Circle-wise and Operator-wise details of village public telephones as on 31st December 2005 and achievement during the quarter are available at Table 1.3.



Chapter Two

PERFORMANCE OF MOBILE SERVICES

Subscriber Base crosses 75 million mark

PART A

2.0 Details of service providers: - The list of all the mobile service providers along with their licensed service area is following: -

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 (23)		All India except Raj, NE
3	Reliance Telecom/Infocomm/Reliable Internet Services Ltd	All India (23)		All India except NE & AS
		Reliance Infocomm (21)	Assam & NE	
		Reliance Telecom. (7) MP, WB, HP, Bihar, Orissa, Assam & NE	Delhi, Mumbai, Chennai, Kolkata, Maharashtra, Gujarat, AP, Karnataka, Tamil Nadu, Kerala, PB, Haryana, UP (W), UP (E), Rajasthan & J&K	
		Reliable Internet Services Ltd (1) Kolkata	All India except Kolkata	
4	Tata Teleservices	All India (20) except (Assam, NE & J&K)	Assam, NE & J&K	All India except (Assam, NE & J&K)
5	Hutch	Delhi, Mumbai, Chennai, Kolkata, Guj, AP, KTK, Punjab, HR, UP-W, UP-E, Raj & WB (13)	Maharashtra, Kerala, Tamil Nadu, MP, HP, BR, OR, AS, NE & J&K	UP-W, WB
6	Aircel	Chennai, TN WB, HP, BR, OR, AS, NE & J&K (9)	Delhi, Mumbai, Kolkata, Maharashtra, Gujrat, AP, Karnataka, Kerala, Punjab, Haryana, UP (W), UP (E), Rajasthan. & MP (14)	WB, HP, BR, OR, AS, NE & J&K
7	IDEA	Delhi, MH, Guj, AP, KR, HR, UP-W, MP (8)	Mumbai, Chennai, Kolkata, Karnataka, Tamil Nadu, Punjab, UP-E, Rajasthan, WB, HP, Bihar, Orissa, Assam, NE & J&K	--
8	BPL	Mumbai, MH, TN, KR (4)	All India except (Mumbai, Maharashtra, Tamil Nadu, Kerala)	--
9	Spice Communications	KTK, Punjab (2)	All India except (Karnataka, Punjab)	KTK, Punjab
10	HFCL	Punjab (1)	All India except Punjab	Punjab
11	Shyam Telelink	Rajasthan (1)	All India except Rajasthan	Rajasthan
12	Escorts Communications	UP-E, Raj, HP (3)	All India except (UP-E, Rajasthan, HP)	---

Note: 1. Reliance Telecom for all his circles has applied for Unified Licence.

Note: 2 Reliance Infocomm in J&K, Escorts Communications & Aircel (Dishnet Wireless Ltd) in HP, Bihar & J&K is yet to start his services.

Circle-wise details of Cellular, Fixed & Unified Access Service providers at the end of the quarter are given at Annex 2.1. All the service areas of the country have mobile operators ranging from 3 to 7.

2.1 **Growth of Subscribers Base: -**

2.1.1 Subscribers Base

The Mobile (GSM and CDMA) Industry has reached the 75.94 million subscribers mark (GSM 58.49 million & CDMA 17.45 million) for the quarter ending 31.12.2005.

2.1.2 Addition in Subscribers Base

The subscriber's base stood at 75.94 million as against 65.07 million for the quarter ending 30.9.2005. Around 10.87 million subscribers were added in this quarter.

2.1.3 Growth Rate

The growth rate for this quarter is 16.72% (15.03% in GSM and 22.79% in CDMA) as against 13.42% (13.16% in GSM and 14.37% in CDMA) for the quarter ending September 2005. In this quarter M/s BSNL has crossed the subscribers base of M/s Reliance and has captured the second position. M/s Bharti remains the largest mobile operator followed by M/s BSNL and M/s Reliance.

2.1.4 Company wise Market Share:

- a) The Subscriber Base of different Mobile operators is given in Table 2.1. The top five Mobile operators on the basis of market share are as under: -

Mobile Group	Subscribers as on December, 05 (in Millions)	Market Share (in %age)	Technology Used
Bharti	16.33	21.50	GSM
BSNL	14.83	19.53	GSM & CDMA
Reliance	14.68	19.33	GSM & CDMA
Hutchison	11.41	15.02	GSM
IDEA	6.47	8.52	GSM

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

- b) Distribution of Subscriber Base and market share of Mobile service as on December 2005 among Metros, Circles A to C is given in Table 2.3.

2.1.5 Change in Market Structure

The name M/s Hutchison Max Telecom Limited has been changed to M/s Hutchison Essar Limited. M/s Spice Communications in Karnataka has migrated to

UASL License from CMTS License. M/s Bharti, M/s Reliance and BSNL/MTNL have license to offer mobile services in all 23 service area. The largest operator, M/s Bharti is offering services in all the 23 service areas. M/s Reliance is presently offering services in all service areas except J&K circle. BSNL is also offering services in 21 circles. M/s Tata Teleservices is offering services in all its licensed 20 service areas.¹ Para 2.0 shows the list of the mobile service providers along with their respective licensed service area.

