Chapter - II

MAIN MOBILE SERVICE PROVIDERS

A large population and a rise in consumers' income and spending owing to economic growth have helped make India the fastest-growing telecom market in the world. The mobile service first operator in India is the state-owned incumbent BSNL. Subsequently, after the telecommunication policies were revised to allow private operators, companies such as Vodafone, Bharti Airtel, Tata Indicom, Reliance, Idea Cellular and Aircel have entered the space in India.

Mobile service providers have their own plans, policies, packages and corresponding rates. Although they are offered by various companies, they have only one common purpose. And that is to provide people with telecommunication services so that they could maintain good conversations either for personal purposes or for business reasons.

It is consumers' task to think about as to which company can provide him the best service. Consumers demand a cell phone service provider who offers the widest selection of features and excellent customer service and avoids hidden charges. Following are the main mobile service providers in India:
BSNL, formed in October 2000, is World's 7th largest Telecommunications Company with comprehensive range of telecom services in India like Wireline, CDMA mobile, GSM Mobile, Internet, Broadband, Carrier service, MPLS-VPN, VSAT, VoIP services, IN Services etc. Within a span of five years it has become one of the largest public sector unit in India.

The Company has installed Quality Telecom Network in the country and now focusing on improving it, expanding the network, introducing new telecom services with ICT applications in villages and winning customers' confidence. Today, it has about 46 million line basic telephone capacity, 8 million WLL capacity, 52 million GSM capacity, more than 38302 fixed exchanges, 18000 BTS, 287 Satellite Stations, 480196 Rkm of OOF C Cable, 50430 Rkm of Microwave Network connecting 602 districts, 7330 cities/ towns and 5.5 lakh villages.

BSNL is the only service provider, making focused efforts and planned initiatives to bridge the Rural-Urban Digital Divide ICT Sector. The Company offers wide ranging & most transparent tariff schemes designed to suit every customer. BSNL cellular service, CellOne, has more than 55,140,282 2G cellular customers and 88,493 3G customers as on 30-11-2009 garnering
24 per cent of all mobile users as its subscribers. That means that almost every fourth mobile user in the country has a BSNL connection. In basic services, BSNL is miles ahead of its rivals, with 35.1 million Basic Phone subscribers.

The Company has more than 2.5 million WLL subscribers and 2.5 million Internet customers who access Internet through various modes, viz. Dial-up, Leased Line, DIAS, Account Less Internet (CLI). BSNL has been adjudged as the NUMBER ONE ISP in the country. At present, there are 0.6 million DataOne broadband customers. The company has a world class ISO 9000 certified Telecom Training Institute.

The present turnover of BSNL is more than Rs. 351,820 million (US $ 8 billion) with net profit to the tune of Rs. 99,390 million (US $ 2.26 billion) for the last financial year. The infrastructure asset on telephone alone is worth about Rs. 630,000 million (US $ 14.37 billion). The turnover, nationwide, coverage, reach, comprehensive range of telecom services and the desire to excel has made BSNL the No. 1 Telecom Company of India.

The Registered office of the Company is located in Bharat Sanchar Bhavan, Harish Chandra Mathur Lane, Janpath, New Delhi- 110 001. Its Corporate office is also situated there.
Board of Directors

Corporate structure of BSNL Board consists of CMD & five full time Directors, Human Resource Development (HRD), Planning & New Services, Operations, Finance and Commercial & Marketing, who manage the entire gamut of BSNL operations. There are five other Directors in the full Board of BSNL.

Sh. Kuldeep Goyal has taken over as Chairman & Managing Director of BSNL on August 1, 2007. He joined the Indian Telecommunication Service of Govt. of India in 1972. He is an Engineering Graduate from IIT, Roorkee.

Vision

BSNL, with the following mission, aspires to become the largest telecom service provider in Asia:

(i) To provide world class state-of-art technology telecom services to its customers on demand at competitive prices.
(ii) To provide world class telecom infrastructure in its area of operation and to contribute to the growth of the country's economy.

Objectives

The BSNL is moving ahead with the following objectives:

(i) To be the Lead Telecom Service Provider in India with global presence.
(ii) To provide quality and reliable fixed telecom service to its customers and thereby increase their confidence.

(iii) To provide mobile telephone service of high quality and become no. 1 GSM operator in its area of operation.

(iv) To provide point of interconnection to other service providers as per their requirement promptly.

(v) To facilitate R & D activities in the country.

BSNL plans to contribute towards:

(i) National Plan Target of 500 million subscriber base for India by 2010.

