



Final Report - West Zone (Gujarat)

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
December 2014

Telecom Regulatory Authority of India (TRAI)

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December 2014

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 Gujarat Circle.

Executive Summary

Gujarat: Circles & Coverage Areas

In the first 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 0.1: Circles & Coverage Area

Circle	Regions for Cellular*	Regions for Basic Wire-Line	Regions for Broadband
Gujarat	Ahmedabad Vadodara Surat Bhavnagar Jamnagar Junagadh	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

Gujarat: 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

Gujarat Circle: Comparisons with Quality of Service Benchmarks

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

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Gujarat: Basic Wire-Line

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

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	≥90%	95%	96%	90%	98%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	-	-	-	-
Customer Satisfied With Billing Performance – Post-Paid	≥95%	96%	96%	95%	97%
Customer Satisfied With Help Services	≥90%	94%	96%	92%	97%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	94%	94%	90%	94%
Customer Satisfied With Maintainability	≥95%	94%	94%	91%	93%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	89%	85%	88%	91%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	90%	90%	90%	91%

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 achieve the benchmark.
- Help services is the only parameter wherein many service providers have failed to achieve the stipulated benchmark. Airtel has achieved the benchmark followed by Tata, BSNL 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 91% of the consumers being satisfied on the parameter. All other service providers have been able to achieve 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 BSNL 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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Gujarat: Cellular Mobile

Performance Compliance-Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Customer Satisfied With Provision of Service	≥90%	97%	97%	98%	97%	96%	94%	96%	94%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	96%	98%	97%	99%	96%	96%	98%	95%
Customer Satisfied With Billing Performance – Post-Paid	≥95%	96%	96%	95%	98%	96%	95%	-	-
Customer Satisfied With Help Services	≥90%	93%	96%	94%	97%	95%	95%	92%	94%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	90%	91%	91%	93%	93%	91%	89%	86%
Customer Satisfied With Maintainability	≥95%	94%	97%	95%	97%	96%	93%	94%	92%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	90%	85%	88%	89%	87%	87%	85%	84%
Customer Satisfied With Mobile Data/Internet Services	≥90%	84%	87%	84%	87%	88%	89%	81%	85%
Customer Satisfied With Wireless USB Dongle	≥90%	76%	82%	86%	91%	83%	83%	82%	85%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	93%	92%	91%	97%	93%	92%	91%	93%

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 have been by all service providers with highest level of satisfaction in case of Idea and the lowest being 92% in case of Uninor.
- All 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 are comparatively lower as compared to satisfaction percentiles for other parameters.

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 98% 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 90-95% for all the service providers.
- Very few pre-paid customers (less than 5%) 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.
- Number portability is observed highest in case of Vodafone followed by Idea and Reliance.

Gujarat: Broadband

Performance Compliance-Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Customers satisfied with the provision of service	>90%	96%	93%	90%	95%	97%	91%	99%	95%	93%	91%
Customers satisfied with the billing performance: Pre-Paid	>90%	-	94%	-	95%	96%	91%	-	100%	91%	91%
Customers satisfied with the billing performance: Post-Paid	>90%	97%	-	91%	-	97%	-	99%	93%	91%	90%
Customers satisfied with help services	>90%	95%	75%	73%	82%	89%	84%	97%	89%	77%	86%
Customers satisfied with network performance, reliability and availability	>85%	91%	85%	81%	90%	89%	81%	96%	90%	81%	88%
Customers satisfied with maintainability	>85%	96%	86%	81%	86%	88%	78%	96%	91%	83%	86%
Customers satisfied with supplementary services	>85%	84%	83%	83%	85%	84%	80%	86%	89%	86%	84%
Overall Customer Satisfaction	>85%	93%	89%	86%	87%	91%	87%	95%	86%	89%	88%

Quality of Service Benchmarks

- Airtel has achieved the benchmarks for all the parameters in the broadband category.
- 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 Supplementary Services are comparatively lower as compared to other parameters. Airtel and BSNL have met the benchmark for the help service parameter while the rest have satisfaction percentiles in the range of 75-89%. However all service providers have met the Overall Customer Satisfaction benchmark of 90%.

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 96% 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

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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 70-88%.
- 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 Regulations

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 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 through surveys in West Zone. The West Zone comprises of 4 Circles – Gujarat, 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.

1.1 Circles & Coverage Areas

In the first 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
Gujarat	Ahmedabad	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
	Vadodara		
	Surat		
	Bhavnagar		
	Jamnagar		
	Junagadh		
Madhya Pradesh & Chhattisgarh	Satna	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
	Indore		
	Jabalpur		
	Bhopal		
	Ratlam		
	Durg		
	Raipur		

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 Gujarat and Madhya Pradesh circles in the first half yearly period. In the second half yearly period the consultants has to cover Mumbai and Maharashtra circles. This report presents the results of the survey conducted for the Gujarat 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) and Cellular Mobile Telephone Service as defined in the above mentioned regulations are as below

Table 2.1: Parameters and Benchmarks for Basic Telephone Service

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

The parameters and benchmarks for Cellular Service as defined in the above mentioned regulations are as below

Table 2.2: Parameters and Benchmarks for Cellular Mobile Service

Sr. No.	Parameter	Benchmark
1	Customers satisfied with the provision of service	≥90%
2	Customers satisfied with the billing performance	≥95%
3	Customers satisfied with network performance, reliability and availability	≥95%
4	Customers satisfied with maintainability	≥95%
5	Customers satisfied with supplementary and value added services	≥90%
6	Customers satisfied with Mobile Data/Internet service	≥90%
7	Customers satisfied with wireless USB dongle services	≥90%
8	Customers satisfied with help services including customer grievance redressal	≥90%
9	Customers satisfied with overall service quality	≥90%

The parameters and benchmarks for Broadband Service as defined in the above mentioned regulations are as below

Table 2.3: Parameters and Benchmarks for Broadband Service

Sr. No.	Parameter	Benchmark
1	Customers satisfied with the provision of service	>90%
2	Customers satisfied with the billing performance	>90%
3	Customers satisfied with help services	>90%
4	Customers satisfied with network performance, reliability and availability	>85%
5	Customers satisfied with maintainability	>85%
6	Overall Customer Satisfaction	>85%
7	Customers satisfied with supplementary services	>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 Gujarat 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
Gujarat	33	Ahmedabad
		Surat
		Vadodara
		Bhavnagar
		Jamnanagar
		Junagadh

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	Remarks
Gujarat	BSNL	1067	1067	-
Gujarat	Tata	1067	413	Due to less no. of subscribers
Gujarat	Reliance	1067	1067	-
Gujarat	Bharti Airtel	1067	1067	-

Table 3.4: Cellular Sample Size

Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Gujarat	BSNL	1067	1067
Gujarat	Tata	1067	1067
Gujarat	Reliance	1067	1067
Gujarat	Idea	1067	1067
Gujarat	Vodafone	1067	1067
Gujarat	Airtel	1067	1067
Gujarat	Uninor	1067	1067
Gujarat	Videocon	1067	1067

Table 3.5: Broadband Services Sample Size

Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Gujarat	BSNL	1067	1067

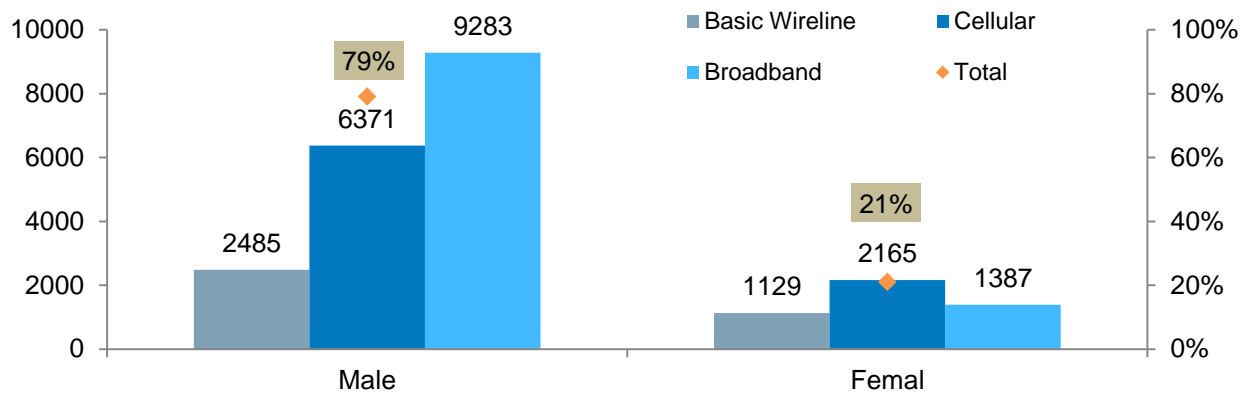
Circle	Service Provider	Sample Size As Per TOR	Sample Size Achieved
Gujarat	Hathway	1067	1067
Gujarat	Reliance	1067	1067
Gujarat	Gujarat Telelink	1067	1067
Gujarat	You Broadband	1067	1067
Gujarat	Tata Teleservice	1067	1067
Gujarat	Chandranet	1067	1067
Gujarat	Bharti Airtel	1067	1067
Gujarat	Tata Communications	1067	1067
Gujarat	Broadband Pacenet	1067	1067

3.6 Sample Characteristics

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

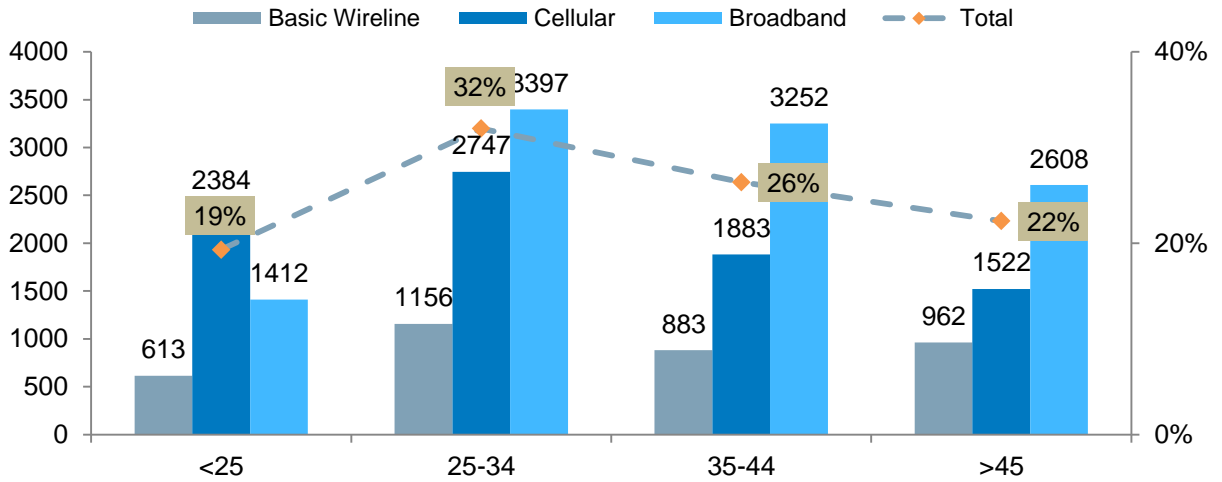
3.6.1 Gender

Figure 3.1: Gender Mix



3.6.2 Age

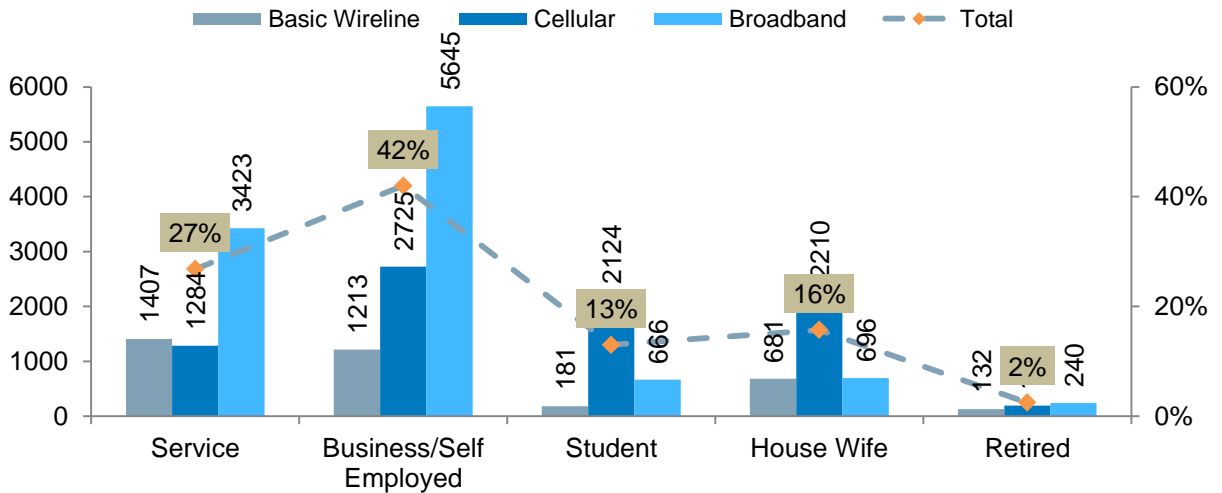
Figure 3.2: Age Group Mix



- 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 32% in total sample size followed by 35-44 years, greater than 45 years and less than 25 years.

