Indian telecom market is one of the fastest growing markets in the world today. India stands at second position in terms of subscribers after China. Although the gap between two countries is huge at this moment but the pace with which Indian market is moving will surely reduce this difference soon. India is adding on average 8-10 million new mobile subscribers every month.

This report intends to present the valuable Indian Telecom statistics in a simplified form. The report focuses on performance of telecom sector. The report covers the rural market statistics also as this is one market which has the highest potential today. The data has been presented in tabular form and chart form.

Vital Statistics of Indian Telecom Industry

Company	Revenue (Yearly) Bn March 09	PAT (Yearly) Bn March 09	Revenue (quarterly) Bn June 09	PAT (quarterly) Bn June 09	Market cap	PE	Ebitda Multiple
Reliance communication	136.95	23.52	31.97	3.7	10.6B		86.2B
Tata Teleservices	20.54	-1.59	5.1	-0.23	1.3B		5.8B
Airtel	327.92	77.43	90.56	26.87	32.0B	17.1x	156.8B
Idea	99.16	10.08	28.18	3.09	5.0B	25.1x	24.8B
MTNL	53.04	2.14	10.85	-0.46	1.2B	26.7x	2.3B
Shyam Telecom	1.9	0.0095	0.68	0.0015	0.0146B	13.9x	.103B

Even in the recession times Indian telecom market stood strong and performed well. The year saw highest FDI so far showing the sector's potential.

The report comprises the detailed analysis of various telecom areas like wireless, wire line, broadband, internet, Broadcasting and cable services etc.

(As on 31st March 2009)

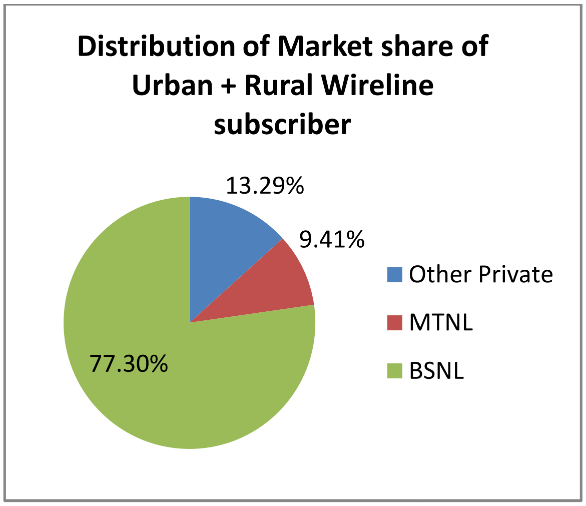
Telecom Subscribers (Wireless +Wireline)

Total Subscribers	429.72 Million
% Growth During Quarter	11.68%
Urban Subscribers	309.43 Million (72%)
Rural Subscribers	120.29 Millions (28%)
Overall Teledensity	36.98
Urban Teledensity	88.66
Rural Teledensity	14.8

Wireline Subscribers

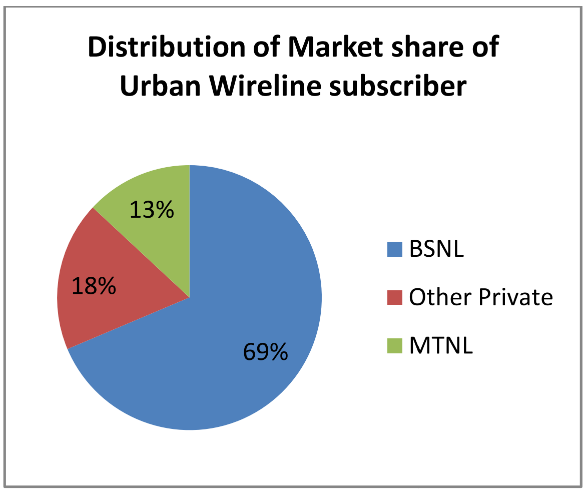
Total Wireline Subscribers	37.96 Million
% Growth During Quarter	0.15%

