



Final Report - West Zone (Mumbai)

Assessment of (i) implementation and effectiveness of various regulations, directions and orders issued by TRAI in the interest of consumers and (ii) Customer Perception of Telecom Service Through Surveys
June 2015

Telecom Regulatory Authority of India (TRAI)



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Telecom Regulatory Authority of India (TRAI)

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Preface

Telecom Regulatory Authority of India, vide the Standards of Quality of Service of Basic Telephone Service (Wireline) and Cellular Mobile Telephone Service Regulations, 2009 (7 of 2009) dated the 20th March, 2009, published in the Gazette of India Extraordinary Part-III Section 4 dated 23rd March, 2009, has laid down the 'Quality of Service' parameters applicable to the Basic telephone service (Wireline) and cellular mobile telephone service. These regulations are applicable to all the Basic Service Operators/ Unified Access Service Providers and Cellular Mobile Telephone Service providers, including BSNL and MTNL.

Regulation No. 7 of the Standards of Quality of Service of Basic Telephone Service (Wireline) and Cellular Mobile Telephone Service Regulations, 2009 (7 of 2009) dated 20th March, 2009 and Sl. No. (ix) Under regulation 3 of Quality of Service of Broadband Service Regulations, 2006 (11 of 2006) dated the 6th October 2006, have laid down the benchmarks for the parameter on customer perception of service to be achieved by service providers. The customer perception of service is to be assessed through customer satisfaction survey.

Telecom Regulatory Authority of India (TRAI) vide letter 304-10/2014-QoS dated 28th May 2014 has given a provisional extension to Mott MacDonald to carry out assessment of

Implementation and effectiveness of various regulations, directions and orders issued by TRAI

Telecom Regulatory Authority of India had from time to time issued a number of regulations, directions and orders in the interest of the consumers. The survey has assessed the implementation and effectiveness of these regulations, directions and orders, the details of which are as under

- The Telecom Commercial Communications Customer Preference Regulations, 2010
- Quality Of Service Of Broadband Service Regulations, 2006
- Telecom Consumers Protection Regulations, 2012
- Telecom Consumers Complaint Redressal Regulations, 2012
- The Standards Of Quality Of Service Of Basic Telephone Service (Wire-line) And Cellular Mobile Telephone Service Regulations, 2009
- Telecommunication Mobile Number Portability Per Port Transaction Charge And Dipping Charge Regulations, 2009

Customer perception of service provider

- The basic objective of the consumer perception survey was to gauge the subscriber feedback on Quality of Services by way of primary survey and comparing them with quality of service benchmarks stipulated by Telecom Regulatory Authority of India.
- The West Zone comprises of 4 Circles – Gujarat, Madhya Pradesh / Chhattisgarh, Mumbai, Maharashtra / Goa (excluding Mumbai). This report presents the results of the survey conducted for the Mumbai Circle.

Executive Summary

Mumbai: Circles & Coverage Areas

In the second phase of the survey, Mott MacDonald had to cover the below mentioned circles and regions.* The selection of the circles and particularly regions has been done on the basis of several parameters including importance of districts in the states, urban/ rural demographics as well as the terms and conditions stipulated in the tender document and in consultation with TRAI.

Circles & Coverage Area

Circle	Regions for Cellular*	Regions for Basic Wire-Line	Regions for Broadband
Rest of Maharashtra & Goa	Pune	SDCAs and Exchanges will be selected as per the methodology defined in the RFP after receipt of lists of SDCAs and Exchanges from the service providers. The selection will be predominantly in and around the districts selected for the cellular service	POPs will be selected as per the methodology defined in the RFP after receipt of lists of POPs from the service providers. The selection will be predominantly in and around the districts selected for the cellular service
	Nashik		
	Aurangabad		
	Goa		
Mumbai	Mumbai		
	Navi Mumbai		
	Thane		

Mumbai: Sample Design

The sample design for the ongoing survey in line with the scope of work is as follows

Sample Mix & Mode of Survey

Service Category	Sampling Methodology	Mode of Survey
Basic Telephone Service	The sample for basic telephone service would be evenly spread in 5% of the exchanges of each Basic Service Operator (BSO). These 5% of the exchanges shall be evenly spread over 10% of the Short Distance Charge Areas (SDCAs) with each BSO. Wherever possible, 30% of the exchanges shall be rural.	Rural - 100 % face to face Urban - 50% face to face, 50% Telephonic
Cellular Mobile	The sample for the cellular telephone service subscribers shall be evenly spread over in 10% of the district headquarters of a service area. The sample must have at least 30 % of the customers from rural areas.	Rural - 100 % in-person Urban - 50% in-person, 50% Telephonic
Broadband	The sample for the broadband service subscribers shall be evenly spread over in areas served by 10% of the points of presence (POPs) of each service providers. Wherever possible the sample shall have 30% of the customers from the rural area.	Rural - 100 % in-person Urban - 50% in-person, 50% Telephonic / Online

Mumbai Circle: Comparisons with Quality of Service Benchmarks

The performance compliance of the various service providers is as given below

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Mumbai: Basic Wire-Line

Performance Compliance-Basic-Wire line Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	≥90%	97%	98%	94%	97%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	NA	NA	NA	NA
Customer Satisfied With Billing Performance – Post-Paid	≥95%	98%	97%	94%	95%
Customer Satisfied With Help Services	≥90%	92%	87%	88%	93%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	94%	94%	92%	96%
Customer Satisfied With Maintainability	≥95%	95%	83%	86%	93%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	89%	88%	83%	96%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	91%	90%	91%	95%
		>= Benchmark			

Quality of Service Benchmarks

- The survey results show that all service providers have met the quality of service benchmarks for the provision of service, billing performance and Overall Quality parameters. While in case of the other parameters, few of the service providers could not to meet the benchmarks. In many cases service providers have marginally missed to achieve the benchmark.
- Help services is the only parameter wherein few service providers have failed to achieve the stipulated benchmark. Airtel has achieved the benchmark followed by Tata, MTNL and Reliance with percentile more than 90% of the customers expressing satisfaction on the parameter.
- Airtel has registered the highest satisfaction level on the overall quality of service benchmark with around 93% of the consumers being satisfied on the parameter. All other service providers have been able to achieve the satisfaction level near the benchmark level of satisfaction i.e. 90%.
- Based on the qualitative inputs from field staff and general observation during the survey period the consultants have observed that the satisfaction levels for the Supplementary Services and Value Added Services parameter are a bit lower as compared to satisfaction percentiles for other parameters.

Assessment of Various Regulations

- The level of satisfaction with the effectiveness of blocking of unsolicited commercial calls/SMSs is moderate across all service providers. Airtel, Tata and MTNL have registered satisfaction level more than 80% while Reliance has a low satisfaction level of 78% on the parameter.
- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number with around 97% of the consumers being aware of it. Few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal.

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Mumbai: Cellular Mobile

Performance Compliance-Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Customer Satisfied With Provision of Service	≥90%	94%	95%	93%	93%	97%	96%	93%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	95%	96%	95%	95%	98%	97%	96%
Customer Satisfied With Billing Performance – Post-Paid	≥95%	93%	98%	91%	91%	90%	92%	91%
Customer Satisfied With Help Services	≥90%	93%	93%	91%	94%	93%	93%	92%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	87%	90%	90%	92%	96%	92%	90%
Customer Satisfied With Maintainability	≥95%	93%	95%	87%	95%	94%	93%	93%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	86%	94%	91%	87%	90%	92%	87%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	91%	92%	91%	93%	94%	91%	90%
		≥ Benchmark						

Quality of Service Benchmarks

- The survey results show that all service providers have met the quality of service benchmarks for the provision of service, Billing Performance-Pre-Paid, Help services and Overall Quality parameter. While in case of the other parameters, few of the service providers could not to meet the benchmarks. In many cases service providers have marginally missed to reach the benchmark.
- The satisfaction levels for the Help Services parameter have been by all service providers with highest level of satisfaction in case of Idea and the lowest being 91% in case of Reliance.
- Few service providers have marginally missed the benchmark in case of satisfaction with respect to Mobile Data / Internet Services.
- The service providers have performed well in cases of rest of the benchmarks such as Billing Performance: Post-Paid and Network with most of the service providers achieving or nearing the benchmark on these parameters.
- Based on the qualitative inputs from field staff and general observation during the survey period the consultants have observed that the satisfaction levels for the Supplementary services and Value Added Services by all service providers with highest level of satisfaction in case of Tata and the lowest being 86% in case of MTNL.

Assessment of Various Regulations

- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number with around 97% of the consumers being aware of it. Few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal.

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- The level of satisfaction with the effectiveness of blocking of unsolicited commercial calls is well achieved across all service providers with the satisfaction percentiles in the range of 87-97% for all the service providers.
- Very few pre-paid customers (less than 2%) have requested for an item-wise usage bill for their connection. Based on the qualitative inputs from field staff the consultants have observed that the awareness amongst the pre-paid customer with reference to this option with them in the range of 70-87%.

Mumbai: Broadband

Performance Compliance-Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indus land Media	MTNL	You Broadband	Spectra net	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pace net	D-Vois	Home Systems Private Limited	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network Association	Smart Link	Vasai Cable
Customers satisfied with the provision of service	>90%	94%	94%	95%	96%	96%	95%	95%	98%	95%	97%	97%	97%	91%	92%	91%	96%	94%	93%	95%
Customers satisfied with the billing performance: Pre-Paid	>90%	91%	-	94%	-	97%	-	-	95%	-	-	96%	94%	92%	94%	-	94%	92%	90%	92%
Customers satisfied with the billing performance: Post-Paid	>90%	91%	91%	-	94%	-	95%	94%	-	91%	97%	-	-	-	-	96%	-	-	-	-
Customers satisfied with help services	>90%	85%	88%	88%	88%	88%	70%	89%	89%	87%	95%	89%	90%	87%	86%	88%	88%	90%	87%	89%
Customers satisfied with network performance, reliability and availability	>85%	84%	83%	84%	85%	84%	85%	84%	85%	84%	91%	88%	85%	83%	81%	84%	84%	84%	82%	84%
Customers satisfied with maintainability	>85%	86%	84%	85%	88%	83%	81%	83%	82%	84%	92%	87%	85%	83%	82%	80%	83%	83%	84%	84%
Customers satisfied with supplementary services	>85%	77%	-	-	85%	83%	79%	80%	81%	80%	83%	88%	88%	-	86%	-	-	-	86%	86%
Overall Customer Satisfaction	>85%	88%	86%	86%	87%	87%	86%	89%	89%	88%	91%	88%	89%	88%	89%	87%	86%	88%	88%	87%
			>= Benchmark																	

Quality of Service Benchmarks

- MTNL, Bharti Airtel, Broadband Pacenet, D-Vois have achieved the benchmarks for all the parameters in the broadband category except one of the services. All the service providers have met the benchmarks for the provision of service parameter while in the other parameter few of the service providers have missed the benchmark marginally. Few service providers have marginally missed the benchmark on many parameters.
- The satisfaction levels for the Help Services and Supplementary Services are comparatively lower as compared to other parameters. Bharti Airtel, D-Vois, DNA have met the benchmark for the help service parameter while the rest have satisfaction percentiles in the range of 70-89%. However all service providers have met the Overall Customer Satisfaction benchmark of 85%.

Assessment of Various Regulations

- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number with around 97% of the consumers being aware of it. Very few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal and efforts should be made in generating awareness with respect to Appellate Authority and Web Based Monitoring System.
- The levels of customers being satisfied with the manner in which their complaint with the toll free consumer care number was addressed is moderate with most of the service providers having satisfaction levels in the range of 68-89%.
- Customer satisfaction levels with respect to the information provided by the service provider under the fair usage policy (FUP) and the facility to measure the broadband connection speed provided by the service provider is more than 80% in case of all the service providers.

Part – A: QoS Benchmark & Assessment of Regulation

1 Introduction

Telecom Regulatory Authority of India, vide the Standards of Quality of Service of Basic Telephone Service (Wireline) and Cellular Mobile Telephone Service Regulations, 2009 (7 of 2009) dated the 20th March, 2009, published in the Gazette of India Extraordinary Part-III Section 4 dated 23rd March, 2009, has laid down the 'Quality of Service' parameters applicable to the Basic telephone service (Wireline) and cellular mobile telephone service. These regulations are applicable to all the Basic Service Operators/ Unified Access Service Providers and Cellular Mobile Telephone Service providers, including MTNL and MTNL

Regulation No. 7 of the Standards of Quality of Service of Basic Telephone Service (Wireline) and Cellular Mobile Telephone Service Regulations, 2009 (7 of 2009) dated 20th March, 2009 and Sl. No. (ix) under regulation 3 of Quality of Service of Broadband Service Regulations, 2006 (11 of 2006) dated the 6th October 2006, have laid down the benchmarks for the parameter on customer perception of service to be achieved by service providers. The customer perception of service is to be assessed through customer satisfaction survey.

Telecom Regulatory Authority of India (TRAI) vide letter 304-10/2014-QoS dated 28th May 2014 has given a provisional extension to Mott MacDonald to carry out

- Assessment of implementation and effectiveness of various regulations, directions and orders issued by TRAI.

Telecom Regulatory Authority of India had from time to time issued a number of regulations, directions and orders in the interest of the consumers. The survey has assessed the implementation and effectiveness of these regulations, directions and orders, the details of which are as under

- The Telecom Commercial Communications Customer Preference Regulations, 2010
 - Quality Of Service Of Broadband Service Regulations, 2006
 - Telecom Consumers Protection Regulations, 2012
 - Telecom Consumers Complaint Redressal Regulations, 2012
 - The Standards Of Quality Of Service Of Basic Telephone Service (Wire-line) And Cellular Mobile Telephone Service Regulations, 2009
 - Telecommunication Mobile Number Portability Per Port Transaction Charge And Dipping Charge Regulations, 2009
- Customer perception of service provider through surveys in West Zone. The West Zone comprises of 4 Circles – Mumbai, Madhya Pradesh / Chhattisgarh, Mumbai, Maharashtra / Goa (excluding Mumbai).
 - The basic objective of the consumer perception survey was to gauge the subscriber feedback on Quality of Services by way of primary survey and comparing them with quality of service benchmarks stipulated by Telecom Regulatory Authority of India (TRAI).

1.1 Circles & Coverage Areas

In the second phase of the survey, Mott MacDonald had to cover the below mentioned circles and regions.* The selection of the circles and particularly regions has been done on the basis of several

parameters including importance of districts in the states, urban/ rural demographics as well as the terms and conditions stipulated in the tender document and in consultation with TRAI.

Table 1.1: Circles & Coverage Area

Circle	Regions for Cellular*	Regions for Basic Wire-Line	Regions for Broadband
Mumbai & Goa	Pune	SDCAs and Exchanges will be selected as per the methodology defined in the RFP after receipt of lists of SDCAs and Exchanges from the service providers. The selection will be predominantly in and around the districts selected for the cellular service	POPs will be selected as per the methodology defined in the RFP after receipt of lists of POPs from the service providers. The selection will be predominantly in and around the districts selected for the cellular service
	Nashik		
	Aurangabad		
	Goa		
Mumbai	Mumbai	SDCAs and Exchanges will be selected as per the methodology defined in the RFP after receipt of lists of SDCAs and Exchanges from the service providers. The selection will be predominantly in and around the districts selected for the cellular service	POPs will be selected as per the methodology defined in the RFP after receipt of lists of POPs from the service providers. The selection will be predominantly in and around the districts selected for the cellular service
	Navi Mumbai		
	Thane		

1.2 Sample Design

The sample design for the ongoing survey in line with the scope of work is as follows

Table 1.2: Sample Mix & Mode of Survey

Service Category	Sampling Methodology	Mode of Survey
Basic Telephone Service	The sample for basic telephone service would be evenly spread in 5% of the exchanges of each Basic Service Operator (BSO). These 5% of the exchanges shall be evenly spread over 10% of the Short Distance Charge Areas (SDCAs) with each BSO. Wherever possible, 30% of the exchanges shall be rural.	Rural - 100 % face to face Urban - 50% face to face, 50% Telephonic
Cellular Mobile	The sample for the cellular telephone service subscribers shall be evenly spread over in 10% of the district headquarters of a service area. The sample must have at least 30 % of the customers from rural areas.	Rural - 100 % in-person Urban - 50% in-person, 50% Telephonic
Broadband	The sample for the broadband service subscribers shall be evenly spread over in areas served by 10% of the points of presence (POPs) of each service providers. Wherever possible the sample shall have 30% of the customers from the rural area.	Rural - 100 % in-person Urban - 50% in-person, 50% Telephonic / Online

The consultants had covered the Rest of Maharashtra (incl. Goa) and Mumbai circles in the second half yearly period. In the first half yearly period the consultants had to covered Gujarat and Madhya Pradesh & Chhattisgarh circles. This report presents the results of the survey conducted for the Mumbai Circle.

2 Objective of the Study

The basic objectives of the study as per the Terms of Reference are as follows

- (i) Assess customer perception of telecom services
- (ii) Assess implementation and effectiveness of various regulations, directions and orders issued by TRAI in the interest of consumers

2.1 Assessment of customer perception of telecom services

The parameters and benchmarks relating to customer perception of service for Basic Telephone Service (wire-line), Cellular Mobile Telephone Services and Broadband Service are provided in the Standards of Quality of service of Basic Telephone Service (wire-line) and Cellular Mobile Telephone Service Regulations, 2009 and Quality of Service of Broadband Service Regulations, 2006.

The parameters and benchmarks for Basic Telephone Service (wire-line), Cellular Mobile Telephone Service and Broadband services as defined in the above mentioned regulations are as below:

Table 2.1: Parameters and Benchmarks Telecom Services

Sr. No.	Parameter	Basic Tele Service	Cellular Service	Broadband Service
1	Customers satisfied with the provision of service	≥90%	≥90%	>90%
2	Customers satisfied with the billing performance	≥95%	≥95%	>90%
3	Customers satisfied with network performance, reliability and availability	≥95%	≥95%	>85%
4	Customers satisfied with maintainability	≥95%	≥95%	>85%
5	Customers satisfied with supplementary and value added services	≥90%	≥90%	>85%
6	Customers satisfied with help services including customer grievance redressal	≥90%	≥90%	>90%
7	Customers satisfied with overall service quality	≥90%	≥90%	>85%

The survey intended to check the compliance of these benchmarks on several parameters by the service providers.

2.2 Assessment of implementation and effectiveness of various regulations, directions and orders issued by TRAI in the interest of consumers

Telecom Regulatory Authority of India had from time to time issued a number of regulations, directions and orders in the interest of the consumers. The survey intended to assess the implementation and effectiveness of these regulations, directions and orders, the details of which are as under

- The Telecom Commercial Communications Customer Preference Regulations, 2010
- Quality Of Service Of Broadband Service Regulations, 2006
- Telecom Consumers Protection Regulations, 2012
- Telecom Consumers Complaint Redressal Regulations, 2012
- The Standards Of Quality Of Service Of Basic Telephone Service (Wireline) And Cellular Mobile Telephone Service Regulations, 2009
- Telecommunication Mobile Number Portability Per Port Transaction Charge And Dipping Charge Regulations, 2009

3 Methodology

3.1 Questionnaire Design Methodology

TRAI via its Terms of Reference as stated in the tender document had given basic guidelines for the preparation of an appropriate research tool for the current study. Subsequently, the need for a scientific service quality model as a basis for the proposed study was discussed at length. The questionnaire has been designed on the basis of the objectives of the overall study and on the proposed service quality model used for the current study

3.1.1 Service Quality Model

Parasuraman et al, (1988) had presented a model known as SERVQUAL to measure quality in the service sector. They introduced two broad dimension assurance and empathy making a fivefold model (tangibles, reliability, responsiveness, assurance and empathy) which they used as the basis for their service quality measurement tool, SERVQUAL. These dimensions can be defined as:

- **Tangibility:** Physical facilities, equipment and appearance of service firm's employees.
- **Reliability:** Performing the promised services at stated level.
- **Responsiveness:** Providing prompt services and willingness to help customers.
- **Assurance:** Knowledge and courtesy of employees and their ability to inspire trust and confidence in the firm.
- **Empathy:** Caring and personalized attention to its customers.

