



Digital Networks

The Health & Wealth
of the Nation

Annual Report
2019-20

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डा० आर एस शर्मा
Dr. R S Sharma



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भारतीय दूरसंचार विनियामक प्राधिकरण
Chairman
TELECOM REGULATORY AUTHORITY OF INDIA

Message



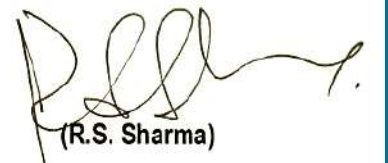
India is going through one of the most challenging periods in its recent history. The outbreak of the COVID-19 pandemic has adversely affected every segment of the society. It has also cast a shadow on the economic wellbeing of the country. During this critical period, the telecom sector has proved to be the backbone of the country to ensure connectivity. The telecom sector has made various sectors such as banking, education, etc offer their services available to the general public from the vicinity of their home through internet and mobile. Facilities like work from home, online classes, online payments, amongst others, continue to be available to citizens. The telecom services has truly become an "essential service" like water, roads and electricity.

During this difficult period, the DoT, TRAI and various Government Authorities have joined hand with the telecom service providers (TSPs) to ensure connectivity and also functioning of the online services while following the norms of social distancing. TRAI has also ensured that the TSPs are given appropriate support so that they can concentrate on operation and maintenance of their network and quality of service. TRAI, among other things, allowed six weeks extension to the TSPs to comply with their statutory reporting requirements. The COVID-19 outbreak has shifted the way many sectors do business and has focused on various digital on-line means by which companies can conduct their business and operations. Post COVID-19, the telecom sector will continue to remain a critical and supportive part of the functioning of just about all sectors so that the country's economy can bounce back to the path envisaged.

In the past year, in addition to addressing the challenges thrown up by the COVID-19 pandemic, TRAI has taken various measures to ensure orderly growth of the sector and protection of the interests of telecom consumers. As a forward looking regulatory body, TRAI continued to collaborate extensively with the COAI, the industry and other stakeholders to come out with innovative policy interventions and also adopted some of the best globally accepted practices and customised them for the Indian market, wherever required. The Authority has made various recommendations which are expected to benefit the sector in the long run. The Authority has also made recommendations to the Government of India on License Fees and Spectrum Usage Charges, to address the financial health of the sector.

5G will soon be a reality in India and TRAI is carrying out various initiatives on 5G, such as recommendations on the spectrum bands, releasing a white paper and organising workshops/seminars on 5G related topics. The industry, I am sure is also working on the planning and strategy to provide 5G based services to the customers. COAI is an effective interface between the industry, policymakers and the regulator. The role played by COAI for the betterment of the industry and implementation of the Digital India vision of the Government is commendable.

I wish COAI all success in all its future endeavour and successful completion of the Annual General Body Meeting 2020.


(R.S. Sharma)

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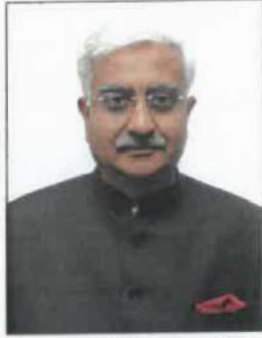
सचिव

Anshu Prakash, I.A.S
Secretary



सत्यमेव जयते

भारत सरकार
संचार मंत्रालय
दूरसंचार विभाग
Government of India
Ministry of Communications
Department of Telecommunications



MESSAGE

I am happy to learn that the Annual General Meeting of the Cellular Operators Association of India (COAI) is being held on 2nd July, 2020 and on this occasion the Annual Report for the year 2019-20 will be unveiled. COAI and the member constituents are an integral part of the telecommunications ecosystem in India. Robust performance by COAI and the constituent members significantly contributes to meeting the telecommunications needs of the country.

The year 2019-20 has witnessed expansion of telecommunications networks including coverage of the Indian population by 4G technology and phenomenal data consumption per mobile subscriber at prices which are, perhaps, lowest in the world. National Broadband Mission was launched in December 2019. Most important, however, was the challenge posed by the onset of the global pandemic of Covid-19 and the befitting response of the Telecommunications Sector to this major threat.


The entire Telecommunications Industry including the Telecom Service Providers (TSPs), and Internet Service Providers (ISPs), along with their committed workforce deserves praise for ensuring that India did not face even a single day's breakdown in telecommunications during the entire lockdown period and thereafter. In fact, the uptime of Base Transceiver Stations was even better during this period. Despite a surge in data consumption in mobiles from about 270 PB per day to 300 PB per day during the lockdown period, our telecommunications systems remained resilient and were able to cope with the increase in demand. The TSPs also significantly contributed to the efforts of the Government to contain the spread of the pandemic. In this regard, the messages conveyed through pre call announcement/ ring back tone; TSPs role in facilitating contact tracing; enabling COVID-19 Quarantine Alerts; "COVID Savdhan" with SMSs for target audience in focus areas; and other such interventions are some of the noteworthy contributions by TSPs in

leveraging technology for Public Health. The Telecommunications Sector also facilitated 'work from home' for Other Service Providers. The COVID-19 warriors of our health systems, police authorities and other public servants on duty, policy makers, etc., could not have effectively functioned without the robust and reliable telecom services offered by the telecom ecosystem. It is significant that the Panel Discussion scheduled after the AGM is on the topic 'Digital Networks - Health and Wealth of the Nation'. Without doubt, this will be an opportune time to take stock of where we stand and what steps are required by us to meet the challenges, specifically in the context of the continuing global pandemic. We should remember that every challenge also brings an opportunity for us to validate and improve our performance.

The mobile revolution is making significant progress in India. However, we also need to enhance Wireline Broadband coverage in the country as also fiberization of towers. We must further bridge the Digital Divide in terms of tele-density, access to broadband, etc. These goals have been subsumed in the National Broadband Mission. It is expected that COAI and the member constituents will play a major role in making this Mission successful. The Government of India, along with State Governments will also work towards easing "Right of Way" requirements.

The National Digital Communication Policy, an excellent document adopted by us, has already defined our roadmap of interventions and policy initiatives. Efforts will continue to be made in this regard. Department of Telecommunications will certainly provide the enabling environment to facilitate innovation, usher in new technologies and promote policies for sustaining the financial and operational health of the sector.

My best wishes to COAI for the success of the forthcoming event and for all their future endeavours.



(Anshu Prakash)



Chairman's Message

The COVID-19 pandemic has cast a shadow on the global and Indian economy affecting the lives of 1.3 billion Indians. With social distancing the only preventive measure to fight the virus, people are connected virtually and working from home. Normal life is disrupted with schools, offices, industries, transportation and movement of people restricted. Invariably, the mobile phone is the only link which people have to the outside world.

As Doctors and healthcare professionals stand at the forefront of this struggle, the telecom sector, law enforcement agencies, sanitation workers and other essential service providers are keeping the country operational. The 'telecom warriors', our staff on the ground, are risking their lives to ensure that people not only remain safely home and connected with family, friends, relatives and the government, but are also able to work from home, and further get seamless access to infotainment on their fingertips. Indeed, during the last few months, the telecom sector has proved once again, that it remains the backbone of the country and the digital economy.

Critical Infrastructure:

The lockdown resulted in digitizing the lives of many Indian citizens, with the telecom sector facilitating work from home (WFH), online education, mobile banking, rudimentary telemedicine usage, essential e-commerce and increased access of online gaming and digital entertainment. It caused a shift in traffic from commercial to residential areas with a significant surge in data and voice consumption. Despite the prevalent stress in the sector, telecom companies continued to provide uninterrupted and superior quality of services to over 1 Billion subscribers, maintaining an uptime of 99.99% on network operations.

COAI has played an active role maintaining an ongoing dialogue with Government stakeholders to facilitate the smooth operation of the industry. It collaborated with the DoT in convincing OTT companies like YouTube, Amazon Prime Videos, Netflix and others to reduce the transmission bit rate from High Definition to Standard Definition.

This helped bring down the traffic back to more manageable levels.

During the lockdown, operators extended a range of benefits such as free talktime credit and validity extension to ensure millions of the low income 2G prepaid users are able to use the services. Many other activities were initiated in support with the Central, State and Local authorities which allowed employees of the mobile operators to conduct essential services during this lock down period. Our thanks goes out to all those people who braved the lockdown challenges to continue all the field work that was required to keep our network up and running during this time.

The industry has been at the forefront even when there were fibre cuts or when cell towers went down. Working with local municipalities, operators provisioned additional capacity by putting temporary Cell on Wheels (CoWs) in places facing congestion or peak traffic.

Needless to say, all this would not have been possible without the robust 4G networks which now covers over 1 Bn of the Indian population as a result of rapid expansion by operators over the last one year. While driving the Hon'ble PM's Digital India dream, the industry has also, simultaneously, taken care of the interests of 550 Mn 2G feature phone who were kept connected even in the remotest corners of the country.



Enable the Enabler:

Telecom sector contributes 6.5 percent to the country's GDP and plays an enabling role for other sectors of the economy, helping the Government achieve its economic and social objectives.

It is now time to accord critical infrastructure status to the industry to help India achieve its target of \$1 trillion digital economy in the next 2-3 years. The progressive National Digital Communications Policy (NDCP) 2018 shows a clear roadmap for the sector and outlines issues which need redressal so that India's digital play is at par with global leaders.

Restore Financial Health:

In pursuit of achieving the stated goals of the government, the association has made specific requests to the government to make the sector

financially robust. Government is aware of the tremendous financial stress being faced by the sector and is working with telcos towards restoration of the health of the sector. We appreciate the support provided by the Government and TRAI - for instance, the offer to the industry of a two-year moratorium on the deferred payment of spectrum instalments, recent increase in International Termination Charges, etc.

The industry appreciates any move to ease regulatory pressure and cost. We acknowledge the continuous support and guidance received from the TRAI, especially to implement Telecom Commercial Communication Customer Preference Regulations (TCCCPR), using the Blockchain solution.

However, these measures are not enough, given the financial burden on the industry, which has exacerbated due to the AGR payments. Other steps are urgently needed.

The operators have paid a heavy amount for the spectrum, and are also paying high Spectrum Usage Charges (SUC), License Fee (LF), USOF and other levies resulting in the sector being over-taxed. There is an immediate need to rationalize the high burden of these Regulatory levies by reducing SUC and Licence Fee to 3% each from the current levels. Prices in India are the cheapest, globally and we hope that the consultation process on Floor pricing, undertaken by TRAI, is completed at the earliest.

Industry's plea to the Government to refund the unutilized input tax credit needs to be heeded on an immediate basis. Provision of soft loan to companies at MCLR rate, using GST input credit as collateral, should be actioned. Further, the issue of imposing GST levy on regulatory payments, such as LF, SUC and spectrum payment instalments, needs to be addressed by exempting GST on these payments.

Immediate rationalization of the costs on the sector, will ensure sufficient investible funds with operators to expand networks and services. As the sector grows and new services are added, it will further fuel the digital economy, thus ensuring that the government also earns more revenue and is able to achieve its economic targets.

Overcoming Road-blocks:

For smooth rollout and proliferation of services, telecom companies require help not only from the Centre but also the States and local authorities. Securing permission to lay fibre optic cables is a significant hurdle in expanding broadband connectivity in the country and needs immediate resolution. There is a need to push for consistent implementation of Right of Way (RoW) guidelines of 2016, across the length and breadth of the country. States and Municipal corporations need to work together with the industry and allow requisite permissions in a time bound and cost effective manner, to expeditiously set up infrastructure to develop a Digital Highway.

Readying Networks of the Future:

Operators are readying 'networks of the future' by deploying 5G technologies, forging partnerships, and developing use cases through 5G trials. New and emerging technologies such as Convergence, Big Data, IoT, AI, AR, Cloud and Robotics are bringing about transformational changes for individuals and enterprises alike. Technology advancements with proliferation of broadband have led to explosive growth of personal data creating opportunities of value creation and socio-economic development.

The planned 5G trials will further help identify India specific use cases and enable partnership models to emerge to actualize the full potential of this technology.

At this juncture when data privacy assumes significance, the Government has tabled the Personal Data Protection Bill 2019 that is currently before a Joint Parliamentary Committee. The industry association had earlier submitted that it will be critical for the Draft Bill to have a balanced approach in ensuring data protection and security, facilitating innovation and also practical provisions on cross border transfer of data. We are hopeful that the same would be considered.

Opportunities Redefined:

The telecom industry for more than two decades, has played a significant role in keeping the country not only connected but also operational, and will continue to drive growth for India's ambition to achieve a \$5 trillion economy by 2024.

Some successes from 5G applications are seen in sectors where pilot tests have been conducted like agriculture, health, education. It is a movement towards "inclusion of the masses" and bringing to them the fruits of technology.

It is an irrefutable fact that the telecom industry is facing severe challenges and as an industry, we reiterate our resolve to overcome these challenges and play a constructive role in nation-building. We will continue to work closely with all our stakeholders which include the Government, Regulator and Consumers to make this Digital India dream a reality.

**Mr. Ravinder Takkar,
Chairman, COAI**

Key Highlights

- During the lockdown, telecom companies continued to provide uninterrupted and superior quality of services to over 1 Billion subscribers, maintaining an uptime of 99.99% on network operations.
- The industry appreciates the support provided by the Government and TRAI - for instance, the offer to the industry of a two-year moratorium on the deferred payment of spectrum instalments, recent increase in International Termination Charges, etc.
- The industry appreciates any move to ease regulatory pressure and cost
- Provision of soft loan to companies at MCLR rate, using GST input credit as collateral, should be actioned
- The industry has been at the forefront even when there were fibre cuts or when cell towers went down.



Vice Chairman's Message

Big opportunity ahead

Looking back at the year gone by, one can say that worst may be behind for the industry. The industry structure (3+1 operators) is starting to settle after a painful phase of consolidation and some much needed pricing correction has also taken place.

That does not mean that we are out of the woods. Pricing still needs to move up to allow the industry to be sustainable and be able to invest in newer technologies such as 5G and serve a Digital India.

India is well positioned to advance to 5G and the deployment of the technology will build a vibrant digital ecosystem driven by innovation. The market opportunity for 5G is vast and the potential of 5G in India is multifold.

5G is vital to India's broader socio-economic aspirations and new job opportunities. 5G can be a catalyst of change, in agriculture, health, education, logistics, financial services etc. as it brings in new age technologies like Artificial Intelligence (AI) and Internet of Things (IoT). 5G will help telecom companies to provide robust connectivity in the deeper pockets of the country. 5G will greatly increase concurrency, decrease latency and improve spectrum efficiency for mission critical communications like medical procedures, online education amongst others.

India however has regulatory, procedural and financial issues to resolve for the successful deployment of 5G alongside the rest of the world. For this, the industry will need the support of the Govt. to ensure that 5G spectrum is available and affordable so that the industry is financially healthy and is able to make the large investments required for 5G, which will require millions of sites.

Humanity is faced with an unprecedented challenge in the form of the COVID-19 pandemic. As we look for solutions to overcome the pandemic and adjust our lives to the new normal, digital connectivity and platforms have emerged as key enablers. And telecom networks, which are the backbone of these digital platforms, have become even more important.

While the Indian telecom industry has always been a key driver of the nation's economic growth, the ongoing COVID-19 crisis has brought its contribution to the forefront. The industry, despite its challenges and deep financial distress, has kept a nation of 1.3 billion connected in this difficult hour. Engineers and ground staff of telecom operators have kept the lights on 24x7 while India stayed safe inside their homes.

Despite the surge in voice and data traffic, the industry has worked tirelessly to deliver 99% plus network availability in every corner of India. It has made sure everyone can call their loved ones, access the internet, children can attend school virtually and businesses can continue to operate from homes. Even for hundreds of millions of customers at the bottom of the pyramid, the industry has lent a helping hand by extending validity and crediting free talk time.

On behalf of the industry, I must commend the central, state governments and the telecom regulator for supporting and encouraging the industry to accomplish this massive task. We assure them that the industry remains fully committed to keep India connected over one of the biggest digital backbones in the world.

The Government must make the Indian telecom sector an attractive destination for investors, where investors must get a return on their investments, by rationalising the taxes currently levied on the telecom sector which is currently one of the most taxed sectors in all of Asia. The industry requests support from the government to take steps to make the telecom sector sustainable.

We can only win as a team

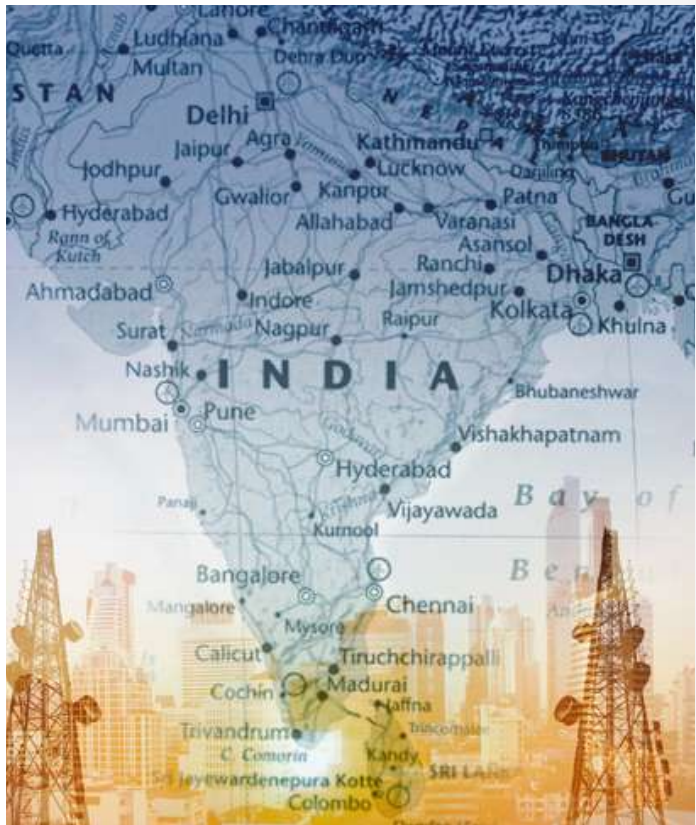
Healthy partnership is yet another critical element for a healthy industry. Highly inter-networked relationships synchronize the strength of every sector and drives innovation.

Partnerships and an open architecture approach will enable all stakeholders to work better together than isolated initiatives. The industry needs to share and collaborate deeper to win together. A strong ecosystem of equipment providers, application providers, mobile network providers, streaming platform providers with strong partnerships and collaborations will help develop a connected world where telecom and internet touch everyone's lives.

To conclude, I believe, the first step in the direction is, that the industry should move from a challenging past to a hopefully, remarkable tomorrow. To make the sector healthy, the government must continue to extend its support as well as provide financial relief at the earliest.

On the part of the industry, there should be specific deliverables in line with the government's digital India vision. Last but not the least, I join the stakeholders in extending my appreciation and thanks to the COAI team for taking forward the industry's agenda and wish them the very best for the year ahead.

**Mr. Ajai Puri,
Vice Chairman, COAI**



Key Highlights

- Despite the surge in voice and data traffic, the industry has worked tirelessly to deliver 99% plus network availability in every corner of India.
- Even for hundreds of millions of customers at the bottom of the pyramid, the industry has lent a helping hand by extending validity and crediting free talk time.
- The industry structure (3+1 operators) is starting to settle after a painful phase of consolidation and some much needed pricing correction has also taken place.
- The market opportunity for 5G is vast and the potential of 5G in India is multifold.
- The Government must make the Indian telecom sector an attractive destination for investors.

From Director General's Desk



“

It is not the strongest of the species that survives, not the most intelligent that survives. It is the one that is the most adaptable to change.

— Charles Darwin

As we go through the COVID-19 pandemic, it has become abundantly clear that adaptability is the key to survival. The Telecom Sector, that has had to adapt to many wrenching changes over the past 25 years, found itself challenged with yet another challenge of global proportions! In the current situation of the pandemic, the industry found itself almost as 'the last man standing'. As the country went into quarantine with restricted movement and new acronyms like WFH slipping into our vocabulary, the resilience and ubiquitous mobile networks came to be the lifeblood of the nation. When even such vaunted services like the Postal Service and Railways, which no one thought would come to a standstill in their lifetimes, came to a grinding halt, the mobile networks continue to function like silent sentinels of the nation's economic and social health.

Battered by a ruinous price war, unsustainable debt, diminishing profitability, impoverishing government levies and taxes, company bankruptcies and the like, it was a miracle that the mobile networks would be able to withstand the increased traffic loads unleashed suddenly on the networks by the COVID-19 pandemic. But stand and perform they did. Working closely with the Department of Telecommunications (DoT), TRAI, MHA and other government agencies, the Telecom Service Operators (TSPs), ensured customers and citizens alike, that the mobile networks would not fail them in their hour of need.

TSPs along with their OEM partners and supporting vendors began preparations much before the event. Seeing the storm clouds emerge in other parts of the world, Operators began to put into practice their Business Continuity Plans (BCPs). This ensured necessary backup facilities, presence of key employees, redundancy, resilience, contingencies, etc., were all reviewed and put into operational mode immediately. When the intensity of the pandemic increased in India, work place sanitation and hygiene practices were put into effect and finally non-essential employees, accounting for over 80% of the work force, were sent to work from home. When the Honorable Prime Minister issued his first quarantine orders for the nation, the massive movement to WFH, placed unprecedented shifts and loads on the networks. Working with the DoT, Operators quickly pinpointed some of the issues and worked overnight with the DoT to request streaming service companies to reduce their streaming content from High Definition to Standard Definition. With their active cooperation, load factors were brought to manageable proportions. As days progressed, the nation saw a mass exodus of day laborers attempting to return home. To address the needs of these and others, TSPs immediately rolled out free services to ensure connectivity was not disrupted for this vulnerable part of the population.

This part of the story would remain incomplete if we did not acknowledge the yeoman service provided by our front line team members tasked with maintaining the uptime of the networks by repairing faults, fiber cuts, moving spare parts and delivering essential items like diesel for the generators. Many literally faced the ire and punishment from local law enforcement personnel during the early days of the quarantine for moving to complete their tasks. Here again, working closely with the DoT, local TERM cell representatives and local law enforcement, these early challenges were quickly resolved. Many of these team members walked miles, carrying heavy loads on their backs to deliver diesel and repair cell towers, because transportation was not available. These are the unsung heroes of our efforts.

While the networks were proving their mettle in the midst of the pandemic, the danger was that we would forget a major milestone in the history of the industry and of COAI. It was 25 years ago that India stepped out into a path of economic liberalization. The Telecom sector was the first to benefit from this visionary call of the government to open the sector to private participation. With the opening up of the sector, the immediate response was one of euphoria. Several companies were given licenses to provide mobile and landline services in the four Metro areas and 21 LSAs. There was hardly an international Operator of repute that was not represented in India. It was during these heady days that COAI was born to represent the interest of the private Operators with the DoT (then the monopoly service provider). Much has transpired in those 25 years. This space would be inadequate to transcribe the full or even a truncated history of these years. Suffice it to say that in the span of 25 years, the TSPs put India at the forefront of global subscriber growth, data consumption, network expansion, technology and process innovation and adoption, among other things. Today, the Telecom sector is serving a huge subscriber base of approx. 1.2 billion with a strong network capacity of over 5,96,000 mobile towers and more than 22 lakh BTSs in the country. All this was possible with an investment of over INR 11.25 lakhs crore by the telecom companies.

When the history of this period will have been written, it will showcase the entrepreneurial and innovative spirit of its pioneers, the dogged tenacity of its Operators, the vision of its founders and investors, and the resilience of the industry to weather and deal with several body blows over the years. The support, guidance and enabling policies of the Government and the Regulator as they dealt with the challenges of dealing with this emerging industry are part of the success story of the sector.

With the help from State Governments, we managed to get the number of “faulty” BTSs down from approximately 800 from before the quarantine to nearly 290 to ensure smooth connectivity to the citizens. The standard operating procedure issued by the Home Ministry facilitating the movement of staff and logistics to maintain the network was a significant relief. Include this in the previous para indicating statistics.





STATUS ON POLICY AND REGULATORY ISSUES

Though significant steps have been taken by all the stakeholders to deal with the crisis situation, there are some more pending issues which need immediate attention for the telecom sector to sustain and stay strong in future.

While the telecom industry has been facing severe financial challenges, last year's monumental judgement by the Hon'ble Supreme Court on Adjusted Gross Revenue has appeared as an additional liability of billions of dollars on the operators in addition to the tremendous debt that has accumulated as a result of extremely high prices of spectrum. The cumulative effect of all this including the high duties and levies imposed on the sector has placed the industry in a precarious financial position.

With onset of COVID-19, there has been a severe disruptive impact on the global supply chain, demand and supply elements and most importantly, on the cash flows of the companies due to the slowing economic activities. This downturn will have an impact on all payments including those of employees, interest, loan repayments and taxes.

In such a situation, the industry is in a dire need of immediate support from the Government, Given the fact that over 30% of all top line revenue goes back to the government by way of levies and taxes, the telecom industry had approached the Ministry of Finance with key requests, including providing soft loans against GST input credit to address the immediate liquidity crunch, reducing the SUC by 3% for all TSPs, reducing Licence Fee (USOF Contribution) from 8% to 3%. The industry had also urged to exempt the levy of GST on

License Fees, SUC and Payment of Spectrum acquired in auctions. We have also sought exemption of service tax on amount of LF/SUC payable by telecom operators in compliance with Hon'ble Supreme Court AGR Order. We believe that these measures will not only help the industry emerge from its present financial distress but also place it in a situation to invest in needed network roll outs, coverage, capacity, innovation and new services that benefit the customer and the nation. It will help propel the nation to retain its place as a powerful leading global leader in networks and services as we prepare to take on the challenges of what emerges as new network, business, financial, logistics, economic and social configurations post COVID-19.

The NDGP 2018 (National Digital Communications Policy) is a forward-looking policy which deals with creating new digital reforms comprehensively. Implementation of the policy at a rapid pace will facilitate the ability to raise the proposed investment of USD 100 billion on favorable financial terms, which will not only make access to communication services easy and affordable but will also breathe in a new lease of life into the already debt ridden and financially distressed telecom sector. The proper execution of the policy will not only ensure the sector's long-term sustainability but will also prepare the sector for widespread adaptations needed for welcoming futuristic technologies. One of the remarkable implementation of NDGP initiative is making the SACFA process paperless through the SARAL SANCHAR portal, which has helped in easing the process and significantly improved efficiency, resulting in faster clearances and transparent working.



The Right of Way Rules, 2016, are certainly a progressive and forward-looking step to achieve the Digital India vision and allows for the uniform growth of telecom infrastructure in all States, as it provides for the process for grant of permissions for the installation of underground and over ground telecom infrastructure, Single Window Clearance via an online portal, the appointment of nodal officers and simplifying documentation. Till date, 16 States have aligned their Telecom Infrastructure policy with RoW Rules, 2016, that have streamlined hassle-free Right of Way processes. 12 states have also developed the online portal for easing RoW permissions. Some of the Telecom Infrastructure Policies like Odisha, Assam, Himachal Pradesh, Tamil Nadu Govt. Order, etc. are very progressive and help in an exponential growth of Telecom Infrastructure across the state. The industry along with the Government should now focus on this development across the entire country.

Fiberization is a must to address the digital divide and to reach all parts of the country to empower the citizens. Since all the cell towers in the country at present are not connected through fiber due to its paucity, there is an issue. Moreover, in last four years we have not had any increase in backhaul spectrum, hence, we are dealing with constrained factors and have to manage the quality of services based on existing capacity, for

everybody's good. Growth of fibre is the foremost priority for the ongoing exponential increase in data demand and improved quality of services. Fiberization will surely meet the present requirement of bandwidth and future technologies such as 5G, emerging technologies etc. Apart from this, early allocation of E & V bands to meet the backhaul requirements is also a pending request of the industry which is being considered by the Government.

Last year, 5G became a mainstream topic and rebooted the discussion of the value that telecom brings to society including innovation, security, and inclusion. World Radio Conference 2019 was held from October 28, 2019 to November 22, 2019 in Sharm-el-Shaikh, Egypt. The outcome of the WRC-19 has been very pragmatic, especially in the identification of mmwave bands (>24GHz) for IMT/5G. This identification and the resolutions have enabled efficient use of this spectrum between multiple services for national usage. The Indian Government and industry also actively participated in the same and are discussing 5G spectrum pricing, test cases, test beds and adoption of use cases suitable to India in the coming year. The stakeholders have submitted their test applications to DoT to begin the 5G testing, which due to the pandemic is on hold for some time, but is expected to begin shortly.

There was some misinformation regarding the emission levels of 5G technologies floating around for some time. However, the latest update from ICNIRP published in March 2020 re-iterated that the safety guidelines retain a high level of protection with limits set well below the thresholds for established hazards for all radio frequencies from 2G to 5G. ICNIRP noted that the exposures from 5G networks are well below these thresholds and stated – “The most important thing for people to remember is that 5G technologies will not be able to cause harm when these new guidelines are adhered to.” This is based on scientific reports prepared for the World Health Organisation (WHO), the European Commission, national expert groups and continuous monitoring of new research. The process has taken seven years and there was a public consultation in 2018 with more than 1,000 comments from over 120 organisations.

We must now expect that the coming years will usher in possible disruptions, hitherto unconceivable. Technology innovations, new revenue streams, new applications, new network configurations, new competitors, will all require significant investments to propel India to newer

heights of economic growth and prosperity. With progress in Artificial Intelligence, Machine Learning and intense interest in smart technologies, IoT and Robotics are also coming into the mainstream. Enterprise as a major revenue stream will also provide fresh opportunities for TSPs. This will bring many opportunities for operators in the form of AI based solutions for applications, services and underlying infrastructure. This may also be adopted to support the new digital infrastructure, improve customer service and reduce customer churn.

COAI and its Members and Associate Members will continue their focus on building the new age digital infrastructure to support the nation and providing value to their customers, advocating for a stable, long term, sustainable, policy and regulatory environment which will promote innovation and orderly growth for a fully connected and digitally empowered India delivered through a financially strong and viable industry. We also look forward to continuing our partnership with the Government and Regulator to achieve the above vision.

OTHER ACTIVITIES OF THE ASSOCIATION

Taking forward the momentum from last year, COAI organized the third edition of the country's largest iconic Mobile, Internet, and Technology event in India and South Asia's biggest technology event – India Mobile Congress 2019. The event took place under the active support, guidance, and leadership of Shri Ravi Shankar Prasad, Hon'ble Minister of Communications, Law and Justice and Electronics and Information Technology and actively supported by Shri Anshu Prakash, Secretary, DoT and Chairperson of the Digital Communication Commission as well as with the support of several other Government Ministries. With more than 250 plus speakers, discussions pivoting on 5G, Intelligent Edge, Immersive World, Privacy & Ethics, Autonomous things, Smart spaces, Augmented Analytics, Health & Future Logistics, the event drew luminaries from industry, Government – both

domestic and international as well as many speakers of international repute. The event also witnessed technology showcases, use cases and also provided a platform for budding entrepreneurs to gain exposure and build connections with special focus on start-up pavilion.

COAI has participated and partnered with other entities in the co-organization and co-creation of various Seminars and Workshops on issues of common interest and benefit to its members and for generating subject matter awareness amongst consumers. COAI and its members also continued active participation in Organizations such as CII, FICCI, ASSOCHAM, NASSCOM, GSMA, TSDSI, TCOE, TSSC, amongst others, as well as activities of many telecom events in India. To keep pace with the current situation of the

Covid-19 pandemic and following the social distancing norms, COAI organized various webinars to discuss the changing world of telecom during these critical times.

The COAI Executive Council headed by Chairmen, Mr. Balesh Sharma, Mr. Ravinder Takkar, Vice Chairman, Mr. Ajai Puri and comprising senior representatives from all member operators, met several times over the last year to deliberate on a variety of issues impacting the telecom industry. They were ably assisted by proficient advice from the various **Working Committees** that have been set up in COAI.

I also want to express my deep appreciation for to **all the Committees and Working Groups** and their **Chairmen and Vice Chairmen** for their unstinted support and cooperation. We are grateful to you all for taking time out of your busy schedules to contribute towards various industry issues and helping the Association in representing them in a proficient and timely manner.

I would like to thank our Chairmen, **Mr. Balesh Sharma, Mr. Ravinder Takkar** and the **Vice Chairman, Mr. Ajai Puri**, for their personal involvement and support in all the activities and initiatives of the Association for the last year, especially in the face of the many challenges faced by their respective companies and the entire industry during the year. Both of them have given generously of their time and resources to provide personal support and guidance for the Association. We request their continued support and guidance in future as well.

I would especially like to record my deep appreciation for the sustained efforts and support of the **COAI Secretariat** team who have always been fully committed to the task before us and have always been ready to take up new challenges for the Association and execute them smoothly, efficiently and with excellence. We witnessed great team working during the COVID-19 lockdown. I deeply appreciate all of their efforts in contributing significantly to all the achievements of COAI.

Mr. Rajan S. Mathews
Director General, COAI

Key Highlights

- Seeing the COVID-19 emerge in other parts of the world, Operators began to put into practice their Business Continuity Plans (BCPs).
- TSPs immediately rolled out free services to ensure connectivity was not disrupted for this vulnerable part of the population.
- While the industry has been facing severe financial challenges, judgement by the Hon'ble Supreme Court on AGR has appeared as an additional liability of billions of dollars on the operators.
- Over 30% of all top line revenue goes back to the government by way of levies and taxes
- The telecom industry had approached the Ministry of Finance with requests, including soft loans against GST input credit to address the immediate liquidity crunch, reducing the SUC by 3% for all TSPs, reducing Licence Fee (USOF Contribution) from 8% to 3%.
- Fiberization is a must to address the digital divide and to reach all parts of the country as it will meet the present requirement of bandwidth and future technologies such as 5G, emerging technologies etc.



Digital Networks - The Health and Wealth of the Nation

The rapid adoption of the mobile phone, internet, social media platforms and expansion of digital payments have empowered hundreds of millions of Indians. This has been due to numerous initiatives by the Government and the industry to bridge the digital (and socio-economic) divide.

The success of such initiatives hinged on the availability of telecommunications infrastructure. At a time when every other service was impacted, telecom responded comprehensively to the challenges on all fronts. Over the past two months, as most people were working from home due to the COVID-19 threat, it was the strength of the telecom network that kept the people and India going. The data services – video calling, e-education for children, binge-watching web series – ensured that people at home could work, play or study on the strength of high bandwidth connectivity. The voice network ensured migrants in cities could stay connected with their families in the villages.

The Telecom industry has demonstrated that it has the resilience required to keep the nation connected, amidst a crisis. The sector have given a new meaning to telecom being the 'lifeline of the country' by ensuring that everyone remains connected in this hour of need and that we can stay on course for the Industrial Revolution 4.0.

Connectivity to enable Work From Home

As the first phase of the lockdown started data usage shot up by 25%. Home Broadband customers were upgrading to faster speeds and larger data plans to support their work from home requirements. Online classes, watching video content and being updated with the latest news, helped people keep up with their daily routines. B2B customers were utilizing 4G dongles, home fibre connections and larger enterprise bandwidths. From an average monthly wireless data consumption of 6900 PB at the quarter, ending December 2019, consumption increased to about 8280 PB as on April 2020.

The Telecom industry responded quickly to successfully address the surge in demand for data and voice. It ensured citizens were able to work from home (WFH). Telecom companies worked 24*7 to ensure networks remained available 99.99 per cent of the time. Out of a total 22 lakh BTSs in the country, we had 800 nonfunctional BTS, but by the time of lockdown these were brought down to just 290. Cells on Wheels were deployed, wherever permitted and severed fibre optic cables cases were brought down from an average of 100 per day to just seven. The movement of vehicles with diesel were facilitated to ensure DG Sets could run without power breakdown.

Telecom companies also urged internet consumers to use data responsibly to ensure critical services could run smoothly. Over-the-top (OTT) platforms like Netflix, Prime Videos and others were requested to reduce the streaming quality from high definition to standard definition, and they complied. We also urged the Government to consider self-digital-KYC for new SIM card connections and approached the state and local administration for opening retail recharge points. Meanwhile, TSPs incentivized users to recharge for other subscribers. Other channels like ATMs, medical stores, grocery stores, etc. have also been activated as recharge points. Over the last few weeks, TSPs have delivered several initiatives, including new capabilities of SIM delivery to home, doorstep KYC, "Work from Home" solutions, conferencing and security services. All the above measures have received numerous compliments, and consumers are generally happy about the network and appreciative of how TSPs have stepped up the quality and experience during the COVID-19 crisis.

TSPs continue to monitor the developments closely and introduce adequate measures to address them.

Telecom Warriors- The Unsung Heroes

The health of our networks were maintained to a large extent by the 'Telecom Warriors,' the staff on the ground who braved the pandemic and initial communication gap between the senior and executing law enforcers to ensure secure and uninterrupted connectivity. Which, in turn, helped, the warriors in white coats. Primary and secondary health care centres including the health and wellness centres in affected areas were linked with a Telemedicine Hub via telephone/ video call to facilitate consultation between the patient and the provider, which was guided by Ministry of Health and Family Welfare Telemedicine Guidelines. At a time when doctors in hospitals were busy treating patients while covered in layers of protective clothing, other doctors could keep track of their patients with minor ailments by tele-consultation. Till quite recently, these were just terms, but in the space of a month they became a reality for thousands of Indians. All this happened thanks to a network with high bandwidth that has been built over the years.

Reducing stress and enriching relations

By being connected to a high-speed broadband network, millions were able to reduce the stress of being cooped up at home for days on end by getting access to a variety of entertainment options, news and health developments across the world.

In a situation, where people got stuck at different locations, telecom provided not just voice but video connectivity also. It led many staying alone to pick their phone book or contacts and call them, just to enquire about their wellbeing. The use of telephone and apps using the telecom network has created a circle of togetherness which according to psychologists is critical in a period of isolation.

Creating New, Meaningful Experiences

The opportunities that the telecom network created are immense and unending. Being at home also meant also opened up new experiences in the two months of lockdown. This includes getting married while in different cities; having birthdays when relatives and friends from across the world join in and learning new skills. The list could range from taking online lessons on Coursera to simply cooking that new dish after seeing a YouTube video. Add to that connecting with neighbours, learning painting, dancing or practicing yoga. Even ordering medicines from the neighbourhood chemist by placing an order on WhatsApp.

Online gaming has also gained significant traction during the lockdown as a preferred leisure activity, connecting family and friends. Smartphones empowered gaming, riding on the increased mobile penetration, robust internet connectivity, low data costs and the improvement in the quality of games on offer.

Financial concerns: Enhancing the Wealth of the Nation

Given the ever-increasing demand for data and services, the Government must address the issue of financial distress of the sector and provide immediate and timely relief, so that telcos can make necessary investments to strengthen the networks further to meet the increasing demands of the consumers.

The financial crisis, however, has not dampened the resolve of the industry to build a world class telecom infrastructure in India and function as a vibrant, essential component of the nation's economic and communications health and well-being. The contribution of telecom to the country's annual GDP is around 6.5 per cent and expected to go up to 8 per cent, as per GSMA. The GSMA's recent annual 'State of the Industry Report on Mobile Money' presents a lucid data backed explanation of how the growing mobile telephony landscape has led to greater financial inclusion and impact on lives, economies and innovation, especially in emerging markets. In India, too, mobile money has ensured more women are using financial services, low-income households are accessing essential utility services and small land holding or marginal farmers are getting paid more quickly and conveniently, eliminating the middlemen.

We are thankful to the Government for the various policy initiatives towards helping achieve Digital India targets. The National Digital Communications Policy, 2018, seeks to unlock the transformative power of digital communications networks in order to achieve the goal of digital empowerment and improved well-being of the people of India.



Future: The Network for Health and Wealth-Building a New India

Our Hon'ble Prime Minister Shri Narendra Modi's vision of Digital India and his stress on 'Jaan hai tho Jahan Hai' is a guidance for the telecom industry. The sector responded to this clarion call of the Hon'ble Prime Minister and is helping to ensure that the physical and mental health of billions of Indians is protected during the ongoing pandemic. The industry firmly understands the old proverb and an appropriate one for all of us today —'Health is Wealth' and it applies to the nation as well. WFH, online education and sundry online activities, including limited e-commerce activities, have not only helped in maintaining the well-being of the people of the country but have also ensured that some form of economic activity is maintained with the sector enabling 30-35% of the GDP during the period. Banking services and limited BPO/KPO (that were allowed to open up) and content and consultancy services were able to perform activities through a healthy network maintained by the telecom warriors.

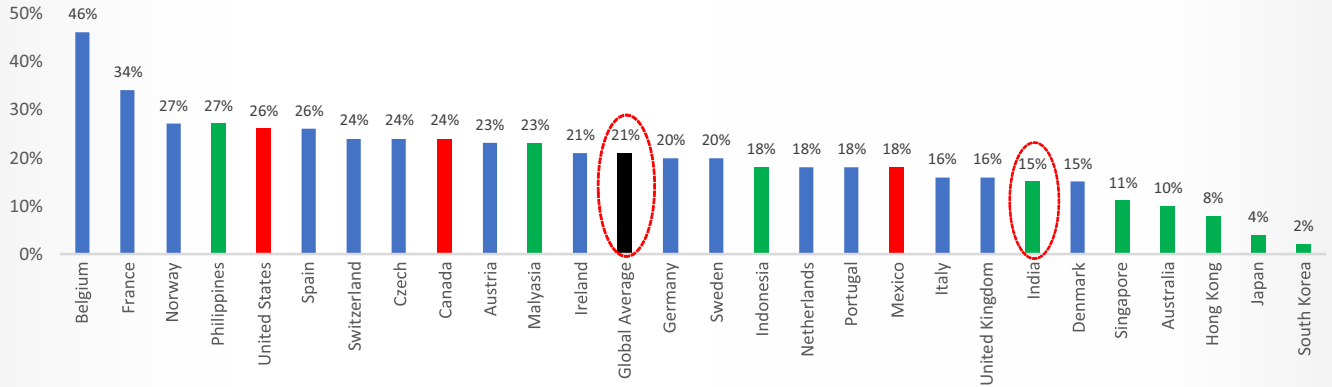
Going forward, AI-linked technologies such as smart transport and traffic management, smart manufacturing, smart agriculture, smart healthcare, autonomous vehicles, drones and telemedicine or remote consultation between doctors and specialists will be the building blocks of a sustainable future.

Conclusion

Telecom operators have played a vital role in ensuring that rural India surpasses urban India in internet penetration. Now, there are no happy hours on mobile internet; every hour is a peak hour. The telecom sector is working to transform the country into a digitally empowered society and knowledge economy even when the pandemic threatens to cripple the global economy and social infrastructure.

