

Present Scenario of Telecom Sector in Assam Circle: An Overview

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Abstract

The Telecom Sector of Assam Circle has not only led to rapid growth, but also helped a great deal towards maximization of consumer benefits, as tariff have been falling across the Circle due to the result of unrestricted competition. The Sector has undergone a dramatic transformation after liberalization from Government monopoly to a competitive environment, where multiple private players could enter and provide their services to customers (Department of Telecommunication, Annual Report 2014-15). The sequence of reform measures initiated by the Government of India along with advancement in wireless technology, active participation of private companies and foreign direct investment have all played an important role in phenomenal growth of Indian Telecom Sector including Assam Telecom Circle. It has observed that the Sector is growing every year in the Circle (TRAI Press Release, 2014-15). Moreover, this Sector in Assam Circle has witnessed a continuous rising trend in the total number of people using telephones, especially the wireless segment (Baruah&Baruah, 2015).

In this paper an attempt has been made to study the present scenario (2015-16) of Telecom Sector and examine the growth and development of different Service Providers of the Sector in Assam Circle.

Key words: Telecom Sector, Assam Telecom Circle, Telecom Service Providers.

Introduction

In the financial year 2015-16, the Assam Telecom Circle has viewed a continuous rising trend in total number of people using telephone and hence tele-density (DoT, Annual Report, 2015-16). The tele-density of the Circle has increased from 53.95% at the end of March 2015 to 57.55% at the end of March 2016. Moreover, increased percentage growth of wireless segment in both the Public and Private Telecom Sector has observed in Assam Telecom Circle (TRAI Press Release, 2015 and 2016). However, along with telephone (wireless and wire-line), rapid increase in broadband connectivity has also witnessed recently in the Circle (TRAI Press Release, 2016). It is true that the growth and development of Telecom Sector of a country helps to connect their people with the rest of the globe and thereby contributes extra ordinary achievements in terms of a nation's socio-economic development (Earnst& Young, 2011).

1. Need of the study

According to Tarab (2012) the growth and development of Telecom Sector has a multiplier effects over the entire economy of that place. Further, Joshi (2014) mentioned that the World Bank believes that an increase in Mobile and Broadband penetration increases the per capita Gross domestic product (GDP) by 0.81% and 1.38% respectively in a developing country.

Therefore, necessity was felt to analyze and understand the growth of Telecom Sector in Assam Circle as this Sector emerges as one of the critical components of economic growth required for overall socio-economic development of the State.

2. Objectives of the Study

The objectives of the research study are-

- i. To study the present scenario (2015-16) of Telecom Sector in Assam Circle.
- ii. To examine the growth and development of different Service Providers of Telecom Sector in Assam Circle.

3. Methodology

The study is based on secondary data collected from the Department of Telecommunication (DoT), Telecom Regulatory Authority of India (TRAI), Ministry of Communication, related papers published in various Research journals, the reports from Government of India and other sources. In order to study the specified objectives, statistical tools like year-wise Percentage of market share of different Service Providers, growth rate etc. of different segments was calculated.