They suggested that the service quality should be measured as the difference or gap between consumer expectations about the service and the actual perceived performance (i.e. the disconfirmation paradigm). The concept of measuring level of service quality in terms of expectations and perceptions using SERVQUAL gap score has been proved very useful. Parasuraman, argued that SERVQUAL can be used in any kind of service industry after some industry specific modification.

After SERVQUAL, presented by Parasuraman, much of the criticism levied against it. For example, Carman argued that the five dimensions of SERVQUAL could not be generic measure for every service industry. He found that some of the items loaded differently when compared to cross industry analysis. As mentioned earlier, Parasuraman combined understanding and access component into single component i.e. empathy due to high correlation count between them. Carman finds it inappropriate combination in his research. Cronin and Taylor also criticized the SERVQUAL model due to its operational deficiencies. They argued that only perception portion can best describe the satisfaction level of customers as compared to difference score of perception minus expectations. As a result, they developed an alternative measurement tool named 'SERVPERF' in which they nullify the expectation portion of the original SERVQUAL model. They argued that only the performance dimension can better predict the behavioural intention of the customers.

In the present study, 30% of the sample had to be covered from the rural area. The rural consumers are not at the same level of awareness with the urban consumers. For them understanding of expectation with the service may not be at the same level as urban consumers. Secondly, in the urban area 50% of the survey had to be administered through telephonic interviews. Administering of SERVQUAL instrument would require a longer duration of time which might not have been feasible

through telephonic interview. Keeping these concerns in mind, SERVPERF model had been used, wherein only performance based perception had to be taken in to account.

In line with the TRAI regulations, three more dimensions were included, namely, Network/technical quality, Economy and Convenience, in addition to the five dimensions (tangibles, reliability, responsiveness, assurance and empathy) used in the SERVQUAL and SERVPERF models. These three dimensions can be defined as

- **Network/technical quality:** Network availability, reliability and performance
- **Economy:** How economical is the use of mobile/broadband/basic wire line service
- **Convenience:** Ease of approaching the service provider for any particular service

The dimensions and the corresponding variables to be covered in the study are shown in the table below.

Table 3.1: Dimensions and Variables Used in the Study

Code	Variables	Parameter
Tangibility (TA)		
TA 1	Availability of suitable plans	Service Provision
TA 2	Provision of information on SIM Card, recharge cards etc.	Service Provision
TA 3	Provision of visually attractive material – starter pack, reload card	Service Provision
TA 4	Provision of variety of entertainment facility – apps etc.	Supplementary services
Reliability (RL)		
RL 1	Provision of service accuracy and dependable	Billing
RL 2	Transparent & Accuracy of bill/ charges	Billing
RL 3	Customer friendly staff	Help services
Responsiveness (RS)		
RS 1	Provision of timely service	Service Provision
RS 2	Effective handling of downtime (maintaining a service)	Maintainability
RS 3	Prompt handling of complaint	Grievance redress
RS 4	Effective grievance redressal mechanism, customer service	Grievance redress
Assurance (AS)		
AS 1	Competency of the staff/ services/ problem solving ability	Help services
AS 2	Feedback mechanism	Grievance redress
Convenience (CV)		
CV 1	Ease of access to Customer help line numbers	Help services
CV 2	Ease of activating & deactivating any service (VAS)/ any other	Supplementary services
CV 3	Ease of registering for unwanted calls/ SMS	Supplementary services
Empathy (EM)		
EM 1	Provision of service manual, complete tariff plan at the time of subscription	Service Provision
EM 2	Having convenient periods and terms for activation, recharge and account suspension , free call times	Billing
EM 3	Ease of taking a connection	Service Provision
EM 4	Ease of recharging process (pre-paid)	Billing
EM 5	24 x 7 customer care service	Help services

Code	Variables	Parameter
Network/ Technical Quality (NT)		
NT 1	Availability of signal in your area (cell)/ working phone(basic)/ uptime (broadband)	Network Performance
NT 2	Ability to make and receive call / uninterrupted	Network Performance
NT 3	Clear Voice quality	Network Performance
Economy (EC)		
EC 1	Availability of recharging cards in various denomination	Billing
EC 2	Economical call charges per minute/ second	Billing
Total variables = 26		

3.1.2 Questionnaire Design

In line with the objectives of the study and based on the selected service quality model the questionnaire has been divided into three major portions as under

- **Customer Details** including name, gender, age, occupation, address, service provider, user type and usage type to build a basic profile of the surveyed customer.
- **Performance Perception of Attributes Related To Service Quality Parameters** which includes drawing inputs on the attributes related to quality parameters as stated in “**The Standards of Quality of Service of Basic Telephone Service (Wire-line) and Cellular Mobile Telephone Service Regulations, 2009**” and “**Quality of Service of Broadband Service Regulations, 2006**”.
- **Implementation and Effectiveness of various Regulations and Directions issued by TRAI** which includes assessment of implementation and effectiveness of various regulations specified as under
 - ✓ The Telecom Commercial Communications Customer Preference Regulations, 2010.
 - ✓ Telecom Consumers Protection Regulations, 2012.
 - ✓ Telecom Consumers Complaint Redressal Regulations, 2012.
 - ✓ Telecommunication Mobile Number Portability per Port Transaction Charge and Dipping Charge Regulations, 2009.

The questions except for those pertaining to contact details of the respondent were closed ended questions. The questions were basically of two types as under

- **Dichotomous Questions** (Yes or No) which were intended to address the research question or were meant to filter responses to subsequent questions
- **Rating Questions** (Scale of 1 to 7 wherein 1 stood for “Extremely Dissatisfied” and 7 stood for “Extremely Satisfied”) which were intended to fetch the satisfaction level on specific service attributes related to quality of service parameters.

3.2 Analysis Methodology

TRAI has clearly laid down its benchmarks on broad parameters for Basic Service (Wireline), Cellular Mobile and Broadband services. In the case of Basic Service (Wireline) and Basic (Wireless) & Cellular Mobile services, benchmark on satisfaction parameters such as provision of services, supplementary/ value added services, help services and overall service quality has been fixed at $\geq 90\%$ and for other parameters such as network performance, maintainability and billing at $\geq 95\%$. Whereas, in the case of Broadband services, the benchmarks on three parameters – provision of services, billing performance

and help services – has been fixed at $\geq 90\%$. In the case of other four parameters – network performance, maintainability, overall satisfaction and supplementary services – the benchmark has been set at $\geq 85\%$.

Therefore, comparisons with benchmark set up by the TRAI on various parameters for Basic, Cellular and Broadband services has been contrasted with the achieved level of percentage of satisfied consumers by various services providers of Basic, Cellular and Broadband services on the TRAI identified service parameters.

The scale suggested measures the satisfaction and dissatisfaction level of consumers. Hence when calculating the satisfaction scores; we consider the percentage of consumers actually satisfied with the service providers. Either of the following 2 approaches was considered to measure the satisfaction scores-

- Option 1: Computation based on Active Satisfaction: Score of Top 3 boxes in the 7 point scale (where 1 = “Extremely dissatisfied” and 7= “Extremely Satisfied”) are calculated to measure the satisfaction score
- Option 2: Computation based on Non- Active Dissatisfaction: Here, Top 4 box scores are taken into account thereby not considering the respondents who are actively dissatisfied with the services. The neutral score of 4 is therefore considered as not dissatisfied.
- Option 1 i.e. ‘Computation based on Active Satisfaction’ has been used for the comparison with benchmarks for the current study.

3.3 Sampling Methodology

As per the TOR the sample for Basic Telephone Service (wireline) subscribers had to be evenly spread over in 5% (five per cent) of the exchanges of each BSOs in the circle. The above stated 5% (five per cent) exchanges had to be evenly spread over 10% (ten per cent) of SDCAs with each BSO. The 5% (five per cent) exchanges had to be covered both in urban and rural category. Wherever possible, at least 30% of these exchanges had to be rural exchanges.

As per the TOR the sample for cellular mobile telephone service subscribers had to be evenly spread over 10% (ten per cent) of district headquarters of a service area where the services are commissioned. The sample had to also cover surrounding areas of the district headquarters, including rural areas and at least the sample size should have 30% customers from rural areas.

As per the TOR the sample for broadband service subscribers had to be evenly spread over the areas served by 10% (ten per cent) of the Points of Presence (POPs) of each service provider in each service area. Wherever possible, the sample size should have 30% customers from rural areas.

The consultants have conducted the survey in the below mentioned regions in the Mumbai Circle as per the sample design submitted by IMM and subsequently approved by TRAI.

Table 3.2: Sample Size Distribution

Circle	Number of Districts	Basic Wire-Line / Cellular / Broadband Districts		
		Mumbai	Thane	Navi Mumbai
Mumbai	1			

3.4 Mode of Conducting Survey

The mode of survey as stated in the terms of reference has been followed by the consultants. The details of the same is as under

- **Basic Telephone Service:** For rural sample 100% of the observations are based on personal interview. For urban sample 50% of the observations are based on personal interview whereas the rest 50% observations are based on Telephonic Interviews.
- **Cellular Service:** For rural sample 100% of the observations are based on personal interview. For urban sample 50% of the observations are based on personal interview whereas the rest 50% observations are based on Telephonic Interviews.
- **Broadband Service:** For rural sample 100% of the observations are based on personal interview. For urban sample 50% of the observations are based on personal interview whereas the rest 50% observations are based on e-mail/telephonic interviews or by developing web based applications.

3.5 Sample Size

The sample size to be considered for the present study has been given in the terms of reference. The consultants have followed the sample plan as given in the TOR except for few isolated cases wherein the sample size could not be achieved due to limited subscriber base of the service providers. The service category-wise sample plan as per TOR and achieved sample is as given in the tables below.

Table 3.3: Basic Wire-Line Sample Size

Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Mumbai	MTNL	1067	1067
Mumbai	Tata	1067	1067
Mumbai	Reliance	1067	767*
Mumbai	Bharti Airtel	1067	1067
TOTAL		4268	3968

* After the best endeavours of the consultant, due to limited number of subscribers, the consultant was able to achieve 767 samples.

Table 3.4: Cellular Sample Size

Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Mumbai	MTNL	1067	1067
Mumbai	Tata	1067	1067
Mumbai	Reliance	1067	1067
Mumbai	Idea	1067	1067
Mumbai	Vodafone	1067	1067
Mumbai	Bharti Airtel	1067	1067
Mumbai	Aircel	1067	1067
TOTAL		7469	7469

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Table 3.5: Broadband Services Sample Size

Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Mumbai	Bharti Airtel	1067	1067
Mumbai	Broadband Pacenet	1067	1067
Mumbai	Digital Network	1067	1067
Mumbai	D-Vois	1067	1067
Mumbai	Five Network	1067	1067
Mumbai	Hathway	1067	1067
Mumbai	Reliance	1067	451*
Mumbai	Spectra Net	1067	1067
Mumbai	Syscon Infoway	1067	1067
Mumbai	Tata Communication	1067	655**
Mumbai	Tata Tele	1067	1067
Mumbai	You Broadband	1067	1067
Mumbai	Home System	1067	1067
Mumbai	Honesty Net Solution	1067	1067
Mumbai	MTNL	1067	1067
Mumbai	Rajesh Multichannel	1067	1067
Mumbai	Smart Link	1067	1067
Mumbai	Vasai Cable	1067	1067
Mumbai	Indusland Media*	1067	1067
TOTAL		20273	19245

*After the best endeavours of the consultant, due to limited number of subscribers, the consultant was able to achieve 451 samples.

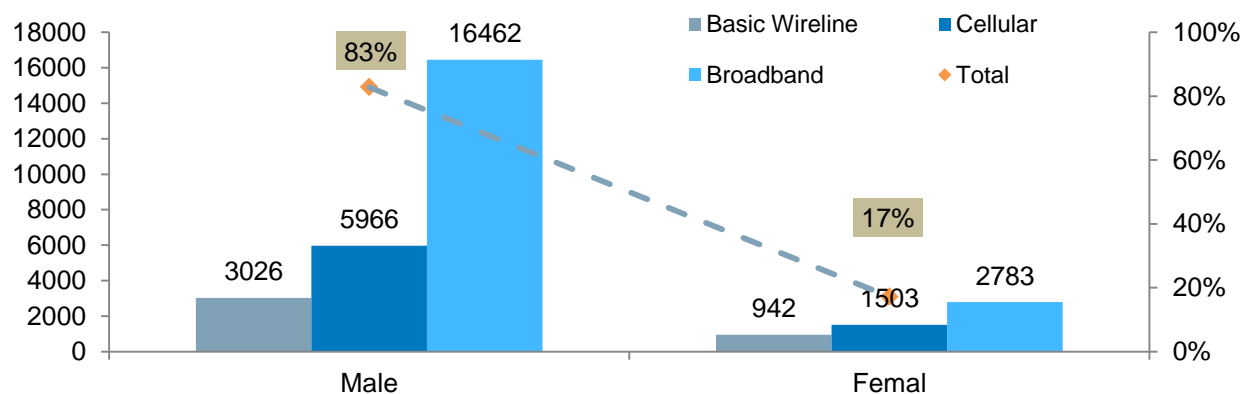
**After the best endeavours of the consultant, due to limited number of subscribers, the consultant was able to achieve 655 samples.

3.6 Sample Characteristics

The sample characteristics for the survey done under the first phase in Mumbai Circle is as under.

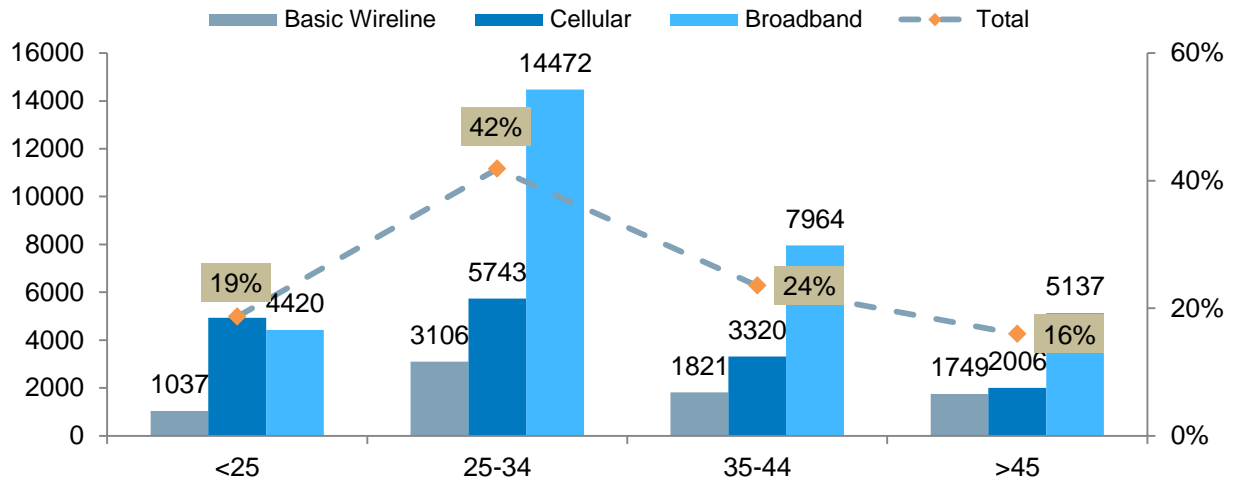
3.6.1 Gender

Figure 3.1: Gender Mix



3.6.2 Age

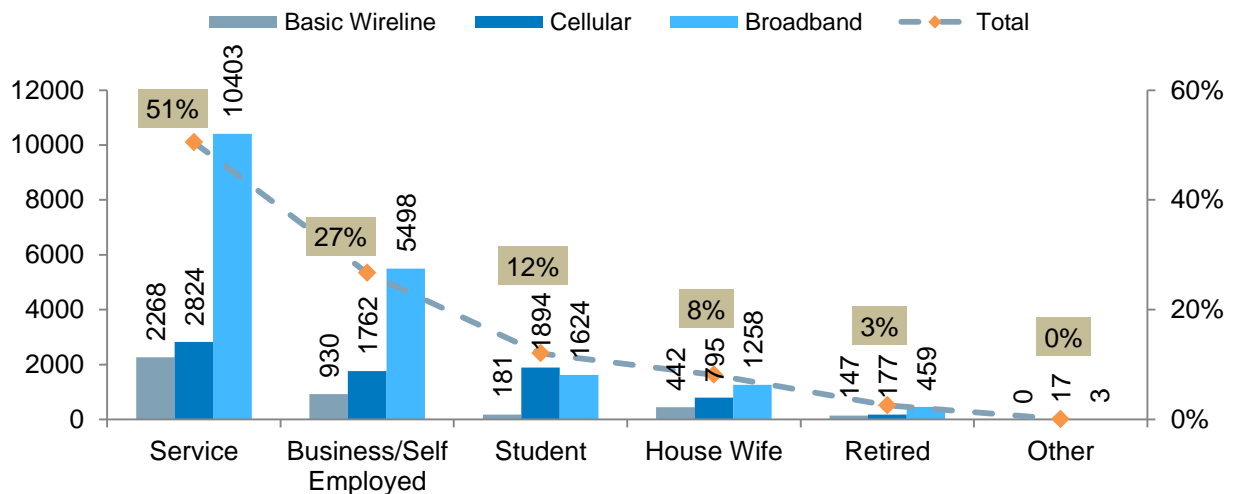
Figure 3.2: Age Group Mix



- It can be observed that the age group of 25-34 is leading in all cases with respect to the survey conducted.
- The proportion of age group of 25-34 is 39% in total sample size followed by 35-44 years, less than 25 years and greater than 45 years.

3.6.3 Occupation

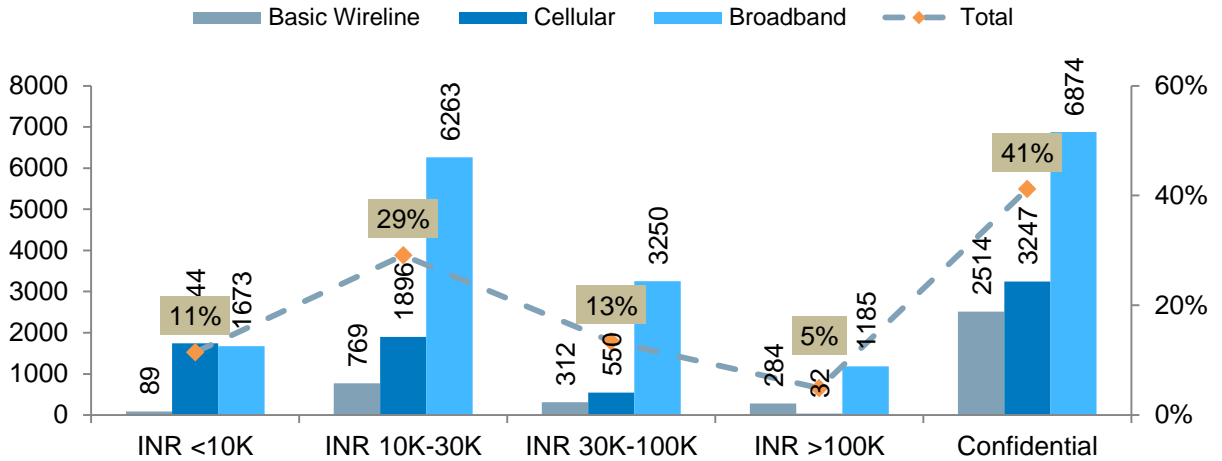
Figure 3.3: Occupation & Sample size



- It can be observed that the Service Category respondents are leading in all cases with respect to the survey conducted.
- The proportion of Service Category respondents is 50% in total sample size followed by service class and housewives.