COVID-19

I. VPN Usage Growth during COVID-19 Crisis

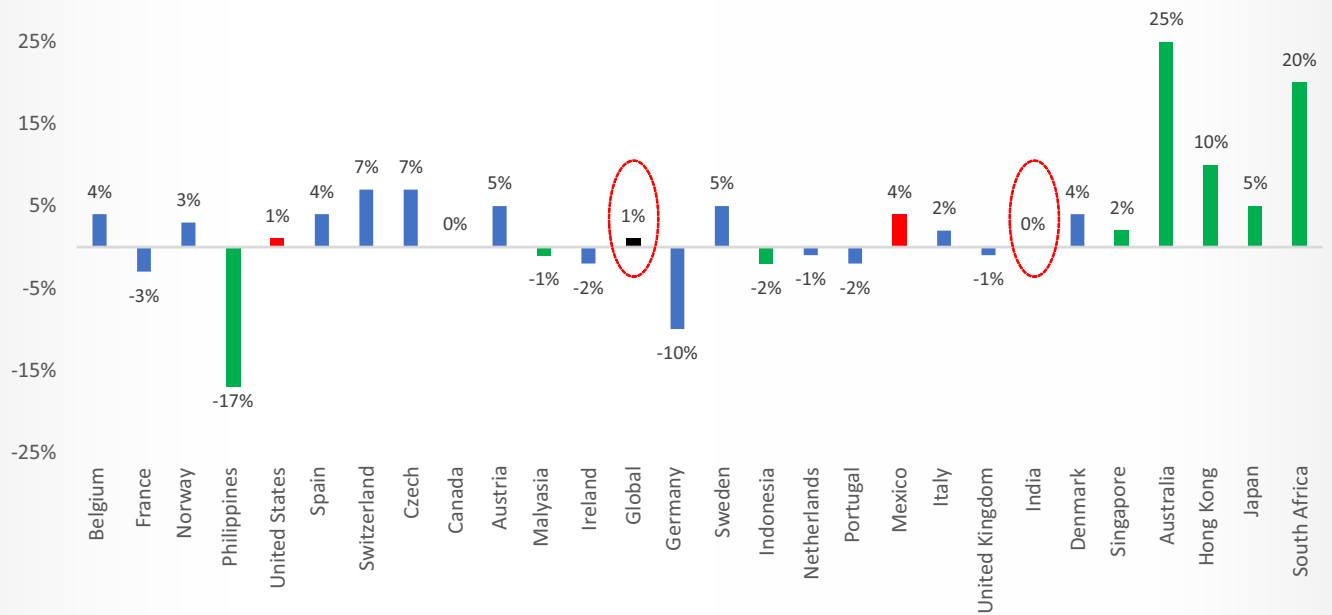


Source: ExpressVPN,
* Derived from aggregate sum of data transferred

Key Observation:

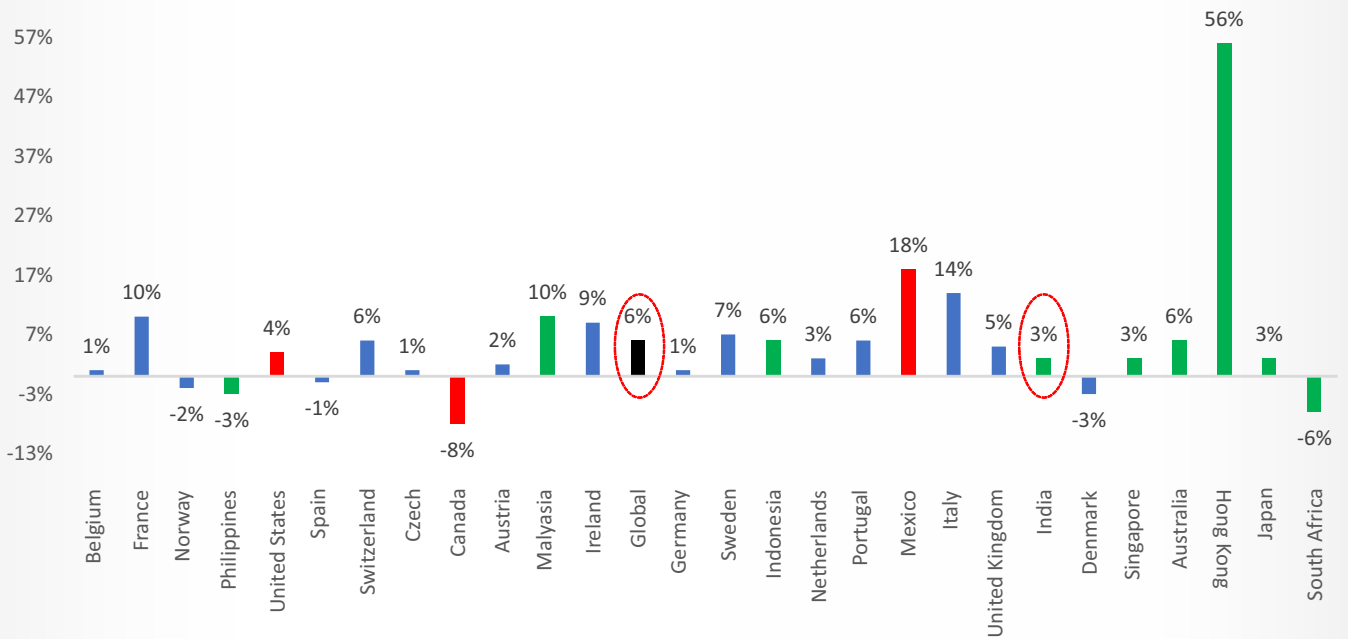
15% growth in India on VPN usage during COVID-19

II. Change in Internet Speed for Fixed Services



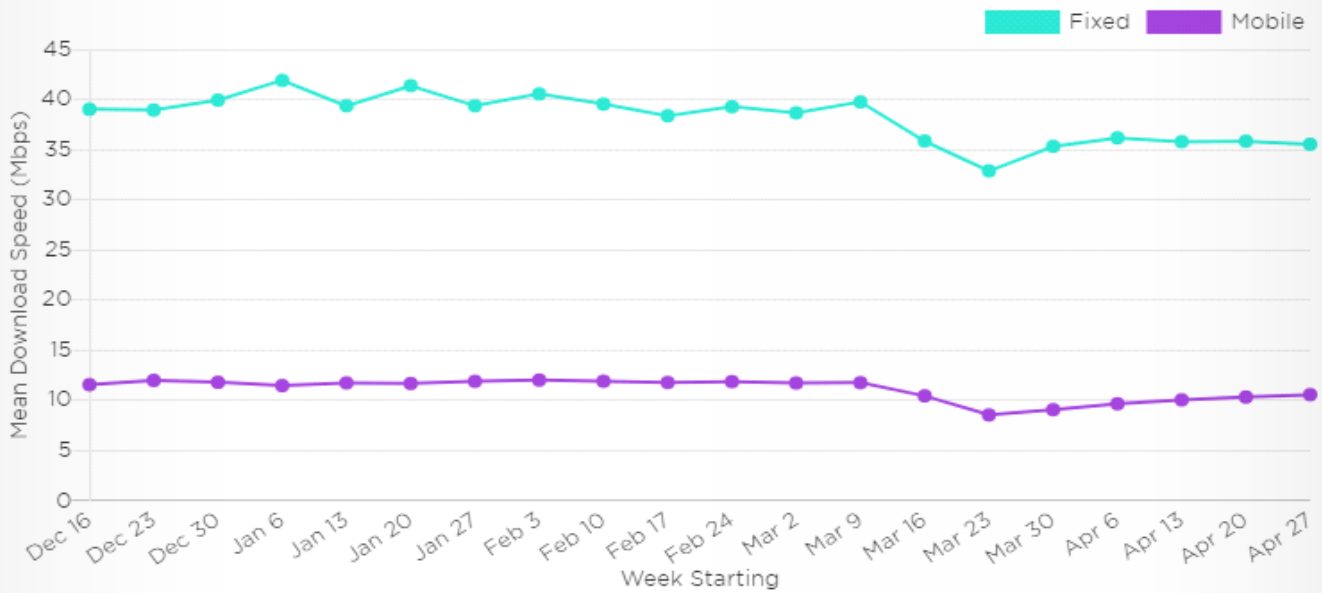
Source: OOKLA
Note: Comparison March 2 with June 08, 2020 Speeds

III. Change in Internet Speed for Mobile Services



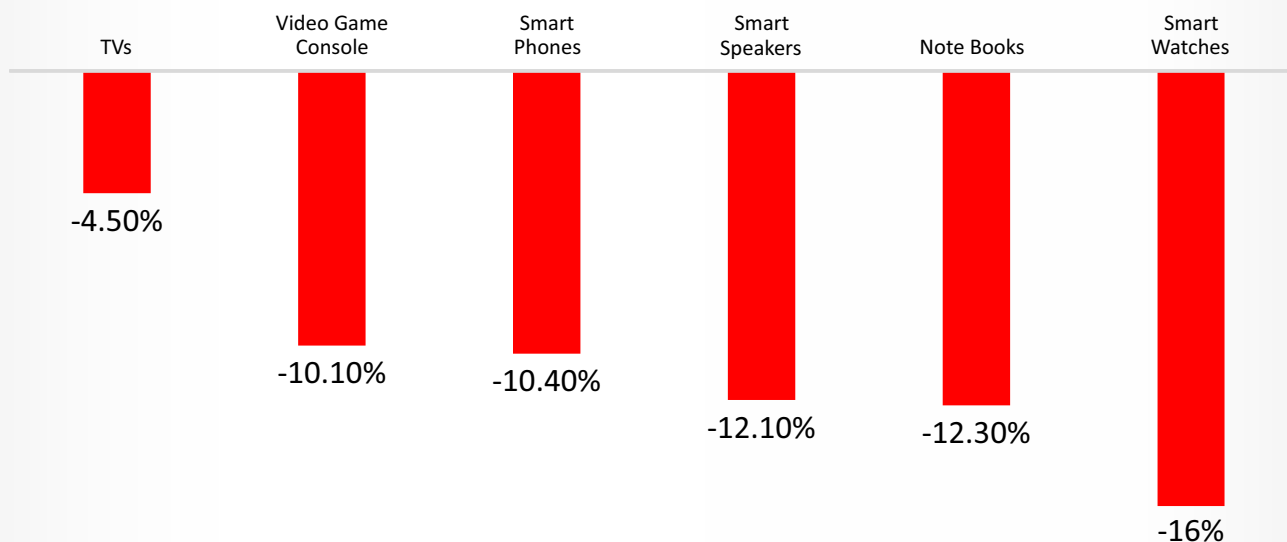
Source: OOKLA
 Note : Comparison March 2 with June 08, 2020 Speeds

IV. India Internet Performance



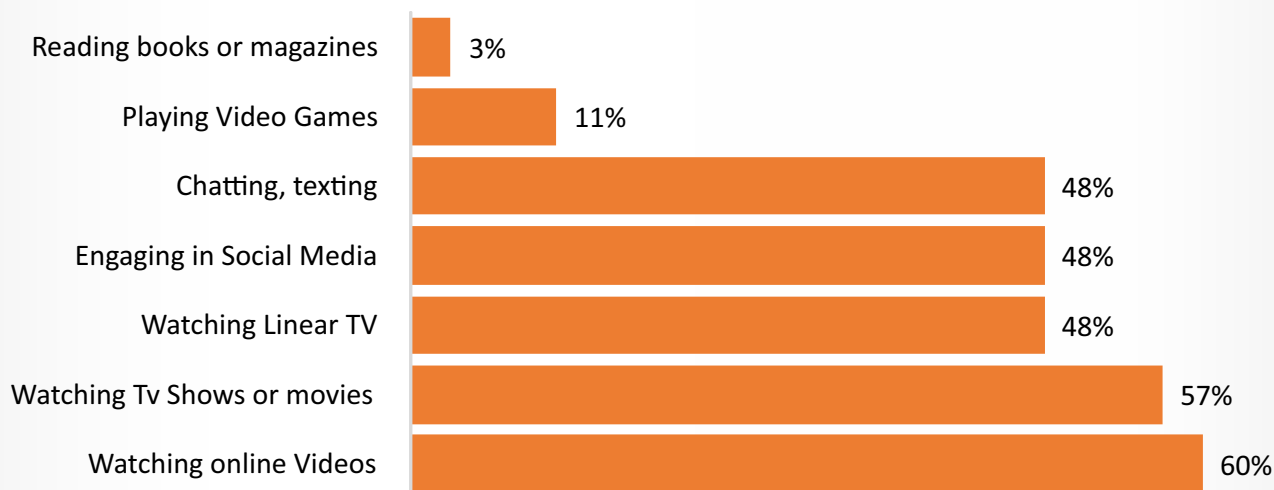
Source: OOKLA, Speed Test

V. Estimated Impact on Global Tech Industry Shipments in Q1 2020



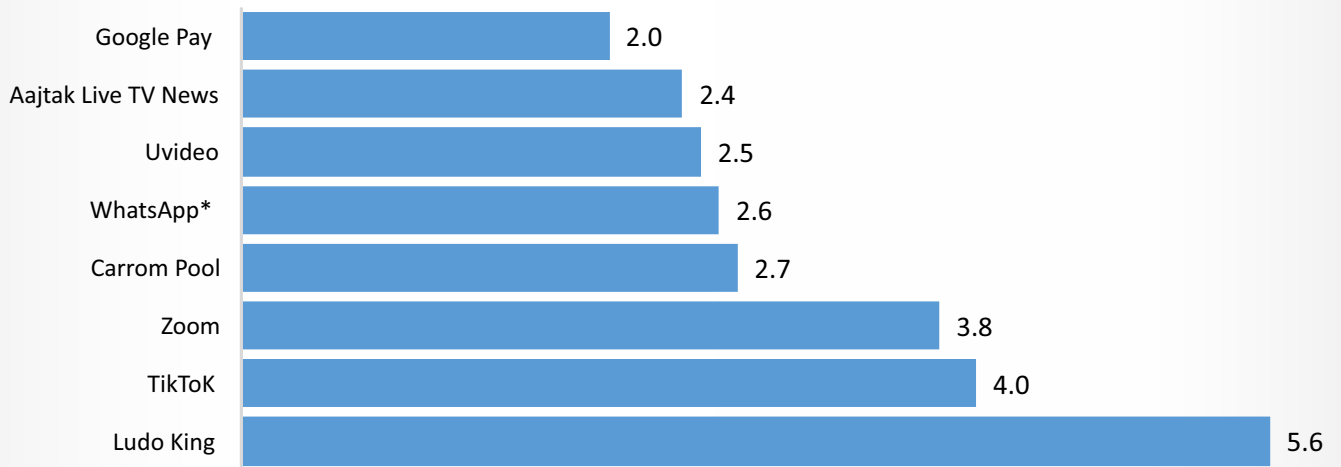
Source: TrendForce, Statista
Smart Phone forecast refers to production Volume instead of shipments

VI. Net Change in expected media Consumption among Indians in the two weeks following march 30, 2020



Source: McKinsey & Company, Statista
Note: Survey of 582 Indians March 23-30, 2020

VII. Most downloaded apps in India from March 26 to April 1, 2020 (in million downloads)



Source: priori Data, Statista

Note: Apple and Android store* and related

Indian Telecom Industry - An Overview

I. Telecom Industry – Contribution to India

Lowest voice & data rates in the world (ARPU Rs. 74)

Source: TRAI PIR

Over 500,000 villages covered

Source: DoT, PQ

Contributes 6.5% to India's GDP

Source: GSMA



Among the highest contributors to Govt.: nearly INR 58,000 crores pa
Source: TRAI, COAI estimates

2nd largest private sector investment in infrastructure – INR 11.24 Lakh crores
Source: DoT, PQ, COAI Estimates

Investment in Spectrum Auctions since 2010: INR 3,68,000 crores
Source: DoT/WPC

Among Highest contributors in FDI in last two decades INR 218,047 crores
Source: DIPP

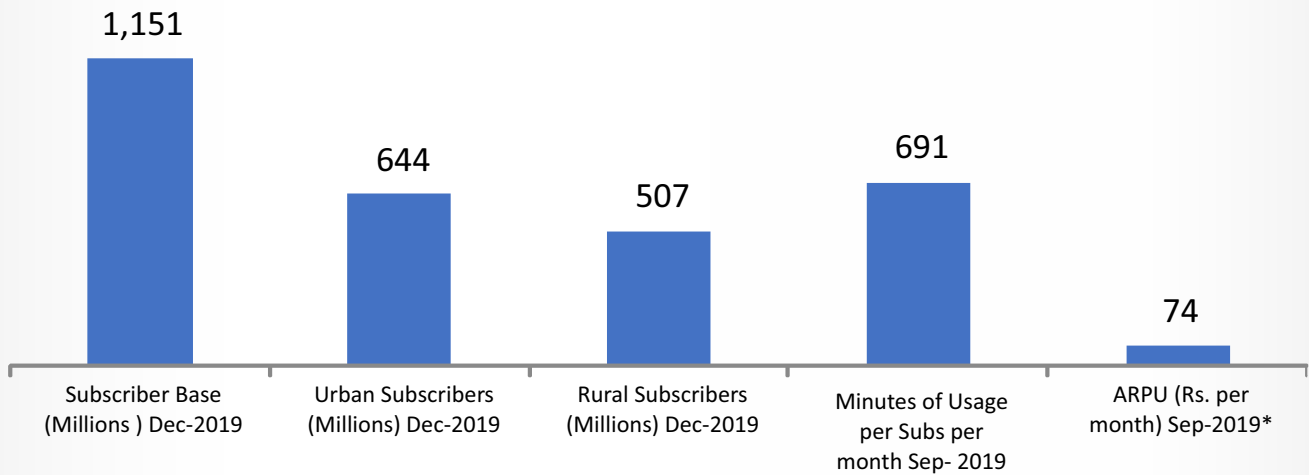
Contributes directly to 2.2 Mn employment and indirectly to 1.8 Mn jobs
Source: GSMA

Source: GSMA The Mobile Economy India Report, 2016, DoT, Industry Estimates, TRAI, PQ= Parliament Question

Note: 1) TRAI Excludes the IUC and Roaming Settlement Charges while calculating the ARPU.

2) Contribution to Government includes L.F, SUC and GST.

II. Key Statistics of the Wireless Industry in India

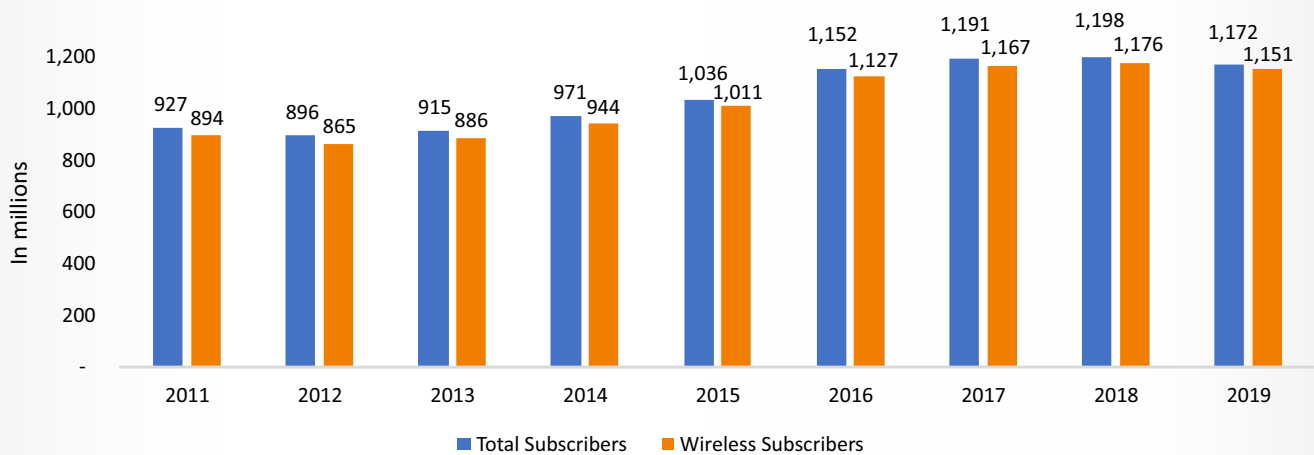


Source: TRAI

Note: * TRAI Excludes the IUC and Roaming Settlement Charges while calculating the ARPU

III. Industry Subscriber Figures

A. PAN India Total and Wireless Subscribers



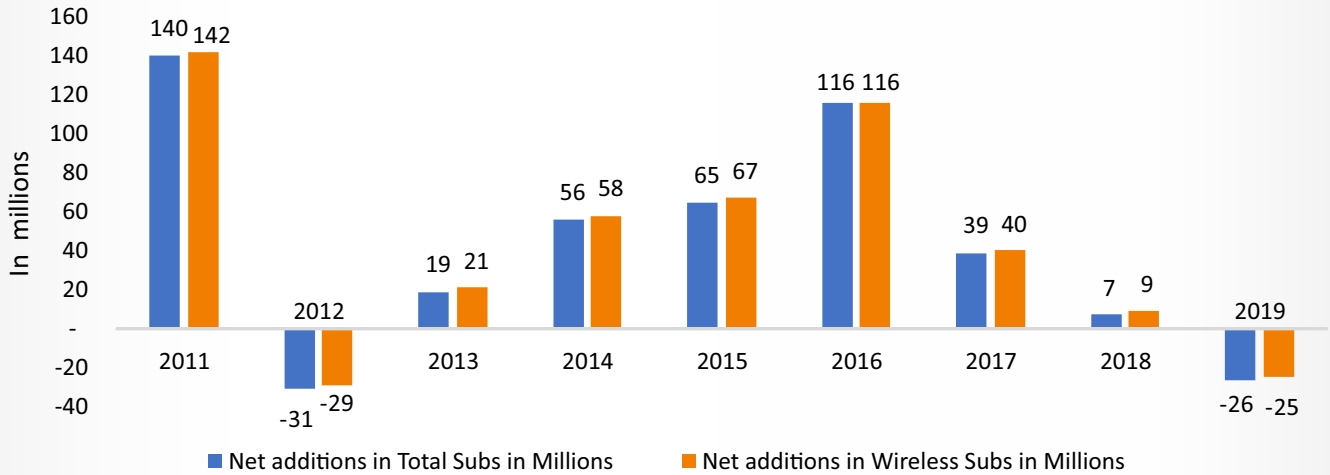
Source: TRAI Subscription Data

Note: All the data is as of December 31st, as per TRAI Reports

Key Observation:

26.4% increase in total subscribers between Dec 2011 & Dec 2019 with CAGR of 3%. While the wireless subscribers increased by 29% between Dec 2011 & Dec 2019, with CAGR of 3.2%.

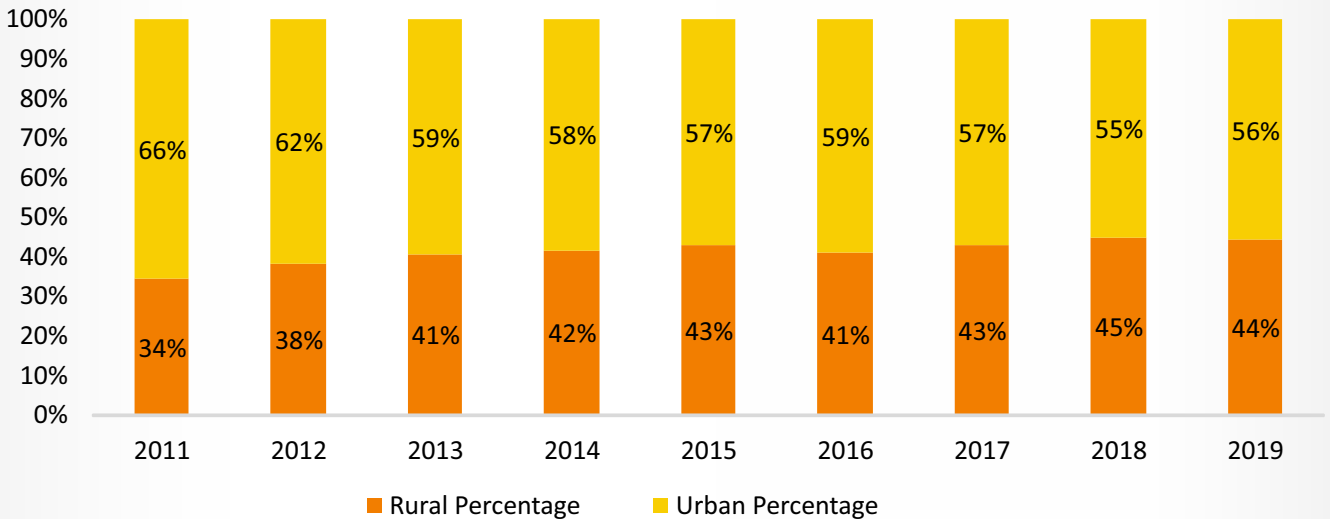
B. PAN India Total and Wireless Subscribers - Annual Net Additions



Source: TRAI Subscription Data

Note: Subscriber Figures are as of December 31st, as per TRAI Reports

C. Wireless Rural & Urban Subscribers as % of Total Wireless Subscribers



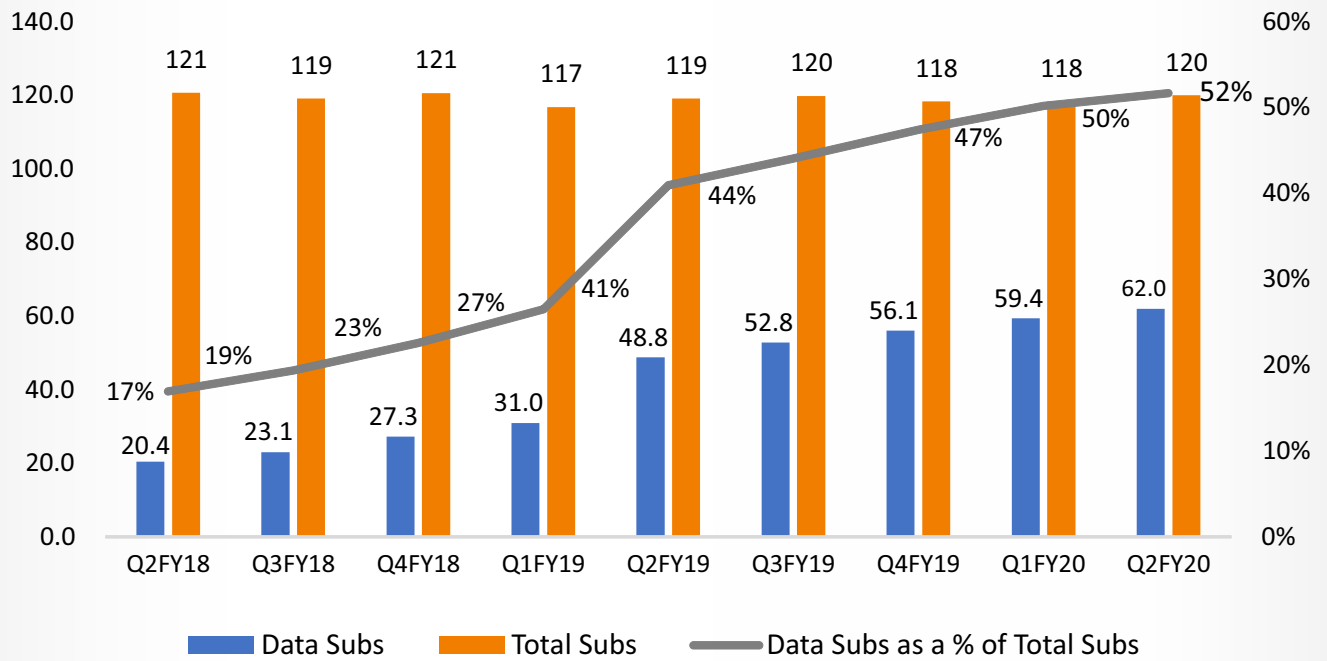
Source: TRAI Subscription Data

Note: Subscriber Figures are as of December 31st, as per TRAI Reports

Key Observation:

10% points increase in the share of Wireless Rural Subscribers from December 2011 to December 2019.

D. Data Subscribers as % of Total Subscribers

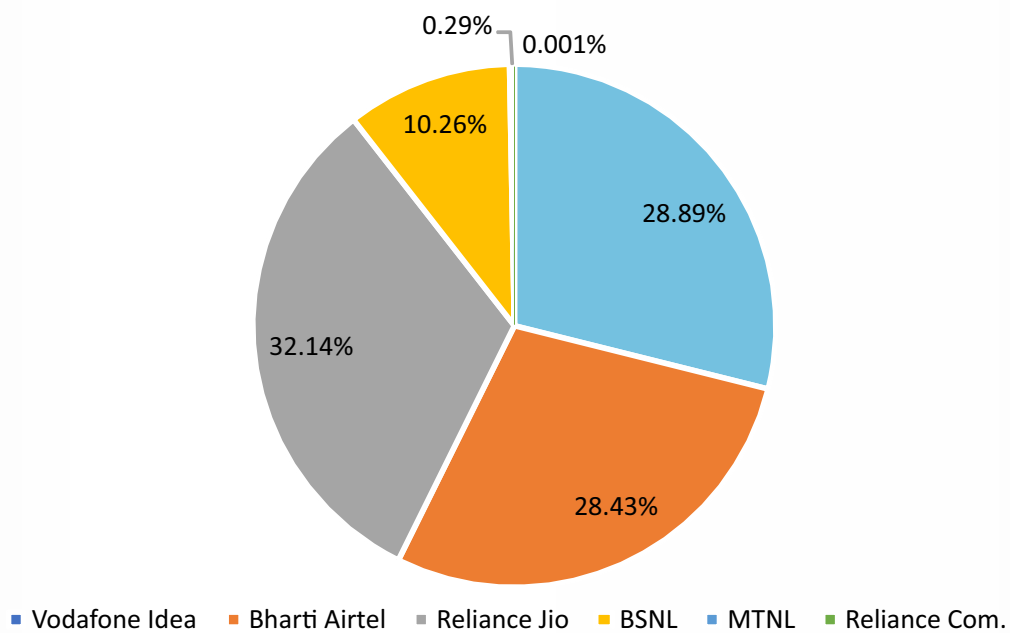


Source: Operators quarterly results, TRAI PIR
 Note: Data subscriber figure includes figures of Airtel, Rjio and VIL.

Key Observation:

The share of the data subscribers increased from 17% of the total subscribers in Q2FY18 to 52% in Q2FY20. There is around 200% increase in the Data Subscribers between Q2FY18 to Q2FY20.

E. Subscriber Market Share of Wireless Operators Dec 2019

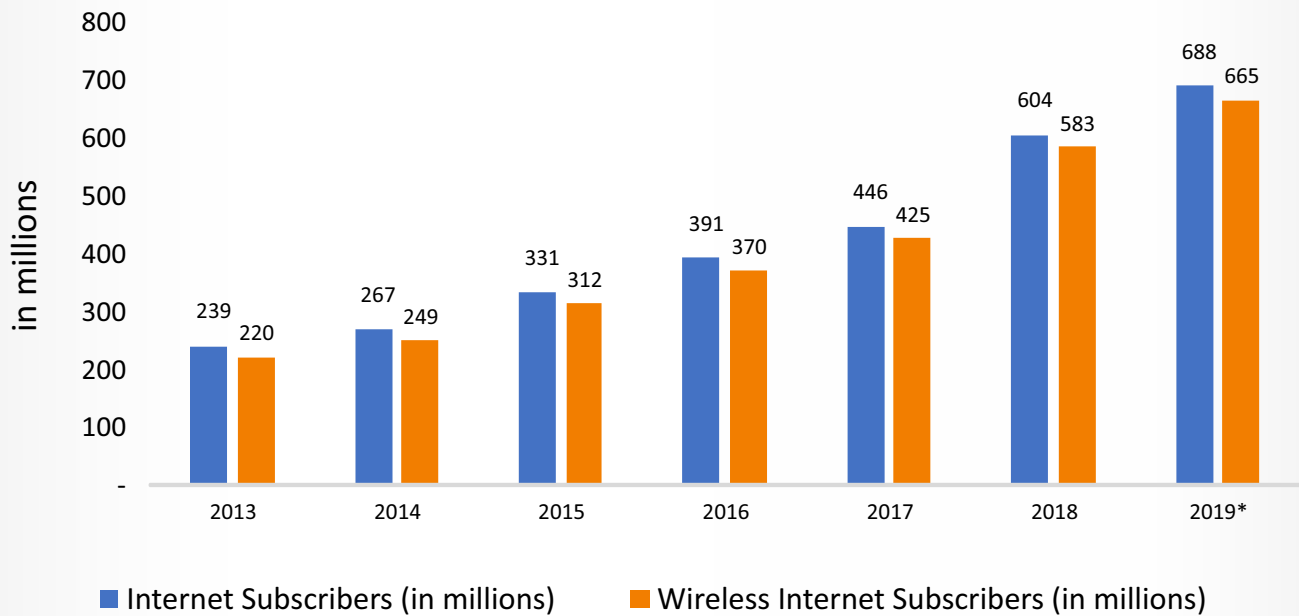


Source: TRAI Subscription data

Key Observation:

Private Operators hold approx. 90% of the market share in terms of Subscribers.

F. PAN India Total and Wireless Internet Subscribers



Source: TRAI

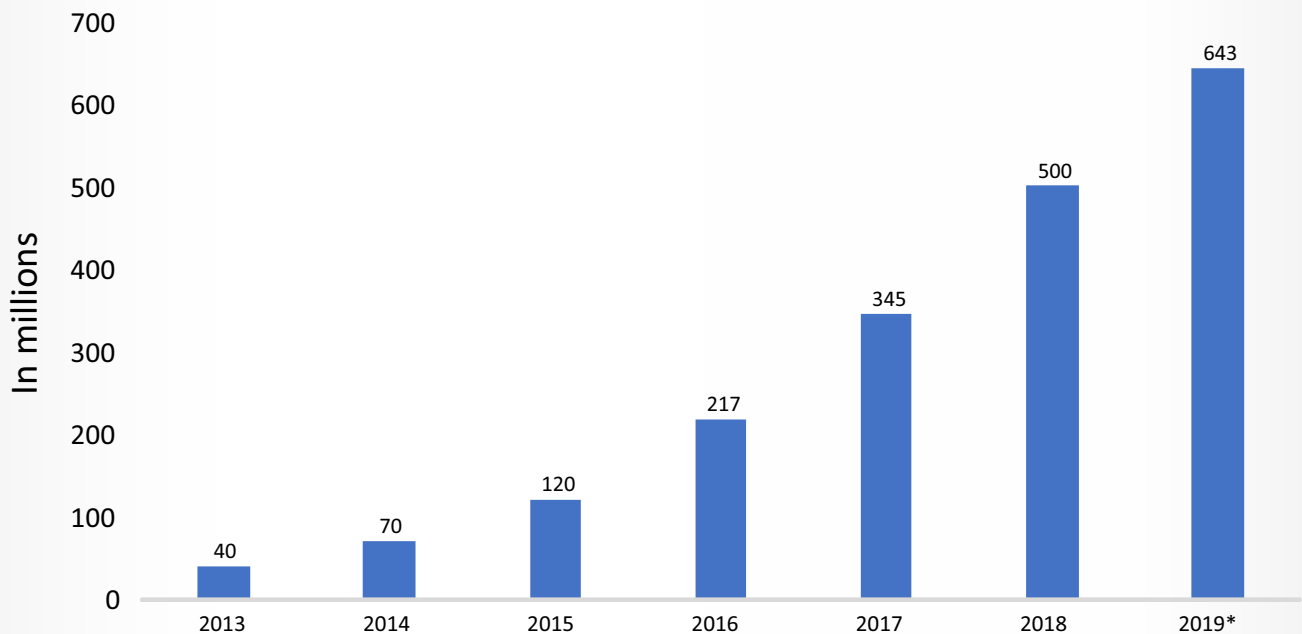
Note : 1) For 2013 to 2018 the data is as on 31st December as per TRAI report. TRAI is yet to publish data for Dec 2019.

2)* As of Sept 2019.

Key Observation:

More than 200% increase in the wireless internet subscribers between December 2013 to December 2019 with a CAGR of around 20% between this period.

G. Mobile Broadband Subscribers



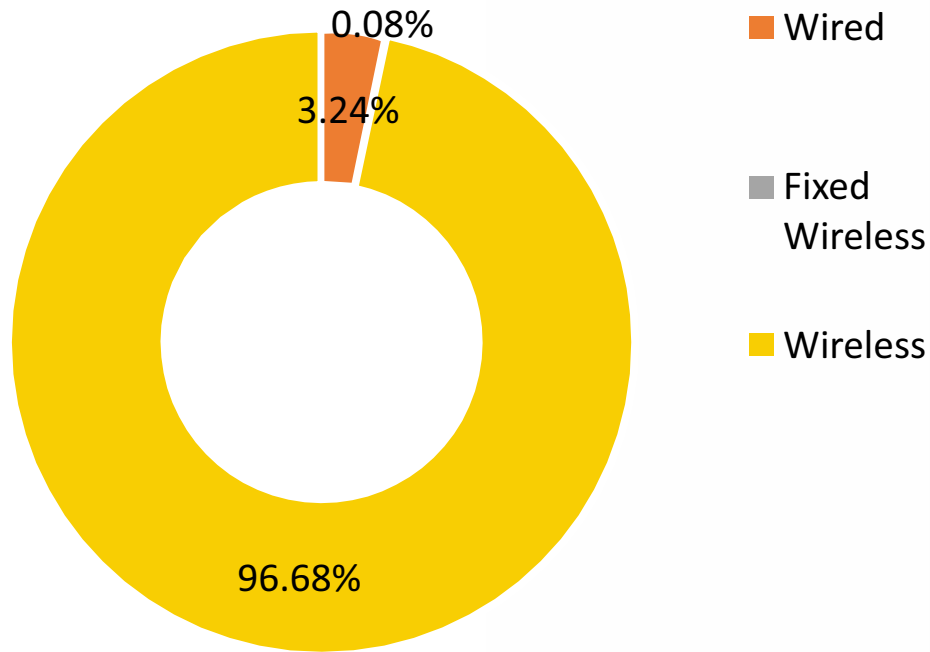
Source: TRAI Subscription data

Note: All the data is as of December 31st, as per TRAI Reports

Key Observation:

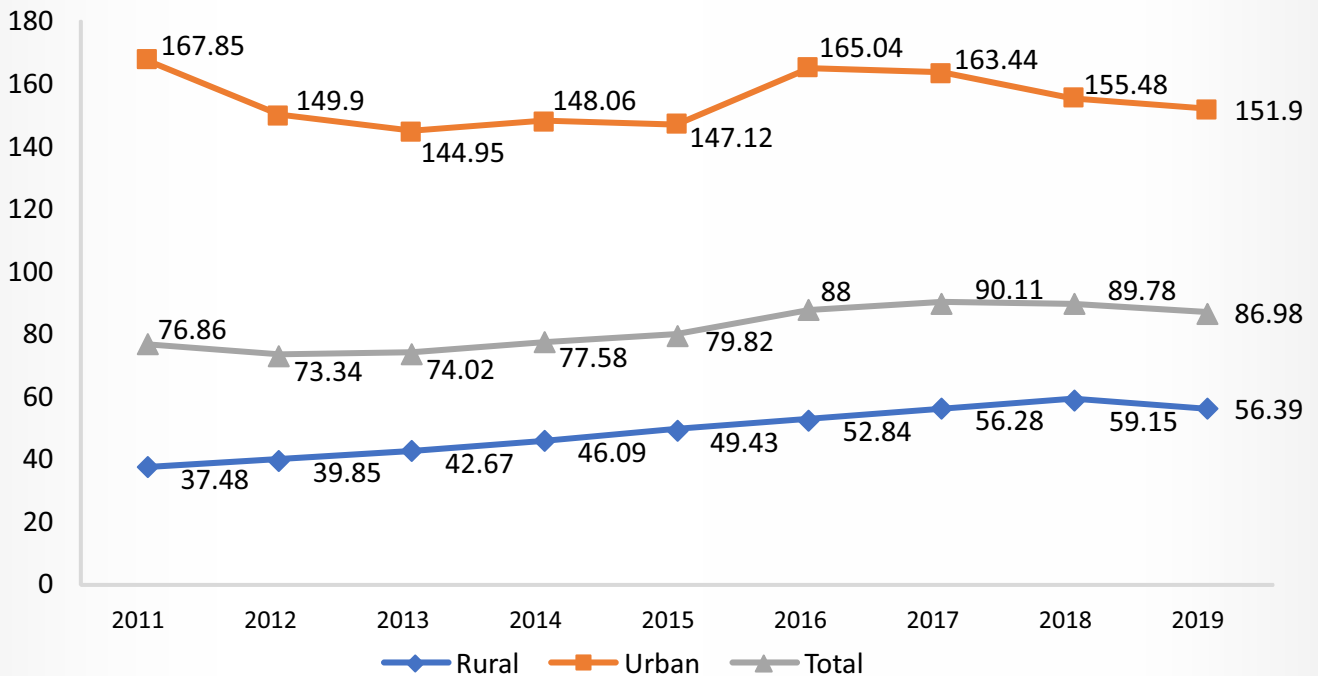
More than 1500% increase in mobile broadband subscribers between December 2013 to December 2019 with CAGR of 59% between this period.

H. Composition of Internet Subscribers - Sep 2019



Source: TRAI PIR

IV. Wireless Tele-Density



Source: TRAI Subscription data

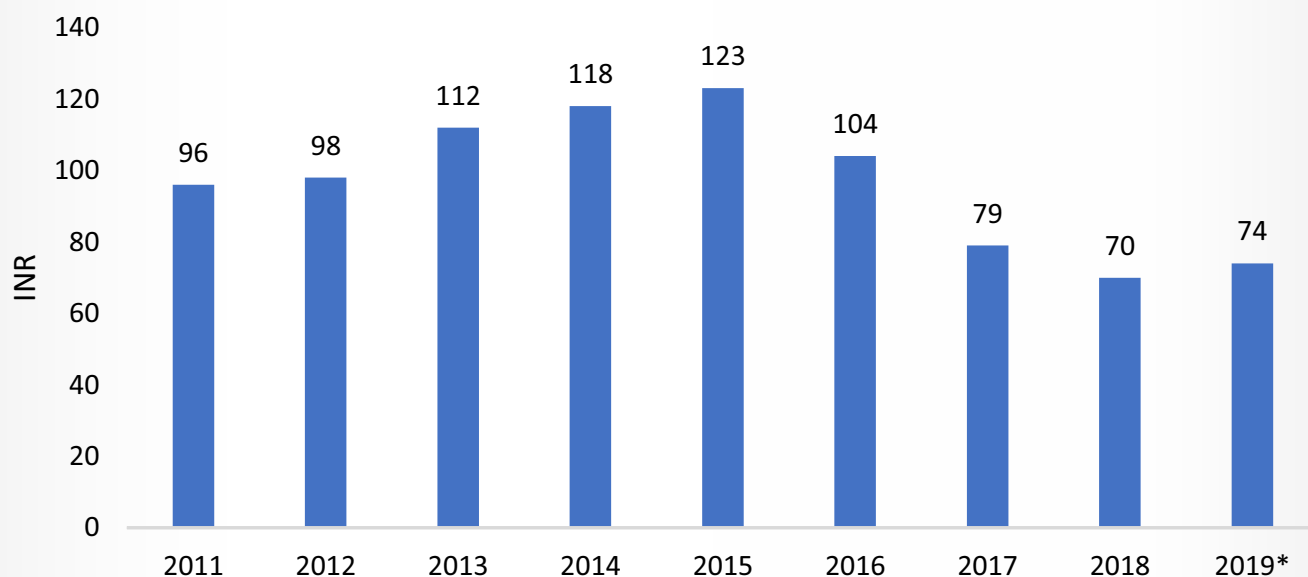
Note: All the data is as of December 31st, as per TRAI Reports

Key Observation:

The Rural Tele-Density increased by almost by 20 basis point from December 2011 to December 2019.

V. Revenue and Usage Parameters

A. Monthly Average Revenue Per User (ARPU) – Wireless Services



Source: TRAI

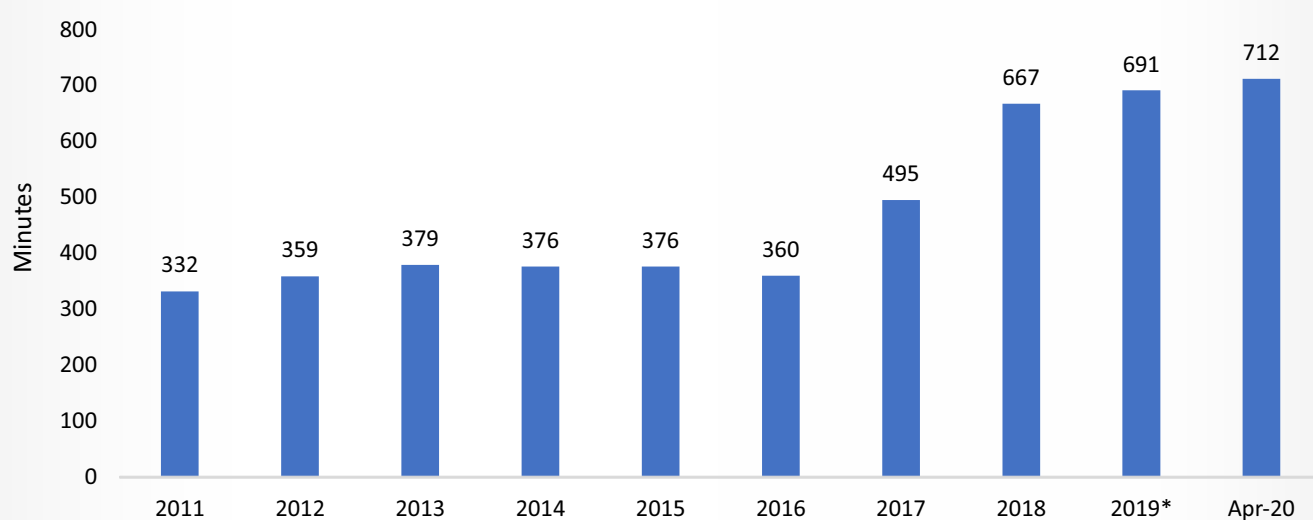
Note : 1) For 2013 to 2018 the data is as on 31st December as per TRAI report. TRAI is yet to publish data for Dec 2019.

2)* As of Sept 2019. 3) TRAI Excludes the IUC and Roaming Settlement Charges while calculating the ARPU

Key Observation:

The monthly ARPU has declined from INR 123 in 2015 to INR 74 in September 2019. This is decline of almost 40%. However, there has been slight increase in the ARPU in 2019 compared to 2018, which was at INR 70.

B. Minutes of Usage (MOU) per subscriber per month - Wireless Service



Source: TRAI PIR, COAI Estimates

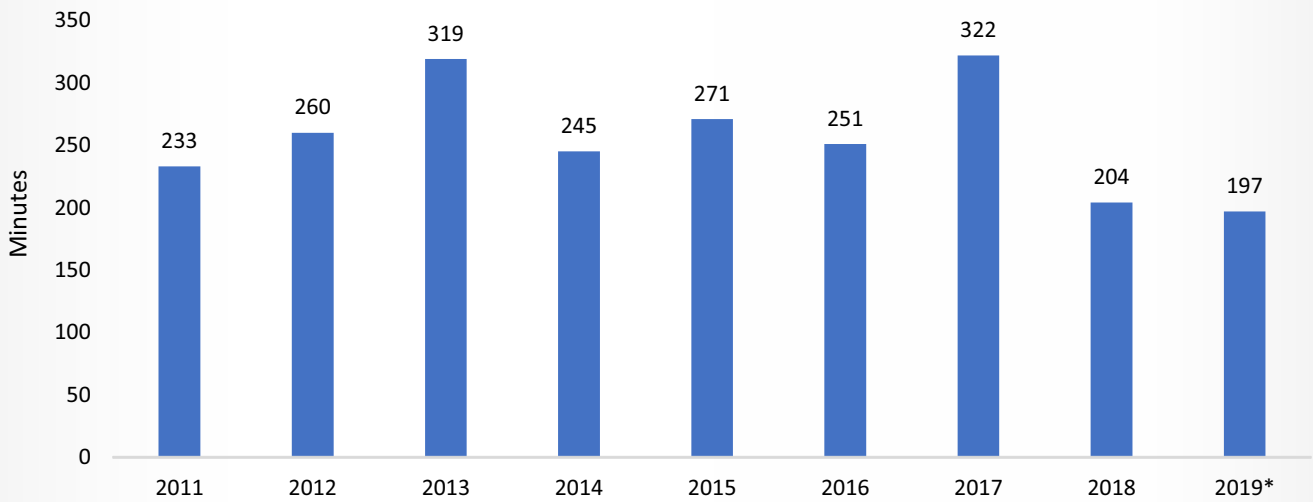
Note: 1) For 2011 to 2018 the data is as on 31st December as per TRAI report. TRAI is yet to publish data for Dec 2019.

2)* As of Sept 2019. 3) April 2020 data is estimated

Key Observation:

Significant increase of almost 98% in the MOU per Subs per month from 2016 to April 2020.

C. Total Outgoing MoU for Internet Telephony



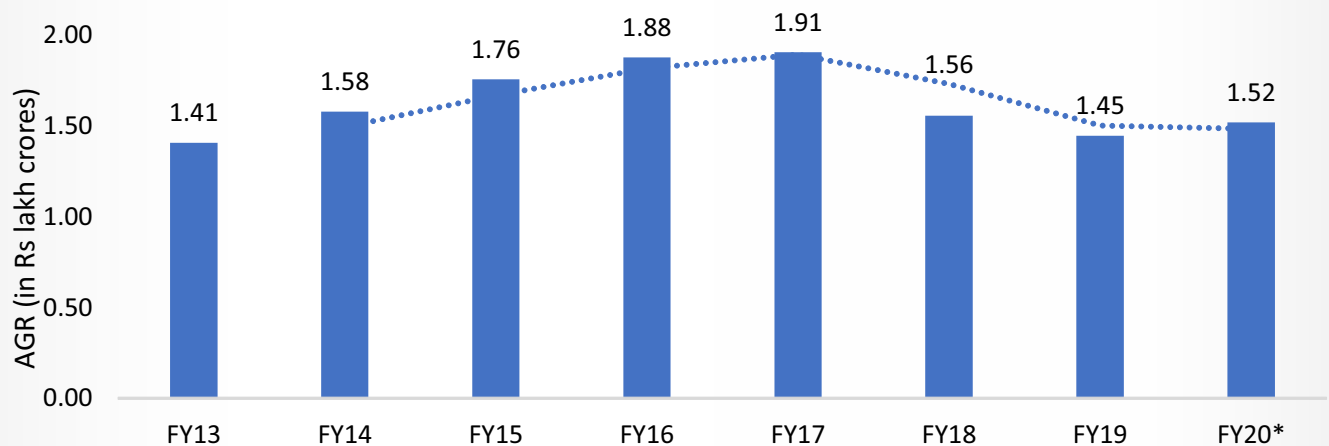
Source: TRAI PIR, COAI Estimates

Note: 1) For 2011 to 2018 the data is as on 31st December as per TRAI report. TRAI is yet to publish data for Dec 2019.