During this quarter, M/s Dishnet wireless Services started its services in Orissa and West Bengal Circles. In this quarter, the subscribers' base of M/s Bharti in Maharashtra and M/s BSNL in Karnataka, Tamil Nadu & Kerala circle had crossed one Million. In all 22 (19 GSM and 3 CDMA) service providers have crossed one million subscribers mark. The service areas are Delhi (3), Mumbai (4), Maharashtra (3), Gujarat (1), Andhra Pradesh (2), Karnataka (2), Tamil Nadu (2), Kerala (1), Punjab (2) and UP (E) (2).

¹ M/s Tata does not have license to offer access services in J&K, Assam & North East.

PART B

2.2 Mobile [GSM & CDMA] Service trends:

2.2.1 Summary findings for GSM Operators:

- Share of prepaid subscribers in total subscriber base is up from 76% at the end of Sept 2005 to 78% at the end of December 2005.
- All India ARPU declined by 3.2%, from Rs.374 per month to Rs.362 per month.
- The Postpaid ARPU decreased from Rs. 646 to Rs.621 whereas prepaid ARPU increased from Rs. 284 to Rs.286.
- Average MOU per subscriber per month for the quarter is 393, showing an increase of around 7% from 368 per month during the quarter ending Sept-05.
- Outgoing MOUs increased by 9% while the incoming MOUs increased by 5% between the two quarters.
- The ratio of incoming – outgoing traffic continues to be 60:40 in the quarter.
- The all India blended RPM (Revenue per Minute) for the quarter has declined by 8.9%, from Rs. 1.01 in Sept- 05 to Rs. 0.92 in Dec-05.
- 81% of the Local (Intra-circle) outgoing traffic is accounted by Mobile terminating traffic.
- Proportion of On- network traffic is also growing. The percentage of the on network (Mobile) traffic terminated within the service area increased from 45% to 53%.
- Trend indicates that the proportion of local calls (MOU) to total outgoing MOU is increasing and that of long distance is falling.

2.2.2 Summary findings for CDMA Operators:

- Share of prepaid subscribers in total subscriber base is 82% at the end of December 2005, as compared to 80% at the end of September 2005.
- All India ARPU for the quarter ending December 2005 is Rs. 256 showing an increase of 4.92% from Rs.244 (Sep-2005).
- All India postpaid ARPU at Rs. 511 per month is about 2.5 times than that of all India prepaid ARPU of Rs. 207 per month.
- Average MOU per subscriber per month for the quarter is 462, showing a decline of 1.6% from 470 per month during the quarter ending Sep-2005.
- The ratio of incoming – outgoing traffic is estimated to be 56:44 in the quarter ending December 2005 as against 58:42 in September quarter.
- The All India blended RPM (Revenue per Minute) for the quarter has increase by 5.76% from Re. 0.52 in Sep-2005 to Re. 0.55 in Dec-05.
- Mobile-to-Mobile Local (Intra-circle) traffic accounts for 87% of the Local (Intra-circle) traffic.
- On an average 60% of the total Intra-circle traffic terminates within own network (Mobile).

2.2.3 ARPU

2.2.3.1 For GSM:

This implies a growth rate of 10.62%. Growth in average subscriber base in the corresponding period has been 15.62%.

- There has been a decrease in all India blended ARPU per month by about 3.2% from Rs. 381 in the quarter ending Sept-05 to Rs.362 in Dec-05 (Annex 2.2 Table (c)).
- Monthly ARPU in postpaid segment has declined from Rs. 646 in Sept-05 to Rs.621. On the other hand, prepaid segment has shown a marginal increase in ARPU per month from Rs. 284 in Sept-05 to Rs.286.
- Gap between postpaid and prepaid ARPU is narrowing. Postpaid ARPU was 2.27 times that of prepaid ARPU in the quarter ending Sept-05, and this has narrowed down to 2.17 times in this quarter.
- There has been a decline of about 9.04% in ARPU since last year i.e. between Dec-04 to Dec-05.

2.2.3.2 For CDMA:

- The All India blended ARPU has increased by about 5% from Rs. 244 in the quarter ending Sep-05 to Rs. 256 in the quarter ending Dec-05.
- Monthly ARPU in postpaid segment has increased from Rs. 440 in the quarter ending Sep-05 to Rs. 511 in Dec-05.
- ARPU in, prepaid segment has also increased from Rs. 194 in Sep-05 to Rs. 207 in Dec-05.
- There is a huge difference between postpaid and prepaid ARPU. Postpaid ARPU has been 2.47 times that of prepaid ARPU.
- Blended Revenue from Usage (Call Revenue adjusted for interconnect Payments) accounts for 56% showing a decline of 3% from 59% (Sep-2005).

2.2.4 Usage Pattern

2.2.4.1 For GSM

- MOU per subscriber increased from 368 in quarter ending Sept-05, to 393 in Dec-05, thereby showing an increase of about 6.79%. Outgoing MOUs alone increased by 9.15% (from 142 to 155) and incoming MOUs by 4.87% (226 to 237) (Annex 2.4 Table (b)).
- In Postpaid, total MOUs increased by 5.27% from 645 in Sept-05. to 679 in Dec-05. Increase in prepaid service for the same period has been 10.43% (from 278 307).
- The incoming-outgoing minutes ratio is 61:39. For postpaid, ratio of incoming-outgoing minutes is 55:45 and for prepaid segment, it is 65:35.
- The outgoing MOU per subscriber has been highest in Circle C at 197 per month and highest incoming MOU per subscriber has been in Metros at 256 per month. Lowest per subscriber usage for both outgoing and incoming has been in Circle B, for outgoing (144 per month) and incoming (212 per month).

