CHAPTER- III

KALEIDOSCOPE OF MOBILE PHONE SERVICE PROVIDERS IN INDIA AND THEIR PROFILES

3.1 History of Service Providers in India
3.2 Impact of Globalization, Liberalization and Privatization and its Impact on Telephone Network Companies
3.3 Wire line market share of network providers
3.4 Profile of Bharati Airtel
3.5 Profile of Vodafone
3.6 Profile of Idea
3.7 Profile of BSNL Bharat Sanchar Nigam Ltd (BSNL)
3.8 Profile of Tata Teleservices and Tata Docomo
3.9 Profile of Reliance Communication
3.10 Profile of Aircel
KALEIDOSCOPE OF MOBILE PHONE SERVICE PROVIDERS

3.1 HISTORY OF SERVICE PROVIDERS IN INDIA

India is emerging towards the world’s largest telecommunication users. Currently India is placed 2nd largest in the world on total number of telephone users both fixed and mobile phone.\(^{124}\) It has one of the lowest call tariffs in the world enabled by the mega phone network and with huge competition among the network providers. It has the world’s third largest internet user base. According to (IAMAI) India has 190 million internet users at the end of June 2013 \(^{125}\) and majority of the Indian telecommunication industry contacts on telephone, internet and television broadcast. The industry is facing a transformational change in network technology like digital telephone exchanges, mobile switching centre’s, media gateways and signaling gateways at the core, interconnected by a wide variety of transmission systems using fibre-optics or Microwave Radio Relay Networks. DTH, a relatively new broadcasting technology has attained significant popularity in the Television segment.

Telecommunication in India has greatly been supported by the INSAT system of the country, one of the largest domestic satellite systems in the world. India possesses a diversified communications system, which links all parts of the country by telephone, Internet, radio, television and satellite.\(^{126}\)\(^{127}\)

Indian telecom industry underwent a high place of market liberalization and growth since the 1990s and now has become the world's most competitive and one of the fastest growing telecom markets.\(^{128}\)

---


\(^{126}\)“Highlights of Telecom Subscription Data as on 31 May 2012”. TRAI. 4 July 2012.

\(^{127}\)Kannan, Shilpa, “India's 3G license bidders bank on big changes”. BBC News,(7 April 2010).

\(^{128}\)“Internet Usage in Asia”. International Telecommunications Unit: Asian Internet Users. ITU. Retrieved 10 January 2011.
The Industry has grown over twenty times in just ten years, from under 37 million subscribers in the year 2001 to over 846 million subscribers in the year 2011.

India has the world's second-largest mobile phone user base with over 929.37 million users as of May 2012.129 It has the world's third-largest Internet user-base with over 137 million as of June 2012. 130 131 The total revenue of the Indian telecom sector grew by 7% to ₹2832 billion (US$46 billion) for 2010–11 financial year, while revenues from telecom equipment segment stood at ₹1170 billion (US$19 billion).132

The telecommunication has supported socio-economic and cultural developments in India in a great way and helped significantly to reduce the gap between rural and urbanization and connectivity has redefined the data interface in India and communication both formal and informal has helped in speedy exquisite of work.

It also has helped to increase the transparency of governance with the introduction of e-governance in India. The government has pragmatically used modern telecommunication facilities to deliver mass education programmes for the rural folk of India.

---


130 Internet subscriber base in India may reach 150mn: Report


Growth chart of telephone industry in India

- Pre-1902 – Cable telegraph
- 1902 – First wireless telegraph station established between Sagar Island and Sand head.
- 1907 – First Central Battery of telephones introduced in Kanpur.
- 1927 – Radio-telegraph system between the UK and India, with Imperial Wireless Chain beam stations at Khadki and Daund. Inaugurated by Lord Irwin on 23 July by exchanging greetings with King George V.
- 1933 – Radiotelephone system inaugurated between the UK and India.
- 1953 – 12 channel carrier system introduced.
- 1960 – First subscriber trunk dialing route commissioned between Lucknow and Kanpur.
- 1975 – First PCM system commissioned between Mumbai City and Andheri telephone exchanges.
- 1979 – First optical fibre system for local junction commissioned at Pune.
- 1980 – First satellite earth station for domestic communications established at Sikandarabad, [Uttar Pradesh, Noida Sector 62SCMS].
- 1983 – First Analogue Stored Program Control exchange for trunk lines commissioned at Mumbai.
- 1984 – C-DOT established for indigenous development and production of digital exchanges.
- 1995 – First mobile telephone service started on non-commercial basis on 15 August 1995 in Delhi.
- 1995 – Internet Introduced in India starting with Laxminagar, Delhi on August 1995\(^{133}\)

3.2 IMPACT OF GLOBALIZATION, LIBERALIZATION AND PRIVATIZATION AND ITS IMPACT ON TELEPHONE NETWORK COMPANIES

Liberalization of Indian telecommunication industry started in 1981 when Prime Minister Indira Gandhi signed contracts with Alcatel CIT of France to merge with the state owned Telecom Company (ITI), in an effort to set up 5,000,000 lines per year. But soon the policy was let down because of political opposition. Subsequently Rajiv Gandhi invited Sam Pitroda, US based NRI and a former Rockwell International Executive to set a centre for Development of Telematics (C-DOT) which manufactured telephone exchanges in India for first time.