2)* As of Sept 2019.

VI. Telecom Financial Data

A. Industry Adjusted Gross Revenue



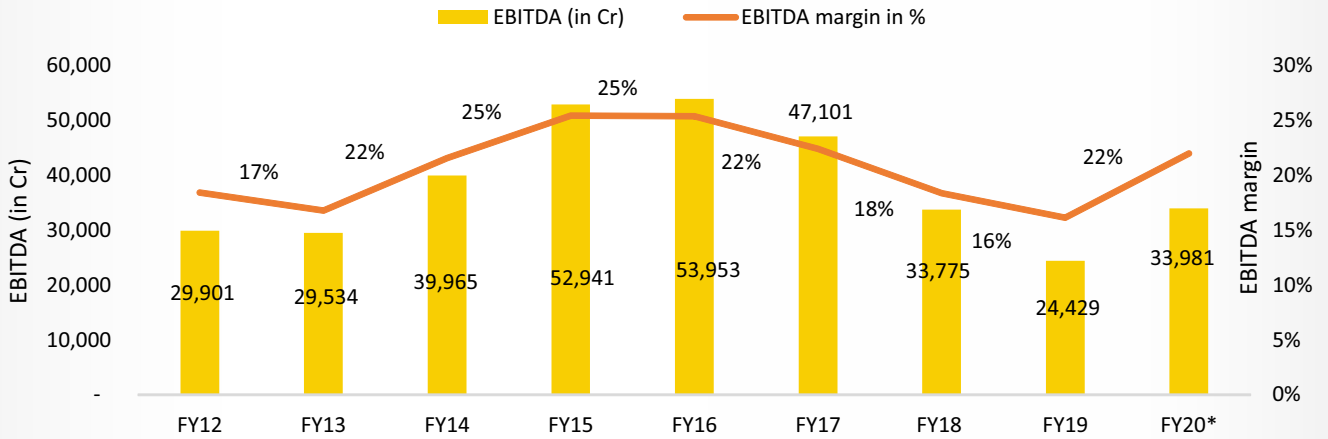
Source: TRAI PIR and COAI Analysis

Note: * COAI estimates

Key Observation:

Industry AGR decreased by almost 17% between FY 17 to FY 20. However, it is estimated that there will be slight growth in the AGR in FY 20 as compared to FY 19.

B. Industry EBITDA & EBITDA Margin

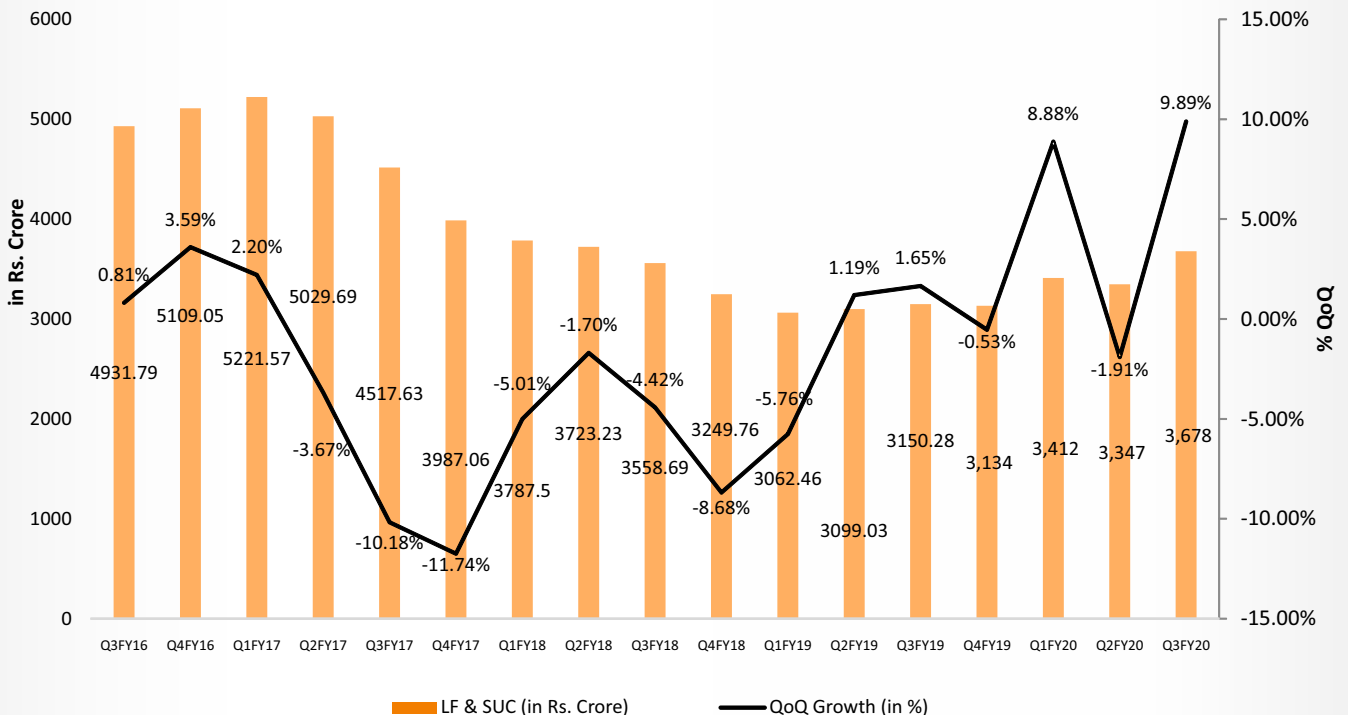


Source: TSPs Quarterly results, COAI Estimates

Key Observation:

Industry EBITDA decreased by almost 37% between FY16 and FY 20. However, it is estimated that there will be growth in the EBITDA in FY 20 as compared to FY19. EBITDA margin also decreased from 25% to 22% between FY 16 to FY 20.

C. Total Regulatory Levy - License Fee + SUC



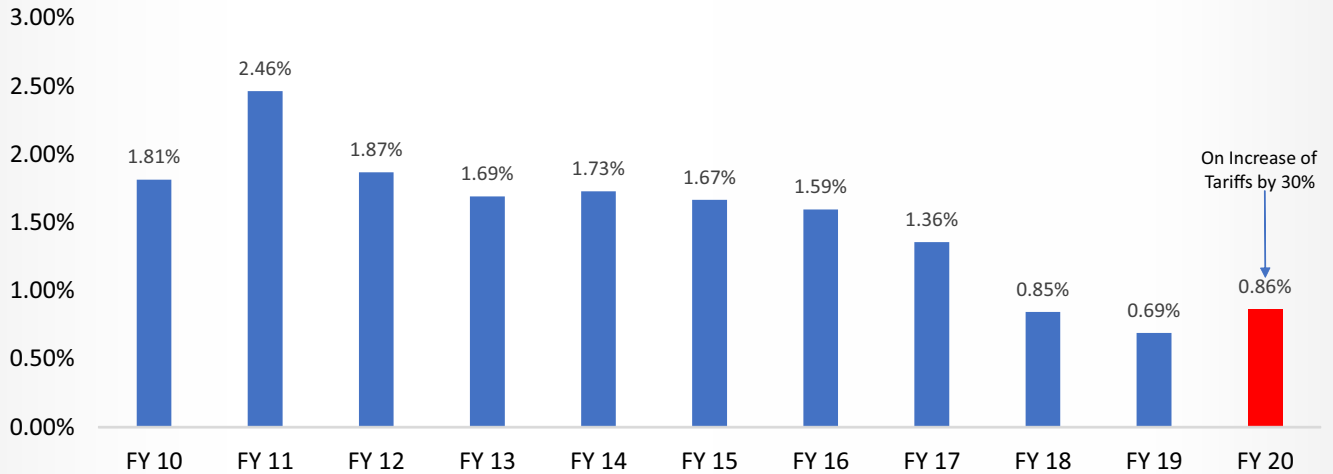
Source: TRAI Financial Report

Note: The figures are for the Access Service Only

Key Observation:

Fall in revenue resulted in a decline in contribution to the exchequer since Q3FY 16. However, there has been slight increase in the L.F + SUC contribution in Q3 FY 20 as compared to Q2 FY 20.

D. ARPU as % of Per Capita Income



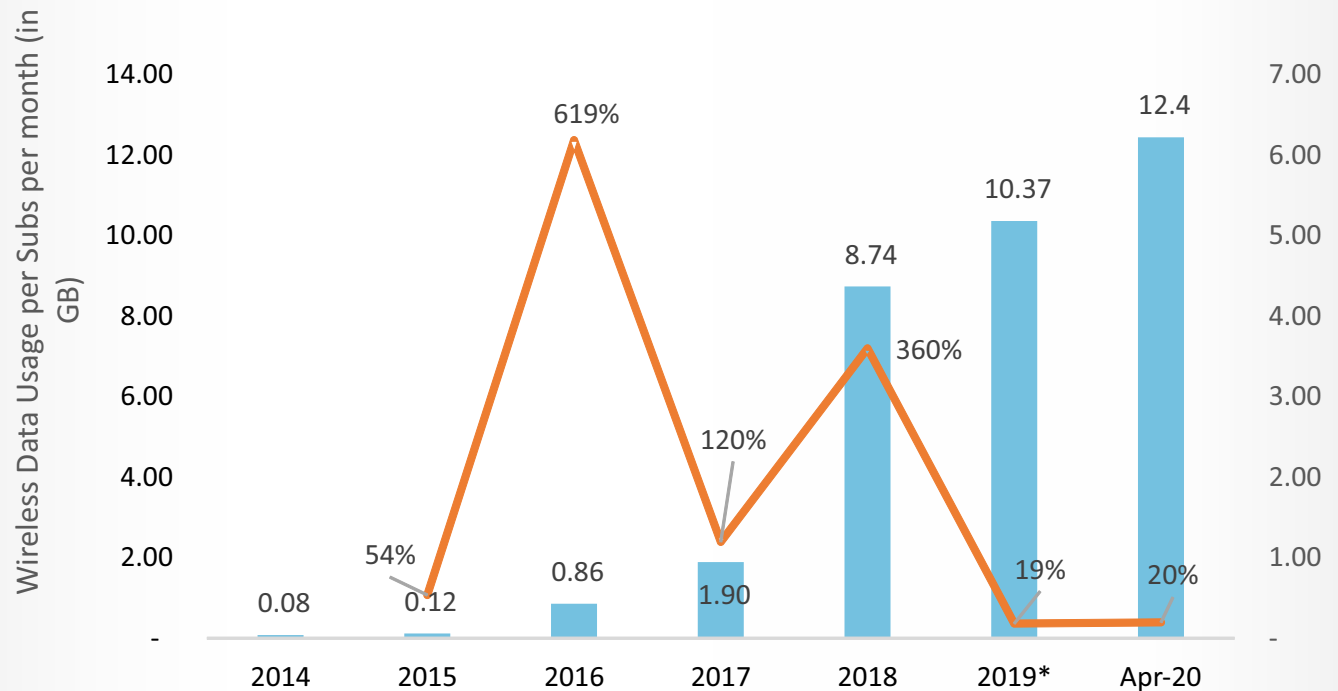
Source: COAI Analysis

Key Observation:

ARPU as % of Per Capita Income was 0.69% in FY19. Even if we consider the increase in the Tariffs by all the TSPs in FY 20 by 30% the ARPU as % of per Capita income will just be 0.86%. Thus, Telecom services still will be very affordable for the user in India.

VII. Data Usage of Mobile Subscribers

A. Wireless Data Usage per Subscriber per Month



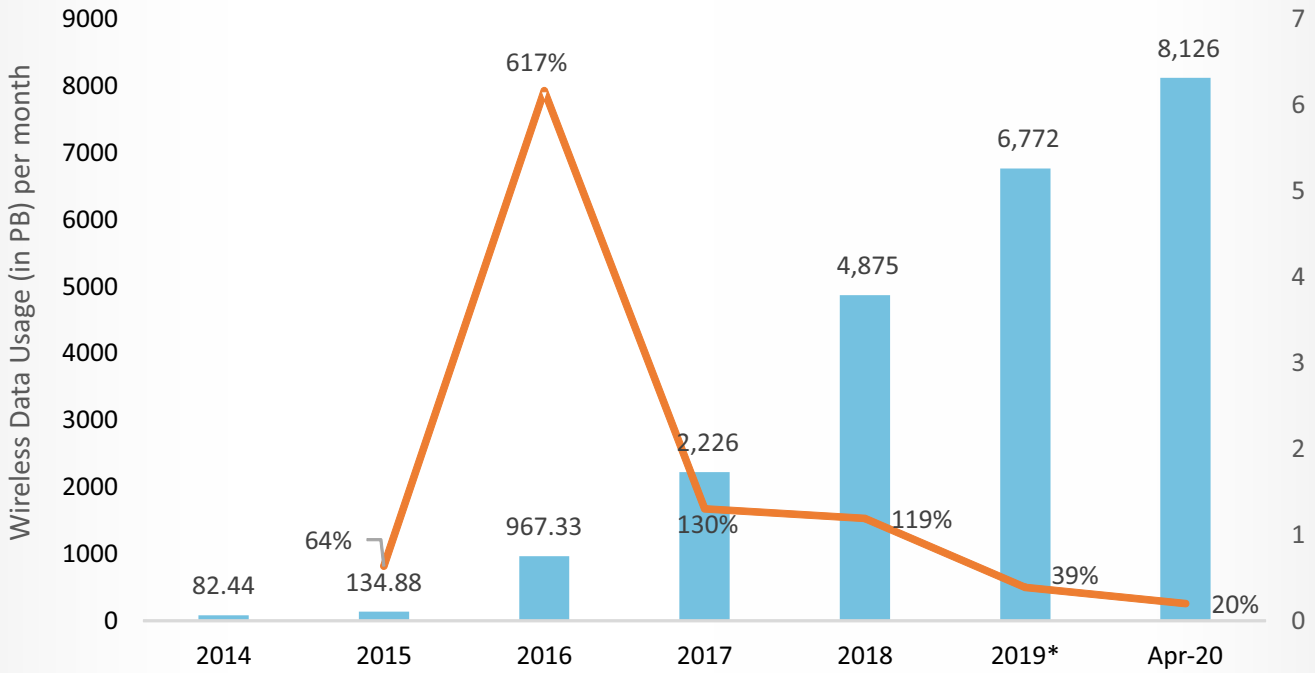
Note: 1) For 2014 to 2018 the data is as on 31st December as per TRAI report. TRAI is yet to publish data for Dec 2019.

2)* As of Sept 2019. 3) April 2020 data is estimated

Key Observation:

Wireless Data Usage per subscriber per month has increased by almost 13 times since 2016.

B. Wireless Data Usage per Month



Source: TRAI PIR, COAI Estimates

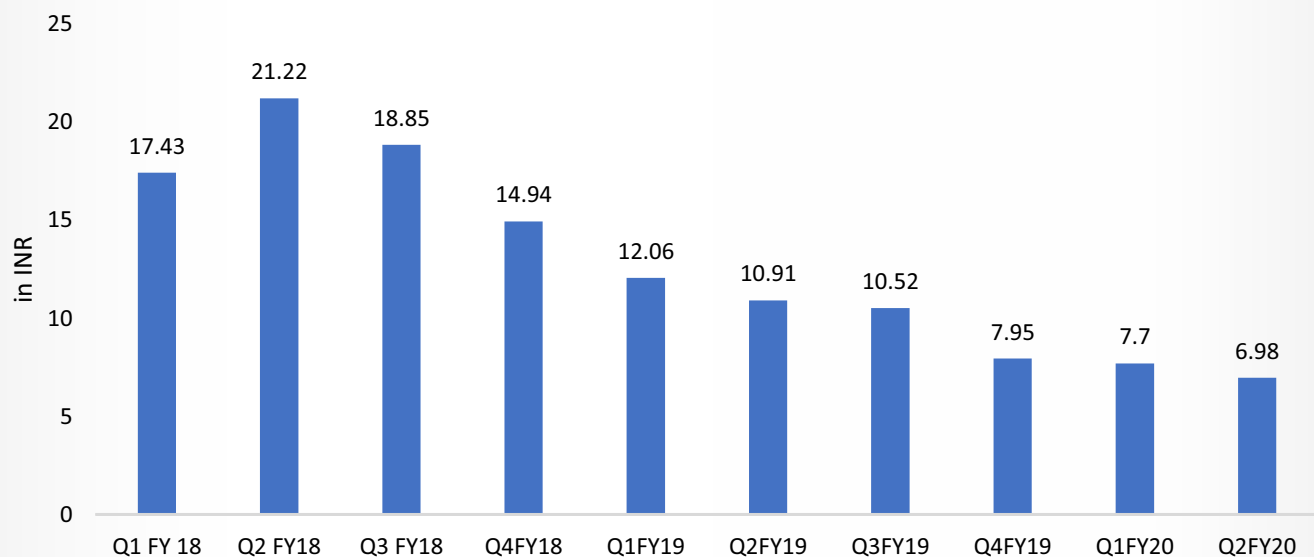
Note: 1) For 2014 to 2018 the data is as on 31st December as per TRAI report.

2)* As of Sept 2019, 3) April 2020 data is estimated. 4) 1PB is equal to 1 Million GB

Key Observation:

Total Wireless Data Usage per month has increased by almost 7 times since 2016.

C. Average Outgo per GB per Quarter

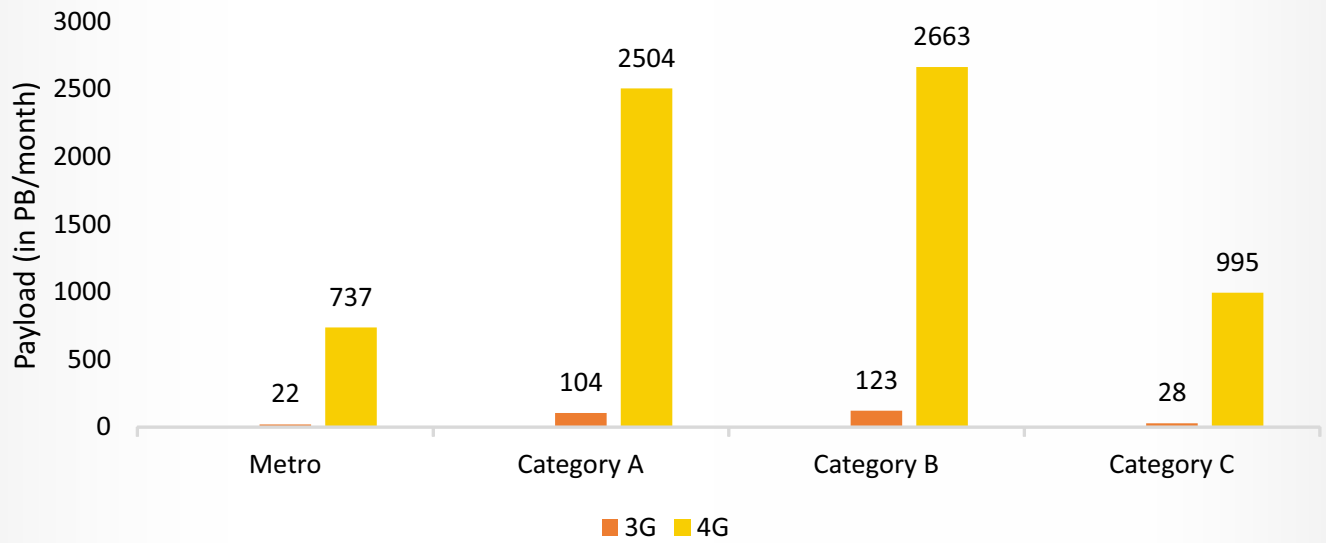


Source: TRAI PIR

Key Observation:

There has been 67% decrease in the average Outgo per GB between Q2 FY 18 and Q2 FY 20. This shows that the per GB cost for the user has decreased significantly since Q2 FY 18.

D. Data Traffic in Circles



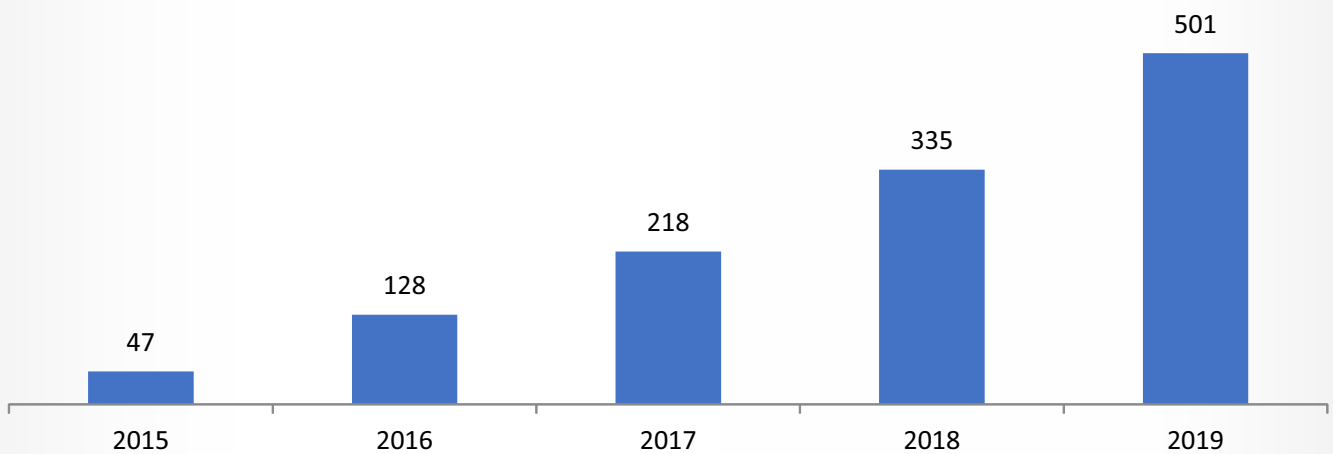
Source: Nokia M BiT 2020

Key Observation:

4G payload is much higher than the 3G Payload in all the Circles.

VIII. Smartphone Devices in India

A. 4G Capable Unique Devices

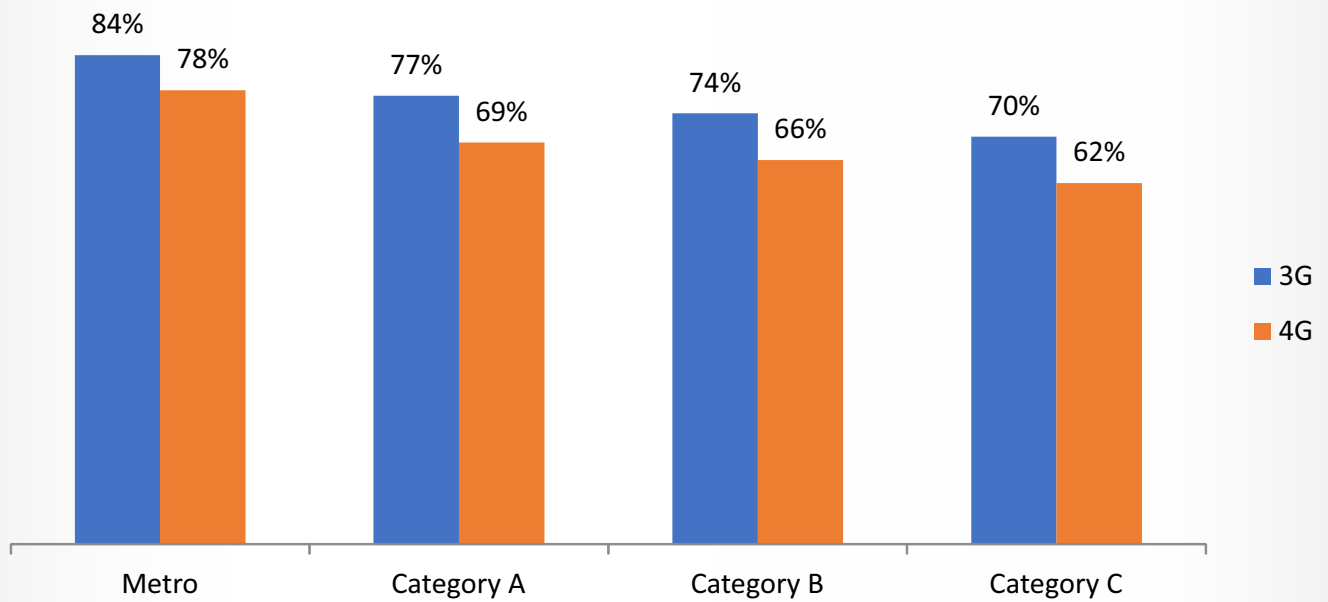


Source: Nokia M BiT Reports

Key Observation:

Approx. 50% increase in 4G capable unique devices from 2018 to 2019

B. 3G/4G Capable Device Penetration in India



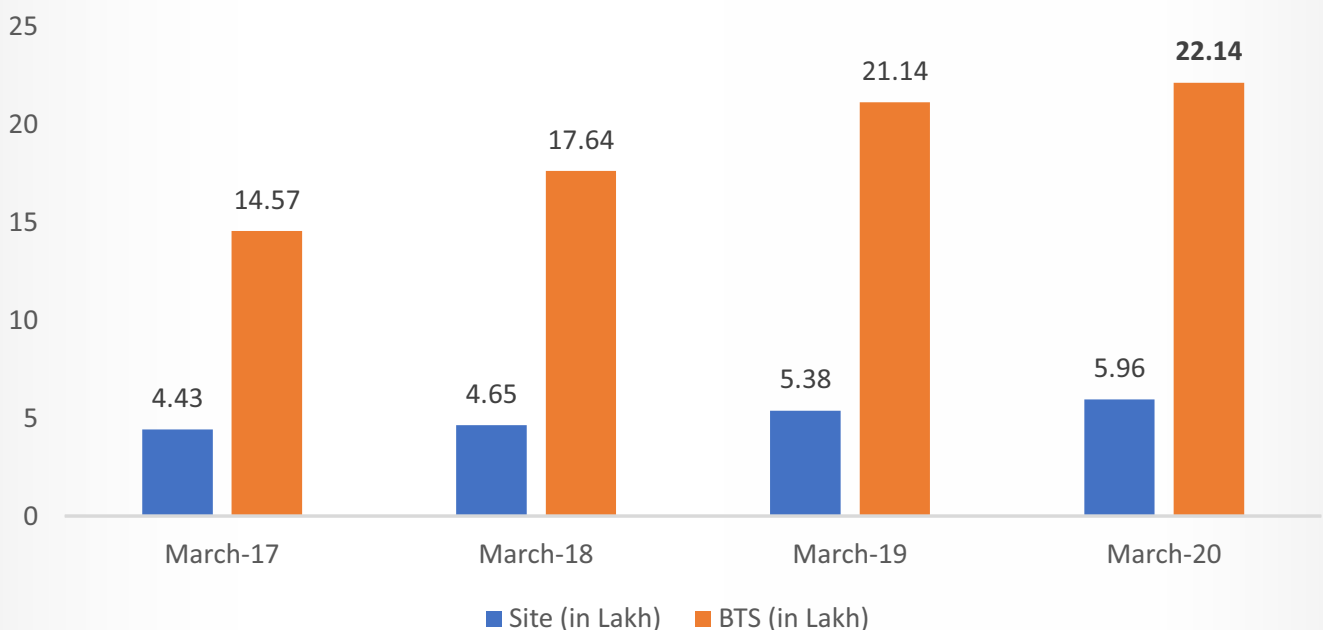
Source: Nokia M BiT 2020

Key Observation:

78% penetration in Metros of 4G capable devices. Also, 3G enabled devices are still more than the 4G enabled devices in all the Circles.

IX. Telecom Infrastructure

A. Number of Base Transceiver Stations (BTS) and Sites

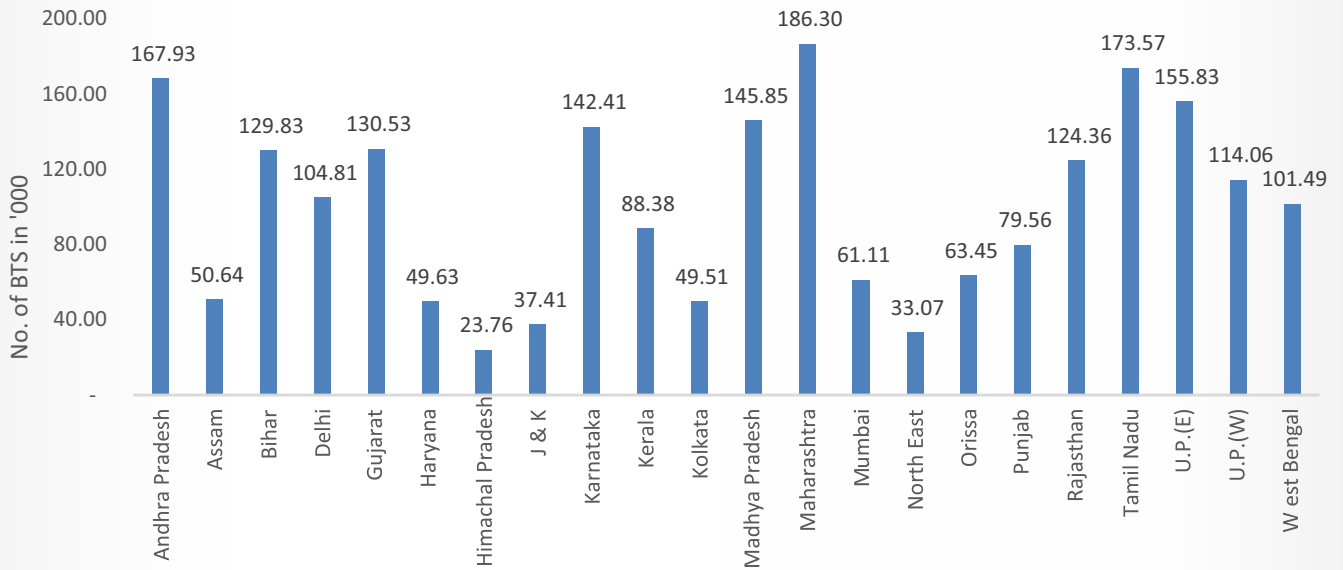


Source: Tarang Sanchar

Key Observation:

52% increase in the number of BTSs from March 2017 to March 2020

B. Number of Base Transceiver Stations (BTS) in each Circle

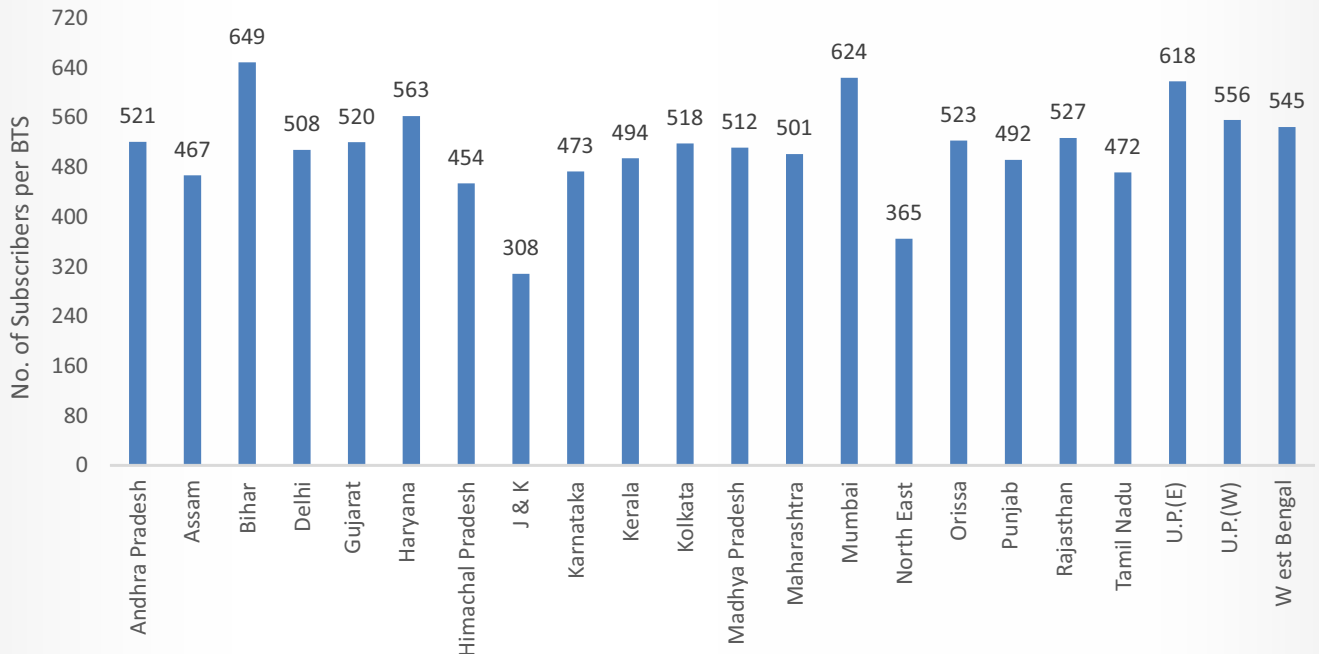


Source: Tarang Sanchar

Key Observation:

Maharashtra has the highest number of BTSs followed by Tamil Nadu and Andhra Pradesh.

C. Number of Wireless Subscribers per BTS in each Circle



Source: Tarang Sanchar, TRAI, COAI Estimates

Key Observation:

In Bihar there are around 649 wireless Subscribers per BTS, which is the highest in the country, while in J&K it is estimated that one BTS caters to around 308 wireless subscribers.

Telecom circles with the Highest Number of Base Transceiver Stations



Maharashtra
>186296



Tamil Nadu
>173569



Andhra Pradesh
>167926

Source: Tarang Sanchar

International Trends

(Asia Pacific Region)



Subscriber Base:

India has the second largest subscriber base in the world, second only to China. India has approx. 15% of total subscribers of the world.



Internet Usage:

Indians spend 3.23 hours on internet per day using mobile devices (handset) in comparison to the world average.



Global Mobile Traffic:

India contributes highest in the Global Mobile Data Traffic per smartphone at 14.5 GB per smartphone per month.



Price per GB Data Traffic:

India has the most affordable data service at 0.26 USD per GB Data.



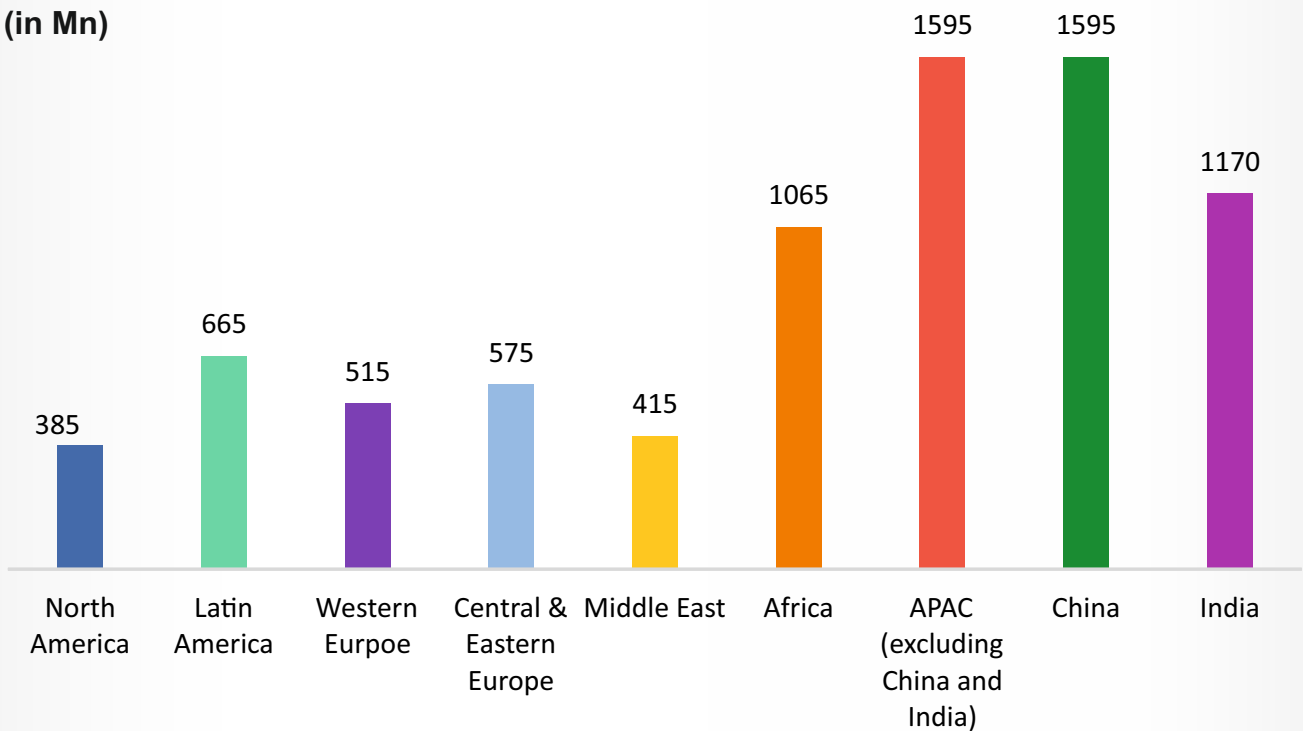
Share of Prepaid Connections:

India's prepaid share is one of the highest in the world at 96% with the world average being 73%.



A. Mobile Subscription

(in Mn)

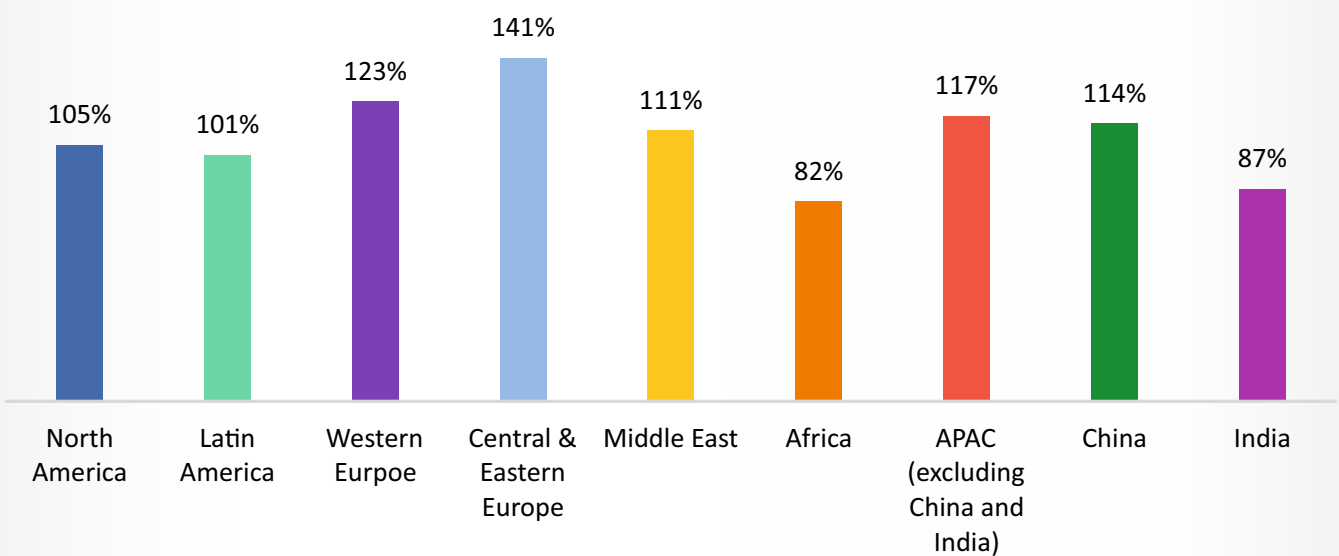


Source: Ericsson Mobility Report, November 2019

Key Observation:

India has around 15% of the total world mobile subscribers.

B. Subscription Penetration

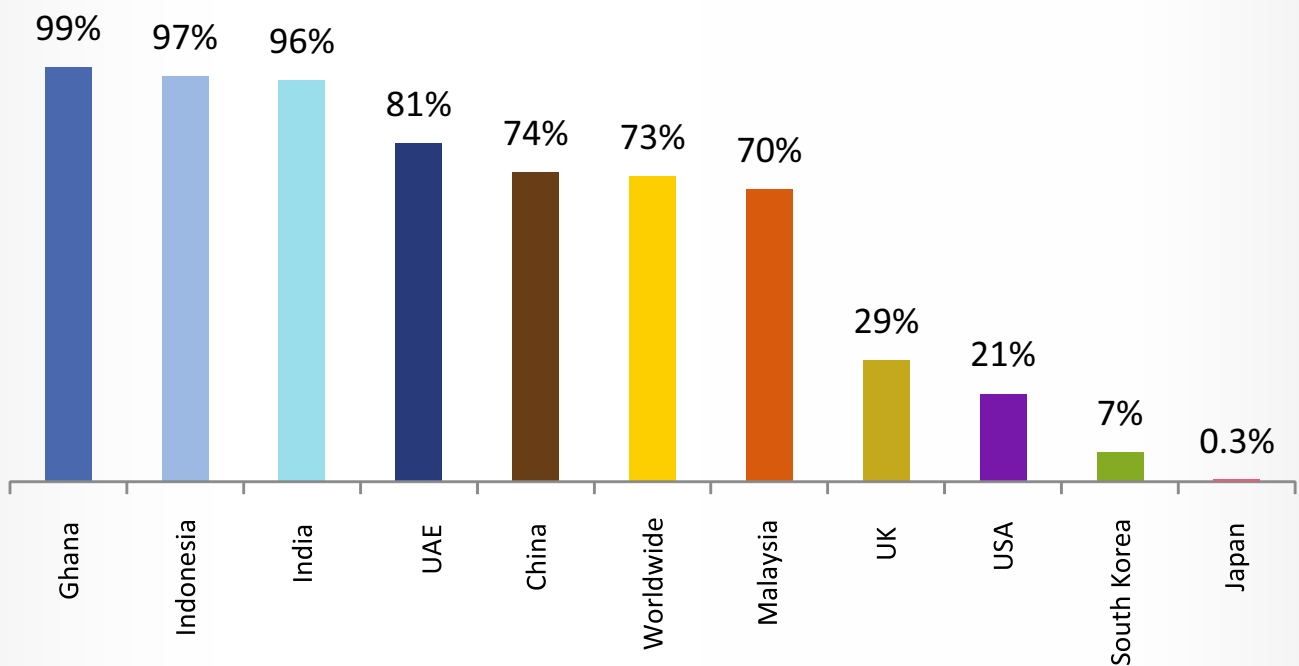


Source: Ericsson Mobility Report, November 2019,
TRAI Subscription Data, November 2019

Key Observation:

There is a headroom for growth as India's penetration is 87%.

C. Share of Prepaid Connections

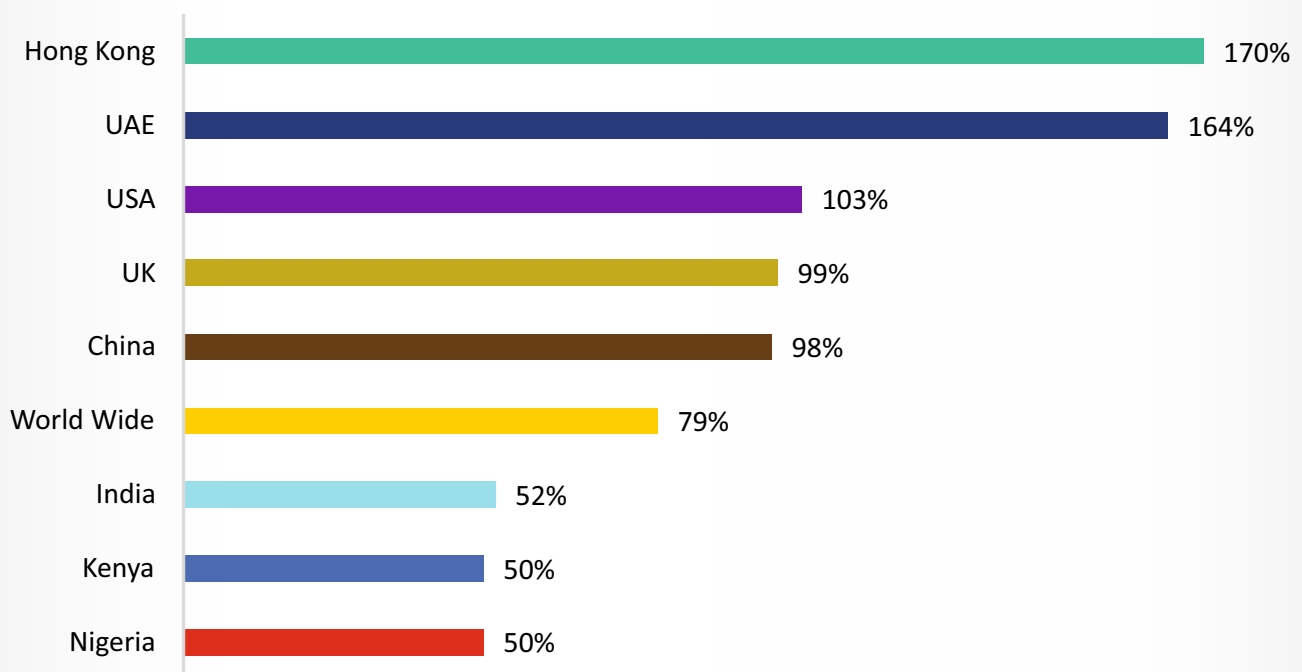


Source: Hootsuite Report, January 2020,
TRAI PMR, September 2019

Key Observation:

India's prepaid share is one of the highest in the world at 96% with the world average being 73%.