2.2.4.2 For CDMA

- Average MOU per subscriber per month for the quarter is 462, showing a decline of 1.6% from 470 per month during the quarter ending Sep-2005.
- On an average a CDMA subscriber makes 205 minutes of outgoing calls, sends 15 SMS and receives incoming calls for 257 minutes in a month.
- The ratio of incoming – outgoing traffic is 56:44.
- Circle C at 417 per month has recorded Lowest per subscriber usage for both outgoing and incoming calls followed by Circle A at 428 per month.
- Circle A at 178 per month has recorded the Lowest per subscriber usage for Outgoing calls followed by Metro at 216 per month (Annex 2.3 Table (a)).
- Circle C at 167 per month has recorded the Lowest per subscriber usage for Incoming calls followed by Circle A at 251 per month (Annex 2.3 Table (a)).
- The number of SMS has been highest in Circle B & Metro (16 per subscriber month), and lowest in Circle C (13).

2.2.5 Revenue Per Minute (RPM)

2.2.5.1 For GSM

- The all India blended RPM (Revenue per Minute) for the quarter has declined by 8.9%, from Rs. 1.01 in Sept- 05 to Rs. 0.92 in Dec-05 (Annex 2.5 Table (b)).
- The RPMs for postpaid and prepaid are almost at the same level.

2.2.5.2 For CDMA

- The all India blended RPM for the quarter is Re. 0.55. For postpaid alone, RPM is Re. 0.77 as against Re. 0.49 for prepaid service (Annex 2.5 Table (a)).
- The all India blended RPM (Revenue per Minute) for the quarter has increased by 5.76% from Re. 0.52 in Sep-2005 to Re. 0.55 in Dec-05 (Annex 2.5 Table (a)).

2.2.6 Tariff Trends

2.2.6.1 For GSM

- Lowest Tariffs available in the market (for local outgoing usage) as of December-05 for GSM services

Effective charge represents the actual payout by a user with a defined traffic pattern. Total outgoing traffic have been distributed between fixed and mobile with further break up into on-net and off-net, based on the information furnished by the GSM Service providers in the quarterly report.

- Postpaid Service

Effective charge has been calculated for a monthly local usage of 250 outgoing minutes. Around 570 postpaid tariff plans in the country were

analyzed to arrive at the lowest effective charge per minute. The lowest available effective charge per minute is Rs. 1.20

○ Prepaid Service

Majority of the prepaid subscribers are using the Rs.300 or lower recharge coupon and hence the tariffs applicable for these recharge coupons (or its minor variants) have been taken as the representative tariffs for the pre-paid service. On an analysis of about 160 prepaid tariff plans, it is found that the lowest effective charge per minute is Rs. 1.27.

2.2.6.2 For CDMA

➤ Lowest Tariffs available in the market (for local outgoing usage) as of Dec-05 for Basic & CDMA services

Effective charge represents the actual payout by a user with a defined traffic pattern. Total outgoing traffic have been distributed between fixed and mobile with further break up into on-net and off-net, based on the information furnished by the CDMA Mobile in the quarterly report.

○ Fixed (Wireline + Wireless)

Effective charge has been calculated for a monthly local usage of 250 outgoing minutes. All the Postpaid tariff plans in the country were analyzed to arrive at the lowest effective charge per minute. The lowest available effective charge per minute is Re. 0.71

○ CDMA Mobile Postpaid

Effective charge has been calculated for a monthly local usage of 250 outgoing minutes. All the Postpaid tariff plans in the country were analyzed to arrive at the lowest effective charge per minute. The lowest available effective charge per minute is Rs. 1.31

Chapter Three

PERFORMANCE OF INTERNET SERVICES

Subscribers base crosses 6.7 million – Meets the Broadband policy target

3.1 Service Providers & Subscribers Base: -

For the quarter ending December 2005, 163 Internet Service Providers were operational. Bharat Sanchar Nigam Ltd (BSNL) has retained its top position and reported a subscriber base of 25.97 Lakhs against 22.62 Lakhs during the last quarter. Mahanagar Telephone Nigam Limited (MTNL) has retained second position with a subscriber's base of 13.14 Lakhs against 12.07 Lakhs subscribers during the last quarter. M/s Sify Limited is on the third position with a subscriber base of 8.77 lakhs as against 8.56 lakhs. M/s Videsh Sanchar Nigam Limited is at fourth position with subscriber base of 4.67 lakhs. Reliance Communications Infrastructure Ltd. reported a subscriber base of 3.40 Lakhs and remained at fifth place during the quarter ending 31st December, 2005. (Ref Table 3.1).

At the end of quarter ending 31st December,2005 number of Internet subscribers stood at 67.03 lakhs as compared to 61.25 lakhs during the preceding quarter registering an increase of 9.44% during the quarter. The annual growth rate w.r.t 31st December,2004 is 23%. In terms of subscribers the number was 67.03 lakhs at the end of 31st December,2005 as against 54.50 lakhs reported at the end of 31st December,2004.