3.6.3 Occupation

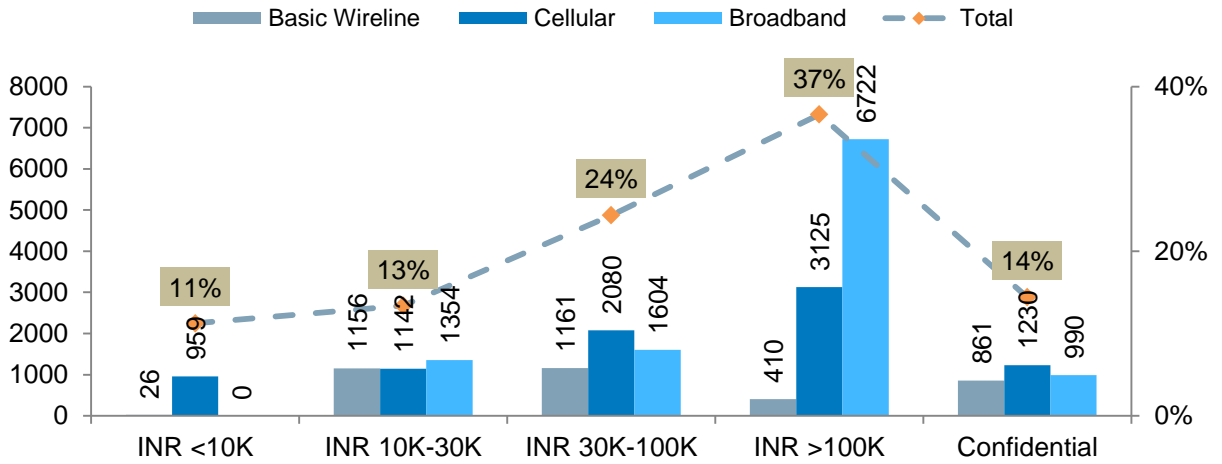
Figure 3.3: Occupation & Sample size



- It can be observed that the Business / Self-employed respondents are leading in all cases with respect to the survey conducted.
- The proportion of Business / Self-employed respondents is 42% in total sample size followed by service class and housewives.

3.6.4 Income Group

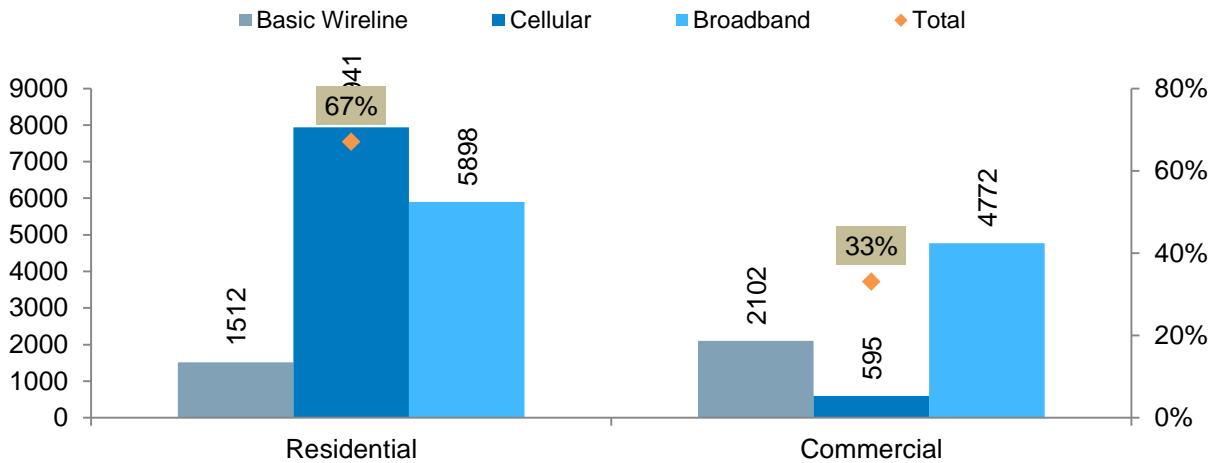
Figure 3.4: Income Group & Sample size



- It can be observed that majority of the respondents in case of all three service providers are from income group greater than Rs. 1,00,000. However there are in total 14% respondents who have not informed their income.

3.6.5 Usage Type

Figure 3.5: Usage Type & Sample size



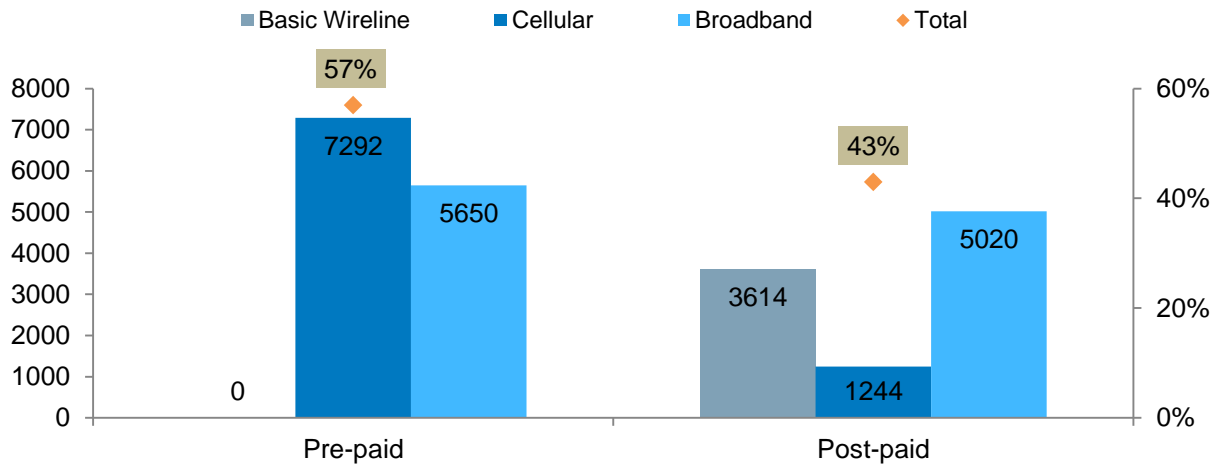
It can be observed that 2/3rd respondents from all services have commercial usage of the service.

3.6.6 Connection Type

Figure 3.6: Connection Type & Sample size

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It can be observed that more than 55% 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.

Majority of the cellular service consumers have prepaid connection while almost 50% consumers of broadband services have prepaid and post-paid 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 Gujarat Circle - Performance Compliance

4.1.1 Basic Wire-line Service

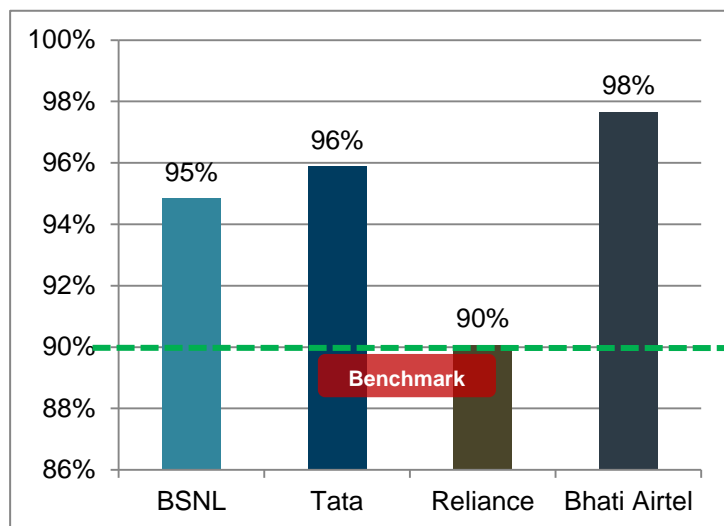
The performance compliance of the service providers for the basic wire-line service is as given below

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

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	≥90%	95%	96%	90%	98%
Customer Satisfied With Billing Performance – Pre-Paid	≥95%	-	-	-	-
Customer Satisfied With Billing Performance – Post-Paid	≥95%	96%	96%	95%	97%
Customer Satisfied With Help Services	≥95%	94%	96%	92%	97%
Customer Satisfied With Network Performance, Reliability and Availability	≥95%	94%	94%	90%	94%
Customer Satisfied With Maintainability	≥90%	94%	94%	91%	93%
Customer Satisfied With Supplementary Services and Value Added Services	≥90%	89%	85%	88%	91%
Customer Satisfied With Overall Quality of Telephone Service	≥90%	90%	90%	90%	91%

Source: IMM Analysis

4.1.1.1 Provision of Service



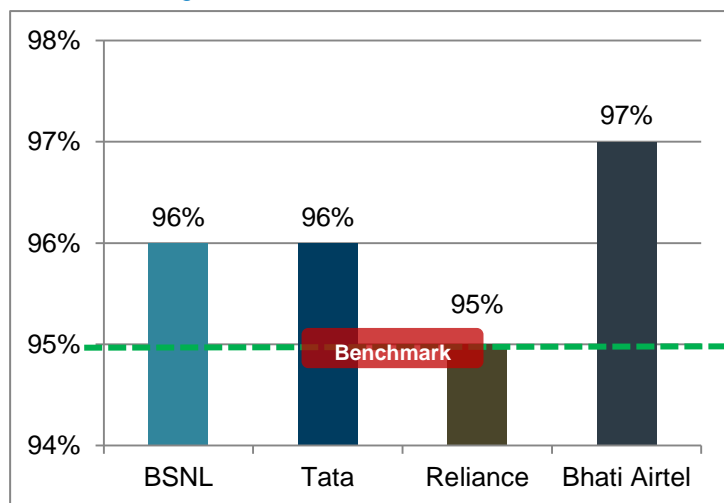
The benchmark for the Provision of Service parameter is that of >90% of the customers being satisfied on the parameter. All the four service providers have met the benchmark for the provision of service parameter. In case of Bharti Airtel 98% of the customers, in case of BSNL and Tata 95% and 96% respectively and in case of Reliance 90% of the customers are satisfied.

Table 4.2: Provision of Service

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Provision of Service	>90%	95%	96%	90%	98%

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. In case of Airtel 97% of the customers, in case of Tata 96% of the customers and in case of Reliance and BSNL 95% of the customers are satisfied on the parameter.

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

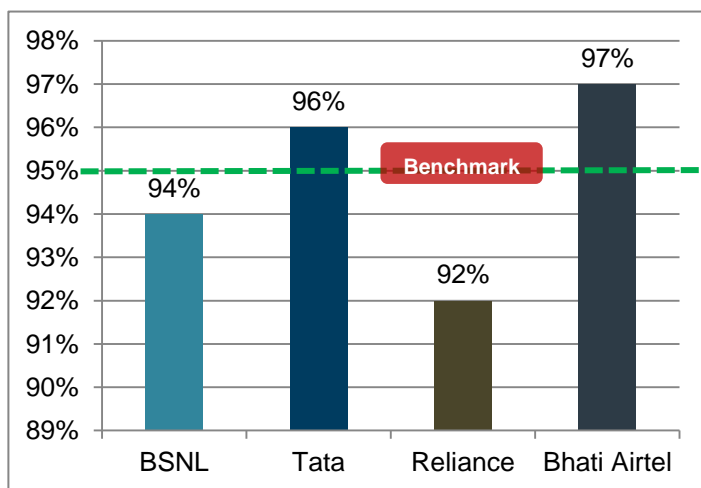
Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Billing Performance – Post-Paid	>95%	96%	96%	95%	97%

Source: IMM Analysis

4.1.1.3 Help Services

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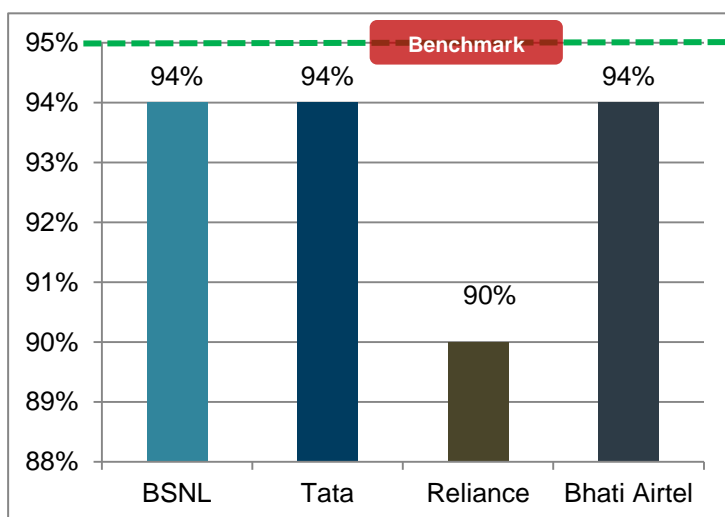
■ The benchmark for the Help Services parameter is that of >95% of the customers being satisfied on the parameter. Airtel and Tata have met the benchmark for the parameter while the others have not. In case of Airtel 97% of the customers and in case of Tata 88% of the customers are satisfied. While BSNL and Reliance have not been able to meet the parameter by marginal difference of 1% and 3% respectively.