(ii) Broadband customers base of 20 million in India by 2010 as per broadband Policy 2004.

(iii) Providing telephone connections in villages as per government policy.

(iv) Implementation of Triple play as a regular commercial proposition.
Bharti Airtel Limited, established in 1995, a group of Bharti Enterprises, is Asia’s integrated telecom services provider with operations in 18 countries across Asia and Africa with an aggregate of over 180 million customers. It has been voted as India’s most innovative company in a survey conducted by the Wall Street Journal.

Bharti Airtel is structured into three strategic business units - Mobile services, Telemedia services and Enterprise services. The mobile business offers services in India and Sri Lanka. The Telemedia business provides broadband and telephone services in 95 cities. DTH services has recently forayed into the IPTV services. The Enterprise business provides end-to-end telecom to corporate customers and national and international long distance services to carriers. All these services are provided under the Airtel brand. Airtel's high-speed optic fibre network currently spans over 90,205 kms covering all the major cities in the country. The company has two international landing stations in Chennai that connect two submarine cable systems- i2i to Singapore and SEA-ME-WE-4 to Europe.

On March 12, 2009, Bharti Airtel Limited, Asia’s leading telecommunications services provider, announced key apex level organisational changes aimed at laying the foundation for the company's next phase of growth. The new structure has been designed to manage future growth opportunities, exploit scale &
building cost synergies, while continuing to desire advantage from on- the- ground focus on sales and enhanced levels of customer service. Having led the transformation at the Telemedia business, Atul Bindal has taken over as President - Mobile Services.

Airtel is one of India’s leading providers of telecommunication services with a nationwide presence in all the 23 licensed jurisdictions (also known as Telecom Circles). Bharti Airtel Limited has been ranked among the six best performing technology companies in the world by Business Week. It is structured into four strategic business units – Mobile, Telemedia, Enterprise and Digital TV. The Mobile business offers services in 18 countries across Asia and Africa. The Telemedia business provides broadband, IPTV, and telephone services in 89 Indian cities. The Enterprise business provides end-to-end telecom solutions to corporate customers and national and international long distance services to carriers. The Digital TV business provides DTH service across India. All these services are provided under the Airtel brand.

Bharti Infratel and Indus Towers are the two top providers of passive infrastructure services in India. Company shares are listed on the Bombay Stock Exchange (BSE), and the National Stock Exchange of India Limited (NSE).

**Latest Factsheet**

<table>
<thead>
<tr>
<th>Name</th>
<th>Bharti Airtel Limited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman and Group CEO</td>
<td>Sunil Bharti</td>
</tr>
</tbody>
</table>
Business Description -

Provides GSM mobile services in all the 22 telecom circles in India and was the first private operator to have an all India presence. It provides telemedia services (fixed line and broadband services through DSL) in 89 cities of India.

Established - July 07, 1995 as a Public Limited Company.

Proportionate Revenue -

Rs. 396,150 million (year ended March 31, 2010- Audited)
Rs. 369,615 million (year ended March 31, 2009- Audited)

Customer Base -

1,27,619,314 GSM mobile and 3,066,858 Telemedia Customers (status as on March 31, 2010).

Registered office - Bharti Airtel Limited (A Bharti Enterprise),
Aravali Crescent, 1, Nelson Madela Road,
Vasant Kunj, Phase-II, New Delhi- 110 070.

Bharti Airtel launched world’s first Windows-based online Desktop on Airtel broadband- powered by Microsoft and Nivio. This initiative will pave the way for easy and affordable access to computing and broadband in India.

Vision –

By 2010, Airtel will be the most admired brand in India:
- Loved by more customers.
- Targeted by top talent.
(3) **IDEA**

IDEA Cellular is a publicly listed company, having listed on the Bombay Stock Exchange (BSE) and the National Stock Exchange (NSE) in March 2007. The Company is a leading GSM mobile service operator with pan India licenses with a customer base of over 67 million subscribers under brand Idea. It has the distinction of offering the most customer friendly and competitive Pre-paid offerings and having won "Best Willing Care Award".

IDEA Cellular is part of the Aditya Birla Group, India’s first truly multinational corporation. The group operates in 25 countries and is anchored by over 1,30,000 employees belonging to 25 nationalities. The established service areas are Delhi, Andhra Pradesh, Gujarat, Maharashtra, Haryana, Kerala, Madhya Pradesh and Uttar Pradesh (West).