Urban Wireline Subscriber	27.38 Million (72.13%)
Rural Wireline Subscribers	10.58 Millions (27.87%)
Village Public Telephones (VPT)	5.61 Million
Public Call Office (PCO)	6.20 Million
Wireless Subscribers	
Total Wireless Subscribers	391.76 Million
% Growth During Quarter	12.93%
Urban Wireless Subscribers	282.05 Million (72%)
Rural Wireless Subscribers	109.71 Million (28%)
GSM Subscribers	297.26 Million (75.88%)
CDMA Subscribers	94.50 Million (24.12%)
Internet & Broadband Subscribers	
Total Internet Subscribers (including Broadband)	13.54 Million
% Growth During Quarter	5.30%
Broadband Subscribers	6.22 Million
Wireless Data Subscriber	117.82 Million
Broadcasting & Cable Services	
Total Number of Registered Pay Channels with I & B Ministry	436
Total Number of Pay Channels	130
Maximum Number of Free to Air Channels in any network	168
Number of FM Radio	245
No of DTH licensees	6
DTH Subscribers	13.09 Millions
No of Set Top Boxes	770053
Telecom Finance & Accounts	
Gross Revenue	Rs. 40444.66 Crore
% Increase in GR during Quarter	2.63%
Adjusted Gross Revenue (AGR)	Rs. 29725.37 Crores
% Increase in AGR during Quarter	2.71!
AGR Public Sector	Rs. 8443 Crores (28.40%)
AGR Private Sector	Rs. 21282 Crores (71.60%)
Average Revenue Per User (ARPU) GSM	Rs. 205
Average Revenue Per User (ARPU) CDMA	Rs. 99
Minutes of Usage (MOU) GSM	484 Minutes
Minutes of Usage (MOU)	CDMA 352 Minutes
Minutes of Usage for Internet Telephony	131.63 Millions

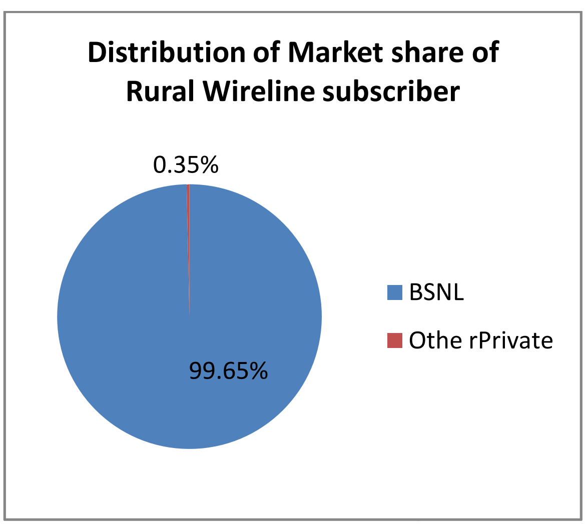


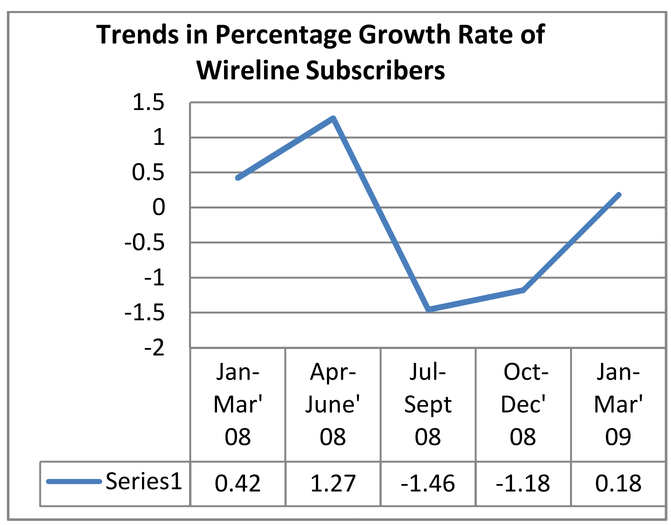
As on 31st March 2009, the total subscriber base of fixed (Wireline) lines stood at 37.96 million. The incumbents BSNL and MTNL have 77.30% and 9.41% market share respectively in the subscriber base, while all the five private operators together have 13.29% share.