3.6.4 Income Group (Monthly Family Income)

Figure 3.4: Income Group & Sample size

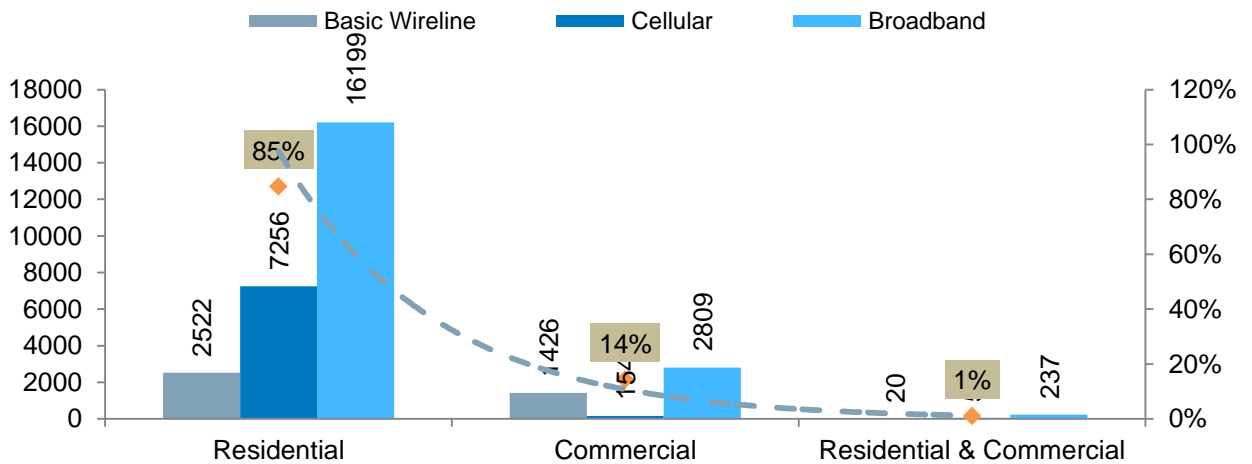


It can be observed that majority of the respondents in case of all three service categories are from income group Rs. 10,000 to 30,000.

However there are in total 42% respondents who have not informed their income.

3.6.5 Usage Type

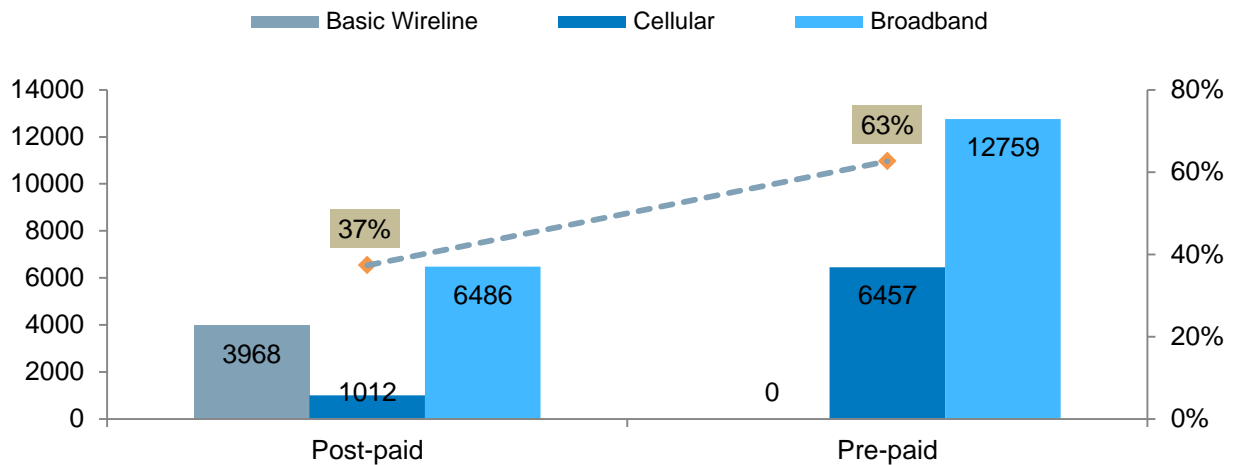
Figure 3.5: Usage Type & Sample size



It can be observed that more than 2/3rd respondents from all services have residential usage of the service.

3.6.6 Connection Type

Figure 3.6: Connection Type & Sample size



It can be observed that more than 60% respondents have pre-paid connection. This is because of cellular service as it can be inferred from the above graph that there are zero respondents from pre-paid service of basic wireline service.

More than 60% of cellular service respondents and more than 85% respondents of broadband services have prepaid connections.

4 Customer Perception of Telecom Service

The parameters and benchmarks relating to customer perception of service for basic telephone service (wireline), cellular mobile telephone services and broadband service are provided in the Standards of Quality of service of basic telephone service (wireline) and cellular mobile telephone service regulations, 2009 and Quality of service of Broadband service regulations, 2006.

In line with these regulations the performance compliance of various service providers against the set parameters and benchmarks is as given below.

4.1 Mumbai Circle - Performance Compliance

4.1.1 Basic Wire-line Service

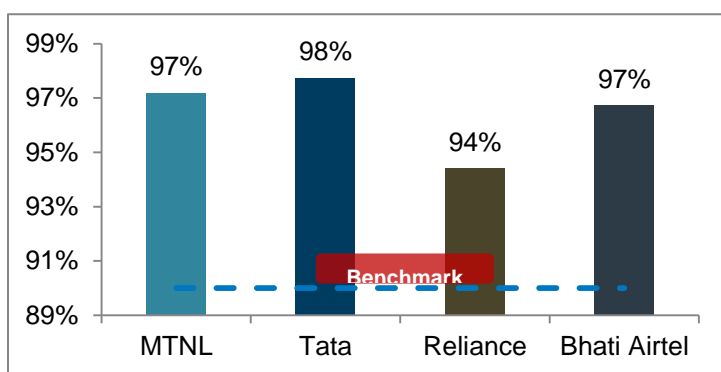
The performance compliance of the service providers for the basic wire-line service is as given below

Table 4.1: Performance Compliance-Basic-Wire line Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	≥90%	97%	98%	94%	97%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	NA	NA	NA	NA
Customer Satisfied With Billing Performance – Post-Paid	≥95%	98%	97%	94%	95%
Customer Satisfied With Help Services	≥95%	92%	87%	88%	93%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	94%	94%	92%	96%
Customer Satisfied With Maintainability	≥90%	95%	83%	86%	93%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	89%	88%	83%	96%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	91%	90%	91%	95%

Source: IMM Analysis

4.1.1.1 Provision of Service



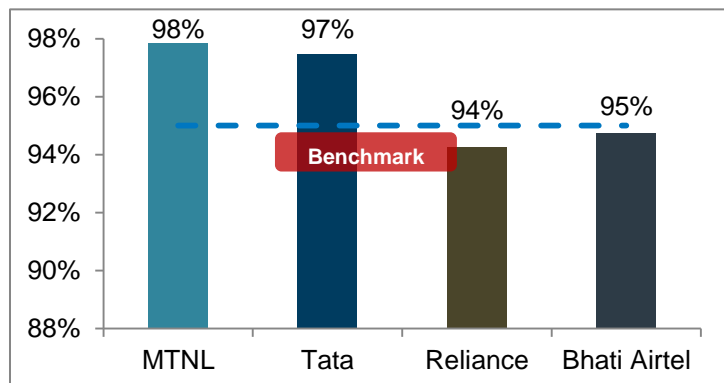
The benchmark for the Provision of Service parameter is that of >90% of the customers being satisfied on the parameter. All the four service providers have met the benchmark for the provision of service parameter. In case of Tata 98% of the customers, in case of MTNL and Bharti Airtel 97% and in case of Reliance 94% of the customers are satisfied.

Table 4.2: Provision of Service

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	>90%	97%	98%	94%	97%

Source: IMM Analysis

4.1.1.2 Billing Performance-Post-Paid



■ The benchmark for the Billing Performance parameter is that of >95% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the Billing Performance parameter except Reliance missed the benchmark with marginal difference of 1%.

Table 4.3: Billing Performance: Post-Paid – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Billing Performance – Post-Paid	>95%	98%	97%	94%	95%

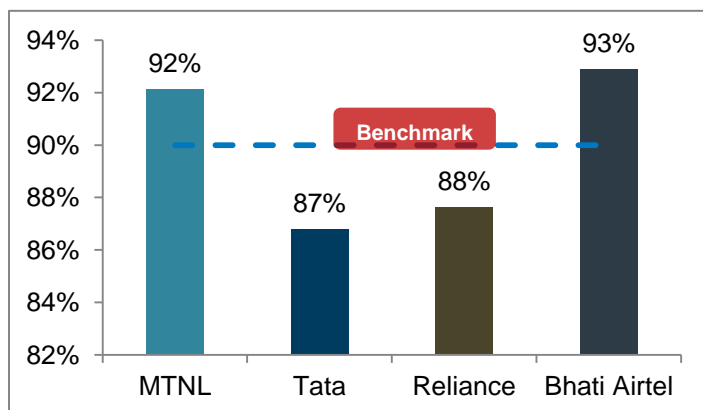
Source: IMM Analysis

The break-up of responses with respect to major complaints related to billing is given below.

Table 4.4: Break-up of complaints related to billing – Post Paid

	MTNL	Tata	Reliance	Bharti Airtel
Non – Receipt of Physical / E-copy of Bill	1%	4%	6%	1%
Timely receipt of Bill	1%	4%	6%	1%
Information not received about change in Plan Charges	1%	1%	0%	0%
Excess bill	2%	3%	1%	1%
Incomplete details	4%	4%	4%	3%
Lack of payment option	3%	3%	0%	2%
Other	0%	0%	0%	0%
None	87%	82%	83%	91%

4.1.1.3 Help Services



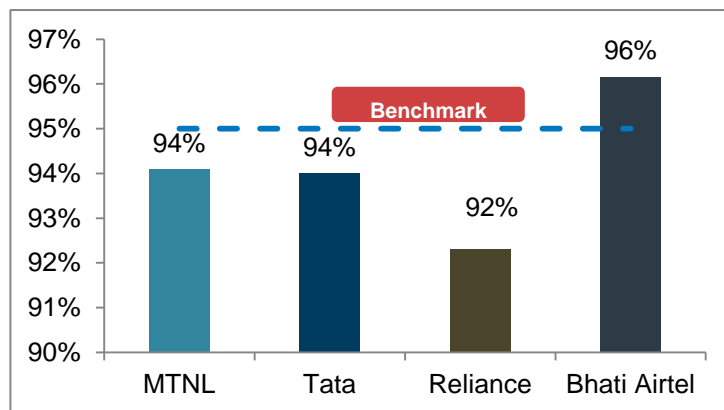
■ The benchmark for the Help Services parameter is that of >90% of the customers being satisfied on the parameter. MTNL and Airtel have met the benchmark for the parameter while the others have not. In case of Airtel 93% of the customers and in case of MTNL 92% of the customers are satisfied. While Reliance and Tata have not been able to meet the parameter by marginal difference of 2% and 3% respectively.

Table 4.5: Help Services – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Help Services	>95%	92%	87%	88%	93%

Source: IMM Analysis

4.1.1.4 Network Performance, Reliability and Availability



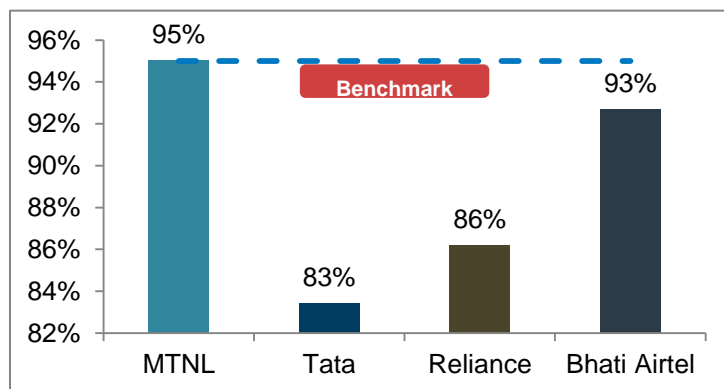
■ The benchmark for the Network Performance, Reliability and Availability parameter is that of >95% of the customers being satisfied on the parameter. Except Bharti Airtel, no service provider has met the benchmark level of satisfaction. MTNL and Tata have missed the benchmark with marginal difference of 1%.

Table 4.6: Network Performance, Reliability and Availability – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Network Performance, Reliability and Availability	>95%	94%	94%	92%	96%

Source: IMM Analysis

4.1.1.5 Maintainability



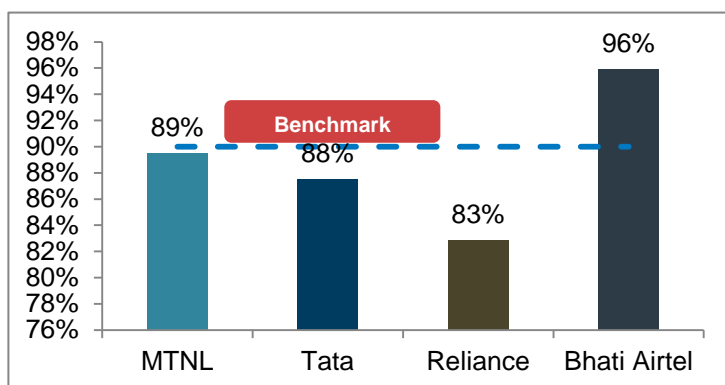
■ The benchmark for the Maintainability parameter is that of >95% of the customers being satisfied on the parameter. MTNL have met the benchmark for the parameter while the others have not. In case of Airtel 93% of the customers are satisfied. While In case of Tata and Reliance satisfaction level is 83% and 86% respectively.

Table 4.7: Maintainability – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Maintainability	>95%	95%	83%	86%	93%

Source: IMM Analysis

4.1.1.6 Supplementary Services and Value Added Services



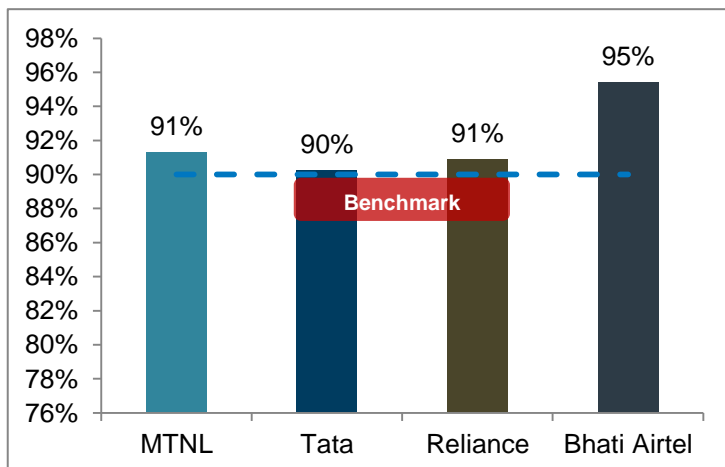
■ The benchmark for the Supplementary Services and Value Added Services parameter is that of >90% of the customers being satisfied on the parameter. Except Airtel, no service provider has met the benchmark parameter.

Table 4.8: Supplementary and Value Added Services – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Supplementary and Value Added Services	>90%	89%	88%	83%	96%

Source: IMM Analysis

4.1.1.7 Overall Quality of Telephone Service



■ The benchmark for the Overall Quality of Telephone Service parameter is that of >90% of the customers being satisfied on the parameter. All of the service providers have met the benchmark for the parameter. In case of Airtel 95% of the customers, in case of MTNL, Tata and Reliance the satisfaction level is 91%, 90% and 91% respectively.

Table 4.9: Overall Quality of Telephone Service – Mumbai Circle

Parameter	Benchmark	MTNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Overall Quality of Telephone Service	>90%	91%	90%	91%	95%

Source: IMM Analysis

4.1.2 Cellular Service

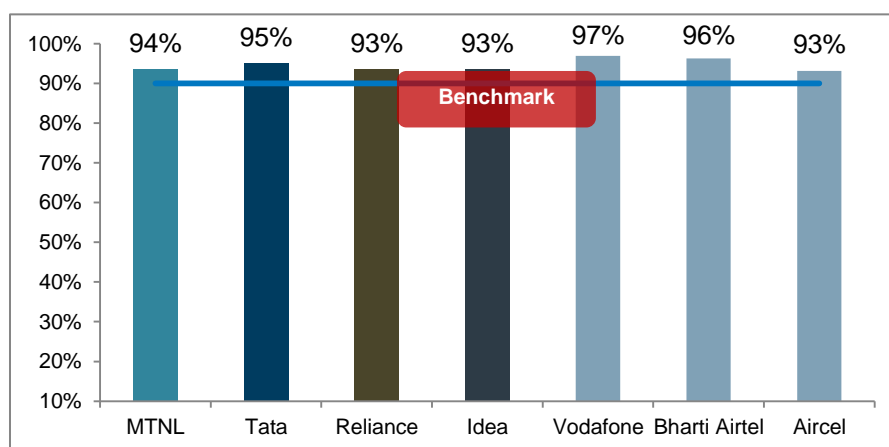
The performance compliance of the service providers for the cellular service is as given below

Table 4.10: Performance Compliance-Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Provision of Service	≥90%	94%	95%	93%	93%	97%	96%	93%
Billing Performance – Pre-Paid	≥95%	95%	96%	95%	95%	98%	97%	96%
Billing Performance – Post-Paid	≥95%	93%	98%	91%	91%	90%	92%	91%
Help Services	≥90%	93%	93%	91%	94%	93%	93%	92%
Network Performance, Reliability and Availability	≥95%	87%	90%	90%	92%	96%	92%	90%
Maintainability	≥95%	93%	95%	87%	95%	94%	93%	93%
Supplementary Services and Value Added Services	≥90%	86%	94%	91%	87%	90%	92%	87%
Overall Quality of Telephone Service	≥90%	91%	92%	91%	93%	94%	91%	90%

Source: IMM Analysis

4.1.2.1 Provision of Service

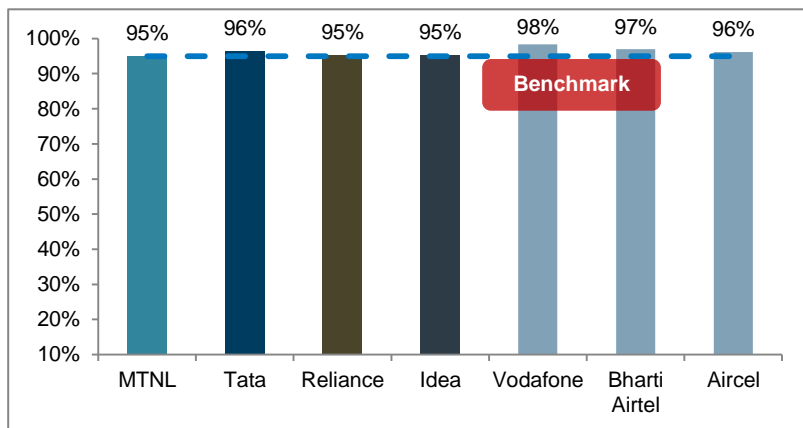


- The benchmark for the Provision of Service parameter is that of >90% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the provision of service parameter.

Table 4.11: Provision of Service -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Provision of Service	≥90%	94%	95%	93%	93%	97%	96%	93%

4.1.2.2 Billing Performance-Pre-Paid



■ The benchmark for the Billing Performance parameter is that of >95% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the parameter.

Table 4.12: Billing Performance – Pre-Paid -Cellular Service (Mumbai Circle)

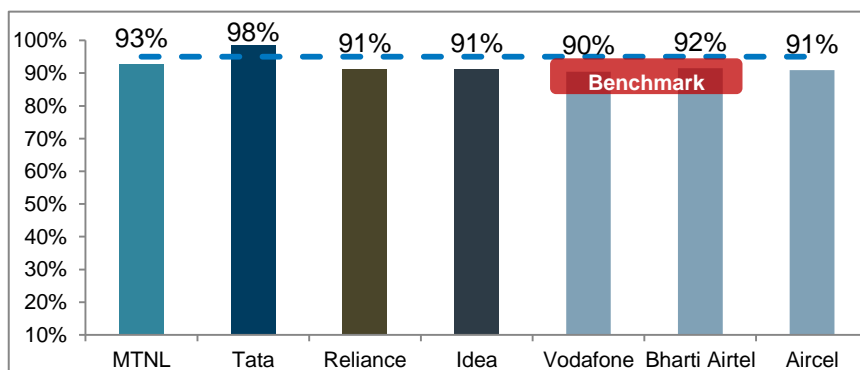
Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Billing Performance – Pre-Paid	>95%	95%	96%	95%	95%	98%	97%	96%

The break-up of responses with respect to major complaints related to billing is given below.

