

- ▶ An overview of key telecom and internet subscriber data for the Indian market
- ▶ Key data covered:
 - Mobile telecom subscriber analysis – by operator
 - Mobile telecom subscriber analysis – Net Additions by operator
 - Fixed line telecom subscriber analysis
 - Internet subscriber analysis – by ISP

Metric	Value	Date
No. of subscribers		
Mobile	687.7 million	September 2010
Fixed line	35.57 million	September 2010
Internet	16.7 million	June 2010
% change (previous 12 months)		
Mobile	+46%	
Fixed line	-4.5%	
Internet	+19%	

Mobile telecom subscriber analysis – by operator

	Dec-04	Mar-05	Jun-05	Sep-05	Dec-05	Mar-06	Jun-06	Sep-06	Dec-06	Mar-07	Jun-07	Sep-07	Dec-07	Mar-08	Jun-08	Sep-08	Dec-08	Mar-09	Jun-09	Sep-09	Dec-09	Mar-10	Jun-10	Sep-10	
No. of subscribers (millions)																									
Bharti	9.83	10.98	12.26	14.07	16.33	19.58	23.09	27.06	31.97	37.14	42.70	48.88	55.16	61.98	69.38	77.48	85.65	93.92	102.37	110.51	118.86	127.62	136.62	143.29	
Reliance	10.15	10.45	11.65	12.99	14.68	17.31	22.52	25.98	29.98	28.01	32.91	36.32	40.96	45.79	50.79	56.05	61.35	72.67	79.62	86.12	93.79	102.42	110.81	117.34	
BSNL	8.90	9.90	10.69	12.38	14.83	17.65	21.02	23.70	26.60	30.98	32.05	34.13	36.81	40.79	41.96	43.86	46.23	52.14	54.36	58.76	62.90	69.45	72.69	78.32	
Vodafone Essar	7.18	7.80	8.44	9.71	11.41	15.36	17.54	20.36	23.31	26.44	30.75	35.66	39.86	44.13	49.20	54.62	60.93	68.77	76.45	82.85	91.40	100.85	109.06	115.55	
Idea	4.70	5.07	5.55	5.94	6.47	7.37	10.36	10.36	12.44	14.01	16.13	18.67	21.05	24.00	27.19	30.38	34.21	38.89	47.09	51.45	57.61	63.82	68.88	74.21	
Loop Telecom	2.47	2.58	2.63	2.81	2.89	1.34	1.30	1.05	1.06	1.07	1.09	1.15	1.24	1.29	1.38	1.66	1.95	2.16	2.31	2.50	2.65	2.84	2.92	2.98	
Spice	1.50	1.44	1.47	1.49	1.63	1.93	2.05	2.20	2.45	2.73	3.17	3.48	3.80	4.21	4.55	3.60	3.80	4.13							
Tata	0.81	1.09	1.43	2.06	3.68	4.85	10.36	12.38	14.45	16.02	17.33	19.50	21.74	24.33	26.33	29.34	31.76	35.12	37.12	46.80	57.33	65.94	72.53	79.07	
MTNL	0.78	1.08	1.29	1.44	1.65	2.05	2.31	2.43	2.60	2.94	2.81	2.99	3.21	3.53	3.72	3.96	4.19	4.48	4.61	4.68	4.88	5.09	5.21	5.31	
HFCL	0.05	0.05	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.06	0.25	0.30	0.34	0.36	0.38	0.39	0.38	0.38	0.34	0.32	0.66	1.02	
Sistema Shyam	0.03	0.03	0.03	0.03	0.03	0.03	0.06	0.08	0.09	0.10	0.10	0.10	0.10	0.11	0.11	0.12	0.37	0.60	1.19	1.96	3.04	3.77	5.10	6.64	
Aircel		1.76	1.87			2.61	3.20	3.80	4.15	5.51	6.78	8.04	9.43	10.61	11.92	13.88	16.08	18.48	21.80	25.73	31.02	36.86	41.67	46.52	
Uninor																					1.20	4.26	6.02	11.27	
Stel																					0.14	1.00	1.32	1.64	
Etisalat/Allianz																							0.01	0.06	
Videocon																						0.03	1.94	4.48	
Others	1.65				2.28																				
Total	48.01	52.22	57.37	65.07	75.94	90.14	112.15	129.54	149.62	165.11	184.92	209.08	233.63	261.08	286.87	315.31	346.89	391.76	427.29	471.73	525.16	584.27	635.44	687.71	
% Share																									
Bharti	20%	21%	21%	22%	22%	22%	21%	21%	21%	22%	23%	23%	24%	24%	24%	25%	25%	24%	24%	23%	23%	22%	22%	21%	
Reliance	21%	20%	20%	20%	19%	19%	20%	20%	20%	17%	18%	17%	18%	18%	18%	18%	18%	19%	19%	18%	18%	18%	17%	17%	
BSNL	19%	19%	19%	19%	20%	20%	19%	18%	18%	19%	17%	16%	16%	16%	15%	14%	13%	13%	13%	12%	12%	12%	11%	11%	
Vodafone Essar	15%	15%	15%	15%	15%	17%	16%	16%	16%	16%	17%	17%	17%	17%	17%	17%	18%	18%	18%	18%	17%	17%	17%	17%	
Idea	10%	10%	10%	9%	9%	8%	9%	8%	8%	8%	9%	9%	9%	9%	9%	10%	10%	10%	11%	11%	11%	11%	11%	11%	
Tata	2%	2%	2%	3%	5%	5%	9%	10%	10%	10%	9%	9%	9%	9%	9%	9%	9%	9%	9%	10%	11%	11%	11%	11%	
Aircel	0%	3%	3%	0%	0%	3%	3%	3%	3%	3%	4%	4%	4%	4%	4%	4%	5%	5%	5%	5%	6%	6%	7%	7%	
Top 7 players	86.6%	90%	90%	88%	89%	94%	96%	95%	96%	96%	97%	96%	96%	96%	96%	97%	97%	97%	98%	98%	98%	97%	96%	95%	
Others	13.4%	9.9%	9.6%	12.2%	11.2%	6.0%	3.6%	4.6%	4.5%	4.2%	3.4%	3.8%	3.7%	3.6%	3.5%	3.1%	3.1%	3.0%	2.0%	2.0%	2.3%	3.0%	3.6%	4.9%	