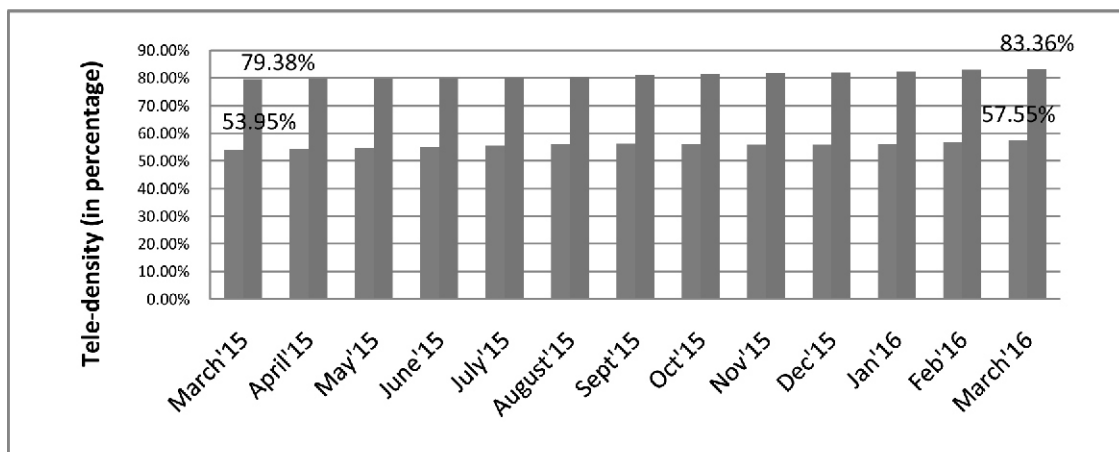
4. Discussion

This study has been drafted to portray the Telecom Sector in Assam Circle in the financial year 2015-16. Here, the researcher has discussed about- Tele-density (wireless & Wire-line) of Assam Circle, Wireless connectivity vs. Wire-line connectivity, Public vs. Private Telecom Sector, different Service Providers that exist in the Circle and their contributions, Subscribers' base and Market share of these Service Providers related to wireless and wire-line segments and their respective market positions, growth of Broadband, Gross revenue and Adjusted gross revenue of Wireless Service Providers etc. in the last financial year (2015-16) in the Circle. It is seen that the Telecom Circle of Assam has registered a phenomenal growth during the last year, propelled largely by the unprecedented growth of the wireless segment and rural telephony, which not only is beneficial for the Telecom Sector but for the overall economic development of the State.

4:1 Tele-density of Assam Telecom Circle in 2015-16

Tele-density represents the number of telephone (wireless and wire-line) per hundred populations. Tele-density in every month of last financial year 2015-16 in Assam Circle been presented in the graph 1 below.

Graph 1: Tele-density of Assam Telecom Circle



Source: Compile data (Department of Telecommunications, Annual Report 2015-16; TRAI, Press Release, Year 2015 and 2016).

From the above graph, a gradual positive growth of tele-density in every month of Assam Telecom Circle in last financial year (2015-16) can be observed. The tele-density of the Circle as on 31st March 2015 was 53.95%, which has increased up to 57.55% on 31st March 2016.

From the graph a similar trend of tele-density of both Assam Circle as well as Indian Telecom Sector can be viewed. Hence, it can be summarized that the Assam Telecom Circle has also witnessed a continuous rising trend in total number of people using telephone along with overall Indian Telecom Sector.

4:2 Public vs. Private

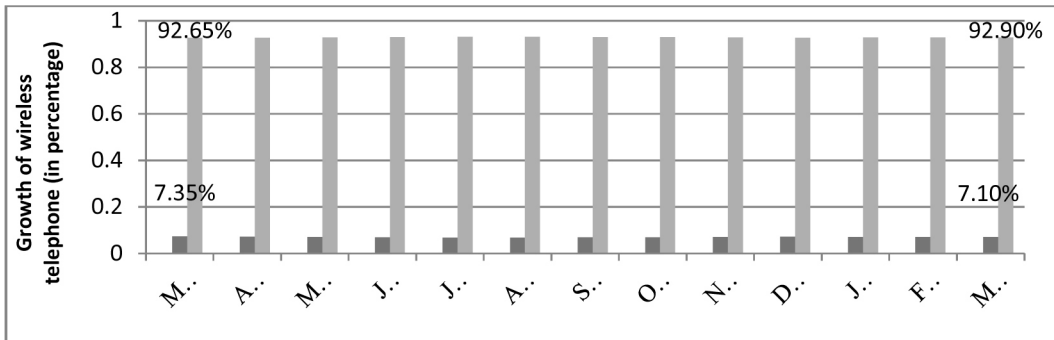
The number of subscribers' base in both Public and Private Telecom Sectors in Assam Circle are increasing, even though this rise is comparatively more in Private Sector.

4:2:1 Wireless Public and Private Sector

There is a continuous rise in the number of wireless telephones of Private Sector operators compare to Public Sector in Assam Telecom Circle presently.