Table 4.13: Break-up of complaints related to billing (Pre-paid)

Parameter	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
High usage charges	12%	17%	20%	17%	15%	15%	19%
Clarity on Waiver / Carry Forward Policy	14%	12%	20%	16%	9%	15%	12%
Lack of Payment / Recharge option	10%	11%	20%	13%	14%	13%	13%
Validity or reduction in benefits in case of hike in charges	7%	11%	10%	13%	17%	14%	12%
Other	0%	0%	0%	0%	0%	0%	0%
None	86%	83%	80%	83%	83%	85%	81%

4.1.2.3 Billing Performance-Post-Paid



The benchmark for the Billing Performance parameter is that of >95% of the customers being satisfied on the parameter. Except Tata, all other service provider are missing the parameter marginally.

Table 4.14: Billing Performance – Post-Paid -Cellular Service (Mumbai Circle)

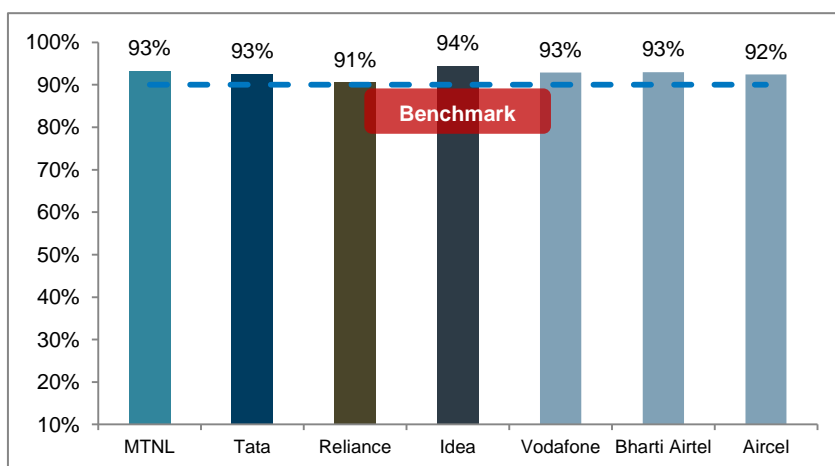
Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Billing Performance – Post-Paid	>95%	93%	98%	91%	91%	90%	92%	91%

The break-up of responses with respect to major complaints related to billing is given below.

Table 4.15: Break-up of complaints related to billing – Post-Paid

	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Non – Receipt of Physical / E-copy of Bill	7%	5%	4%	9%	12%	8%	13%
Timely receipt of Bill	6%	33%	22%	26%	8%	17%	31%
Information not received about change in Plan Charges	3%	18%	13%	16%	13%	12%	22%
Excess bill	7%	25%	29%	24%	13%	19%	20%
Incomplete details	1%	7%	7%	8%	5%	4%	9%
Lack of payment option	2%	11%	4%	8%	6%	5%	4%
Other	0%	0%	0%	0%	0%	0%	0%
None	93%	67%	71%	74%	87%	81%	69%

4.1.2.4 Help Services

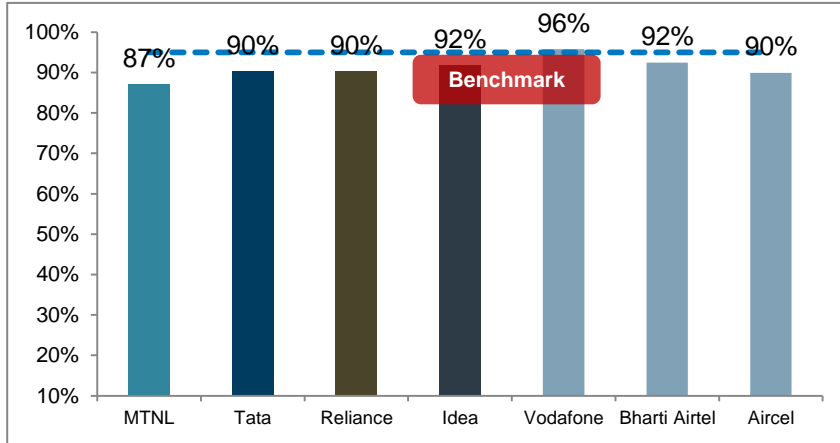


The benchmark for the Help Services parameter is that of >90% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the parameter.

Table 4.16: Help Services -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Help Services	>95%	93%	93%	91%	94%	93%	93%	92%

4.1.2.5 Network Performance, Reliability and Availability

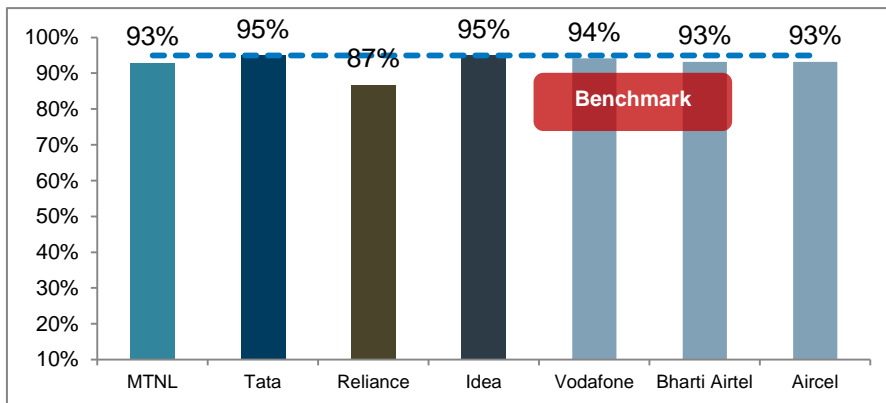


■ The benchmark for the Network Performance, Reliability and Availability parameter is that of >95% of the customers being satisfied on the parameter. Except Vodafone, no service provider has met the parameter. However the satisfaction is in the range of 87-92%.

Table 4.17: Network Performance, Reliability and Availability -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Network Performance, Reliability and Availability	>95%	87%	90%	90%	92%	96%	92%	90%

4.1.2.6 Maintainability

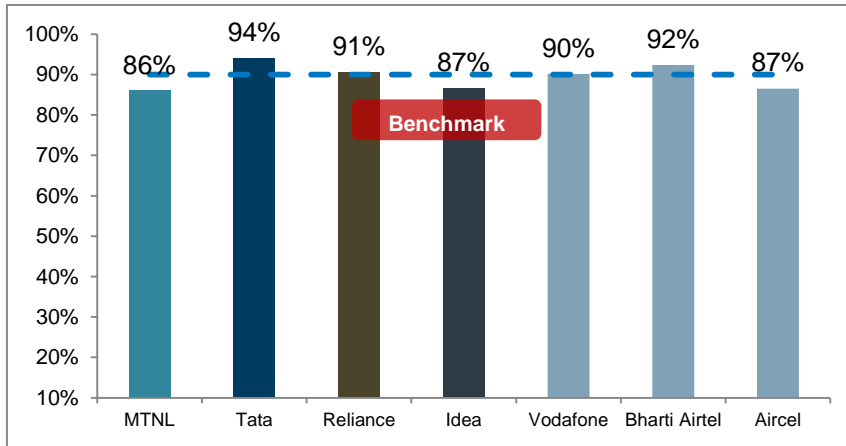


■ The benchmark for the Maintainability parameter is that of >95% of the customers being satisfied on the parameter. Tata and Idea have met the benchmark parameters. Others have marginally missed the benchmark satisfaction level.

Table 4.18: Maintainability -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Maintainability	>90%	93%	95%	87%	95%	94%	93%	93%

4.1.2.7 Supplementary Services and Value Added Services

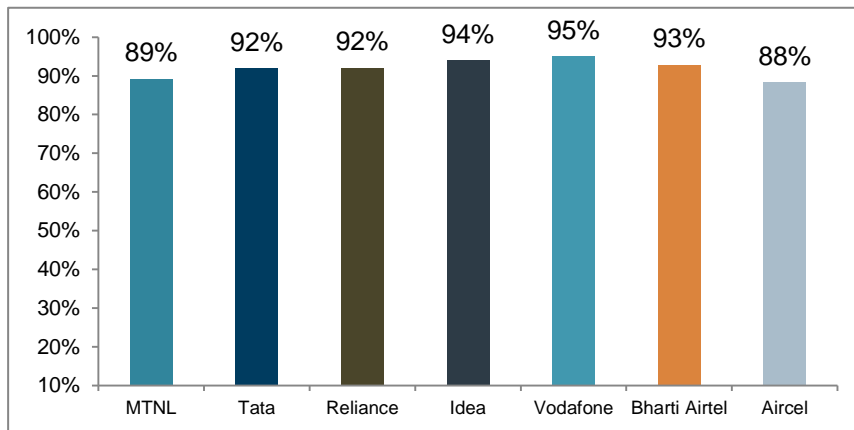


The benchmark for the Supplementary Service and Value Added Services parameter is that of >90% of the customers being satisfied on the parameter. Tata, Reliance, Vodafone and Airtel have met the benchmark parameters. Others have marginally missed the benchmark satisfaction level.

Table 4.19: Supplementary Services and Value Added Services -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Supplementary Services and Value Added Services	>90%	86%	94%	91%	87%	90%	92%	87%

4.1.2.8 Mobile Data / Internet Service



Customers of all service providers except MTNL and Aircel have satisfaction level of more than 90% in case of mobile data / internet service.

Table 4.20: Mobile Data/Internet Service -Cellular Service (Mumbai Circle)

Parameter	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Mobile Data/Internet Service	89%	92%	92%	94%	95%	93%	88%

4.1.2.9 Wireless / USB / Dongle Service

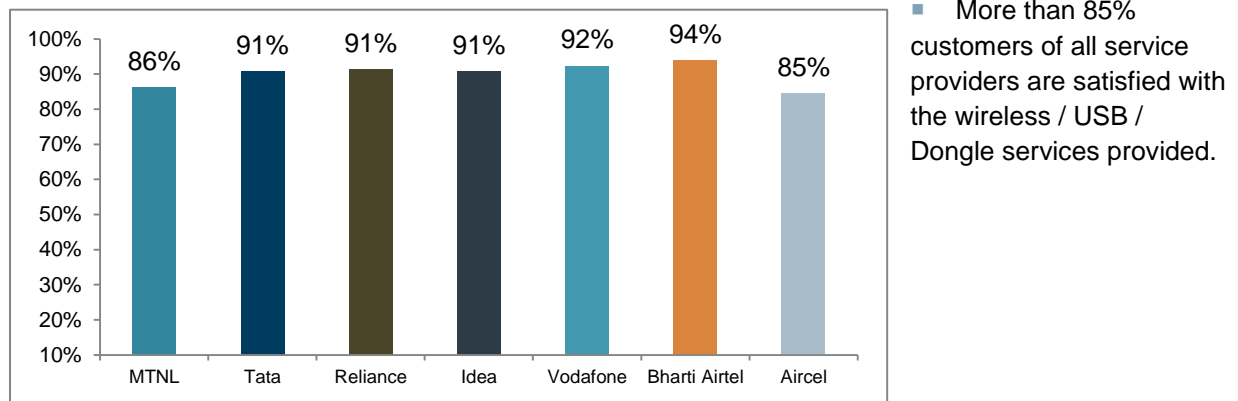
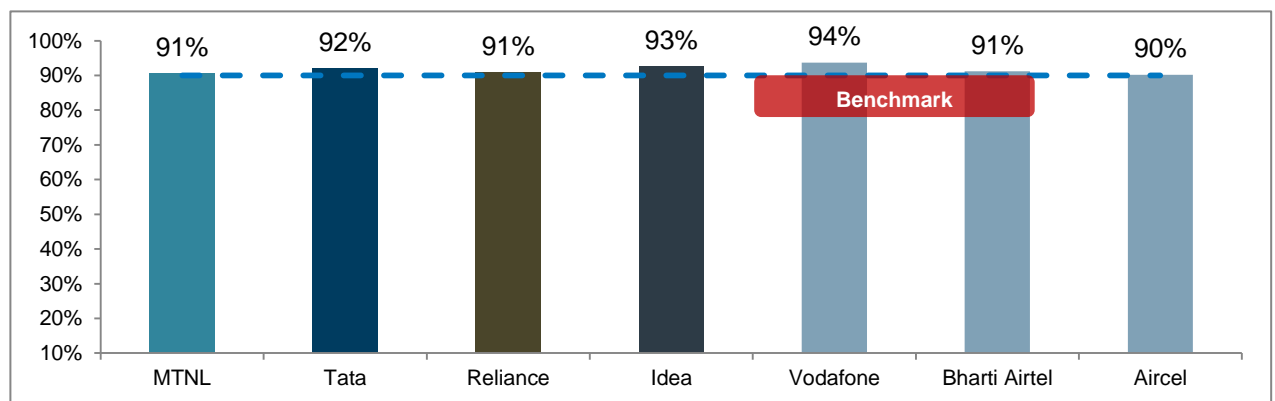


Table 4.21: Wireless / USB / Dongle Service -Cellular Service (Mumbai Circle)

Parameter	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Wireless / USB / Dongle Service	86%	91%	91%	91%	92%	94%	85%

4.1.2.10 Overall Quality of Telephone Service



- The benchmark for the Overall Quality of Telephone Service parameter is that of >90% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the parameter. Vodafone has the highest satisfaction level of 94% while the others have satisfaction levels in the range of 90-93%.

Table 4.22: Overall Quality of Telephone Service -Cellular Service (Mumbai Circle)

Parameter	Benchmark	MTNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Overall Quality of Telephone Service	>90%	91%	92%	91%	93%	94%	91%	90%

4.1.3 Broadband Services

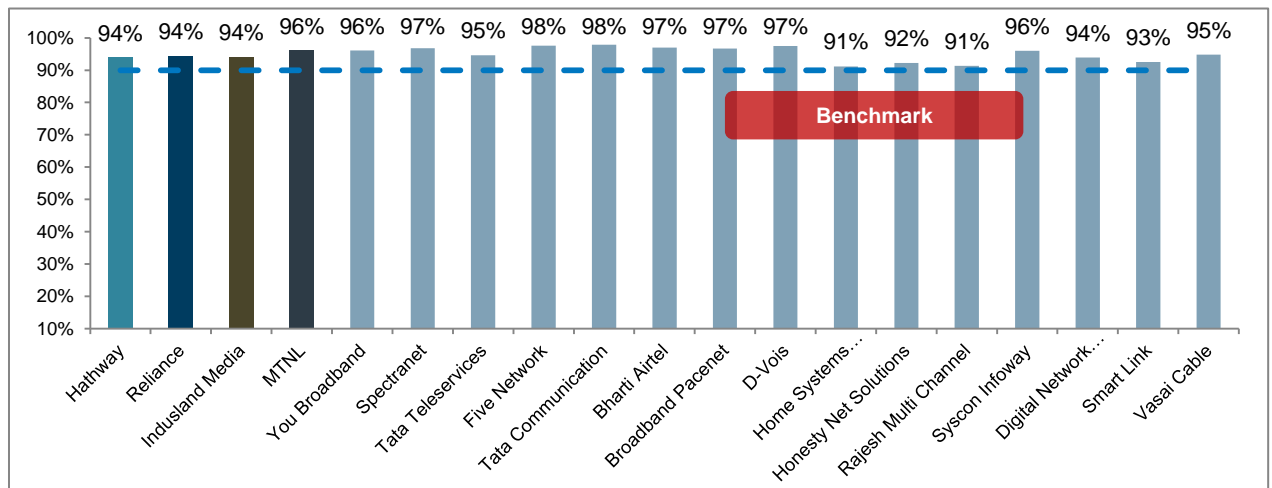
The performance compliance of the service providers for the broadband service is as given below.

Table 4.23: Performance Compliance-Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Communicatio n	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems Private Limited	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Network Association	Smart Link	Vasai Cable
Provision of service	>90%	94%	94%	95%	96%	96%	95%	95%	98%	95%	97%	97%	97%	91%	92%	91%	96%	94%	93%	95%
Billing performance: Pre-Paid	>90%	91%	-	94%	-	97%	-	-	95%	-	-	96%	94%	92%	94%	-	94%	92%	90%	92%
Billing performance: Post-Paid	>90%	91%	91%	-	94%	-	95%	94%	-	91%	97%	-	-	-	-	96%	-	-	-	-
Help services	>90%	85%	88%	88%	88%	88%	70%	89%	89%	87%	95%	89%	90%	87%	86%	88%	88%	90%	87%	89%
Network performance, reliability and availability	>85%	84%	83%	84%	85%	84%	85%	84%	85%	84%	91%	88%	85%	83%	81%	84%	84%	84%	82%	84%
Maintainability	>85%	86%	84%	85%	88%	83%	81%	83%	82%	84%	92%	87%	85%	83%	82%	80%	83%	83%	84%	84%
Supplementary services	>85%	77%	-	-	85%	83%	79%	80%	81%	80%	83%	88%	88%	-	86%	-	-	-	86%	86%
Overall Customer Satisfaction	>85%	88%	86%	86%	87%	87%	86%	89%	89%	88%	91%	88%	89%	88%	89%	87%	86%	88%	88%	87%

Source: IMM Analysis

4.1.3.1 Provision of Service

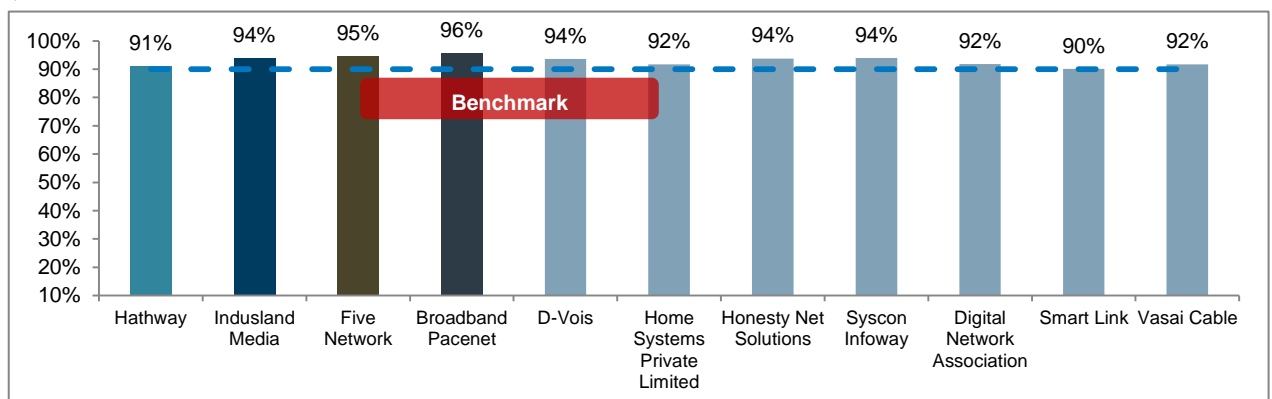


- The benchmark for the Provision of Service parameter is >90%. All the service providers have met the benchmark for the Provision of Service parameter.

Table 4.24: Provision of Service-Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems Private Limited	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network Association	Smart Link	Vasai Cable
Provision of service	>90 %	94 %	94 %	94 %	96 %	96 %	97 %	95 %	98 %	98 %	97 %	97 %	97 %	91 %	92 %	91 %	96 %	94 %	93 %	95 %

4.1.3.2 Billing Performance Pre-Paid



- The benchmark for the Billing Performance parameter is that of >90% of the customers being satisfied on the parameter. All the service providers providing pre-paid services have met the benchmark for the parameter.

Table 4.25: Billing Performance: Pre-Paid -Broadband Service (Mumbai Circle)

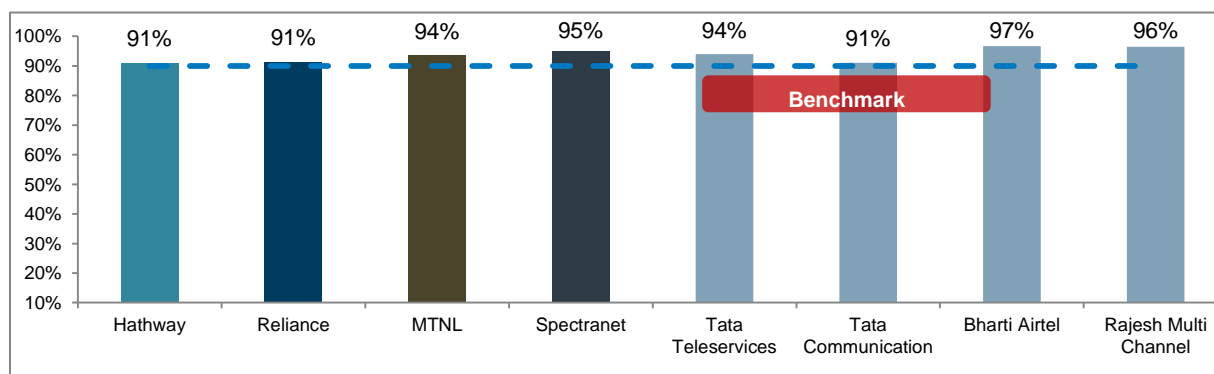
Parameter	Benchmark	Hathway	Indusland Media	You Broadband	Five Network	Broadband Pacenet	D-Vois	Home Systems Private Limited	Honesty Net Solutions	Syscon Infoway	Digital Network Association	Smart Link	Vasai Cable
Billing Performance: Pre-Paid	>90%	91%	94%	97%	95%	96%	94%	92%	94%	94%	92%	90%	92%

The break-up of responses with respect to major complaints related to billing is given below.