Table 4.4: Help Services – Gujarat Circle

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Help Services	>95%	94%	96%	92%	97%

Source: IMM Analysis

4.1.1.4 Network Performance, Reliability and Availability



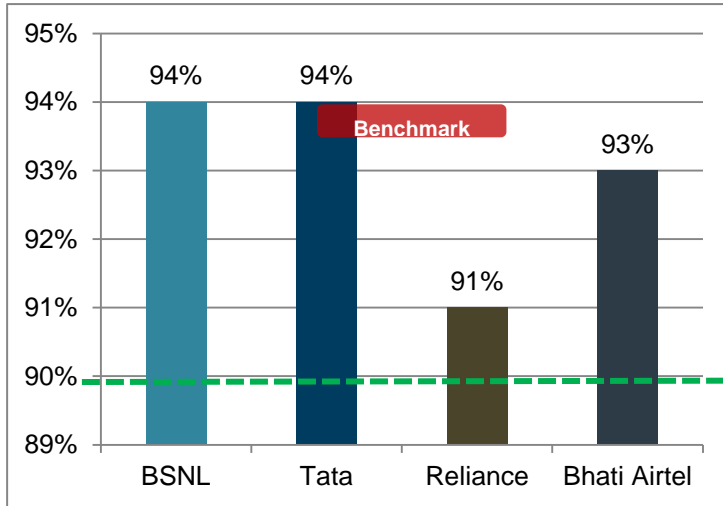
■ The benchmark for the Network Performance, Reliability and Availability parameter is that of >95% of the customers being satisfied on the parameter. No service provider has met the benchmark level of satisfaction. BSNL, Tata and Airtel have missed the benchmark with marginal difference of 1%.

Table 4.5: Network Performance, Reliability and Availability – Gujarat Circle

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Network Performance, Reliability and Availability	>95%	94%	94%	90%	94%

Source: IMM Analysis

4.1.1.5 Maintainability



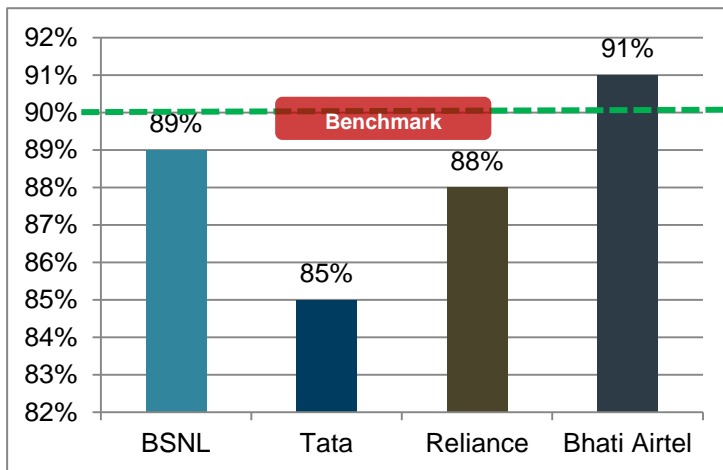
■ The benchmark for the Maintainability parameter is that of >90% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the maintainability parameter. BSNL and Tata has satisfaction level of 94% whiel Airtel and Reliance have 93% and 91% respectively.

Table 4.6: Maintainability – Gujarat Circle

Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Maintainability	>90%	94%	94%	91%	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 4.7: Supplementary and Value Added Services – Gujarat Circle

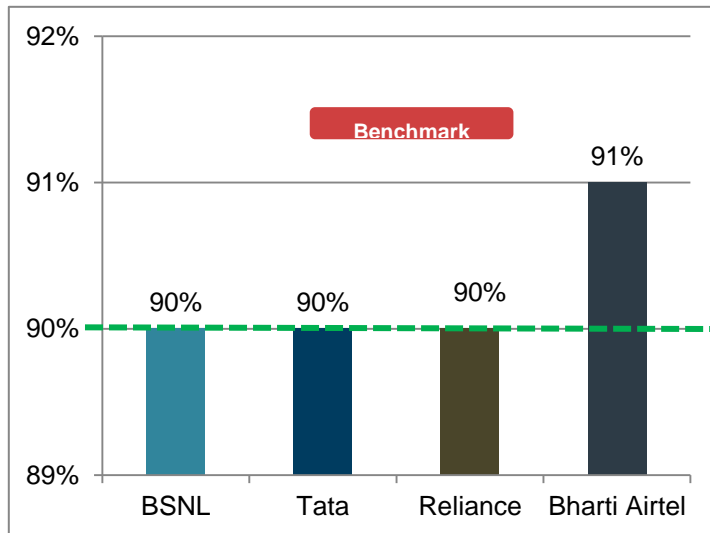
Parameter	Benchmark	BSNL	Tata	Reliance	Bharti Airtel
Customer Satisfied With Supplementary and Value Added Services	>90%	94%	94%	91%	93%

Source: IMM Analysis

4.1.1.7 Overall Quality of Telephone Service

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■ 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 91% of the customers, in case of BSNL, Tata and Reliance the satisfaction level is 90%.

Table 4.8: Overall Quality of Telephone Service – Gujarat Circle

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

Source: IMM Analysis

4.1.2 Cellular Service

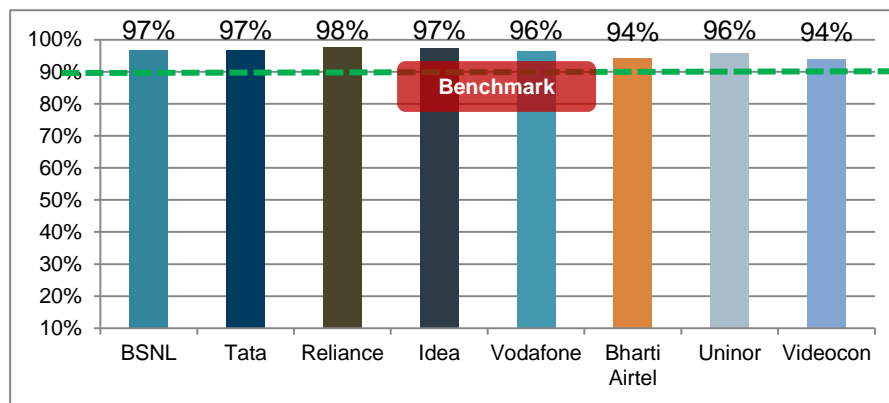
The performance compliance of the service providers for the cellular service is as given below

Table 4.9: Performance Compliance-Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Provision of Service	≥90%	97%	97%	98%	97%	96%	94%	96%	94%
Billing Performance – Pre-Paid	≥95%	96%	98%	97%	99%	96%	96%	98%	95%
Billing Performance – Post-Paid	≥95%	96%	96%	95%	98%	96%	95%	-	-
Help Services	≥90%	93%	96%	94%	97%	95%	95%	92%	94%
Network Performance, Reliability and Availability	≥95%	90%	91%	91%	93%	93%	91%	89%	86%
Maintainability	≥95%	94%	97%	95%	97%	96%	93%	94%	92%
Supplementary Services and Value Added Services	≥90%	90%	85%	88%	89%	87%	87%	85%	84%
Mobile Data/Internet Services	≥90%	84%	87%	84%	87%	88%	89%	81%	85%
Wireless USB Dongle Services	≥90%	76%	82%	86%	91%	83%	83%	82%	85%
Overall Quality of Telephone Service	≥90%	93%	92%	91%	97%	93%	92%	91%	93%

Source: IMM Analysis

4.1.2.1 Provision of Service

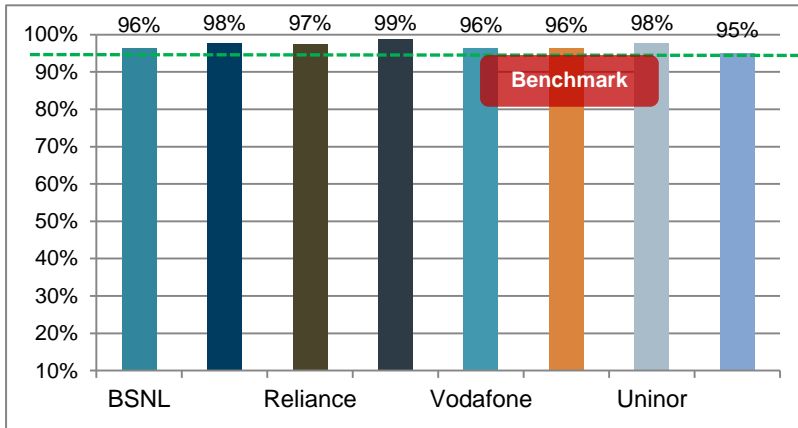


■ The benchmark for the Provision of Service parameter is that of >90% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the provision of service parameter.

Table 4.10: Provision of Service -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Provision of Service	≥90%	97%	97%	98%	97%	96%	94%	96%	94%

4.1.2.2 Billing Performance-Pre-Paid

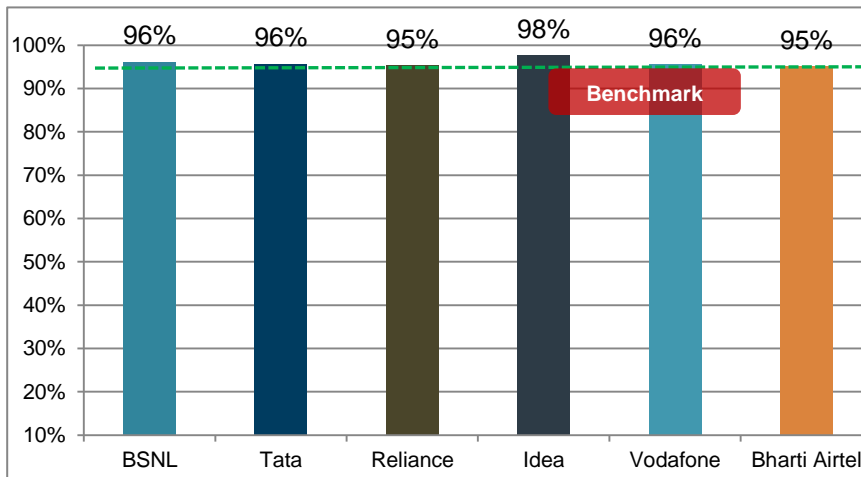


■ The benchmark for the Billing Performance parameter is that of >95% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the parameter.

Table 4.11: Billing Performance – Pre-Paid -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Billing Performance – Pre-Paid	>95%	96%	98%	97%	99%	96%	96%	98%	95%

4.1.2.3 Billing Performance-Post-Paid

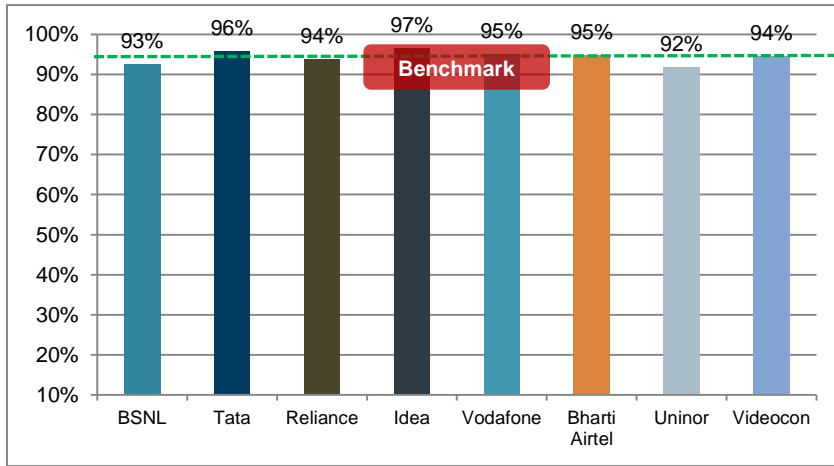


■ The benchmark for the Billing Performance parameter is that of >95% of the customers being satisfied on the parameter. All the service providers have met the benchmark for the parameter. Idea has the highest satisfaction level of 98%. Videocon and Uninor do not offer Post-Paid options to its consumers.

Table 4.12: Billing Performance – Post-Paid -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Billing Performance – Post-Paid	>95%	96%	96%	95%	98%	96%	95%	-	-

4.1.2.4 Help Services

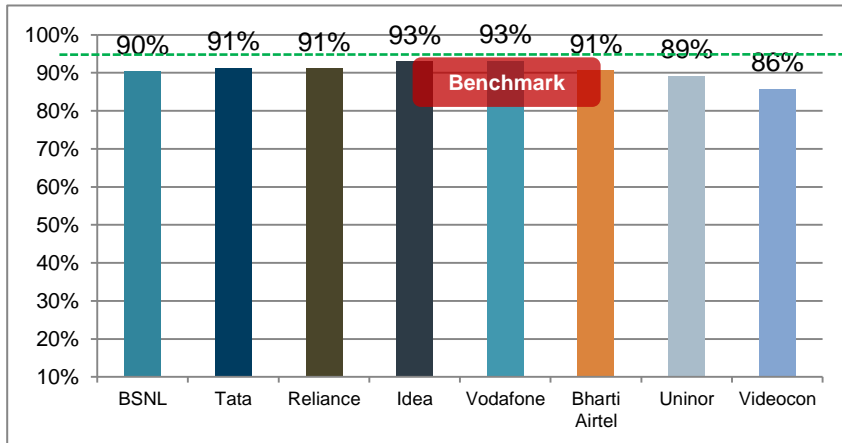


The benchmark for the Help Services parameter is that of >95% of the customers being satisfied on the parameter. Tata, Idea, Vodafone and Airtel have met the benchmark for the parameter while the others are missing the parameter marginally.