D. Mobile Broadband Connectivity

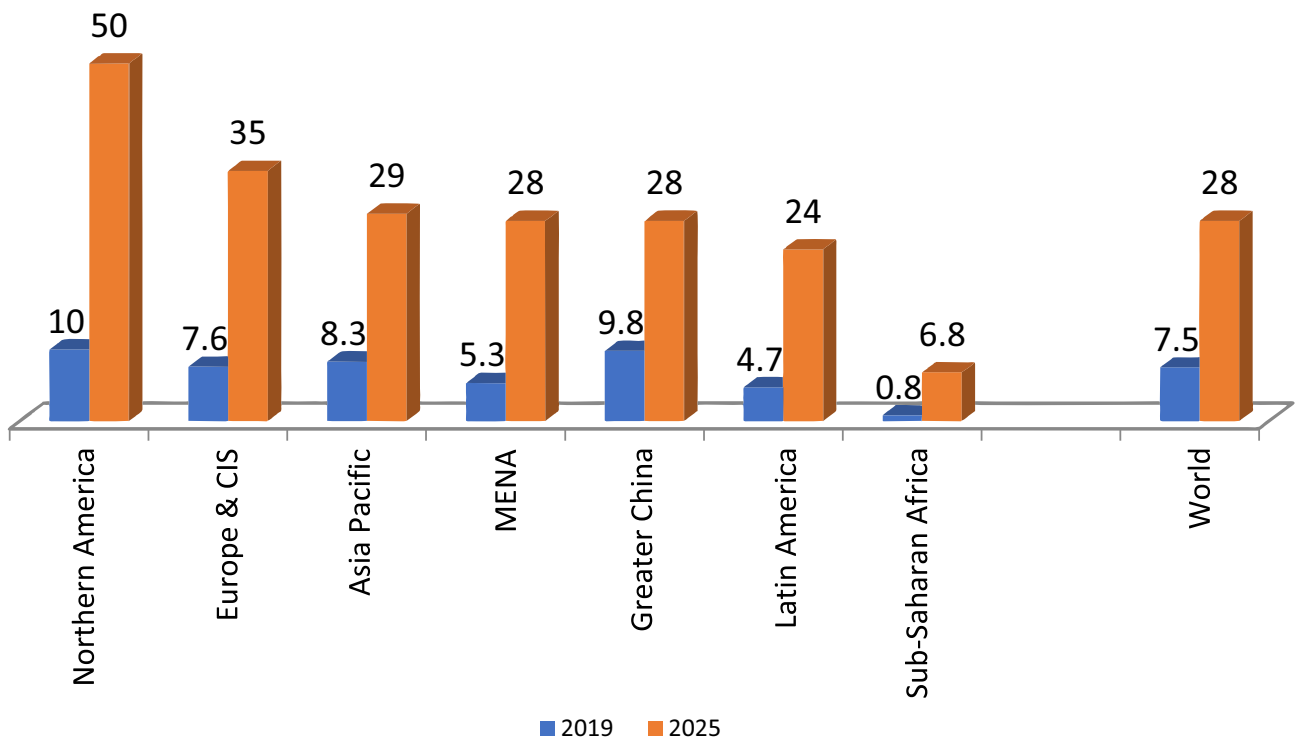


Source: Hootsuite Report, January 2020

Key Observation:

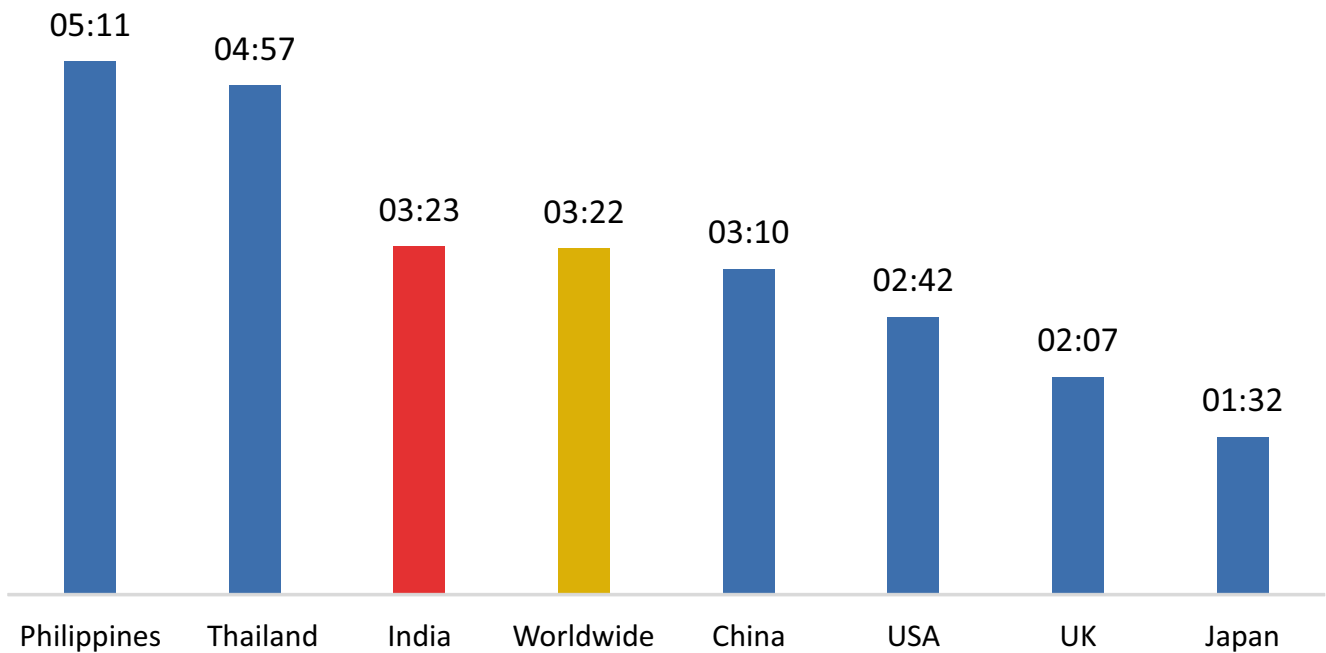
Mobile Broadband Penetration of India is 52% and there is significant headroom for growth.

E. Global Mobile Data Usage (in GB per Subscriber per Month)



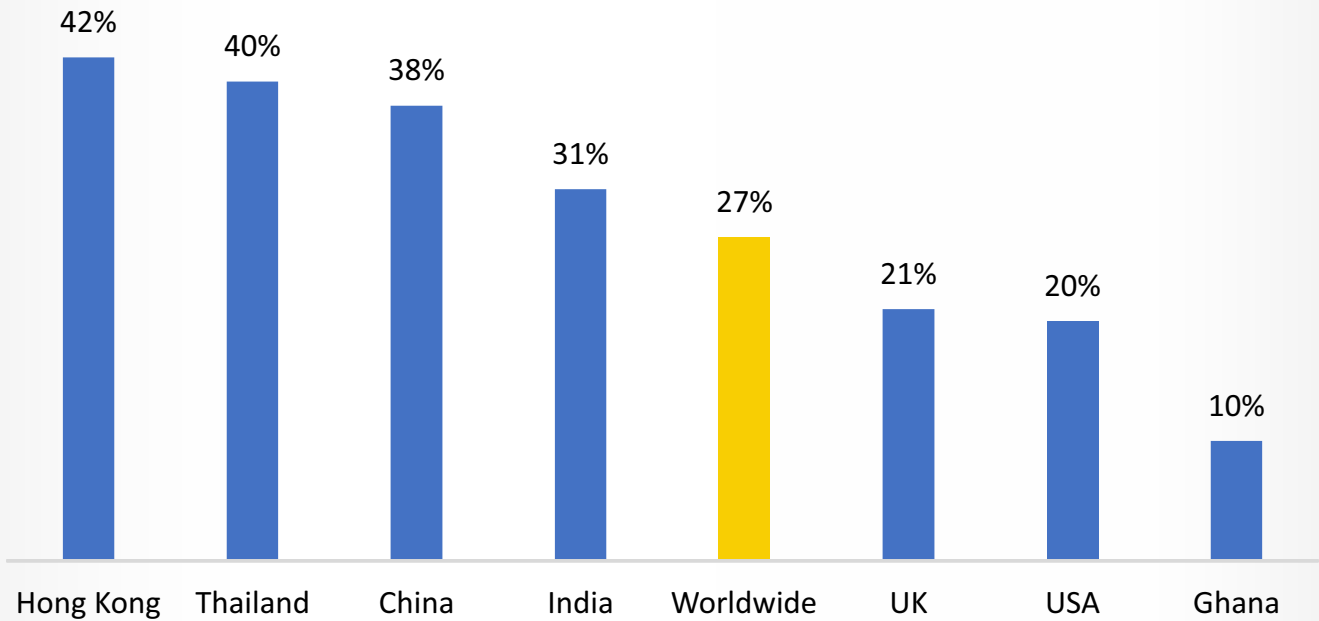
Source: GSMA Mobile Economy 2020

F. Time Spent in hours per day on internet using Mobile Internet



Source: HootSuite Report January 2020

G. Mobile Payment Services Penetration

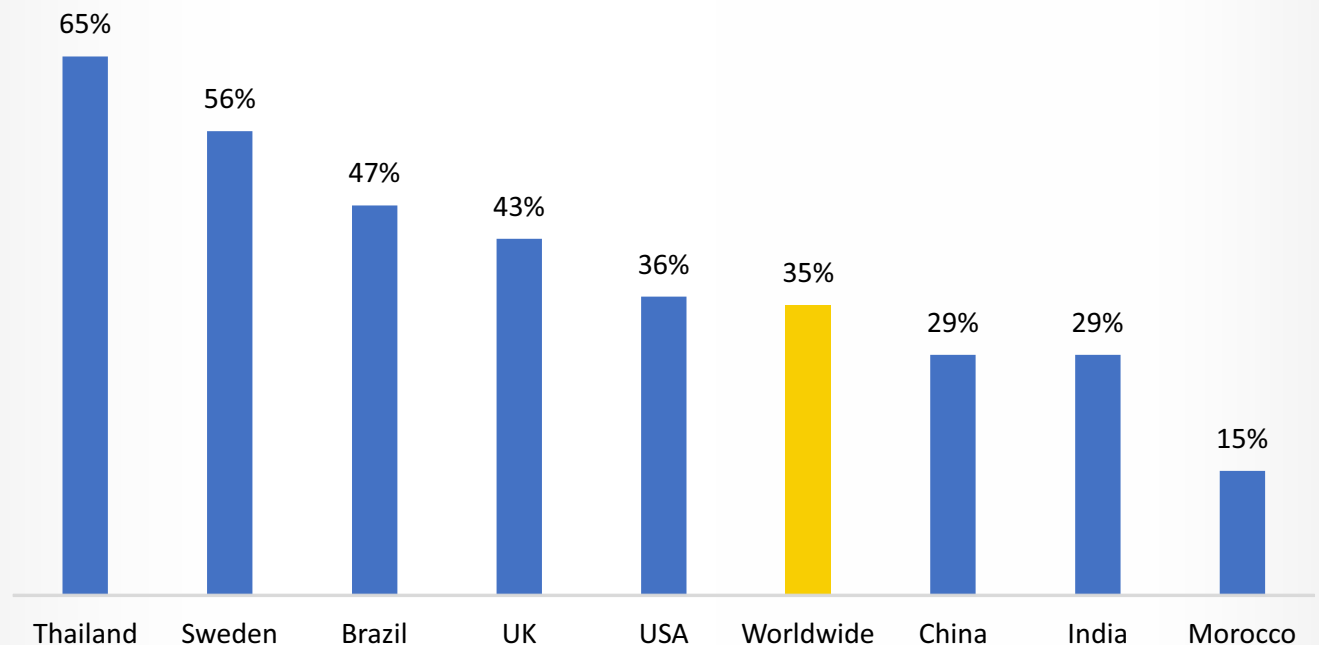


Source: HootSuite Report 2020. The graph shows % of internet users that accesses banking services via a mobile device

Key Observation:

There is a vital scope of further rise in mobile payment services. The Mobile payment users as percentage of total internet user is 31% in India.

H. Mobile Banking and Financial Services Penetration

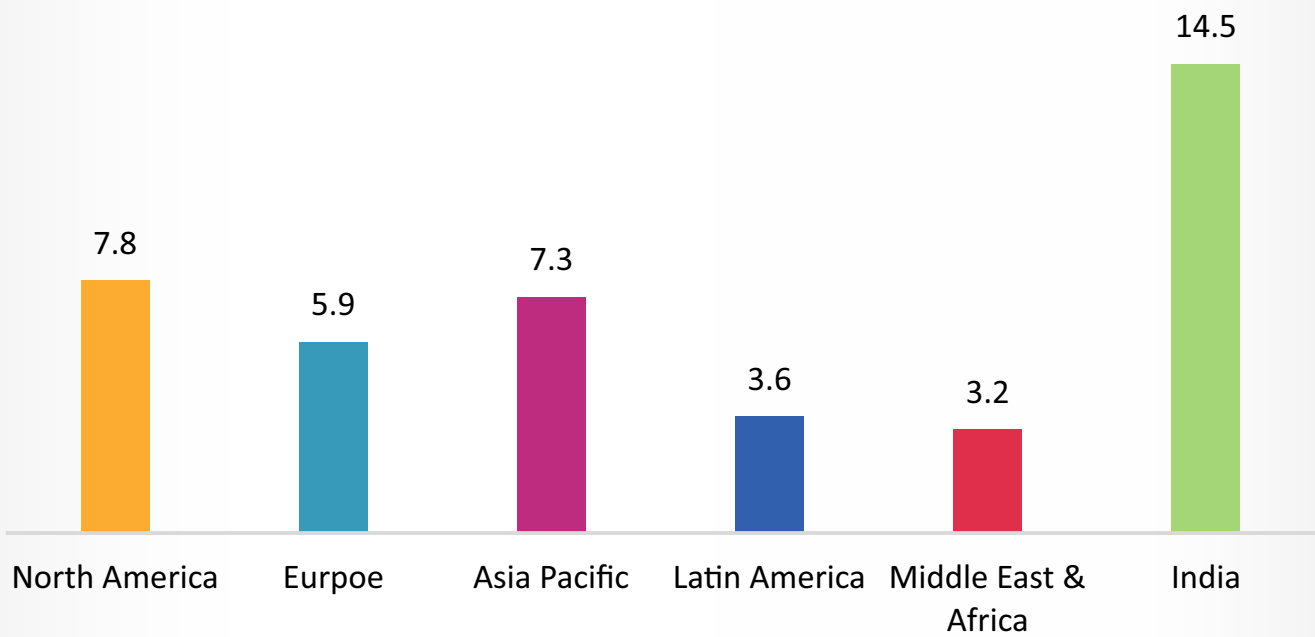


Source: HootSuite Report 2020. The graph shows % of Internet users who use their phones to pay for goods or services each month (survey based)

Key Observation:

29% Indian Internet Users have adopted mobile banking and financial services, much lower than countries like Brazil, Thailand and World average.

I. Global Mobile Data Traffic per Smart Phone (in GB per Month)

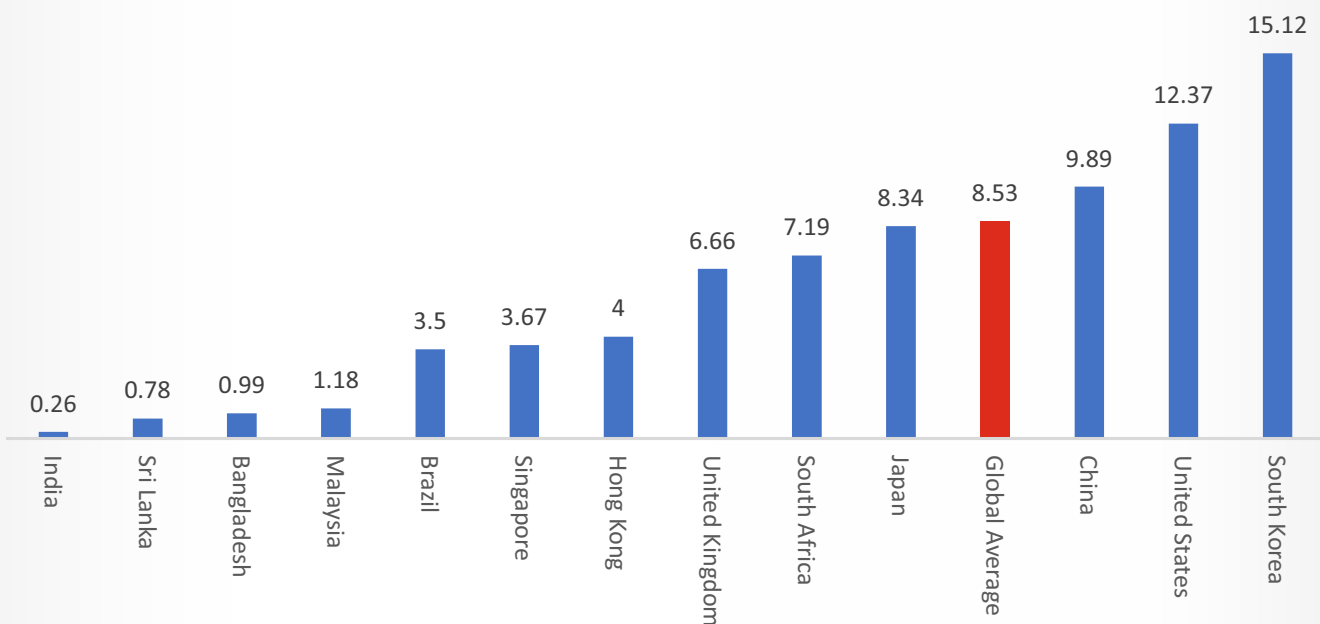


Source: Ericsson Mobility Report, November 2019, Hootsuite Report, January 2020

Key Observation:

India contributes highest in Global mobile data traffic per smart phone; 14.5 GB per smart phone per month.

J. Price per GB Data Traffic (in USD)

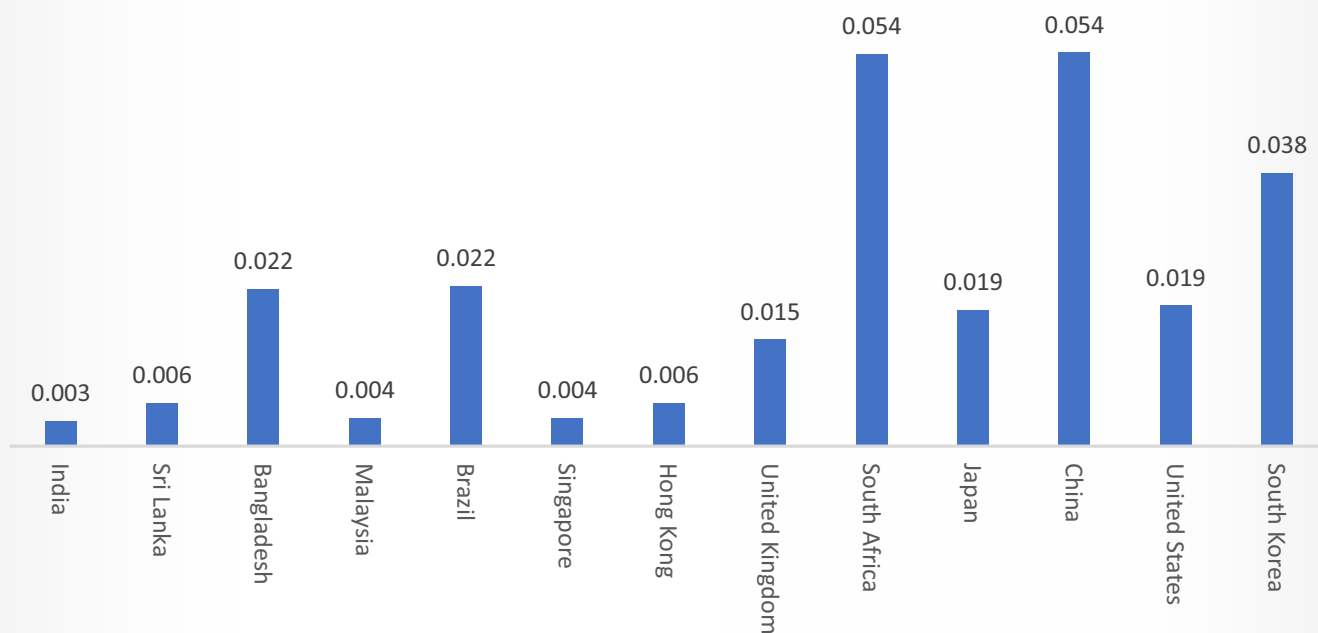


Source: Cable.co.uk, site accessed on 24.02.2020

Key Observation:

India has the lowest price per GB in the world.

K. Price per GB Data as % GNI per Capita PPP (USD)



Source: Cable.co.uk, World Bank, COAI estimates

Key Observation:

India has one of the lowest data price per GB as % GNI per Capita PPP. In the figure above the Prices per GB are expressed as a percentage of GNI per capita to show data price relative to the size of the economy of each country, thus pointing to the affordability of data tariffs in each country. India is one of the most affordable country in the world in terms of data tariffs.

Significant Achievements for the Year 2019-2020

1. Moratorium granted by DoT for the Payment of the Spectrum dues:

a. COAI in its various representations to DoT requested for a moratorium for the payment of the spectrum acquired through various auctions. In this regard, DoT after the cabinet decision agreed to provide the two-Year Moratorium i.e. for FY 21 & FY 22 to the Industry for the deferred payment for the spectrum acquired through auction.

b. It is estimated that this decision of DoT provided the cash flow benefit **of around INR 42,000 Crores to the Industry.**

2. Government's support on some of the submissions made by COAI in wake of COVID-19 outbreak:

In the situation of the outbreak of the COVID-19 in the country, there was need to ensure the availability and continuity of our telecom operations. To run 24*7 as an essential service, COAI made various representations to DoT/TRAI and other Government agencies for the support to run the network operations smoothly, in the lockdown situation. The key requests of COAI agreed by various Government agencies are as below:

- a. Secretary DoT has referred the matter to Member-Finance for his recommendation and action:
- Providing low cost funding
 - Reduction in Regulatory levies (LF& SUC)
 - Exempt GST on Govt. levies
 - Exempt service tax on LF/SUC payable by Telecom Operators in compliance with Hon'ble Supreme Court order
- b. DoT agreed to look into the issue of conversion from pre-paid to post-paid connections and vice-versa without disconnection of the number.

- c. DoT provided the relaxation till April 30, 2020 on Postponement of Monthly and Quarterly CAF audits considering COVID-19 Outbreak.
- d. On the request of COAI that streaming platforms to undertake technical measures such as moving from HD to SD streaming to ease the pressure on infrastructure, DoT agreed to take up the issue with the platform providers and they have reduced the streaming from HD to SD.
- e. DoT issued letter to Chief Secretaries of all States/UTs to designate Nodal officers to be contacted by companies in case of issues pertaining to Exemption of Warehouses & Network Operation Centers (NOC) etc. for Telecom & IT Industry from Prohibitory Orders of State Government & Local Authorities.
- f. DoT has extended due date for submission of EMF self-certificates to 30 days from 15 days.
- g. Ministry of Home affairs has issued a notification that for all foreigners in India, the VISA has been extended till 30th April. DoT vide e-mail dated April 4, 2020 has allowed extension of validity of such connections till the extension of Visa.
- h. Ministry of Finance accepted the request of COAI that TDS certificate issued in FY 20 for lower deduction of tax should be automatically extended till June 2020.
- i. TRAI vide its letter dated March 29, 2020 agreed with COAI request and has granted a relaxation of six weeks from the respective due dates in respect of all monthly and quarterly reports for the period ending March 31, 2020.
- j. Directions issued by DCP to all local police officials to allow unrestricted movement of employees of Telecom Service providers to ensure the operational continuity of telecom services.
- k. On the request of COAI, some of the Municipal Bodies de-sealed the towers to ensure the operational continuity of telecom services.

3. DoT Guidelines on “Approach towards the sustainable Communication”:

- a. COAI in its various representation to DoT & TRAI on the issue of “Approach towards Sustainable Telecommunications” (Green Telecom) had made following submission:
 - There should be only one target i.e. carbon abatement
 - There should not be any target for RET deployment
- b. Considering the submissions of COAI and after the TRAI's Recommendations on the issue, DoT issued its new guidelines on May 15, 2019 agreeing to the Industry request for voluntary adoption of the RET solution by the TSPs.
- c. It is estimated that these guidelines have saved around INR 66,000 Crores of the Industry.

4. TRAI Consultation on Floor price:

- a. COAI vide its letter RSM/COAI/2019/205 dated November 15, 2019 and RSM/COAI/2019/210 dated December 03, 2019, requested TRAI to fix floor tariffs (minimum tariff) for data services.
- b. Based on the request made by COAI, TRAI on December 17, 2019, initiated the consultation paper on Tariff issues for telecom Services i.e. on Floor Tariffs.

5. Implementation of Telecom Commercial Communications Customer Preference Regulations, 2018:

- a. COAI has made various submissions to TRAI on the issue of implementation of TCCCPR, 2018 and TRAI's direction dated 20.01.2020. TRAI has considered the submissions of COAI and has been considerate towards the issues being faced by the TSPs while implementing the DLT solution.
- b. COAI has engaged with the TRAI on the issue of the formats to submit the Performance Monitoring Reports and the submissions have been favourably considered by TRAI. TRAI, based on the submission, has simplified the PMR formats and have reduced the number of reports substantially.
- c. COAI has also published the advertisement on behalf of its member TSPs to ensure the compliance to the TRAI's direction to run the

advertisement campaign regarding the provisions of the regulations and the said Direction. This has helped the member TSPs to save the cost of running the advertisement campaign individually.

- d. COAI has also been instrumental to ensure that other associations are duly notified regarding the requirements their member entities are required to fulfil so that the provisions of the TCCCPR, 2018 gets implemented at the earliest.

6. M2M Communication Guidelines:

- a. COAI has made submissions to DoT on the issue of M2M services. DoT has considered the submissions of COAI and issued instructions on M2M services and the KYC of M2M subscribers on May 16, 2018.
- b. Thereafter, COAI has engaged with the DoT to discuss the provisions of the said instructions and the timeline to implement the same. Various submissions have been made to DoT to extend the implementation timeline and COAI was successful to get the extensions required for implementation till December 31, 2019.
- c. Based on the request from members, COAI submitted a letter on 24.01.2020, requesting the following:
 - Six months extension for implementing the M2M KYC guidelines for all M2M SIMs.
 - DoT should create a mechanism to allow certain enterprise more than four URLs/IP Addresses for a particular use case. DoT can open a separate cell looking into the demands of the enterprise.
 - Explore the possibility of making the M2M guidelines issued by DoT on 16.05.2018 applicable only for those M2M connections which were provided after 16.05.2018.
- d. DoT has agreed to allow more than 4 URLs/Public IP for various use cases in case TSPs come up with a common solution which ensures that there is no security breach.

7. World Radio Communication Conference 2019:

WRC 2019 was held from October 28, 2019 to November 22, 2019 in Sharm-el-Shaikh, Egypt. The outcome of the WRC-19 has been very pragmatic, especially in the identification of mmwave bands (>24GHz) for IMT. This identification and the resolutions have enabled efficient use of this spectrum between multiple services (including satellite for national usage). Even commercial deployments have started in some of these new IMT bands:

Band (Ghz)	Amount (GHz)	Remarks
24.25 – 27.5	3.25	Globally Harmonized
37 – 43.5	6.5	Globally Harmonized
47.2 – 48.2	1	Region 2 and 65+ (incl. India)
66 – 71	5	Globally Harmonized

COAI has further requested DoT to review National Frequency Allocation Plan (NFAP) with the outcomes of the World Radio communication Conference 2019 and formation of National Study Groups for preparation to contribute to ITU-R SG5.

8. TRAI Consultation Paper on Allotment of Spectrum to Indian Railways for Public Safety and Security Services issued on June 24, 2019:

Following were the key submissions made by COAI on the Consultation Paper:

- 700 MHz band is extensively used for commercial mobile services globally and a comprehensive eco-system is available for this band. Many countries are also carrying out 5G trials in this band.
- In India, 700 MHz band has already been identified for IMT. Given the importance of this band, it has also been identified as one of the key bands for deployment of 5G in India by the 5G High Level Forum constituted by DoT.
- It is important to understand that in India, out of 45 MHz (paired) of 700 MHz band, 10 MHz (paired) has already been assigned to MoD. This leaves only 35 MHz (paired) amongst four TSPs. In case any new TSP plans for 5G in this band in India, then 35 MHz (paired) is grossly inadequate. Thus, it would not be appropriate to fragment the band any further.

- COAI strongly recommended that no spectrum from 700 MHz band which has for long been identified for IMT in India should be given to railways for any kind of services.

The Authority recommended in October 2019 that out of the 35 MHz (paired) spectrum available in 700 MHz band, 5 MHz (paired) spectrum may be allocated to Indian Railways for implementing ETCS Level-2, MC PTT + Voice, IoT based asset monitoring services, passenger information display system and live feed of Video Surveillance of few coaches at a time. The remaining 30 MHz (paired) in 700 MHz band may be put to auction in the forthcoming auction. Spectrum may be assigned to Indian Railways on administrative basis for captive use only and not to offer any commercial services such as Wi-Fi onboard.

9. EMF Biennial Certificate Submission:

- COAI had highlighted to DoT that online Biennial Self-Certificate generation and submission using the Tarang Sanchar Portal for the current biennial cycle can begin only when all the modifications to be done in the portal basis Revised Test Procedure and implementation of signage on field are completed, in order to generate Self-Certificates complying with the new test procedure requirements. Basis submissions made by COAI. DoT granted the extension of timeline for current EMF certification biennial cycle (March 31, 2019) by one year i.e. March 31, 2020 vide DoT's notification of File No. 800-15/2010-VAS dated January 31, 2019. The EMF Biennial Certificate Submission of more than 12.5 lakh Certificates for this cycle has been completed.





10. 5GIF Evaluation Report:

The 5G India Forum (5GIF) has been established under the aegis of COAI, aiming to become the leading force in the development of next generation communications and will enable synergizing national efforts and will play a significant role in shaping the strategic, commercial and regulatory development of the 5G ecosystem in India.

The 5GIF IEG is one of the registered Independent Evaluation Groups (IEG) for evaluation of the new 5G (or also known as IMT-2020) candidate radio technologies. This group was formed by the COAI to evaluate these technologies from the perspective of Indian telecom network deployments for 5G. The group consist of operators, OEM's, universities and individual experts participating in a collaborative manner.



The final report of the 5GIF IEG is now published (5D/136) by the ITU-R WP5D group that is evaluating 5G (IMT-2020) technologies. The 5GIF IEG evaluated candidate radio interface technology (RIT) submissions under two categories. The first category involved candidate RIT submissions belonging to the class of globally harmonized standards that are based on technologies developed by the 3GPP (specifically 3GPP New Radio). This was primarily to understand from the COAI perspective on how these technologies would impact Indian networks. The second category of evaluation was on a couple of technologies not belonging to this

category of globally harmonized standards. These technologies do not interwork with 3GPP networks (yet) and are of minimal interest. But for many of the members participating in this activity, these technologies posed academic interest. The report was well received by the delegates present at the ITU WP5D meeting#34 held in Geneva from February 19 – 26, 2020.

11. ICNIRP Update on EMF Guidelines:

The latest update from ICNIRP published in March 2020 (Refer <https://www.icnirp.org/cms/upload/publications/ICNIRPrfgdl2020.pdf>). is based on scientific reports prepared for the World Health Organisation (WHO), the European Commission, national expert groups and continuous monitoring of new research. The process has taken seven years and there was a public consultation in 2018 with more than 1,000 comments from over 120 organisations.

The safety guidelines retain a high level of protection with limits set well below the thresholds for established hazards for all radio frequencies from 2G to 5G. Where changes have been made, these recognise the importance of higher frequencies above 6 GHz to 5G, and provide more detailed guidance for this range. ICNIRP has also introduced a new absorbed power density limit above 6 GHz. The updated guidelines have been anticipated by the industry for some time and test methods exist to ensure the compliance of 5G devices in the market.

(Refer <https://www.icnirp.org/en/rf-faq/index.html> for FAQs).

It should be noted that the exposures from 5G networks are well below these thresholds. As ICNIRP states **'The most important thing for people to remember is that 5G technologies will not be able to cause harm when these new guidelines are adhered to.'**

12. Spectrum Interference Issue through Sale of Illegal Repeaters/Boosters on e-commerce platforms/websites:

As per the license condition, for providing the service, the licensee shall utilize any type of equipment and product that meet TEC standards, wherever made mandatory by the licensor, from time to time. Thus, as per established norms, telecom service providers shall install repeaters after thorough inspections, only after a request is raised or there is a requirement. TSPs need to ensure that installing a repeater doesn't hamper the network coverage for people outside the distribution area. Such devices manage available signal's input-output mechanism and provide adequate network connectivity to a targeted (and its surrounding) area, thereby covering the entire low-network zone.

However, these repeaters were being illegally sold online. COAI wrote to the e-commerce websites/platforms regarding the sale of mobile signal boosters/repeaters used for enhancement of signals in 800 MHz/ 900 MHz/ 1800 MHz/ 2100 MHz/ 2300 MHz bands, which are licensed telecom spectrum bands assigned to the service providers, who are licensed by the Central Government under Section 4 of the Indian Telegraph Act to provide mobile telephony services. The Act prohibits possession of such apparatus without a licence and possession and sale of such equipment, without obtaining requisite permissions under the Act and Rules framed thereunder, constitutes violation of the provisions of the Act. Most of them immediately acknowledged COAI's submissions and ceased and discontinued selling mobile signal boosters/repeaters on their website/ platform.

13. Submissions of SACFA Applications through SARAL SANCHAR Portal:

Various representations were made by COAI to the Government regarding simplification of SACFA Application and Clearance Processes. It was submitted that although WPC has taken several initiatives in the past for streamlining processes, however, we are still facing constraints on account of current SACFA applications and clearance procedures which are causing significant delays in the issuance of SACFA clearances of our telecom sites which subsequently hamper the timely operationalization of our telecom network.

DoT has made the **SARAL SANCHAR** portal functional for submission of SACFA Applications, which has helped in easing the process and significantly improved efficiency, resulting in faster clearances and transparent working towards ease of doing business and an enabler for higher mobile broadband penetration for the country supporting the Digital India initiative of the Government.

14. Digital KYC:

DoT issued the final guidelines on April 3, 2019, for implementation of the alternate digital KYC process for verification of subscribers, which are mostly based on the submissions made by COAI.



Post the judgment of the Hon'ble Supreme Court on Aadhaar, COAI and its members approached the DoT proposing minor modifications to the DoT guidelines dated August 24, 2015, allowing the CAF to be embedded with photograph and scanned images and thereby digitize the end to end process for on-boarding of new subscribers by making it completely paperless. COAI submitted that the return to paper-based processes should not be an option as that will reverse the steps taken by the industry towards Digital India and would result in wastage of existing investments and infrastructure.

This Digital KYC process is an app-based customer enrolment method in which live photograph of customer will be clicked by the PoS and embedded in the form along with his/her Pol/PoA. The PoC of the same was conducted by all the TSPs prior to the issuance of the guidelines. COAI also submitted to DoT that the stabilization of the Digital Process is likely to take time considering that the process will have to be implemented across millions of retailer points and company stores across the country and the same, being a new process, is likely to encounter

challenges and certain fixes will be required for the process to work perfectly. Hence, the extension for implementation of the same was also provided by DoT and the final date for full implementation and roll out of the process was June 30, 2019.

DoT also issued the guidelines for carrying out audit of CAFs of the mobile connections activated through this alternate Digital-KYC process on October 16, 2019, mentioning that the guidelines will be valid from one month of the date of issuance. However, some points in these instructions needed clarification/updation and hence, these were taken up with DoT and reasonable extension was provided by the DoT.

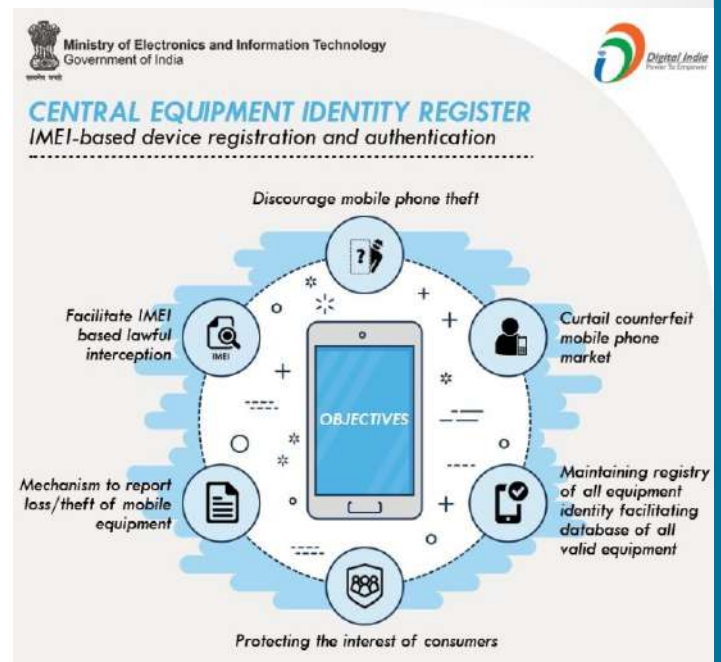
DoT issued the guidelines for carrying out audit of CAFs of the mobile connections activated through this alternate Digital-KYC process on October 16, 2019. However, some aspects in the same needed clarification/updation and the extension was sought on implementation of mandatory PoS address fields in CAF & database and capturing the live photograph of PoS agent & storing it in the backend database for submission to DoT/ DoT LSA Field Units pertaining to D-KYC process.

15.CEIR (Central Equipment Identity Register):

Hon'ble Minister for Communications, Law & Justice and Electronics & Information Technology, Shri Ravi Shankar Prasad, launched the web portal “Central Equipment Identity Register” on December 30, 2019, in Delhi through which the lost and the stolen phone can be directly blocked/tracked for people who have lost their cell phones or their cell phone has been stolen by someone by using simple techniques or better known as the IMEI number which is a Unique Identification number of each handset that has been sold in India for very long.

COAI along with its members had been diligently working with government towards the PoC on implementation of CEIR which was undertaken in Maharashtra LSA with major TSPs of MH LSA, i.e., BSNL, Bharti Airtel, Reliance Jio and Vodafone Idea. Several activities such as enabling the features in live network nodes, arranging vendor support for configuration changes and development work, planning and arranging media for integration with CEIR, development/changes in the IT Network etc. had

to be carried out for implementation of CEIR in Maharashtra LSA.



- First, the person will have to make an FIR filed in the name of his or her mobile handset.
- After successful police verification, the FIR copy will be awarded to the person.
- Then the person will have to inform DoT via a helpline number 14422.
- The DoT will then blacklist the IMEI number.

Ways To Block The Mobile Set:

There are three ways through which one can block his/her mobile handset through the central equipment investigation register:

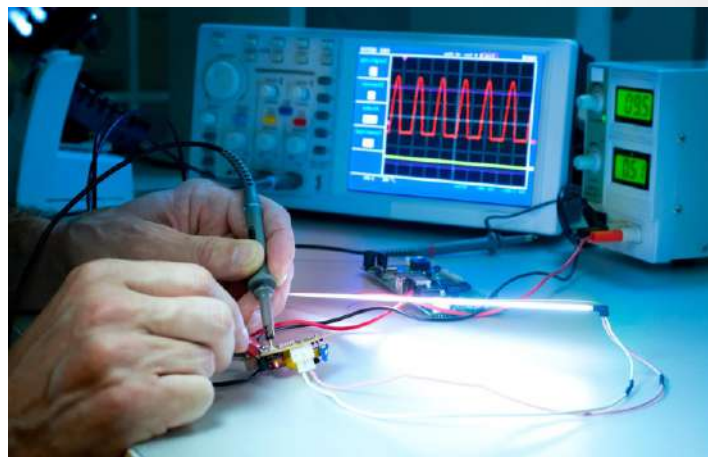
- Through Telecom Service Provider
- Through central police
- Through online registration form: First, the person needs to lodge an FIR against the stolen mobile phone. After successful FIR, the person will have to take a duplicate SIM card of his or her previous number as stolen and will then have to fill up the Application Form as below. Submit all the relevant documents such as the FIR copy & an identity proof can be Aadhaar/voter ID card. A request ID will be generated when the form will be successfully submitted and the request ID need to be kept for future use.

16. Prepaid Mobile Services in J&K, Assam & North East Service Areas:

DoT issued instructions on March 31, 2020 and provided unlimited extension of pre-paid mobile services in J&K, Assam and North East Service Areas mentioning that these services in these areas shall be operational on continuous basis with effect from April 01, 2020 subject to condition that the existing subscriber verification conditions, security conditions/safeguards, penal provisions, etc. stipulated by the Licensor/Government shall continue to remain in force. Usually, DoT had been providing this extension for a period of a year; however, this time they have extended the same to the period of the license, the way it is in rest of the country.

17. Mandatory Testing & Certification of Telecom Equipment (MTCTE):

The Government had mandated the testing & certification of all telecom and ICT equipment from Indian labs vide its Gazette notification issued on 5th September 2017. As per the initial notification, the MTCTE scheme was to be implemented w.e.f. 1st October 2018, however, vide its various submissions to Department of Telecommunications and Telecommunication Engineering Center, COAI had highlighted various challenges and concerns with respect to the implementation of MTCTE. COAI had requested the authorities that MTCTE should not be implemented until sufficient test labs are established in India and all related technical and procedural challenges are addressed. It was also requested that MTCTE should be implemented in a phase-wise manner; with considerable time-gap between each phase, instead of implementing as a whole at any given time. Basis COAI's submissions, various changes have been facilitated by the authorities on the testing & certification procedures and guidelines as well as in the functionality and design of the MTCTE portal. As requested, MTCTE is now being implemented by TEC in phase-wise manner only and phase-I has been implemented with effect from 1st October 2019 with selected product categories and acceptance of ILAC reports till 30th March 2020. TEC is now working to extend the timelines for acceptance of ILAC reports and to provide minimum 4-6 months for implementation for to-be notified forthcoming phases.



18. Single Brand Retail Trading (SBRT) Policy:

In order to encourage the Foreign Direct Investment (FDI) in India, Department of Industrial Policy and Promotion (now Department for Promotion of Industry and Internal Trade (DPIIT)) released a Press Note No. 1 (2018 series) on 23rd January 2018, and made certain amendments to Single Brand Retail Trading (SBRT) policy. Although, new SBRT provisions exhibited an improvement from the last version, but certain clauses posed significant barriers and ease of doing business related challenges for our member companies in ICT sector. COAI closely coordinated with DPIIT as well as concerned industry stakeholders and made several representations to the department seeking favourable amendments to the SBRT policy. On 29th August 2019, Union Cabinet approved certain amendments in FDI policy for Single Brand Retail Trading. All four provisions as requested by COAI (mentioned below) have been approved by cabinet:

- a. All procurements made from India by the SBRT entity for that single brand shall be counted towards local sourcing, irrespective of whether the goods procured are sold in India or exported. Further, the current cap of considering exports for 5 years only is proposed to be removed, to give an impetus to exports.
- b. 'Sourcing of goods from India for global operations' can be done directly by the entity undertaking SBRT or its group companies (resident or non-resident), or indirectly by them through a third party under a legally tenable agreement.

- c. Entire sourcing from India for global operations shall be considered towards local sourcing requirement. (And no incremental value).
- d. Retail trading through online trade can also be undertaken prior to opening of brick and mortar stores, subject to the condition that the entity opens brick and mortar stores within 2 years from date of start of online retail.

19. Simplification of WPC Import License Requirements for Domestic Telecom Equipment Manufacturers:

Vide its several representations and rounds of follow-ups, COAI highlighted to DoT & WPC that current requirements and processes specified by WPC for import license requirements for domestic equipment manufacturers pose several challenges to the Indian factories acting as a global supply hub. These challenges not only put procedural burden in terms of efforts and cost duplications on both applicant and WPC, but also restricts the capability of timely delivery of the products by the manufacturer. Vide its letter dated 26th July 2019, DoT has simplified the import license requirements for domestic telecom equipment manufactures. As per the issued letter, the import process for domestic manufacturers has been simplified in the following way:

- a. Domestic OEMs in Domestic Tariff Area (DTA) are now allowed to import Transceivers/Radio Modules against their valid Dealer Possession License (DPL) without any need for import license and quantities as per requirements.
- b. Domestic OEMs are permitted to supply respective equipment to domestic customers against a confirmed purchase order and supplier proforma invoice.
- c. Domestic OEMs need to submit the prescribed undertaking to custom authorities and RLO along with technical information at the time of import.
- d. Sales to domestic customers will be permitted subject to possession of valid WPC frequency authorization by customer. OEMs need to give regular updates on import/distribution data in accordance to DPL terms.

20. Social Media Workshops with Armed Forces:

COAI has signed a Memorandum of Understanding (MoU) with Directorate of Indian Army Veterans (DIAV) for conducting the training programs across Army Skills Training Centres (ASTC) which are affiliated to Pradhan Mantri Kaushal Vikas Yojana (PMKVY) and Regimental Centres at various locations in India through its member organizations. The objective of execution of this MoU is to educate/update Armed Forces Personnel, their families, self-employed women and other attendees regarding the benefits and safe usage of digital platforms and services, use of social media for entrepreneurship and to make an effective and positive impact on day to day activities and operations.



Facebook, which is an associate member of COAI has partnered with COAI in conducting such workshops with a motive to educate the students, families, dependents etc. from Armed Forces families regarding safety and important features of Facebook, use of Facebook to promote and grow small/medium/large business (entrepreneurship) including ideas, interest, hobbies and stories. The workshops being conducted by Facebook and COAI can help the trainees across these ASTC and play a vital role in empowering them for the respective business opportunities. Starting from August 2019 to till March 2020, total 24 workshops have been organized by COAI & Facebook across 7 states in India.

Significant Achievements for the Year 2019-2020

Saved over
1 lakh Telecom Sites



16 States/UTs

aligned their Telecom Infrastructure Policies with RoW Rules, 2016

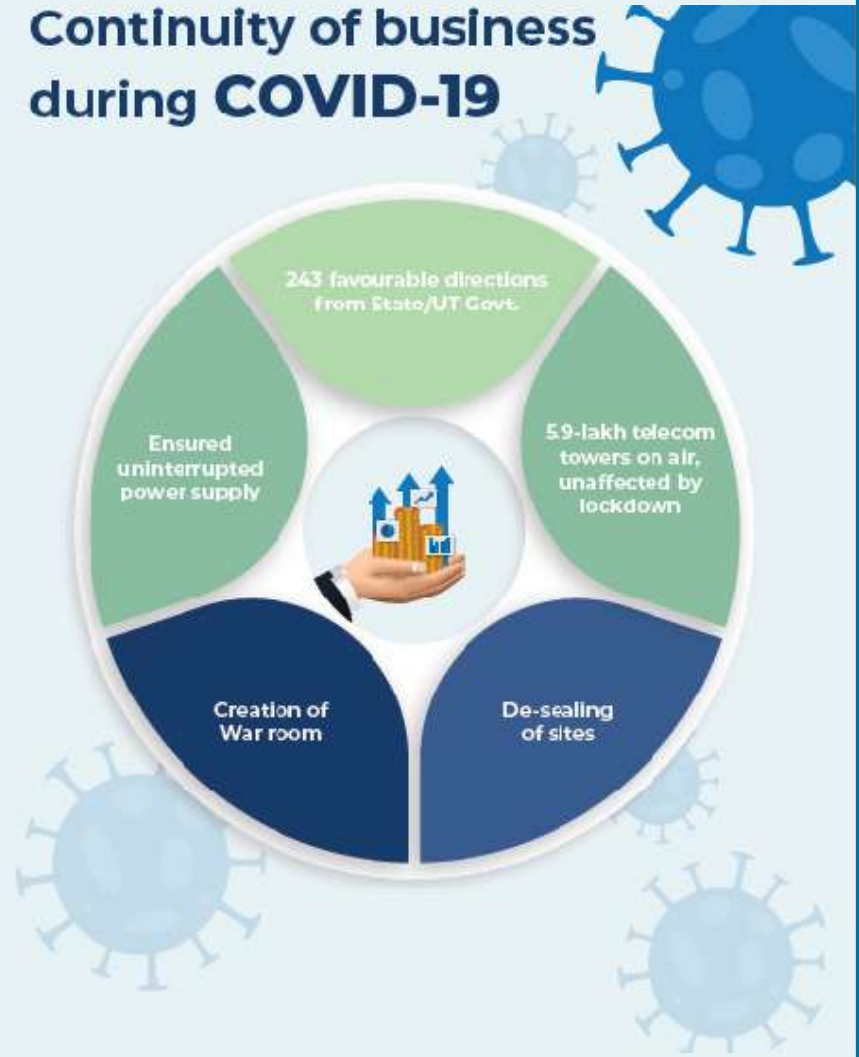


Shri Ravi Shankar Prasad
Hon'ble Minister for Communications, Electronics & Information Technology and Law & Justice, Government of India

EMF Advocacy

Debunked the prevailing myths regarding Emission from Telecom Towers

Continuity of business during COVID-19



21. Alignment of Telecom Infrastructure Policy with RoW Rules, 2016:

I. Policies aligned and notified:

The Right of Way Rules, 2016, are certainly a progressive and forward-looking step to achieve the Digital India vision and allows for the uniform growth of telecom infrastructure in all States, as it provides the process for grant of permissions for the installation of underground and overground telecom infrastructure, Single Window Clearance via an online portal, the appointment of nodal officers and simplifying documentation.