The demand for telephones was ever increasing and in the 1990s Indian government was under increasing pressure to open up the telecom sector for private investment as a part of Liberalization-Privatization-Globalization policies that the government had to accept to overcome the severe fiscal crisis and resultant balance of payments issue in 1991. Consequently, private investment in the sector of Value Added Services (VAS) was allowed and cellular telecom sector were opened up for competition from private investments. It was during this period that the Narsimha Rao - led government introduced the National Telecommunications policy (NTP) in 1994 which brought changes in the following areas: ownership, service and regulation of telecommunications infrastructure. The policy introduced the concept of telecommunication for all and its vision was to expand the telecommunication facilities to all the villages in India. They were also successful in establishing joint ventures between state owned telecom companies and international players. Foreign firms were eligible to 49% of the total stake. The multi-nationals were just involved in technology transfer, and not policy making.


Narsimha Rao run government instead liberalised the local services, taking the opposite political parties into confidence and assuring foreign involvement in the long distance business after 5 years. The country was divided into 20 telecommunication circles for basic telephony and 18 circles for mobile services. These circles were divided into category A, B and C depending on the value of the revenue in each circle. The government threw open the bids to one private company per circle along with government owned DoT per circle. For cellular service two service providers were allowed per circle and a 15 years license was given to each provider. During all these improvements, the government did face oppositions from ITI, DoT, MTNL, VSNL and other labour unions, but they managed to keep away from all the hurdles.\textsuperscript{136}

In 1997, the government set up TRAI (Telecom Regulatory Authority of India) which reduced the interference of Government in deciding tariffs and policy making.

This was a gateway to many foreign investors to get entry into the Indian Telecom Markets. After March 2000, the government became more liberal in making policies and issuing licenses to private operators. The government further reduced license fees for cellular service providers and increased the allowable stake to 74\% for foreign companies. Because of all these factors, the service fees finally reduced and the call costs were cut greatly enabling every common middle-class family in India to afford a cell phone. Nearly 32 million handsets were sold in India. The data reveals the real potential for growth of the Indian mobile market.\textsuperscript{137}

Many private operators, such as Reliance Communications, Tata Indicom, Vodafone, Loop Mobile, Airtel, Idea etc., successfully entered the high potential Indian telecom market.


\textsuperscript{137}"Draft Information Paper on Dial-up Internet Access"(PDF). Retrieved 1 September 2010.
In March 2008 the total GSM and CDMA mobile subscriber base in the country was 375 million, which represented a nearly 50% growth when compared with previous year. As the unbranded Chinese cell phones which do not have International Mobile Equipment Identity (IMEI) numbers pose a serious security risk to the country, Mobile network operators therefore suspended the usage of around 30 million mobile phones (about 8% of all mobiles in the country) by 30 April. Phones without valid IMEI cannot be connected to cellular operators. 5–6 years the average monthly subscribers additions were around 0.05 to 0.1 million only and the total mobile subscribers base in December 2002 stood at 10.5 millions. However, after a number of proactive initiatives taken by regulators and licensors, the total number of mobile subscribers has increased rapidly to over 929 million subscribers as of May 2012.

India has opted for the use of both the GSM (Global system for mobile communications) and CDMA (code-division multiple access) technologies in the mobile sector. In addition to landline and mobile phones, some of the companies also provide the WLL service. The mobile tariffs in India have also become lowest in the world. A new mobile connection can be activated with a monthly commitment of US $ 0.15 only. In 2005 alone additions increased to around 2 million per month in 2003–04 and 2004–05.

With a subscriber base of more than 929 million, the Mobile telecommunications system in India is the second largest in the world and it was thrown open to private players in the 1990s. GSM was comfortably maintaining its position as the dominant mobile technology with 80% of the mobile subscriber market, but CDMA seemed to have stabilized its market share at 20% for the time being. By May 2012 the country had 929 million mobile subscribers, up from 350 million just 40 months earlier. The mobile market was continuing to expand at an annual rate in excess of 40% coming into 2010.

---


139“TTC DOT Directs ban on usage of Chinese”,
The country is divided into multiple zones, called circles (roughly along state boundaries). Government and several private players run local and long distance telephone services. Competition has caused prices to drop and calls across India are one of the cheapest in the world.\textsuperscript{140} The rates are supposed to go down further with new measures to be taken by the Information Ministry.\textsuperscript{141} In September 2004, the number of mobile phone connections crossed the number of fixed-line connection and presently dwarfs the wireline segment by a ratio of around 20:1. The mobile subscriber base has grown by a factor of over a hundred and thirty, from 5 million subscribers in 2001 to over 929 million subscribers as of May 2012. India primarily follows the GSM mobile system, in the 900 MHz band. Recent operators also operate in the 1800 MHz band. The dominant players are Airtel, Reliance Infocomm, Vodafone, Idea cellular and BSNL /MTNL. There are many smaller players, with operations in only a few states. International roaming agreements exist between most operators and many foreign carriers. The government allowed Mobile number portability (MNP) which enables mobile telephone users to retain their mobile telephone numbers when changing from one mobile network operator to another.\textsuperscript{142} India is divided into 22 telecom circles.\textsuperscript{143}

### 3.3 WIRE LINE MARKET SHARE OF NETWORK PROVIDERS

Major sectors of telecommunication industry in India are telephony, internet, Data centers and broadcasting.