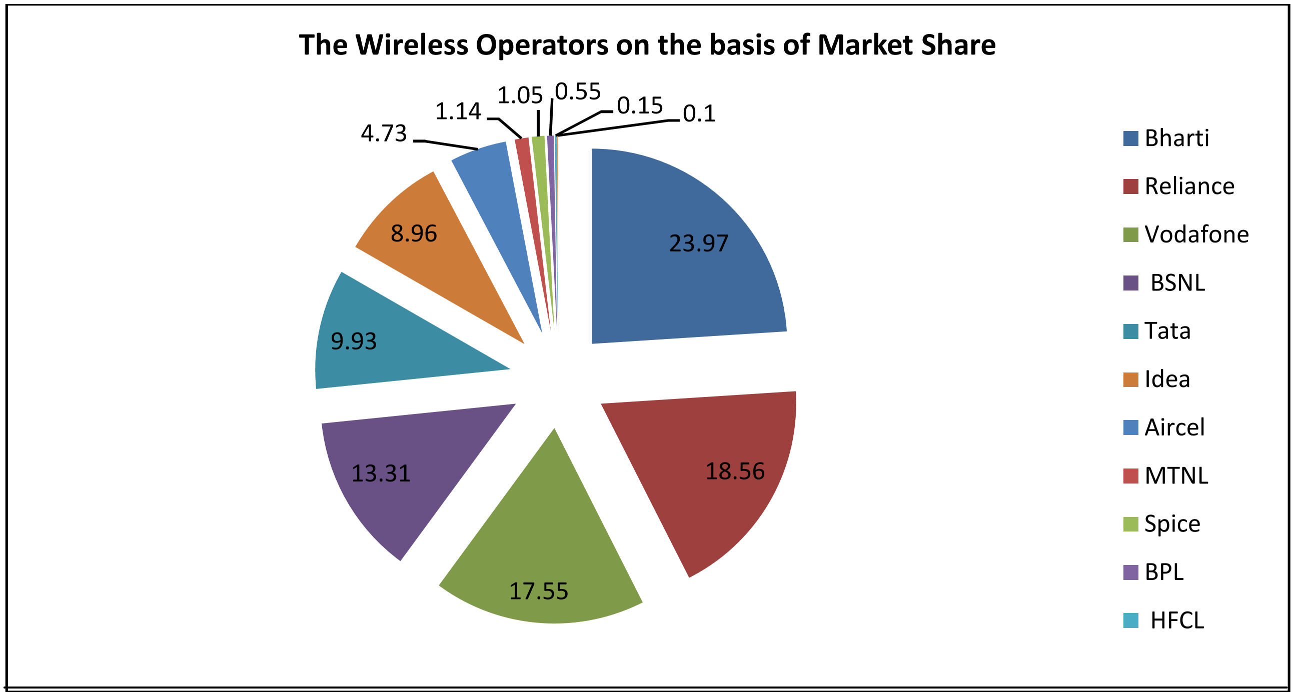
During the quarter ending March 2009 the Fixed (Wireline) subscriber base registered an increase of 66,457 lines. The net number of fixed (wireline) has increased to 37,964,612 as on 31st March 2009 from 37,898,155 in the quarter ending December 2008. The overall percentage increase in subscriber base during the quarter is 0.18%.