Till date, 16 States have aligned their Telecom Infrastructure policy with RoW Rules, 2016 that has streamlined hassle-free Right of Way processes. Some of the Telecom Infrastructure Policies like Odisha, Assam, Himachal Pradesh, Tamil Nadu Govt. Order, etc. are very progressive and help in an exponential growth of Telecom Infrastructure across the state.

II. Policies under discussion:

Policies of remaining States/UTs like Delhi, West Bengal, are under discussion with the government.

However, the delay in the alignment of State Telecom Infrastructure Policy and implementation issues faced on the ground is acting as the biggest roadblock to achieving this aim. DoT encourage the remaining States /UTs to align their policies with RoW Rules, 2016 for faster readiness of the state for contributing towards connected Digital India roadmap, encompassing programs like Smart Cities and Digital Society.



Policies Notified & Aligned		
S.No	State	Notified Date
1	Jharkhand	4th December 2015
2	Rajasthan	6th February 2017
3	*Tripura Government Order	8th September 2017
4	Odisha	14th September 2017
5	Haryana	6th October 2017
6	Assam	16th February 2018
7	Maharashtra	18th August 2018
8	*Tamilnadu Government Order	18th February 2018
9	Arunachal Pradesh	15th June 2018
10	Uttar Pradesh	15th June 2018
11	Uttarakhand	25th November 2018
12	Meghalaya	20th December 2018
13	Madhya Pradesh	8th March 2019
14	**Karnataka	29th May 2019
15	Nagaland	2nd December 2019
16	***Manipur	Approved by Cabinet, Notification awaited

* GO only (Detailed Policy is under discussion)
 ** Policy notified with some clauses not aligned with RoW rules, 2016
 *** Policy in line with RoW rules 2016 approved by Cabinet, Notification awaited.

S. No.	Existing Policy Under Advance Discussion	Draft Policies released, Notification pending	No Uniform Policy
	State/UT		
1	Chandigarh	Mizoram	West Bengal
2	Gujarat	Punjab	Andaman & Nicobar
3	Goa	Himachal Pradesh	Lakshadweep
4	Chhattisgarh	Jammu & Kashmir	Dadar & Nagar Haveli
5	Andhra Pradesh	Kerala	Daman & Diu
6	Telangana	Sikkim	Ladakh
7	Pondicherry	Delhi	
8	Bihar		

Status - Single Window Online Portal

State's Online Single Window Clearance Portal Development		
S.No	State/UT	Online Portal Status
1.	Jharkhand	Operational
2.	Haryana	Operational
3.	Uttar Pradesh	Operational
4.	Uttarakhand	Operational
5.	Madhya Pradesh	Operational
6.	Delhi	Operational
7.	Tamil Nadu Govt.order	Under Discussion
8.	Assam	Under Discussion
9.	Odisha	Under Discussion
10.	Rajasthan	Under Discussion
11.	Maharashtra	Under Discussion
12.	Karnataka	Under Discussion

#Source: Information collated by COAI

22. Telecom Sites saved during 2019-2020:

COAI's intervention at the circle level has led to saving of the telecom infrastructure for continuity of the business.

- a. **300 Pole sites activated in Mumbai:** 300 pole sites of our members are installed since 2008 (year) on flyovers across Mumbai circle were switched-off by Maharashtra State Road Development Corporation Limited (MSRDC). Post COAI's intervention, all 300 sites were activated again.
- b. **Sites de-sealed during the year:** Post COAI's intervention and engagement with corporations across India, approx. 80 sites were de-sealed.
- c. **Regularisation of Tower:** Post COAI's intervention and engagement with corporations across India, approximately 1 lakh towers were regularised across India.

23. Continuity of business during COVID-19:

Ensuring network availability and operational continuity of the essential telecom services and robust telecom infrastructure during the critical period when restrictions were imposed for COVID-19, the Telecom Infrastructure Committee and Circle Coordination Committees marshal their resources for a quick and effective response.

- a. **Engagement with the Central Government, State Governments, Central DoT Officials and LSA officials of DoT:** Industry engaged the Central Government, State Governments, Central DoT Officials and LSA officials of DoT to ensure uninterrupted telecommunication services & deployment of telecom infrastructure during COVID-19 pandemic. 243 favourable directions were issued across India to ensure movement of employees of Telecom Service Providers and their contractual staff.
- b. **Fibre cut stopped:** Post COAI's intervention, the number of optical fiber cuts, were reduced from approximately 100 per day from before the quarantine to approximately 19 fiber cuts during the period of the quarantine i.e. during the period of 24th April 2020 – 3rd May 2020.
- c. **Sites de-sealed:** Industry engaged municipalities of Delhi, Ghaziabad, Noida, Gurugram, Faridabad, Punjab, Haryana, J&K and Chandigarh for de-sealing of the existing sealed sites having permissions to ensure uninterrupted connectivity round the clock to support the Work From Home, delivery of various critical services and maintain communication across the State including for those involved in the rescue and preventive operations against coronavirus at various levels.

Post COAI's intervention, approximately 40 sites were de-sealed by local municipalities across Mumbai and Rest of Maharashtra while 5 Site were de-sealed by Delhi MCD.

- d. **Ensure availability of diesel to the industry sites:** DDG (T) and Chief Secretary of various states were engaged for making the available requisite supply of diesel per day for maintenance of telecom services across the states/UTs, by allocating dedicated petrol pumps or any other workable arrangement during the lockdown period during COVID-19 i.e. during the period of 24th April 2020 – 3rd May 2020.

CCCs played a vital role and did tremendous hard work to ensure the operational continuity of telecom services given COVID-19 outbreak. Same was also appreciated by the Hon'ble Prime Minister, Shri Narendra Modi, in his speech recently.



“ जरा सोचिये कि आप lockdown के समय भी जो TV देख पा रहे हैं, घर में रहते हुए जिस Phone और Internet का इस्तेमाल कर रहे हैं – उन सब को सुचारू रखने के लिए कोई न कोई अपनी जिंदगी खपा रहा है। इस दौरान, आप में से अधिकांश लोग जो Digital Payment आसानी से कर पा रहे हैं, उसके पीछे भी बहुत से लोग काम कर रहे हैं। Lockdown के दौरान यही वो लोग हैं जो देश के काम-काज को संभाले हुए हैं। ”

'मन की बात' में प्रधानमंत्री नरेंद्र मोदी, 29 मार्च 2020

24. Public Facing Advocacy on EMF Issues across identified Circles:

The issue of health concerns from the radiations of mobile phone towers/networks has been in the limelight for some time. In this regard, several studies have been conducted in different countries, under the aegis of World Health Organization (WHO). There is no conclusive scientific evidence of adverse health effects due to RF emission from mobile towers. WHO has referred to approximately 25,000 studies, conducted around the world over past 30 years, and based on an in-depth review of scientific literature, has concluded: "current evidence does not confirm the existence of any health consequences from exposure to low-level electromagnetic fields". Since the effects on human beings are to be studied over a long period, further studies are going on around the world.



Shri Ravi Shankar Prasad, Hon'ble Union Minister for Law & Justice, Communications and Electronics & Information Technology

The Department of Telecommunications (DoT) has time and again re-iterated that the EMF Radiation from mobile towers doesn't have adverse impact on human health. EMF Awareness Session led by DoT was organized on 30th January 2020, at Panchsheel Club, Delhi to spread awareness around the scientific facts about the EMF emissions from telecom towers.

DoT officials re-iterated that government relies on WHO 20,000 studies and reports are reviewed every 10 years. Speakers asserted tower radiation is not harmful and India has strict radiation norms that are 10 times stricter than the world standard. DoT confirmed that towers are safe and it can be installed at any location Panel re-iterated that WHO has concluded that

'...current evidence does not confirm the existence of any health consequences from exposure to low-level electromagnetic fields'. A committee comprising of RWA members, COAI and TSP/IP to identify the sites for the towers.



In a recent development, on 11th March 2020, The International Commission on Non-Ionizing Radiation Protection (ICNIRP) has released new guidelines for the protection of humans exposed to radio frequency electromagnetic fields. The guidelines cover the upcoming 5G technologies, as well as AM and DAB radio, WiFi, Bluetooth and the currently used 3G/4G mobile phones. The new electromagnetic field guidelines have taken seven years to develop after a thorough review of all relevant scientific literature, scientific workshops and an extensive public consultation process. They provide protection against all scientifically substantiated adverse health effects due to EMF exposure in the 100 kHz to 300 GHz range."

Also, recently, the Australia's Chief Medical Officer has re-iterated that "I'd like to reassure the community that 5G technology is safe. There are no evidence telecommunication technologies, such as 5G, cause adverse health impacts."

All these international studies are being shared with the Doctors, DoT LSA officials, Academic and influential community to sensitize them with the latest scientific knowledge so that myths surrounding the health impact of EMF are displaced.

25. Customs Duty for Routers:

As per the existing provisions of Customs Tariff Act, 1975, "Routers" have been categorized under HS Code 8517 69 30 with Basic Customs Duties as Zero. Further, Routers are a part of the Information Technology Agreement (ITA-1) and therefore no custom duty is applicable on the import of these devices.

In the finance bill HS Codes 8517 69 30 with Basic Customs Duties as Zero for Routers was omitted.

Consequent to above, Routers may fall under the classification under customs tariff item 8517 62 90 (residual entry) against which the statutory rate of Basic Customs Duty is 20%.

This will cause ambiguities and concerns to the industry stakeholders with respect to the import processes and cost implications in terms of customs duties.

Representation sent to MoF and to DoT requesting the following.

- a. The alternate HS Code(s) for "Routers" should be defined at the earliest.
- b. There should be no hike in Basic Custom Duties for "Routers".

Notification issued by the Ministry of Finance. New HS Code defined for Routers with Zero Custom Duty



26. April 25, 2019, DoT issued circular No. 1-28/2006/LF-II (LPA Division) with regard to Deduction Verification of ILD Operation:

DoT has issued an order wherein ILD operators have been allowed to submit only the Statutory Auditor's Certificate for the purpose of verification of deductions on paid basis from FY 2013-14 to FY 2018-19. This will ease the process of pass through charges.

Financial impact of the same is approx. INR 100 Cr.

27. Automation for Assessment of LF/SUC process:

Post various discussion held with DoT/CCAs, DoT is in the process of implementation of a Revenue Management Software (RMS)-SARAS (System for Assessment of LF Revenue and SUC), which would digitize the assessments, payment and accounting of license fees, spectrum usage charges etc.

SARAS would enable the Licensee to make online payments, digitally file and verify deduction claims, AGR statements, bank guarantee details along with enabling the Department to conduct online assessment of LF and SUC, management of bank guarantees, handle representations etc. This will ease the process of deduction and verification.

The software is being developed by M/s NSDL Ltd. and EY is being appointed by DoT as consultant for this project.

Currently it is under trial by DoT.

28. DoT - Guidelines/clarifications for one-time deduction reverification exercise:

In February 03, 2020, DoT issued guidelines/clarifications for one-time deduction reverification exercise

DoT directed CCAs to re-open (Deduction Verification Report) DVRs of previous years for clearing all anomalies in verification in light of representations made by the industry.

Concerned CCAs are being directed by DoT to provide one-time opportunity to TSP vide a letter/e- mail issued to TSP to this effect.

TSPs were advised to submit their final appeal and all relevant documents within 15 days of receipt of letter/e-mail issued by CCAs in this regard.

During this one time reopening and reverification, fresh invoices as well as new supporting documents not submitted or considered earlier in support of existing Deductions Claimed on paid basis should be accepted and considered for verification.

All CCAs are to carry out a onetime reopening and re-verification exercise to implement the existing orders and these new Guidelines/Clarifications.

Vide this notification, DoT has issued clarification on various long pending issues. Post getting the clarification on few items after industry workshop in Goa in 2017, this is the second time, when DoT issued bulk clarification on industry issues.

This will help the operators in reduction of disallowance.

Some of the points clarified by DoT are as follows:

- a. Objection Report and Speaking Order to be provided to TSP with 15 days' time for representation.
- b. Deductions were restricted to lower of cash or accrual claims. Same can be claimed on amount actually paid basis.
- c. Simplification of TDS Certificate Process – to claim the deduction, operators may submit a certificate by Statutory auditor/ Tax auditor.

- d. Disallowance of 3G Intra Circle Roaming Pass Through Charges - In some cases deduction for 3G ICR were allowed but was restricted to actual usages. DoT directed to CCAs that 3G ICR claims, including the minimum commitment/ premium usage charges, are admissible deductions, subject to submission of supporting documents (concerned invoice and bank statements).
- e. Disallowance of J&K GST paid under Amnesty scheme – CCA of J&K had disallowed GST paid amount claimed in AGR statement. Same is being allowed as deduction.
- f. Accordingly, deductions for the same may be allowed subject to submission of challans, along with a self-certification that the amount has been paid. Relevant DVRs to be revised accordingly.
- g. Disallowance of IUC charges paid to TSPs who have now closed their operations and the operator has the invoices: The IUC cost actually passed through to the closed operator related to this transaction may be allowed subject to the condition mentioned in the notification.
- h. Supplementary Invoices: Any supplementary invoice for pass through charges pertaining to BSNL will be allowed subject to verification of invoices and payment proofs, provided that they have been claimed earlier in the Audited AGR of the year of supplementary invoice.

Key Takeaway/s:

In February 03, 2020, DoT issued guidelines/clarifications for one-time deduction reverification exercise

DoT directed CCAs to re-open (Deduction verification report) DVRs of previous years for clearing all anomalies in verification in light of representations made by the industry.

This notification helped the industry in reducing not only significant costs on litigation / coordination but also eased situations with respect to funds which otherwise would have been blocked - thereby enhancing ease of doing business.

Submissions for the Year 2019-2020

1. TRAI Consultation Paper on Tariff issues of Telecom Services (Floor Tariffs) issued by TRAI on 17th December 2019:

COAI made following key submissions on this Consultation Paper:

- a. TRAI should change the existing regulatory regime of complete forbearance in tariffs and regulate tariffs to protect the interest of telecom service providers.
- b. Fixation of a floor price is the way forward to guarantee minimum revenue for the TSPs to ensure the viability and orderly growth of the sector.
- c. Complete cost recovery should be the objective of the floor price, which includes return on capital employed.
- d. Floor price should be fixed only for an interim period, say period of two years, after which the Regulator may review the Tariff regime.
- e. Floor price should be applied uniformly to all categories of subscribers and for all type of tariff plan offerings.
- f. Voice tariffs should remain under forbearance.

2. TRAI Consultation Paper on Review of Interconnection Usage Charges (ILD Termination Charge) issued on 8th November 2019:

COAI made following key submissions on the said Consultation Paper:

- a. Increasing the value of ITC will increase the share of Indian TSPs on the total tariffs charged, for the outbound calls from the foreign countries to India, thus allowing the Indian TSPs to earn revenue in the form of FOREX.
- b. Indian TSPs would be better placed in terms of ILD calling charges and can bring down the

outgoing ILD calling rates for the Indian subscribers.

- c. TRAI should specifically prescribe a much higher rate of ILD termination charge, considering the fact that ILD termination rates of other countries is far higher as compared to India.
- d. TRAI to kindly come out with the Regulatory Framework for OTT players at the earliest.

3. TRAI Consultation Paper on Traffic Management Practices (TMPs) and Multi-Stakeholder Body for Net Neutrality issued on January 02, 2020:

COAI in its response to the said consultation paper has made following submission:

- a. Similar regulatory framework, as applicable to the TSPs, to enforce the Net Neutrality principles, should be prescribed for all stakeholders, so that all stakeholders in the Internet ecosystem can be brought under the ambit of the Net Neutrality Principle. This will ensure the Neutrality in the whole ecosystem and not just at the network level (access providers).
- b. The service providers should be allowed to take the measures or actions necessary for the traffic management and network management, provided that the same does not affect the free competition and impede user choice.
- c. We submit that the Government should continue with the existing regulatory framework on Net Neutrality as enunciated in the licence amendment of 26.09.2018, while permitting TSPs to employ various traffic management practices as per the varying needs of traffic types, services and users and not issue any further rules/regulations on TMPs.

4. Payment of the Spectrum acquired by TSPs:

COAI submitted the letter to DoT on February 07, 2020 highlighting following issues on the payment terms for the spectrum acquired by TSPs:

- a. Reduction in SUC: Effective rate of the SUC should be reduced by 3% for all the TSP's in each service area, after removal of existing SUC floor of 3% of AGR. Nominal rate of SUC, say 0.5-1% of AGR, should be prescribed for forthcoming auctions for recovering only the administrative cost.
- b. Payment for spectrum acquired by the TSPs:
 - Reduced uniform up-front charge of 10% of the winning price for every band in the spectrum auctions.
 - Option should be given to operator to either stay with the current moratorium scheme or opt for similar reduction in uniform up-front charge of 10% of the winning price for every band at each auction level for auctions held in past.
 - Seek upfront charge at the time of the assignment of the spectrum only, without any interest.
 - B.G. for an amount equal to 5% of the final price as a security till the time upfront payment is made.

5. Support from the Government to Address the Current Health of the Telecom Sector:

COAI submitted the letter to Secretary DoT on February 26, 2020 with a copy to Hon'ble MoC and the DCC members. COAI vide its said letter made following request:

- a. AGR related payments:
 - Government to allow set-off of GST credits lying with the government.
 - Payment of balance amount of interest, penalty, and interest on penalty be allowed in a staggered manner.
 - Alternately, Government may consider granting loan equal to the AGR amount at 6% rate of interest

- b. Reduce License fee from 8% to 3%
- c. Reduction in SUC: Rate of the SUC should be reduced by 3% for all the TSP's in each service area, after removal of existing SUC floor of 3% of AGR.
- d. Immediate implementation of Floor Price for Data services
- e. GST Waiver on sovereign payments
- f. Review of need for Bank Guarantees (Bgs)

6. TRAI consultation paper on Review of Per Port Transaction Charge and Other Related Charges for Mobile Number Portability issued on February, 22, 2019 and updated on April 01, 2019:

COAI in its response to TRAI made the following submissions:

- a. Methodology adopted by TRAI to calculate the Per Port Transaction Charge (PPTC) should be continued. The additional cost of 1-3% of the overall costs, on account of changes in MNP process, be included in the overall costs.
- b. There should not be any charges for number return, port cancellation and NPD requests which is to be paid by the TSPs to MNPSPs as the activities pertaining to these charges are required to be carried out by the service providers to comply with the Regulations.
- c. The Dipping Charges should continue to be under forbearance.
- d. DoT to allow the deduction of Per Port Transaction Charge paid by the Recipient Operator from its Gross Revenue for calculating AGR for the purpose of payment of license fee and SUC.

Furtherance to the above mentioned consultation, TRAI issued the draft Telecommunication Mobile Number Portability Per Port Transaction Charge and Dipping Charge (Amendment) Regulations, 2019 on August 16, 2019. COAI made following submission to this draft regulation:

- a. Costs on account of consultancy and related charges should not be considered as part of the cost for the calculation of PPTC.

- b. Separate charges for providing ancillary services are not necessary as the costs for providing all the services have been considered while arriving at the PPTC.
- c. TRAI to issue appropriate regulations / recommendations to create a competitive environment in MNP.
- d. TRAI to consider adoption of blockchain which may reduce the cost of porting and increase the efficiency of the process.

TRAI issued the final regulation on September 30, 2019 and prescribed the PPTC at Rs. 6.46. This has come into effect from November 11, 2019.

7. TRAI Consultation Paper on Review of the Regulatory Framework for Interconnection issued by TRAI on 30th May 2019:

COAI in its response to TRAI made the following submissions:

- a. Authority should do away with the archaic requirements like interconnecting at SDCA levels with the fixed networks of the PSUs and the interconnection at Level-II (LDCA level) or Level-I TAX.
- b. Considering traffic and redundancy requirements, a finite number of POIs i.e. 3-4, at the circle level should be mandated for both PSTN to PSTN and Mobile to PSTN connectivity at the circle level.
- c. Similarly, Point of Interconnection for NLDO-PSTN and Mobile-PSTN connectivity should also be reviewed and connectivity should be mandated at 3-4 locations in the licensed service area as recommended for PSTN-PSTN.
- d. As a futuristic requirement, TRAI should consider doing away with licensed service area wise interconnection requirements. TRAI may recommend to DoT for the change in the Licence conditions in this regard.
- e. There should not be any Transit Carriage Charge and TAX Transit Charge levied upon any of the TSPs once the traffic has been handed at the declared Point of Interconnect.

8. TRAI Consultation Paper on Review of Scope of Infrastructure Providers Category-I (IP-I) Registration issued by TRAI on 16th August 2019:

The key submissions made by COAI on said Consultation Paper are as below:

- a. Pass through should be allowed for any consideration paid by one TSP to another for active infrastructure sharing.
- b. In case Pass through is not allowed in such case either:
 - i. Scope of the IP-1 is enhanced under Registration: In such scenario:
 - Active infrastructure should be only provided to licensee(s)
 - Active infrastructure can be procured by IP-I for sharing with licensee(s) only basis the agreement between licensee and IP-I.
 - ii. Scope of the IP-1 should not be enhanced under registration. In case the Scope of IP-1 is enhanced, the same should be done by introducing new UL (Authorisation):
 - In such scenario as well, UL (Authorisation) to provide services ONLY to UL licensee having Access Authorization.
 - Compliance to various guidelines should be made mandatory for such entities

9. TRAI Consultation Paper on Reforming the Guidelines for Transfer/Merger of Telecom Licenses issued by TRAI on 19th September 2019:

COAI in its response to TRAI made the following submissions:

- a. No separate approval should be required from Licensor after the Transfer/Merger of the licenses is sanctioned by Tribunal/Company Judge.
- b. There should not be any commitment imposed on the merged entity to set aside 20% of wholesale capacity for the MVNOs on Mobile Bitstream Access (MBA) basis.

10. TRAI Consultation paper on Transparency in Publishing of Tariff Offers issued by TRAI on 27th November 2019:

The key submissions made by COAI on this Consultation Paper are as below:

- a. Endeavor of the Regulator needs to be reduction in the cost of the compliance for TSPs & also ensure that the consumers receive clear and concise information on tariffs.
- b. Current TRAI Regulations are sufficient to address the interests of the consumers on disclosure of complete terms & conditions of the tariff offers in a transparent, clear and simple manner.
- c. Other than the presently prescribed format, there is no need for any new regulation/order to prescribe formats for other modes for the publication of the tariff offers.
- d. TSPs are already publicising their tariff offers on their website in an effective manner, there is no requirement of any additional regulatory intervention

11. TRAI Pre-Consultation Paper on Enabling Unbundling of Different Layers Through Differential Licensing issued on 9th December 2019:

COAI in its response to TRAI made the following submissions:

- a. Differential licensing regime for different layers amounts to moving away from the principles of unified licensing and convergence.
- b. There is no requirement of unbundling various layers of the license as the current licensing regime supports the layered approach w.r.t Infrastructure, Service and Applications.
- c. Objective of introducing different licensing layers can be achieved by providing appropriate Policy and Financial stimulus to the existing TSPs i.e.
 - By allowing Pass-through for any consideration paid by one TSP to another for active infrastructure sharing.

- By allowing sharing of Core network elements.

12. TRAI Telecommunication Mobile Number Portability (Seventh Amendment) Regulations:

TRAI had issued the seventh amendment to the Telecommunication Mobile Number Portability Regulations (MNP Regulations) on December 13, 2018. The amendment was to be effective from June 13, 2019. COAI, vide its letter dated May 09, 2019, requested TRAI to extend the time line for implementation of the Regulations till September 30, 2019.

13. TRAI Consultation Paper on 'Provision of Cellular backhaul connectivity via Satellite through VSAT under Commercial VSAT CUG Service Authorization' issued on January 29, 2020:

The key submissions made by COAI in its response are as below:

- a. Commercial VSAT CUG service provider should be permitted to provide backhaul connectivity for mobile services only.
- b. There is no pertinent need to allow Commercial VSAT CUG service providers to provide bare backhaul capacity to Wi-fi hotspot providers and the same can be provided as Internet connectivity/ bandwidth to the ISPs provisioning Wi-fi hotspots.
- c. The scope of the VSAT should be enhanced to the extent of providing the satellite based backhaul to the mobile services and the long-distance carriage rights, granted for NLD, ILD and access services should not be covered under the scope of this service.
- d. To have equity across different license, WPC spectrum charges for VSAT services in NLD/ Access License should be charged at a percentage of AGR from the provision of the VSAT services instead of existing formula-based mechanism.

14.COAI Submissions on TRAI TCCCPR, 2018:

TRAI had issued the Telecom Commercial Communications Customer Preference Regulations, in July, 2018. COAI has been coordinating with various industry stakeholders in order to ensure that the industry implements the provisions of the said Regulation. COAI has played a key role in preparation of the Code of Practices which has been adopted by all the telecom service providers. COAI had also engaged various vendors for implementation of the Distributed Ledger Technology (DLT) based solution as provisioned in the Regulations. For the year 2019-20, following submissions were made by COAI:

a. Submission on Performance Monitoring Report: TRAI had prescribed the Performance Monitoring Report (PMR) format and asked the TSPs to submit the reports for the month of March 2019 and onwards. Vide our letter dated May 14, 2019, COAI had raised various concerns of the TSPs w.r.t. the prescribed PMR formats and the issues being faced by the TSPs to implement the provisions of the TCCCPR, 2018.

Furtherance to the above, TRAI issued a Direction on 06.08.2019 prescribing the format to submit the Performance Monitoring Report on monthly basis. In this regard, COAI, vide its letter dated September 16, 2019, submitted certain limitation of the TSPs in submitting the reports in the desired format as the DLT solution of the TSPs were yet to be completed.

TRAI, vide its email dated 07.11.2019 prescribed supplementary PMR formats and asked the TSPs to submit the reports on these formats along with the already prescribed PMR formats on monthly basis. COAI, vide its letter dated November 26, 2019, submitted certain observations against these formats and requested TRAI to consider these observations.

b. Submission on definition of Transactional, Promotional and Service Messages: One of the important aspects of the TCCCPR, 2018 regulations is to have a common criterion to define and categorizes various commercial communications under the three defined categories i.e. Transactional, Promotional and Service. COAI conducted various meetings/calls and detailed deliberation amongst the member TSPs to ensure that the TSPs follow common criteria for categorization of commercial communications under these categories. COAI, vide its letter dated May 31, 2019, submitted to TRAI, the agreed position of the TSPs for these three categories along with the illustrations.

c. Submission on separate numbering series for Transactional and Service Calls: One of the provisions of the TCCCPR, 2018 is to take initiatives to enable the Calling Name Display (CNAM) based on Intelligent Network or ISDN based protocols, enhance Calling Name (eCNAM) functionality as defined in 3GPP technical specifications TS 24.196 for providing services to terminating users with the name associated with the originating user and optionally delivering metadata about the originating user. Vide COAI letter dated July 22, 2019, we had highlighted the issues/difficulties in implementing the CNAM and requested TRAI to consider recommending either different sub levels within 140 series or separate numbering series for service and transactional calls while the TSPs explore the possibility of implementing the CNAM.

d. Discontinuation of TRAI NCPR Portal: Vide our letters dated September 30, 2019, COAI had requested TRAI that as the DLT solutions of the TSPs are yet to be implemented completely, the TRAI NCPR portal should remain operational so that TSPs can redress the complaints being received through the portal and new preferences of the customers can be registered in the NCPR portal. Further, vide letter dated November 14, 2019, we again requested TRAI to continue with the complaint module of the NCPR portal till

November 30, 2019 as a fail-safe measure so that the TSPs can ensure the stability and effective functioning of the DL-Complaint module.

- e. Compliance to the TCCCPR, 2018:** TRAI vide its email dated 05.12.2019 sought status of compliance to the TCCCPR, 2018 from the TSPs. COAI, vide its letter dated December 12, 2019, the updates on the important deliverables under TCCCPR, 2018 and requested TRAI to sought the clause wise compliance once the TSPs completes all the implementation process.

Further, TRAI issued its Direction on 20.01.2020, directing the TSPs to ensure the compliance to the various provisions and stop the traffic of those entities that are not registered themselves/their headers/templates in accordance to the TCCCPR, 2018. TRAI also directed the TSPs to run a media campaign either individually or collectively informing the consumers and entities regarding the provisions of the regulations. COAI, on behalf of its member TSPs, published the advertisement and submitted the compliance to TRAI vide letter dated February 05, 2020.

COAI, vide its letter dated March 05, 2020, on behalf of the telecom industry, requested other Industry Associations/Organizations to advise their associated entities to take the required steps to enable the TSPs to comply with the provisions of aforementioned TRAI Direction.

Due to the COVID-19 outbreak and various restrictions being imposed nationwide, COAI, vide letter dated March 18, 2020, requested TRAI that the complete change and overhaul in the commercial communication mechanism can wait in order to avoid any possible adverse impact on the citizens and hence status quo should be maintained till March 31, 2020.

15. Review of Definition of AGR:

COAI submitted the letter to Secretary DoT on February 6, 2020 COAI vide its said letter made following request:

- a. Review the definition of AGR prospectively as mentioned in NDCP 2018
- b. Accept and implement the recommendations of TRAI on AGR dated January 2015.
- c. All kind of payments (either fixed or variable) made for any telecom input resource by one TSP (Licensee) to another TSP (Licensee) should be allowed as a deduction to the former.
- d. Constitute a Multi Stakeholder Committee under the aegis of DoT to work on the above highlighted issues.

16. Finance and Policy Related Issues:

COAI made various representations to Members (Finance), DoT and other concerned Senior Officials in DoT the on the following Regulatory Finance related issues:

- a. Reforms in AGR finalization and other measures
- b. Allow deductions of lease line/bandwidth charges and the charges paid by one TSP to the other TSP as Pass through charges
- c. Lower of Accrual and Paid being considered to derive the AGR
- d. Payment of L.F. in Q4 to be delinked from the payment made in Q3
- e. Review of the provisions of penalties levied @ 50%
- f. Realized vs Unrealized Forex
- g. ICR minimum commitment
- h. Levy of SUC on Wireline Revenue
- i. Alignment of the FBG with the LF and SUC payouts of telecom operators

- j. Rejection of Pass through claims related to operators, which have shut down their operations

17. DoT M2M Guidelines:

Based on request from members, COAI submitted a letter on 24.01.2020, requesting following:

- a. Six months extension for implementing the M2M KYC guidelines for all M2M SIMs.
- b. DOT should create a mechanism to allow certain enterprise more than four URLs/IP Addresses for a particular use case. DoT can open a separate cell looking into the demands of the enterprise.
- c. Explore the possibility of making the M2M guidelines issued by DoT on 16.05.2018 applicable only for those M2M connections which were provided after 16.05.2018.

18. Consultation Paper on SAR Limits for RF Devices Used in Close Proximity to Human Body by TEC:

The Consultation Paper was issued by TEC in March 2019 and key points submitted to TEC are as below:

- a. The ICNIRP guidelines have served across the globe for over 20 years. With the imminent revision of these guidelines, the new ICNIRP Guidelines will be a reflection of the scientific consensus based on the new research work published since 1998. This should thus account for new technologies, new frequencies and should address the needs of all members of the global society.
- b. IEC 62209-1 and IEC 62209-2 are good standards and are current as of today. However, a joint working group set up by IEC and IEEE has been working to combine and update the requirements in 62209-1 and 62209-2 as well as the IEEE P1528 into a single document. This work has completed, passed at the first round of vote and is due for the second vote shortly. If successful, this

revised standard will be published in the next few months, this should be adopted when approved.

Subsequently, a Development Coordination Committee (DCC) meeting was held in November 2019 to discuss the draft document (No. TEC/SD/DD/SAR-XXX/01/XXX-19) on Specific Absorption Rate (SAR) Limits for Wireless Communication Devices used in close proximity to human body. Industry provided inputs during the meeting and the document is not finalized yet.

19. 5G:

COAI has been working very closely with the Department of Telecommunication and the 5G High Level Forum of the Government to frame policies for India. COAI also participated in the report on trials for 5G/experimental spectrum. The final recommendations of the committee were as follows:

- a. Trial spectrum for 1 year extendable by another year. Initial 3 months period (before the beginning of 1 year) for logistics.
- b. Trial license to be given per LSA.
- c. E&V bands will be allocated as per the requirement.
- d. All spectrum requirements (access & backhaul) have to be made in one single application and allotment will also be made in one go.
- e. Trial spectrum shall not be used to offer any commercial services.
- f. There will be single window clearance provision.

DoT also announced conduct of 5G trials in 2020, for which 5G Trial Committee sought applications in the proforma for joint application by Telecom Service Providers (TSPs) and Original Equipment Manufacturers (OEMs) to Department of Telecom (DoT) for conducting 5G Trials. Members have submitted 5G trial application to DoT and awaiting revert from DoT regarding commencement of trials.

20. Proposal on Uncovered Villages Program:

Industry assured DoT that the TSPs are committed to collaborate with the Government in taking the Hon'ble Minister, Shri Ravi Shankar Prasad, initiative forward to expedite connectivity to all villages across the country. Industry suggested following key principles:

- a. Distribution of Work and subsidy should be equitable.
- b. Scheme should be for compensation of cost and should not become a profiteering scheme.
- c. It should not create any monopoly.

A joint proposal was submitted to DoT basis these key principles. Some of the points of submission for scheme design are as follows:

- a. Uncovered villages to include only those villages which are not covered by any TSP
- b. No duplication of Infrastructure
- c. Infrastructure sharing amongst TSPs should be mandatory
- d. Technology Selection should be at the discretion of TSPs

21. TRAI Consultation Paper on Cloud Services issued on October 23, 2019:

Highlights of the submission made to TRAI are as follows:

- a. Unlike traditional service providers, CSPs do not fall within the same category of service providers as defined in the Telecom Regulatory Authority of India Act, 1997 (TRAI Act) owing to the fact that CSPs merely use the existing connectivity provided by telecom service providers and do not constitute telecom service providers in itself by themselves. Since CSPs cannot be classified as a telecom service provider under the current definition, the creation of a regulatory framework for CSPs does not fall within the ambit of the Telegraph Act and TRAI Act.

- b. The Indian market has successfully adopted cloud across sectors including banking and finance, telecom, and public sector. At present, there already exists adequate legal and regulatory framework that are applicable to CSPs.
- c. Since CSPs require an enabling environment to provide innovative solutions and services in India, they should not be subjected to any further regulation (in addition to the existing legal frameworks) through an industry body or regulator that may be burdensome or restrict their ability to innovate.
- d. No membership requirements or industry body registration should be made mandatory for CSPs.

TRAI Open House Discussion was held on 28th February 2020 where these submissions were highlighted to the Regulatory Authority and other Associations were also supportive of COAI points.

22. TRAI Consultation Paper on Developing a Unified Numbering Plan for fixed line and mobile services issued on September 20, 2019:

COAI in its response to TRAI made the following submissions:

- a. Unified numbering scheme should only be introduced if there is no alternative method to meet the future ascertained requirement of 4.68 billion mobile numbering resources till 2050.
- b. '0' + STD code be made mandatory for accessing fixed line from mobile/ fixed line and Mobile number to be dialed without '0' from mobile/fixed line. '0' and STD code is already mandatory for accessing inter-SDCA fixed line from fixed line and well as intra-circle and inter-circle fixed line from mobile. The new modification will mandate dialing fixed line with '0' and STD code for intra-SDCA calls also. This also requires mandating mobile numbers without dialing '0'. This solution will make available 7 billion mobile numbering resources to cater to the future need of mobile numbering

series till 2050 and will involve minimal changes at the network, routing and interconnection requirements.

- c. One of the members TSPs (RJIL) propose a different view: The Unified Numbering Plan should be implemented as soon as possible instead of any temporary solutions in the short term. They also mentioned that prefixing of 0 is an idea that has been discussed, deliberated and dropped by TRAI.
- d. The present criterion of allocation of numbers is very stringent and ensures effective utilization of numbers.

23. IF3 (Indian Friends of 3GPP):

COAI being the Market Representation Partner (MRP) of 3GPP from India had been constantly engaging with 3GPP on requirements coming from the Indian market, as COAI members have a sustained business developed using 3GPP technologies and standards. To fulfil these activities, COAI formed the Indian Friends of 3GPP (IF3) to facilitate collective activity to host 3GPP meetings of relevance to India, within India and to do so in a manner that is cost effective, efficient, and which meets with the expectations of the 3GPP community. Further, COAI, in the year 2019-20 along with IF3 hosted one 3GPP meeting SA6#35 in Hyderabad in the month of January 2020. Around 100 delegates from across the globe participated in these meetings. The other meetings namely RAN5#86, SA5#129 and SA2#137 were also scheduled in cities like Hyderabad, Pune and Delhi in the month of February but had to be postponed due to the outbreak of COVID-19.



24. Refund of Additional Custom Duties Imposed on LTE and Related 3G/4G Products:

The notification issued by Department of Revenue on 11th October 2018 enlisted the Long Term Evolution (LTE) products under the HSN 8517 69 90 with 20% custom duty. Pursuant to this notification, Custom had started imposing a Basic Custom Duties of 20% on all the respective products with effect from 12th October 2018. It seems that the aforesaid products were inadvertently captured under the different HSN, and therefore, vide its subsequent notification dated 29th January 2019, Department of Revenue has issued further amendments and reframed description for HSN “8517 62 90 or 8517 69 90”. Basis the amendments issued on 29th January 2019, it is understood that the earlier notification dated 11th October 2018 was intended not for change in classifications of items but for the revision in Basis Custom Duty which was applicable w.e.f. 12th October 2018 whether the items covered under 8517 62 90 or 8517 69 90. Therefore, the BCD applicable on LTE and other products for the period 12th October 2018 to 29th January 2019 was 10% only, however 20% BCD has been charged by the Customs during that period on the respective products considering the ambiguities in the respective notifications.

COAI has requested CBIC to issue necessary instructions to the concerned authorities to refund the additional Basic Custom Duty (BCD) imposed on the importers of respective products during the period 12th October 2018 to 29th January 2019.

25. Simplification for SCOMET Licenses:

COAI had represented to Department of Commerce, Ministry of Commerce and Industry that as per the existing provisions, exports of certain items – categorized as dual-use goods and even items for repair – require SCOMET (Special Chemicals, Organisms, Materials, Equipment and Technologies) licenses from DGFT, Ministry of Commerce. Since Indian manufacturing facilities have direct relationship

only with Global distribution entities and not with end-customers, they are not able to fulfil the prerequisite criteria of possessing End-User Certificate and End-User PO. This results in delay as well as loss of business and production from the Indian Factories. COAI has requested to introduce a General Validation License (GVL) for an Exporter with a broad list of specified countries and specified end-customers to which that Exporter (Indian Manufacturing Facilities) can ship to without prior need of an End-User Certificate and Purchase Order. The GVL holder Exporter could furnish an annual report on the shipment details as required by the DGFT and Ministry of Commerce.



26. Payment of Pending Dues from BSNL and other Public Sector Units (PSUs) towards Telecom Equipment Manufacturers and Infrastructure Providers:

COAI has made representations to Department of Telecommunications as well as Hon'ble Minister of Communications for an intervention to facilitate the earliest release of all pending dues from BSNL, MTNL and other PSUs towards telecom equipment manufacturers and infrastructure providers. The overall dues from these PSUs towards telecom industry ranges around INR 20,000 crores.

27. Promoting Local Telecom Network Equipment Manufacturing & Incentivizing Exports:

COAI is closely coordinating with Department of Telecommunications for Promoting Local Telecom Network Equipment Manufacturing

and Incentivizing Exports. Several global Telecom OEMs including Nokia and Ericsson have set up state-of-the-art manufacturing units in India apart from having their global R&D and service delivery centres employing tens of thousands of people in the country. Indian headquartered telecom manufacturers have also seen good growth and contribution towards job creation and capacity building. However, for Indian telecom manufacturing to exponentially grow it is pertinent that the government focus and support shifts to increasing production volumes, of which exports will be a key engine. There is a cost disadvantage (of 4-6%) in exporting finished goods from India compared to other manufacturing nations across the globe. The Ministry of Electronics & Information Technology (MeitY) has recently announced a Production Linked Incentive Scheme (PLI) for large scale electronics manufacturing industry, which is mainly focused on mobile phones and related components and does not include telecom network equipment. COAI has requested Department of Telecommunications to bring similar Production Linked Incentive Scheme for telecom network equipment manufacturers as well.

28. E-Commerce Related Policies and Guidelines:

Department of Consumer Affairs issued the Draft "E-Commerce Guidelines for consumer protection 2019" for stakeholders' inputs. Apart from the liabilities of both E-commerce players and sellers, Consumer Grievance Redressal Procedure were also part of the draft guidelines. COAI has also submitted its inputs to the Department of Consumer Affairs on these draft guidelines. Major submissions include the followings:

- a. To remove the provisions where an E-commerce entity shall be held guilty of contributory or secondary liability if it makes an assurance vouching for the authenticity of the goods sold on its market place; or if it guarantees that goods are authentic, as it is not consistent with law and seeks to impose liabilities without any clear indication of the nature of activity that would draw such liability.

- b. Instead of e-commerce entity being mandated to disclose terms with the seller, their websites should be required to display the customer facing and governing policies of return, refund, exchange, warranty/guarantee, delivery/shipment, mode of payments, grievance redressal mechanism etc.
- c. To remove the provisions where intermediary, need to exercise “due diligence” over information/goods that are illegal, counterfeit, misleading, paedophilic, defamatory, deceptive or misleading. The e-commerce entity cannot police or adjudicate on IPR related disputes.
- d. To avoid any overlap with Consumer Protection Act, 2019 in the issues to prevent unfair trade practices and protect consumer interests.

29.Operationalization of Indian Counterfeited Device Restriction (ICDR) System:

The system operated and maintained by Mobile Standards Alliance of India (MSAI) to prohibit import of mobile phones with duplicate, fake and non-genuine IMEI, has been replaced by DoT with a new system i.e. Indian Counterfeited Device Restriction System (ICDR) developed by C-DoT. This system has been operationalized on pilot basis w.e.f. January 2020 for registration and generation of IMEI certificates by following due procedure for import of mobile phones in India. Although, the new system is user friendly and also operating at a good speed, however, COAI made a representation to DoT regarding the certain provisions/technical capabilities that need to be ensured to enhance the utility and smooth functioning of the new ICDR system.

30.The Personal Data Protection Bill, 2019:

The Joint Parliamentary Committee (JPC) sought comments from stakeholders on “The Personal Data Protection Bill, 2019”. COAI submitted that there are aspects of the Bill that

not only deviate from the principles laid down by the Hon'ble Supreme Court but also from global standards.

COAI submitted that it will be critical for the draft Bill to resolve the ambiguities in interpretation of what constitutes personal data and sensitive personal data. Anonymized and non-personal data should be completely outside the scope of the Bill and the requirement of registration for Significant Data Fiduciaries should be done away with. COAI highlighted that the Bill should allow Data Fiduciary to determine what reasonable purposes would constitute and that the Bill should adopt an approach which recognizes that age-verification mechanisms can only be implemented through 'all reasonable steps' by data fiduciaries. COAI urged that the data fiduciary should not be held responsible for the accuracy of the data principal's data. COAI also recommended that the nature and scope of the right to be forgotten, including the enforcement measures should be specified in the Bill. COAI supported the formation of Data Protection Authority (DPA) and advocated that the Bill should promote transparency and independence of the DPA by amending provisions related to the selection committee to include a judicial and technical member, composition of DPA etc. COAI emphasised the need to make DPA financially autonomous and recommended that the powers & functions of DPA should include consultation with sectoral regulators so that it can leverage domain expertise. COAI highlighted that Code of practices should emerge from the industry, rather than being prescribed as onerous regulations. COAI recommended that a minimum period of 24 months be made available for applicability of any particular rule/standards/code of practice from the date of its notification. COAI suggested that the Bill be revised to remove the criminal penalties and civil penalties should be applied only in connection with the business carried out in India – not worldwide turnover of the defaulting company. COAI also recommended that a clear and unambiguous exemption of data of foreign nationals is imperative for the large scale off-shore processing industry in India as

this will help to avoid jurisdictional conflicts with authorities in another jurisdiction such as the European Union.

COAI urged the JPC to consider its recommendations in order to ensure that the data protection law works for consumers, businesses and the economy at large.

31. “The proposed formation and rules on Central Consumer Protection Authority (CCPA)” under the Consumer Protection Act 2019:

The Department of Consumer Affairs sought comments from the stakeholders on proposed formation and rules on Central Consumer Protection Authority (**CCPA**) under the Consumer Protection Act 2019 (**The Act**).

COAI highlighted certain discrepancies such as conflict of jurisdiction between parallel adjudicatory bodies, independence of regulators, and other such issues surrounding the formation of CCPA, with respect to the Telecommunications Sector which must be addressed in order to ensure a smooth implementation of the Act. COAI submitted that the telecommunication sector already has a Sector Regulator, TRAI, which is extensively dealing with role and functions assigned to CCPA under the Consumer Protection Act, viz, to protect, promote and enforce the rights of consumers as a class, prevent violation of consumers rights under this Act, to prevent unfair trade practices, ensure no false or misleading advertisements are made etc.