---

\textsuperscript{140} The death of STD". \textit{The Indian Express}. 12 October 2006. Retrieved 1 September 2010.


\textsuperscript{142} "Mobile number portability: Switch tele-operator!". \textit{oneindia.in}. 20 January 2011.

Figure: 3.1
WIRE-LINE MARKET SHARES OF NETWORK PROVIDERS
TELEPHONY

Figure: 3.2
WIRELESS MARKET SHARES OF NETWORK PROVIDERS AS ON 29 FEBRUARY 2012
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Andhra Pradesh</td>
<td>2.33</td>
<td>66.6</td>
<td>80.46</td>
</tr>
<tr>
<td>Assam</td>
<td>0.20</td>
<td>14.6</td>
<td>47.7</td>
</tr>
<tr>
<td>Bihar &amp; Jharkhand</td>
<td>0.56</td>
<td>62.97</td>
<td>48.37</td>
</tr>
<tr>
<td>Delhi</td>
<td>2.9</td>
<td>42.95</td>
<td>239.91</td>
</tr>
<tr>
<td>Gujarat &amp; Daman &amp; Diu</td>
<td>1.82</td>
<td>54.32</td>
<td>92.56</td>
</tr>
<tr>
<td>Haryana</td>
<td>0.59</td>
<td>23.00</td>
<td>90.86</td>
</tr>
<tr>
<td>Himachal Pradesh</td>
<td>0.30</td>
<td>7.41</td>
<td>112.29</td>
</tr>
<tr>
<td>Jammu and Kashmir</td>
<td>0.20</td>
<td>6.57</td>
<td>56.92</td>
</tr>
<tr>
<td>Karnataka</td>
<td>2.48</td>
<td>56.63</td>
<td>98.22</td>
</tr>
<tr>
<td>Kerala &amp; Lakshadweep</td>
<td>3.18</td>
<td>34.51</td>
<td>107.85</td>
</tr>
<tr>
<td>Kolkata</td>
<td>1.18</td>
<td>25.25</td>
<td>Not available*</td>
</tr>
<tr>
<td>Madhya Pradesh &amp; Chhattisgarh</td>
<td>1.13</td>
<td>53.30</td>
<td>55.38</td>
</tr>
<tr>
<td>Maharashtra &amp; Goa (excluding Mumbai )</td>
<td>2.64</td>
<td>71.00</td>
<td>96.71 ’</td>
</tr>
<tr>
<td>Mumbai*</td>
<td>3.0</td>
<td>35.93</td>
<td>Not available ’</td>
</tr>
<tr>
<td>North East ^***</td>
<td>0.25</td>
<td>8.76</td>
<td>64.74</td>
</tr>
<tr>
<td>Orissa</td>
<td>0.40</td>
<td>26.27</td>
<td>64.73</td>
</tr>
<tr>
<td>Punjab</td>
<td>1.44</td>
<td>31.17</td>
<td>110.22</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>1.14</td>
<td>49.52</td>
<td>73.26</td>
</tr>
<tr>
<td>Tamil Nadu(including Chennai since 2005) 144</td>
<td>3.16</td>
<td>78.96</td>
<td>118.29</td>
</tr>
<tr>
<td>Uttar Pradesh(East)</td>
<td>1.20</td>
<td>77.74</td>
<td>62.65(Combined)*</td>
</tr>
<tr>
<td>Uttar Pradesh(West) &amp;Uttarakhand</td>
<td>0.79</td>
<td>55.12</td>
<td>62.65(Combined)*</td>
</tr>
<tr>
<td>West Bengal(excluding Kolkata) ^**</td>
<td>0.62</td>
<td>46.79</td>
<td>80.56 ’</td>
</tr>
</tbody>
</table>

** Population statistics are available state-wise only. ^** North east circle includes Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, & Tripura ^*** West Bengal circle includes Andaman-Nicobar and Sikkim