Mobile telecom subscriber analysis – Net Additions by operator

	Dec-04	Mar-05	Jun-05	Sep-05	Dec-05	Mar-06	Jun-06	Sep-06	Dec-06	Mar-07	Jun-07	Sep-07	Dec-07	Mar-08	Jun-08	Sep-08	Dec-08	Mar-09	Jun-09	Sep-09	Dec-09	Mar-10	Jun-10	Sep-10	
Net additions																									
Bharti	1.13	1.15	1.28	1.81	2.26	3.25	3.51	3.97	4.91	5.17	5.56	6.17	6.29	6.82	7.40	8.10	8.17	8.27	8.45	8.14	8.35	8.76	9.00	6.67	
Reliance	1.11	0.30	1.20	1.34	1.69	2.63	5.21	3.46	4.00	-1.97	4.90	3.41	4.64	4.83	4.99	5.26	5.30	11.32	6.95	6.50	7.67	8.63	8.39	6.53	
BSNL	0.94	1.00	0.79	1.69	2.45	2.82	3.37	2.68	2.90	4.38	1.07	2.07	2.68	3.98	1.17	1.91	2.36	5.92	2.22	4.40	4.14	6.55	3.24	5.63	
Vodafone Essar	0.81	0.62	0.64	1.27	1.70	3.95	2.18	2.82	2.95	3.13	4.31	4.91	4.21	4.26	5.07	5.43	6.31	7.84	7.68	6.40	8.55	9.45	8.21	6.49	
Idea	0.34	0.37	0.48	0.39	0.53	0.90	2.99	-	2.08	1.57	2.12	2.55	2.38	2.95	3.19	3.19	3.83	4.68	8.20	4.36	6.16	6.21	5.06	5.33	
Loop Telecom (BPL)	0.13	0.11	0.05	0.18	0.08	-1.55	-0.04	-0.25	0.01	0.01	0.02	0.07	0.09	0.06	0.08	0.29	0.28	0.22	0.15	0.19	0.15	0.19	0.08	0.06	
Spice	0.08	-0.06	0.03	0.02	0.14	0.30	0.12	0.15	0.25	0.28	0.44	0.31	0.32	0.41	0.34	-0.95	0.20	0.33	-4.13						
Tata	0.12	0.28	0.34	0.63	1.62	1.17	5.51	2.02	2.07	1.57	1.31	2.17	2.25	2.59	2.00	3.01	2.43	3.36	2.00	9.68	10.53	8.61	6.59	6.54	
MTNL	0.21	0.30	0.21	0.15	0.21	0.40	0.26	0.12	0.17	0.34	-0.13	0.18	0.22	0.32	0.19	0.24	0.23	0.29	0.13	0.07	0.20	0.21	0.12	0.10	
HFCL	0.01	0.00	0.01										0.19	0.05	0.04	0.02	0.02	0.01	-0.01		-0.04	-0.02	0.34	0.36	
Sistema Shyam	0.00	-0.00	0.00				0.03	0.02	0.01	0.01	-0.00	0.00	0.00	0.01	0.00	0.01	0.24	0.23	0.59	0.77	1.08	0.73	1.33	1.54	
Aircel	-1.47	1.76	0.12	-1.87		2.61	0.59	0.60	0.35	1.36	1.27	1.26	1.39	1.18	1.31	1.95	2.20	2.40	3.32	3.93	5.29	5.84	4.81	4.85	
Uninor																					1.20	3.06	1.76	5.25	
Stel																					0.14	0.86	0.32	0.32	
Etisalat/Allianz																							0.01	0.05	
Videocon																							0.03	1.91	2.54
Others	1.65	-1.65			2.28	-2.28																			
Total	5.06	4.16	5.16	5.61	12.96	14.20	23.73	15.59	19.70	15.85	20.86	23.10	24.65	27.45	25.79	28.44	31.58	44.87	35.54	44.44	53.42	59.11	51.17	52.27	