Table 4.13: Help Services -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Help Services	>95%	93%	96%	94%	97%	95%	95%	92%	94%

4.1.2.5 Network Performance, Reliability and Availability

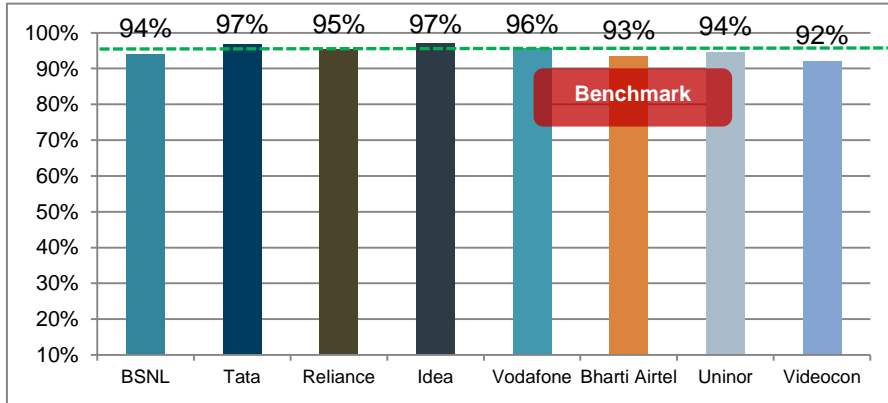


The benchmark for the Network Performance, Reliability and Availability parameter is that of >95% of the customers being satisfied on the parameter. No service provider has met the parameter. However the satisfaction is in the range of 85-95%.

Table 4.14: Network Performance, Reliability and Availability -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Network Performance, Reliability and Availability	>95%	90%	91%	91%	93%	93%	91%	89%	86%

4.1.2.6 Maintainability

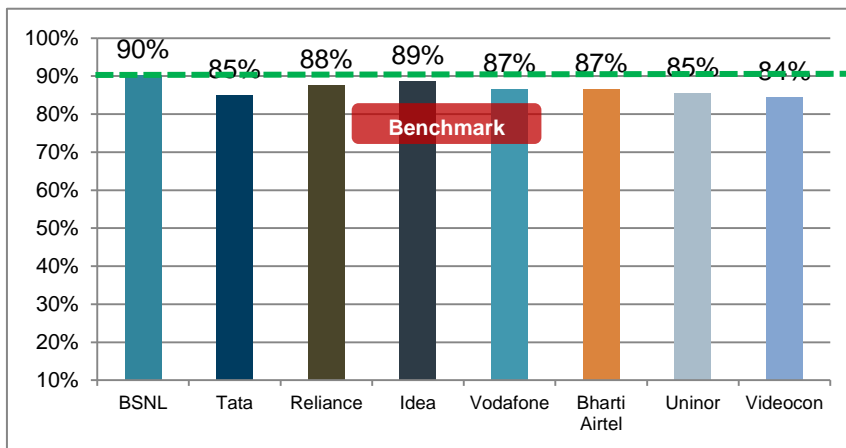


The benchmark for the Maintainability parameter is that of >90% of the customers being satisfied on the parameter. Tata, Reliance, Idea and Vodafone have met the benchmark parameters. Others have marginally missed the benchmark satisfaction level.

Table 4.15: Maintainability -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Maintainability	>90%	94%	97%	95%	97%	96%	93%	94%	92%

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. Only BSNL has met the parameter at 90% level.

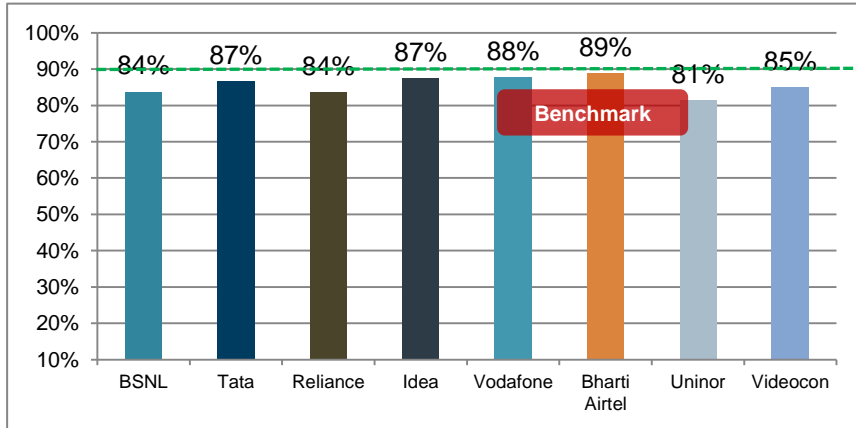
Table 4.16: Supplementary Services and Value Added Services -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Supplementary Services and Value Added Services	>90%	90%	85%	88%	89%	87%	87%	85%	84%

4.1.2.8 Mobile Data / Internet Service

Final Report - West Zone (Gujarat)

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

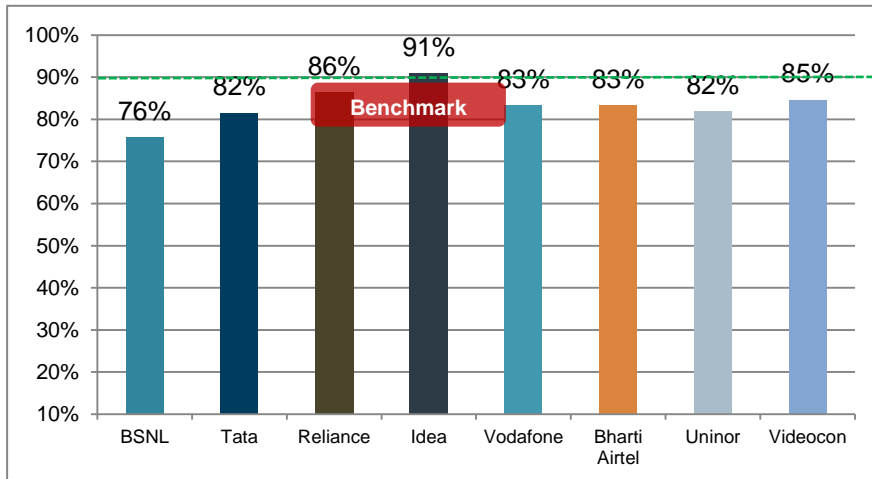


The benchmark for the Overall Quality of Telephone Service parameter is that of >90% of the customers being satisfied on the parameter. No service provider has met the parameter. However the satisfaction level is in the range of 80-89%.

Table 4.17: Mobile Data/Internet Service -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Mobile Data/Internet Service	>90%	84%	87%	84%	87%	88%	89%	81%	85%

4.1.2.9 Wireless / USB / Dongle Service

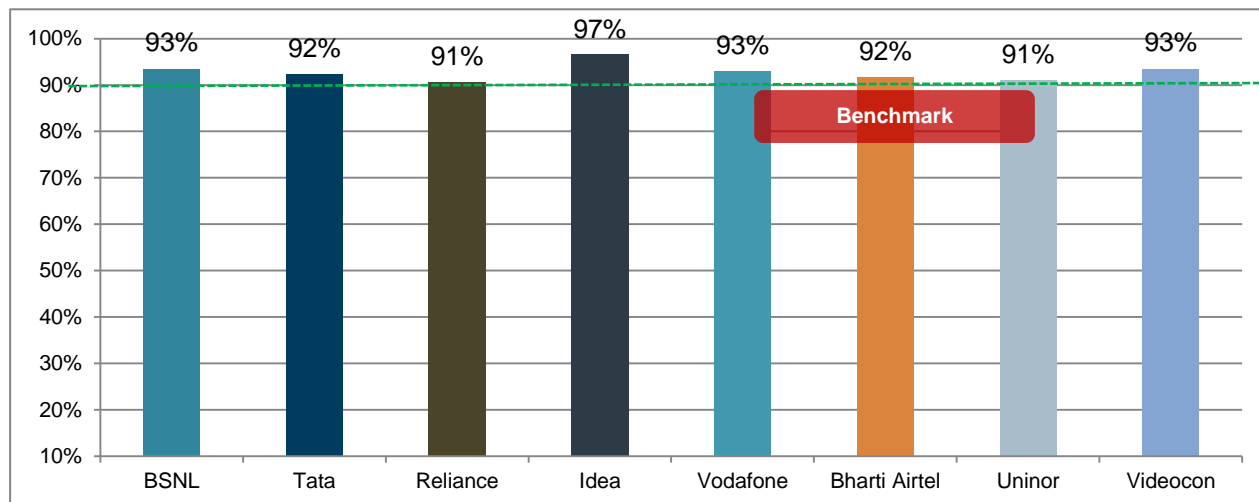


The benchmark for the Overall Quality of Telephone Service parameter is that of >90% of the customers being satisfied on the parameter. Only Idea has met the parameter with satisfaction level of 91%.

Table 4.18: Wireless / USB / Dongle Service -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Wireless / USB / Dongle Service	>90%	76%	82%	86%	91%	83%	83%	82%	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. Idea has the highest satisfaction level of 97% while the others have satisfaction levels in the range of 90-95%.

Table 4.19: Overall Quality of Telephone Service -Cellular Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Overall Quality of Telephone Service	>90%	93%	92%	91%	97%	93%	92%	91%	93%

4.1.3 Broadband Service

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

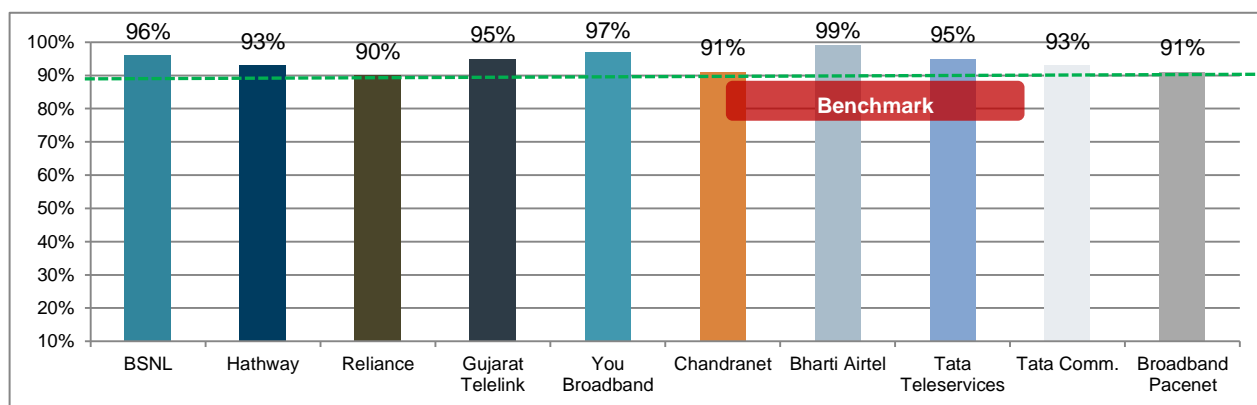
Table 4.20: Performance Compliance-Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Provision of service	>90%	96%	93%	90%	95%	97%	91%	99%	95%	93%	91%
Billing performance: Pre-Paid	>90%	-	94%	-	95%	96%	91%	-	100%	91%	91%
Billing performance: Post-Paid	>90%	97%	-	91%	-	97%	-	99%	93%	91%	90%
Help services	>90%	95%	75%	73%	82%	89%	84%	97%	89%	77%	86%
Network performance, reliability and availability	>85%	91%	85%	81%	90%	89%	81%	96%	90%	81%	88%

Maintainability	>85%	96%	86%	81%	86%	88%	78%	96%	91%	83%	86%
Supplementary services	>85%	84%	83%	83%	85%	84%	80%	86%	89%	86%	84%
Overall Customer Satisfaction	>85%	93%	89%	86%	87%	91%	87%	95%	86%	89%	88%

Source: IMM Analysis

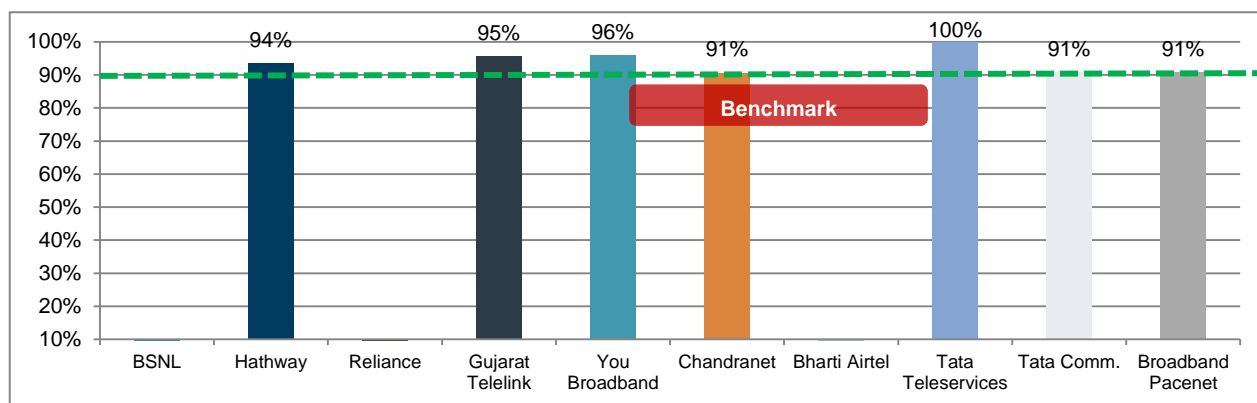
4.1.3.1 Provision of Service



- The benchmark for the Provision of Service parameter is that of >90% of the customers being satisfied on the parameter. All of the service providers have met the benchmark for the Provision of Service parameter. Airtel is a clear front runner with 99% of the customers being satisfied on the parameter. Rest Service providers have satisfaction levels in the range of 90-97%.