3.2 Internet Telephony: -

The Internet Telephony was permitted to Internet service providers w.e.f 1st April'02. DOT has given permission to 121 ISPs to offer Internet Telephony services as on March 2005, and as per the report submitted to TRAI, 51 ISPs have started Internet Telephony services, the list of which is enclosed at Annex 3.2. Total minutes of the use for Internet Telephony during the quarter were 58.66 million, as compared to 47.31 million for the last quarter, thus indicates a growth of 23% during the quarter.

3.3 Market Share: -

The growth trend indicates a considerable growth in market share of PSU owned ISPs. During the quarter PSU owned ISPs have captured 58% market share.

The market share of top 5 ISPs is as under:

ISP	Share in %
Bharat Sanchar Nigam Ltd.	38.74
Mahanagar Telephone Nigam Ltd.	19.60
Sify Ltd.	13.09
Videsh Sanchar Nigam Ltd.	6.97
Reliance Communications Infrastructure Ltd.	5.08

Among PSU owned ISPs; M/s BSNL has reported a subscriber's base of 25.97 Lakhs during the quarter ending 31st December, 2005 as against 22.62 Lakhs during the previous quarter registering an increase of 14.80%. M/s MTNL has reported a subscriber base of 13.14 Lakhs against the subscriber base of 12.07 Lakhs reported during the previous quarter, registering an increase of 8.80 %.

Chart 1- Subscriber Base

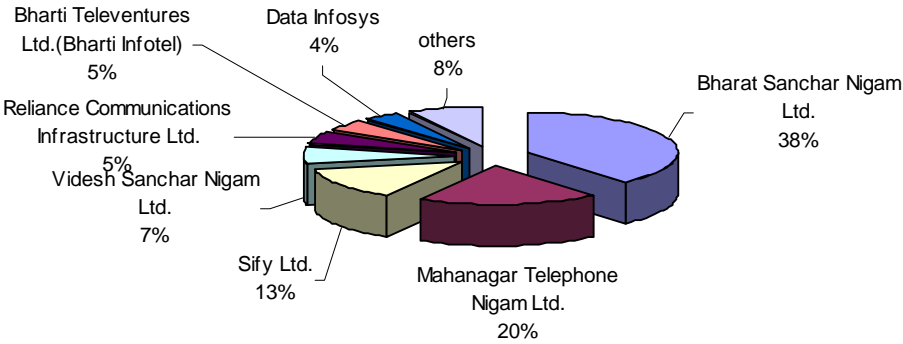
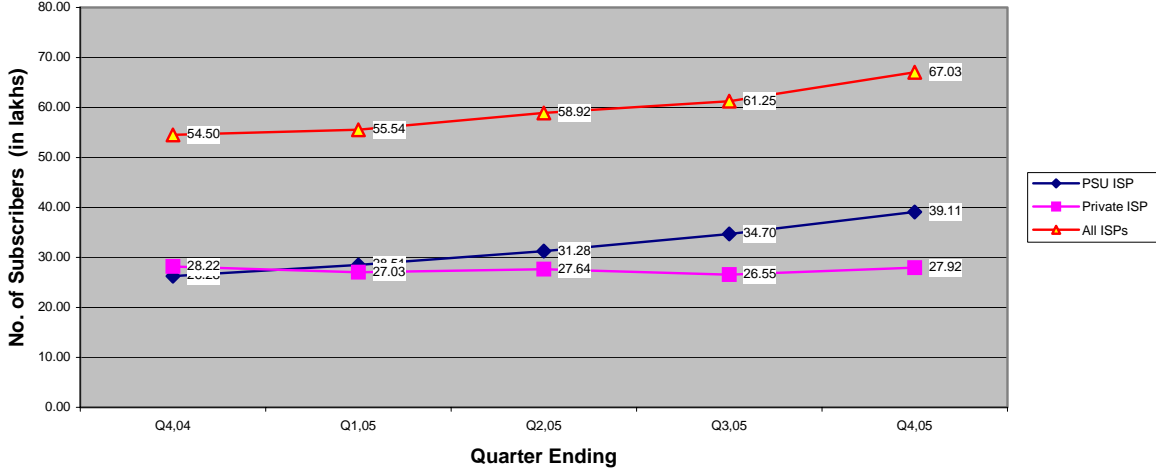


Chart 4 - Growth Trends



3.4 Leased Lines Connectivity: -

The numbers of Leased Line Internet connections remained at 14,364 during the quarter ending December,2005.

3.5 Broadband Connectivity (>=256 Kbps): -

The number of Broadband subscribers as reported by ISPs was 9.03 Lakhs at the end 31st December,2005 as compared to 6.10 Lakhs of 30th September, 2005, thus registering a growth of 48% over the previous quarter

3.6 Minutes Of Use (MOU) per subscriber for Dialup Internet access: -

As reported by 34 ISPs for the dialup Internet the average minutes of use per subscriber/ month was approximately 189 minutes.

3.7 Average Revenue Per User (ARPU) for ISPs: -

A total of approx. Rs 424 crores revenue has been reported during the quarter. The average revenue per user (ARPU) per month for dialup Internet usage was of the order of Rs 210.

3.8 International connectivity: -

The bandwidth owned by various IGSP for their ISP operations and Internet Leased lines is reported to be 10.45 GB for downlinking and 10.36 GB for uplinking.

Chapter Four

PERFORMANCE OF OTHER VALUE ADDED SERVICES

VSAT services accelerate growth

4.1 Public Mobile Radio Trunked Service (PMRTS): -

12 service providers of Public Mobile Radio Trunked Services have submitted their reports in this quarter.