**New Service Areas:**

The new service areas are Uttar Pradesh (East), Rajasthan, Himachal Pradesh, Bihar, Mumbai, Karnataka, Punjab, Orissa, Tamil Nadu, J&K, Assam and North East.

Licenses for Uttar Pradesh (East), Rajasthan and Himachal Pradesh were required through the acquisition of Escorts Telecommunications Limited (Escotel).
Services in Karnataka and Punjab were launched through the acquisition of Spice Communications.

IDEA launched its services in Mumbai and Bihar in 2008. The Mumbai launch was the largest Metro City launch in India.

The chronology of key events of the Company from incorporation is set out below:

**2009**
- Subscriber base on December 31, 2009: 57,611,872.
  Idea becomes a pan India operator- fastest growing telecom market.

**2008**
- Subscriber base on December 31, 2008: 40,016,153.
- IDEA acquired 9 licenses for Punjab, Karnataka, Tamil Nadu & Chennai, West Bangal, Orissa, Kolkata, Assam, North East, and Jammu & Kashmir.
- Acquired Spice Communication with the operating circles of Punjab and Karnataka.
- Launched services in Mumbai metro in the largest single metro city launch ever.
- Launched services in Bihar.

**2007**
- Won an award for the "CARE" service in the 'Best Billing or Customer Care Solution' at the GSM Association Awards in Barcelona, Spain.
- Initial Public Offering aggregating to Rs.28,187 million and listing of Equity Shares on the Bombay Stock Exchange and the National Stock Exchange.
- Merger of seven subsidiaries with Idea Cellular Limited.

2006
- Became part of the Aditya Birla Group subsequent to the TATA Group.
- Acquired Escorts Telecommunications Limited (subsequently renamed as Idea Telecommunications Limited).

2004
- Acquired Escotel Mobile Communications Limited (subsequently renamed as Idea Mobile Communications Limited).
- Reached the four million subscriber mark.
- First operator in India to commercially launch EDGE services 2005.

2002
- Changed name to Idea Cellular Limited and launched "IDEA" brand name.
- Commenced commercial operations in Delhi circle.

The company is run under the supervision of Board of Directors headed by Mr. Kumar Mangalam Birla as Chairman.
Vodafone Group Plc. is the World’s leading mobile telecommunications company, with a significant presence in Europe, the Middle East Africa, Asia, Pacific and the United States through the Company's subsidiary undertakings, joint ventures, associated undertakings and investments.

The Group's subsidiaries operate under the brand name 'Vodafone'. During the last two financial years, the Group has also entered into arrangements with network operators in countries where the Group does not hold an equity stake. Under the terms of these Partner Network Agreements, the Group and its partner networks co-operate in the development and marketing of global services under dual brand logos.

As on 31 March, 2010, based on the registered customers of mobile telecommunications ventures in which it had ownership interests at that date, the Group had 341 million customers.

The Company's ordinary shares are listed on the London Stock Exchange, and its American Depository Shares (ADSs) are listed on the New York Stock Exchange. The Company had a total market capitalization of approximately £71.2 billion on 12 November, 2009.

Vodafone was formed in 1984 as a subsidiary of Racal Electronics Plc. Then known as Racal Telecom Limited, approximately 20% of the company's capital was offered to the public in October 1988. It was fully demerged from Racal Electronics Plc. and became an independent company in September 1991, at which time it changed its name to Vodafone Group Plc.

Following its merger with AirTouch Communication Inc., the company changed its name to Vodafone AirTouch Plc. on 29 June, 1999 and following approval by the shareholders in General Meeting reverted to its former name Vodafone Group Plc. on 28 July, 2000.

Key milestone in the development of Vodafone can be found in the following sections, organized by year -

**2009**
- Completion of merger between Vodafone Australia Limited and Hutchinson 3G Australia Pty. Limited.

**2008**
- Vodafone acquires 70% stake in Ghana Telecom for $900 million (July).
- Vodafone launches Afghanistan's Roshan. Afghanistan is added to the Vodafone footprint (February).

2007
- A consortium led by Vodafone Group is awarded the second mobile phone license in Qatar (December).
- Vodafone announces completion of the acquisition of Hutch Essar from Hutchison Telecommunications International Limited (May).
- Vodafone reaches 200 million customers (January).

2006
- Sale of 25% stake in Switzerland's Swisscom (December).
- Sale of 25% stake in Belgium's Proximus (August).
- The number of Vodafone live customers with 3G reached 10 million in March 2006.
  3G broadband through HSDPA launched offering faster than 3G speeds.

Sir John Bond became Chairman of Vodafone Group Plc. on 25 July, 2006 having previously served as a Non-Executive Director.