During the quarter ending 31st March 2009 some service providers have reported increase in their respective wireline subscriber base such as M/s Bharti Airtel Ltd. from 26,19,462 to 27,26,240(+106,778), M/s Tata Teleservices Ltd. (TTL) (including TT(M)L) from 871,351 to 918,680(+47,329), M/s Reliance Communications Ltd. (RCL) from 10,74,218 to 11,08,564 (+34,346), M/s MTNL from 35,33,811 to 35,73,206 (+39395) and M/s HFCL Infotel Ltd. from 156,887 to 162,217 (+5,330). The reduction in the subscriber base of Wireline during the quarter ending March' 09 is reported by M/s BSNL from 295, 00,460 to 293, 46,431 (-1, 54,029) and M/s Shyam Telelink Ltd. from 141,966 to 129,274 (-12,692).







All Cellular Mobile Service Providers have achieved prescribed TRAI benchmark in respect of the following parameters:-

1. Accumulated down time of Community isolation
2. %age of calls answered (electronically) within 20 sec.
3. %age of complaints resolved within 4 weeks.
4. Period of all refunds/payments due to customers from the date of resolution of complaints.

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

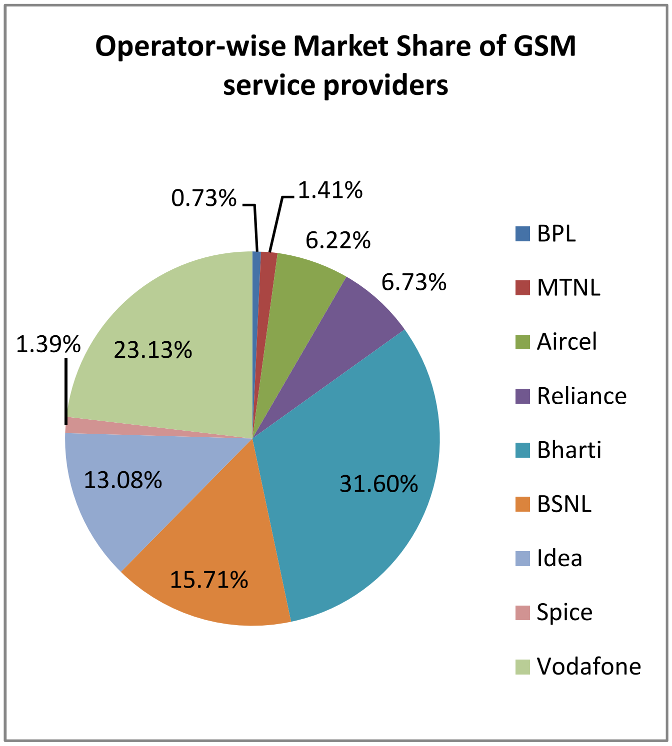
1. Call Set-Up Success Rate (Within Licensee's Own network).
2. Blocked Call rate (SDCCH/paging channel congestion and TCH Congestion)
3. Call Drop Rate
4. Response time to the customer for assistance

(i) %age of calls answered (electronically) within 40 sec

(ii) %age of calls answered (voice to voice) within 90 sec

5. Complaints per 100 bills issued
6. Service Access Delay

The performance has deteriorated in this quarter as compared to the previous quarter related to the parameters like %age of Connections with good voice quality, Response time to the customer for assistance (i) %age of calls answered (voice to voice) within 60 seconds.