Table 4.26: Break-up of complaints related to billing – Pre-Paid

Parameter	Hathway	Indusland Media	You Broadband	Five Network	Broadband Pacenet	D-Vois	Home Systems Private Limited	Honesty Net Solutions	Syscon Infoway	Digital Network Association	Smart Link	Vasai Cable
High usage charges	1%	0%	21%	4%	0%	3%	0%	14%	0%	0%	0%	0%
Clarity on Waiver / Carry Forward Policy	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Lack of Payment / Recharge option	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Validity or reduction in benefits in case of hike in charges	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
None	99%	100%	77%	95%	100%	97%	100%	85%	100%	100%	100%	100%

4.1.3.3 Billing Performance-Post-Paid



- The benchmark for the Billing Performance parameter is that of >90% of the customers being satisfied on the parameter. All of the service providers having post-paid services have met the benchmark for the Billing Performance parameter.

Table 4.27: Billing Performance: Post-Paid-Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	MTNL	Spectranet	Tata Teleservices	Tata Communication	Bharti Airtel	Rajesh Multi Channel
Billing Performance: Post -Paid	>90%	91%	91%	94%	95%	94%	91%	97%	96%

The break-up of responses with respect to major complaints related to billing is given below.

Table 4.28: Break-up of complaints related to billing – Post-Paid

Parameter	Hathway	Reliance	MTNL	Spectranet	Tata Teleservices	Tata Communication	Bharti Airtel	Rajesh Multi Channel
Non – Receipt of Physical / E-copy of Bill	0%	6%	0%	3%	9%	2%	0%	0%
Timely receipt of Bill	0%	4%	3%	0%	5%	0%	1%	0%
Information not received about change in Plan Charges	0%	0%	1%	0%	4%	0%	0%	0%
Excess bill	0%	2%	5%	1%	6%	1%	2%	0%
Incomplete details	0%	0%	0%	0%	7%	0%	0%	0%
Lack of payment option	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%
None	100%	89%	91%	95%	69%	97%	97%	99%

4.1.3.4 Help Services

- The benchmark for the Help Services parameter is that of >90% of the customers being satisfied on the parameter. The satisfaction levels for the Help Services are low as compared to other parameters. Airtel have met the benchmark for the parameter with satisfaction level of 95%. The satisfaction levels of the other service providers are in the range of 70-90%

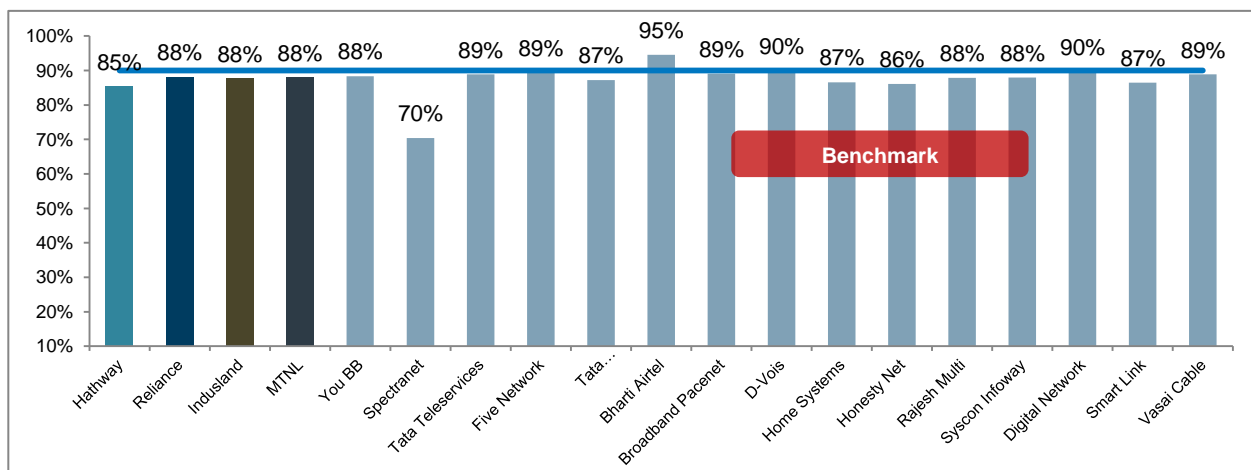
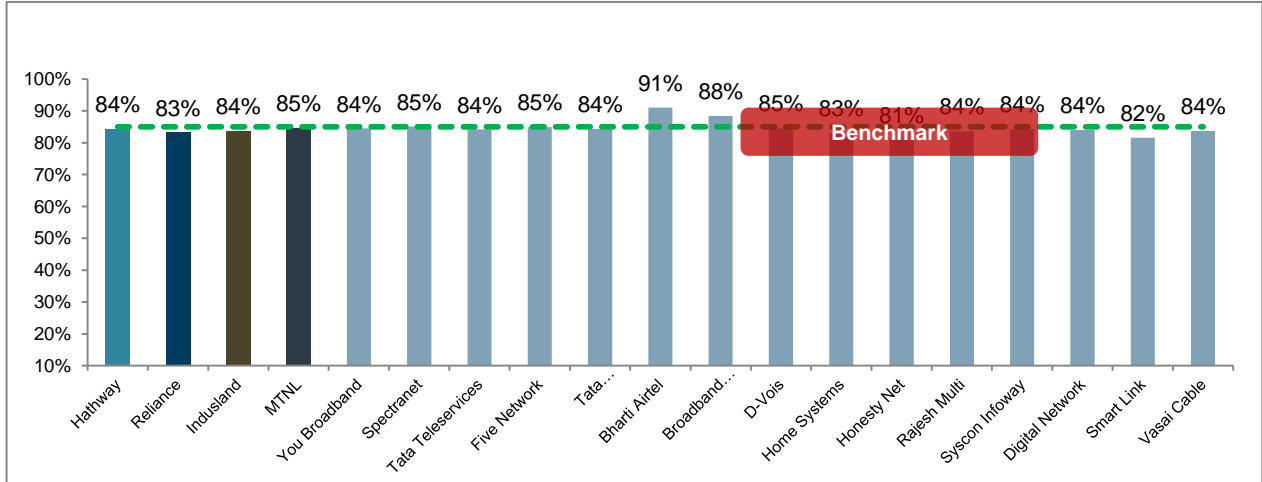


Table 4.29: Help Services -Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network	Smart Link	Vasai Cable
Help Service	>90 %	85%	85%	85%	85%	85%	70%	89%	89%	87%	95%	89%	90%	87%	86%	88%	88%	90%	87%	89%

4.1.3.5 Network Performance, Reliability and Availability

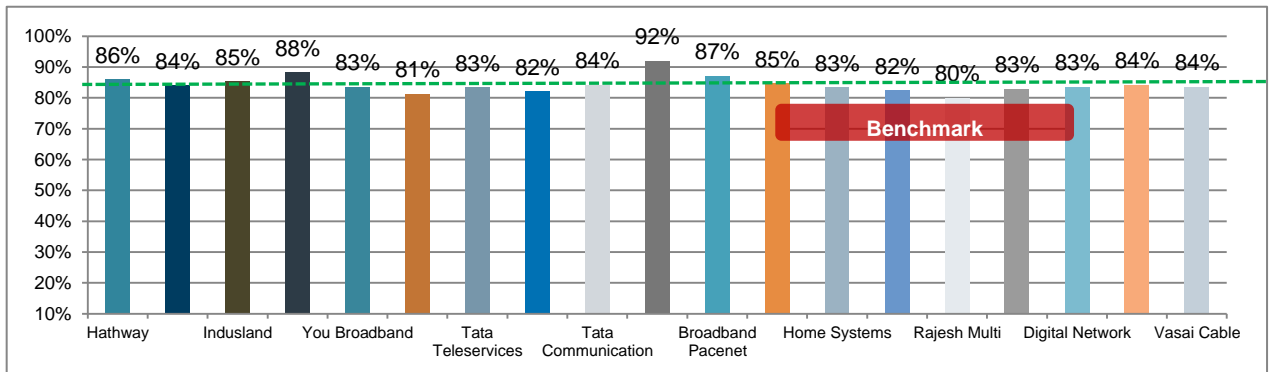


- The benchmark for the Network Performance, Reliability and Availability parameter is that of >85% of the customers being satisfied on the parameter. Spectranet, Airtel and Broadband have met the benchmark parameters. Others have marginally missed the benchmark satisfaction level.

Table 4.30: Network performance, reliability and availability-Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network	Smart Link	Vasai Cable
Network performance, reliability and availability	>85%	84%	83%	84%	85%	84%	85%	84%	85%	84%	91%	88%	85%	83%	81%	84%	84%	84%	82%	84%

4.1.3.6 Maintainability

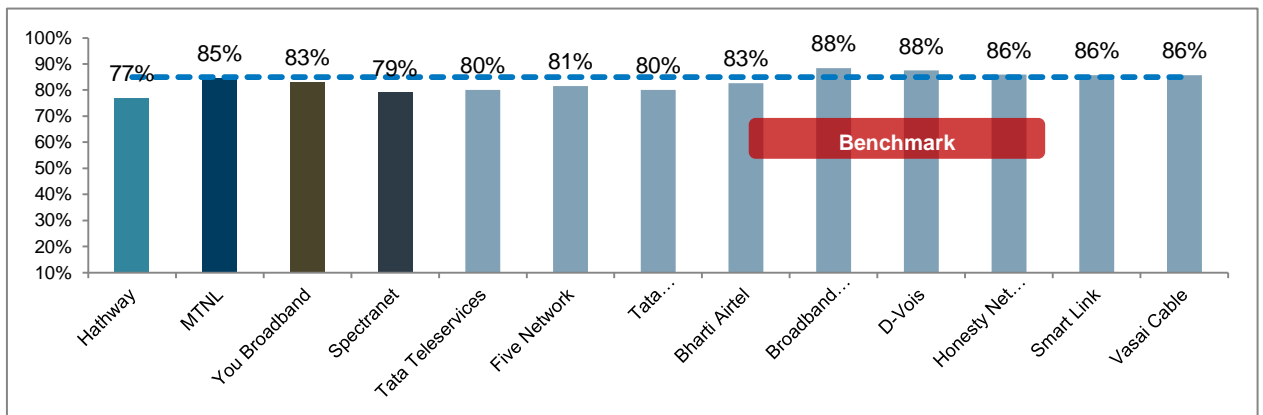


- The benchmark for the Maintainability parameter is that of >85% of the customers being satisfied on the parameter. MTNL, Hathway, Indusland, Airtel, and Broadband Pacenet have met the benchmark for the Maintainability parameter. The satisfaction levels of the other service providers are in the range of 80-84%.

Table 4.31: Maintainability -Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network	Smart Link	Vasai Cable
Maintainability	>85 %	86 %	84 %	85 %	88 %	83 %	81 %	83 %	82 %	84 %	92 %	87 %	85 %	83 %	82 %	80 %	83 %	83 %	84 %	84 %

4.1.3.7 Supplementary Services and Value Added Services

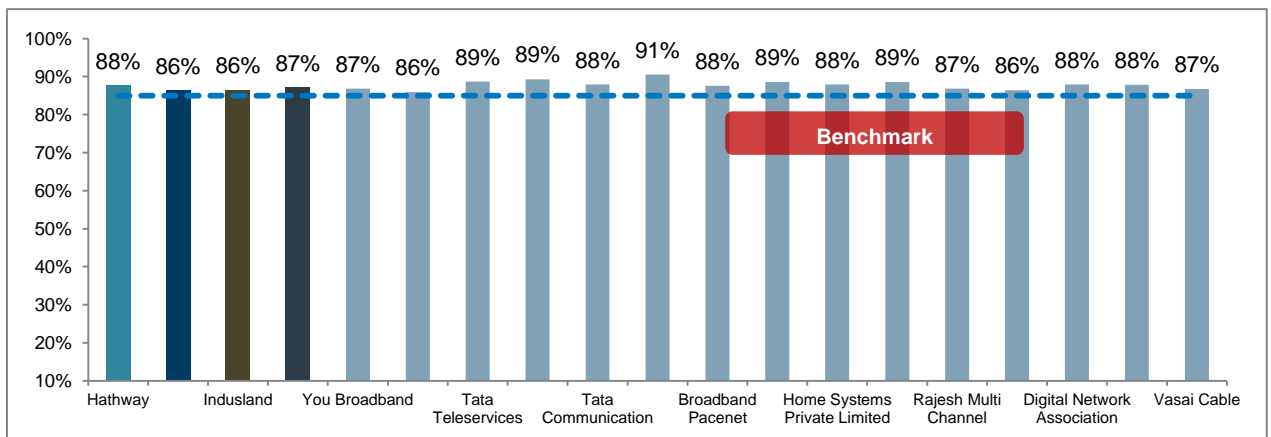


- The benchmark for the Supplementary Services and Value Added Services parameter is that of >85% of the customers being satisfied on the parameter. Except Broadband Pacenet, D-Vois, Honesty has met the benchmark on this parameter. The satisfaction levels of all the service providers are in the range of 77-83%.

Table 4.32: Supplementary Services -Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network	Smart Link	Vasai Cable
Supplementary Services	>85%	77%	85%	83%	79%	80%	81%	80%	83%	88%	88%	-	86%	-	-	-	86%	86%

4.1.3.8 Overall Quality of Telephone Service



Final Report - West Zone (Mumbai)

Assessment of (i) implementation and effectiveness of various regulations, directions and orders issued by TRAI in the interest of consumers and (ii) Customer Perception of Telecom Service Through Surveys



- The benchmark for the Overall Quality of Telephone Service parameter is that of >85% of the customers being satisfied on the parameter. All of the service providers have met the benchmark for the parameter. Highest level of satisfaction is in case of Airtel.

Table 4.33: Overall Customer Satisfaction -Broadband Service (Mumbai Circle)

Parameter	Benchmark	Hathway	Reliance	Indusland Media	MTNL	You Broadband	Spectranet	Tata Teleservices	Five Network	Tata Communication	Bharti Airtel	Broadband Pacenet	D-Vois	Home Systems	Honesty Net Solutions	Rajesh Multi Channel	Syscon Infoway	Digital Network	Smart Link	Vasai Cable
Overall Customer Satisfaction	>85%	86%	86%	86%	86%	87%	87%	87%	87%	88%	88%	88%	88%	88%	88%	89%	89%	89%	89%	91%

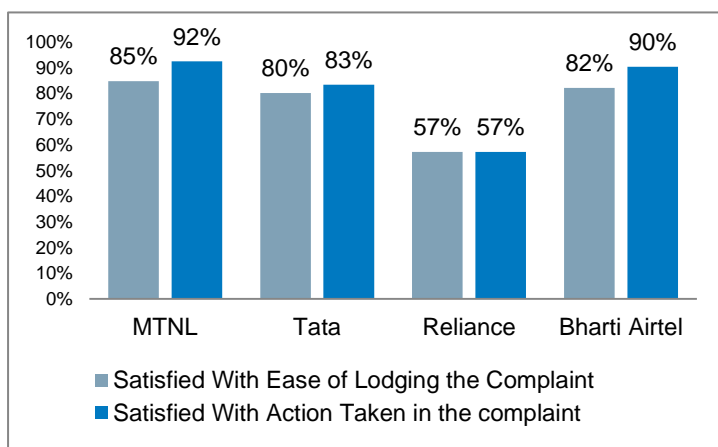
5 Assessment of TRAI Regulations and Directions

5.1 Basic Wire Line Services

5.1.1 The Telecom Commercial Communications Customer Preference Regulations, 2010

The Telecom Commercial Communications Customer Preference Regulations, 2010 gives a telecom consumer the option of registering his/her mobile number for not receiving/blocking unsolicited commercial calls / SMSs. The consumer also has the option to register his number to be accessible to telemarketers of specific sectors. The telecom service providers have to ensure that such unsolicited calls/SMSs be blocked to the registered number with a specific time frame. In case the call/SMSs aren't stopped the telecom consumer may register a complaint on specific toll free numbers.

- 15% of surveyed customers of Airtel have registered their number for not receiving / blocking unsolicited commercial calls / SMSs, being the highest amongst all the service providers.
- 82% of the customers of Airtel who had registered their number for not receiving / blocking unsolicited commercial calls / SMSs were satisfied with the effectiveness of the same. In case of Tata 83%, in case of MTNL 82% and Reliance 76% of the customers are satisfied with the effectiveness of blocking of unsolicited commercial calls.
- 18% consumers from MTNL have lodged a complaint in case the unsolicited call/SMS had not stopped in spite of registration, being the highest amongst all service providers.



- 88% of the customers of Airtel who had lodged a complaint were satisfied with the ease of lodging a complaint in case the unsolicited call/SMS had not stopped in spite of registration being highest among others.
- In case of satisfaction with action taken, MTNL is on the top followed by Tata, Airtel and Reliance.

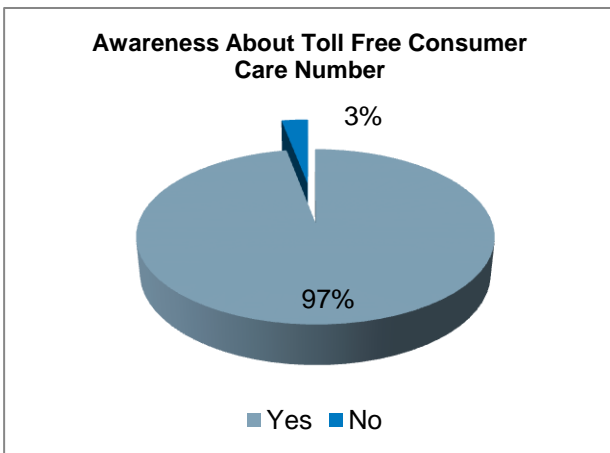
Table 5.1: Assessment of Telecom Commercial Communications Customer Preference Regulation

Particular	MTNL	Tata	Reliance	Bharti Airtel
Number registered for not receiving / blocking unsolicited commercial calls / SMSs	7%	10%	11%	15%
Customers satisfied with the effectiveness of blocking of unsolicited commercial calls	82%	83%	76%	82%
Registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same	18%	5%	8%	13%
Customers satisfied with the ease of lodging the complaint	85%	80%	57%	82%
Customers satisfied with the action taken on the complaint	92%	83%	57%	90%

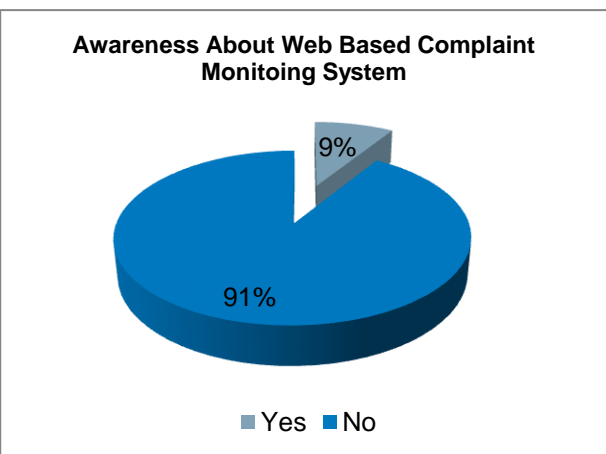
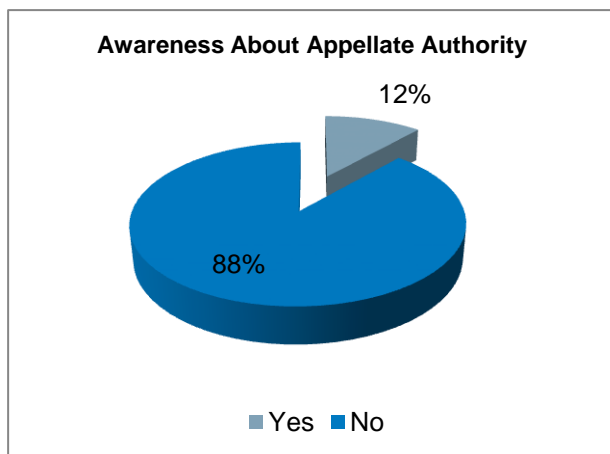
Source: IMM Analysis

5.1.2 Telecom Consumers Complaint Redressal Regulations, 2012

As per the Telecom Consumers Complaint Redressal Regulation there are three grievance redressal



mechanisms a consumer can use to register their complaints which include the Toll Free Consumer Care Number, Appellate Authority for filing appeal in cases not satisfied with redressal of complaints and Web Based Complaint Monitoring System. The awareness about the toll free consumer care number is the highest with more than 97% of the total surveyed sample being aware about it. About 12% of the total respondents were aware about the Appellate Authority while 9% of the respondents were aware about the Web Based Complaint Monitoring System.