The percentage share growth of wireless telephone in Public and Private Sector for every month in last financial year (2015-16) have presented in the graph 2 below.

Graph 2: Percentage growth of Wireless Public and Private telephone in Assam Circle



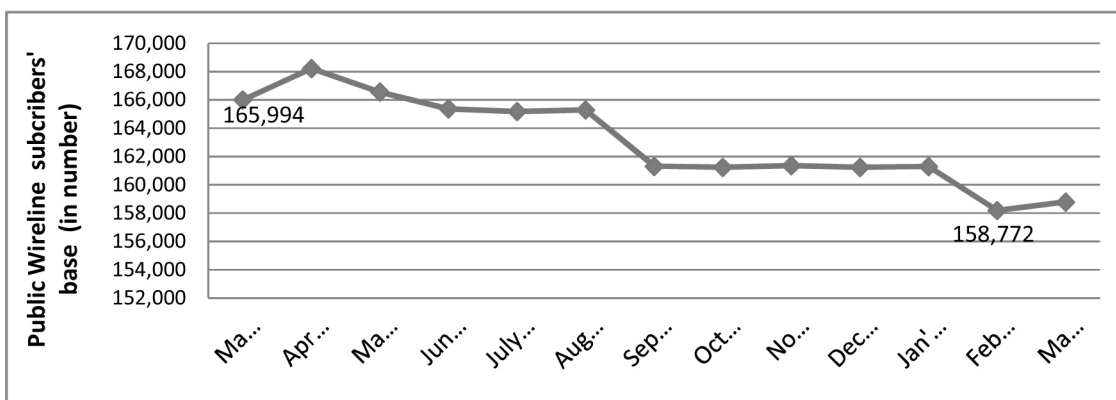
Source: Compile data (Department of Telecommunications, Annual Report 2015-16; TRAI, Press Release, Year 2015 and 2016)

From the above graph 2, it is revealed that the number of wireless telephone connection in Private Sector is increasing day by day, whereas it is gradually decreasing in Public Sector. Therefore, in wireless telephone, Private Sector now dominates the Assam Telecom Circle.

4:2:2 Wire-line Public and Private Sector

However, as long as wire-line telephone is concern, Public Sector dominates till now in Assam Telecom Sector, even though its growth is declining gradually in the Circle. The growth/decline of Public wire-line telephone for every month in the year 2015-16 in Assam Telecom Circle have presented in the graph 3 below.

Graph 3: Growth/decline of Public Wire-line subscribers' base

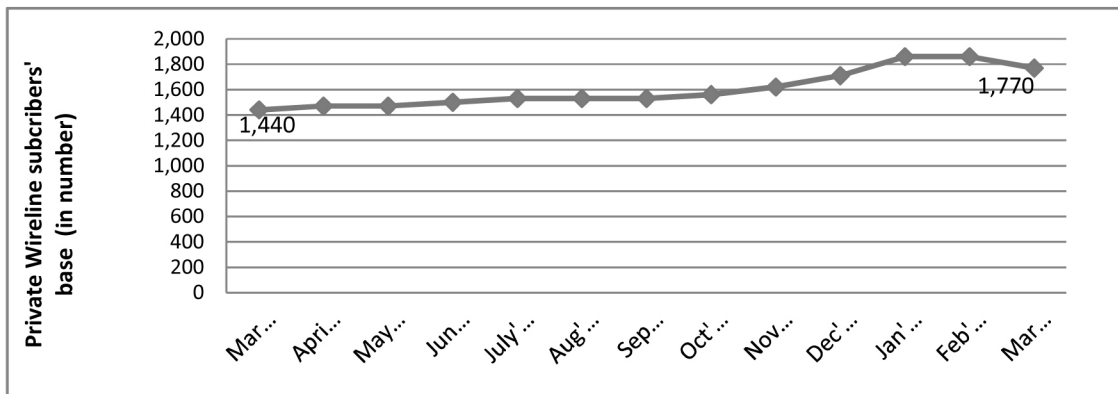


Source: DoT Annual Report, 2014-15 and 2015-16; TRAI Press Release 2015 and 2016

Above graph 3 revealed that even though Public Sector dominates in wire-line telephone in Assam Telecom Circle, but surprisingly the number of Public wire-line telephone is decreasing day by day in last financial year in the Circle.