Table 4.21: Provision of Service-Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Provision of Service	>90%	96%	93%	90%	95%	97%	91%	99%	95%	93%	91%



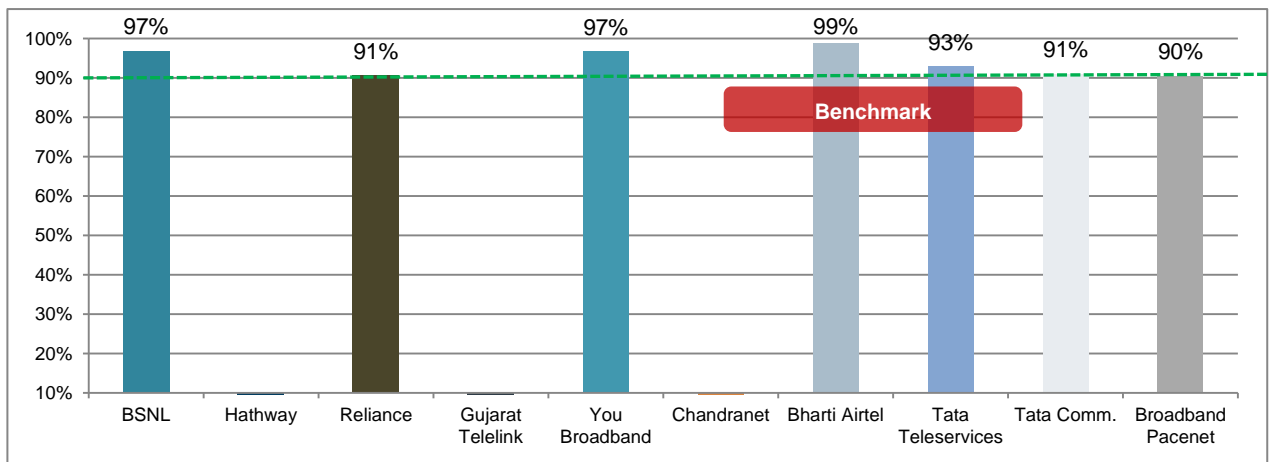
4.1.3.2 Billing Performance-Pre-Paid

- 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. No respondents found in the survey using pre-paid services of BSNL, Reliance and Airtel.

Table 4.22: Billing Performance: Pre-Paid -Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandrane t	Bharti Airtel	Tata Teleservice s	Tata Comm.	Broadband Pacenet
Billing Performance: Pre-Paid	-	94%	-	95%	96%	91%	-	100%	91%	91%	-

4.1.3.3 Billing Performance-Post-Paid

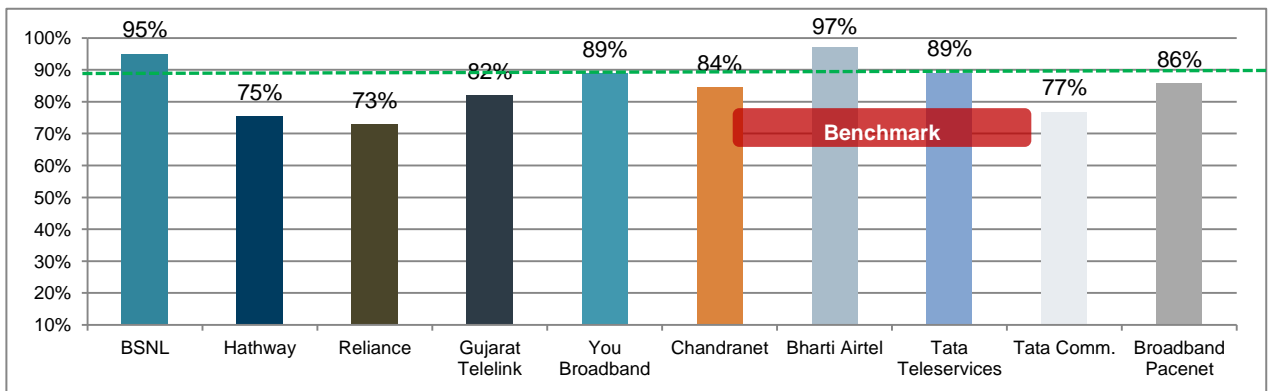


- The benchmark for the Billing Performance parameter is that of >90% of the customers being satisfied on the parameter. All of the service providers having post-paid services have met the benchmark for the Billing Performance parameter. In case of. Hathway, Gujarat Telelink and Chandranet, they do not give Post-Paid service options to their customers.

Table 4.23: Billing Performance: Post-Paid-Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandrane t	Bharti Airtel	Tata Teleservice s	Tata Comm.	Broadband Pacenet
Billing Performance: Post-Paid	>90%	97%	-	91%	-	97%	-	99%	93%	91%	90%

4.1.3.4 Help Services



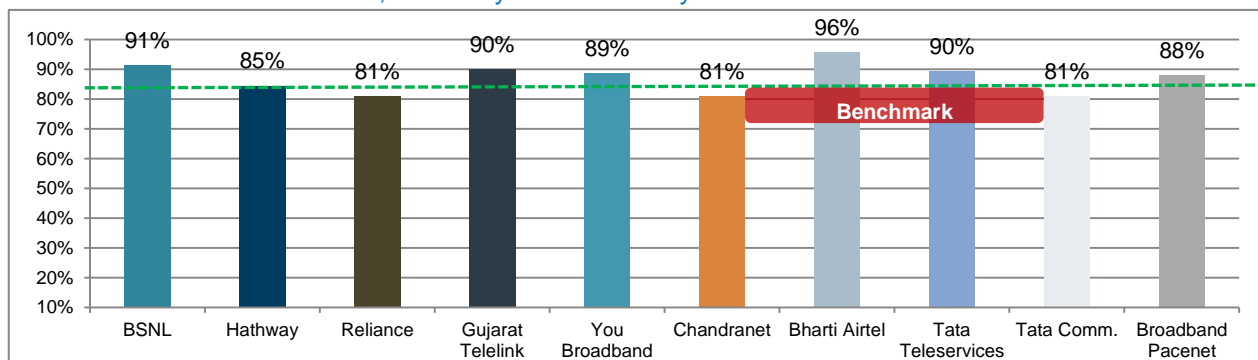
- The benchmark for the Help Services parameter is that of >90% of the customers being satisfied on the parameter. The satisfaction levels for the Help Services are low as compared to other

parameters. BSNL and Airtel have met the benchmark for the parameter with satisfaction level of 95% and 97% respectively. The satisfaction levels of the other service providers are in the range of 70-89%.

Table 4.24: Help Services -Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Help Services	>90%	95%	75%	73%	82%	89%	84%	97%	89%	77%	86%

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. Except Reliance, Tata Comm. And Chandranet, all service providers have met the benchmark for the parameter. Airtel has highest score of 96% followed by BSNL.

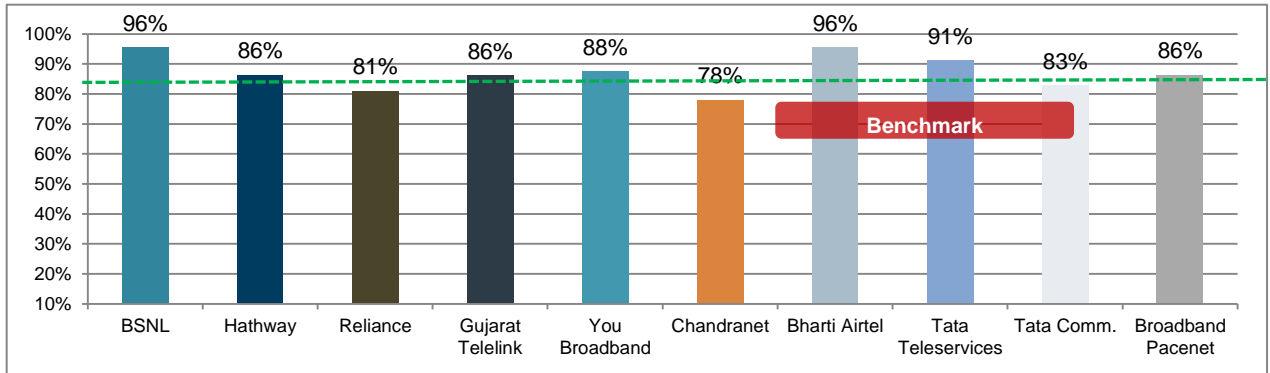
Table 4.25: Network performance, reliability and availability-Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Network performance, reliability and availability	>85%	91%	85%	81%	90%	89%	81%	96%	90%	81%	88%

4.1.3.6 Maintainability

Final Report - West Zone (Gujarat)

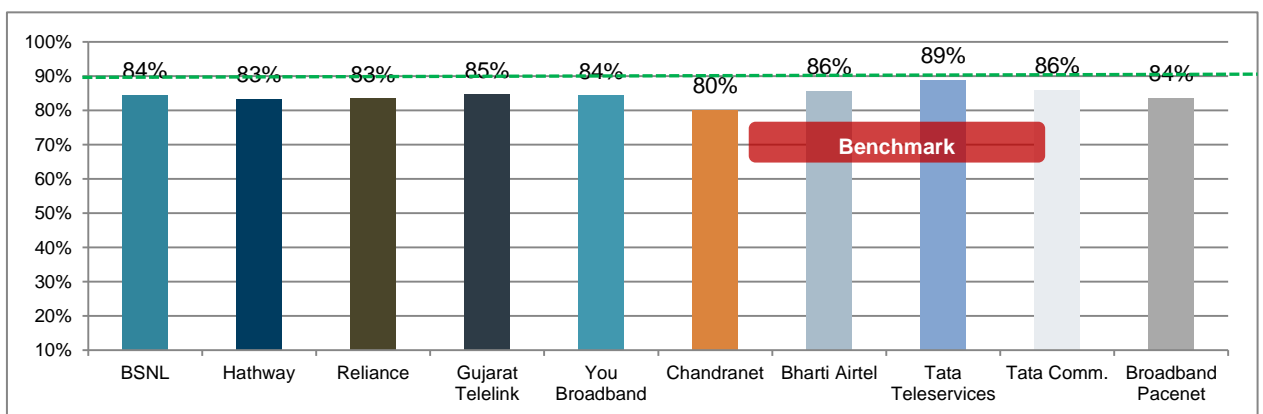
Assessment of (i) implementation and effectiveness of various regulations, directions and orders issued by TRAI in the interest of consumers and (ii) Customer Perception of Telecom Service Through Surveys



- The benchmark for the Maintainability parameter is that of >85% of the customers being satisfied on the parameter. BSNL, Hathway, Gujarat Telelink, You Broadband, Airtel, Tata Tele and Broadband Pacenet have met the benchmark for the Maintainability parameter. The satisfaction levels of the other service providers are in the range of 78-83%.

Table 4.26: Maintainability -Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Maintainability	>85%	96%	86%	81%	86%	88%	78%	96%	91%	83%	86%



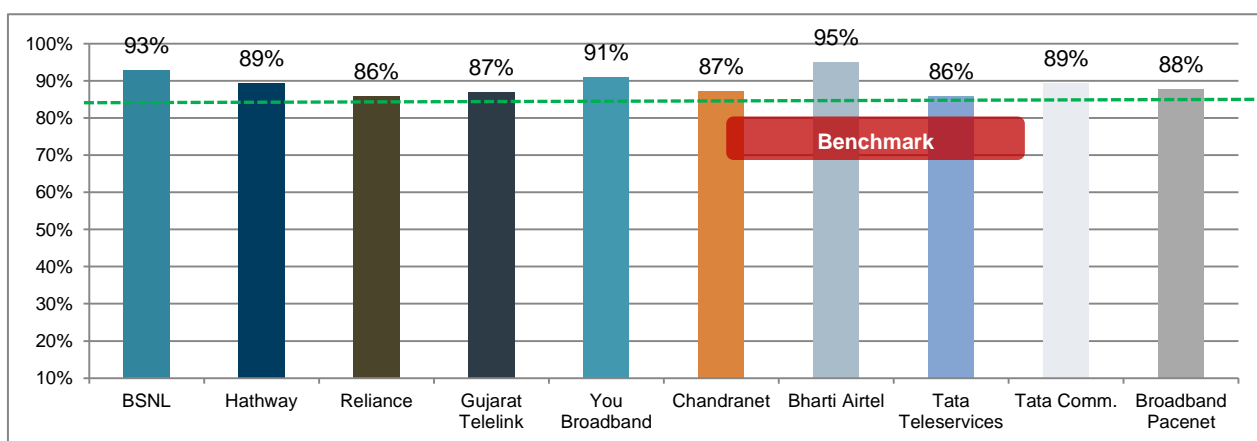
4.1.3.7 Supplementary Services and Value Added Services

- The benchmark for the Supplementary Services and Value Added Services parameter is that of >90% of the customers being satisfied on the parameter. No service provider has met the benchmark on this parameter. The satisfaction levels of all the service providers are in the range of 80-89%.