COAI submitted that the role and functions of the Central Authority would overlap into the functions that are already being carried out by TRAI and could create an overlap of jurisdictions and possibly conflicting regulations. The TRAI being a sector specific regulator is also charged with the responsibility of consumer protection and is best placed to carry out these functions. COAI suggested that where more than one regulator exists, governments should develop institutional arrangements that minimise any overlap of responsibilities and avoid duplication

of agencies with similar responsibilities as this can help ensure regulatory consistency, avoid uncertainty, and reduce resource cost for both government and businesses of multiple regulators looking at the same matter.

COAI also recommended that consultation should also take place with various sectoral regulators including TRAI to ensure that there is no overlap or conflict in jurisdictions thus ensuring both certainty in the framework as also optimal use of resources.

32. Refund of accumulated credits / adjustment of excess GST Credit:

The GST, amounting to above Rs. 35,000 Crores, against capital expenditure and Government payments incurred by the telecom industry is stuck as input credit with the Government, which the industry is not able to utilize. This has led to an imbalance, as on one hand, the TSPs' money is blocked as GST input credit and on the other, the operators are making LF, SUC and spectrum deferred payments.

The industry would continue to incur capex for expansion of wireless and wireline broadband services including roll out of 5G which would result in further accumulation of Input Tax Credit.

COAI has requested the Government to facilitate greater utilization of the accumulated GST input tax credit of TSPs as it will be of big relief to the industry. Therefore, once the Government allows the adjustment of unutilized input tax credit against the Government spectrum dues then the same will help to ease the cash flow and drive investments in the Industry.

The payment of GST under reverse charge mechanism on both spectrum payout (auction / liberalization) and LF/SUC related payments in cash is leading to a cascading cash flow impact.

- a. Exempt regulatory levies (LF, SUC, spectrum repayment) from payment of GST under reverse charge mechanism go forward – this would ensure that further accumulation of credit on this account would cease.

- b. Refund should be allowed for accumulated credit to avoid cascading of taxes, which is a fundamental principle of any value added tax prevalent in the VAT regime and in most of the developed international jurisdiction.
- c. Adjustment of the spectrum charges against the blocked GST i.e. utilize the excess GST credit as payment towards the Telecom operator's liability towards spectrum auction and License Fee/SUC

33.Exempt GST on payments to Government, e.g. Spectrum payment, license fees, Spectrum usage charge, Right of Way charges:

- a. Applicability of GST on regulatory levies is leading to tax cascading, since telecom operators are unable to fully utilize input tax credit paid on such regulatory levies. This first involves a cash payment of tax with corresponding credit against output liability. It is revenue neutral for the Government but involves large blocked working capital for the industry, given that a high credit pool that already exists. Given the precarious fiscal state of the industry, the telecom service providers are not in a position to carry this heavy burden of such cash blockage, nor can they bear the avoidable cost of funds for this blockage.
- b. Internationally VAT/GST are not applicable on government services since they are regarded as a non-economic activity or sovereign functions that are outside the ambit of tax. For instance, in the European Union, as per the VAT Directive, bodies governed by public law are not taxable persons in respect of activities/ transactions in which they engage as public authorities.
- c. In line with the international practice, we requested that payment of regulatory levies made by telecom operators should be exempted from tax under GST. Regulatory levies were made liable to indirect tax, effective 1 April 2016 only, prior to which no tax was applied on such payments/charges.

- d. Exemption of telecom regulatory levies from payment of GST would ease overall working capital burden on telecom operators and would also ease cases of accumulated credits. The said activity will also be revenue neutral from the perspective of the Government. GST under reverse charge is payable on all regulatory payments to the Government.

34. GST - Blockage of GST Credit:

Members are facing the issue of blockage of GST credit by tax authorities due to mismatches between GSTR2A and GSTR 3B. This may result in cash pay-out in our next GSTR 3B returns.

The Central Government has issued Notification No. 49/2019-Central Tax, which restricts to avail the ITC (Input Tax Credit) in respect of invoices/debit notes not uploaded by suppliers to 20% and event further brought down to 10% of the eligible credit available in respect of invoices/debit notes uploaded by suppliers which are appearing in GSTR-2A (Online input tax register).

Representation is being made to the Hon'ble Finance Minister as well as to the GST council informing that credit blocking to be withdrawn and the credit should be released for utilization.

Telecom industry is already facing challenge of accumulation of GST credits and in such circumstances, if it starts paying GST in cash due to blockage by tax authorities then it would accentuate the problem of accumulation of credit.



35.Exemption from IGST levied and collected as customs duty on import of ships and vessels into India, on a temporary basis, for supply of services:

For the purpose of supplying a service, there is a need for import of goods, aircrafts, ships and vessels on temporary basis into India. Such instances include import of ships for laying or repairing of undersea cables, import of rigs and ancillary equipment into India for a specified term.

On import of such ships or vessels on temporary basis into India, for supply of services liable to GST, double taxation arises.



- a. GST is levied for the first time, when IGST (as customs duty) is levied on the value of the ships and vessels when imported on temporary basis into India.
- b. Second time, on the supply of cable laying or cable repairing service, IGST leviable at 18%.

Representations were made to the Government requesting the undersea cable system that involve huge capital outlay is generally setup by the consortium of the telecom services providers and suitable notification to be issued for exemption. Notification is being issued by the Ministry of Finance.

36. GST - E-Invoicing from the Portal:

Representation regarding exemption to telecom industry under new E-invoicing system being introduced w.e.f. October 01, 2020.

Telecom industry generates above 20 lakhs taxable B2B invoices in a month. Further, the invoices raised to B2C customers run in crores. Further, other taxable documents like credit notes, debit notes, invoices for intra-company transactions are in addition to the above which are also huge in number.

GST Council in its 39th meeting held on March 14, 2020, has extended exemptions to various industries including Banking, Insurance, Financial Institutions, Goods Transport Agencies, etc. from e-invoicing system.

Representation made to MoF requesting that exemption from e-invoicing system should be provided to TSPs also.

37. Clarity on issue of availability of input tax credit on critical telecom equipment:

COAI had taken up the issue of ongoing enquiries by the MP state tax authorities against various telecom operators about eligibility of input tax credit on the equipment installed on telecommunication towers with a request that due process of law should be followed by the authorities before denying any input tax credit to the telecom operators.

Detailed submission was made with the request that due process of law should be followed by the MP State GST Authorities before denying the input tax credit to the telecom operators on the telecom equipment installed on telecom towers. Such equipment constitutes the very heart and core of any telecom network without which it is not possible to provide telecom services and denial of credit on such equipment would result in grave financial hardship to the telecom operators which will lead to a huge increase in cascading of input taxes, which is not the spirit of GST law.



38. Introduction of a scheme for deposit of monthly advance tax instead of tax deducted at source (TDS) for large companies:

Every year a taxpayer has to incur a lot of cost and efforts for getting the certificates under section 197 of Income Tax Act. Further these are based on estimations only. For obtaining 197 Certificate, online application in Form 13 needs to be filed, however, the window opens on 1st April for filing.

As per Citizen's charter of the Income Tax Department, the application of Nil/Lower Tax should be disposed-off within 1 month. Generally, it takes about 2 months and the deductor applies the full rate of TDS thereby resulting into cash blockage of the taxpayer.

To provide convenience to taxpayers and to reduce costs and efforts of both taxpayers and tax authorities, it is recommended:

The large taxpayers are already subject to scrutiny by tax department. Hence, an amendment should be made in section 211 of the Act wherein large taxpayers should pay monthly instalment of advance tax instead being subject to tax deducted at source.

39. TDS on prepaid distributor margins/ discounts from telecom operators (telcos):

TDS under section 194H on prepaid distributor margins/discounts from telecom operators.

Telcos sell telecom products in form of prepaid vouchers and talk time to its channel partners/distributors at discount. There has been continuous litigation on applicability of TDS on spread between maximum selling price and discounted price at which such products are sold to distributors. Telcos have long been contending that relationship between the telcos and distributors is on "Principal to Principal" and not "Principal to Agent" basis.

There is a strong case for issuance of a clarification that such discounts should not fall within the ambit of TDS provisions. However, if the government still wants to pursue this route for tax collection, it should introduce the TDS rate at 1% instead of the current 5%, which would be closer to the actual tax liability of distributors as margins earned by the distributors are low and they sustain only on volumes.

40. Pre Budget-Recommendations 2020-21:

Detailed representations with regard to key issues related to Direct and Indirect Taxes were sent to the Ministry of Finance, Ministry of Telecom, CII, FICCI, ASSOCHAM, etc.

Summary of key issues included in the representation is as follows:

GST		
Sr. No.	Issue	Recommendation
1.	Exemption from GST on Spectrum payment, license fees, Spectrum usage charge.	Given the huge burden of taxes and regulatory levies on telecom operators and considering the fragile state of their finances, special benefit should be provided to telecom operators in GST by way of exemption on regulatory payments of LF, SUC and spectrum assigned under auction.
2.	Refund of accumulated balance in Input Tax Credit	GST Act may be amended or notification be issued to allow refund of accumulated unutilized input tax credit as significant working capital being blocked under electronic credit ledger This should be refunded immediately to enhance cash flows of the Industry.
3.	Multiplicity of compliance, scrutiny, Audits, Investigations and Litigation for large Pan India service providers	Permit centralized registration and centralized audit procedure for 'PAN India' service providers.
4.	Credit on telecommunication towers and shelters	The exclusion of telecom towers from the definition of 'plant and machinery' in section 17(5) should be removed.
5.	Challenges in raising E-invoicing using portal prescribed by the GST Council	Telecom operators have multiple billing systems and invoices are generated and issued automatically through IT systems. Telecom operators be kept out of the e-invoicing/ authentication of invoices compliances. If it is to be applied for Telecom operators' then atleast 6-8 months be allowed after issue of notification on the process to be followed. GSTN system and the entire Government eco-system should be running smoothly before such a massive change is implemented.
6.	Levy of entertainment tax through online media/internet implies multi fold compliance burden on the telecom service providers.	The scope of entertainment tax by local authorities should be restricted to the physical entry-based entertainment only.

Service Tax

Sr. No.	Issue	Recommendation
1.	Exemption in respect of levy of Service Tax on Right of Way permission granted by the Central Government/State Government and the development authorities	Scope of Exemption Notification No 1/2018 – Service Tax dated 30 th November 2018 be extended to cover similar services by the Central/State Government Department and the other Development authority.

Direct Tax

Sr. No.	Issue	Recommendation
1.	Section 211 - Introduction of a scheme for deposit of monthly advance tax in case of large companies.	It is recommended that an amendment should be made in section 211 of the Act wherein large tax payers should pay monthly instalment of advance tax instead being subject to tax deducted at source.
2.	Section 115JAA - Removing limitation on time period of utilization of MAT credit	Limitation of 15 years period should be removed to provide respite to companies to utilize their accumulated MAT credit.
3.	Section 10(38)/ 115JB - Level playing on MAT on sale of listed equity shares	MAT rate on LTCG on listed equity shares may be lowered to a rate not exceeding 10%, being the maximum rate of tax on long term capital gains on STT-paid equity shares under regular provisions.
4.	Section 72A - Amendment in conditions of amalgamating companies	It is recommended to bring down the threshold of keeping 75% of book value of fixed assets to 25% for maximum 2 to 3 years' time period. The relaxation of this condition would also facilitate conducive environment supporting digital India initiative of Government.
5.	Section 197 – Certificate for deduction at lower rate	Amendment to rule 28AA to provide that AO will not consider tax liabilities which have either been stayed by AO/ appellate forums or for which adequate security is provided by the tax payer, for the purpose of processing LDC application.
6.	Interest expenditure incurred towards 'right to use spectrum', is allowable as revenue	An appropriate clarification should be issued to provide that the interest expenditure incurred towards 'right to use spectrum', is allowable as revenue u/s 36(1)(iii) read with Section 37(1).
7.	Section 79 - condition of change in shareholding	Clarification regarding testing of condition of change in shareholding at the immediate shareholder or the change of beneficial shareholding



Legal Updates: 2019-2020

1. COAI Petition challenging Maharashtra Tower Policy - Bombay High Court

Background:

A petition was filed challenging the regulations dated March 4, 2014 issued by Maharashtra Government for setting up of Cell phone towers in the State of Maharashtra.

Key Takeaway/s:

On April 08, 2019, COAI application seeking amendment of Petition for placing on record the RoW Rules, 2016 and Maharashtra Infrastructure Policy, 2018 was filed. On **July 10, 2019**, the Hon'ble Court extended the interim stay granted in 2014 and also allowed the amendment of the Petition sought by COAI.

2. COAI Appeal Challenging TRAI Direction on Wangiri Calls – TDSAT

Background:

COAI had filed an appeal challenging the TRAI direction dated September 07, 2012 on missed calls (Wangiri calls) originating from outside the country. TRAI vide its said direction asked all the service providers to inter alia ensure that no ISD

facility is activated without the explicit consent of the subscriber. On November 2, 2012, the appeal was allowed as per the judgment of the Hon'ble Chairman of TDSAT. However, the Hon'ble Member pronounced a dissenting judgment on November 08, 2012.

Key Takeaway/s:

The industry had proactively taken steps to resolve the issue involved in the matter. COAI submitted to TRAI that the market of ISD calling and the consumer behaviour has undergone a tremendous change in the recent years and submitted a new proposal to TRAI and highlighted that the same will be more effective in addressing the relevant issue of Wangiri in comparison to the provision of ISD service only by explicit consent.

On **April 22, 2019**, TRAI issued a direction which noted the submissions and proposals made by COAI and withdrew its earlier direction dated September 07, 2012 (the impugned direction) which mandated that no ISD facility can be activated on pre-paid sim without the explicit consent of the subscriber. On **April 30, 2019**, Hon'ble TDSAT disposed of the Appeal as withdrawn in view of this Direction.

3. COAI Petition challenging Penalty for exceeding the EMF limits on shared sites (New Circular dated March 29, 2019 - 20 Lakhs) – TDSAT

Background:

COAI filed a Petition challenging the DoT Circular dated March 29, 2019 on EMF Penalty on Sharing Sites which lists out three scenarios for levy of penalty @20 Lakhs for non - compliance of EMF radiation norms. This circular penalized compliant BTSs in two scenarios despite the TDSAT judgment dated November 15, 2018 which has held that no innocent operators should be penalised in the name of collective responsibility. The petition sought setting aside of penalty amount of Rs. 20 Lacs and implementation of the TDSAT's judgment

Key Takeway/s:

On **August 13, 2019**, Hon'ble TDSAT granted interim relief in the matter and directed DoT not to take any coercive steps for realization of its demands raised under penalty scheme dated March 29, 2019.

4. COAI Appeal in MCD Tower Matter – Delhi High Court

Background:

COAI, AUSPI and MTNL had filed a writ challenging MCD orders and praying inter alia quashing of MCD Office order dated November 20, 2003, Circular dated February 07, 2008 and office order dated April 08, 2010 as these impugned office Orders and the impugned terms and conditions are lacking in competence, ultra vires the DMC Act, unfair, unjust, unreasonable, arbitrary, without power and jurisdiction, unconstitutional and are violative of Petitioners' rights under Article 14, 19(1) (g) and 21 of the Constitution of India.

On January 30, 2017, a mediation settlement agreement with MCD was signed by Aircel, Airtel, Idea, Vodafone, RJio, Indus, ATC Viom, GTL Infra and Tower Vision.

Key Takeway/s:

On November 20, 2019, it was highlighted to the Hon'ble Court that there is an account reconciliation clause in settlement agreement dated January 30, 2017 and it was submitted that MCD is not reconciling the accounts with concerned TSPs/IP1s, and is sealing towers on regular basis. Hon'ble Court directed MCDs to reconcile accounts with TSPs/IP1s before the next date of hearing.

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**Make in India
Program**

tsdsi
India's Telecom SDO

**TSDSI - Standards
and Thought
Leadership**

**International
Telecom Buyers
meet**



mHealth





7562

CXOs



319

Exhibitors



264

Startups



327

Speakers



53

Conference Sessions



800

Media Persons

Bigger than

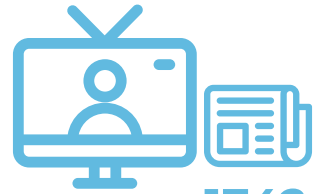
MWC Los Angeles

The Knowledge Hub

Highest Media
Visibility

2515

Media Coverage



1742



60,000 sqm

Total Area



5G

56 use cases

Live Demos

Footfall

75,278



Key Highlights



Stats
@exploreIMC



1.4 Billion
impressions



30 Thousand
Contributors



520 Million
Reach

Inauguration

Inaugurated by

Shri Ravi Shankar Prasad

Minister of Telecommunications, Electronics & Information Technology,
Law & Justice, Government of India and attended by industry leaders, media,
analysts, academia, scientists and young professionals.



BK Das

Distinguished Scientist
ISRO

Nunzio Mirtillo

Sr. Vice President &
Head of Market Area
South East Asia,
Oceania & India
Ericsson

Jim Whitehurst

President and CEO
Red Hat

Arun Kumar

Chairman & CEO
KPMG India

JAY CHEN

CEO
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Vikas Agarwal
General Manager
OnePlus India



Vijay Shekhar Sharma
Founder and CEO
Paytm



Kunal Bahl
CEO
Snapdeal



Manu Kumar Jain
VP, Xiaomi and Managing Director,
Xiaomi India

Hari Om Rai
Co-founder and Chairman & MD
Lava International Limited



Leadership/CEOs Conclave
Indias Future Int elligent,
Immersive or Inventive?



Leadership/CEOs Conclave Imagine the Connected Future Technology redefining Connectivity



Leadership/CEOs Conclave - From Connectivity to Content



CIOs Conclave Transformational CIOs (Panel Discussion)



5G Live Use Cases & Announcements / Product Launches

56 live 5G use-cases, announcements & product launches took place at IMC 2019. Some featured announcements & showcases:

Ericsson and Qualcomm conducted the demo using a smartphone based on Snapdragon 855 Mobile Platform with Snapdragon X50 5G Modem-RF System and Ericsson's 5G platform including 5G NR radio, RAN Compute products and 5G Evolved Packet Core.

Ericsson and Qualcomm demonstrated India's first 4K video streaming, video calling and 5G cloud-based gaming using the 5G commercial system in both sub-6 GHz and mmWave using 5G commercial devices, set up by Ericsson.

Cloud Based Immersive Gaming, Smart Factory & Remote Healthcare by **Bharti Airtel**

Qualcomm successfully completed first ever Live 5G video call in India on mmWave spectrum in collaboration with Ericsson

NavIC - Qualcomm in collaboration with Indian Space Research Organization (ISRO) announced support for India's Regional Navigation Satellite System (IRNSS), Navigation with Indian Constellation (NavIC), in select chipset platforms across the company's upcoming portfolio

OnePlus collaborated with Qualcomm Technologies Inc. and Ericsson to showcase the power of the much anticipated 5G technology

Redhat showcased Open Hybrid Cloud, Edge Computing, OpenStack Platform & Distributed Compute Nodes (DCN) in Virtualized RAN (vRAN).

HFCL showcased IO Networks Made In India Wireless Connectivity Solution to Facilitate Stronger Wi-Fi Networks

STL showcases Stellar Fiber Industry's First Universal Fibre, Mantra Pods fully integrated solutions for smarter networks, 5G Edge Mantra Data Center Solution for 5G and Lead 360 V2.0 Second Generation Hyperscale Network Modernization Solution

Alibaba - Whale Cloud launched the 5G Operation Map for India to support operators in different stages of the 5G network deployment. The map contains four key capabilities required for successful 5G monetization: center of intelligence to provide advanced data analytics and AI technology; Center of Operation focuses on comprehensive 5G network management; Center of Ecology builds a digital ecosystem for various industrial customers; Center of Value maximizes the value of ecosystem partners online and offline channels and customers

Reliance Jio & Samsung together presented modern traffic security systems with intelligent camera reading solutions for real-time monitoring. Jio also launched AI-based video call assistant with Radisys.

Huawei announced AI for the Smart City 2.0 and 5G + AI Smart City in addition to Future airports using 5G+AI technologies and Artificial Intelligence (AI) based Massive MIMO optimization technology.

Mavenir and Vodafone Idea have extended their partnership related to Telco's Network-As-A-Platform that reaches distributed presence across all major industrial, commercial and services clusters in India. Vodafone Idea in partnership with Nokia to roll out software-defined networking in a wide area network (SD-WAN) services for start-ups and enterprises.

VVDN showcased Vermeo Card - Dual FPGA solution architecture for Telco Application and also presented fronthaul with ORAN over eCPRI (7-2 splitup option) - 5G fronthaul termination solution based on Xilinx FPGA.

Xilinx also showcased the industry's first adaptable compute, network and storage accelerator card built for any server or cloud

Honor announced the HONOR Vision Smart Screen that is positioned as the future of television, HONOR Vision features intelligent display, AI Camera and a flagship level WiFi Chipset.

Media Advocacy Stakeholder Outreach Desk

Significant activities wherein COAI achieved widespread media advocacy

COVID-19

As the world is battling COVID-19, COAI led conversations around key issues and recommendations on behalf of the Telecom sector since the start of the pandemic and the subsequent lockdown. COAI played a decisive role towards steering communication on behalf of the telcos - presenting an industry consensus view to the Government on crucial issues like network collaboration amongst telcos during COVID-19 requirement for Work From Home issues like slower data speed, data consumption, need for robust telecom infrastructure, spectrum and bandwidth issues and the need for additional spectrum, curfew passes, tower maintenance, backend support among others.

Media Outreach: Media was updated with the latest developments via statements, responses to the queries which resulted in huge coverage across the country and in International media.

COAI's opinion along with the initiatives by telecom companies were captured in national and international media like *The Economic Times*, *Hindustan times*, *Business Standard*, *Dainik Jagran*, *Dainik Bhaskar*, *Radio France*, *ITV London*, *China Global Television Network among others*. Social media communication was also done parallelly ensuing the all the platforms are sharing relevant information.

COAI urges subscribers to use data networks responsibly to free up infra for critical services

NEW DELHI: With the government imposing 21-day lockdown to tackle coronavirus spread, industry body COAI on Wednesday urged mobile consumers to use data networks responsibly, so that critical services can run smoothly on communications infrastructure.

COAI's appeal to public comes at a time when data usage has surged nearly 30 per cent over the last few days in the wake of lockdowns, work-from-home and social distancing measures adopted to contain the spread of coronavirus.

PM Narendra Modi on Tuesday announced a complete lockdown for 21 days in an unprecedented move to halt the spread of the pandemic.

Soon after the announcement, the Centre said all road,

rail and air services will remain suspended during this period.

COVID-19 has claimed 9 lives in the country and over 550 persons being affected by the viral infection. Fears are also mounting that more could be hit as the global coronavirus toll inches towards 17,000.

"We are asking people for responsible usage of network...to avoid any trivial use of internet and networks...so that remote working, online education, digital healthcare, payments and other critical services, can run smoothly and uninterrupted," Cellular Operators' Association of India (COAI) Director General, Rajan Mathews said.

Mobile users can also do their bit by choosing to time their some of their online activities during off-peak hours, say early morning or late evening,



he said.

Mathews said there has been a 20-30 per cent increase in data demand just in the last few days, as states and Union Territories imposed lockdowns, and took measures to encourage social distancing and Work From Home to check

the spread of coronavirus.

It is pertinent to mention here that video streaming platforms like Netflix and social networking giant Facebook are reducing bit rates for videos on their platforms as part of their efforts to help mitigate mobile and broadband net-

Ask OTT players to ease network load: COAI to govt

MEGHA MANCHANDA
New Delhi, 22 March

The Cellular Operators Association of India (COAI) has asked the Centre to instruct the over-the-top (OTT) players like Netflix, Amazon Prime Video and Zee5 to ease the pressure on network infrastructure that has arisen from the increased demand for online video streaming.

Demand has surged because of the coronavirus lockdown, more people working from home, more digital payments, more healthcare and education services moving online, and quarantine measures to contain the spread of Covid-19.

"Due to lockdown/quarantine measures in various parts of the country, a sudden surge in demand for online video streaming is also expected to rise substantially," the COAI has said in a letter to the Telecom Department secretary.

The COAI has also cautioned the streaming platforms themselves about the surge in digital use straining the network infrastructure of telecom operators. It has urged companies to take urgent steps. One is temporarily switching from high definition to standard definition streaming. Another is removing advertisements and pop ups that consume high bandwidth and replacing them with public announcements on awareness about the coronavirus.

At this crucial time, COAI said it is absolutely essential for the streaming platforms to cooperate with telecom providers so as to manage the traffic distribution patterns that are likely to strain the network infrastructure 'at a time when it is needed for various critical requirements'.

Citing the 'unprecedented situation' caused by the outbreak of the coronavirus, the COAI noted that governments around the world are imposing stringent measures to reduce social interaction to contain the spread of the pandemic.

"In the past few days, in India too, advisories have been issued by various



government agencies including social distancing, restrictions in terms of workplace, also encouraging Work From Home (WFH), online/digital education, digital payments/transactions, online healthcare, wherever possible and other critical requirements to be met through digital means. This sudden surge in digital use is already putting pressure on the network infrastructure of the Telecom Service Providers (TSPs)," said the COAI.

The association has written to a dozen streaming platforms including Amazon Prime Video, YouTube, Hotstar, Zee5, Alt Balaji, Voot, Sony Liv, Viuclip, Hoichoi, Netflix, SunNXT and Voot seeking their 'cooperation for joint action to facilitate smooth functioning of data communications services in this critical period'.

"We understand that there are various measures that the streaming platform companies can undertake in this present situation to continue to provide a suitable level of service to their customers at the most appropriate bitrate required...," the COAI said in its communication to streaming platforms.

The COAI mentioned how OTT players in other countries were reacting. "We understand that similar measures are being taken by various streaming platforms internationally like in the US and Europe as more and more countries enter lockdown to combat the spread of the virus," it said.

work congestion.

Netflix said it will reduce traffic on telecommunications networks by 25 per cent while maintaining the quality of service for users in India.

Facebook said it will temporarily reduce bit rates for videos on its platform and Instagram in India.

Companies like Amazon Prime Video are also temporarily lowering bit rates - a measure of how much data is being transferred - to ease pressure on telecom network infrastructure.

The move by these firms came after COAI wrote to the government urging issuance of instructions to streaming platforms to initiate measures that will ease the burden on network infrastructure, which is needed for "critical" functions at this juncture.

AGENCIES

UNION BUDGET

Telecom industry body, COAI, lauded the government for a progressive and forward looking budget and commitment towards India becoming a \$5 trillion economy.

The Budget 2020-21, that includes enabling an aspirational India, through major fundamental structural reforms targeted at fostering healthcare, education, skill development and ensuring economic development for all. The Hon'ble Finance Minister Smt. Nirmala Sitharaman emphasized on country's growth and Digital inclusion will hinge on advanced technologies such as AI, Robotics, Machine Learning, Analytics, among others, which essentially relies on telecom infrastructure.

The Budget proposed that the New India will be driven by innovations, AI and computing where data will be the new oil and other significant initiatives such as linking of 1 lakh gram panchayat to the Bharat Net program by this year and an allocation of INR 6,000 crore in this regard.

Media Outreach- COAI's statement was covered in major publications like PTI, IANS, The Economic Times, The Financial Express, among others.

Telecom Sector Dials Its Wishlist

As the BJP-led government prepares to present the first Budget in its second term, India's telecom sector is looking for measures aimed at addressing the key issues troubling the industry. At the same time, the beleaguered industry wants clarity on a number of taxation issues, including its demand that goods and services tax (GST) be lowered to 12% from 18%. Here is a look at some of the sector's main demands:

- Telecoms want clarity on discounts, and that the sector be removed from the ambit of TDS
- MAT rate be reduced to 10% from 18.5%, in line with the reduction in corporate tax rate
- Definition of the term 'royalty' under the provisions of the Act be amended with retrospective effect to exclude standard telecom services, interconnect services and roaming services
- Telecom equipment be exempted from the levy of basic customs duty
- Exemption from IGST for hassle-free import of vessels used for repairing undersea cables
- Exemption from payment of GST on transactions undertaken among different GST registrars of the same legal entity
- Input tax credit on telecom towers and shelters be specifically allowed, and provisions be modified to remove ambiguity regarding eligibility for availing it

Clarity that GST would not be applicable on licence fee, spectrum acquisition fee and spectrum usage charge

Allow reversal of input tax credit on removal/loss/destruction of capital goods after being used

Reverse input tax credit with interest on account of non-payment to suppliers within 180 days from the invoice date

TAXES

WISHLIST BUDGET 2020-21

Telecom Sector Demands Tax Rationalisation, Line of Credit

A lower USOF charge of 3%, reduction in licence fee from 3% to 1% and review of adjusted gross revenue definition also sought by the industry

Muneeb Abbas (Times of India)

New Delhi: The telecom sector Monday sought a slew of measures including protection in lower interest rates, banks funding at lower interest rates, application of Centre's strategic intervention is required to revive the stressed industry in line with the National Digital Communications Policy 2018.

"We have met the industry as a part of the pre-budget meeting and they have raised issues such as reduction in license fee, USOF charges, and allowing a line of credit," a Department of Telecommunications (DoT) official said, adding that not to be named.

The industry also urged the DoT to review the definition of adjusted gross revenue (AGR) and removal of goods and service tax (GST) from license fee, spectrum usage charge, and payment on spectrum acquired in an auction, officials said.

"We will examine and have added them towards the demand for line of credit ahead. DoT will process and send their demands to Finance Ministry later this week," the top official added.

The DoT was given 15th till Monday to give a decision regarding the industry's demands to the Finance Ministry for consideration in the upcoming Budget on February 1.

A telecom industry executive added that the industry has been demanding steps that would help ease the new telecom policy (NTP) from year 2019 onwards.

The industry, which has so far invested ₹14.4 lakh crore in the last two decades, is weighed by multiple taxes and levies and operators with the lowest average revenue per user (ARPU) revenue worldwide. Industry says it pays 2% to the government for every 100 rupees, making it among the most taxed in the world.

Outdoor Operators Association of India (COAI) has demanded formation of a working group with members from the department, regulator, and industry stakeholders to prepare guidelines for adopting the principle of input tax credit.

"A larger strategy for the telecom sector to generate funds from domestic sources at affordable rates," the industry advisory noted, and added that the policy remains the importance of continued improvement in the regulatory framework to attract new investments.

The officials said the industry representatives have also demanded that funds should be created to buy locally made equipment.

The industry has also asked the DoT to limit a new interest rate on line of credit so that it could be easier for players to receive equipment.

There is a structure of infrastructure rates to procure Made in India equipment, and we were not able to sell to them," Telecom Equipment Promotion Council (TEPC) chairman Manoj Kumar said. He added that the government should arrange for a line of credit for such applications.

Besides COAI and TEPC, the Telecom Towers and Infrastructure Providers Association (TIPAs) and Telecom Equipment Manufacturers Association (TEMA) met to discuss the department to press their demands ahead of Union Budget 2020-21.

Telecom firms want cut in rates, levies

DoT holds meeting with stakeholders

SPECIAL CORRESPONDENT
NEW DELHI

Ahead of the Budget 2020-21, the telecom industry on Monday asked the government to facilitate funding for firms at a lower rate of interest, while also pushing for reduction in various levies and taxes to help the debt-ridden sector.

The demands were discussed at a meeting between the Department of Telecom and industry stakeholders on Monday. "We have heard their [industry's] demands and have given time to send in written recommendations till Tuesday. We will then review and forward them to the Finance Ministry for consideration in the upcoming Budget," a senior DoT official said after the meeting that lasted for about one-and-a-half hours.

The pre-Budget meeting was chaired by Telecom Secretary Anshu Prakash and attended by representatives of Bharti Airtel, Vodafone Idea and Reliance Jio, besides industry associations such as Cellular Operators Association of India and Tower and Infrastructure Providers Association.

Other industry representative added that the government had been requested to set up a working group with stakeholders from the DoT, regulator TRAI and industry that will work on preparing guidelines for adopting the principle of input line credit. The industry also pitched that telecom towers be included in the definition of plant and machinery for input tax credit.



Telecom industry rues absence of relief on levies and taxes for stressed sector

NEW DELHI: The telecom industry on Saturday expressed disappointment at the Budget not spelling out any relief in levies and taxes for the "severely-stressed" sector saddled with Rs 1.17 lakh crore in unpaid statutory dues, and rued that it did not receive significant support despite being backbone of the country's economy.

The telecom industry had been pinning its hopes on the Union Budget to offer some breather on licence fee and spectrum usage levies, given that it has to cough up billions of dollars in adjusted gross revenue (AGR) dues to the government.

"None of our key recommendations appear to have been taken into consideration. It is also disappointing to note that telecom was not given an infrastructure status even though a slew of crucial reforms has been announced on infrastructure. The telecom sector, which is the backbone of the country's economy, did not receive significant support," Cellular Operators Association of India (COAI) Director General Rajan Mathews said in a statement.

COAI had been battling for reduction in these levies —

Govt estimate
Rs 1.33 lakh cr revenue from telecom sector in 2020-21

licence fee to 3 per cent from 8 per cent at present and SUC to a flat 1 per cent from average of about 5 per cent. At present, the licence fee of 8 per cent includes a USO fund component of 5 per cent.

Industry experts had estimated that a 6 per cent reduction in licence fee or spectrum usage charges (SUC) could free up Rs 8,000 crore for the industry, which could be infused into network expansion and technological advancements.

"...it is disappointing that there were no announcements made regarding the rationalisation of levies and taxes currently imposed on the severely distressed telecom sector and telecom infrastructure is not taken into consideration that is going to build out the country," he said. Mathews, however, noted that the Budget has laid major emphasis on boosting domestic manufacturing of network products, mobile phones, electronic equipment, semiconductors and healthcare products, and Rs 27,300 crore has been allocated for development of industry and commerce by 2021.

The Budget proposed that the New India will be driven by innovations, artificial intelligence and computing where data will be the new oil, and outlined other significant initiatives such as linking of 1 lakh gram panchayat to the Bharat Net program by this year at an outlay of Rs 6,000 crore.

"A financially healthy and robust telecom sector is imperative to support all these future forward initiatives," Mathews said.

While relief measures continued to elude the industry, the government has more than doubled its revenue estimate from the debt-ridden telecom sector to Rs 1.33 lakh crore in fiscal year 2020-21, mainly on account of levies derived from AGR. In the receipt budget, the government has pegged revenue collection at Rs 1.33,227.2 crore for financial year 2020-21 under communications head. 71

COAI
@ConnectCOAI

"The Budget announcements are largely in line with the government's aim to make India #5G-ready by 2020. The sector has the potential to contribute as much as 12% to GDP, becoming a facilitator for economic #growth" - Mr. Rajan S Mathews @FinancialXpress

Budget 2019 is a step towards making India 5G-ready by 2020. Budget 2019 India: An aspirational Budget, but without relief for a key component industry.
@FinancialExpress.com

12:00 PM - Jul 6, 2019 - Twitter Web App

Financial Health of the Telecom Sector – Post Budget Views

COAI has been championing for the much-needed financial relief and impetus to the telecom industry in its post-budget review, given the importance of the sector in driving inclusive growth in India.

Issues pertaining to the telecom infrastructure, regulatory levies and taxes, appeared in leading financial newspapers including *The Economic Times*, *Business Standard*, *Mint*, additionally, leading online news portals such as *ETTelecom.com*, *ETCIO*, *The New Indian Express*, etc. carried the messaging.

The saga of fine on telcos grinds on

Trail likely to take decision on ₹3,050-crore fine on Airtel, Vodafone after DCC meeting

THREE YEARS AND COUNTING

- JUN 2016:** Failing to procure point of interconnect (POI), Jio writes to the 3 incumbent telcos, making a firm demand for POI within a deadline.
- SEP 2016:** DoT says the matter falls in the jurisdiction of Trai.
- SEP 2016:** Trai sends show cause notices to three telcos regarding service quality deficiencies.
- OCT 2016:** Trai imposes penalty on them to the tune of ₹50 per crore.
- APR 2017:** DoT refers the penalty recommendation for reconsideration to Trai.
- MAY 2017:** Trai sticks to its position.
- NOV 2017:** A 7-member committee gives a report in which it recommends the TSAT, and not Trai, has jurisdiction on penalty.
- JUN 2018:** DCC approves imposition of penalty, but refers back quantum again for reconsideration by Trai.
- JUNE 2019:** Trai sticks to its earlier stand.

COAI @ConnectCOAI

A fine of ₹3,050 crore would be an additional burden on the financially stricken #telecom industry. If DCC accepts the fine recommended by @TRAI, it would add cost of prolonged litigation to telecom's burden. @VodaIdea_NEWS @Airtel_Presence @reliancejio

Let telecom bygones be bygones, DCC - ET Telecom Both sides played rough in the telecom war #telecom.economicstimes.indiatimes.com

10:48 AM · Jul 12, 2019 · Twitter Web App

Telecom lobby seeks tax-free bonds, access to cheaper debt

Repealing customs duty on 4G/5G network products among sops telcos have asked govt

Telecom lobby seeks tax-free bonds, access to cheaper debt

Repealing customs duty on 4G/5G network products among sops telcos have asked govt

The Cellular Operators Association of India (COAI) has sought incentives such as an option to issue tax-free bonds as well as creation of a separate financing body that would provide cheaper loans to telecom operators as they battle shrinking revenue streams in the midst of a stiff war in the sector.

The telecom industry lobby group has also sought access to long-term, low-cost debt for infrastructure projects to be provided by infrastructure debt funds (IDFs), according to presentation made by COAI to the department of telecommunications ahead of the budget that will be presented on Friday.

Airtel has seen a copy of the presentation.

Infrastructure debt funds are investment vehicles which can be sponsored by commercial banks and non-banking financial companies (NBFCs) in India in which domestic offshore institutional investors such as insurance and pension funds can invest through units and bonds issued by the infrastructure debt funds.

These funds essentially act as vehicles for refinancing existing debt of infrastructure companies.

India's telecom sector has seen intense disruption following the entry of Reliance Jio Infocomm Ltd in September 2016 which brought down data tariffs to rock-bottom and made voice calls free.

Operators which were forced to slash these tariffs either shut shop or were acquired by bigger players.

Only two private operators Bharti Airtel Ltd and Vodafone Idea Ltd are competing with Reliance Jio.

Airtel's India wireless business posted a loss of ₹1,377.8 crore in the March quarter, almost triple the ₹482.2 crore loss it posted in the year-ago period.

Vodafone Idea, which is India's largest telecom operator by subscribers, posted a loss of ₹4,881.9 crore in the March quarter and its net debt stands at ₹1.18 trillion.

Jio, the telecom unit of Reliance Industries Ltd, posted a net profit of ₹541 crore in the March quarter.

Both Airtel and Vodafone Idea are under heavy debt and incurring losses though Jio has been profitable for five quarters.

The industry body has accumulated capitalized input tax of about ₹35,000 crore. This should be refunded immediately to enhance cash flows of the industry," COAI said in the presentation.

The industry body has also lobbied for allowing customs duty on the 4G/5G related network products such as soft switches and voice over internet protocol (VoIP) equipment, etc. till such time as quality providers at competitive prices are available in the country.

Mobile Network Boosters

Wireless Monitoring Organisation, field unit of WPC Wing and Telecom operators have been raising awareness regarding mobile signal repeaters. These repeaters lead to increased incidences of call drops and lower data speeds thus degrading service experience for the majority of customers in the area. The objective was to take down illegal mobile signal repeaters installed by individuals. With the raids conducted in Delhi, 32 illegal repeaters were removed and 42 notices were given to remove the identified ones with immediate effect. Heavy fines may be imposed on owners of several premises and notices were served to the rest.

Raids were conducted by DoT teams with the support of relevant authorities and mobile operators. These raids were conducted in several locations across Delhi, Mumbai, Gujarat, and Hyderabad among others.

Media outreach-Coverage was garnered in *The Financial Express*, *Indian Express*, *Hindustan*, *Lokmat*, *The Hindu*, *ET Telecom*, *Communication Today*, *tele.net* etc.

ई-कॉमर्स वेबसाइटों पर मोबाइल सिग्नल बूस्टर की बिक्री पर लगे रोक

● [आर्य नई दिल्ली]

दूरसंचार उद्योग से जुड़ी कंपनियों के संगठन सीओआई ने प्रतिबंध के बावजूद कई ई-कॉमर्स वेबसाइटों पर मोबाइल सिग्नल बूस्टर और रिपीटर की खुलेआम बिक्री को रोकने के लिए दूरसंचार विभाग से हस्तक्षेप का आग्रह किया है।



● मोबाइल सेवा देने वाली कंपनियों के संगठन सीओआई ने प्रतिबंध के बावजूद कई ई-कॉमर्स वेबसाइटों पर मोबाइल सिग्नल बूस्टर और रिपीटर की खुलेआम बिक्री को रोकने के लिए दूरसंचार विभाग से हस्तक्षेप का आग्रह किया है।

संगठन के मुताबिक उसकी अपील के बाद कुछ वेबसाइट ने ऐसे सामानों को अपने ऑनलाइन प्लेटफॉर्म से हटा दिया है, लेकिन कुछ अब भी उनसे बिक्री कर रहे हैं।

● ACTION AFTER APPEAL FAILED

COAI approaches DoT to stop online sale of signal boosters

The mobile operators association has mentioned Amazon's stance on the matter in particular



PRESS TRUST OF INDIA New Delhi, May 22

AFTER MAKING A direct appeal to e-tailers, industry body COAI has now sought telecom department's intervention to stop the rampant sale of mobile signal boosters and repeaters on certain e-commerce sites despite restrictions.

also hampers service quality for subscribers. After its 'cease and desist' appeal to e-tailers to stop the sale of signal boosters, COAI has now sought telecom department's intervention to stop the rampant sale of mobile signal boosters and repeaters on certain e-commerce sites despite restrictions.

an online sale of wireless sets and equipment. In particular, COAI has mentioned Amazon's stance on the matter - that the extent of complying with laws in this regard rests with sellers.

COAI has further asked DoT's WPC wing to firmly put an record in its position of IoT that in case of such sale, the responsibility lies not only with sellers and beyond but also with the e-commerce site which acts as the platform/intermediary. COAI noted that Amazon replied to its saying they have responded to WPC on the issue. Upon contacted, an Amazon spokesperson said, "Amazon operates an online marketplace in India. Sellers selling their products through the Amazon marketplace are solely responsible for all necessary product compliance and are required to sell products which are fully allowed to be sold in India."

The spokesperson added, "wherever concerns about the latest products get raised, we review the case with the sellers."

Further, the impact of repeaters is under restricted category whereas they are required to obtain a licence from WPC wing and it appears that these repeaters are being imported in contravention to the specified norms by ineligible person/companies," it added.

DoT cracks down on illegal signal boosters

FE BUREAU New Delhi, June 12

THE DEPARTMENT OF Telecommunications (DoT) has cracked down on illegal signal boosters installed by individuals by raiding various localities in Delhi and NCR. As per industry body COAI, teams from wireless monitoring organisation, DoT, with support of relevant authorities and mobile operators conducted raids on several locations to take down illegal mobile signal repeaters.

These locations included both residential and commercial establishments in various localities of Delhi like Laxmi Nagar, Paharganj, Greater Kailash, Patel Nagar, South Extension, Chandni Chowk, Rohini, Lajpat Nagar, Rajouri Garden etc. Raids were also conducted in Gurugram and Noida as well as in Karol Bagh, where such illegal equipment was being sold.

"With this exercise in Delhi, 32 illegal repeaters were removed and 46 notices were given to remove the identified ones with immediate effect. Heavy fines may be imposed on owners of several premises and notices were served to the rest," COAI said.

COAI seeks to stop sale of mobile signal boosters online

NEW DELHI

After making a direct appeal to e-tailers, industry body COAI has now sought Telecom Department's intervention to stop the rampant sale of mobile signal boosters and repeaters on certain e-commerce sites despite restrictions. Mobile operators' association COAI has approached the Department of Telecom (DoT) saying sale of such illegal items not only violates norms but also hampers service quality for subscribers.

After its 'cease and desist' appeal to e-tailers to stop the sale of telecom signal boost-

ers met with partial success, Cellular Operators' Association of India (COAI) has informed DoT that while a few e-commerce companies have removed the items, "some are still selling it". COAI said it had previously pointed out to e-commerce companies the Wireless Planning and Coordination (WPC) Wing's directive of May 2016 on online sale of wireless sets and equipment.

In particular, COAI has mentioned Amazon's stance on the matter - that the onus of complying with laws in this regard rests with sellers. COAI has further asked DoT's WPC wing to

firmly put on record its past position of 2016 that in event of such sale, the responsibility lies not only with sellers and buyers but also with the e-commerce site which acts as the platform/intermediary. COAI noted that Amazon replied to it saying they have responded to WPC on the issue.

In its letter to DoT, COAI said, "We therefore request DoT/WPC to kindly intervene in the matter and take up the issue of ban of sale of these illegal repeaters and boosters on the e-commerce websites/platforms with these e-commerce companies."

Crackdown on illegal mobile signal boosters

DoT conducts raids at 15 locations in city

SREEDEV KRISHNAKUMAR MUMBAI

Illegal mobile signal repeaters were taken down in raids conducted by the Wireless Monitoring Organisation of the Department of Telecom (DoT) across 15 locations in the city on Friday. Teams from Bharti Airtel, Reliance Jio, and Vodafone-Idea assisted with the raid.

Residential and commercial establishments in Thane, Dadar, Zaveri Bazaar, Vile Parle (East), MG Road, Dalal Street, Grant Road, Dondat Street, J.B. Nagar, Kalbadevi Road, CP Tank Road, Naigaon Cross, Bellasis Road, Fanas Wadi, Shamsat Street were raided. After the raids, 23 repeaters were removed and 14 notices to take down the illegal devices were served. Officials said the devices are one of the main reasons why customers face network issues like call drops and low data speeds. The devices are installed to boost mobile signals.

Mobile network operators said they made large investments in purchasing spectrum and rolling out network equipment and urged authorities to take

These devices not only interfere with service provider's cell sites but also make mobile handsets transmit higher power

RAJAN S. MATHEWS Director general, COAI

strict action against users of the illegal equipment, which interfere with mobile networks and affect signal and network quality. Rajan S. Mathews, director general, Cellular Operators' Association of India (COAI), said, "Telecom operators are grappling with the challenges posed by these unauthorised network boosters. These devices not only interfere with service provider's cell sites but also make mobile handsets transmit higher power, so as to manage connectivity with the site. This leads to higher battery consumption and degraded network experience for consumers."

The DoT is empowered to impose penalties on sellers of this illegal equipment. Recently, on COAI's request, several e-commerce players had stopped the sale of illegal network boosters.