The growth of Private wire-line telephone for every month in the year 2015-16 have presented in the graph 4 below.

Graph 4: Growth of Private Wire-line subscribers' base



Source: DoT Annual Report, 2014-15 and 2015-16; TRAI Press Release, 2015 and 2016

From the above graph 4, it can be explained that there is a gradual rise in wire-line telephones by Private Sector operators recently in the Circle.

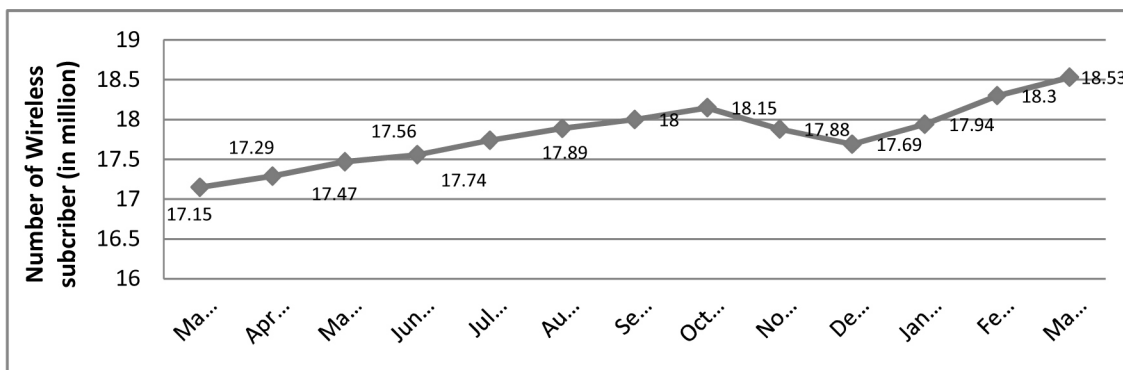
4:3 Wireless vs. Wire-line

In present era of development, people prefer wireless telephone over wire-line telephone. The share of wireless phone has been increasing in every month in the Telecom Sector of India in last financial year 2015-16. Moreover, if compared both the wireless and wire-line, it can be observed that the proportional increase of wireless is much higher than that of wire-line in the year 2015-16.

4:3:1 Wireless growth/ connection

The number of wireless telephone subscribers' base in every month of financial year 2015-16 in Assam Circle have presented in the graph 5 below.

Graph 5: Growth of Wireless subscribers' base in Assam Circle



Source: Compile data (Department of Telecommunications, Annual Report 2015-16; TRAI, Press Release, Year 2015 and 2016).

The wireless subscriber base in Assam Circle has increased to 18.53 million on 31st March 2016 from 17.15 million on 31st March 2015. It reflected that there is a tremendous growth of wireless telephony in the Circle.

Wireless Subscribers' base of service providers in Assam Telecom Circle

The Wireless subscribers' base of Service Providers in Assam Telecom Circle in the year 2015- 2016 have presented in the table 1 below. The many fold growth of wireless subscribers' base can be seen in Assam Circle, out of which Airtel has the maximum subscribers' base today. Vodafone and Idea cellular have a very huge number of subscribers base as on March 2016 compare to their subscribers' base in previous year. The only public Sector player of the circle BSNL (CMTS) is not doing very well in the region. Moreover, subscribers' base of Reliance is also declining day by day.