Key indicators of GSM

Subscriber base: 288 million

Share of prepaid: 94%

Incoming MOU per sub per month: 249

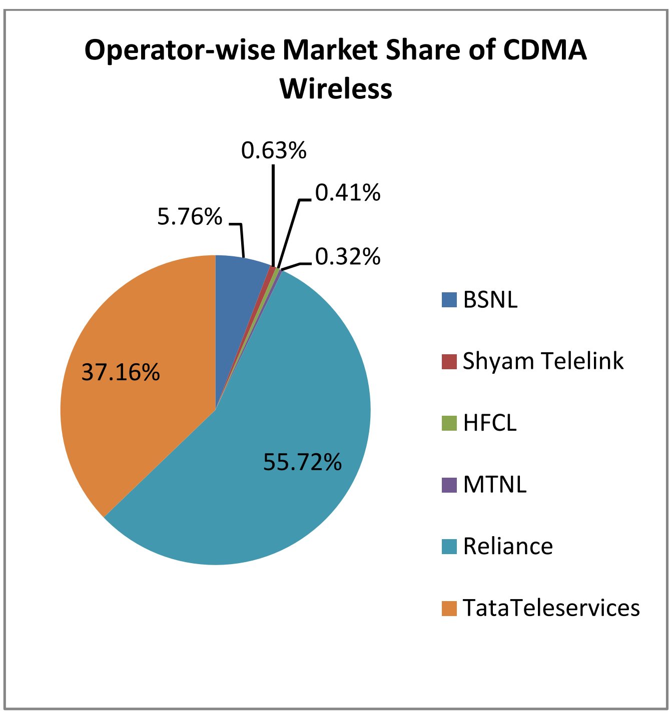
Outgoing MOU per sub per month: 235

Outgoing SMS per sub per month: 30

ARPU (Rs. per month): 205

Variation in Key Indicators over Last Quarter

Subscriber base (Million): 11.8%
Share of prepaid (%): 0.7%
Incoming MOU per sub per month: -2.5%
Outgoing MOU per sub per month: -2.4%
Outgoing SMS per sub per month: 1.5%
ARPU: -6.5%

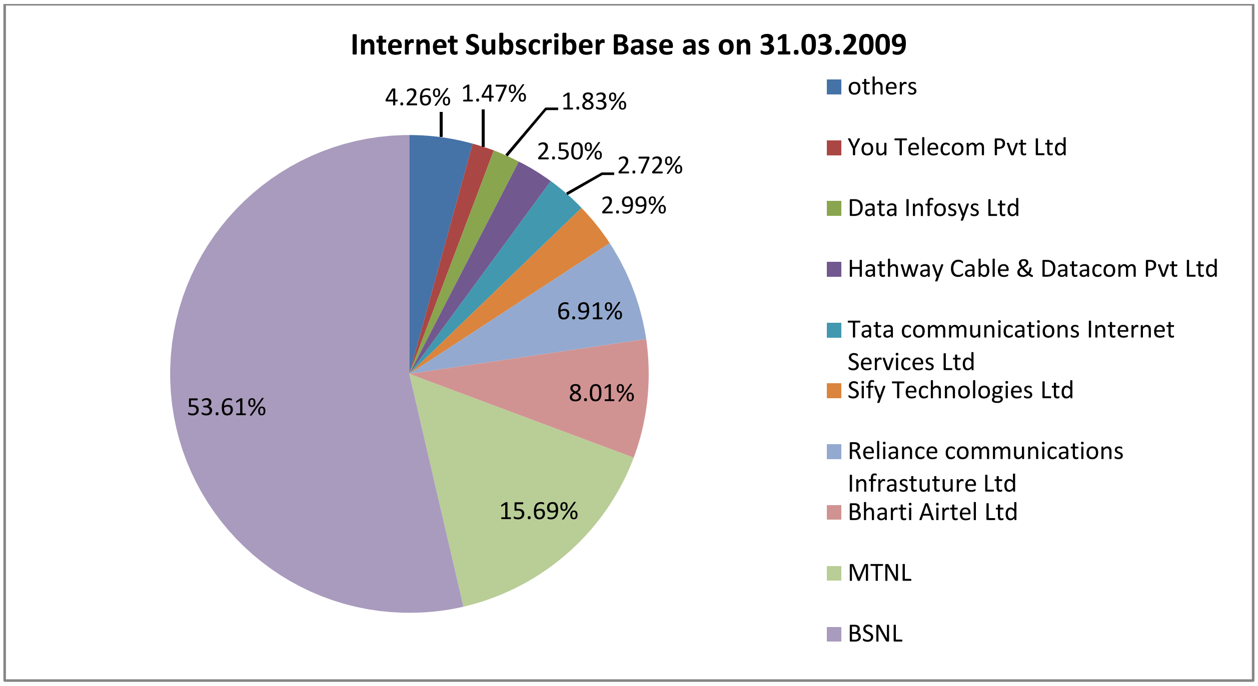


Key Indicators for CDMA

Subs base (Million): 75.81
Share of Prepaid Subs: 92.9%
Incoming MOUs per sub per month: 192
Outgoing MOU per sub per month: 164
Outgoing SMS per sub per month: 10
ARPU (Rs. Per month):99