DoT cracks down on illegal mobile signal repeaters in Delhi raids

ENSECONOMIC BUREAU NEW DELHI, JUNE 12

THE WIRELESS Monitoring Organisation of the Department of Telecommunications (DoT), along with relevant authorities and telecom operators, conducted raids at several locations across Delhi to take down illegal mobile signal repeaters, the Cellular Operators Association of India (COAI) said in a statement. "Illegal mobile signal repeaters have become a major nuisance and are one of the biggest reasons for customers facing network issues like call drops and low data speeds. These illegal repeaters are installed by individuals/establishments at homes/offices/PG/guest houses to boost mobile signals.

"These illegal equipment interfere with mobile networks, impact signal quality and degrade network experience in the complete area. Mobile operators, who are making record investments in purchasing spectrum and rolling out network equipment, are grappling with this challenge and have called out the authorities to crack down on these installations and take strict action," COAI said. The locations where raids

"Mobile operators, who are making record investments in purchasing spectrum and rolling out network equipment, are grappling with this challenge and have called out the authorities to crack down on these installations and take strict action"

CELLULAR OPERATORS ASSOCIATION OF INDIA

were conducted include both residential and commercial establishments in areas such as Laxmi Nagar, Paharganj, Greater Kailash, Inderpuri, Adarsh Nagar, Model Town, Patel Nagar, South Extension, Chandni Chowk, Rohini, Sant Nagar, Lajpat Nagar, Rajouri Garden, Civil Lines, Ashok Vihar and Rajendra Nagar. The identified locations also include Gurgaon and Noida.

"Raids were also conducted in Karol Bagh where such illegal equipment is being sold," the statement said, adding that with this exercise in Delhi, 32 illegal repeaters were removed and 46 notices were given to remove identified ones with immediate effect.

वायरलेस मॉनिटरिंग विभाग : निवासी व व्यावसायिक ठिकाणे

अनधिकृतपणे मोबाइल सिग्नलसाठी बुस्टर लावणाऱ्यांवर कारवाई, २२ बुस्टर जप्त

लोकमत न्यूज नेटवर्क

मुंबई : मुंबईच्या विविध भागात चांगले मोबाइल नेटवर्क मिळण्यासाठी अनधिकृतपणे बुस्टर लागू करणाऱ्यांवर बुस्टर जप्त करण्यात आली. यापैकी २२ बुस्टर जप्त करण्यात आले, तर २६ ठिकाणी अशा प्रकारचे बुस्टर स्विकारून घ्यायचेची नोंद देण्यात आली.

टेलिकॉमनिकेशन मंत्रालयाच्या वायरेस मॉनिटरिंग विभागाकडे ही कारवाई करण्यात आली. कारवाई करण्यात आलेल्या ठिकाणांमध्ये निवासी व व्यावसायिक दोन्ही

ठिकाणांचा समावेश आहे. अजो, दादर, झोरी, यादर, विठ्ठलपूर पूर्व, एनजी रोड, प्रेर रोड, होशबाई रोड, जे.पी. नगर, फकतबाई रोड, सी.पी. टॉक रोड, नारायण क्रॉस, वेणुबाई रोड, फुलमचवती, शंभर रोड या ठिकाणी बुस्टर लावण्यात आली. ज्या ठिकाणी अशा बुस्टरची अनधिकृत बिक्री केली जाते त्या ठिकाणीही कारवाई करण्यात आली.

अनधिकृतपणे बुस्टर लावल्याने इतर ग्राहकांना त्यांचा वास सधन करवा लागतो. वास्तव काल झूप होणे, इंटरनेटचा वेग कमी होणे असे

प्रकार इतरांना सहन करावे लागतात. कोट्यावधी रुपये खर्च करून रोकड्या खरेदी करून ग्राहकांना चांगले मोबाइल नेटवर्क मिळावे यासाठी प्रयत्न करणाऱ्या मोबाइल कंपन्यांना या अनधिकृत बुस्टरचा मोठा आर्थिक फटका पसतो. त्यामुळे असे प्रकार करणाऱ्यांविरुद्ध कडक कारवाईचे पाऊल उचलण्यात आल्याची माहिती अधिकार्यांकडून देण्यात आली.

सेल्युलर ऑपरेटर्स असोसिएशन ऑफ इंडिया (सीओआय)चे महासंचालक राजन मॅथू यांचाच म्हणणे आहे, मोबाइल कंपन्या जागतिक दर्ज्याचा पाचमूठ सुविधा

तयार करत असताना अशा प्रकारे अनधिकृतपणे चालणाऱ्या व सर्रास होणाऱ्या प्रकारांमुळे आपल्या आरक्षणामध्ये आर्थिक वाढ होत आहे. युफोड केवळ मोबाइल कंपन्यांचेच नुकसान होत नाही तर याचा वापर करणाऱ्या मोबाइल ग्राहकांमधील नेटवर्कसाठी नेहमीपेक्षा आर्थिक बंदी घाघरी लागते.

असे ग्राहक करणाऱ्यांविरुद्ध सरकारने ठोस भूमिका घेऊन कारवाईचे पाऊल उचलल्यावाचून त्यांनी सरकारचे आजार व्यक्त केले. तसेच अशा प्रकारे सातत्याने कारवाई करण्याची मागणी केली.

COAI @COAIINDIA

Indian telecom operators and the Wireless Monitoring Organisation, DoT conducted raids on several locations across Delhi to take down illegal mobile signal repeaters installed by individuals effect. @Dishak34in @DoT_India @ETTelecom @TelecomTalk

Telecom Dept. India conducted raids across Delhi to take down illegal mobile signal repeaters installed by individuals effect. According to a statement by the COAI, the DoT along with the authorities have carried out raids and may impose heavy... @TelecomTalk

7:17 AM - Jun 12, 2018 - Twitter has disabled

Further in this regard, COAI had written to e-commerce players like Amazon, Rediff, Snapdeal, Flipkart etc. to stop the sale of these devices on their platforms. These e-commerce players while understanding the sensitivity of the matter, supported the request by removing these items from their platforms.

BBMP-OFC Cut in Bengaluru

Bengaluru was at potential blackout of its digital services across-the-board as BBMP (Bruhat Bengaluru Mahanagara Palike) had resorted to large-scale cutting of Optical Fibre Cable. This random cutting of OFC across city without any prior intimation could have led to huge outages and inconvenience to the citizens in densely populated areas. While the move was supported by some citizen groups and environmentalists, others suffered due to the sudden outages.

BBMP also issued an arbitrary order stopping work and cancelling all OFC permissions to telecom operators which disrupted the critical digital infrastructure and hurt businesses. COAI urged the authority to allow the restoration of impacted work immediately and to have clear and stable RoW Policy.

A joint letter by COAI and TAIPA was written to Additional Chief Secretary, Urban Development Department of Government of Karnataka, seeking their intervention in the matter. A meeting with the Hon'ble Chief Minister of Karnataka was also organized to discuss the concern.

Media Outreach: A 360 degree communication approach was adopted for highlighting this issue to the media. A media statement was issued at the initial phase of the crisis to provide the industry's opinion. *The media statement & press release got more than 40 coverage in all leading mainlines and regionals. The news was carried by PTI and coverage by local dailies including, The New Indian Express, The Hindu along with online news portals, ET Telecom, Business Standard, Outlook India, The Week etc.*



Service providers object to cancellation of OFC permission

SPECIAL CORRESPONDENT
BENGALURU

The Cellular Operators Association of India (COAI) and the Tower and Infrastructure Providers Association (TAIPA) have objected to the Bruhat Bengaluru Mahanagara Palike (BBMP) cancelling permissions to lay optical fibre cables (OFCs) in the city.

Rajan S. Mathews, COAI's Director General, said the move disrupts critical digital infrastructure and would hurt businesses. "To serve customers with quality services and to build Digital India, the telecom industry needs an enabling environment from the BBMP and the State government. We urge them to allow resumption of impacted work immediately, and to have clear and stable Right of Way policy," he said.

T.R. Dua, TAIPA's Director General, called the move a retrograde step. "It came without prior information and bilateral discussions with the industry, and is completely unjustified. This," he said, "would deprive citizens and especially businesses in the city

This step came without prior information and bilateral discussions with the industry and is unjustified. It will deprive citizens and businesses in the city of seamless network and Internet connectivity.

T.R. DUA
Director-General, TAIPA

of seamless network and Internet connectivity, and impede roll out of new technologies like 5G, M2M/IoT, besides impacting various ambitious programs such as Digital India and Smart City."

'Will fine companies'
BBMP Commissioner B.H. Anil Kumar ruled out going back on the decision.

"There is no disruption in telecom or internet services. We cannot simply let service providers damage civic infrastructure. We will fine companies if they are found to be laying OFCs after the permissions were cancelled," he said.

Karnataka CM intervenes to resolve tussle between telecom infra firms, BBMP

Karnataka Chief Minister B S Yediyurappa on Tuesday intervened to resolve a long tussle between telecom companies and Bengaluru municipal body BBMP over rolling out network in the state capital, industry body COAI said.

PTI • November 12, 2019, 21:17 IST



Year End Stories

As the year was ending, it was necessary to highlight the overall developments in the policy ecosystem and how the year had been in-toto, for the telecom sector. The government has envisioned to cover every “uncovered village” in a year so that no part of the country is left without communication services. There were a few highlights of the year like TRAI's consultation paper on review of IUC, Government's announcement on 5G spectrum auction, Hon'ble Supreme Court's ruling on AGR matter etc.

Yet another tumultuous year ahead for telecom industry

Move towards duopoly, AGR issue will be key challenges

RAJESH KURUP

Mumbai, January 1

2019 was a roller-coaster year for the telecom industry and 2020 will be another year of disruption that would radically change the ever-evolving sector's landscape. The worst for the sector is not over yet and the industry is likely to witness many surprising twists and turns this year.

Move towards duopoly

The biggest change for the industry, which is under financial strain, would be a move towards duopoly.

"The country is increasingly moving towards a duopoly, with only Reliance Jio Infocomm (Rjio) and Bharti Airtel. Vodafone Idea and Bharat Sanchar Nigam Ltd (BSNL) are in bad shape, and we don't know how long they can continue operations without the Government support," Amresh Nandan, Vice-President, Analyst at Gartner, told *BusinessLine*.

"It's not just the financial situation, but the overall crisis in the industry also played a part," he said, adding duopoly is not in the best interests of the sector.

To tide over the crisis, the



Firming up of tariffs and improved network connectivity are some of the expectations of the industry

telecom sector needs government support and most importantly on the Adjusted Gross Revenue (AGR) issue.

On October 24, the Supreme Court had upheld the Centre's plea to recover AGR of about ₹92,000 crore from telecom service providers, a move that widened the operators' losses. For the second quarter ended September 30, Vodafone Idea recorded a loss of ₹50,921 crore, the highest-ever loss for a corporate in India, on account of provisioning for AGR payouts, while rival Bharti Airtel posted its highest-ever net loss of ₹23,045 crore for the period.

"The industry is expecting a final resolution on AGR in

2020, and we hope that the Supreme Court's decision would lead to some positive outcome," Rajan S. Mathews, Director-General of Cellular Operators Association of India (COAI), the apex body of telecom industry, said.

Licence fee

The industry is also expecting a slash in licence fee in Budget 2020, following a representation made to Finance Minister Nirmala Sitharaman and the Department of Telecommunications (DoT).

"We have requested a reduction in licence fee to 3 per cent from the present 8 per cent of the revenue earned and slashing of Spectrum Usage

Charges to 1 per cent from about 6 per cent," Mathews said.

BSNL, MTNL revival

A revival in the fortunes of BSNL and Mahanagar Telephone Nigam Ltd (MTNL) is also expected in 2020, following the success of the State-owned companies' Voluntary Retirement Scheme (VRS). Nearly, 92,500 employees of the PSUs opted for the separation scheme.

"BSNL is on a revival path and the company is now gearing up for 4G launch with the Government already approving spectrum allocation. BSNL would be allocated 4G spectrum from March 2020, while

the management has also taken an initiative to outsource maintaining network to third party," Sanchar Nigam Executives' Association, an employees' union at BSNL, General Secretary Sebastian K said. "Employees saved BSNL, going to the extent of paying for the company's maintenance from their own savings, during the crisis and will work hard for its revival," he added.

5G roll-out

However, belying industry expectations, 5G roll-out would be delayed further. While the spectrum auctions are expected by the fourth quarter of this financial year, commercial roll-out of 5G would not happen in 2020.

"We will see a lot of progress on 5G tests but I think any meaningful launch is at least 1.5-2 years away," COAI's Mathews said.

Firming up of tariffs, improved network connectivity and stability on the hiring front are among the expectations of the industry in 2020.

"There also a need to increase fibre on the ground and without adequate fibre, 5G investments wouldn't be helpful," Gartner's Nandan said.

The telecommunication sector is the second largest and fastest growing in the world, with 1.8 billion users (fixed and mobile) as of September 30, 2019 (according to COAI data).

'We are expecting a final resolution on AGR this year'

RAJESH KURUP

Mumbai, January 1

Rajan S. Mathews, Director-General of Cellular Operators Association of India (COAI), speaks to *BusinessLine* on the challenges ahead for the telecom industry. Excerpts:



Rajan S Mathews, Director-General, COAI

With myriad issues plaguing the sector, how was the year 2019 for telecom?

The year started on a negative note due to the continuing losses arising from hyper competition and rate cuts among others, and culminated with the tremendous losses originating from Adjusted Gross Revenue (AGR). However, the year became better towards of the end of the year, but the low point for the industry was the Supreme Court ruling on the AGR. Among the positive things that happened for the industry was the extension of Interconnect Usage Charges (IUC), discussions on floor price, hike in tariffs among others. The year ended on a positive note.

What are your views on the spectrum auctions expected in 2020?

Spectrum auctions would happen by the fourth

quarter of this financial year, probably by March or April. We don't expect a lot of demand for the 5G spectrum due to the high prices.

Will we see 5G gaining ground in 2020?

We will see a lot of progress on 5G tests but I think any meaningful launch is at least 1.5-2 years away. We will see stability on hiring in the telecom sector and less anxiety on the employee side.

What are the industry's expectations for this year?

The telecom sector is expecting a final resolution on AGR, with a decision expected from the Supreme Court. We are expecting some reduction in licensing fee in the Budget, firming up of tariffs and less volatility in pricing, among others.



Media Outreach - Through opinion pieces, media interactions and standalone stories, we were able to bring forth the current financial health of the sector and the policies that directly impact it or can mitigate/manage it. Coverage was garnered in the *ET Telecom*, *Business World Dainik Bhaskar*, *Voice and Data* etc.

DoT workshop on RoW Rules, Broadband Readiness

Chennai, Sep 17: Department of Telecommunications (DoT), Ministry of Communications as a part of its nationwide State Government outreach programme to achieve goals of National Digital Communications Policy 2018 concluded its first chapter of awareness workshop with Southern State Authorities (Karnataka, Andhra Pradesh, Telangana, Kerala, Tamil Nadu, Puducherry, A&N Island and Lakshadweep Island). The workshop discussed about Broadband Readiness Index (BRI) for states, Right of Way issues, implementation and utilisation of BharatNet, connectivity to

uncovered villages, issues of alleged Electromagnetic Field (EMF) Emission from mobile towers and role of DoT LSA in States/UTs in implementation of various programs of DoT and coordination with State Authorities.

The workshop was presided by Anshu Prakash, Secretary (Telecom), DoT alongwith K. Shanmugam, Chief Secretary, Tamil Nadu, Sh. Chetan B. Sanghi, Chief Secretary, Andaman & Nicobar Islands and other senior officers from Department of Telecom and State/UT Governments. The workshop also attended by various stakeholders such as Infrastructure Providers

(IP-1), Telecom Service Providers, State Governments, Union Territories, local authorities and municipal corporations from Southern States of India. During inauguration Shri T.R. Dua, DG, TAIPA, Shri Rajat Kathuria, CEO, ICRIER and Rajan S. Mathews, DG, COAI gave introductory remarks.

During this first regional level workshop, which is an outreach programme of Government of India, it was informed that the telecom sector is the backbone for achieving various pillars of Digital India programme and has a multiplier effect for the various sectors of the economy. The rapid strides

made in the telecom sector were detailed, namely: the growth in number of telecom connections by 25% during last five years with 1186 million connections, increase in tele-density to 90.11 %, Internet connections grew by 2.5 times with 636.73 million internet connections in five years and with data consumption of 9.8 GB per subscriber per month, which is highest in the world which has been facilitated by one of the lowest data tariffs.

Mobile connectivity to the remaining inhabited uncovered villages (around 27,000) is being funded by the Department through Universal Service Obligation Fund (BharatNet, LWE Phase II, NE connectivity, Island connectivity etc). All villages will be provided mobile connectivity by the 75th year of India's independence (2022).

The workshop clearly brought out the role of States/UTs to improve digital connectivity and infrastructure throughout the country. It was agreed that for India's transition to a digitally empowered economy and society, fulfilling the information and communications needs of citizens and enterprises, and bridging the digital divide, State Governments and Union Authorities are fundamental to make it a reality.

Workshop on Broadband Readiness Index

Department of Telecommunications (DoT), as a part of its nationwide State Government outreach programme to achieve goals of National Digital Communications Policy 2018, concluded its first chapter of awareness workshop with Southern State Authorities (Karnataka, Andhra Pradesh, Telangana, Kerala, Tamil Nadu, Puducherry, A&N Island and Lakshadweep Island). The workshop discussed Broadband Readiness Index (BRI) for states, Right of Way issues, implementation and utilisation of BharatNet, connectivity to uncovered villages, issues of alleged Electromagnetic Field (EMF) Emission from mobile towers and role of DoT LSA in States/UTs in implementation of various programs of DoT and coordination with State Authorities.

In order to strengthen Department work with State/UTs on telecom issues, it was informed that for co-ordination, monitoring and implementation of projects, DoT units (LSAs) works closely with the State Authorities & Telecom Industry. The States/UTs were urged to form State Level Co-ordination Committee on Telecom matters with the participation of LSA for all telecom related matters.

On the sidelines of pricing problem insufficient spectrum, and quantum issue the 5G rollouts are likely to be delayed for at least five years.



Mr. Rajan S Mathews at the @DoT_India Regional Workshop with States and Union Territories at Chennai. The discussion will range from #RoW rules for #Digital Infrastructure to #Broadband Readiness Index and a session on #EMF Emission.



10:43 AM - Sep 16, 2019 - Twitter Web App

Mobile Tower Fraud

It has been brought to the notice of TRAI that some companies / agencies / individuals are fraudulently asking public to deposit money in their personal/companies account as Government Tax under Telecom Act for leasing their premises for installation of mobile towers. These companies / agencies / individuals become unreachable after collection of money. They are also issuing fake 'No Objection Certificates / Permissions' for the Installation of Tower purportedly issued by Ministry of Communications and Information Technology. TRAI while issuing a clarification with no involvement in any such activity, also requested telcos to initiate awareness measures.

टावर लगवाने का झांसा देने वालों से लोगों को सावधान किया सीओएआई ने

एजेन्सी | नई दिल्ली

मोबाइल सेवा प्रदाता कंपनियों के मंच सीओएआई ने निजी भवनों और परिसरों में दूरसंचार टावर लगवाने के नाम पर ठगी करने वालों से आम लोगों को सावधान किया है और कहा है कि कंपनियों अधिकारियों से अनुमति लेकर किसी जगह जरूरत के अनुसार टावर खुद लगाती हैं या टावर कंपनियों की सेवाएं लेती हैं। सेन्च्यूर अपरेटर्स एसोसिएशन आफ इंडिया (सीओएआई) के एक शीर्ष अधिकारी ने कहा कि

कंपनियां अधिकारियों से अनुमति लेकर खुद टावर लगाती हैं

जाली कागज दिखाकर विरवादा पैदा करते हैं
सहस्रों टावरों के नाम पर लोगों को धोखा देकर ठगने वाले हैं और इस तरह लाखों रुपये उठाते हैं और पकड़ने में भी नहीं आते। उन्होंने कहा कि वह रकम लौटी मोटी नहीं बल्कि हजारों में होती है।
धोखाधड़ी शहरी इलाकों में ज्यादा
कंपनियों खुद टावर स्थापित करती हैं या अरबों डॉलर का टावर टावर या अमेरिकन टावर कंपनी (एटीसी) जैसी बड़ी टावर कंपनियों के जवाब अनुबंध करती हैं। उन्होंने कहा कि इस तरह की धोखाधड़ी लंदन इलाकों में ज्यादा है जहां अक्सर जांच होती है और लोग एक दूसरे को कम परखते हैं।



नेटवर्क के हिसाब से लगता है टावर
कंपनियों टावर की जरूरत के हिसाब से लिए अलग अलग विचार देती हैं और लोग उनके चक्कर में धोखाधड़ी को अचानक खरी रकम दे बैठते हैं।
नेटवर्क से कहा कि दूरसंचार कंपनियों नेटवर्क की जरूरत के हिसाब से किसी इलाके में टावर लगावके के लिए जरूरी धोखाधड़ी और स्थायी विचारों से अनुमति लेती हैं।
लोगों को जागरूक करने का प्रयास
सहस्रों टावरों के नाम पर ठगने वाले हैं और पकड़ने में भी नहीं आते। उन्होंने कहा कि वह रकम लौटी मोटी नहीं बल्कि हजारों में होती है।

दूरसंचार विनियामक ट्राई को कुछ समय से ऐसी धोखाधड़ी की काफी शिकायतें मिली हैं जिसमें धोखाबाज लोगों से उनके परिसर में दूरसंचार टावर लगवाने को अनुमति दिलवाने और लगवाने के नाम पर मोटी रकम लेकर गायब हो जाते हैं।
ट्राई को मिल रही बहुत शिकायतें
सीओएआई के महादेशक राजन एस मैथ्यू ने कहा, "कुछ समय से ट्राई को बहुत सी जगहों से शिकायतें मिली हैं। धोखाबाज व्यक्ति आम लोगों को उनके परिसर में टावर लगवाने और अच्छा किराया कमाने का लालच देते हैं। धोखाबाज दावा करते हैं कि वे सर काम के लिए ट्राई, दूरसंचार विभाग या किसी दूरसंचार कंपनी से अधिकृत हैं।"

Amar Ujala
मोबाइल टावर लगाने के नाम पर हो रही है धोखाधड़ी, यहां करें शिकायत
#Mobiletower @DGCOAI
@ConnectCOAI @TRAI

Zee Business
20 March at 14:30
घर या कैम्पस में टावर लगवाने के झूठे में न आएं, COAI की सलाह मानें नहीं ठुकराते हैं।
See Translation

SHANTANU DUNIA
A bizarre scandal in the world's second largest telecom market has robbed a little over 100,000 gullible investors who were conned with false promises of becoming partners with telecom majors in setting up mobile towers. Fraud agents are visiting houses of people in both cities and the hinterland to sign them up for towers. Bulk of the agents are making telephonic and electronic transfer of cash, their modus operandi similar to one shown in the recent Netflix series Jinx, set in the dust-busted rural landscape of Jharkhand. "This is scary and serious, the telecom regulator is tracking such fraudsters along with police from across the country," Rajan S. Mathew, Director General, Cellular Operators Association of India (COAI) said in a telephonic interview to The Sunday Guardian. Mathew called it the tip of the iceberg. He felt the scam needs to be stopped in the hot because of the size of the market. India has over 500,000 towers providing seamless connectivity to the masses, telecom companies are adding anywhere between 20,000-100,000 towers every year, mostly in rural India and Tier 2 cities. The fraudsters—armed with fake lettersheads of telecom companies—are promising gullible investors secured monthly rentals ranging from Rs 35,000 to Rs 1,00,000. All the investors have to do is to deposit cash ranging from Rs 15,000 to Rs 35,000 for the first step of the agreement. The scam has a tinge of ponzi schemes, except there are no monthly deposits with promise of high returns. It's a one-time investment. On the face of it, the proposal looks good. The fraudsters call themselves agents on behalf of the Telecom Regulatory Authority of India or the telecom companies. They offer a lucrative monthly rent, of-

FRAUDSTERS SELL FAKE TELECOM TOWERS TO THE GULLIBLE

Bulk of the agents are making telephonic calls and seeking electronic transfer of cash.

of free installation of towers and even promise to waive the mandatory fees to the local municipal bodies. Everyone is offered a one-time payment of Rs 200,000 to Rs 300,000 and gifts like iPhones. In return, the gullible, unsuspecting owner of the property deposits cash into the accounts of the fake company as tax under the Telecom Act for entering their premises to set up telecom towers. The gullible property owner is also issued a fake receipt. Once the cash is deposited, the fraudsters close down their bank accounts and shift to another city. "We are getting huge complaints of this fraud from states like Uttar Pradesh, West Bengal, Tamil Nadu and Maharashtra. This is very alarming," says Mathew. Last year, Bloomberg Quint reported how a mass-marketing fraud in the name of a big telecom company has been luring unsuspecting victims across the country, dipping them of lakhs of rupees. These frauds, which are unique to India—owing to its rapidly expanding mobile market—trap victims by offering to "lease" out their land at exorbitant rents. In a complaint note in December 2019, TRAI had informed COAI that approximately 15 complaints per day relating to telecom tower fraud were being registered from various parts of India. Rajan said the COAI was working closely with Tower and Infrastructure Providers Association (TIPAI) and telecom operators to educate people not to get cheated by such fraudsters. "Most Indians do not know that the TRAI, or the regulator, is not directly or indirectly involved in leasing/renting of premises for installing mobile towers. It makes the job of the fraudsters easy," said Mathew. Mathew said the consequences of these home-to-home visits or fake calls, or phishing, could be serious if not checked immediately. Villagers in Bengal, Odisha, Jharkhand, Bihar and Uttar Pradesh lost over \$7 billion in their fund-pool schemes because they all believed fraudulent companies. The telecom tower fake companies work on a similar model. Con people who do not follow rules, lure them with promises of steady monthly returns and disappear with the one-time payment. There are no recalls. Sources in the telecom industry say it is the same story of the year, mostly Jharkhand, involved. In an elaborate scam, asking strangers for investment and then pushing them to transfer funds from their accounts. The sources further said that the scam has been going on for a while. The genesis of the idea, the first call or visit, the convincing and then the eventual disappearance emerges from previous scams which have hit the hinterland and Tier 2 and Tier 3 cities. "India just does not have those many cops to track these fraudsters. They have a field day. It can grow fast unless checked," said one of the sources. The Telecom Authority of India (TRAI) has started a text messaging campaign to alert people, some front-page advertisements have also appeared in some top newspapers to spread awareness among India's billion-plus subscribers. But the million-dollar question is: How many Indians will follow newspaper advertisements or respond to text messages? "People need to be alert themselves, they must know that the TRAI does not issue NOC for installation of mobile towers and a fraudster approaches them with such a letter, they need to report the matter to the concerned mobile service provider, even call the cops," said Mathew. Else, the scam will no longer remain the tip of the iceberg. A tower is a lucrative business for a market that is the world's second largest, with 1,200 million subscribers and the world's highest data usage per smartphone at an average of 9.8 GB per month.

टावर लगवाने का झांसा देने वालों से सावधान

नई दिल्ली | एजेन्सी

मोबाइल सेवा प्रदाता कंपनियों के मंच सेन्च्यूर अपरेटर्स एसोसिएशन आफ इंडिया (सीओएआई) ने निजी भवनों और परिसरों में दूरसंचार टावर लगवाने के नाम पर ठगी करने वालों से आम लोगों को सावधान किया है।
उसने कहा कि कंपनियां अधिकारियों से अनुमति लेकर किसी जगह जरूरत के अनुसार टावर खुद लगाती हैं या टावर कंपनियों की सेवाएं लेती हैं। सीओएआई के महानिदेशक राजन एस मैथ्यू ने कहा कि कुछ समय से ट्राई को बहुत सी जगहों से

- सतर्कता**
- कंपनियां अनुमति लेकर टावर खुद लगाती हैं : सीओएआई
 - ट्राई को हाल में धोखाधड़ी की काफी शिकायतें मिली हैं

शिकायतें मिली हैं। धोखाबाज व्यक्ति आम लोगों को उनके परिसर में टावर लगवाने और अच्छा किराया कमाने का लालच देते हैं। धोखाबाज दावा करते हैं कि वे इस काम के लिए ट्राई, दूरसंचार विभाग या किसी दूरसंचार कंपनी से अधिकृत हैं। उन्होंने कहा कि धोखाबाज इस संबंध में कोई जाली कागज दिखा

कर लोगों में विश्वास पैदा कर लेते हैं और धन लेकर गायब हो जाते हैं और पकड़ने में भी नहीं आते। उन्होंने कहा कि यह रकम छोटी-मोटी नहीं बल्कि हजारों में होती है। कंपनियां टावर की जगह के पट्टे के लिए अच्छा खास किराया देती हैं और लोग उसके चक्कर में धोखाबाजों को अच्छी खासी रकम दे बैठते हैं। मैथ्यू ने कहा कि दूरसंचार कंपनियां नेटवर्क की जरूरत के हिसाब से किसी इलाके में टावर लगवाने के लिए सरकारी एजेंसियों और स्थानीय निकायों से अनुमति लेती हैं। कंपनियां खुद टावर स्थापित करती हैं या भारतीय इन्फ्रस्ट्रक्चर, इंडस टावर या अमेरिकन टावर कंपनी

(एटीसी) जैसी बड़ी टावर कंपनियों के साथ अनुबंध करती हैं। उन्होंने कहा कि इस तरह की धोखाधड़ी शहरी इलाकों में ज्यादा है जहां आबादी ज्यादा होती है और लोग एक दूसरे को कम पहचानते हैं। उन्होंने कहा कि वह सखी हितधारकों के साथ मिल कर इस तरह के प्रति लोगों का जागरूक करने का प्रयास कर रहे हैं।
प्रस्ताव मिलने पर पूछताछ करें:
मैथ्यू ने कहा लोग टावर लगवाने के प्रस्तावों की वास्तविकता के बारे में राष्ट्रीय उपभोक्ता हेल्पलाइन, दूरसंचार विभाग कंपनियों और स्थानीय अधिकारियों से पूछताछ कर सकते हैं।

COAI Knowledge Series

The objective of the Knowledge Series is to update the media on issues pertaining to the telecom sector. Two rounds of Knowledge Series were conducted by COAI over the last one year and the initiative was well received by the media. The topics covered were- Financial Issues in Telecom Sector and Demystifying mobile broadband experience.

- On financial issues in the telecom sector - COAI seeks clear roadmap for resolution of issues plaguing telecom sector

COAI organized an interactive session with media and had a discussion on Telecom Sector. COAI said “the new government post elections should set out a clear roadmap to ease the burden of levies on the telecom sector, and issues including a cut in license fee and spectrum charges should be taken up at the earliest, preferably in 6-9 months' timeframe. COAI ruled that revenue continues to remain under pressure for the industry saddled with high debt, and for most players, the earnings before interest, tax, depreciation and amortization or EBITDA generated “is not enough to meet the interest expenses”.

This was covered widely by the media houses like PTI, The Financial Express, Deccan Herald, DNA etc.

- Joint session with OpenSignal on Demystifying mobile broadband experience. Availability and Speeds in India. The report highlighted that India is among top 5 countries with 4G capabilities.

New govt should revive industry: telecom body

NEW DELHI, DHNS: Indian Telecom operators on Tuesday urged that the new government should ease financial stress of the industry through clear road map by addressing host of issues, including spectrum charges and license fee.

Telecom body Cellular Operators Association of India (COAI) said if the new government addressed the problems in the first 6-9 months, it would help the industry to come out from its financial stress.

“The revenue continues to remain under pressure for the industry saddled with high debt, and for most players the earnings before interest, tax, depreciation and amortization or EBITDA generated is not enough to meet the interest expenses,” Rajan S Mathews, Director General of COAI, told reporters here.

He also demanded that income from interest, dividend, capital gains from sale of fixed assets, gains from forex fluctuation, income from rent, insurance claims and distributors' margin should not be included in the revenue of the telecom operators for the purpose of computation of licence fee and spectrum usage charges.

DH News Service



COAI @ConnectCOAI

COAI ruled that revenue continues to remain under pressure for the industry saddled with high debt, and for most players, the EBITDA generated “is not enough to meet the interest expenses”. @kiranrathee1

Lok Sabha elections 2019: Industry body seeks roadmap from ... Under the Unified License Agreement, the licence fee currently is 8 per cent of the AGR. Further, in case the operator obtains ... @financialexpress.com

11:22 AM - Apr 3, 2019 · Twitter Web Client

COAI expects new govt to reduce levies

KIRAN RATHEE
New Delhi, April 2

THE TELECOM INDUSTRY is hoping that post-elections, whichever government comes to power, will focus on reforms in the sector by reducing various levies. The reforms have been promised in the new telecom policy document prepared by the department of telecommunications.

Reduction in levies like license fee, spectrum charges and other taxes, has been a long pending demand of telcos, which have been struggling financially over the last couple of years. The new National Digital Communication Policy (NDCP) also talks about rationalisation of telecom sector levies but despite the notification of the policy in November last year, there has been no movement on the issue.

Industry body Cellular Operators Association of India (COAI), wants the new govern-

ment to set out a roadmap for reduction in levies, starting with a cut in licence fee and spectrum charges within 6-9 months of assuming office. The industry body also wants the deficit (total adjusted gross revenues (AGR) to be reviewed and Tel recommendations on it to be adopted.

According to COAI's director general Rajan Mathews, the NDGP talks about all the issues and it should be implemented at the earliest to ease out the burden on telecom operators. He said revenues of the sector remain under pressure and debt has increased to ₹7.7 lakh crore in FY 18.

“Telecom Ebitda continues to contract while the interest expenses of the industry continue to rise. In Q2 of FY19, interest expenses have become greater than Ebitda of the telecom industry,” he said.

COAI in support of minimum broadband speed of 2Mbps

OUR BUREAU

New Delhi, May 15

Telecom industry body Cellular Operators Association of India (COAI) on Wednesday said the minimum speed of broadband and internet should be 2Mbps, at least for the 4G services.

As of now, a speed of 512 Kbps is termed as normal broadband speed in India, which is far lower as compared with other markets globally. The government is in the process of making 2Mbps as the minimum broadband speed soon, which is still lower than many other countries.

"COAI supports the demand that the minimum speed of broadband be at 2Mbps on a 4G network," said Rajan Mathews, Director General, COAI.

He said operators may drop the network to 2G or 3G when the 4G services are not available, in case devices are not supportive.

AGM 2019 and High Level Leaders' Panel Discussion

COAI hosted Annual General Body Meeting 2019, where the New Chairman and Vice Chairman were announced. The AGM was followed by a High Level Leaders Panel Discussion which was attended by dignitaries like Shri Anshu Prakash, DoT, Shri S.K. Gupta, TRAI, and other industry leaders. The news was covered by PTI Bhasha and further covered in leading regional publications such as *The Economic Times Hindi*, *Business Standard Hindi*. Additionally, it was picked by *ET Telecom*, *Business Standard*, *The Times of India*, etc.



सीओएआई की वार्षिक आम सभा में वर्ष 2019-20 के लिए कंपनी के नेतृत्व का एलान

नई दिल्ली, (एनएस)। दूरसंचार, इंटरनेट, टेक्नोलॉजी और डिजिटल सेवा कंपनियों का प्रतिनिधित्व करने वाले उद्योग के शीर्ष समान स्वीओएआई ने वित्त वर्ष 2018-19 के लिए अपनी वार्षिक आम सभा को बैकड्रॉल से आयोजित की। इस बैठक के दौरान 2019-20 के लिए कंपनी के नेतृत्व को घोषणा की गई। सीओएआई के वार्षिक एक्जीक्यूटिव ऑफिसर श्री बालेश शर्मा अय्य अय्यश का पद संभालेंगे, जबकि अय्य पुरी, सीओ ऑपरिंग ऑफिसर (भारत और दक्षिण एशिया), भारतीय एयरटेल लिमिटेड सीओएआई के उपाध्यक्ष बने रहेंगे। बालेश शर्मा के पास विभिन्न क्षेत्रों का दस दशकों का समृद्ध अनुभव है और परिवर्तनकारी नेतृत्व, सफल टर्नअराउंड और प्रभाव डालने वाली अग्रणी शक्तिशाली के तौर पर उनका एक महत्वपूर्ण ट्रैक रिकॉर्ड है। इससे पहले, बालेश शर्मा ने सीओएआई के वीओ

ऑपरिंग ऑफिसर (सीओओ) के तौर पर काम कर चुके हैं, वे वोडाफोन इंडिया लिमिटेड के निदेशक मंडल के सदस्य रहे हैं और साथ ही वे इसकी कार्यकारी समिति के सदस्य के तौर पर भी काम कर चुके हैं। संयोजन में उनके दायित्वों में सकल ऑपरेशंस, सर्विस डिजीटली, मार्केटिंग, कार्मिगल और एंटरप्राइज प्रशासन शामिल रहे हैं। उन्होंने इससे पहले भारत में और अंतरराष्ट्रीय स्तर पर कई वरिष्ठ प्रबंधन पदों का भी दायित्व संभाला है, जिसमें विनोबस सेड का पद भी शामिल है और साथ ही वे वोडाफोन भारत के अध्यक्ष और सीओओ के तौर पर भी काम कर चुके हैं। भारत लौटने से पहले के कारोबार को सफलतापूर्वक बदलते हुए नेट प्रमोटर स्कोर लीडरशिप और महत्वपूर्ण कंपनियों के साथ महत्वपूर्ण साहज हिस्सेदारी यहाँ।

सीओएआई की वार्षिक आम सभा का आयोजन, वर्ष 2019-20 के लिए कंपनी के नेतृत्व का एलान

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• COAI and ETSI sign MoU to foster a closer co-operation on Telecom Standardization

Acknowledging the role of standards, especially in the context of emerging technologies and technologies of the future and the need to collaborate and work in partnership with different types of organizations around the world, COAI and ETSI signed an MoU to work and collaborate on areas of mutual interest.

COAI, ETSI join hands for telecom standardization

The Cellular Operators Association of India (COAI) and European Telecommunications Standards Institute (ETSI) have acknowledged the role of standards, especially in the context of emerging technologies and the need to collaborate and work in partnership with different types of organizations around the world. To take it forward, COAI Director General Rajan S Mathews and ETSI DG Luis Jorge Romero signed a Memorandum of Understanding (MoU), with a common objective to perform and promote, directly or indirectly, regional and international standardization.



Rajan S. Mathews, Director General, COAI, said, "We are extremely excited to enter into this strategic partnership with ETSI. This partnership will allow us to have a regular and continuous dialogue between EU and India to strengthen the standardization efforts in the field of ICT, through various workshops, conferences and meetings." Luis Jorge Romero, Director General, ETSI, said, "We are immensely happy to partner with COAI towards the advancement of modern communication. This partnership will help ETSI to further leverage its activity in India and to promote the use of standards-based communication technologies. This MoU is also in line with the ETSI's vision of creating globally acceptable, harmonized, open standards."

Seconded European Standardization Expert (SESEI) local representative of ETSI based in New Delhi will be working closely with COAI through this MoU to strengthen their relationship and foster a closer co-operation on common agenda items between them and promote ETSI-India cooperation on standards related issues.

COAI, ETSI Team Up for Telecom Standardisation

New Delhi: The Cellular Operators Association of India (COAI) and ETSI have signed a memorandum of understanding (MoU) to foster closer co-operation on telecom standardisation. A European standardisation organisation, ETSI is not-for-profit body with over 850 member entities globally and offers an open and inclusive

environment to support development, ratification and testing of globally applicable standards for Information and communications technology (ICT) systems and services across various sectors.

The MoU was signed by Rajan S Mathews, Director General of COAI and Luis Jorge Romero, Director General of ETSI — PTI

सीओएआई ने दूरसंचार मानकीकरण के लिए यूरोपीय संगठन से किया करार

नयी दिल्ली, दूरसंचार कंपनियों के संगठन सेल्यूलर ऑपरेटर्स एसोसिएशन ऑफ इंडिया (सीओएआई) ने दूरसंचार मानकीकरण को लेकर तालमेल को बढ़ावा देने के लिये यूरोप के मानकीकरण संगठन ईटीएसआई के साथ समझौता किया है।

इस समझौते पर सीओएआई के महानिदेशक राजन एस. मैथ्यू और ईटीएसआई के महानिदेशक लुईस जॉर्ज रोमेरो ने हस्ताक्षर किये। एक संयुक्त बयान में कहा गया, "ईटीएसआई और सीओएआई के पास वैश्विक सूचना संचरणा तैयार करने में योगदान देने के लक्ष्य के साथ प्रत्यक्ष या परोक्ष तौर पर क्षेत्रीय

एवं अंतरराष्ट्रीय मानकीकरण का साझा कार्यक्रम है।" ईटीएसआई का क्षेत्रीय प्रतिनिधि सेंकडेड यूरोपियन स्टैंडर्डाइजेशन एक्सपर्ट दोनो संगठनों के साझा एजेंडे पर बेहतर तालमेल विकसित करने तथा संबंध को मजबूत बनाने के लिये सीओएआई के साथ मिलकर काम करेगा। वह मानकीकरण से संबंधित मुद्दों पर ईटीएसआई-भारत के तालमेल को भी बढ़ावा देगा। मैथ्यू ने कहा, "इस भागीदारी से हमें वर्कशॉप, संगोष्ठी एवं बैठकों के जरिये आईसीटी के क्षेत्र में मानकीकरण के प्रयासों को मजबूत करने में यूरोपीय संघ और भारत के बीच नियमित एवं लगातार संवाद स्थापित करने में मदद मिलेगी।"

• COAI's statement on formation of Committee of Secretaries

COAI welcomes the move by the government to set up the CoS to look into the matter of the financial distress and relief for Telcos. It also suggested that the CoS should perhaps take a two pronged approach - an immediate relief package to ensure Operator viability in the light of the SC Order and requirement to pay in 3 months (Phase 1), and the longer term relief to ensure long term viability and financial sustainability and health of the sector.

RELIEF PACKAGE FOR CARRIERS

Panel of Secretaries to Suggest Steps to De-stress Telecom

To mull moratorium on spectrum payments, cuts in USOF component of licence fee and in SUC, and floor for tariffs

Stress Factor

Wide Mandate For Panel

Suggest measures to restore sector's health in timebound manner

Measures to spur growth of sector, improve quality of services

Pain Points

Sector's adjusted gross revenue down around 25% between FY17 and FY19

Price war has dragged price of data to ₹8 per GB, lowest in world

SC ruling on AGR to add to sectoral woes

New Delhi: A panel of secretaries will take stock of financial stress in the debt-laden telecom sector and suggest steps to provide relief to carriers such as Vodafone Idea and Bharti Airtel that are facing an over ₹30,000 crore piling up. In addition, statutory dues after the Supreme Court order on adjusted gross revenue (AGR).

Officials in the Department of Telecommunications (DOT) said the Committee of Secretaries (CoS), headed by cabinet secretary Rajiv Gauba and likely comprising secretaries in the telecom, finance and law ministries, will consider steps such as a two-year moratorium on spectrum payments - for FY20 and FY21 - to ease the cash flow situation of telcos, besides reductions in the Universal Service Obligation Fund (USOF) component of the licence fee, currently at 3% of AGR, and spectrum usage charges (SUC), currently around 3% of AGR. One of the officials said it was expected that the Telecom Regu-

latory Authority of India (Trai) would, in parallel, also examine the aspect of minimum charge for voice and data services to ensure that the financial health of the telecom sector remains robust and viability is sustained. ET had reported in its October 24 edition that the government was discussing the issue of setting a floor for tariffs to provide long-term support to the sector.

Two-pronged Approach → 12

‘CoS to look into financial stress in telecom sector after SC order’

PRESS TRUST OF INDIA NEW DELHI, OCTOBER 29

THE GOVERNMENT has constituted a committee of secretaries to explore financial relief package for telecom sector by lowering spectrum charges as well as ending the era of free mobile phone calls and text messages as companies look at the government for avoiding payment of thousands of crores of rupees in overdue statutory dues.

The Committee of Secretaries, headed by Cabinet Secretary Rajiv Gauba, has been asked to examine "all aspects" of "financial stress" faced by service providers such as Bharti Airtel and Vodafone Idea and suggest measures to mitigate them, sources in the Department of Telecommunications (DOT) said.

The panel, which will comprise secretaries to the ministries of finance, law, and telecom, has been asked to look at the demands of telecom service providers (TSPs) for deferral of payments from non-telecommunication businesses in calculating the annual gross revenue of telcos, a share of which is paid as licence and spectrum fee to the regulator; the rule sought a two-year moratorium on spectrum payments beyond April 2020 till March 2022, reduction in licence fee from 3 per cent to 1 per cent, and cutting USOF to 1 per cent.

TELCOS DEMAND FOR DELAYING SPECTRUM PAYMENTS

The Committee of Secretaries, headed by Cabinet Secretary Rajiv Gauba, has been asked to examine "all aspects" of "financial stress" faced by service providers

and data services, which accordingly weakened the confidence of the CoS, saying the panel in its first meeting on October 28, which was held in a closed-door session, may not be able to meet the deadline of 60 days. The CoS, which is expected to meet shortly and submit recommendations in a time-bound manner, will consider the demands of TSPs to defer spectrum auction payments for 2020-21 and 2021-22 in order to ease cash flow and lowering USOF charge to 3 per cent, sources said.

While older TSPs such as Bharti Airtel and Vodafone Idea have been talking of financial stress ever since they faced intense competition from Reliance Jio, the matter has assumed greater importance after the SC's October 24 judgement. The apex court upheld the government's position in calculating annual adjusted gross revenue (AGR) of telcos. After the order, Airtel, Vodafone Idea and other telcos may have to pay the government ₹ 1.31 lakh crore within three months.

Sets up panel to chalk out steps which may mark end of free voice calls & cheap data

By Mail Today Bureau in New Delhi

THE GOVERNMENT has set up a committee of secretaries to explore the financial stress of the country's mobile telecom sector in the wake of a Supreme Court order that has given telcos ₹16,000 crore in debt relief. The committee, headed by cabinet secretary Rajiv Gauba, will look into the issue of free voice calls and cheap data services, which are expected to be ended by the government in the next few months. The panel will also look into the issue of spectrum charges and the impact of the SC order on the telecom sector.

Govt readies lifeline to rescue telcos



Govt readies lifeline to rescue telcos. The government is expected to announce a relief package for the telecom sector, including a moratorium on spectrum payments and a reduction in the Universal Service Obligation Fund (USOF) component of the licence fee. The package is expected to be announced in the next few days.

AIRTEL DEFERS Q2 RESULT

Airtel has deferred its Q2 results due to the impact of the SC order. The company is expected to announce its Q2 results in the next few days.

• **COAI's statement on the Hon'ble Supreme Court's judgement on definition of AGR**

COAI and the Telecom sector expressed its deep disappointment on the Hon'ble Supreme Court's judgment on the definition of Adjusted Gross Revenue (AGR) which will have an impact of over INR 92,000 crore on the industry. The telecom EBITDA continues to contract, while the interest expense of the Industry continues to increase. The Supreme Court's judgment is the last straw in contributing to financial distress and it remains to be seen whether the industry will be able to recover from this setback.