Fixed line telecom subscriber analysis

	Oct-09	Nov-09	Dec-10	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10
Number of subscribers (millions)												
BSNL	28.33	28.21	28.09	27.98	27.9	27.83	27.68	27.19	26.93	26.68	26.45	26.22
MTNL	3.51	3.50	3.49	3.25	3.48	3.49	3.48	3.48	3.48	3.47	3.47	3.47
Tata	1.07	1.08	1.1	1.12	1.13	1.16	1.17	1.18	1.19	1.21	1.22	1.23
Bharti	2.95	2.97	2.99	3.02	3.04	3.06	3.09	3.11	3.15	3.17	3.96	3.22
Reliance	1.16	1.16	1.16	1.17	1.17	1.17	1.18	1.18	1.19	1.19	1.20	1.21
HFCL	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.17	0.18	0.18
Shyam	0.08	0.06	0.05	0.05	0.05	0.04	0.03	0.03	0.03		0.04	0.04
Total	37.27	37.15	37.05	36.76	36.94	36.92	36.80	36.34	36.14	35.89	36.52	35.57
% change												
BSNL		-0.4%	-0.4%	-0.4%	-0.3%	-0.3%	-0.5%	-1.8%	-1.0%	-0.9%	-0.9%	-0.9%
MTNL		-0.3%	-0.3%	-6.9%	7.1%	0.3%	-0.3%	0.0%	0.0%	-0.3%	0.0%	0.1%
Tata		0.9%	1.9%	1.8%	0.9%	2.7%	0.9%	0.9%	0.8%	1.7%	0.8%	1.2%
Bharti		0.7%	0.7%	1.0%	0.7%	0.7%	1.0%	0.6%	1.3%	0.6%	24.9%	-18.8%
Reliance		0.0%	0.0%	0.9%	0.0%	0.0%	0.9%	0.0%	0.8%	0.0%	0.8%	0.5%
HFCL		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	1.7%
Shyam		-25.0%	-16.7%	0.0%	0.0%	-20.0%	-25.0%	0.0%	0.0%	0.0%	20.3%	2.8%
Total		-0.3%	-0.3%	-0.8%	0.5%	-0.1%	-0.3%	-1.3%	-0.6%	-0.6%	1.7%	-2.6%
% share												
BSNL	76.0%	75.9%	75.8%	76.1%	75.5%	75.4%	75.2%	74.8%	74.5%	74.3%	72.4%	73.7%
MTNL	9.4%	9.4%	9.4%	8.8%	9.4%	9.5%	9.5%	9.6%	9.6%	9.7%	9.5%	9.8%
Tata	2.9%	2.9%	3.0%	3.0%	3.1%	3.1%	3.2%	3.2%	3.3%	3.4%	3.3%	3.5%
Bharti	7.9%	8.0%	8.1%	8.2%	8.2%	8.3%	8.4%	8.6%	8.7%	8.8%	10.8%	9.0%
Reliance	3.1%	3.1%	3.1%	3.2%	3.2%	3.2%	3.2%	3.2%	3.3%	3.3%	3.3%	3.4%
HFCL	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%
Shyam	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Internet subscriber analysis – by ISP