Chief Executive Officers in subsidiary operations worldwide:
Albania, Australia, Czech Republic, Egypt, Germany, Ghana, Greece, Hungary, India, Ireland, Italy, Malta, Netherlands, New Zealand, Portugal, Qatar, Romania, Spain, Turkey, and UK.
Tata, a rapidly growing business group based in India, is known for its significant international operations. Revenues in 2007-08 are estimated at $70.8 billion, of which 61 per cent is from business outside India. The Group employs over 350,000 people worldwide. The Tata name has been respected in India for 140 years for its adherence to strong values and business ethics.

The Group's 27 publicly listed enterprises have a combined capitalisation of some $60 billion, among the highest Indian business houses, and a shareholder base of 3.2 million. The major companies in the Group include Tata Steel, Tata Motors, Tata Consultancy Services (TCS), Tata Power, Tata Chemicals, Tata Tea, Indian Hotels and Tata Communications.

Tata Communications, a member of the $70.8 billion Tata Group, is a leading global provider of a new world of communications. The emerging markets communications leaders leverages its advanced solutions capabilities and domain expertise across its global and pan-India network to deliver managed solutions to multinational and Indian enterprises, service providers and Indian consumers.

Tata Communications’ range of services include transmission, IP, converged voice, mobility, managed network
connectivity, hosting and storage, managed security, managed collaboration and business transformation for global enterprises and service providers, as well as Internet, retail broadband and content services for Indian consumers. The Tata Global Network encompasses one of the most advanced and largest submarine cable networks, a Tier-1 IP network, with connectivity to more than 200 countries across 300 Pops, and more than 1 million square feet of data center and co-location facilities.

Servicing customers from its offices in over 80 cities in 40 countries, Tata Communications is the number one global international wholesale voice operator and number one provider of international long distance, enterprise data and Internet services in India.

Tata Communications Limited along with its global subsidiaries, (Tata Communications), is listed on Bombay Stock Exchange and the National Stock Exchange of India, while its ADRs are listed on the New York Stock Exchange (NYSE:TCL).

TATA TELESERVICES LTD.

Tata Teleservices Ltd. spearheads the Tata Group's presence in the Telecom sector around US $75 billion in the financial year 2008-09 and includes over 90 companies with 3.5 million shareholders. Communications is the Tata Group's largest
investment and the Group's objective is to provide end-to-end telecommunications solutions for business and residential customers across the nation, and internationally. The Group's communications activities are currently spread primarily over four companies - Tata Teleservices Limited (TTSL) and its associate Tata Teleservices Maharashtra Limited (TTML), Tata Communication (erstwhile VSNL) and Tata Sky. Together these companies cover the full range of communications services, including:

- Telephony Services: Fixed and Mobile.
- Media and Entertainment Services : Satellite TV.
- Data Services : Leased Lines, Managed Data Networks, IP/MPLS VPN, Dial-up Internet, Wi-Fi and Broadband.
- Value-Added Services : Mobile and Broadband Content/ Applications, Calling Cards, Net Telephony and Managed Services.
- Infrastructure Services : Submarine Cable Bandwidth, Terrestrial Fiber Network and Satellite Earth Stations and VSAT Connectivity.

**Profile**

In November 2008, Tata Teleservices entered into an agreement with Japanese Telecom major NTT DOCOMO. On a broader level, the transaction is also expected to mark the beginning of a relationship of broader co-operation between Tata
Companies and the Nippon Telegraph and Telephone Corporation (NTT).

Tata Teleservices' bouquet of telephony services includes mobile services, wireless desktop phones, public booth telephony and wireline services.

**TTML Organisation**

Tata Teleservices Maharashtra Limited (TTML) spearheads the Tata Group's presence in the Indian Telecom sector by being the premier telecommunication service provider, licensed to provide services in Maharashtra (including Mumbai) and Goa.

One can be part of the Tata Indicom family in more ways than one. Through Tata Indicom, the company invites people to be their partners in revolutionizing telecom services in India. One can partner with Tata Indicom in several ways by becoming a Franchisee/Distributor for Tata Indicom Mobile, Landline connections and Post-paid Internet service.

In terms of visibility and branding Tata Indicom booths have redefined customer expectations. These booths provide consumers with utmost privacy and comfort. The technology makes sure the equipment is tamper proof and ensures accurate billing.