Table 4.27: Supplementary Services -Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Supplementary Services	>85%	84%	83%	83%	85%	84%	80%	86%	89%	86%	84%

4.1.3.8 Overall Quality of Telephone Service



- 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 followed by BSNL and You Broadband.

Table 4.28: Overall Customer Satisfaction -Broadband Service (Gujarat Circle)

Parameter	Benchmark	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Overall Customer Satisfaction	>85%	93%	89%	86%	87%	91%	87%	95%	86%	89%	88%

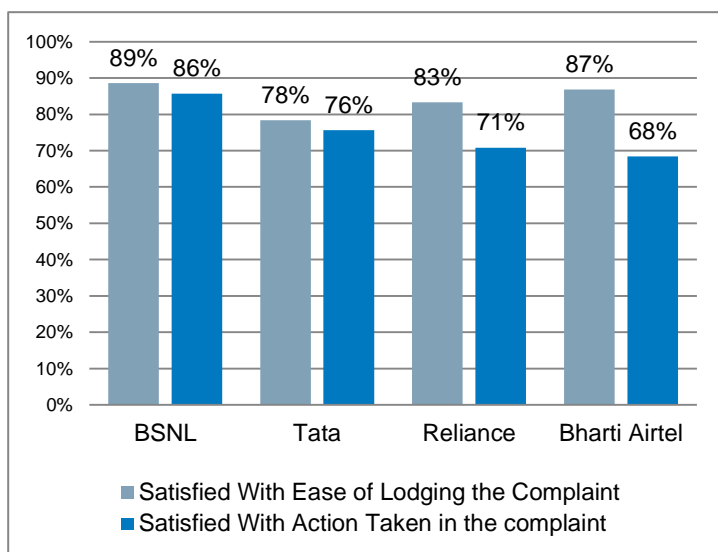
5 Assessment of TRAI Regulations and Directions

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.

- 32% of surveyed customers of Tata have registered their number for not receiving / blocking unsolicited commercial calls / SMSs, being the highest amongst all the service providers.
- 80% of the customers of Tata who had registered their number for not receiving / blocking unsolicited commercial calls / SMSs were satisfied with the effectiveness of the same. In case of BSNL, 83% and in case of Airtel 81% of the customers are satisfied with the effectiveness of blocking of unsolicited commercial calls.
- More than 20% consumers from all service providers have lodged a complaint in case the unsolicited call/SMS had not stopped in spite of registration.



- 89% of the customers of BSNL 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, BSNL is on the top followed by Tata, Reliance and Airtel.

Table 5.1: Assessment of Telecom Commercial Communications Customer Preference Regulation

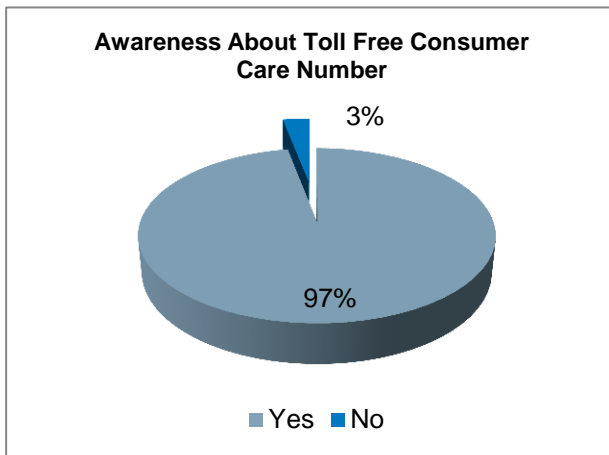
Particular	BSNL	Tata	Reliance	Bharti Airtel
Number registered for not receiving / blocking unsolicited commercial calls / SMSs	15%	32%	10%	18%
Customers satisfied with the effectiveness of blocking of unsolicited commercial calls	83%	80%	78%	81%
Registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same	21%	28%	22%	20%
Customers satisfied with the ease of lodging the complaint	89%	78%	83%	87%

Particular	BSNL	Tata	Reliance	Bharti Airtel
Customers satisfied with the action taken on the complaint	86%	76%	71%	68%

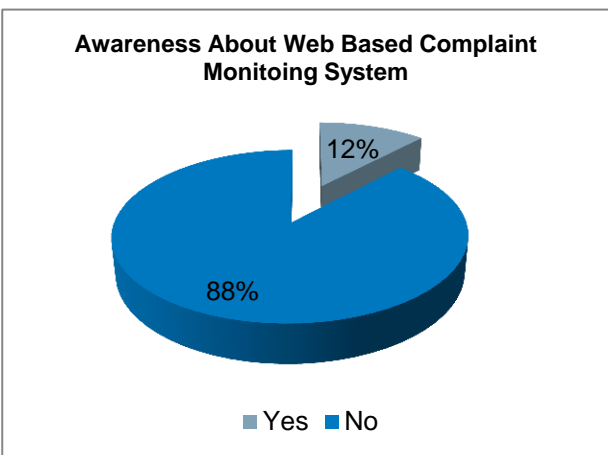
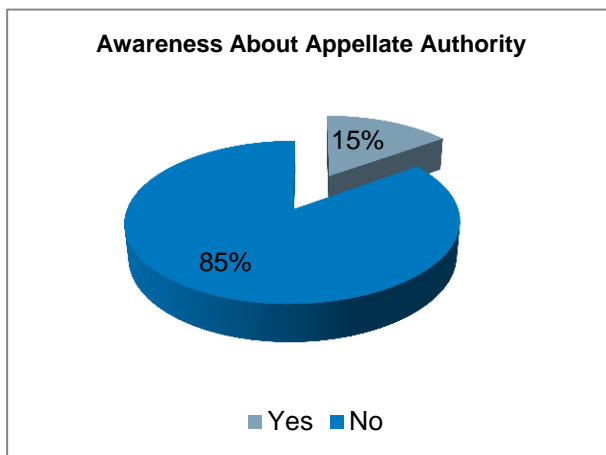
Source: IMM Analysis

5.1.2 Telecom Consumers Complaint Redressal Regulations, 2012.

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



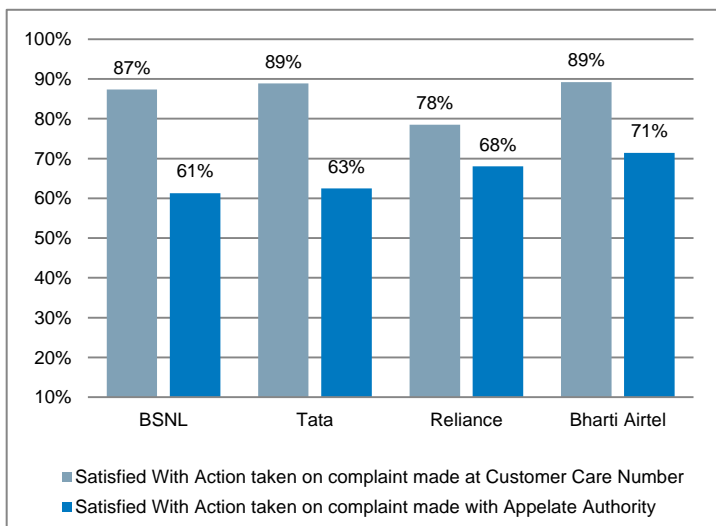
mechanisms a consumer can use to register their complaints which include the Toll Free Consumer Care Number, Appellate Authority for filing appeal in cases not satisfied with redressal of complaints and Web Based Complaint Monitoring System. The awareness about the toll free consumer care number is the highest with more than 95% of the total surveyed sample being aware about it. About 15% of the total respondents were aware about the Appellate Authority while 12% 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

- 69% of surveyed customers of Reliance have registered a complaint with the Toll Free Consumer Care number, being the highest amongst all the service providers. On the other hand BSNL has the least percentage of surveyed consumers who have registered a complaint with only 53% of the consumers have registered a complaint with Toll Free Consumer Care number.
- 78% of the customers of Reliance and 87% of BSNL 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 Tata and Airtel being 89%.



- Around 3% of surveyed customers of BSNL have registered a complaint with the Appellate Authority, being the highest amongst all the service providers. 61% of such customers are satisfied with the action taken.
- The satisfaction level is higher in case of Airtel followed by Reliance, Tata and BSNL with respect to action taken on complaint made with Appellate Authority.

Table 5.2: Assessment of Telecom Consumer Protection Regulation

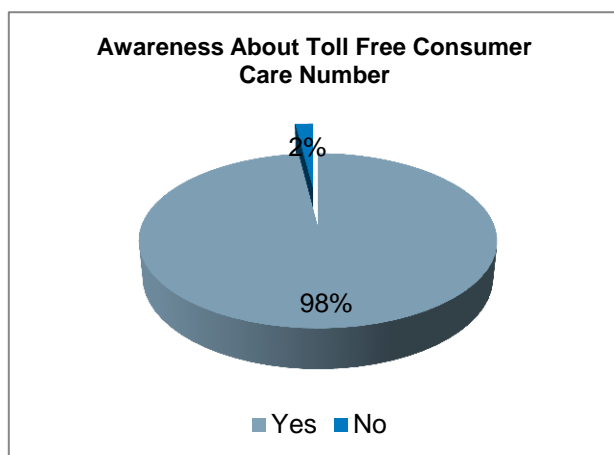
Particular	BSNL	Tata	Reliance	Bharti Airtel
Made complaint to the toll free Consumer Care Number	53%	61%	69%	62%
Customers satisfied with the manner in which complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint	87%	89%	78%	89%
Filed any appeal with the appellate authority	2.91%	1.94%	2.34%	0.66%
Customers satisfied with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.	61%	63%	68%	71%

Source: IMM Analysis

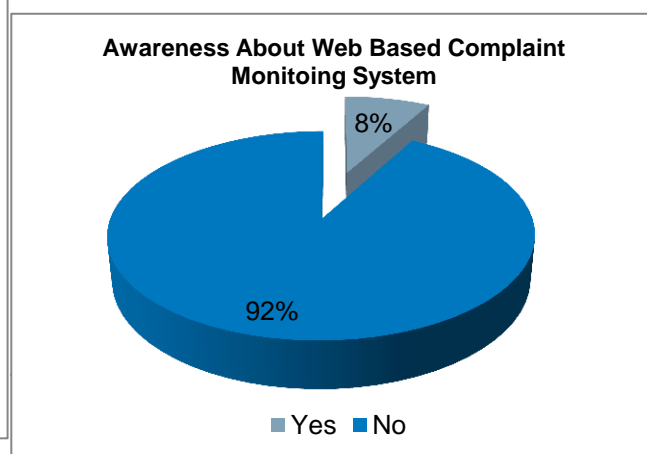
5.2 Cellular Service

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

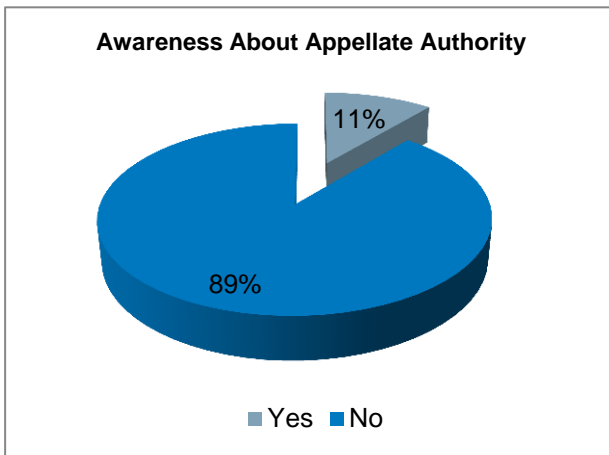
5.2.1 Telecom Consumers Complaint Redressal Regulations, 2012.



As per the Telecom Consumers Complaint



Redressal Regulation there are three grievance rederssal 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 98% of the total surveyed sample being aware about it. 11% of the total respondents were aware about the Appellate Authority while 8% 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

- 30-40% of surveyed customers from each service provider have registered a complaint with the Toll Free Consumer Care number. More than 80% customers are satisfied against the action taken.
- Very few (less than 1%) customers have lodged complaint with Appellate Authority.