4.1.1 Performance during the Quarter Ending 31st December 2005:

- The subscriber base of PMRTS increased from 27867 in Sept, 2005 to 28025 in Dec., 2005 registering a growth rate of 0.57%.
- Delhi, Mumbai, Bangalore and Chennai together account for 71.93% of market share of the total subscribers. Delhi leads the tally with the market share of 8901 subscribers followed by Bangalore, Mumbai and Chennai with the market share of 4659, 3829 and 2769 subscribers respectively.
- M/s. Procall Private Limited leads the tally of subscribers with a subscriber base of 8288 followed by The Arvind Mills Ltd. and M/s. QuickCalls India Pvt. Ltd. with a subscriber base of 7013 and 4109 respectively. M/s Aryadoot Transport Pvt. Ltd. has increased their subscriber base with the highest growth rate of 8.94% followed by M/s. Arya Offshore Services Pvt. Ltd. with 5.63% growth rate in this quarter. Five Service Providers viz. M/s. German Express Shipping Agency (India) Pvt. Ltd., M/s. United Liner Agencies of India (Pvt.) Ltd., M/s. Procall Private Ltd., M/s. The Arvind Mills Ltd., M/s. Smartalk Private Ltd. have registered a negative growth of -2.15%, -3.65%, -0.46%, -0.96% and -2.85% respectively in this quarter.

The subscriber base of service providers of PMRTS is given in Table 4.1.

4.2 VSAT services: -

VSAT services are being provided by 9 VSAT service providers.

4.2.1 Performance during the quarter ending 31st December 2005:

- VSAT services are being provided by 9 VSAT service providers.
- M/s Telstra Vishesh has not submitted their report for the last quarter.
- In the present quarter, there was an addition of 3494 new subscribers. The total number of subscribers increased from 43083 in September, 2005 to 46577 in December, 2005, registering a growth of 8.11% as against the growth rate of 6.23% in quarter ended September, 2005. HCL Comnet remained the market leader with 16192 VSAT subscribers followed by Hughes Escorts Communications Ltd. (HECL) with 14267, Bharti BT with 6929 and Comsat Max with 4661 VSAT subscribers respectively.
- M/s HCL Comnet added the maximum number of new connections 1310 with a percentage growth rate of 8.80.

The number of subscribers of each service providers along with the Market Share in terms of Percentage of Subscribers as on 31st December 2005 is given in Table 4.2.

Chapter Five

QUALITY OF SERVICE (QOS) PERFORMANCE

5.1 Quality of Service performance of Basic Service Operators for the quarter ending 31st December 2005: -

Based on Quality of Service Parameters reported by all the Basic Service Operators for the quarter ending December 2005, the information on QoS performance is attached to this report as Annex 5.1.

From perusal of the report (Annex 5.1) following points emerge: -

(1) **Provision of telephone within 7 days for exchange areas declared “On Demand” (100% in <7days).**

60 out of 71 Licensees have not met the QoS benchmark for this parameter. The performance of M/s BSNL (Bihar, Assam, Jharkhand, J & K, NE-I & WB), Reliance (Delhi, MH, Punjab, KTK, Chennai, Mumbai, UP-E, UP-W & WB) and Bharti Tele- ventures (MH, Kolkatta & UP-W) is (28.33%, 39.86%, 36.96%, 16.38%, 40.00% & 33.28%), (22.65%, 15.31%, 48.24%, 12.44%, 48.64%, 40.93%, 37.26% 43.48% & 0.00%) and (18%, 9.01%, 34.27% & 9.95%) respectively, which is way below the TRAI stipulated benchmark of 100%.

(2) **Fault incidences per month per 100 telephones (should be less than 5 Faults per 100 phones per month)**

Bharat Sanchar Nigam Limited (except Tamilnadu & Kolkatta) and MTNL (Mumbai & Delhi) have not met the stipulated QoS benchmark for this parameter.

Among the Private Operators only Bharti Tele-ventures (AP, DL, GJ, MH, PB, KR, Kolkata, UP(W)), Reliance Infocom (GJ, PB, Raj, TN, UP-E & WB) have not met the TRAI stipulated benchmark of <5 for this parameter.

(3) **Percentage of faults repaired by next working day (should be >90%)**

M/s Bharat Sanchar Nigam Limited has not submitted their performance for this parameter whereas M/s MTNL have not met this benchmark in their Delhi circle and data not reported for Mumbai circle.

Among the private operators M/s Tata Tele-services (AP, TN, KTK, Mumbai), Reliance Infocom (AP, BR, Delhi, GJ, MH, HR, KTK, KR, Kolkata, WB) and Bharti Tele-ventures Limited (AP,GJ, MH, PB, Mumbai) have not met the benchmark for this parameter whereas, M/s Reliance (KR, AP, Delhi, GJ, KTK), Bharti Tele-ventures (AP, MH) and Tata (TN) have submitted their performance in this quarter as (3.23%, 2.87%, 2.92%, 2.80%, 3.47%), (1.72%, 16.00%) and 0.00% respectively, which is the worst performance against the TRAI stipulated QoS benchmark of >90%

(4) **Mean Time to repair (MTTR) (should be <8hrs.)**

M/s BSNL, in only 8 out of 26 circles have met the benchmark whereas MTNL (Delhi & Mumbai) have not met this benchmark. The performance of M/s Tata Tele-services (TN), Bharti Tele-ventures (MH), BSNL (Chennai, NE-I) and MTNL (Mumbai) is (27.00 hrs), (612.60 hrs.), (20.00 hrs., 31.00 hrs.) and (25.10 hrs.) respectively, which is way below the TRAI benchmark of <8 hrs.