Table 1: Wireless Subscribers' base of Service Providers in Assam Telecom Circle

Company Name Months	AIRTEL	RELIANCE	VODAFONE	IDEA	AIRCEL	BSNL	TOTAL
March' 15	51,28,549	23,25,258	31,81,129	8,50,910	44,03,721	12,61,324	1,71,50,891
April' 15	52,04,025	23,44,941	31,96,057	8,84,814	44,16,991	12,51,177	1,72,98,005
May' 15	52,37,918	23,60,329	32,25,034	8,97,965	45,00,525	12,48,887	1,74,70,658
June' 15	52,86,302	23,33,948	32,38,050	9,15,022	45,67,562	12,16,102	1,75,56,986
July' 15	53,78,759	23,62,433	32,42,580	9,22,332	46,23,231	12,09,408	1,77,38,743
August' 15	54,11,904	24,06,212	32,62,652	9,31,202	46,59,886	12,22,821	1,78,94,677
September' 15	54,39,363	24,22,860	32,71,682	9,50,180	46,76,910	12,48,183	1,80,09,178
October' 15	54,57,081	24,36,121	32,93,579	9,65,888	47,28,356	12,69,848	1,81,50,873
November' 15	54,61,502	2,00,1270	33,61,391	9,96,478	47,84,443	12,73,904	1,78,78,988
December' 15	56,83,518	13,61,181	34,48,664	10,63,049	48,53,001	12,82,155	1,76,91,568
January' 16	57,87,130	13,04,997	35,08,774	11,10,977	49,44,278	12,86,165	1,79,42,321
February' 16	58,68,703	13,23,923	35,89,406	11,48,252	50,77,054	12,98,631	1,83,05,969
March' 16	59,43,777	13,37,953	36,49,556	11,75,401	51,09,583	13,16,094	1,85,32,364

Source: Compile data (TRAI Press Release, 2015 & 2016)

Market share and Market position of Wireless Service Providers in Assam Telecom Circle

The Market share of Wireless Service Providers along with their market position in Assam Telecom Circle in the year 2015- 2016 is presented in table 2 below.

Table 2: Market share (in percentage) and position of Wireless Service Providers

Month	Market Share	Market Position	Market Share	Market Position	Market Share	Market Position	Market Share	Market Position	Market Share	Market Position	Market Share	Market Position
March'15	29.9	1 st	13.56	4 th	18.55	3 rd	4.96	6 th	25.68	2 nd	7.35	5 th
April'15	30.08		13.56		18.48		5.12		25.53		7.23	
May'15	29.98		13.51		18.46		5.14		25.76		7.15	
June'15	30.11		13.29		18.44		5.21		26.02		6.93	
July'15	30.32		13.32		18.28		5.20		26.06		6.83	
Aug'15	30.24		13.45		18.23		5.20		26.04		6.84	
Sept'15	30.20		13.45		18.17		5.28		25.97		6.93	
Oct'15	30.07		13.42		18.15		5.32		26.05		6.99	
Nov'15	30.55		11.19		18.8		5.57		26.76		7.13	
Dec'15	32.13		7.69		19.49		6.0		27.44		7.25	
Jan'16	32.25		7.27		19.56		6.19		27.56		7.17	
Feb'16	32.06		7.24		19.59		6.28		27.74		7.09	
March'16	32.08		7.22		19.69		6.34		27.57		7.1	

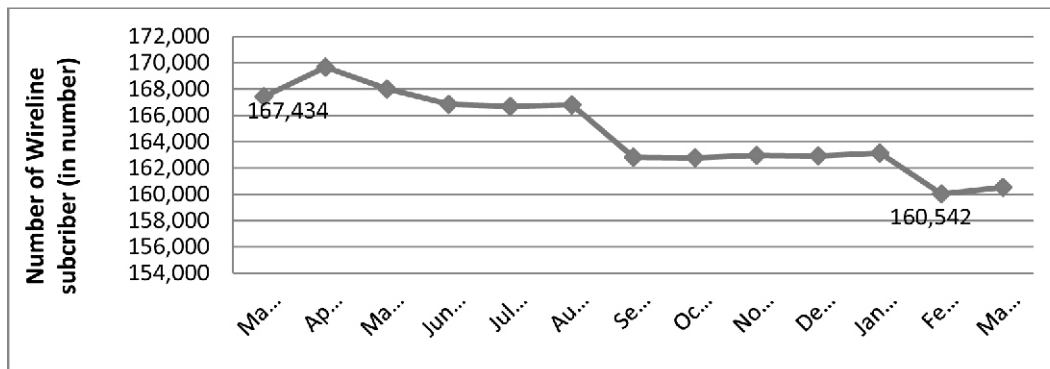
Source: Compile data (TRAI Press Release, 2015 &2016)