Variation in Key Indicators over Last Quarter

Subscriber base: 6%
Share of Prepaid Subs: 6.47%
Incoming MOUs per sub per month: -4.5%
Outgoing MOU per sub per month: -3.5%
Outgoing SMS per sub per month: -23.52%
ARPU (per month):-10.9%



There are 13.54 million Internet subscribers at the end of March 2009 as compared to 12.85 million at the end of December 2008 registering a growth of 5.30%. This growth rate in quarter ending March 2009 is higher than the growth rate of 5.01% at the end of December 2008.

Among 167 ISPs reported their subscribers figure for Quarter ending 31st March 2009, Bharat Sanchar Nigam Ltd (BSNL) has retained its top position and reported a subscriber base of 7.26 million Internet subscribers against 6.70 million at the end of last quarter. Mahanagar Telephone Nigam Limited (MTNL) has retained second position with a subscriber's base of nearly 2.12 million. M/s Bharti Airtel Ltd is third with subscriber base of 1.08 million.

Besides above, there are 117.82 million wireless subscribers at the end of March 2009 (capable of accessing data services including Internet through mobile handset (GSM/ CDMA)).

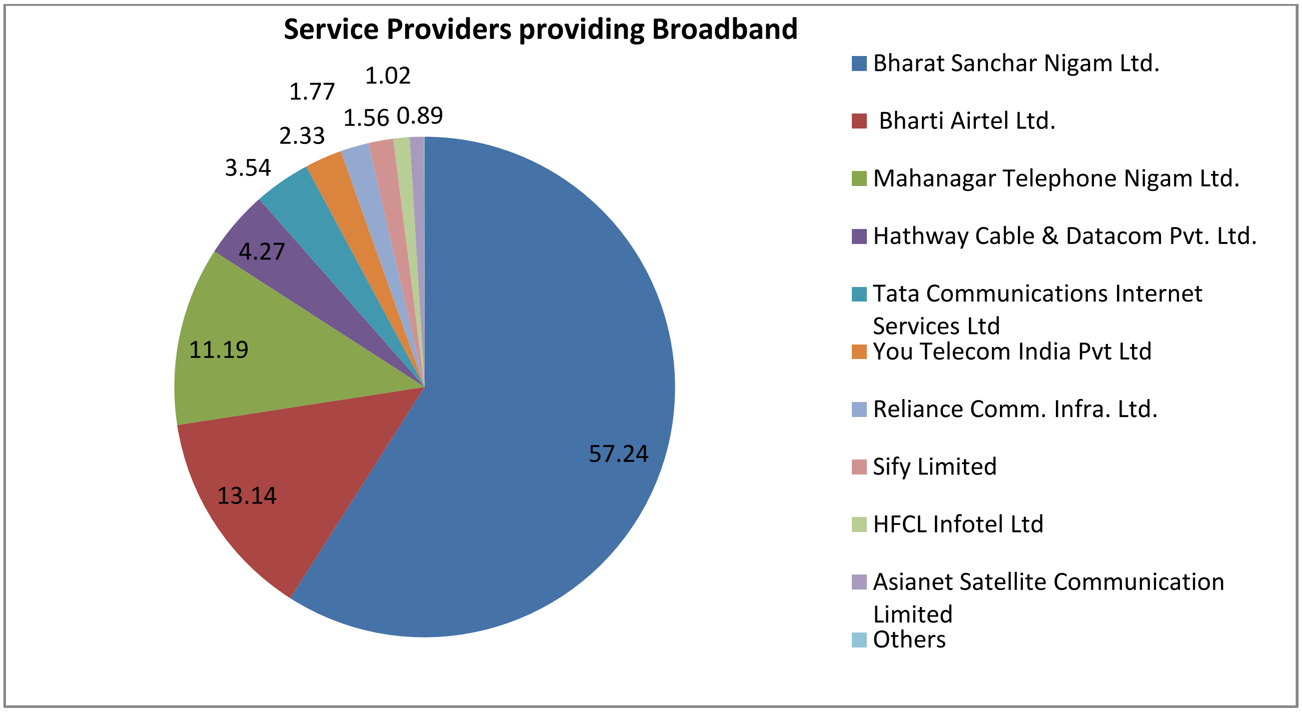
International connectivity:
The bandwidth owned by various ISPs for their ISP operations and Internet Leased lines is reported to be 209 GB for International and 174 GB for National at the end of March 2009