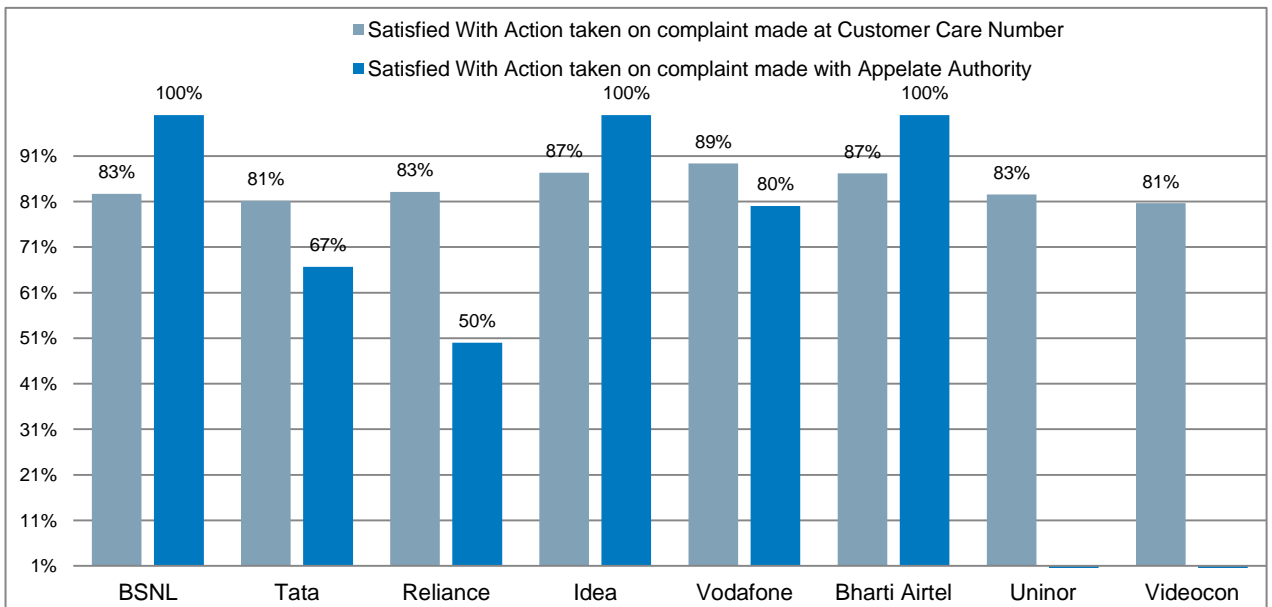


Table 5.3: Assessment of Telecom Consumers Complaint Redressal Regulations

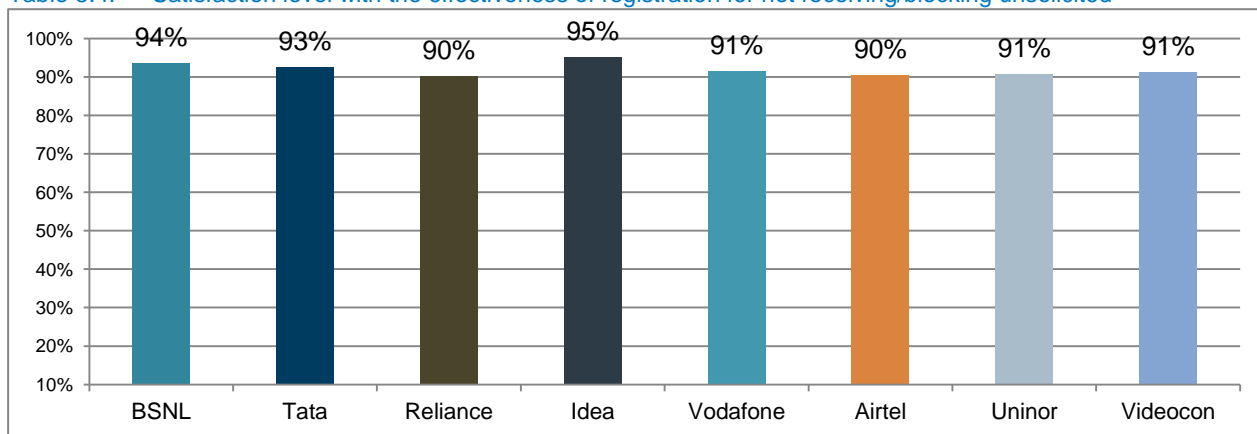
Particular	BSNL	Tata	Reliance	Idea	Vodafone	Bharti Airtel	Uninor	Videocon
Made complaint to the toll free Consumer Care Number	35%	36%	38%	35%	34%	32%	39%	39%
Customers satisfied with the manner in which complaint was addressed to such as intimation of docket number and likely time for redressal of complaint, intimation of action taken on the complaint	83%	81%	83%	87%	89%	87%	83%	81%
Filed any appeal with the appellate authority	0.09%	0.28%	0.56%	0.09%	0.47%	0.09%	0.00%	0.00%
Customers satisfied with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.	100%	67%	50%	100%	80%	100%	-	-

Source: IMM Analysis

5.2.2 The Telecom Commercial Communications Customer Preference Regulations, 2010.

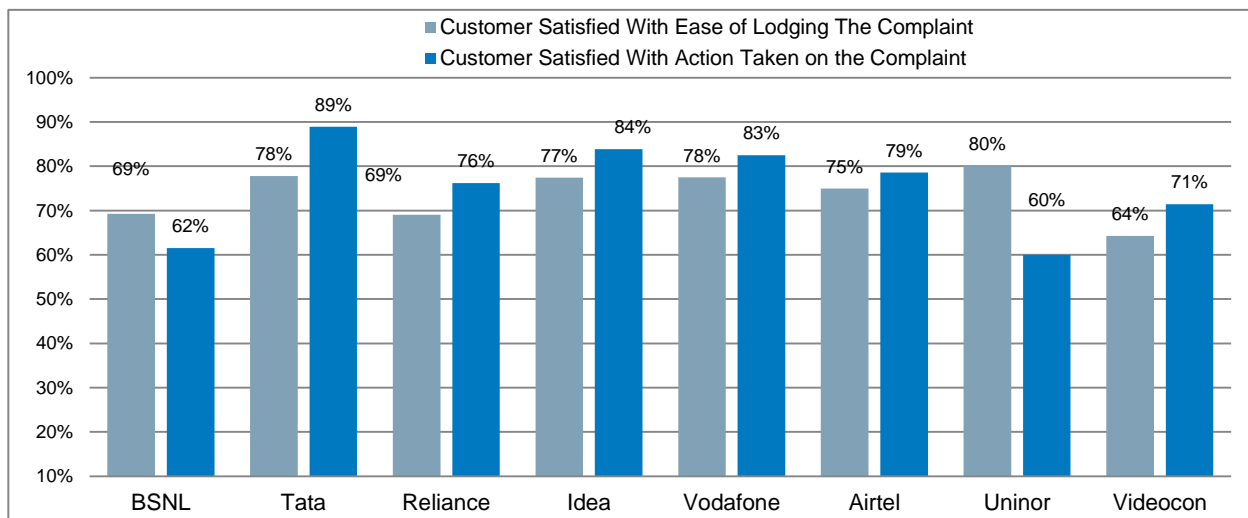
The Telecom Commercial Communications Customer Preference Regulations, 2010 gives a telecom consumer the option of registering his/her mobile number for not receiving/blocking unsolicited commercial calls / SMSs. The consumer also has the option to register his number to be accessible to telemarketers 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.

Table 5.4: Satisfaction level with the effectiveness of registration for not receiving/blocking unsolicited



calls/SMSs

- More than 90% 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.



- 80% of the customers of Uninor 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 84% of the customers of Tata and Idea respectively who had registered their complaint were satisfied with the action taken on their complaints, being the highest amongst all the service providers.

Table 5.5: Assessment of Telecom Commercial Communications Customer Preference Regulation

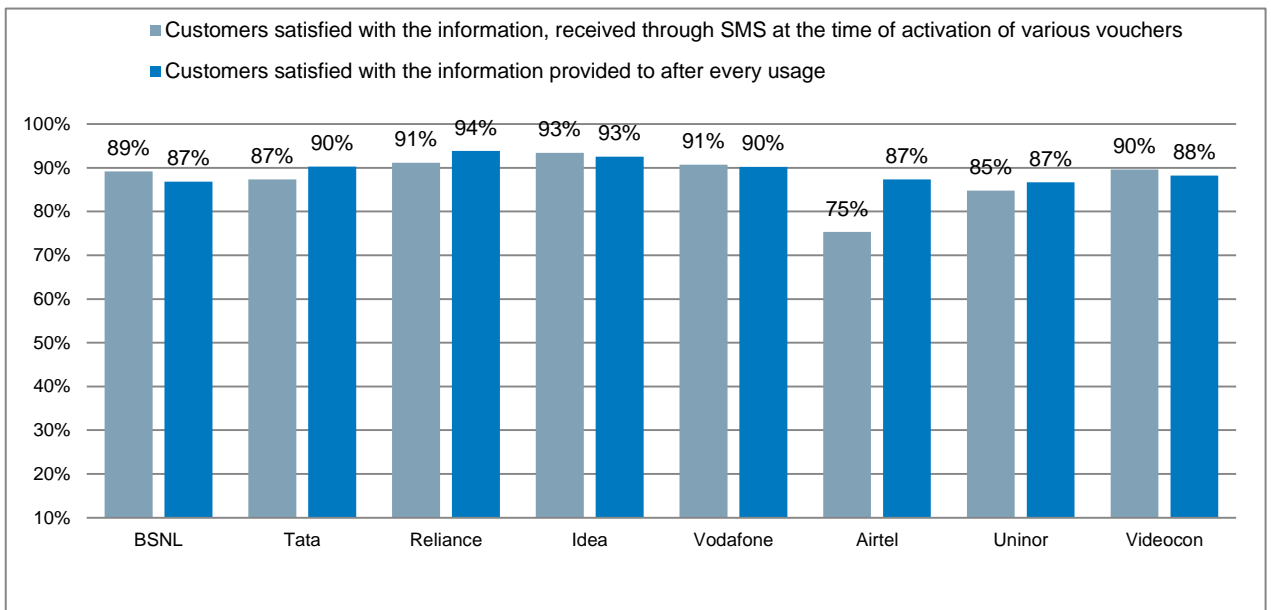
Particular	BSNL	Tata	Reliance	Idea	Vodafone	Airtel	Uninor	Videocon
Number registered for not receiving / blocking unsolicited commercial calls / SMSs	28%	21%	65%	72%	40%	34%	15%	21%
Customers satisfied with the effectiveness of blocking of unsolicited commercial calls	94%	93%	90%	95%	91%	90%	91%	91%
Registered a complaint, in case the unsolicited call/SMS have not had not stopped in spite of registration for the same	9%	8%	6%	4%	9%	8%	9%	6%
Customers satisfied with the ease of lodging the complaint	69%	78%	69%	77%	78%	75%	80%	64%
Customers satisfied with the action taken on the complaint	62%	89%	76%	84%	83%	79%	60%	71%

Source: IMM Analysis

5.2.3 Telecom Consumers Protection Regulations, 2012.

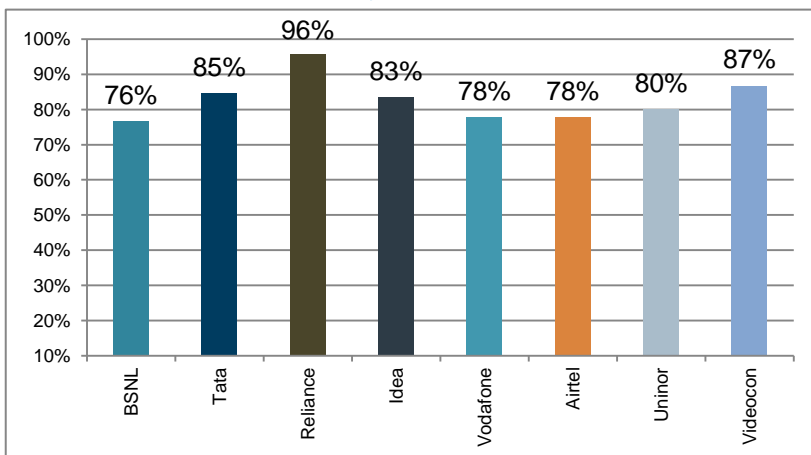
As per the Telecom Consumers Protection Regulations, 2012 every service provider has to, immediately on the activation of a voucher provide through SMS to the pre-paid consumer details such as amount charged, processing fee, taxes deducted, title of the plan, validity of the plan etc. The regulations 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 85% of the customers from all service providers except Airtel are satisfied with the information, received through SMS at the time of activation of various vouchers. Idea has the highest level of satisfaction of 93% while only 75% of the surveyed Airtel 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 85% 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 2-5% for each service provider. Amongst them the customers of Reliance have the highest

satisfaction level with 96% of the customers being satisfied with the timely receipt and completeness of the item-wise usage bill.

Table 5.6: Assessment of Telecom Consumer Protection Regulation

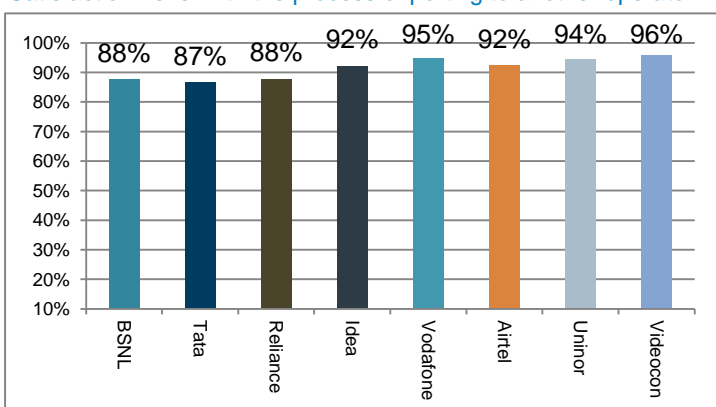
Particular	BSNL	Tata	Reliance	Idea	Vodafone	Airtel	Uninor	Videocon
Customers satisfied with the information, received through SMS at the time of activation of various vouchers, such as amount charged, processing fee, taxes deducted, title of the plan, validity etc	89%	87%	91%	93%	91%	75%	85%	90%
Customers satisfied with the information provided to you after every usage, such as duration of call, charges deducted, balance in account etc	87%	90%	94%	93%	90%	87%	87%	88%
Requested for an item-wise usage bill	1.86%	2.00%	2.84%	1.27%	3.22%	1.79%	3.28%	4.22%
Customers satisfied with the timely receipt and completeness of the item-wise usage bill on request	76%	85%	96%	83%	78%	78%	80%	87%

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 16% for all the service providers.
- 96% of the Videocon and 95% of Vodafone 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 e providers the satisfaction levels are in the range of 80-95%.