<table>
<thead>
<tr>
<th>Rank</th>
<th>Operator's Name</th>
<th>Technology</th>
<th>Subscribers (in millions)</th>
<th>Ownership</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bharti Airtel</td>
<td>GSMEDGE, HSPA+, TD-LTE</td>
<td>287.65 (December 2013)</td>
<td>Bharti Enterprises (64.76%)  SingTel (32%)  Vodafone (4.4%)</td>
<td>28.18%  (July 2014)</td>
</tr>
<tr>
<td>2</td>
<td>Vodafone India</td>
<td>GSMEDGE, HSDPA</td>
<td>170.4 (December 2013)</td>
<td>Vodafone Group (100%)</td>
<td>23.01%  (July 2014)</td>
</tr>
<tr>
<td>3</td>
<td>idea cellular</td>
<td>GSMEDGE, HSPA</td>
<td>121 (December 2013)</td>
<td>Aditya Birla (49.05%)  Axiata Group Berhad (19.96%)</td>
<td>18.82%  (July 2014)</td>
</tr>
<tr>
<td>4</td>
<td>Reliance Communications</td>
<td>CDMA2000, EVDO REV. A, GSM, EDGE, HSDPA, HSPA+, WiMAX</td>
<td>154.1 (December 2013)</td>
<td>Reliance ADAG (67%)  Public (26%)</td>
<td>N/A</td>
</tr>
<tr>
<td>5</td>
<td>BSNL</td>
<td>GSMEDGE, HSDPA, CDMA2000, EVDO REV. 0, WiMAX, WiFi</td>
<td>97.2 (December 2013)</td>
<td>State-owned</td>
<td>13.05%  (July 2014)</td>
</tr>
<tr>
<td>6</td>
<td>Tata DoCoMo Virgin Mobile India</td>
<td>CDMA2000, EVDO REV. B, GSM, EDGE, HSPA+</td>
<td>90.1 (December 2013)</td>
<td>Tata Teleservices (74%) NTT DoCoMo (26%)</td>
<td>N/A</td>
</tr>
<tr>
<td>7</td>
<td>Aircel</td>
<td>GSMEDGE, HSDPA, TD-LTE</td>
<td>66.9 (December 2013)</td>
<td>Maxis Communications (74%)  Apollo Hospital (26%)</td>
<td>9.18%  (July 2014)</td>
</tr>
<tr>
<td>8</td>
<td>Uninor</td>
<td>GSM, EDGE</td>
<td>3.2 (October 2013)</td>
<td>UnitechWire-less (67.25%)  Unitech Group (32.75%)</td>
<td>5.40%  (July 2014)</td>
</tr>
<tr>
<td>9</td>
<td>MTS India</td>
<td>CDMA2000, EVDO REV. B</td>
<td>14 (December 2013)</td>
<td>Sistema (73.71%)  Shyam Group (23.79%)</td>
<td>N/A</td>
</tr>
<tr>
<td>10</td>
<td>Videocon</td>
<td>GSM, GPRS, EDGE</td>
<td>4 (December 2013)</td>
<td>Videocon</td>
<td>0.76%  (July 2014)</td>
</tr>
<tr>
<td>11</td>
<td>MTNL</td>
<td>GSM, HSDPA, CDMA2000</td>
<td>3.5 (December 2013)</td>
<td>State-owned</td>
<td>0.44%  (July 2014)</td>
</tr>
<tr>
<td>12</td>
<td>Loop Mobile</td>
<td>GSM, EDGE</td>
<td>3 (December 2013)</td>
<td>Khaitan Holding Group (100%)</td>
<td>0.41%  (July 2014)</td>
</tr>
<tr>
<td>13</td>
<td>T24 Mobile India</td>
<td>GSM, EDGE, HSPA+</td>
<td>3 (December 2013)</td>
<td>Tata Teleservices Future Group</td>
<td>N/A</td>
</tr>
</tbody>
</table>


146 "Axiata 2Q 2013 Results (Page 9)". axiata. listed company.com. 30 August 2013.

147 http://articles.economictimes.indiatimes.com/2012-08-07/news/33083545_1_tata-teleservices-subscriber-base-active-customers
List of Major Mobile Operators in Bangalore (GSM, CDMA)

The Mobile Operators has wide range of Services in Bangalore City with attractive and competitive offers, as one of the top IT center in India the communication important and should be faster. The Competition of Companies prevents low call rates and Mobile Prices. Bangalore is the leading City in Information technology and most of the civilians use Mobile Phones. The list below shows Major GSM and CDMA Operators that presently active in Bangalore City.

Table 3.3
MAJOR MOBILE OPERATORS IN BANGALORE (GSM, CDMA)