(5) Call Completion Rate in local network (should be >55%)

M/s BSNL in 05 out of 26 circles has not met the OoS benchmark and MTNL Delhi and Mumbai have not achieved the benchmark.

Among the private Operators only Tata (AP, Delhi, KTK, Chennai), and Bharti Tele-ventures (AP, KR, Kolkatta, UP-W, PB, HR) have not achieved the desired QoS benchmark of TRAI. Reliance Infocom has not reported the data for this parameter.

(6) Metering and Billing credibility (Not more than 0.1% of bills should be disputed over a billing cycle)

Only 01 (NE-II) out of 26 service areas of BSNL and M/s MTNL, Mumbai have not met the benchmark for this parameter.

Among the Private Operators M/s Tata Teleservices (GJ, MH, Mumbai), Bharti (AP, GJ, PB, KTK, KR, Kolkatta, Mumbai, UP-W), M/s Reliance (AP, MH, Raj, KTK, KR, Mumbai, Orissa UP-E, West Bengal) and Shyam Tele-link (Raj) have not achieved the TRAI's QoS benchmark of <0.1%.

(7) Customer Care: Promptness in attending 95% of customers requests (Benchmarks for Shifts, Closures and providing additional facilities are <3 days, <24 hours and <24hours respectively)

(i) Shifts:-

M/s BSNL have met the QoS benchmark for this parameter in Only 12 out of 26 circles. Whereas, MTNL (Delhi, Mumbai) have failed to meet the requirement on "Customer care – Shifts".

Among the private operators only Shyam Telelink (Rajasthan), Tata (Chennai, Delhi & Gujarat), Reliance (KR, UP-W, AP) and Bharti (Kolkatta & PB) have met the QOS benchmark on Customer Care (Shifts).

(ii) Closures:-

Only 7 out of 26 service areas of M/s BSNL have met the TRAI QoS Benchmarks whereas M/s MTNL (Delhi and Mumbai) have also failed to meet the benchmarks.

Among the private operators only Tata (Chennai, AP, GJ, MH), Bharti (Kolkata, UP-E, MP), Reliance Infocom (Orissa), HFCL, Punjab and Shyam Telelink, Rajasthan have met the stipulated benchmark.

5.2 Quality of Service performance of Cellular Mobile Service Providers for quarter ending 31st December 2005: -

- a) This report covers performance of 87 GSM Cellular Mobile operators and 41 CDMA service operators vis-à-vis the QoS benchmarks prescribed by TRAI.
- b) M/s Dishnet Wireless Limited (West Bengal, Assam, North East and Orissa) and M/s HFCL Punjab have submitted their first performance monitoring reports in this quarter. Thus, the number of service providers who have reported their QOS performance has increased from 123 to 128 in this quarter.

The summary of status of the service providers who have met the benchmarks in this quarter as compared to previous quarter is given in the following table:

Sr. No.	Parameters	Bench- marks	No. of operators Meeting the benchmarks			
			Quarter ending Sept, 2005		Quarter ending Dec, 2005	
			Out of 123 (Nos.)	Out of 123 (%)	Out of 128 (Nos.)	Out of 128 (%)
1	Accumulated down time of community isolation	<24 hrs	99	80.49%	123	96.09%
2	Call Set-up Rate (within licensee's own network)	>95%	119	96.75%	127	99.22%
3	Service Access Delay	Between 9 to 20 Sec	112	91.06%	128	100.00 %
4	Blocked Call Rate (i) SDDCH Paging Channel Congestion	<1%	105	85.36%	117	91.41%
	(II) TCH Congestion	<2%	99	80.49%	109	85.16%
5	Call Drop Rate	<3.0%	121	98.37%	126	98.44%
6	% of connection with good voice quality	>95%	121	98.37%	126	98.44%
7	Response Time to the customer for assistance (i) age of calls answered (electronically) within 20 seconds = 80%	80%	113	91.87%	125	97.66%
	%age of calls answered (electronically) within 40 seconds = 95%	95%	104	84.55%	125	97.66%
	%age of calls answered by operator (voice to voice); within 60 seconds = 80%	80%	99	80.49%	99	77.34%
	(ii) %age of calls answered by operator (voice to voice); within 90 seconds = 95%	95%	88	71.54%	89	69.53%
8	Complaints per 100 bills issued	<0.1%	93	75.61%	107	83.59%
9	% of complaints resolved with 4 weeks	100%	118	95.93%	128	100.00 %
10	Period of all refunds/payment due to customers from the date of resolution of complaints as in (9) above	<4 weeks	119	96.75%	126	98.44%

5.2.1 The analysis of PMR of 128 Cellular licensees in 23 service areas is as under: -

(A) Network Performance

- i. **Accumulated down time of community isolation:-** M/s BSNL (MH, OR), Bharti (AP), Reliance-GSM (AS) and BPL (TN) are not meeting the benchmark of <24 hrs. for this parameter. However, the performance of M/s Bharti Tele-ventures, in respect of this

parameter is 177.67 hrs which is way beyond the benchmark of <24 hrs.