From the above table 2, it has been observed that the Wireless Service Providers especially Airtel and Aircel are doing very good and holding 1st and 2nd market positions respectively in Assam Telecom Circle in the year 2015-16.

4:3:1 Wire-line growth/ connection

The number of overall Wire-line telephone (Public and Private Sectors) subscribers’ base in every month of financial year 215-2016 in Assam Telecom Circle have presented in the graph 6 below.

Graph 6: Decline of Wire-line (Public and Private) subscribers’ base in Assam Circle



Source: Compile data (Department of Telecommunications, Annual Report 2015-16; TRAI, Press Release, Year 2015 and 2016).

Surprisingly, the wire-line subscribers’ base in Assam Circle has decreased to 1, 60,542 on 31st March 2016 from 1, 67,434 on 31st March 2015. It reflected that there is a negative growth of overall Wire-line telephony in the Circle.

Wire-line Subscribers' base of Service Providers in Assam Telecom Circle

As long as Wire-line telephone connectivity is concern, only BSNL and Vodafone are giving the services in Assam Telecom Circle presently. The Wire-line subscribers' base of Service Providers in Assam Telecom Circle in the year 2015- 2016 have presented in the table 3 below.

Table 3: Wire-line Subscribers' base of Service Providers in Assam Telecom Circle

Company Name ►	BSNL			VODAFONE		
Months ▼	Subscribers' base	Market share	Position	Subscribers' base	Market share	Position
March' 15	165994	99.14%	1 st	1440	0.86%	2 nd
April' 15	168201	99.13%		1470	0.87%	
May' 15	166548	99.12%		1470	0.88%	
June' 15	165359	99.1%		1500	0.9%	
July' 15	165166	99.08%		1530	0.92%	
August' 15	165278	99.08%		1530	0.92%	
September' 15	161296	99.06%		1530	0.94%	
October' 15	161228	99.04%		1560	0.96%	
November' 15	161345	99.01%		1620	0.99%	
December' 15	161219	98.95%		1710	1.05%	
January' 16	161285	98.86%		1860	1.14%	
February' 16	158178	98.84%		1860	1.16%	
March' 16	158772	98.9%		1770	1.01%	

Source: Compile data (TRAI Press Release, 2015 & 2016)

From the above table 3, it has been observed that BSNL is having the market share of 98.9%, which is very high as compared to the market share of Vodafone 1.1% as on 31st March 2016. Hence, it is reflected that as long as wire-line connectivity is concerned, the only Public Sector Company BSNL has dominated the Assam Telecom Circle.

4:4 Gross Revenue and Adjusted Gross Revenue of Wireless Service Providers in Assam Telecom Circle

Financial data pertaining to Gross Revenue and Adjusted Gross Revenue of Wireless Service Providers for the four quarters of the financial year 2015-16 in Assam Telecom Circle have presented in the table 4 below:

Table 4: Gross Revenue and Adjusted Gross Revenue (in crore)

Company Name ↓	Quarter- I (April-June '15)		Quarter- II (July-Sept' 15)		Quarter-III (Oct-Dec' 15)		Quarter-IV (Jan-March' 16)	
	Gross Revenue	Adjusted Gross Revenue	Gross Revenue	Adjusted Gross Revenue	Gross Revenue	Adjusted Gross Revenue	Gross Revenue	Adjusted Gross Revenue
AIRTEL	308.73	259.81	307.40	258.86	315.10	264.74	334.41	279.50
RELIANCE	87.78	73.07	81.34	58.62	69.37	51.26	43.61	11.71
VODAFONE	162.31	118.53	161.4	113.0	170.7	121.9	197.65	153.76
IDEA	35.63	17.51	36.82	18.46	40.09	20.82	48.25	27.11
AIRCEL	179.71	155.40	175.85	152.43	182.79	159.70	198.92	174.83
BSNL (CMTS)	55.44	50.17	58.70	52.48	54.35	37.84	59.99	55.58