Table 5.7: Assessment of Telecommunication Mobile Number Portability Regulations

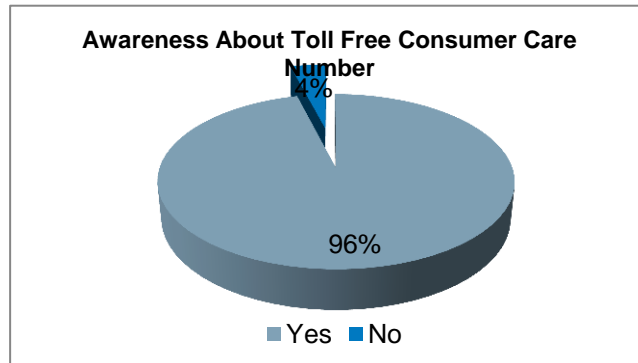
Particular	BSNL	Tata	Reliance	Idea	Vodafone	Airtel	Uninor	Videocon
Utilized the service of Mobile number portability for changing your operator	3.75%	11.81%	13.03%	13.21%	16.03%	6.09%	6.65%	9.09%
Customers satisfied with the process of porting to another operator	88%	87%	88%	92%	95%	92%	94%	96%

Source: IMM Analysis

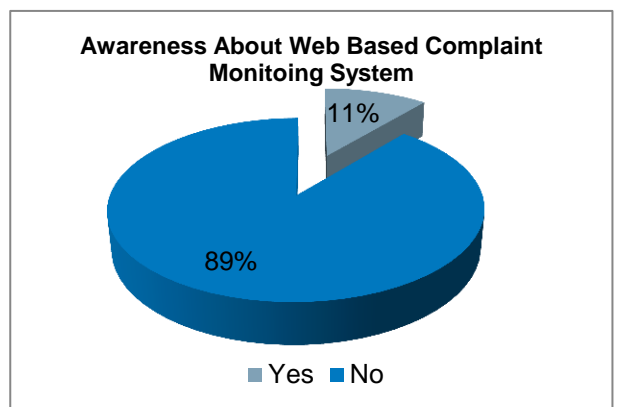
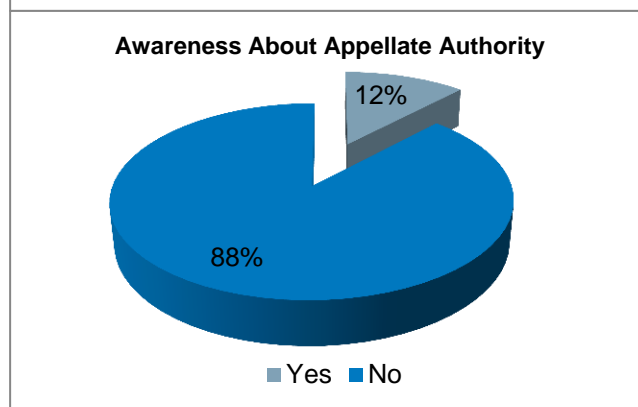
5.3 Broadband Service

5.3.1 Telecom Consumers Complaint Redressal Regulations, 2012

As per the Telecom Consumers Complaint Redressal Regulation there are three grievance rederssal 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 96% of the total surveyed sample being aware about it. Around 12% of the total respondents were aware about the Appellate Authority while 89% of the respondents were aware about the Web Based Complaint Monitoring System.

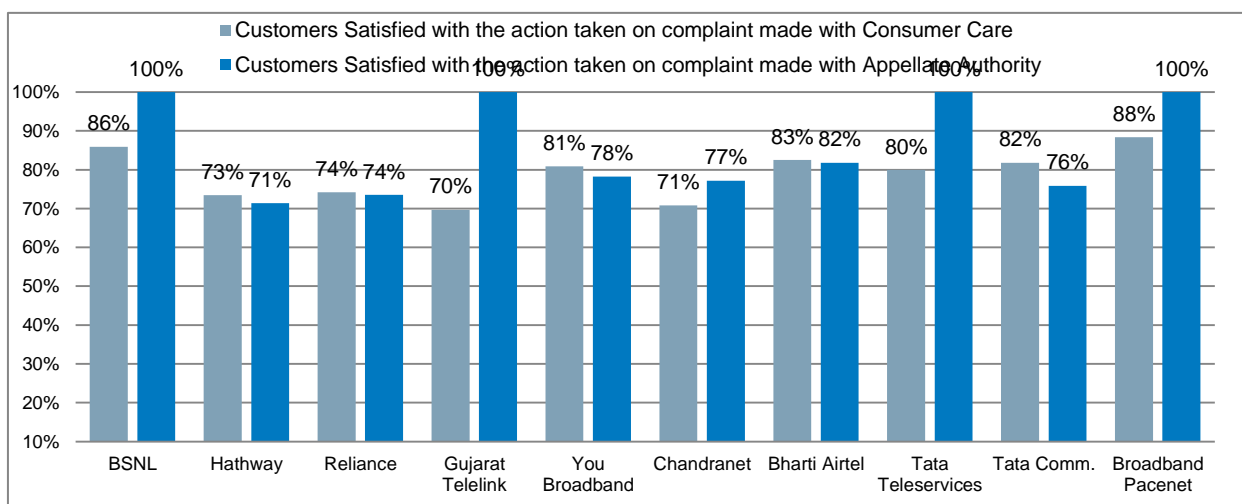


5.3.1.1 Level of Satisfaction With the Action Taken on Complaints

- 88% of surveyed customers of Broadband Pacenet 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 Gujarat Telelink has the least percentage of satisfied surveyed consumers who have registered a complaint with Toll Free Consumer Care number.

- More than 70% of the customers who have registered complaint with the Toll Free Consumer care number from all service providers are satisfied.



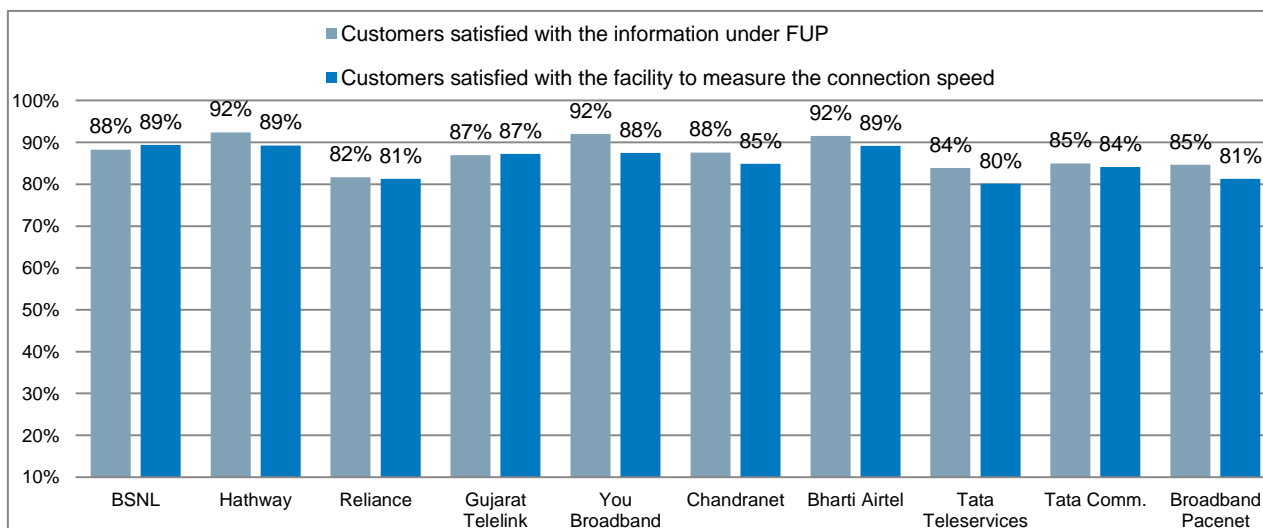
- 100% of surveyed customers of BSNL, Gujarat Telelink, Tata Teleservice and Broadband Pacenet who have registered a complaint with the Appellate Authority are satisfied, being the highest amongst all the service providers. On the other hand 70% of the surveyed consumers of Hathhave registered least complaints with the Appellate Authority.
- More than 70% of the customers who who had registered a complaint with the Appellate Authority from each service provider are satisfied with the action taken.

Table 5.8: Assessment of Telecom Consumer Complaint Redressal Regulations

Particular	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
Made complaint to the toll free Consumer Care Number	44%	37%	60%	50%	56%	53%	31%	40%	43%	63%
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	86%	73%	74%	70%	81%	71%	83%	80%	82%	88%
Filed any appeal with the appellate authority	0.09%	0.66%	3.19%	0.09%	2.16%	3.28%	1.03%	0.09%	2.72%	0.09%
Level of satisfaction with the manner in which appeal was addressed to such as acknowledgement of appeal, intimation of decision taken etc.	100%	71%	74%	100%	78%	77%	82%	100%	76%	100%

Source: IMM Analysis

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



- 92% of the surveyed customers of Hathway, You Broadband and 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 80% with respect information provided under FUP.
- 89% of the surveyed customers of BSNL, Hathway and 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 80%.

Table 5.9: Assessment Directions Related to Fair Usage Policy and Measurement of Broadband Speed

Particular	BSNL	Hathway	Reliance	Gujarat Telelink	You Broadband	Chandranet	Bharti Airtel	Tata Teleservices	Tata Comm.	Broadband Pacenet
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	88%	92%	82%	87%	92%	88%	92%	84%	85%	85%
Customers satisfied with the facility to measure the broadband connection speed provided by the service provider	89%	89%	81%	87%	88%	85%	89%	80%	84%	81%

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 Gujarat 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 80%.

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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.	C C	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						
Usage Type	1	Residential				2	Commercial		User 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 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
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
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	1	2	3	4	5	6	7

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service provided including activation, deactivation, charges etc? (CV 2)																						
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. 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

		TELECOM REGULATORY AUTHORITY OF INDIA														
		CUSTOMER PERCEPTION STUDY														
(Cellular Mobile)																
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						
Address		Dist.		State		M. 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																
<p>In your opinion, how satisfied are you with your cellular 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						
8. 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
9. 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
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
10. 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
11. 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
12. 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
13. 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	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
14. MOBILE DATA/INTERNET SERVICES							
Do you use data/internet services offered by your operator on your mobile device? (CV 3)	1	Yes		2	No		
If Yes, How satisfied are you with speed of data connection? (CV 4)	1	2	3	4	5	6	7
15. WIRELESS USB DONGLE							
Do you use a wireless USB dongle device (For e.g. Tata Photon, etc.) for accessing internet?	1	Yes		2	No		
If Yes, How satisfied are you with coverage and availability of internet connection	1	2	3	4	5	6	7

on your wireless USB dongle device?																					
16. Overall Quality of the Telephone Service											1	2	3	4	5	6	7				
Implementation and Effectiveness of various Regulations and Directions issued by TRAI																					
11. Have you registered your number for not receiving/blocking unsolicited commercial calls / SMSs?											1	Yes		2	No						
12. 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				
13. 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						
14. If Yes, how satisfied are you with the ease of lodging the complaint?											1	2	3	4	5	6	7				
15. 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																					
16. 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				
17. 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				
18. A pre paid 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						
19. 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				
20. 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										
21. Have you made any complaint to the toll free Consumer Care Number?											1	Yes		2	No						
22. 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				
23. Have you filed any appeal with the appellate authority?											1	Yes		2	No						
24. 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				
25. Have you utilized the service of Mobile number portability for changing your operator?											1	Yes		2	No						
26. 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

		TELECOM REGULATORY AUTHORITY OF INDIA													
		CUSTOMER PERCEPTION STUDY (West Zone)													
		(Broadband)													
REF No.	C C	SR.No.	Interview Date				Interviewer's Name								
POP			Mode of Interview		1	In Person	2	Telepho nic	3	E-mail	4	Web/Onli ne			
<p>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.</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		
Occupati on	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		1	Tata Communication					
	2	Hathaway				10	You Broadband		1	Broadband Pacenet					
	3	Siti Cable				11	Tata		1	Syscon Infoway					

				Teleservices	9							
	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	User 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</p> <p style="text-align: center;">(1 = Extremely Dissatisfied, 7 = Extremely Satisfied)</p>												
Parameters and Attributes						Ratings						
17. 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
18. 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
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
19. 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				
20. 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				
21. 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				
22. 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	Yes	2	No							
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				
23. Overall Quality of the Telephone Service											
Implementation and Effectiveness of various Regulations and Directions issued by TRAI											
27. 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						
28. Have you made any complaint to the toll free Consumer Care Number?											
1	Yes	2	No								
29. 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					
30. Have you filed any appeal with the appellate authority?											
1	Yes	2	No								
31. 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					
32. 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					
33. 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

Final Report - West Zone (Gujarat)

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



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