Internet Telephony:
The Internet Telephony has been permitted to all Internet service providers w.e.f 24th August 2007. During the quarter ending 31st March 2009 total 34 ISPs have been providing Internet Telephony services. Total minutes of usage for Internet Telephony during the quarter were 131.63 million, as compared to 133.23 million for the last quarter.

Leased Lines Connectivity:

Year	Numbers of Internet Leased Line connections
End of March 2009	24883
End of December 2008	24203

Broadband Connectivity (>=256 Kbps):
The number of Broadband subscribers (with a download speed of 256 Kbps or more) was 6217738 at the end of March 2009. Out of these 5363927 are DSL based; 473637 Cable Modem; 244439 Ethernet LAN; 42203 Fibre; 721836 Wireless customers; Leased Line 20172 and 1524 Others



Regulations on 'Quality of Service of Broadband Service Regulations 2006' came into force with effect from 1st Jan 2007. Total number of Service providers providing Broadband is 95 in this quarter as compared to 84 in last quarter (December 2008). Eleven new service providers are added in this quarter.

Broadcasting and Cable Services

- In the Quarter ending 31st March 2009 based on the data received from 19 Broadcasters/their distributors across the country; there are total 130 pay channels. However, the maximum number of Free-to-Air (FTA) and Pay Channels being carried in any particular cable networks as reported by Multi System Operators are 168 and 118 respectively.
- Maximum number of channels being carried by any of the reported MSO in digital mode is 233; whereas in conventional analogue form, the maximum number of channels being carried by any of the reported MSOs is 100 channels.
- Apart from All India Radio, there were 245 FM Radio station in operation as on 31st December 2008. During the quarter ending 31st March 2009, no new private FM radio station came into operation.
- No DTH license was issued during the quarter ending 31st March 2009. Therefore, at present, apart from free DTH service of Doordarshan, there are 6 private DTH licensees. Out of these 6 licensees, 5 licensees are offering pay DTH services to the customers as on

31.03.2009, while remaining one is in the process of rolling out its services. Total number of reported registered subscribers being served by these five Private DTH operators is 13.09 million at the end of quarter ending 31st March 2009.

- At the quarter ending 31st December 2008, out of 60 licensees of community radio stations, 41 stations were in operation. In the quarter ending 31st March 2009, 7 licenses were issued. Now, out of 67 licensees, 41 stations are in operation.

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- Upto quarter ending 31st December 2008, there were 54 Teleport Service Providers in operation in India. In the quarter ending 31^{st} March 2009, one new license was issued. Now at the end of quarter ending 31st March 2009, 55 Teleport service providers are in operation.

Year	Set top boxes (STBs)	CAS notified areas
End of March 2009	770053	Delhi, Mumbai, Kolkata and Chennai
End of December 2008	767616	Delhi, Mumbai, Kolkata and Chennai

Source: TRAI and NSE India

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