<table>
<thead>
<tr>
<th>GSM OPERATORS</th>
<th>Mobile Operators Name</th>
<th>Type</th>
<th>Owners</th>
<th>Products</th>
<th>Founded</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vodafone India</td>
<td>Private</td>
<td>Takshi Group, Vodafone Group</td>
<td>Mobile telephony, Wireless broadband services</td>
<td>2007</td>
<td><a href="http://www.vodafone.in">www.vodafone.in</a></td>
<td></td>
</tr>
<tr>
<td>Bharat Sanchar Nigam Limited (BSNL)</td>
<td>State Owned Enterprise</td>
<td>Government</td>
<td>Fixed line and mobile telephony, Internet services, digital television, IPTV</td>
<td>2000</td>
<td><a href="http://www.bsnl.co.in">www.bsnl.co.in</a></td>
<td></td>
</tr>
<tr>
<td>Bharti Airtel</td>
<td>Public</td>
<td>Sunil Bharti Mittal</td>
<td>Fixed line and mobile telephony, broadband and fixed-line internet services, digital television and IPTV</td>
<td>1983</td>
<td><a href="http://www.airtel.com">www.airtel.com</a></td>
<td></td>
</tr>
<tr>
<td>TATA Docomo</td>
<td>Joint Venture</td>
<td>Tata Group</td>
<td>Mobile network, Fixed Wireless Telephone, USB Internet Dongle</td>
<td>2008</td>
<td><a href="http://www.tatadocomo.com">www.tatadocomo.com</a></td>
<td></td>
</tr>
<tr>
<td>Aircel</td>
<td>Joint Venture</td>
<td>Maxis Communications</td>
<td>Mobile telephony, Wireless broadband services</td>
<td>1999</td>
<td><a href="http://www.aircel.com">www.aircel.com</a></td>
<td></td>
</tr>
<tr>
<td>Virgin GSM</td>
<td>Joint venture</td>
<td>Virgin Group, Tata Teleservices</td>
<td>Mobile telephony, broadband internet services</td>
<td>2008</td>
<td><a href="http://www.virginnmobile.in">www.virginnmobile.in</a></td>
<td></td>
</tr>
<tr>
<td>Uninor</td>
<td>Private</td>
<td>Telenor Group, Unitech Group</td>
<td>Mobile telephony, Wireless internet</td>
<td>2009</td>
<td><a href="http://www.uninor.in">www.uninor.in</a></td>
<td></td>
</tr>
<tr>
<td>CDMA OPERATORS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reliance GSM</strong></td>
<td>Private</td>
<td>Anil Ambani</td>
<td>Telecommunications</td>
<td>2004</td>
<td><a href="http://www.rcom.co.in">www.rcom.co.in</a></td>
<td></td>
</tr>
<tr>
<td><strong>Loop Mobile</strong></td>
<td>Private</td>
<td>Khaitan Group</td>
<td>Mobile Telecommunications Operator</td>
<td>1994 as BPL Mobile 2009 as Loop Mobile</td>
<td><a href="http://www.loopmobile.in">www.loopmobile.in</a></td>
<td></td>
</tr>
<tr>
<td><strong>Videocon</strong></td>
<td>Limited</td>
<td>Videocon Group</td>
<td>Mobile Telecommunications</td>
<td>1979</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CDMA OPERATORS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Loop Mobile</strong></td>
</tr>
<tr>
<td><strong>Virgin Mobile India</strong></td>
</tr>
<tr>
<td><strong>Reliance CDMA</strong></td>
</tr>
<tr>
<td><strong>Tata Indicom</strong></td>
</tr>
<tr>
<td><strong>MTS India</strong></td>
</tr>
<tr>
<td><strong>BSNL CDMA</strong></td>
</tr>
</tbody>
</table>

The following companies provide either GSM or CDMA mobile services in Karnataka (Bangalore)

**GSM Operators**

**Vodafone IN**: Formerly Hutch. Vodafone has a large user base, and is one of the top mobile networks in India. Vodafone provides 3G in Karnataka even though it doesn't have 3G license; however as per Delhi High Court ruling in April 2013, Vodafone is not allowed to provide 3G to new subscribers in Karnataka state. It makes use of Airtel's 3G networks to provide 3G to existing 3G users.

**BSNL**: BSNL provides GSM mobile services in Karnataka state and across much of India. BSNL has 3G license for Karnataka and was first operator to launch 3G in Karnataka.

**AirTel**: AirTel is owned by Bharti Group. AirTel launched its 3G in Bangalore on 25 Jan 2011 as its first circle. With this launch AirTel becomes the third operator and second private operator to launch 3G in India. Airtel also holds 4G license in Bangalore and had launched its 4G services in Bangalore on May 7, 2012.

**Idea Cellular**: Idea, India's 3rd largest mobile operator. It acquired Spice Telecom on Jan 2 2009 and made its entry to Karnataka and has expanded its coverage to larger part of Karnataka. Idea doesn't have 3G license for Karnataka therefore it provides 3G services through.

**Aircel's 3G Network**: Aircel: Chennai-based Aircel launched its GSM operations in Karnataka on March 2009. Aircel has 3G license for Karnataka and provides 3G services in most of the cities. It has very less network coverage limited only to District level and not even complete district head quarters.

---

Reliance GSM (405 10): Reliance newly started their GSM service in 2009. Reliance GSM doesn't have 3G license for Karnataka therefore it provides 3G services Under ICR with Aircel 3G network.

TATA DOCOMO: Has 3G services in Bangalore.

CDMA Operators

Reliance CDMA: Reliance is one of the largest CDMA mobile operators in India. It has a huge user base and extends to small towns. Operations started in 2003.

MTS: Karnataka gets its third CDMA Operator called "MTS". Sistema-Shyam group owned MTS launched its CDMA services in Karnataka on October 29, 2009. MTS is the 8th mobile service provider that made its entry to Karnataka.

TATA Docomo: Formerly known as Tata Indicom having good coverage of CDMA services.
3.4 PROFILE OF BHARATI AIRTEL

Bharti Airtel, incorporated on July 7, 1995 is the flagship company of Bharti Enterprises. The Bharti Group, has a diverse business portfolio and has created global brands in the telecommunication sector. Bharti Airtel, is Asia’s leading integrated telecom services provider with operations in India and Sri Lanka. Bharti Airtel has been at the forefront of the telecom revolution and has transformed the sector with its world-class services built on leading edge technologies.

Bharti Enterprises is one of India’s leading business groups with interests in telecom, retail, manufacturing, agri business and financial services. Bharti has recently forayed into retail business as Bharti Retail Pvt. Ltd. under a MoU with Wal-Mart for the cash & carry business. It has successfully launched an international venture with EL Rothschild Group to export fresh agri products exclusively to markets in Europe and USA and has launched Bharti AXA Life Insurance Company Ltd under a joint venture with AXA, world leader in financial protection and wealth management.