	Dec-05	Dec-06	Dec-07	Mar-08	Jun-08	Sep-08	Dec-08	Mar-09	Jun-09	Sep-09	Dec-09	Mar-10	Jun-10
No. of subscribers													
BSNL	2,597,000	3,811,852	4,992,485	5,640,191	5,943,093	6,377,051	6,695,196	7,256,701	7,600,402	8,077,245	8,521,621	9,185,575	9,671,180
MTNL	1,314,000	1,658,000	1,851,291	1,899,747	1,922,713	1,951,851	2,022,973	2,124,228	2,181,663	2,222,191	2,258,284	2,312,829	2,308,706
Sify	877,134	805,940	707,609	576,047	564,790	510,071	475,213	405,254	346,757	287,699	235,383	197,197	162,808
Tata Communications ISL	467,073	457,481	459,430	448,146	434,640	399,478	391,669	367,900	324,089	307,954	289,537	274,224	274,224
Bharti Infotel	313,317	597,665	753,754	815,360	871,256	938,251	1,006,688	1,084,872	1,145,723	1,196,691	1,249,999	1,305,988	1,310,033
Reliance	340,326	540,068	628,832	696,440	824,026	878,252	940,227	935,373	1,037,710	1,090,105	1,163,390	1,223,079	1,317,550
Data Infosys	245,336	102,910	199,854	199,854	199,833	199,819	248,053	248,032	250,437	250,428	250,493	250,491	104,615
YOU Telecom	111,062	134,620	177,810	185,450	193,157	199,352	200,422	198,451	199,193	200,779	259,581	284,926	284,926
Hathway Cable	56,502	108,369	175,671	201,212	247,185	288,142	320,437	339,032	339,032	312,677	307,396	314,088	323,896
HCL Infinet	42,581	41,976	42,490	42,600	42,603	42,367	42,214	42,189	42,151	42,156	42,156	41,827	41,798
Icenet	29,776	27,381	1,490	1,490									
Asianet	26,206	38,765	52,428	55,435	59,761	66,506	71,093	73,382	76,403	81,894	86,130		
HFCL Infotel	20,796	30,700	43,689	46,602	51,985	55,868	60,886	67,894	71,278	74,377	76,985	83,807	80,621
Shyam Internet Services	23,887	25,409	25,465	25,523	27,568	32,681	32,711	32,691	32,749	32,927	14,946	16,647	16,927
Tata Teleservices	24,322	26,338	18,945	22,606	31,079	41,010	46,287	55,328	57,835	65,085	68,959	76,359	79,669
Vodafone Essar Gujrat ltd	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001	18,001
WWW Comms	15,257	15,408	4,155	4,198	6,179	4,535	4,535						
Hughes Escort Comms	12,070	16,937	22,720	24,387	26,782	26,743	26,743	8,950	10,701	11,231		11,439	11,305
Broadband Pacenet	11,237	13,445	12,999	12,470	12,470	12,470	12,470	12,470	22,167	22,167	22,167	21,770	21,770
Spectra Net	7,053	14,763	28,650	31,116	33,078	35,173							
Tikona Digital Networks Pvt Ltd										22,293	22,293	70,283	104,653
Others	150,320	95,702	145,698	150,624	152,379	164,777	239,336	265,321	294,366	331,825	376,424	563,778	692,771
Total	6,703,256	8,581,730	10,363,466	11,097,499	11,662,578	12,242,398	12,855,154	13,536,069	14,050,657	14,625,432	15,241,452	16,182,025	16,720,800



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