- ii. **Call Set-up Success Rate** – Only M/s Bharat Sanchar Nigam Limited, Orissa has not met the TRAI stipulated benchmark of >95%.
- iii. **Service access delay** – All the operators have met this benchmark of 9 to 20 seconds.
- iv. **Blocked Call Rate**

1. SDCCH/Paging Channel Congestion – Only 11 service providers namely, M/s BSNL (MH, KTK, Raj, BR, OR), M/s Bharti Televentures (Raj), Idea Cellular (MP), Reliance GSM (WB, BR, NE) and Aircel (Chennai) have not met the benchmark of <1%. The performance of M/s BSNL (RJ) is 7.90% which is much beyond the benchmark of <1%.

2. TCH Congestion – M/s BSNL (AP, KTK, RAJ, BR, OR, AS), Idea Cellular-MP, Reliance Telecom (MP, WB, BR, OR, NE) and Aircel Cellular Limited, Chennai reported their performance for this parameter as (4.90%, 5.80%, 7.90%, 4.50%, 8.20%, 4.64%), (12.28%), (8.90%, 8.26%, 9.80%, 6.83%, 8.45%) and 7.63% respectively, which is much above the benchmark of <2.00%.

iv) Call Drop Rate - All the service providers have met the benchmark of this parameter except BSNL (BR – 3.20%) and Reliance GSM (NE – 4.60%) against the benchmark of <3%.

v) %age of good voice quality- All the Service Operators have met the benchmark for this parameter except BSNL (BR and OR).

(B) Customer Help Line - Response time to the customer for assistance

- (i) **%age of call answered (electronically) within 20 sec:-** The performance of M/s Idea Cellular (HR), Tata CDMA (Mumbai) and BPL (Mumbai) is 40.00%, 0.00% and 77.87% respectively. M/s Tata, Mumbai with performance of 0.00% is the worst one.
- (ii) **%age of call answered (electronically) within 40 sec:-** M/s Tata-CDMA (Mumbai) is having the worst performance as **0.00%** for this parameter against the TRAI benchmark of 95%.
- (iii) **%age of call answered by operator (voice to voice) within 60 sec:-** The performance of M/s Reliance-CDMA (AP, KTK, UP-W, UP-E, MP, WB, BR, Orissa, Delhi, Kolkata) and BSNL (KTK) is (36.21%, 54.91%, 35.27%, 35.27%, 56.17%, 49.76, 49.76%, 56.17%, 56.11%, 49.76%) and (53.00%) respectively for this parameter which is way below the TRAI benchmark of 80%.
- (iv) **%age of call answered by operator (voice to voice) within 90 sec:-** The performance of Reliance CDMA (AP, UP-W, UP-E, WB, BR, Kolkata), Idea Cellular (Delhi) and BSNL (KTK) is (50.37%, 48.45%, 48.45%, 69.19%, 69.19%, 69.19%), (15.00%) and (58.00%%) respectively, which is way below the TRAI benchmark of 95%.

(C) Billing Complaints

- (i) **No. of Complaints per 100 bills issued** the performance of M/s Tata Teleservices CDMA, Mumbai is 1.04% against the TRAI benchmark <0.1%.

5.2.2 Details of Quality of service:

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: -

5.3.1 The annex 5.3 indicates the Quality of Service achieved by Top 20 ISPs during the quarter: It is observed that most of the ISPs are able to meet the benchmarks, barring one or two cases.

5.3.2 The observations on QOS Benchmarks are as follows:

5.3.2.1 Service Activation Time :

All the ISPs have met the benchmark of 6 hrs. ISPs Hathway Cable & Datacom Pvt. Ltd., Tata Teleservices Maharashtra Ltd., HFCL Infotel Ltd., Fascel, Hughes, Broadband Pacenet (I) Pvt. Ltd. and Webel ISP have not provided the data.

5.3.2.2 Time to Access :

ISPs are required to achieve the benchmark 30 sec. The ISPs Hathway Cable & Datacom Pvt. Ltd., Fascel, Hughes, Broadband Pacenet (I) Pvt. Ltd. and Webel ISP have not provided the data, rest others have met this benchmarks.

5.3.2.3 Probability of Accessing the ISP Node :

ISPs are required to maintain the parameter of 80% for the first attempt, 90% for the second attempt and 99% for the third attempt. All the ISPs are able to meet this benchmark.

Hathway Cable & Datacom Pvt. Ltd., Fascel Ltd., Hughes, Broadband Pacenet (I) Pvt. Ltd. and Webel ISP have not provided us the data.

5.3.2.4 ISP Node Unavailability :

ISP Nodes unavailability should not exceed 30 minutes in a month. Except Asianet Sattelite Communication Ltd. and WWW communications Ltd., other ISPs are able to achieve this benchmark.

MTNL, Hathway Cable & Datacom Pvt. Ltd., Tata Teleservices (Maharashtra) Ltd., Fascel Ltd., Hughes, Broadband Pacenet (I) Pvt. Ltd. and Webel have not provided us the data.

5.3.2.5 Grade of Service :

ISPs are required to maintain the Grade of Service on the link connecting PSTN node to the ISP node as 1 in 100. Two ISPs (VSNL and BG Broadband India Pvt. Ltd.) have informed that the information regarding the above mentioned benchmark can not be provided as the BSO has not given the information to them.