Airtel is the world's third largest mobile telecommunications company by subscribers, with over 275 million subscribers across 20 countries as of July 2013. It is the largest cellular service provider in India, with 192.22 million subscribers as of August 2013. Airtel is the Second largest Asia-Pacific mobile operator by subscriber base, behind China Mobile. It offers its telecom services under the "airtel" brand, and is headed by Sunil Bharti Mittal. Bharti Airtel is the first Indian telecom service provider to achieve Cisco Gold Certification. It also acts as a carrier for national and international long distance communication services. The company has a submarine cable landing station at Chennai, which connects the submarine cable connecting Chennai and Singapore.
Bharti Airtel is India’s largest integrated and the first private telecom services provider with a footprint in all the 23 telecom circles. Bharti Airtel since its inception has been at the forefront of technology and has steered the course of the telecom sector in the country with its world class products and services.150

The businesses at Bharti Airtel have been structured into three individual strategic business units (SBU’s) - Mobile Services, Airtel Telemedia Services & Enterprise Services. The mobile business provides mobile & fixed wireless services using GSM technology across 23 telecom circles while the Airtel Telemedia Services business offers broadband & telephone services in 95 cities and has recently launched India's best Direct-to-Home (DTH) service, Airtel digital TV. The Enterprise services provide end-to-end telecom solutions to corporate customers and national & 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.

Airtel is the world's third largest mobile telecommunications company by subscribers, with over 275 million subscribers across 20 countries as of July 2013.151 It is the largest cellular service provider in India, with 192.22 million subscribers as of August 2013.152 Airtel is the Second largest Asia-Pacific mobile operator by subscriber base, behind China Mobile

152Mathew, James; Delhi, New (2 December 2001). "France Tele to transfer entire stake in BPL Mobile". The Times Of India. Retrieved 9 June 2012.
3.5 PROFILE OF VODAFONE

Vodafone India is a member of the Vodafone Group and commenced operations in 1994 when its predecessor Hutchison Telecom acquired the cellular license for Mumbai. The company now has operations across the country with over 150 million customers. Vodafone India has firmly established a strong position within the Vodafone Group too, making it the largest subscriber base globally. This journey is a strong testimony of Vodafone’s success in a highly competitive and price sensitive market.\(^\text{153}\) Vodafone Group is one of the world's largest mobile communications companies by revenue with over 398 million customers as at December 31, 2011. Vodafone currently has equity interests in over 30 countries across five continents and more than 40 partner networks worldwide.

\textbf{Vodafone Ltd} is the second largest mobile network operator in India after Airtel by subscriber base. It is headquartered in Mumbai, Maharashtra.\(^\text{154}\) It has approximately 160 million customers as of December 201. It offers both prepaid and postpaid GSM cellular phone coverage throughout India with good presence in the metros.

In July 2011, Vodafone Group bought the mobile phone business of its partner Essar for $5.46 billion. This meant Vodafone owns 74% of Essar. On 11 February 2007, Vodafone agreed to acquire the controlling interest of 67% held by Li KaShing Holdings in Hutch-Essar for US$11.1 billion, pipping Reliance Communications, Hinduja Group, and Essar Group, which is the owner of the remaining 33%. The whole company was valued at USD 18.8 billion.

\(^{154}\) India’s 3G Auction Ends; Operator And Circle-Wise Results – MediaNama
The transaction closed on 8 May 2007. In April 2014, India based Piramal Group sold its 11% Stake in Vodafone India to Prime Metals, an indirect subsidiary of Vodafone Group.155

Serving the needs of an enterprise, Vodafone Business Solutions is a total communications offering that caters to all their voice and data, wireless and Fixed-line requirements. With the advantage of global expertise and experience and the knowledge of local markets, the business is run through the following verticals – Vodafone Global Enterprise, SME division, National corporate and key accounts. Since its inception, Vodafone Business Solutions has garnered over 3 million corporate customers in India and currently provides services to over 6000 Global and national accounts equipped with a robust and superior network infrastructure and a 24x7 NOC. Vodafone has been recently awarded the 'Enterprise Mobile Service Provider of the Year' at the 2012 Frost & Sullivan India ICT Awards.

3.6: PROFILE OF IDEA

Idea Cellular is an Aditya Birla Group Company, India’s first truly multinational corporation. Idea is a pan-India integrated GSM operator offering 2G and 3G services, and has its own NLD and ILD operations, and ISP license. With revenue in excess of $4 billion; revenue market share of nearly 15%; and subscriber base of over 121 million in FY 2013, Idea is India’s 3rd largest mobile operator. Idea ranks among the Top 10 country operators in the world with a traffic of over 1.5 billion minutes a day.

The group operates in 25 countries, and is anchored by over 1,00,000 employees belonging to 25 nationalities. The Group has been adjudged 'The Best Employer in India and among the Top 20 in Asia' by the Hewitt-Economic Times and Wall Street Journal Study 2007. Idea’s robust pan-India coverage is built on a network of over 1,00,000 2G and 3G cell sites, spread across over 55,000 towns in India.