The Tata Indicom and Tata Docomo also mark significant milestone in Indian Telecom circle.
The late Dhirubhai Ambani dreamt of a digital India - an India where the common man would have access to affordable means of information and communication. He stated in 1999, "Make the tools of information and communication available to people at an affordable cost. They will overcome the handicaps of illiteracy and lack of mobility."

It was with this belief in mind that the Reliance Communications (formerly Reliance Infocomm) started laying 60,000 route kilometers of pan-India fibre optic backbone. This backbone was commissioned on 28 December, 2002, the auspicious occasion of Dhirubhai’s 70th birthday, though sadly after his unexpected demise on 6 July, 2002.

Reliance communication has a reliable, high-capacity, integrated (both wireless and wireline) and convergent (voice, data and video) digital network.

Shri Anil D. Ambani, is the Chairman of all listed companies of the Reliance ADA Group, viz. Reliance Communication, Reliance Capital, Reliance Energy and Reliance Natural Resources Limited.

Reliance Communication is the flagship company of the Anil Dhirubhai Ambani Group (ADAG) of companies. Listed on the
National Stock Exchange and the Bombay Stock Exchange, it is India's leading integrated telecommunication company with over 100 million customers.

Company's business encompasses a complete range of telecom services covering mobile and fixed line telephony. It includes broadband, national and international long distance services and data services along with an exhaustive range of value-added services and applications. Company consultant endeavour is to achieve customer delight by enhancing the productivity of the enterprises and individuals.

Reliance Mobile (formerly Reliance India Mobile) launched on 28 December, 2002, coinciding with the joyous occasion of the late Dhirubhai Ambani's 70th birthday, was among the initial initiatives of Reliance Communications.

The Company endeavours to further extend its efforts beyond the traditional value chain by developing and deploying complete telecom solutions for the entire spectrum of society.

The Company will leverage its strength to execute complex global-scale projects to facilitate leading-edge information and communication services affordable to all individual consumers and business in India.
It will offer unparalleled value to create customer delight and enhance business productivity. It will also enable millions of India’s knowledge workers to deliver their services globally. It has established a pan-India, high-capacity, integrated (wireless and wireline), convergent (voice, data and video), digital network, to offer services spanning the entire infocomm value chain.

Reliance Communications Ltd. earned a net income of Rs. 2,149,638 lakh from operations as on 31-3-2010.

As with all marketing tools and media, a profitable proposition is the one that takes into account user privacy and relevance. User consent can work in favour of the service provider and advertiser as they can bring them personalized, timely and relevant information by means of ads and services together - a reason that would eventually lead to mobile marketing and information working hand-in-hand.
Websites:

(1) **BSNL**

http://www.bsnl.co.in/about.htm

http://www.bsnl.co.in/company/board-directors.htm

http://www.bsnl.co.in/company/vision.htm

(2) **AIRTEL**

http://www.airtel.in/wps/wcm/connect/about+bharti+airtel/Bh arti+ Airtel/About+Bharti....

http://www.airtel.in/wps/wcm/connect/About%20Bharti%20Airtel/ bharti+ airtel/about+bharti....

http://www.airtel.in/wps/wcm/connect/About%20Bharti%20Airtel/ bharti+ airtel/media+centre/fy%202008-2009

http://www.airtel.in/wps/wcm/connect/about+bharti+airtel/Bh arti+ Airtel/Investor+Relatio...

http://www.airtel.in/wps/wcm/jsp/html/print.jsp?contentName =Pg_Bharti_cisco_and_servi...

(3) **IDEA**

http://www.ideacellular.com/IDEA.portal?-nfpb=true&portlet_MyId..

http://www.ideacellular.com/IDEA.portal?-nfpb=true&_pagelabel=IDEA_Page_About_Idea

(4) **VODAFONE**

http://www.vodafone.com/start/about-vodafone/who_we_are.html
http://www.vodafone.com/start/about-vodafone/who_we_are/history.html

http://www.vodafone.com/start/about-vodafone/who_we_are/meet_the_board.html

http://www.vodafone.com/start/about-vodafone/who_we_are/subsidiary-operations.html

(5) **TATA INDICOM**

file://H:\Tata Communications_The Tata Group.htm

http://www.tata communications.com/about/tatagroup.asp

file://F:\Tata Communications-overview.htm

file://F:\Tata Indocom-About Tata Tele Services Ltd.htm

http://www.tatateleservices.com/t-aboutus-ttsl-organization.aspx

(6) **RELIANCE**

http://www.rcom.co.in.webapp/communications/rcom/Aboutus/about....

http://www.rcom.co.in/Rcom/aboutus/overview/overview-reliancegroup.html