Source: Compile data (TRAI, Financial and Economical Analysis Division 2016)

From the above table 4, it is observed that the total Gross Revenue and Adjusted Gross Revenue of Airtel was maximum and Idea Cellular was minimum in the last financial year 2015-16. However, it is important to mention here that Idea Cellular Limited has started their functioning in Assam Circle recently.

4:5 Broadband Connectivity

The number of Broadband subscribers, base has increased day by day in Assam Telecom Circle. In the year 2015-16, India Government is giving high priority for expanding affordable access to broadband in rural areas also along with urban areas. It has observed that the maximum broadband subscribers are the mobile devices users, followed by wired subscribers and then come other wireless broadband in the Circle (TRAI Press Release 2015-16).

4.6 Mobile Number Portability

As the wireless telephone subscribers can retain their mobile numbers when they relocate from one service area to another, hence number of subscribers' base that submitted their requests for Mobile Number Portability (MNP) have also increased in Assam Telecom Circle. Cumulative MNP requests in every month in the Circle in last financial year (2015-16) have presented in table 5 below:

Table 5: Cumulative numbers of Porting request

Sr.no	Month	Cumulative Number of Porting Requests
1.	March' 15	4,89,915
2.	April' 15	4,97,489
3.	May' 15	5,07,449
4.	June' 15	5,17,827
5.	July' 15	5,30,168
6.	August' 15	5,54,204
7.	September' 15	5,81,457
8.	October' 15	6,16,353
9.	November' 15	6,76,169
10.	December' 15	7,80,543
11.	January' 16	9,15,606
12.	February' 16	9,62,752
13.	March' 16	9,93,987

Source: Compile data (TRAI Press Release, 2015 &2016)

From the above table 5, it has been observed that the number of subscribers registered for Mobile Number Portability (MNP) in Assam Telecom Circle has increased from 4, 89,915 as on March 2015 to 9, 93,987 at the end of March 2016.

4.7 Future Growth Opportunities of Assam Telecom Circle

According to the Department of Telecommunication (DoT Annual Report, 2015-16), the reach of telecom services to all regions of the country has become an integral part of an innovative and technologically-driven society. Moreover, providing mobile coverage to the 8621 uncovered villages in the North-Eastern Region (NER), which included Assam Telecom Circle also, has been included as part of Comprehensive Telecom Development Plan for NER. BSNL also pays special emphasis on development of telecommunication facilities in North-Eastern region including Assam Telecom Circle as well as tribal areas of the region. To serve the nation in its vastness and diversity, modern telecommunication facilities will be facilitated to all remote corners of this country with special focus on underserved areas in backward areas including Assam Circle and other North Eastern Region (DoT Annual Report, 2015-16). Therefore, future growth opportunities of Telecom Sector are there in Assam Circle.

Conclusion

An attempt has been made in this research paper to study the present scenario (2015-16) of Telecom Sector and also to examine the growth and development of different Service Providers of the Sector in Assam Circle. During the study it revealed that the Telecom Sector has been growing continuously in the financial year 2015-16 in the Circle as the Government's policies related to this Sector are very encouraging.

The study has also analysed the preferences opted by the various telephone subscribers' irrespective of being urban or rural and observed a growth of wireless subscribers. Private Service Providers proved to be the favourites for the wireless consumers and Public Service Provider (BSNL) is the preferred wire-line consumer in the Circle. Moreover, a tremendous growth has been observed in all facets of Telecom services in the financial year 2015-16 in the Circle. From the above study it can be concluded that the Telecom Sector of Assam Circle has grown in the year 2015-16, and it is likely to continue growing in the future also.

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