Reliance Communications Infrastructure, Hathway Cable & Datacom Pvt. Ltd., Fascel, WWW Communications, Hughes, Broadband Pacenet (I) Pvt. Ltd. and Webel ISP have not provided us the data.

5.3.2.6 Mean Time to Restore (MTTR) :

As per clause 1.9 Schedule 'C' of ISP license, ISPs are required to rectify 90% of faults resulting due to subscriber complaints within 24 hours and 99% within three days.

All the ISPs have been rectifying the fault within stipulated period of three days. Hathway Cable & Datacom Pvt. Ltd. and Fascel have not provided us the data

Chapter Six

PERFORMANCE OF CABLE TV, DTH AND RADIO BROADCASTING SERVICES

6.1 This is the report in respect of Broadcasting and Cable Service and this contains:

- a) Total No of Cable and Satellite TV Households as per the estimates in the Report of Media Partners Asia Limited on Asia Pacific Pay TV and Broadband Markets 2006 (Media Partners Research Estimates) for year ending Dec 2005 is 64.85 Million. The figures as per two surveys, one done by the National Readership Survey and Indian Readership Survey are also given alongside in Table 6.1. **(Table 6.1)**
- b) Relative genre wise % share of viewership Vs Advertisement Revenue during 2004 and 2005. **(Table 6.2)**
- c) Relative % share of viewing pattern of channels (Pay Vs FTA Vs local) in four Metros during 2004 and 2005. **(Table 6.3)**
- d) Range of number of channels carried regularly carried across cable Network(s) and cities where digital services are offered. The data is in respect of the quarters ending Sept 2005 and Dec 2005. **(Table 6.4 (a) &(b))**
- e) Details of new pay channels / FTA Channels converted to Pay after 26.12.2003 on the basis reports received from broadcasters / distributors of TV Channels under clause 4 of the Tariff Order of 1.10.2004. **(Table 6.5)**
- f) Details of no of applications, received, no of Licenses issues for DTH services. **(Table 6.6)**
- g) Information on total Advertisement Revenue of FM Radio Stations who have given their reports.
- h) Status of Community Radio Stations in the country as on 30.11.2005 **(Table 6.7)**

6.2 This above information has been given in 8 tables appended to this report. Brief Highlights in respect of data contained in these tables are indicated below:

A. Cable Television

- a) Table 6.2 indicates that the relative % share in total advertisement revenue in respect of General Entertainment Channel and Regional Language channel have not moved in the same direction as the relative % f share in total viewership of these two genre of channels between the years of 2004 and 2005. In the case of genre of General Entertainment Channel there is a small % increase in relative viewer ship share from 33% from 2004 to 33.6% in 2005 but its relative share in % advertisement revenue has gone down from 47% in 2004 to 39.5%. In the case of genre of Regional Language Channel though there is a fall

(around 4.5 %) in relative viewer ship % share in 2005 over 2004 the relative Advertisement Revenue share % has increased (around 4.4%) in 2005 over 2004.

- b) It may be seen from Table 6.3 indicate that the % share of FTA channels in Delhi and Kolkata have gone up in the quarter ending Dec 05 over the previous quarter ending Sept 05. There is no perceptible change in relative % ages of share between pay, FTA and local channels Chennai and Mumbai in the two quarters.
- c) As per the Media Partner's Asia Limited report on Asia Pacific Pay TV and Broadband Markets 2006 (Media Partners Research Estimates) the total Cable Industry Revenue is estimated at US\$3530 Million (INR 15490 crores approx)) for the Year ending December' 2005. The estimated figure for 2004 was at US \$ 2675 Million. (Table 6.1)
- d) Table 6.4 (a) & (b) gives an indication of maximum and minimum of range of number of FTA, Pay and Local channels, in Analogue and/or Digital mode, regularly carried during the quarter ending Dec 05 on cable TV networks which have been reported. Figures for the previous quarter as available (without any break up of analogue/digital) have also been given in the table. The gap between the ranges of maximum and minimum in a particular quarter may be due to different sizes of reporting networks operating in different areas and in different economic clusters and variations between the quarters may be partly due to different networks reporting and the number of agencies reporting for the quarters. The maximum and minimum figures may not be of the same network or area reporting as the range indicated is based on overall figures reported across different networks operating in different areas of different service providers.
- e) Table 6.5 giving information on names of New Pay Channels and Free to Air (FTA) channels converted into Pay Channels after 26.12.2003 indicates that there have been 30 new pay channels/ converted FTA Channels to pay that have been launched since 26.12.2003. This is based on information reported by broadcasters in terms of clause of 4 of the TRAI's Tariff Order of 1.10.2004 on broadcasting and cable services.

B. DTH Services

6.3 It can be seen from table 6.6 that besides the existing DTH player there could be four more players who may come into the market in the future. The entry of more number of DTH operators may signify effective competition to cable TV platform.

C. Radio

6.4 The total Advertisement Revenue up to the quarter ending with Sept 05 and Dec 05 of 7 FM Radio Service Providers who have given their reports are summarized below:

No of Service providers Reporting	No of Radio Stations Reported for	Revenue from Advertisement /Air Time Sale (Rs in crores)			
		For Qtr Ending Sept 05	For Qtr Ending Dec 05	For year ending Mar 05	For year ending Mar 04
7	18	56.28	111.33	133.29	101.09

6.5 Table 6.7 gives the status on Community Radio Stations in the country.