Using the latest in technology, Idea provides world-class service delivery through the most extensive network of customer touch points, comprising of nearly 4,500 exclusive Idea outlets, and over 7,000 call centre seats. Idea’s customer service delivery platform is ISO 9001:2008 certified, making it the only operator in the country to have this standard certification for all 22 service areas and the corporate office.

---

157 Pahwa, Nikhil (19 May 2010). "India’s 3G Auction Ends; Operator And Circle-Wise Results”.
Idea has consistently stayed ahead of the industry in VLR reporting. Idea’s thought leadership on Mobile Number Portability (MNP) has enabled it to stay as the top gainer with highest net gain. Every 4th mobile user who exercises choice through MNP prefers Idea.

Idea offers a range of high-speed mobile broadband devices including Android based 3G smart phones, dongles etc. Idea’s wide portfolio of 3G smart phones offer the latest in 3G applications and high-end data services such as Idea TV, games, social networking etc., at most affordable prices. 159160

Idea has been a pioneer in introducing customized product offerings for segmented customers. It is the first mobile operator to introduce innovative value added services in the Indian telephony market, and has remained ahead of the industry in data product offerings.

Idea won the ‘Best Brand Campaign’ at the esteemed World Communication Awards in 2012 & ‘11. It won the GSM Association Award for ‘Best Billing and Customer Care Solution’ for two consecutive years, and was awarded ‘Mobile Operator of the Year Award – India’ for 2007 and 2008 at the Annual Asian Mobile News Awards. 161

161 Brand Trust Report 2013
3.7 PROFILE OF BSNL BHARAT SANCHAR NIGAM LTD (BSNL)

Bharat Sanchar Nigam Ltd (BSNL), then known as the Department of Telecommunications, had been a near monopoly during the socialist period of the Indian economy. During this period, BSNL was the only telecom service provider in the country. MTNL was present only in Mumbai and New Delhi. Bharat Sanchar Nigam Ltd. was incorporated on 15th September 2000. It took over the business of providing of telecom services and network management from the erstwhile Central Government Departments of Telecom Services (DTS) and Telecom Operations (DTO), with effect from 1st October 2000 on going concern basis. It is one of the largest & leading public sector units providing comprehensive range of telecom services in India. 162 163

BSNL has installed Quality Telecom Network in the country & now focusing on improving it, expanding the network, introducing new telecom services with ICT applications in villages & winning customer's confidence. Today, it has about 43.74 million line basic telephone capacity, 8.83 million WLL capacity, 72.60 million GSM capacity, 37,885 fixed exchanges, 68,162 GSM BTSs, 12,071 CDMA Towers, 197 Satellite Stations, 6,86,644 RKm. of OFC, 50,430 RKm. of microwave network connecting 623 districts, 7330 cities/towns & 5.8 lakhs villages.

BSNL has taken initiatives to bridge the rural-urban digital divide in ICT sector. In fact there is no telecom operator in the country to beat its reach with its wide network giving services in every nook & corner of the country & operates across India except New Delhi & Mumbai. BSNL serves its customers with a wide bouquet of telecom services namely Wireline, CDMA mobile, GSM mobile, Internet, Broadband, Carrier service, MPLS-VPN, VSAT, VoIP, IN Services, FTTH, etc.

BSNL is numerouno of India in all services in its license area. The company offers wide ranging & most transparent tariff schemes designed to suit every customer. BSNL has 90.09 million cellular & 5.06 million WLL customers as on 31.07.2011. 3G Facility has been given to all 2G connections of BSNL. In basic services, BSNL is miles ahead of its rivals, with 24.58 million wire-line phone subscribers i.e. 71.93% share of the wire-line subscriber base.

BSNL has set up a world class multi-gigabit, multi-protocol convergent IP infrastructure that provides convergent services like voice, data & video through the same Backbone & Broadband Access Network. At present there are 8.09 million broadband customers. The company has vast experience in planning, installation, network integration & maintenance of switching & transmission networks & also has a world class ISO 9000 certified Telecom Training Institute.
3.8 PROFILE OF TATA TELESERVICES AND TATA DOCOMO

Tata Teleservices Limited spearheads the Tata Group’s presence in the telecom sector. The Tata Group includes over 100 companies, over 450,000 employees worldwide and more than 3.8 million shareholders. Incorporated in 1996, Tata Teleservices Limited was the pioneer of the CDMA 1x technology platform in India, embarking on a growth path after the acquisition of Hughes Tele (India) Ltd., [renamed Tata Teleservices (Maharashtra) Limited] by the Tata Group in 2002.

On 5 November 2010, Tata DOCOMO became the first private sector telecom company to launch 3G services in India. Tata DOCOMO had about 42.34 million users at the end of December 2010.  