5.1.2.1 Level of Satisfaction with the Action Taken on Complaints

- 57% of surveyed customers of Reliance and Tata have registered a complaint with the Toll Free Consumer Care number, being the highest amongst all the service providers followed by Bharti Airtel and MTNL. On the other hand MTNL has the least percentage of surveyed consumers who have registered a complaint with only 50% of the consumers have registered a complaint with Toll Free Consumer Care number.
- More than 75% of customers from all service providers who had registered a complaint with the Toll Free Consumer Care number were satisfied with the action taken on it. However the satisfaction level on action taken on complaint registered on toll free number is higher in case of MTNL and Bharti Airtel being 88% and 87% respectively.

- Around 2-6% of surveyed customers of from each service providers have registered a complaint with the Appellate Authority, Tata being the highest amongst all the service providers. More than 74% of such customers are satisfied with the action taken.
- The satisfaction level is higher in case of Reliance and MTNL followed by Tata and Bharti Airtel with respect to action taken on complaint made with Appellate Authority.

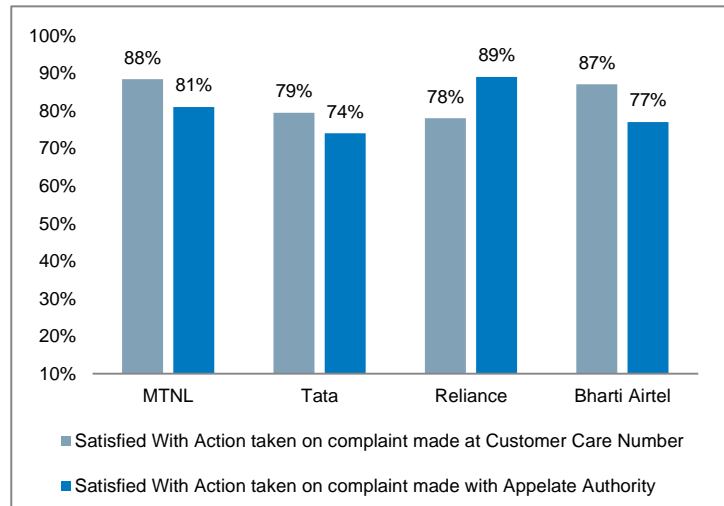


Table 5.2: Assessment of Telecom Consumer Protection Regulation

Particular	MTNL	Tata	Reliance	Bharti Airtel
Made complaint to the toll free Consumer Care Number	50%	57%	57%	54%
Customers satisfied with the manner in which complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint	88%	79%	78%	87%
Filed any appeal with the appellate authority	3%	6%	5%	2%
Customers satisfied with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.	81%	74%	89%	77%

Source: IMM Analysis

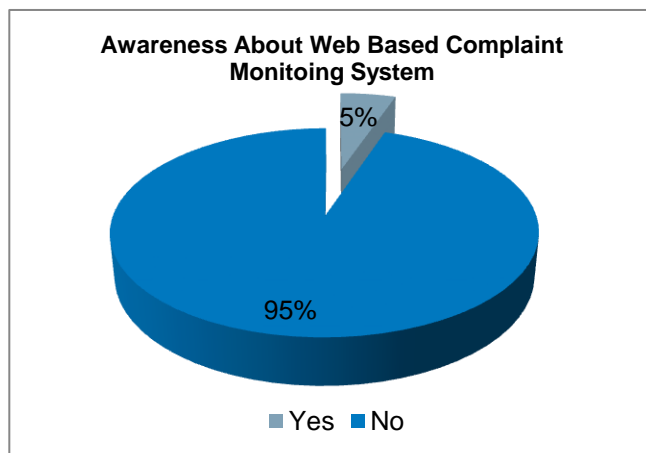
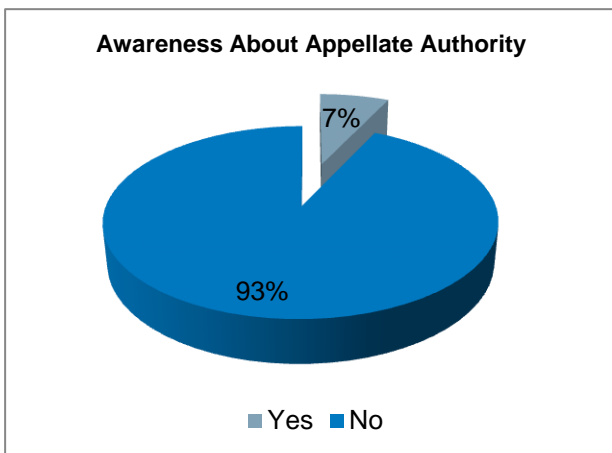
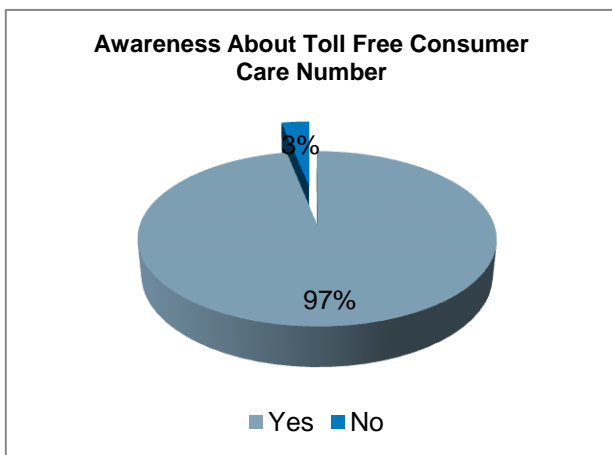
5.2 Cellular Service

The assessment of TRAI regulations specific to the cellular service is as under

5.2.1 Telecom Consumers Complaint Redressal Regulations, 2012

As per the Telecom Consumers Complaint Redressal Regulation there are three grievance redressal

mechanisms a consumer can use to register their complaints which include the Toll Free Consumer Care Number, Appellate Authority for filing appeal in cases not satisfied with redressal of complaints and Web Based Complaint Monitoring System. The awareness about the toll free consumer care number is the highest with more than 97% of the total surveyed sample being aware about it. 7% of the total respondents were aware about the Appellate Authority while 5% of the respondents were aware about the Web Based Complaint Monitoring System.



5.2.1.1 Level of Satisfaction with the Action Taken on Complaints

- 24-40% of surveyed customers from each service provider have registered a complaint with the Toll Free Consumer Care number. More than 82% customers are satisfied against the action taken.
- Very few (less than 2%) customers have lodged complaint with Appellate Authority. More than 75% of such customers are found satisfied against the action taken.

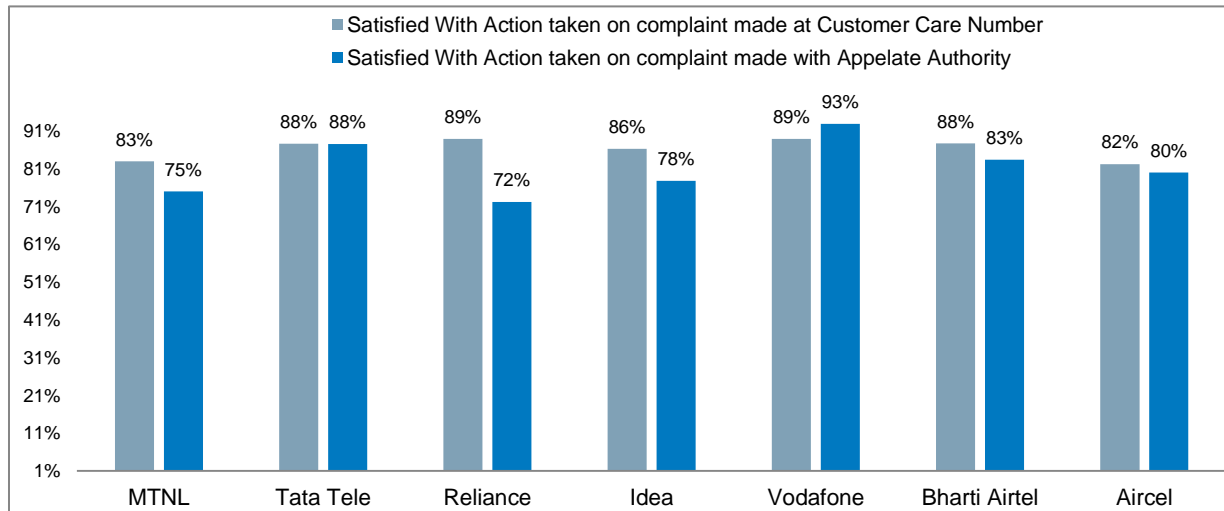


Table 5.3: Assessment of Telecom Consumers Complaint Redressal Regulations

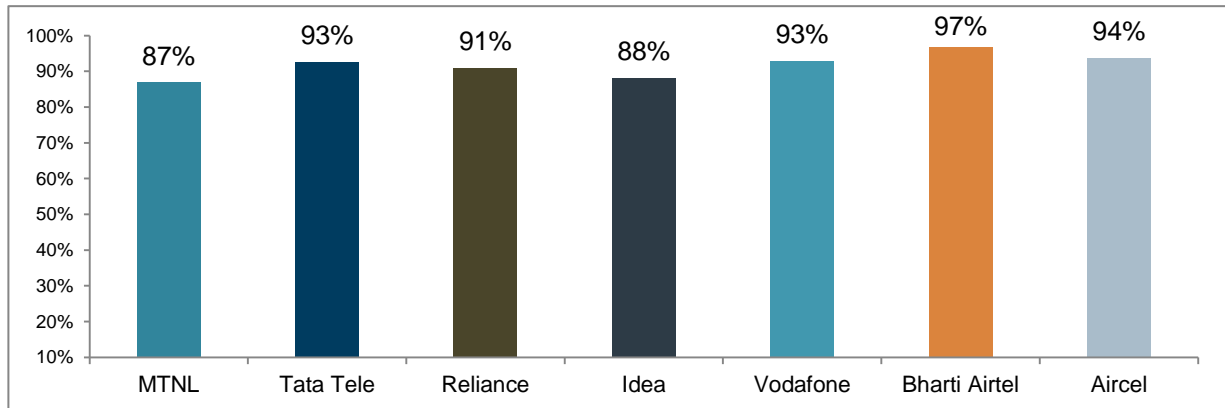
Particular	MTNL	Tata Tele	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Made complaint to the toll free Consumer Care Number	40%	40%	30%	37%	24%	27%	36%
Customers satisfied with the manner in which complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint	83%	88%	89%	86%	89%	88%	82%
Filed any appeal with the appellate authority	0.75%	1.50%	1.69%	1.69%	1.31%	1.12%	0.94%
Customers satisfied with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.	75%	88%	72%	78%	93%	83%	80%

Source: IMM Analysis

5.2.2 The Telecom Commercial Communications Customer Preference Regulations, 2010

The Telecom Commercial Communications Customer Preference Regulations, 2010 gives a telecom consumer the option of registering his/her mobile number for not receiving/blocking unsolicited commercial calls / SMSs. The consumer also has the option to register his number to be accessible to telemarketers of specific sectors. The telecom service providers have to ensure that such unsolicited calls/SMSs be blocked to the registered number with a specific time frame. In case the call/SMSs aren't stopped the telecom consumer may register a complaint on specific toll free numbers.

Satisfaction level with the effectiveness of registration for not receiving/blocking unsolicited calls/SMSs



- More than 87% of the customers of all service providers who had registered their number for not receiving / blocking unsolicited commercial calls / SMSs were satisfied with the effectiveness of the same.

5.2.2.1 Level of Satisfaction with the Action Taken on Complaints

- 94% of the customers of Idea were satisfied with the ease of lodging a complaint in case the unsolicited call/SMS being the highest amongst all the service providers.
- 89% and 88% of the customers of Idea and Tata respectively who had registered their complaint were satisfied with the action taken on their complaints, being the highest amongst all the service providers.

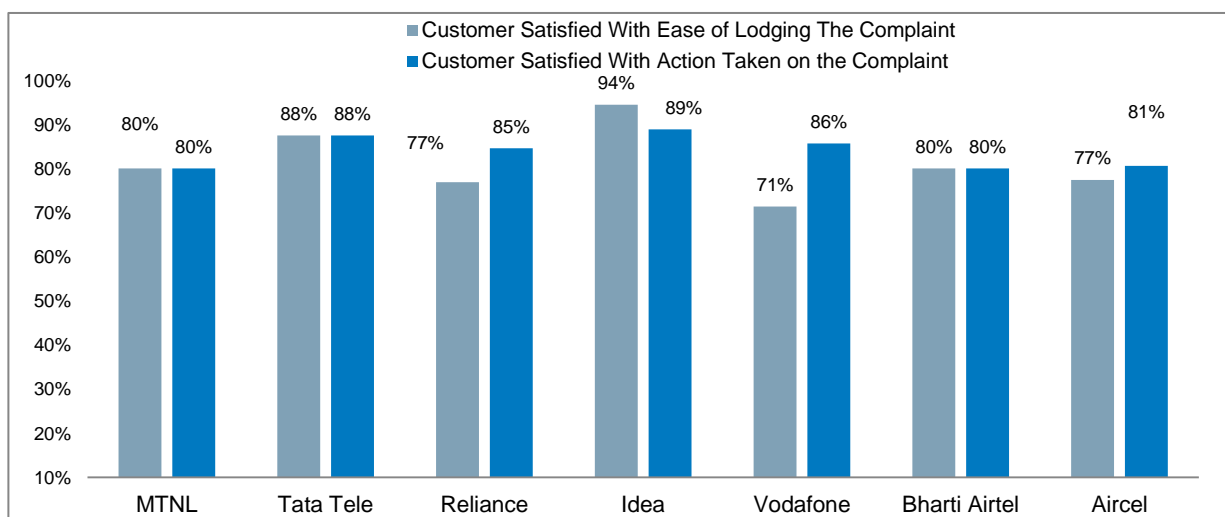


Table 5.4: Assessment of Telecom Commercial Communications Customer Preference Regulation

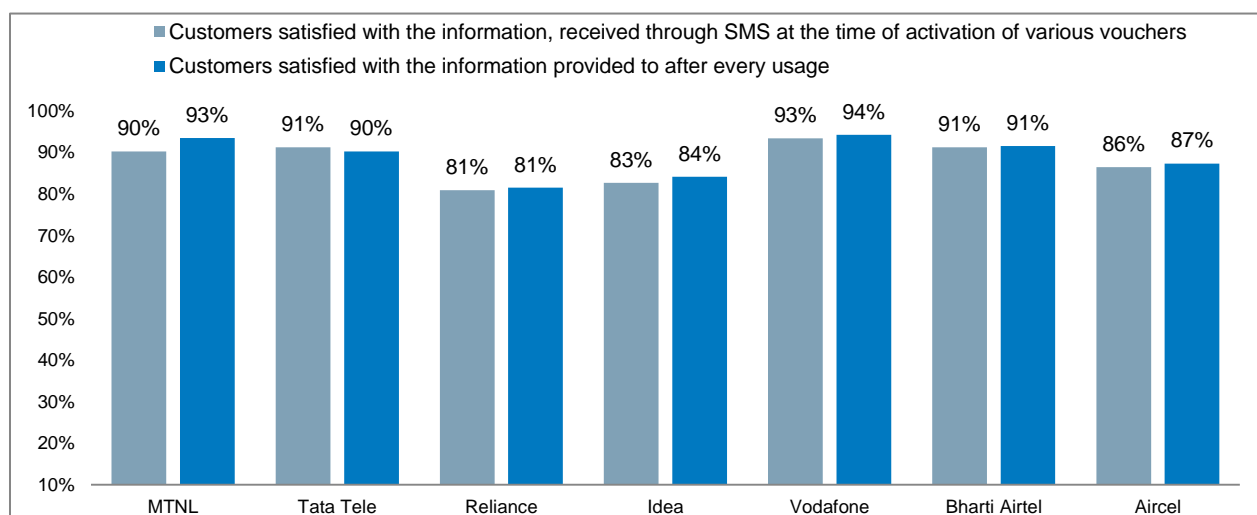
Particular	MTNL	Tata Tele	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Number registered for not receiving / blocking unsolicited commercial calls / SMSs	24%	27%	29%	29%	27%	30%	36%
Customers satisfied with the effectiveness of blocking of unsolicited commercial calls	87%	93%	91%	88%	93%	97%	94%
Registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same	2%	3%	4%	6%	5%	2%	8%
Customers satisfied with the ease of lodging the complaint	80%	88%	77%	94%	71%	80%	77%
Customers satisfied with the action taken on the complaint	80%	88%	85%	89%	86%	80%	81%

Source: IMM Analysis

5.2.3 Telecom Consumers Protection Regulations, 2012

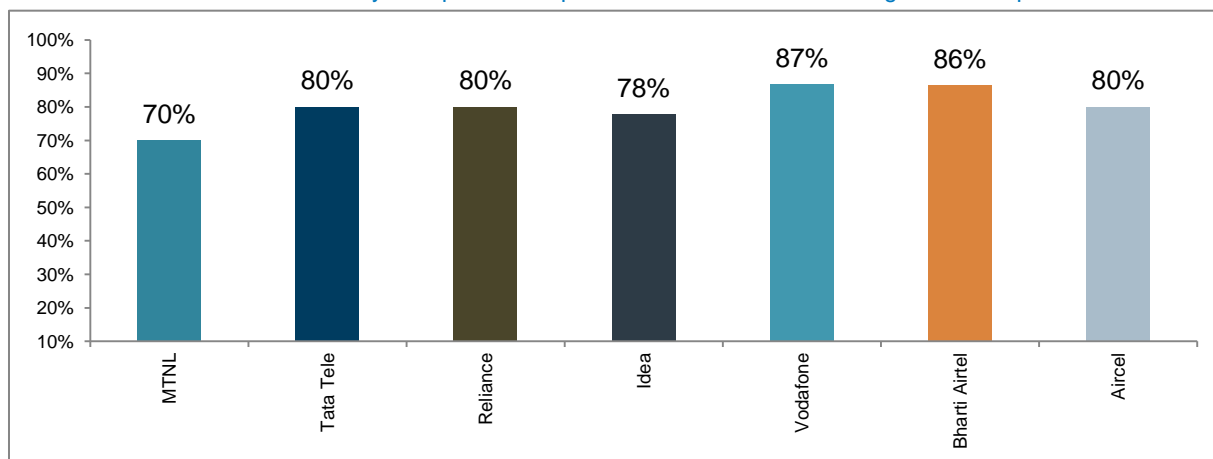
As per the Telecom Consumers Protection Regulations, 2012 every service provider has to, immediately on the activation of a voucher provide through SMS to the pre-paid consumer details such as amount charged, processing fee, taxes deducted, title of the plan, validity of the plan etc. The regulations also makes it mandatory for the service provider to immediately after a specific usage such as making a call, activation of value added services or internet data usage, send the customer details such as duration of call, charges deducted, balance in account etc.

More than 81% of the customers from all service providers are satisfied with the information, received through SMS at the time of activation of various vouchers. Vodafone has the highest level of satisfaction of 93% while only 81% of the surveyed Reliance consumers were satisfied with the information, received through SMS at the time of activation of various vouchers.



In case of information provided through SMS after every usage, such as duration of call, charges deducted, balance in account etc., more than 81% customers of all the service providers were satisfied.

Consumers satisfied with the timely receipt and completeness of the item-wise usage bill on request



Few pre-paid customers have requested an item-wise usage bill for their connection. The percentiles of such customers are in the range of 1-2% for each service provider. Amongst them the customers of Vodafone have the highest satisfaction level with 87% of the customers being satisfied with the timely receipt and completeness of the item-wise usage bill.

Table 5.5: Assessment of Telecom Consumer Protection Regulation

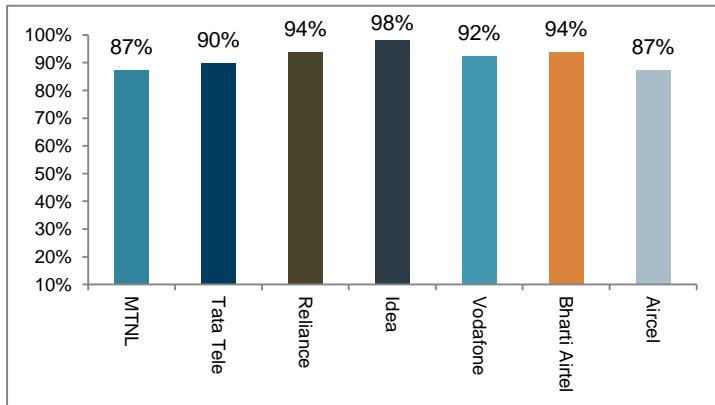
Particular	MTNL	Tata Tele	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Customers satisfied with the information, received through SMS at the time of activation of various vouchers, such as amount charged, processing fee, taxes deducted, title of the plan, validity etc.	90%	91%	81%	83%	93%	91%	86%
Customers satisfied with the information provided to you after every usage, such as duration of call, charges deducted, balance in account etc.	93%	90%	81%	84%	94%	91%	87%
Requested for an item-wise usage bill	2%	1%	1%	1%	2%	2%	0.49%
Customers satisfied with the timely receipt and completeness of the item-wise usage bill on request	70%	80%	80%	78%	87%	86%	80%

Source: IMM Analysis

5.2.4 Telecommunication Mobile Number Portability per Port Transaction Charge and Dipping Charge Regulations, 2009

As per the Telecommunication Mobile Number Portability per Port Transaction Charge and Dipping Charge Regulations, 2009 a consumer can retain his mobile telephone number when he moves from one Access Provider to another irrespective of the mobile technology or from one cellular mobile technology to another of the same Access Provider. The facility of retention of existing mobile telephone number despite moving to a new telecom service provider helps the subscriber maintain contact with his friends/clientele.

Satisfaction Level with the process of porting to another operator



- Few surveyed consumers have opted for Mobile Number Portability (MNP) with the percentage of such consumers ranging from 3% to 19% for all the service providers.

- 98% of the Idea and 94% of Airtel & Reliance consumers who had opted for MNP were satisfied with the process of porting to another operator, being the highest amongst all the service providers whereas in case of other service providers the satisfaction levels are in the range of 87-92%.

Table 5.6: Assessment of Telecommunication Mobile Number Portability Regulations

Particular	MTNL	Tata Tele	Reliance	Idea	Vodafone	Bharti Airtel	Aircel
Utilized the service of Mobile number portability for changing your operator	12%	10%	15%	5%	10%	3%	19%
Customers satisfied with the process of porting to another operator	87%	90%	94%	98%	92%	94%	87%

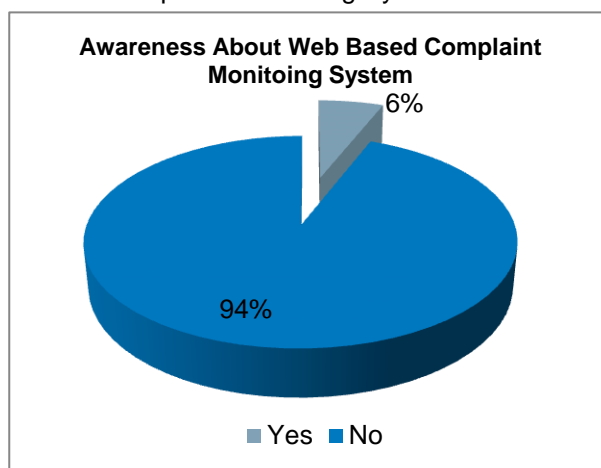
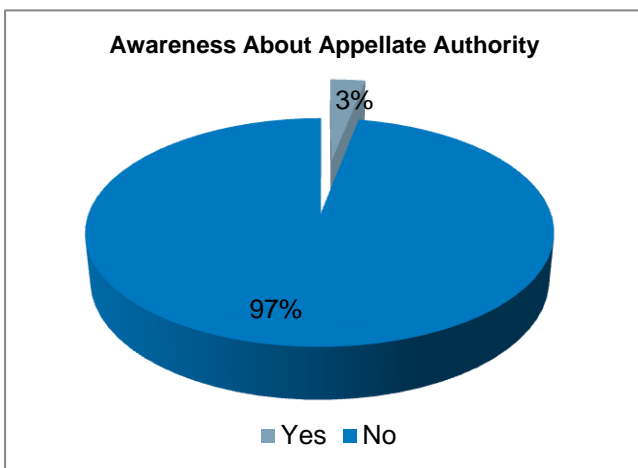
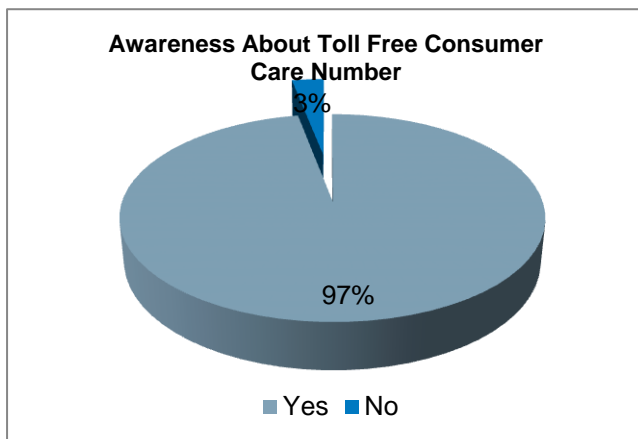
Source: IMM Analysis

5.3 Broadband Service

5.3.1 Telecom Consumers Complaint Redressal Regulations, 2012

As per the Telecom Consumers Complaint Redressal Regulation there are three grievance redressal mechanisms a consumer can use to register their complaints which include the Toll Free Consumer Care Number, Appellate Authority for filing appeal in cases not satisfied with redressal of complaints and Web Based Complaint Monitoring System.

The awareness about the toll free consumer care number is the highest with more than 97% of the total surveyed sample being aware about it. Around 3% of the total respondents were aware about the Appellate Authority while 6% of the respondents were aware about the Web Based Complaint Monitoring System.

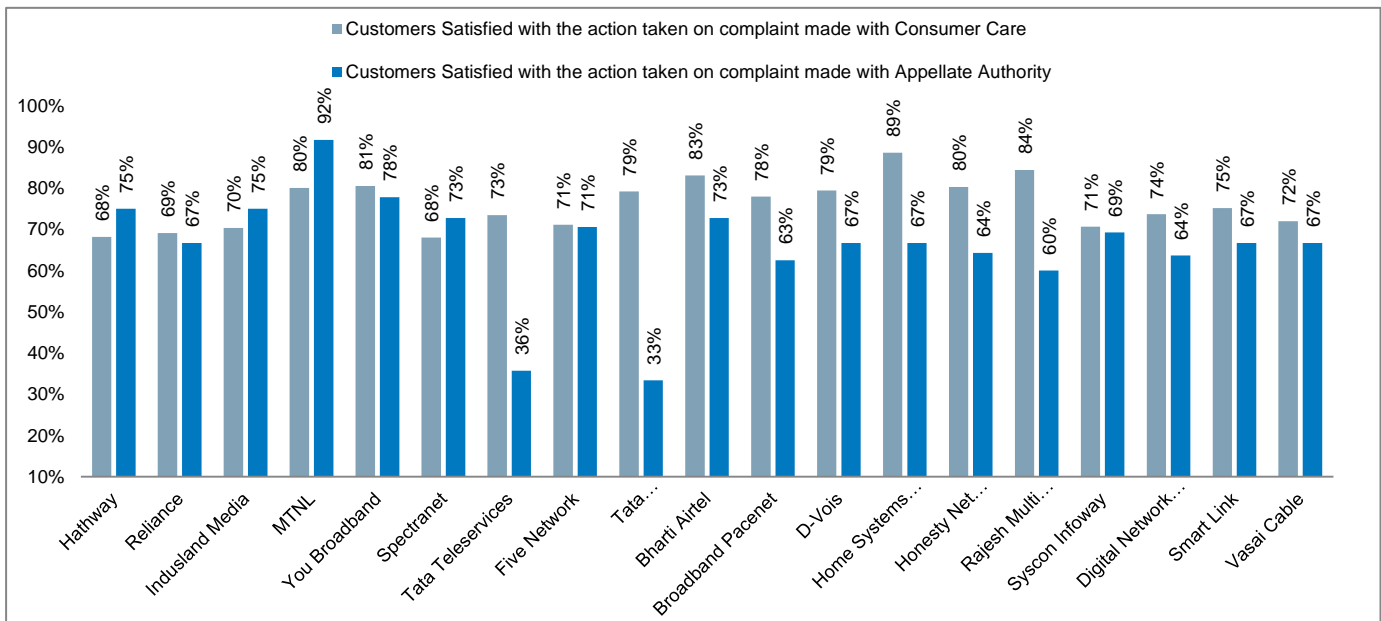


5.3.1.1 Level of Satisfaction with the Action Taken on Complaints

- 89% of surveyed customers of Home System Pvt Ltd. have been satisfied with registering a complaint with the Toll Free Consumer Care number, being the highest amongst all the service providers. On the other hand Hathway and Spectranet have the least percentage of satisfied surveyed consumers, being 68% who have registered a complaint with Toll Free Consumer Care number.

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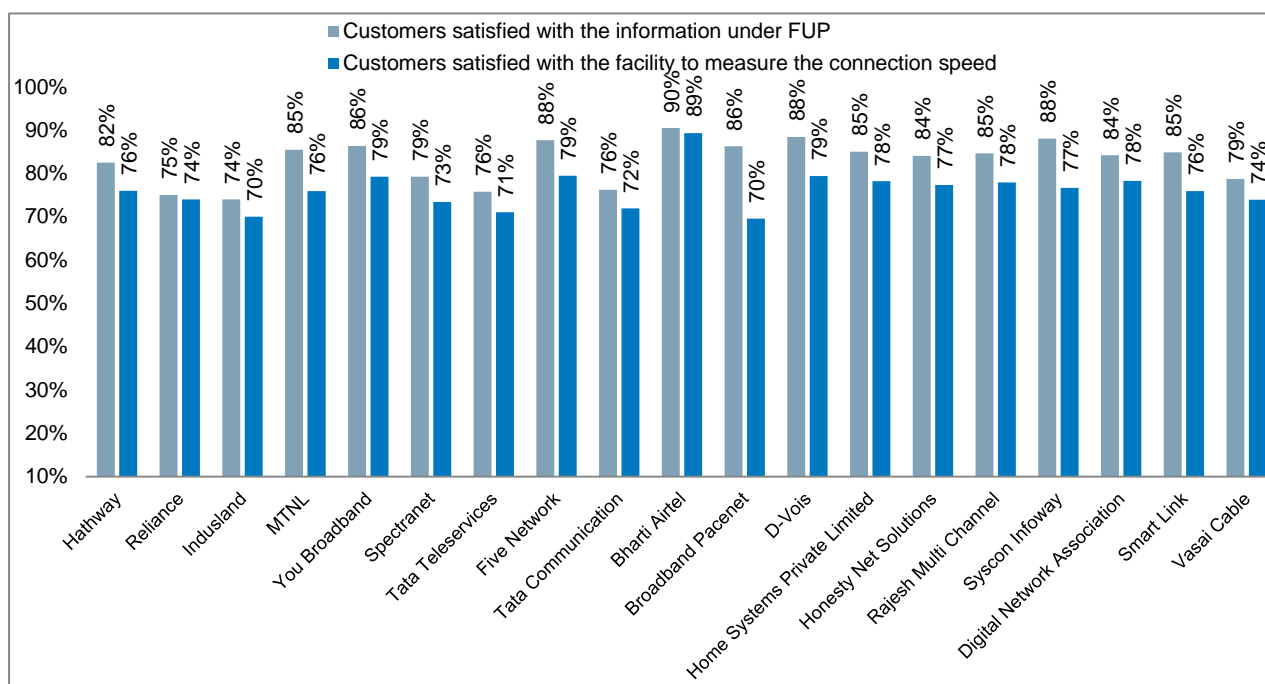
- 92% of surveyed customers of MTNL who have registered a complaint with the Appellate Authority are satisfied, being the highest amongst all the service providers.

Table 5.7: Assessment of Telecom Consumer Complaint Redressal Regulations

Service Provider	Made complaint to the toll free Consumer Care Number	Level of satisfaction with the manner in which complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint	Filed any appeal with the appellate authority	Level of satisfaction with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.
Hathway	50%	68%	1%	75%
Reliance	65%	69%	6%	67%
Indusland	64%	70%	2%	75%
MTNL	46%	80%	2%	92%
You Broadband	55%	81%	2%	78%
Spectranet	42%	68%	1%	73%
Tata Teleservices	59%	73%	1%	36%
Five Network	48%	71%	2%	71%
Tata Communication	52%	79%	1%	33%
Bharti Airtel	50%	83%	1%	73%
Broadband Pacenet	50%	78%	1%	63%
D-Vois	52%	79%	0%	67%
Home Systems Private Limited	58%	89%	0%	67%
Honesty Net Solutions	50%	80%	1%	64%
Rajesh Multi Channel	53%	84%	0%	60%
Syscon Infoway	47%	71%	2%	69%
Digital Network Association	48%	74%	1%	64%
Smart Link	47%	75%	0%	67%
Vasai Cable	58%	72%	1%	67%

Source: IMM Analysis

5.3.2 Directions Related To Fair Usage Policy and Measurement of Broadband Speed



- 90% of the surveyed customers of Bharti Airtel who had sought information under the fair usage policy are satisfied with the information given to them being the highest amongst all the service providers. However the overall satisfaction of the surveyed customers from all service providers is more than 74% with respect information provided under FUP.
- 89% of the surveyed customers of Airtel were satisfied with the facility to measure the broadband connection speed provided by the service provider, being the highest amongst all the service providers. However overall satisfaction with respect to facility to measure the broadband connection speed provided by each of the service provider surveyed is more than 70%.

Table 5.8: Assessment Directions Related to Fair Usage Policy and Measurement of Broadband Speed

Service Provider	Customers satisfied with the information, provided by the service provider under the fair usage policy (FUP) such as data usage limit with higher speed and speed of connection up to or beyond data usage limit	Customers satisfied with the facility to measure the broadband connection speed provided by the service provider
Hathway	82%	76%
Reliance	75%	71%
Indusland	74%	70%
MTNL	85%	76%
You Broadband	86%	79%
Spectranet	79%	73%
Tata Teleservices	76%	71%
Five Network	88%	79%
Tata Communication	76%	72%
Bharti Airtel	90%	89%

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Service Provider	Customers satisfied with the information, provided by the service provider under the fair usage policy (FUP) such as data usage limit with higher speed and speed of connection up to or beyond data usage limit	Customers satisfied with the facility to measure the broadband connection speed provided by the service provider
Broadband Pacenet	86%	70%
D-Vois	88%	79%
Home Systems Private Limited	85%	78%
Honesty Net Solutions	84%	77%
Rajesh Multi Channel	85%	78%
Syscon Infoway	88%	77%
Digital Network Association	84%	78%
Smart Link	85%	76%
Vasai Cable	79%	74%

Source: IMM Analysis

6 Conclusions & Recommendations

The key conclusions and recommendations on the basis of the survey conducted across all service categories and active service providers in the Mumbai circle in the West Zone are listed as under.

6.1 Basic Wire-Line

6.1.1.1 Quality of Service Benchmarks

- The survey results show that all service providers have met the quality of service benchmarks for the provision of service, billing performance, Network and Overall Quality parameters. While in case of the other parameters, few of the service providers could not to meet the benchmarks. In many cases service providers have marginally missed to reach the benchmark.
- Help services is the only parameter wherein many service providers have failed to achieve the stipulated benchmark.
- Based on the qualitative inputs from field staff and general observation during the survey period the consultants have observed that the satisfaction levels for the maintainability and help services parameter are a bit lower as compared to satisfaction percentiles for other parameters.

6.1.1.2 Assessment of Various Regulations

- The level of satisfaction with the effectiveness of blocking of unsolicited commercial calls/SMSs is moderate across all service providers.
- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number. Few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal.

6.2 Cellular Mobile

6.2.1.1 Quality of Service Benchmarks

- The survey results show that all service providers have met the quality of service benchmarks for the provision of service, Billing Performance-Pre-Paid, Maintainability and Overall Quality parameter. While in case of the other parameters, few of the service providers could not to meet the benchmarks. In many cases service providers have marginally missed to reach the benchmark.
- The satisfaction levels for the Help Services parameter are comparatively lower across all service providers.
- The service providers have performed well in cases of rest of the benchmarks such as Billing Performance: Post-Paid and Network with most of the service providers meeting or nearing the benchmark on these parameters.
- Based on the qualitative inputs from field staff and general observation during the survey period the consultants have observed that the satisfaction levels for the help services parameter is a bit lower as compared to satisfaction percentiles for other parameters.

6.2.1.2 Assessment of Various Regulations

- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number. Few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal.
- The level of satisfaction with the effectiveness of blocking of unsolicited commercial calls is well achieved across all service providers with the satisfaction percentiles in the range of 80-95% for all the service providers.
- Very few pre-paid customers have requested for an item-wise usage bill for their connection. Based on the qualitative inputs from field staff the consultants have observed that the awareness amongst the pre-paid customer with reference to this option with them is quite low.

6.3 Broadband

6.3.1.1 Quality of Service Benchmarks

- All the service providers have met the benchmarks for the provision of service parameter while in the other parameter few of the service providers have missed the benchmark. Many service providers have marginally missed the benchmark on many parameters.
- The satisfaction levels for the Help Services and Network parameters are comparatively lower as compared to other parameters.

6.3.1.2 Assessment of Various Regulations

- With reference to the grievance redressal mechanism the consumers are mainly aware of the toll free consumer care number. Very few consumers are aware of the Appellate Authority and the Web Based Monitoring System as a mechanism for grievance redressal and efforts should be made in generating awareness with respect to Appellate Authority and Web Based Monitoring System.
- The level of customers being satisfied with the manner in which their complaint with the toll free consumer care number was addressed is moderate.
- Customer satisfaction levels with respect to the information provided by the service provider under the fair usage policy (FUP) and the facility to measure the broadband connection speed provided by the service provider are more than 70%.