Tata groups brought its brand CDMA, GSM, Walky (fixed wireless phones), photons, internet under the tata docomo name and all subscribers to these services were merged to docomo brand. Tata Teleservices Limited also has a significant presence in the 2G GSM space, through its joint venture with NTT DOCOMO of Japan, and offers differentiated products and services. Tata Docomo was born after Tata Group’s strategic alliance with Japanese telecom major NTT DOCOMO in November 2008. One of the key milestones in October 2011 was the brand integration exercise at Tata Teleservices Limited, which saw the Company’s many brands being consolidated under its single flagship brand, Tata Docomo. This helped Tata Teleservices leverage the benefits of brand synergies and capitalize on its vast retail and distribution network, which is the largest amongst all private telecom operators in the country.

3.9 PROFILE OF RELIANCE COMMUNICATIONS LTD

Reliance Communications Ltd. (commonly called RCOM) is an Indian Internet access (commonly called "broadband") and telecommunications company headquartered in Navi Mumbai, India. RCOM is India's second largest telecom operator, only after Bharti Airtel. It is the 15th largest mobile phone operator with over 150 million subscribers. Established in 2004, it is a subsidiary of Reliance Anil Dhirubhai Ambani Group.

Reliance communication Ltd 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. Their constant endeavour is to provide an enhanced customer experience and achieve customer satisfaction by upscaling the productivity of the enterprises and individuals we serve.

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. It marked the auspicious beginning of Dhirubhai’s dream of ushering in a digital revolution in India. Today reliance communication is bestowing it in the hands of the common man at affordable rates.

With over 150 million subscribers across India, Reliance Mobile is India’s largest mobile service brand. Reliance Mobile services now cover over 24,000 towns, 6 lakh villages, and still counting.
What sets Reliance Mobile apart is the fact that nearly 90 per cent of our handsets are data-enabled, and can access hundreds of Java applications on Reliance Mobile World.

Reliance Mobile has ushered in a mobile revolution by offering advanced multimedia handsets to the common man at very affordable rates. This innovative low pricing has increased the number of mobile phone users and its result is clearly reflected in the meteoric rise in India’s tele-density over the past four years.

Pan-India wireless network runs on CDMA2000 1x technology, which has superior voice and data capabilities compared to other cellular mobile technologies. CDMA2000 1x is more cost-effective as it utilizes the scarce radio spectrum more efficiently than other technologies do. Enhanced voice clarity, superior data speed of up to 144 kbps and seamless migration to newer generations of mobile technologies is some of its key differentiators.\textsuperscript{165}

\textsuperscript{165} TRAI Telecom Subscription Data - December 2012
3.10 PROFILE OF AIRCEL

Aircel is an Indian mobile network operator headquartered in Chennai, which offers voice & data services ranging from postpaid and prepaid plans, 2G and 3G services, Broadband Wireless Access (BWA), Long Term Evolution (LTE) to Value-Added-Services (VAS). In 2006, Aircel was acquired by Malaysia’s biggest integrated communications service provider Maxis (Maxis Communication Berhard) and is a joint venture with Sindya Securities & Investments Pvt Ltd., - Maxis holds 74% equity in the company.

Aircel commenced operations in 1999 by Chinnakannan Sivasankaran and today is the leading mobile operator in Tamil Nadu, Assam, Odisha, North-East India and Chennai. It is India’s fifth largest GSM mobile service provider and seventh largest mobile service provider (both GSM and CDMA)\(^{166}\) with a subscriber base of over 65.1 million. It has a market share of 7.33% among wireless operators (includes GSM, CDMA, and FWP operators) in the country.

Aircel has also obtained permission from the Department of Telecommunications (DoT) to provide international long distance (ILD) and national long distance (NLD) telephony services. It also has the largest service in Tamil Nadu.

The Aircel Group, formed in 1994, offers affordable and outstanding mobile services to a vast subscriber base in India. Aircel has a vision of delighting its customers by giving them the respect they deserve. Their goal is to provide our customers with exemplary service and persistently look for new ways to surpass their expectations.

\(^{166}\)“India’s 3G Auction Ends; Operator and Circle-Wise Results”. Retrieved 21 May 2013.
In addition to their leadership position in Tamil Nadu, Aircel met with extraordinary success in the Eastern frontier circles. Customer satisfaction and managed to emerge as the market leaders in Assam and North Eastern states within 18 months of operations. During this period, our company gained a strong foothold in 10 circles, to provide better access to our customers. The company is present in all 23 telecom circles including Chennai, Tamil Nadu, Assam, North East, Orissa, Bihar, Jammu & Kashmir, Himachal Pradesh, West Bengal, Kolkata, Kerala, Andhra Pradesh, Karnataka, Delhi, UP(West), UP(East), Maharashtra & Goa, Mumbai, Haryana, Madhya Pradesh, Punjab, Gujarat and Rajasthan.

Aircel provides 3G services in Andhra Pradesh, Assam, Bihar & Jharkhand, Chennai, Jammu & Kashmir, Karnataka, Kerala, Kolkata, North East, Orissa, Punjab, Tamil Nadu, UP East and West Bengal.

Aircel offers its customers, services and products that are easy to understand and use. All offerings are stimulating and at the same time extremely unique as Aircel continue to re-invent it constantly to deliver the best and most up-to-date services. The brand instills a felling of pride, confidence and reliance among all stakeholders by anticipating their desires and fulfilling the same efficiently.

---

167 “India’s 3G Auction Ends; Operator and Circle-Wise Results”. Retrieved 21 May 2013.