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Appendix A. Questionnaires

A.1 Basic Wireline Service

		TELECOM REGULATORY AUTHORITY OF INDIA							
		CUSTOMER PERCEPTION STUDY (West Zone)							
		(Basic Telephone Service)							
REF No.	CC	SR.No.	Interview Date			Interviewer's Name			
SDCA					Exchange				
Mode of Interview		1	In Person			2	Telephonic		
<p><i>Good morning/ afternoon/ evening. We are currently doing a survey on satisfaction among phone and broadband users. This survey is being carried out on behalf of Telecom Regulatory Authority Of India (TRAI), a body set up by the government so that customers like you get better services in future. We would appreciate if you could spare some of your valuable time to answer a few questions. Thank you.</i></p>									

CUSTOMER DETAILS													
Respondent's Name							Gender		1	Male	2	Female	
Age:	1	<25	2	25-34	3	35-44	4	>45	Area	1	Urban	2	Rural
Occupation	1	Service	2	Business/Self Employed			3	Student	4	Housewife	5	Retired	
Yearly Family/ House Hold Income	1	₹ <10,000	2	₹ 10,000-30,000	3	₹ 30,000-100,000	4	₹ >100,000	5	Not Provided			
Registered Customer's Name (If different from respondent)													
Address													
	District		State		STD Code					Tel No.			
Service Provider	1	BSNL		2	MTNL		3	Tata		4	Reliance		
	5	IDEA		6	Vodafone		7	Bharti Airtel		8	HFCL		
Usage Type	1	Residential		2	Commercial		User Type	1	Post Paid		2	Prepaid	

PERFORMANCE PERCEPTION OF ATTRIBUTES RELATED TO SERVICE QUALITY PARAMETERS
<p>In your opinion, how satisfied are you with your basic services in terms of following dimensions, on a scale of 1 to 7</p> <p style="text-align: center;">(1 = Extremely Dissatisfied, 7 = Extremely Satisfied)</p>

Parameters and Attributes				Ratings						
1. Provision of Service										
How satisfied are you with the ease of taking a connection? (EM 3)				1	2	3	4	5	6	7
How satisfied are you with the provision and understanding of all relevant information related to tariff plans & charges? (EM 1)				1	2	3	4	5	6	7
How satisfied are you with the availability of suitable plans/recharge vouchers as per your requirement? (TA 1)				1	2	3	4	5	6	7
2. Billing Related (Only for Prepaid Customers)										
How satisfied are you with ease of recharging process/activation of vouchers? (EM 4)				1	2	3	4	5	6	7
How satisfied are you with the availability of recharging cards/vouchers of various denominations?(EC 1)				1	2	3	4	5	6	7
How satisfied are you with the transparency of recharge offer/voucher i.e. talk time available on the recharge card/voucher? (RL 2)				1	2	3	4	5	6	7
How satisfied are you with the charges deducted for every call i.e. amount deducted on every usage? (EC 2)				1	2	3	4	5	6	7
Major complaints related to Billing (Prepaid)	1	High usage charges	2	Clarity on Waiver / Carry Forward Policy						
	3	Lack of Payment / Recharge option	4	Validity or reduction in benefits in case of hike in charges						
	5	Other (Pl. Specify)								
Billing Related (Only for Postpaid Customers)										
How satisfied are you with the charges levied per call? (EC2)				1	2	3	4	5	6	7
How satisfied are you with the overall accuracy & completeness of the bills? (RL 1)				1	2	3	4	5	6	7
How satisfied are you with the clarity of the bills in terms of transparency and understandability? (RL2)				1	2	3	4	5	6	7
Major complaints related to Billing (Postpaid)	1	Non – Receipt of Physical / E-copy of Bill		2	Timely receipt of Bill					
	3	Information not received about change in Plan Charges		4	Excess bill					
	5	Incomplete details		6	Lack of payment option					
	7	Other (Pl. Specify)								
3. Help Services										
How satisfied are you with the availability of customer care services (consumer care number and general information number)? (EM 5)				1	2	3	4	5	6	7
How satisfied are you with the ease of access to a customer care executive through the IVR menu? (CV1)				1	2	3	4	5	6	7
How satisfied are you with the customer friendly approach of the customer care executive? (RL 3)				1	2	3	4	5	6	7
How satisfied are you with the competency level/problem solving ability of the customer care executive? (AS 1)				1	2	3	4	5	6	7

4. NETWORK PERFORMANCE, RELIABILITY AND AVAILABILITY																	
How satisfied are you with the dial tone availability on your phone? (NT 1)							1	2	3	4	5	6	7				
How satisfied are you with the network of your service provider in terms of ability to make or receive calls easily? (NT2)							1	2	3	4	5	6	7				
How satisfied are you with the voice quality on your phone during calls? (NT3)							1	2	3	4	5	6	7				
5. Maintainability																	
How satisfied are you with the availability of fault free connection? (RS 2)							1	2	3	4	5	6	7				
How satisfied are you with the timely repair of faults of your phone connection? (RS 2)							1	2	3	4	5	6	7				
6. SUPPLEMENTARY SERVICES AND VALUE ADDED SERVICES																	
Have you subscribed to any supplementary services like call waiting/forwarding, voice mail / Value added services?							1	Yes		2	No						
If Yes, How satisfied are you with the supplementary services / value added service provided including activation, deactivation, charges etc? (CV 2)							1	2	3	4	5	6	7				
7. Overall Quality of the Telephone Service																	
Implementation and Effectiveness of various Regulations and Directions issued by TRAI																	
1. Have you registered your number for not receiving/blocking unsolicited commercial calls / SMSs?							1	Yes		2	No						
2. If Yes, how satisfied are you with the effectiveness of blocking of unsolicited commercial calls on your number?							1	2	3	4	5	6	7				
3. Have you ever registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same?							1	Yes		2	No						
4. If Yes, how satisfied are you with the ease of lodging the complaint?							1	2	3	4	5	6	7				
5. If Yes, how satisfied are you with the action taken on your complaint?							1	2	3	4	5	6	7				
6. Which all grievance redressal mechanisms set up by your telecom service provider based on the TRAI regulations are you aware of?																	
1	Toll Free Consumer Care Number for making complaints		2	Appellate Authority for filing appeal in case not satisfied with redressal of complaint			3	Web based complaint monitoring system									
7. Have you made any complaint to the toll free Consumer Care Number?							1	Yes		2	No						
8. If yes, how satisfied are you with the manner in which your complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint?							1	2	3	4	5	6	7				
9. Have you filed any appeal with the appellate authority?							1	Yes		2	No						
10. If yes, how satisfied are you with the manner in which your appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc..?							1	2	3	4	5	6	7				
How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means 'Extremely Likely' & 0 means 'Not At All Likely')							0	1	2	3	4	5	6	7	8	9	10

***** Thank You *****

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A.2 Cellular Service

REF No.		CC	SR. No.	Interview Date	Interviewer's Name						
Mode of Interview		1	In Person	2	Telephonic						
<p><i>Good morning/ afternoon/ evening. We are currently doing a survey on satisfaction among phone and broadband users. This survey is being carried out on behalf of Telecom Regulatory Authority Of India (TRAI), a body set up by the government so that customers like you get better services in future. We would appreciate if you could spare some of your valuable time to answer a few questions. Thank you.</i></p>											
CUSTOMER DETAILS											
Respondent's Name			Gender		1 Male 2 Female						
Age	1 <25	2 25-34	3 35-44	4 >45	Area 1 Urban 2 Rural						
Occupation	1 Service	2 Business/Self Employed	3 Student	4 Housewife	5 Retired						
Yearly Family/ House Hold Income	1 ₹ <10,000	2 ₹ 10,000-30,000	3 ₹ 30,000-100,000	4 ₹ >100,000	5 Not Provided						
Registered Customer's Name (If different from respondent)											
Addresses											
District		State		Mobile No.							
Service Provider	1 BSNL	2 MTNL	3 Tata	4 Reliance							
	5 IDEA	6 Vodafone	7 Bharti Airtel	8 Uninor							
	9 Aircel	10 Videocon	11 Loop	12 Sistema Shyam							
Usage Type	1 Residential	2 Commercial	User Type	1 Post Paid	2 Pre-Paid						
PERFORMANCE PERCEPTION OF ATTRIBUTES RELATED TO SERVICE QUALITY PARAMETERS											
In your opinion, how satisfied are you with your cellular services in terms of following dimensions, on a scale of 1 to 7 (1 = Extremely Dissatisfied, 7 = Extremely Satisfied)											
Parameters and Attributes					Ratings						
1. Provision of Service											
How satisfied are you with the ease of activating a connection? (EM 3)					1	2	3	4	5	6	7
How satisfied are you with the understanding of all relevant information related to tariff plans & charges? (EM 1)					1	2	3	4	5	6	7
How satisfied are you with the availability of suitable plans/ recharge vouchers such as top-up, special tariff voucher, combo voucher, plan voucher as per your requirement? (TA 1)					1	2	3	4	5	6	7
2. Billing Related (Only for Prepaid Customers)											
How satisfied are you with ease of activation of vouchers (recharging process)? (EM 4)					1	2	3	4	5	6	7
How satisfied are you with the availability of vouchers (recharge coupons) of various denominations? (EC 1)					1	2	3	4	5	6	7
How satisfied are you with the transparency of information provided on vouchers i.e. talk time available on the vouchers and restrictions if any? (RL 2)					1	2	3	4	5	6	7
How satisfied are you with the charges deducted after every usage? (EC 2)					1	2	3	4	5	6	7
Major complaints related to Billing	1	High usage charges		2	Clarity on Waiver / Carry Forward Policy						
	3	Lack of Payment / Recharge option		4	Validity or reduction in benefits in case of hike in charges						
	5	Other (Pl. Specify)									

Billing Related (Only for Postpaid Customers)														
How satisfied are you with the charges levied per call? (EC2)								1	2	3	4	5	6	7
How satisfied are you with the overall accuracy & completeness of the bills? (RL 1)								1	2	3	4	5	6	7
How satisfied are you with the clarity of the bills in terms of transparency and understandability? (RL2)								1	2	3	4	5	6	7
Major complaints related to Billing	1	Non – Receipt of Physical / E-copy of Bill					2	Timely receipt of Bill						
	3	Information not received about change in Plan Charges					4	Excess bill						
	5	Incomplete details	6	Lack of payment option			5	Incomplete details						
	8	Other (Pl. Specify)												
3. Help Services														
How satisfied are you with the availability of customer care services (consumer care number and general information number)? (EM 5)								1	2	3	4	5	6	7
How satisfied are you with the ease of access to a customer care executive through the IVR menu?(CV1)								1	2	3	4	5	6	7
How satisfied are you with the customer friendly approach of the customer care executive? (RL 3)								1	2	3	4	5	6	7
How satisfied are you with the competency level/problem solving ability of the customer care executive?								1	2	3	4	5	6	7
4. Network Performance, Reliability and Availability														
How satisfied are you with the availability of signal of your service provided? (NT 1)								1	2	3	4	5	6	7
How satisfied are you with the network of your service provider in terms of ability to make or receive calls easily? (NT2)								1	2	3	4	5	6	7
How satisfied are you with the voice quality on your phone during calls? (NT3)								1	2	3	4	5	6	7
5. Maintainability														
How satisfied are you with the availability of fault free connection? (RS 2)								1	2	3	4	5	6	7
How satisfied are you with the timely repair of faults of your phone connection? (RS 2)								1	2	3	4	5	6	7
6. Supplementary Services and Value Added Services														
Have you subscribed to any supplementary services like call forwarding, call diverting and value added services like ring tone, alerts, GPRS, e-mail, voice mail or any other such services, in the last 6 months?								1	Ye s		2	No		
If Yes, How satisfied are you with the supplementary services / value added service provided including activation, deactivation, charges etc? (CV 2)								1	2	3	4	5	6	7
7. Mobile Data/Internet Services														
Do you use data/internet services offered by your operator on your mobile device? (CV 3)								1	Ye s		2	N o		
If Yes, How satisfied are you with speed of data connection? (CV 4)								1	2	3	4	5	6	7
8. Wireless USB Dongle														
Do you use a wireless USB dongle device (For e.g. Tata Photon, etc.) for accessing internet?								1	Ye s		2	N o		
If Yes, How satisfied are you with coverage and availability of internet connection on your wireless USB dongle device?								1	2	3	4	5	6	7

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9. Overall Quality of the Telephone Service										1	2	3	4	5	6	7				
Implementation and Effectiveness of various Regulations and Directions issued by TRAI																				
1. Have you registered your number for not receiving/blocking unsolicited commercial calls / SMSs?										1	Yes		2	No						
2. If Yes, how satisfied are you with the effectiveness of blocking of unsolicited commercial calls on your number?										1	2	3	4	5	6	7				
3. Have you ever registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same?										1	Yes		2	No						
4. If Yes, how satisfied are you with the ease of lodging the complaint?										1	2	3	4	5	6	7				
5. If Yes, how satisfied are you with the action taken on your complaint?										1	2	3	4	5	6	7				
Question Number 6-9 are for Prepaid Customers Only																				
6. How satisfied are you with the information, received through SMS at the time of activation of various vouchers, such as amount charged, processing fee, taxes deducted, title of the plan, validity etc?										1	2	3	4	5	6	7				
7. How satisfied are you with the information provided to you after every usage, such as duration of call, charges deducted, balance in account etc?										1	2	3	4	5	6	7				
8. A prepaid customer can get an item-wise usage bill within 45 days of making such request. Have you ever requested for it?										1	Yes		2	No						
9. If Yes, how satisfied are you with the timely receipt and completeness of the item-wise usage bill on request?										1	2	3	4	5	6	7				
10. Which all grievance redressal mechanisms set up by your telecom service provider based on the TRAI regulations are you aware of?																				
1	Toll Free Consumer Care Number for making complaints			2	Appellate Authority for filing appeal in case not satisfied with redressal of complaint			3	Web based complaint monitoring system											
11. Have you made any complaint to the toll free Consumer Care Number?										1	Yes		2	No						
12. If yes, how satisfied are you with the manner in which your complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint?										1	2	3	4	5	6	7				
13. Have you filed any appeal with the appellate authority?										1	Yes		2	No						
14. If yes, how satisfied are you with the manner in which your appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc..?										1	2	3	4	5	6	7				
15. Have you utilized the service of Mobile number portability for changing your operator?										1	Yes		2	No						
16. If Yes, are you satisfied with the process of porting to another operator?										1	2	3	4	5	6	7				
How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means ' Extremely Likely ' & 0 means ' Not At All Likely ')										0	1	2	3	4	5	6	7	8	9	10

***** Thank You *****

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A.3 Broadband Service

REF No.		CC	SR.No.	Interview Date	Interviewer's Name											
POP				Mode of Interview	1	In Person	2	Telephonic	3	E-mail	4	Web/Online				
<p><i>Good morning/ afternoon/ evening. We are currently doing a survey on satisfaction among phone and broadband users. This survey is being carried out on behalf of Telecom Regulatory Authority Of India (TRAI), a body set up by the government so that customers like you get better services in future. We would appreciate if you could spare some of your valuable time to answer a few questions. Thank you.</i></p>																
CUSTOMER DETAILS																
Respondent's Name			Gender						1	Male	2	Female				
Age:	1	<25	2	25-34	3	35-44	4	>45	Area	1	Urban	2	Rural			
Occupation	1	Service	2	Business/Self Employed			3	Student	4	Housewife	5	Retired				
Yearly Family/ House Hold Income	1	₹ <10,000	2	₹ 10,000-30,000	3	₹ 30,000-100,000	4	₹ >100,000	5	Not Provided						
Registered Customer's Name (if different from respondent)																
Address																
District			State													
STD Code						Tel. No										
Service Provider		1	BSNL				9	MTNL		17	Tata Communication					
		2	Hathaway				10	You Broadband		18	Broadband Pacenet					
		3	Siti Cable				11	Tata Teleservices		19	Syscon Infoway					
		4	Reliance				12	Five Network		20	Noida Software Technology Park					
		5	Sify				13	Chandranet		21	Softgen Computers					
		6	Spectra Net				14	Bharti Airtel		22	Rajesh Multichannel					
		7	Tikona				15	Indusland Media		23	Zylog Systems					
		8	Gujarat Telelink				16	Vasai Cable								
Usage Type	1	Residential		2	Commercial		Usage Type	1	Post Paid		2	Pre Paid				
PERFORMANCE PERCEPTION OF ATTRIBUTES RELATED TO SERVICE QUALITY PARAMETERS																
<p>In your opinion, how satisfied are you with your broadband services in terms of following dimensions, on a scale of 1 to 7 (1 = Extremely Dissatisfied, 7 = Extremely Satisfied)</p>																
Parameters and Attributes										Ratings						
1. Provision of Service																
How satisfied are you with the ease of taking a connection? (EM 3)										1	2	3	4	5	6	7
How satisfied are you with the provision and understanding of all relevant information related to tariff plans & charges? (EM 1)										1	2	3	4	5	6	7

How satisfied are you with the availability of suitable plans/recharge vouchers as per your requirement? (TA 1)							1	2	3	4	5	6	7	
2. Billing Related (Only for Prepaid Customers)														
How satisfied are you with ease of recharging process/activation of vouchers? (EM 4)							1	2	3	4	5	6	7	
How satisfied are you with the availability of recharging cards/voucher of various denominations? (EC 1)							1	2	3	4	5	6	7	
How satisfied are you with the transparency of recharge offer/voucher i.e. internet usage available on the recharge card? (RL 2)							1	2	3	4	5	6	7	
How satisfied are you with the charges deducted for internet usage? (EC 2)							1	2	3	4	5	6	7	
Major complaints related to Billing	1	High usage charges				2	Clarity on Waiver / Carry Forward Policy							
	3	Lack of Payment / Recharge option				4	Validity or reduction in benefits in case of hike in charges							
	5	Other (Pl. Specify)												
Billing Related (Only for Postpaid Customers)														
How satisfied are you with the charges levied for every internet usage? (EC2)							1	2	3	4	5	6	7	
How satisfied are you with the overall accuracy & completeness of the bills? (RL 1)							1	2	3	4	5	6	7	
How satisfied are you with the clarity of the bills in terms of transparency and understandability? (RL2)							1	2	3	4	5	6	7	
Major complaints related to Billing	1	Non – Receipt of Physical / E-copy of Bill				2	Timely receipt of Bill							
	3	Information not received about change in Plan Charges				4	Excess bill							
	5	Incomplete details		6	Lack of payment option		5	Incomplete details						
	8	Other (Pl. Specify)												
3. Help Services														
How satisfied are you with the availability of customer care services (consumer care number and general information number)? (EM 5)							1	2	3	4	5	6	7	
How satisfied are you with the ease of access to a customer care executive through the IVR menu? (CV1)							1	2	3	4	5	6	7	
How satisfied are you with the customer friendly approach of the customer care executive? (RL 3)							1	2	3	4	5	6	7	
How satisfied are you with the competency level/problem solving ability of the customer care executive? (AS 1)							1	2	3	4	5	6	7	
4. NETWORK PERFORMANCE, RELIABILITY AND AVAILABILITY														
How satisfied are you with the availability of signal of your service provider? (NT 1)							1	2	3	4	5	6	7	
How satisfied are you with the network of your service provider in terms speed of broadband connection? (NT2)							1	2	3	4	5	6	7	
5. Maintainability														
How satisfied are you with the time for which service is up and working? (NT3)							1	2	3	4	5	6	7	
How satisfied are you with the timely repair of faults of your connection? (RS 2)							1	2	3	4	5	6	7	
6. SUPPLEMENTARY SERVICES AND VALUE ADDED SERVICES														
Have you subscribed to any supplementary services such as Static/fixed IP addresses, e-mail id's etc.?							1	Ye		2	No			

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		s						
If Yes, how satisfied are you with quality of these supplementary services including activation, deactivation, charges etc? (CV 2)		1	2	3	4	5	6	7
7. Overall Quality of the Telephone Service		1	2	3	4	5	6	7
Implementation and Effectiveness of various Regulations and Directions issued by TRAI								
1. Which all grievance redressal mechanisms set up by your telecom service provider based on the TRAI regulations are you aware of?								
1	Toll Free Consumer Care Number for making complaints	2	Appellate Authority for filing appeal in case not satisfied with redressal of complaint			3	Web based complaint monitoring system	
2. Have you made any complaint to the toll free Consumer Care Number?		1	Yes			2	N o	
3. If yes, how satisfied are you with the manner in which your complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint?		1	2	3	4	5	6	7
4. Have you filed any appeal with the appellate authority?		1	Yes			2	N o	
5. If yes, how satisfied are you with the manner in which your appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc..?		1	2	3	4	5	6	7
6. How satisfied are you with the information, provided by your service provider under the fair usage policy (FUP) such as data usage limit with higher speed and speed of connection up to or beyond data usage limit?		1	2	3	4	5	6	7
7. How satisfied are you with the facility to measure the broadband connection speed provided by your service provider?		1	2	3	4	5	6	7

How likely is it that you would recommend your service provider to your relatives or friends? (On scale of 0 to 10, where 10 means ' Extremely Likely ' & 0 means ' Not At All Likely ')	0	1	2	3	4	5	6	7	8	9	10
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***** Thank You *****