'Final straw for already distressed telecom sector'

SC order will affect fund-raising capacity of telcos: industry

SPECIAL CORRESPONDENT
NEW DELHI (BUREAU)

Terming the Supreme Court judgement over calculation of adjusted gross revenues as the last straw in contributing to the financial distress of the telecom sector, the industry said analysis on Thursday said the move will negatively affect the fund raising capacity of telcos, impacting broadband and network expansion in the country, along with the government's flagship Digital India initiative.

With the SC ruling in favour of the government, telecom companies will need to pay up about ₹92,000 crore in dues to the government.

The order will dampen the sentiment of telecom operators and, raising funds for broadband, network expansion and Digital India will hit a significant roadblock, Prashant Singhal,



Emerging Markets, Technology, Media and Telecom leader at EY said. He added that the impact will not be limited to operators but will have a domino effect on the larger digital value chain. Rajan S. Mathews, Director General at industry body COAI, said it remains to be seen whether the industry will be able to recover from this setback. He added that the taxes and levies in the Indian telecom sector, ranging from 29% to 32%, are one of

the highest globally. "The sector is already reeling under a daunting debt of about ₹4 lakh crore. The telecom EBITDA continues to contract, while the interest expense of the industry continues to increase," he said.

Vodafone Idea, whose shares tumbled 23.26%, said the judgment had significant damaging implications for the industry. The firm said it would study the ruling to determine next steps. "If there are technical or procedural grounds for doing so, this could include a Review Application," it added.

An Airtel spokesman said, "Of the 5-6 old operators impacted by the order, only two private operators remain today. The Centre must review the impact of this decision and find ways to mitigate the financial burden on an already stressed sector."

SC ruling to worsen viability for debt-laden sector: Telcos

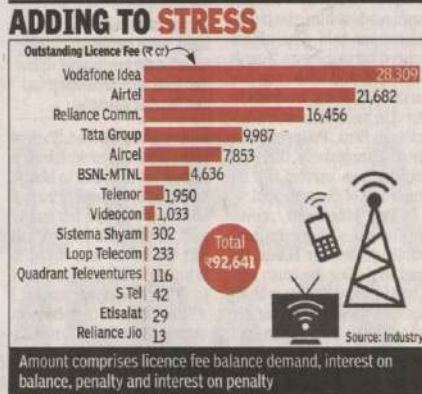
Operators Have Little Fiscal Room To Shell Out ₹93,000Cr

Pankaj.Doval@timesgroup.com

New Delhi: Can the financially-crippled telecom industry pay the government Rs 93,000 crore that has fallen due as licence fee outstanding after the SC ordered it to do so? If another Rs 46,300 crore gets added to this as pending payments towards spectrum usage charges — its official demand is still not clear — it may be curtains down for one of the top operators in case some relief is not offered by the government.

The fragile financial condition of top players such as Vodafone Idea and Airtel (new entrant Jio is largely unaffected with near-negligible dues), shows they may have very less room to cough up any substantial money, even when they are ordered to do so legally, as they already have a massive debt piled up and are struggling to maintain regular operations.

The 15-year-old legal dispute also means that many of the companies, which have been asked to pay up the outstanding, have shut shop, or



have moved out, or have merged operations. These include foreign operators such as Etsalat, Telenor, and Sistema. Others such as Reliance Communications, Tata group, Aircel, and Videocon have already shut their consumer mobile businesses, and some are even facing bankruptcy proceedings, which means extracting money would be an arduous task.

"We are disappointed by the verdict... This decision has come at a time when the sector is facing severe financial stress and may further weaken viability of the sector," Airtel, which has a Rs1.16 lakh crore debt on its books, said.

Vodafone Idea, which perhaps is in the worst financial condition, said its legal advisers are studying the ruling. "If there are technical or procedu-

ral grounds for doing so, this could include a review application." However, the telco made it clear that the order has "significant damaging implications" for the industry. "We request government's urgent engagement to find ways to mitigate financial stress."

Prashant Singhal, telecom sector leader at Ernst & Young India, said the ruling's impact will be widespread, and the government's Digital India and 5G auctions plans could be jeopardised. "It's a disaster, and will have a larger impact on telecom value chain. The sector is stressed, and the stress will increase even more. How will 5G happen, and who will have money to invest?"

Industry body COAI said the industry is going through one of its most "disruptive" phases. "Taxes and levies in the sector, ranging from 29% to 32%, are one of the highest globally. The judgment is the last straw in contributing to financial distress and it remains to be seen whether the industry will be able to recover," Rajan S Mathews, DG of COAI, said.

"The Supreme Court's judgment is the last straw in contributing to #financial distress and it remains to be seen whether the #industry will be able to recover from this setback," said Rajan S Mathews @rsprasad @airtelindia @reliancejio @Vodafone_NEWS



AGR verdict last straw in contributing to telcos' financial distress, says COAI. It remains to be seen whether the industry will be able to recover from this setback, the association said. The immense financial pressure on the sector will also...

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"The sector is in dire #financial straits as operators are making negative returns on investments. The taxes & levies in the Indian #telecom sector, ranging from 29% to 32%, are one of the highest globally," said Rajan S Mathews @rsprasad @NewIndianXpress

Supreme Court orders Telecom companies to clear dues worth...
"We allow the appeals of the DoT... The gross revenue will prevail as defined, as 'gross revenue'," said the court citing no...
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• **COAI's statement on MoF's announcement on Telecom Sector**

COAI welcomed the fact that the government recognises the financial distress of the telecom sector and has provided relief in the form of deferrals of spectrum payments. COAI also requested the government to consider the vexing issue of AGR and address the anomaly of continuing with the previous legacy issue of revenue share and License Fees and SUC when spectrum has already been paid for up front.

Telcos get 2-yr breather to pay for spectrum

SUBHAYAN CHAKRABORTY
New Delhi, 20 November

The debt-ridden telecom industry, looking for financial relief from the government, has got a two-year moratorium in making payments for past spectrum auctions.

The Union Cabinet on Wednesday decided to defer spectrum payments dues of the telcos for 2020-21 and 2021-22, a move that will offer an estimated ₹42,000-crore overall relief to Bharti Airtel, Vodafone Idea and Reliance Jio over the next two years. While Vodafone Idea has got the maximum relief of more than ₹24,500 crore, Airtel and Jio's moratorium is pegged at around ₹11,000 crore and ₹6,800 crore, respectively. The Cabinet decision is based on a recommendation by a

₹42,000 CR BOOST

committee of secretaries headed by Cabinet Secretary Rajiv Gauba.

This comes soon after all three private telecom operators announced they were raising mobile phone tariffs. Sources said the government had asked telecom firms to set their house in order by raising tariffs before seeking relief. Setting a tariff floor was the other option. The recent Supreme Court order, asking telcos to pay AGR dues of around ₹1.33 trillion, only pushed Bharti Airtel and Vodafone Idea to say the liabilities would make it tough for them to continue as going concerns.

After the Cabinet meeting, Finance Minister Nirmala Sitharaman told the media in a late-night briefing that the deferred amount will be spread out equally over the remaining instalments.

Turn to Page 15 ▶

Telcos to provide bank guarantee of revised annual instalment

▶ From P 1

The two-year extension on payment of spectrum purchase instalments will immediately give telecom companies much-needed cash in hand, especially Vodafone Idea and Airtel, which recently suffered deep losses. While Vodafone Idea declared a record net quarterly loss of nearly ₹5,000 crore for the second quarter, mainly by front-loading the AGR burden (AGR due of ₹5,583 crore), for Airtel the loss was ₹2,300 crore (₹5,506 crore outstanding).

The two-year moratorium — for fiscal 2020-21 and 2021-22

— was handed out after a recommendation by a high-powered Committee of Secretaries (CoS) that was tasked with working out a solution to the financial mess of the telecom sector. Sitharaman said

DISTRESS CALL ANSWERED?

after the Cabinet approved the measure. "These deferred amounts will be equally spread over the remaining instalments to be paid by the telecom companies without any increase in the existing time period specified for making the instalment payments."

Also, the minister said that

the interest — as stipulated while auctioning of the concerned spectrum — will be charged so that the NPV (net present value) of the payable amount is protected, and remains intact. "That's not getting also

red. As per the current policy the telecom service providers will continue to securitise the next payable annual instalment by a financial bank guarantee of an amount equivalent to the instalment."

Thus, a telecom company that will opt for a two-year de-

ferred amount will need to provide the government a financial bank guarantee of the revised annual instalment amount payable for the year 2022-23.

The industry welcomed this measure, but said it requires relief on the AGR matter to take the financial burden off the mobile operators. "It's certainly good and we are grateful to telecom minister Ravi Shankar Prasad and the DoT for pushing for the spectrum payment relief. This was one of the early requests we had made and it will help with immediate cash-flow situation," Rajin Mathews, Director-General of Cellular Operators Association of India (COAI), said.

Telcos...

However, she clarified that the existing time period specified for making the payments wouldn't be extended. Also, the interest, as specified at the time of auctioning, would be charged so that the net present value (NPV) of the payable amount is retained.

"The telecom firms opting for a two-year moratorium would need to provide a guarantee of the revised annual instalment payable for 2022-23. Thanking Telecom Minister Ravi Shankar Prasad and the Department of Telecom (DoT) for supporting the industry and pushing the industry request to the FM, Cellular Operators Association of India director general Rajan S Mathews said, "This will certainly provide some immediate cash flow relief to the industry."

However, the association, representing all major telcos, has pointed out that the high level of levies and taxes continued to be a challenge for the sector. "The telcos pay up to 30 per cent of their revenues to the government, by way of various levies and taxes, which is an enormous burden on the industry. 30 per cent of what is collected is passed on to the government."

₹42,000 CR IMMEDIATE RELIEF FOR 3 TELCOS

Two-year Moratorium on Spectrum Payments

Deferment will ease cash outflow, and facilitate payment of govt dues and interest on bank loans

Some Breather

Deferred Spectrum Payments

Vodafone Idea	Bharti Airtel	Reliance Jio
23,920	11,746	6,870
TOTAL: ₹42,536		

Our Bureau

New Delhi: The Cabinet Wednesday cleared a two-year moratorium on spectrum payments, which will give immediate relief of more than ₹42,000 crore to India's three mobile phone companies, two of which — Bharti Airtel and Vodafone Idea — have been struggling with high debt and huge losses amid spurious competition.

In view of the current financial stress faced by major telecom service providers and in pursuance of the recommendations by the Committee of Secretaries (CoS), it is decided to defer receipts of spectrum auction instalments due from the TSPs (telecom service providers) for the years 2020-21 and 2021-22," Finance Minister Nirmala Sitharaman said at a press briefing after a Cabinet meeting.

Thus, Vodafone Idea, Bharti Airtel and Reliance Jio would need to make the next spectrum payment to the government

What Govt Sources Say

Won't allow monopoly in telecom sector

Telcos to meet in next few days to discuss steps to make sector profitable, including tariff hikes

AGR dues a legal issue, timeline for payment fixed by court

Any extension/calibration has to be done under court direction

Telcos knew about AGR liabilities since 2011, should have provided for it

only in fiscal 2022-23

ET had on October 16 reported that the government was considering the two-year moratorium on spectrum payments.

Update: Industry Hopes for More ▶▶

Slew Of Reforms & Relief Measures In Bid To Revive Economy

Govt hands ₹42,000cr lifeline to struggling telecom firms

2-Yr Moratorium On Payment Of Spectrum Dues

Pankaj.Doyal@timesgroup.com

New Delhi: The beleaguered telecom industry was handed a Rs 42,000 crore lifeline by the government as it announced a two-year moratorium — for fiscal 2020-21 and 2021-22 — on payment of spectrum dues by mobile operators.

FULL COVERAGE: P 7

However, there was no relief on the Rs 1.47 lakh crore Adjusted Gross Revenue (AGR) demand arising from the Supreme Court's judgment on October 24. Any relief on the matter can only be given by the top court. The telcos are already in the process of filing a challenge to the judgment.

While the spectrum payment relief for Airtel will be Rs 11,746 crore, Vodafone Idea

NOD FOR ONION IMPORT

Onion Cabinet approves import of 1.2 lakh tonnes of onion to tide over short supply and check rising prices. On Wednesday, the average wholesale price of onion at Lasaigaon hit an all-time high of Rs 5,850 per quintal

Toll Clears amendments & modifications in toll-operate-transfer model and securitisation of user fee receipts of national highway

Construction Okays initiatives to revive sector

will get a reprieve of Rs 23,920 crore and Reliance Jio Rs 6,870 crore. Finance minister Nirmala Sitharaman said the relief had been given in view of the current financial stress faced by telecom companies.

Vodafone Idea and Airtel, which have declared huge losses, had said that their ability to remain afloat may be severely impacted if there's no immediate relief.

▶ Revised instalment, P 14

Upbeat Industry Hopes for More

▶▶ From Page 1

For Vodafone Idea, which posted a loss of its 61,000 crore in the July-September quarter with negative free cash flows, this means postponing a payment of Rs 23,920 crore, government sources said. For Airtel, which posted a quarterly loss of over Rs 2,300 crore, it's a Rs 11,746 crore relief. Jio, the only profit-making telco in India, can delay payment of Rs 6,870 crore to the government.

Besides the spectrum payments on which they got relief, Vodafone Idea and Airtel also need to pay a combined Rs 80,000 crore in licence fees, spectrum usage charge, penalties and interest to the government after a recent Supreme Court ruling expanded the definition of adjusted gross revenue (AGR). The AGR dues have to be paid in less than three months and the government has said that it was not currently considering any changes to this.

While the industry was upbeat about Wednesday's decision, it hoped that the government would also consider its other requests, including reduction in levies and taxes, besides waiving the interest and penalties which form a bulk of the Rs 1.47 lakh crore AGR dues that the companies face. Of this, Vodafone Idea owes Rs 33,989 crore to the government and Airtel, Rs 35,588 crore.

Earlier in the day, telecom minister Ravi Shankar Prasad told the Lok Sabha that the government was currently not considering a waiver on penalties and interest on unpaid licence fees or extending the three-month deadline for paying those.

In her briefing, Sitharaman said the deferred amounts would need

to be equally spread over the remaining instalments to be paid by the carriers, without any increase in any existing time period specified for making the payments.

"The interest is stipulated while auctioning the concerned spectrum will, however, be charged so the NPV (net present value) remains intact," she said. Telecom companies opting for the two-year deferred payment must furnish revised bank guarantees for the instalments to be paid starting FY23.

The decision for deferring spectrum payment instalments will be implemented within a fortnight, the government said in a statement. The Department of Telecommunication will give an option to the telecom service providers to defer the payment of the spectrum auction instalments due for 2020-21 & 2021-22, either for one or both years, it added.

Deferment of spectrum auction instalments will ease the cash outflow of the stressed companies and facilitate payment of statutory liabilities and interest on bank loans, it said, adding that continued operation by the operators would give a fillip to employment and economic growth.

Shares of Vodafone Idea closed nearly 17.5% higher at Rs 7.07 on the BSE Wednesday, while those of Airtel dipped by 0.4% to 437.25. Shares of Reliance Industries — Reliance Jio's parent — closed 8.5% higher at Rs 1,547.05. The government's announcement came late in the day.

"We've come to expect that the government moves incrementally so we really appreciate that the government has considered one of our early requests... it certainly helps with the cash flow situation," Rajan Mathews, the director-general of the Cellular Operators Association of India, told ET.

He hoped that the panel of secretaries would continue to look at the other requests that the industry had made, including reduction in levies and taxes.

He said the government already had legal opinions from senior lawyer Harish Salve and former SC judge AK Sikri, who had said the Centre had the right to waive penalties and interest from the AGR dues, and also extend the timeline for payment.

A senior government official, however, said the AGR dues were a legal issue and the three-month timeline to pay the dues was fixed by the court, and that any extension or calibration had to be done under court direction.

"The telcos very well knew the liability they were contesting in the court proceedings. Why did they not make the contingency provisions in their books of accounts since 2011? Surely this elementary accounting procedure was not unknown to them," the official said.

He, however, added that the government won't allow a monopoly in the sector.

The official said that the telcos would meet in the next few days to discuss more ways of restoring the profitability of the sector, including discussions around tariff hikes.

"It (the moratorium) is not enough for the telcos to address their near-term concerns, particularly pertaining to AGR payouts. This was a good opportunity for the government to revisit licence fee and SUC, though this can still be relooked at a later stage," said Ravi Sharma, head of research at SBICap Securities.

• **TRAI's regulations on wireless to wireless Domestic Call Termination Charges**

COAI highlighted the regulations as a welcome step in the right direction as it has always maintained that in a CPP (Calling Party Pays) format that we follow in India, there should always be cost based IUC, in line with global practice. We look forward to continuing support from the government and regulator to address the severe financial stress in the telecom sector.

By Mail Today Bureau
in New Delhi

THE TELECOM regulatory authority of India (Trai) on Tuesday postponed by a year the move to implement the zero-interconnect usage charges (IUC) regime that was scheduled to come into effect from January 2020, giving some relief to loss-making telcos Vodafone Idea and Bharti Airtel.

"For wireless to wireless domestic calls, termination charge would continue to remain 6 paise per minute up to December 31, 2020. From January 1, 2021, onwards the termination charge for wireless to wireless domestic calls shall be zero," the Trai said in a press release on Tuesday.

The interconnect charge is paid by the telco from which the call originates to the rival telco on which the call terminates.

Trai's regulation is a relief for older carriers Vodafone Idea and Sunil Mittal-led Bharti Airtel, which have run into heavy losses, and wanted the implementation of the BAK (bill and keep) or zero-termination charge regime postponed as they are net interconnect revenue earners. Mukesh Ambani-run Reliance Jio Infocomm, on the other hand, which is a net payer, had opposed postponing the move to a zero fee regime.

Telecom industry body COAI sees it as a relief for the debt-ridden sector and expects that continuing with six paise mobile call termination charge will not have any impact on consumers as telcos have already absorbed this charge in their recently increased mobile call and data rates.

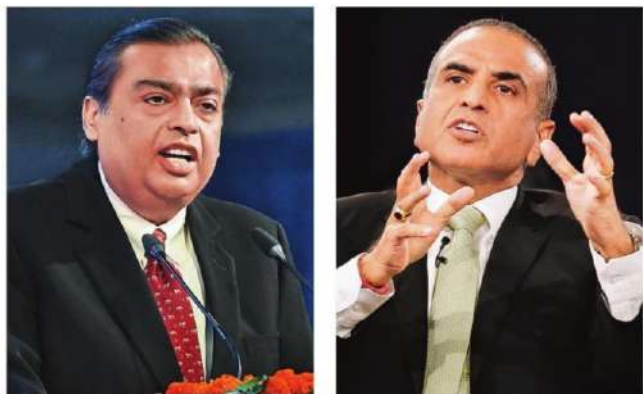
RELIANCE Jio had started levying 6 paise extra per minute for calls made outside its network, while Trai was working on reviewing the IUC fees. The company rolled out new plans from December 6.

Trai said, "It may not be advisable to implement BAK from January 1, 2020, keeping in view inadequate adoption of 4G technologies by consumers and asymmetries in traffic. Sticking to the earlier BAK deadline "may affect the level playing field amongst service providers, and in turn, effective competition in the market," it added.

Further, it said, in the capital-intensive telecom sector which has a long gestation period, and where entry of new service providers in the short run is difficult, maintaining effective competition amongst service providers is necessary for ensuring affordable services to consumers.

Trai defers zero fee plan on call links

Airtel, Vodafone Idea get some relief



WAR OF ATTRITION: Reliance Jio chairman Mukesh Ambani and Airtel chairman Sunil Mittal.

MOVE ON FLOOR RATES

TELECOM regulator Trai on Tuesday initiated a consultation to fix minimum or floor rates for mobile phone calls and data, a move aimed at scaling down the cut-throat price war that has landed telcos in huge losses.

Trai reversed its earlier stand of not getting into fixing of tariffs and issued a consultation paper on minimum rates. Bharti Airtel had been in the lead for demanding floor rate for the viability of the sector that had seen margins erode in competing with free voice calls and dirt cheap data from new entrant Reliance Jio. Trai said comments on floor tariffs are invited by January 17.

Relief for Voda Idea, Airtel as Trai defers scrapping IUC levy

Navadha Pandey
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NEW DELHI



The telecom regulator on Tuesday deferred by a year its plan to scrap a levy charged by operators for handling incoming calls from rival networks, offering relief to older telcos that generate a part of their revenue from interconnect usage charges (IUC).

The Telecom Regulatory Authority of India (Trai) will now scrap IUC from 1 January 2021 instead of next month. As a result, operators will continue to earn 6 paise a minute for every mobile call they receive on their networks till 31 December 2020.

The regulator has changed its stance about two years after it decided to scrap the levy from 1 January 2020, a move that older telcos Vodafone Idea Ltd and Bharti Airtel Ltd claimed favoured newer entrant Reliance Jio Infocomm Ltd because its outgoing voice traffic was much higher than incoming. Scrapping IUC would benefit an operator with more outgoing traffic.

Telcos will continue earning 6 paise a minute for every mobile call they receive on their networks till 31 Dec 2020

Trai will scrap IUC from 1 Jan 2021 instead of next month.

A zero IUC, or bill and keep, regime means operators would not make any money for receiving calls on their networks. If the traffic flow among operators is symmetrical, it will not have a negative impact on any operator as it is simply a charge paid by one operator to another.

"Trai regulation to maintain IUC at the current 6p/min for a year is along expected lines and provides the most short-term relief to Vodafone Idea,

while Jio would see a temporary adverse impact," IIFL-CAP, a division of IIFL Securities Ltd, said in a note on Tuesday. "The extension of the IUC regime is a positive for Vodafone Idea from a near-term perspective—in line with the

TURN TO PAGE 5

TRAI puts off zero-IUC regime by a year to Jan 2021

Relief for Voda-Idea, Airtel as 6 paise/minute termination charge extended till Dec 31, 2020

OUR BUREAU

New Delhi, December 17

From January 1, 2021, the termination charge for wireless-to-wireless domestic calls shall be zero, the Telecom Regulatory Authority of India (TRAI) said on Tuesday, while issuing regulations on 'Domestic Call Termination Charges'.

The Interconnection Usage Charges (IUC) of 6 paise per minute on mobile calls will continue till December 31, 2020, the sector regulator said.

This should come as relief to Vodafone Idea (VIL) and Bharti Airtel, which had wanted the zero-IUC regime put off because neither earns a significant proportion of revenue via IUC. However, Mukesh Ambani

owned Reliance Jio had opposed any deferral as more than 60 per cent of its total traffic is outgoing.

TRAI's original deadline to phase out IUC was January 1, 2020. In September, it undertook a review of the same and its consultation paper mentioned that the progress of VoLTE adoption has been slower than expected, suggesting that it may keep the IUC regime going for some more time.

"For wireless-to-wireless domestic calls, termination charge would continue to remain as six paise per minute up to December 31, 2020. From January 1, 2021 onwards, the termination charge for wireless-to-wireless domestic calls shall be

zero," it said in the notification. Domestic termination charges are the wholesale charges payable by a telecom service provider (TSP) whose subscriber originates the call to the TSP in whose network the call terminates.

According to analysts tracking the sector, the extension of the IUC regime is a positive for Vodafone-India from a near-term perspective—in line with the government's stance of ensuring VIL's financial viability.

VIL's net IUC receipts in the second quarter of this year were ₹300 crore (28 per cent of Ebitda) and Bharti's estimated IUC receipts were ₹200 crore (7 per cent of India mobile Ebitda). But Jio's net IUC payout was ₹650 crore (13 per cent of its Ebitda) in the second quarter this year.

So, Jio's net IUC payouts and



Domestic termination charges are the wholesale charges payable by a telecom service provider (TSP) whose subscriber originates the call to the TSP in whose network the call terminates. REUTERS

VIL's net IUC receipts have both fallen by around 35 per cent in the past six months, which is a manifestation of Jio's rising market share and improving minutes mix.

"Therefore, if TRAI had persisted with the IUC for more than a year, quite likely that Jio

would have become a net IUC earner with the older telcos turning net IUC payers based on the above improvement in the minutes mix. TRAI plan of eliminating IUC from January 1, 2021 largely rules out this possibility," an industry analyst said.

According to the industry body Cellular Operators Association of India (COAI), there should always be cost-based IUC.

"COAI has always maintained that in a CPP (Calling Party Pays) format that we follow in India, there should always be a cost-based IUC, in line with global practice. We look forward to continuing support from the government and the regulator to address the severe financial stress in the telecom sector," Rajan S Mathews, Director-General, COAI, said.

• **COAI's statement on TRAI's Consultation Paper on Floor Price**

COAI supported the Consultation Paper issued by TRAI on floor pricing. Tariff correction is necessary for improving the financial health of the industry. The only option available is for the Regulator to intervene and correct the anomalous pricing situation prevailing in the market place. The regulation on this issue by the Regulator will ensure that the Telecom industry remains healthy and robust, there is orderly competition and above all, the resources are available with TSP's to enhance QoS and expansion of networks to achieve the vision of Digital India.

Telecom industry seeks floor price to relieve sectoral stress

The COAI has requested that a moratorium of three years be provided "followed by a payment tenure of 15 years at a simple interest of six per cent"

JONATHAN ANANDA @ New Delhi

THE telecom sector has renewed attempts to secure a relief package from the union government with the Cellular Operators Association of India (COAI) writing to the Department of Telecom (DoT) seeking the offset of GST credits against AGR dues and an extended period of time to pay off the rest. It has also sought a floor tariff for telecom services as well as renewed requests to slash levies like license fees and spectrum usage charges.

According to official sources, the Digital Communications Commission (DCC) is slated to meet on Friday to consider possible relief measures. However,

sources also note that such relief measures will likely be contingent on telecom service providers paying up pending dues as directed by the Supreme Court (SC).

Adjusted gross revenue (AGR) is the basis on which levies like license fees and spectrum usage charges (SUC) are calculated and the SC had ruled last year that this should include proceeds from licence-holders' non-telecom businesses too.

"As individual companies are stretching to make as much payment as is possible in a stressed financial situation, the following credit due to us from the government, if adjusted, can help companies meet AGR



payment," wrote COAI director-general Rajan Mathews, seeking the setting off of GST dues. Vodafone Idea (VIL) has claimed ₹8,000 crore in GST credits currently lying with the

government. The COAI has also requested that a moratorium of three years be provided "followed by a payment tenure of 15 years at a simple interest of 6 per cent". "The government

Vodafone Idea wants 7-8 times hike in tariffs

Vodafone Idea has demanded fixing minimum tariffs for mobile data at ₹35 per GB, around 7-8 times of current prices, and for calls at 6 paise per minute along with monthly charges from April 1 to enable it pay statutory dues and make its business sustainable. It is under pressure to clear adjusted gross revenue dues of over ₹50,000 crore to comply with a SC order.

may consider granting loan equal to the AGR amount at 6%... If the dues were to be settled immediately, Mathews added. As for a floor price, Mathews noted that the sector's average

revenue per user was the lowest among comparable economies at just ₹108-128, compared to China (₹504), Brazil (₹405) and Russia (₹333). "We believe that despite the introduction of a floor price, ARPU in India will remain extremely competitive... floor pricing is imperative to ensure the sector is sustainable, and in a position to bear the deferred spectrum and AGR dues, while continuing to invest in world class networks and services," Mathews said.

The COAI reiterated requests to reduce license fees to 3 per cent from 5 per cent, SUC by 3 per cent, a GST waiver on sovereign payments and reviewing the need for bank guarantees. Out of the ₹1.47 lakh crore

pending dues, Vodafone Idea, Bharti Airtel and Tata Teleservices owe ₹30,038 crore, ₹35,596 crore and ₹13,023 crore respectively, according to DoT estimates. After the SC pulled up both the government and the telcos for non-compliance with its order to pay up by January 23, Bharti Airtel, Vodafone Idea and the Tata group have paid ₹10,000 crore, ₹3,500 crore and ₹2,197 crore respectively.

While Airtel has promised more payments before the next hearing on March 17, VIL has sought relief in order to pay the rest without declaring insolvency. VIL has also written a letter to the DoT seeking relief measures similar to those set out by the COAI.

● **CONSULTATION PAPER**

Trai moves to fix floor price for telecom tariffs

To look for a methodology to fix floor price for data, voice services and bundled offers

FE BUREAU
New Delhi, December 17

THE TELECOM REGULATORY Authority of India (Trai) on Tuesday came out with a consultation paper on setting a floor price for telecom tariffs. The paper comes after industry body COAI urged the regulator to fix a floor price for data services. Trai has come out with a list of 19 questions wherein it wants to know what could be the methodology to fix floor price for data and voice services as well as bundled offers. The regulator also wants to know if there should be a floor ceiling also, so that interest of consumers could be safeguarded.

COAI had written that tariff correction in the current level of fierce competition was not possible by any service provider voluntarily and thus the only option available is prescription of a minimum tariff for mobile data service by the Authority. "At the same time, the Authority would be aware that unlike mobile data, voice services are considered as essential services

'5G trials to start in Q4FY20'

THE 5G TRIALS are expected to begin in the last quarter of the current fiscal, and the government has neither approved nor rejected any applicant so far, a senior telecom department official said on Tuesday. Asked if the government has taken a decision on Huawei's participation, the official said that 12 applications have been received for 5G trials and that it has not rejected or approved any proposal so far. "The 5G trials will start in the last quarter of the current financial year," the official said.

Another senior government functionary said that any proposal on 5G must address twin considerations — first adoption of new technology, and imperatives of



national security. The official said that 5G should not be linked to general spectrum auctions — which is expected to take place in March-April next year.

The technology for 5G is yet to evolve, and major global players are themselves in the process of evaluating the ecosystem and use cases for 5G. It has phenomenal potential of speed and futuristic applications, the official added. — PTI

especially by the subscribers at bottom of the pyramid and, therefore, would need to be continued under the present forbearance regime," Rajan Mathews, director general, COAI, had written to Trai.

Currently, tariffs are under forbearance, which means that operators are free to fix and implement them without any prior nod from the regulator.

The Trai said that the department of telecommunications (DoT) has also forwarded repre-

sentations received by it from telecom operators regarding various issues including demand from some telcos seeking floor tariff fixation by the regulator/government. The three private operators have announced tariff revision from December 3 and 6, and hikes range from 15% to 50%.

Traditionally, the Indian telecom sector has been voice driven but over the past couple of years, the sector has become data-centric. Over the past few

months, Trai said, there have been reports and industry representations indicating that telecom sector is going through a phase of turbulence, with intense competition and pricing pressures leading to a decline in revenues and profitability.

Trai in 2012 had floated a consultation paper in 2012 seeking comments on review of forbearance regime and desirable tariff regime for data services. At the time, it was decided that forbearance in tariffs should continue. The policy of forbearance in telecom tariffs was again reviewed by Trai in 2017 when a few operators were of the view that there should be some form of floor price in the tariffs so that the possibility of predatory pricing could be avoided. After detailed discussions, it was decided that forbearance should continue for tariffs.

Floor price implies setting a price below which no telecom operator can offer its services. As it is a difficult and complicated decision, regulators generally avoid it as it is considered anti-competitive and anti-consumer. The revenue per minute of outgoing call has decreased to 13 paise in June 2019 from 49 paise in June 2016. Similarly, the average data cost to subscriber per GB has decreased to ₹11.78 in 2018 from ₹268.97 in 2014.

Trai moves to fix floor price

THE TELECOM Regulatory Authority of India (Trai) on Tuesday came out with a consultation paper on setting a floor price for telecom tariffs. The paper comes after industry body COAI urged the regulator to fix a floor price for data services. The telecom regulator has come out with a list of 19 questions. Detailed report on Page 4

• **COAI's statement Supreme Court's order to dismiss the review petition of AGR matter**

COAI expressed its disappointment the Hon'ble Supreme Court's order dismissing the industry's review petition of AGR matter. The Supreme Court's dismissal of the review petition is the last straw in contributing to financial distress and it remains to be seen whether the industry will be able to recover from this setback.

AGR plea dismissal may hit 'Digital India'

Apex court's decision to take a toll on telecom companies' fund-raising, investment capabilities

YUTHIKA BHARGAVA
NEW DELHI

With the Supreme Court dismissing the petition by telecom firms to review its October 24 order on definition of adjusted gross revenue (AGR), industry and experts said that the decision would hit the fund-raising and investment capability of service providers, leading to adverse impact on the NDA government's flagship 'Digital India' initiative.

Expressing disappointment over the decision, Bharti Airtel on Thursday said it was evaluating the possibility of filing a curative petition. The firm added that the money required to pay the interest and penalties on the pending dues, could instead be used for serving the 'Digital India' initiative.

Prashant Singhal, global technology, media and tele-



Dimming prospects: The payment will impact the larger value chain, including tower firms, say analysts. ■ K. K. MUSTAFAH

communications (emerging markets) leader at EY told *The Hindu*, "This is a big blow... while there is still some hope with the option of filing a curative petition, the sooner the uncertainty is positively resolved, the bet-

ter it is for the sector." Mr. Singhal added that the sector needed funds for upcoming technologies such as 5G and this decision would impact telecom companies' fund raising and investment capabilities. "This will also

impact the larger telecom value chain, including the tower firms and the equipment makers, and not just the telcos," he said.

"While respecting the Hon'ble Supreme Court's decision, we would like to express our disappointment as we believe the long standing disputes raised regarding the AGR definition were bonafide and genuine," Bharti Airtel said in a statement.

"The money now required to pay punitive interest, penalty and interest on penalty, which forms nearly 75% of AGR dues, would have better served the digital mission of the country," it said.

'Exploring options' Vodafone Idea, whose chairman Kumar Mangalam Birla had earlier said that the company may have to shut shop if there was no relief on the

AGR dues, informed the stock exchange that it was exploring further options, including filing a curative petition.

"The sector, which is currently reeling under a debt of ₹4 lakh crore, is a key contributor to the Indian economy... The sector is already facing heavy taxes and levies in the range of 29% to 32%, which are globally the highest," Rajan S. Mathews, director general at Cellular Operators Association of India said. "The Supreme Court's dismissal of the review petition is the last straw in contributing to financial distress and it remains to be seen whether the industry will be able to recover from this setback. The added pressure on the sector will also adversely impact Prime Minister Narendra Modi's vision of Digital India," he added.

HUGE BLOW TO TELECOM COS

SC Hangs up on Telcos' AGR Review Petitions

Distress Call

WORST-HITELCOS
Airtel (₹1,00,000 Cr)
Vodafone Idea (₹3,000 Cr)
Idea (₹1,000 Cr)
Tata (₹1,000 Cr)

AGRIE IMPACTED
Non-telecom firms get exempted from AGR. They may file review petitions at SC. Rallied industry.

AGRIE IMPACTED
Largely by 5G. Vendors, tower firms, tower providers.

AGRIE IMPACTED
Consumers may see multiple hikes in bills.

OUR BUSINESS
New Delhi | Mumbai | Kolkata: The Supreme Court rejected pleas by Vodafone Idea, Bharti Airtel and Tata Telecommunications to review the October 24 order that widened the definition of adjusted gross revenue (AGR), leaving the three telcos with billions of dollars more than ₹100 billion in additional tax and interest. "Having perceived the review petitions and the concerned papers with confidence, we do not find any justification for..."

'Ball in Govt's Court'

...from Page 1

"This, after the industry's review petition, but that now we have to see how the government reacts to this," said Tarun Mehta, partner, KPMG & Co. "A review petition option may be explored, but it is not a sure thing. It is a matter of interest, not of legal interest on grounds."

Lawyer Mohan Agarwal of All India Bar Council and Bharti Airtel said the industry is not sure if the government will accept the review petition. "The government is not sure if it will accept the review petition," he said. "The government is not sure if it will accept the review petition."

Some non-telecom firms, including tower firms, are also affected by the decision. "The decision will impact the tower firms, which are also affected by the decision," said Tarun Mehta. "The decision will impact the tower firms, which are also affected by the decision."

The decision will impact the tower firms, which are also affected by the decision. "The decision will impact the tower firms, which are also affected by the decision," said Tarun Mehta. "The decision will impact the tower firms, which are also affected by the decision."

एजीआर पर नहीं मिली राहत

सर्वोच्च न्यायालय ने खारिज की भारती और वोडाफोन आइडिया की समीक्षा याचिका

बकाया समायोजित सकल राजस्व (एजीआर) पर शीर्ष अदालत के फैसले पर भारती एयरटेल और वोडाफोन आइडिया द्वारा दायर समीक्षा याचिका को सर्वोच्च न्यायालय ने आज खारिज कर दिया। इससे पहले अदालत ने 23 जनवरी तक दूरसंचार कंपनियों को 1.47 लाख करोड़ रुपये का बकाया एजीआर चुकाने का आदेश दिया था।

न्यायमूर्ति अरुण मिश्रा, न्यायमूर्ति एसएन और न्यायमूर्ति एसआर साह के पीठ ने कहा समीक्षा याचिका को खारिज करते हुए कहा कि यह सुनवाई के लिए पात्र नहीं है। एजीआर सेवा प्रदाताओं का राजस्व होता है, जिसमें गैर-मुख्य दूरसंचार परियोजनाओं जैसे विरासत, सामाजिक और व्याज आय शामिल होते हैं। यह केवल दूरसंचार सेवाओं से प्राप्त आय नहीं है। अदालत के आदेश से निराश भारती एयरटेल ने कहा कि वह सुधारत्मक याचिका दायर करने पर विचार कर रही है, जो अदालत में शिकायत निपटान का अंतिम उपाय है। भारती एयरटेल ने कहा, "उद्योग भारी वित्तीय दबाव में है और अदालत के

बढ़ेगी मुश्किल

- दूरसंचार कंपनियों को बकाया एजीआर मद् में 1.47 लाख करोड़ रुपये का करना है भुगतान
- भारती एयरटेल सुधारत्मक याचिका दायर करने पर कर रही विचार

फैसले से पूरे क्षेत्र की व्यवस्थापता पर और संशय खड़ा होगा। उद्योग को नेटवर्क के विस्तार, सेक्टर खरीदने और 5जी जैसे नई तकनीकों पर निरंतर निवेश करने को जबरन है।

24 अक्टूबर को शीर्ष अदालत ने केंद्र सरकार को एजीआर की परिभाषा को सही ठहराया था। इसे लेकर दूरसंचार विभाग और दूरसंचार सेवा प्रदाताओं के बीच लंबे समय से विवाद चल रहा था। सेल्युलर ऑपरेटर्स एसोसिएशन ऑफ इंडिया (सीओएआई) ने एजीआर की गणना के लिए एजीआर की परिभाषा को चुनौती देते हुए 2005 में पहला

मामला दायर किया था। उसकी दलील थी कि सरकार एजीआर में त्रिज चक्रों को शामिल करने को कोशिश कर रही है वे टेलीग्राफ ऐक्ट और भारतीय दूरसंचार विधायक प्राधिकरण (ट्राई) की विधायकों के अनुरूप नहीं हैं।

दूरसंचार उद्योग दूरसंचार विभाग द्वारा मांगी गई राशि के 85 फीसदी हिस्से का भुगतान कर चुका है लेकिन शेष 15 फीसदी राशि पर लंबे समय से विवाद चल रहा है। इसको बचव यह है कि दूरसंचार कंपनियों को दूरसंचार विवाद निपटान एवं अपील पंचायत, उच्च न्यायालयों और यहां तक कि उच्चतम

न्यायालय से भी अनुकूल फैसला मिल रहा है। दूरसंचार कंपनियों पर सरकार का 92,641 करोड़ रुपये का बकाया है। इसमें 23,189 करोड़ रुपये विवादित शारदात्मक मांग, 41,650 करोड़ रुपये ब्याज, 10,923 करोड़ रुपये जुर्माना और 16,878 करोड़ रुपये जुमाने पर ब्याज शामिल है। अगर इसमें लाइसेंस फीस और स्पेक्ट्रम उपयोग शुल्क को भी शामिल कर लिया जाए तो यह राशि 1.47 लाख करोड़ रुपये पहुंच जाएगी। एयरटेल की गणना एजीआर पर की गई है। दिसंबर में वोडाफोन आइडिया के नेयरमैन कुमार भोपाल सिंहला ने कहा था कि उच्चतम न्यायालय के आदेश के बाद अगर उनकी कंपनी को सरकार की तरफ से राहत नहीं मिलती तो वह बंद हो जाएगी। कंपनी को सरकार को 40 हजार करोड़ रुपये का भुगतान करना है। वोडाफोन आइडिया को एजीआर के बकाये के भुगतान का प्रबंधन करने के बाद विवाद निपटारी में 50,922 करोड़ रुपये का शुद्ध घाटा हुआ था जो भारत के कॉन्सॉलिडेटेड इतिहास में सबसे बड़ा घाटा है। एयरटेल को भी विलंब में समाप्त निमाहों में 23,044 करोड़ रुपये का शुद्ध घाटा हुआ था। उसने एजीआर बकाये के लिए 28,540 करोड़ रुपये का न्यायालयों और यहां तक कि उच्चतम

• **COAI hosted 3GPP and GCF meetings on global telecom standards and device certifications**

COAI along with Indian Friends of 3GPP (IF3) hosted the meetings of working groups of 3GPP and Global Certification Forum (GCF) in Hyderabad during 13th January to 17th January. These meetings provide a good platform and exposure to Indian Government officials, academia and other key stakeholders in India to participate in the discussions on development of global telecom standards and certification requirements for the deployment of 5G globally. COAI along with IF3 and the 5G India Forum (5GIF) are playing a key role and putting significant efforts in bringing global standards discussions to India.

भारत में 5G सेवा जल्द शुरू करने के लिए COAI ने की हाई लेवल मीटिंग

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भारत में 5G के डिप्लॉयमेंट के लिए ग्लोबल स्टैंडर्ड और डिवाइस के लिए सर्टिफिकेशन रिक्वायरमेंट के बारे में भी चर्चा की गई.

नई दिल्ली, टेक डेस्क। COAI यानि की सेल्युलर ऑपरेटर्स एसोसिएशन ऑफ इंडिया ने 3GPP (थर्ड जेनरेशन पार्टनरशिप प्रोजेक्ट) के सहयोगियों और ग्लोबल सर्टिफिकेशन फोरम के साथ बैठक आयोजित की। इस बैठक में 5G के लिए ग्लोबल स्टैंडर्ड और डिवाइस सर्टिफिकेशन की प्लानिंग की गई। हैदराबाद में इस बैठक का आयोजन 13 जनवरी से लेकर 17 जनवरी के बीच किया गया। इस मीटिंग में भारत सरकार के अधिकारी अकेडमिया और अन्य की स्टेक होल्डर्स ने पार्टिशिप किया। इसमें भारत में 5G के डिप्लॉयमेंट के लिए ग्लोबल स्टैंडर्ड और डिवाइस के लिए सर्टिफिकेशन रिक्वायरमेंट के बारे में भी चर्चा की गई। इसमें इन स्टेक होल्डर्स के अलावा 5GIF (5G इन इंडिया फोरम) ने भी हिस्सा लिया।

COAI hosted 3GPP and GCF meetings on global telecom standards and device certifications

13 January 23, 2020 • techmster • 0 Comments

COAI along with Indian Friends of 3GPP (IF3) hosted the meetings of working groups of 3GPP and Global Certification Forum (GCF) in Hyderabad during 13th January to 17th January 2020. These meetings provide a good platform and exposure to Indian Government officials, academia and other key stakeholders in India to participate in the discussions on development of global telecom standards and certification requirements for the deployment of 5G globally. COAI along with IF3 and the 5G India Forum (5GIF) are playing a key role and putting significant efforts in bringing global standards discussions to India.



• **5G India Forum at the ITU meeting submits cutting edge reporting of new 5G radio technologies**

The final report of the 5G India Forum Independent Evaluation Group (5GIF IEG) states that operators are empowering consumers with the power to check and opt for technologies that meet a minimum technical performance requirement in an era of 5G spectrum. A significant outcome of this effort was that an industry-grade simulator that was built for the purpose of evaluation and that can now be leveraged for future technology studies in India.

5जी रेडियो प्रौद्योगिकी की अत्याधुनिक रिपोर्टिंग पेश

नई दिल्ली, जेएनएन। भारत में दूरसंचार ऑपरेटर्स ने नवीनतम प्रौद्योगिकी में सतत निवेश के साथ उपभोक्ताओं को सर्वोत्तम सेवाएं उपलब्ध कराने की अपनी प्रतिबद्धता दोहराई है। 5जी इंडिया फोरम स्वतंत्र आकलन समूह (5जीआईएफ आईईजी) की अंतिम रिपोर्ट में कहा गया है कि ऑपरेटर 5जी स्पेक्ट्रम के युग में एक न्यूनतम तकनीकी निष्पादन आवश्यकता पूरी करने वाली प्रौद्योगिकियों का पता लगाने और उन्हें अपनाने की ताकत के साथ उपभोक्ताओं को सशक्त कर रहे हैं। इस प्रयास का एक महत्वपूर्ण परिणाम यह है कि मूल्यांकन के उद्देश्य से एक उद्योग ग्रेड का सिमुलेटर बनाया गया जिसका उपयोग भारत में भावी प्रौद्योगिकी के अध्ययन के लिए किया जा सकता है। जहां 5जीआईएफ आईईजी का प्राथमिक उद्देश्य आईटीयू परिभाषित रूपरेखा में कैडिडेट प्रौद्योगिकियों का मूल्यांकन करना है।

5जी इंडिया फोरम ने आईटीयू बैठक में नयी 5जी रेडियो प्रौद्योगिकी की अत्याधुनिक रिपोर्टिंग प्रस्तुत की

नयी दिल्ली। भारत में दूरसंचार ऑपरेटर्स ने नवीनतम प्रौद्योगिकी में सतत निवेश के साथ उपभोक्ताओं को सर्वोत्तम सेवाएं उपलब्ध कराने की अपनी प्रतिबद्धता दोहराई है। 5जी इंडिया फोरम स्वतंत्र आकलन समूह (5जीआईएफ आईईजी) की अंतिम रिपोर्ट में कहा गया है कि ऑपरेटर 5जी स्पेक्ट्रम के युग में एक न्यूनतम तकनीकी निष्पादन आवश्यकता पूरी करने वाली प्रौद्योगिकियों का पता लगाने और उन्हें अपनाने की ताकत के साथ उपभोक्ताओं को सशक्त कर रहे हैं। इस प्रयास का एक महत्वपूर्ण परिणाम यह है कि मूल्यांकन के उद्देश्य से एक उद्योग ग्रेड का सिमुलेटर बनाया गया जिसका उपयोग भारत में भावी प्रौद्योगिकी के अध्ययन के लिए किया जा सकता है। 5जी इंडिया फोरम (5जीआईएफ) की स्थापना

सीओआईएफ के तत्वावधान में किया गया जिसका लक्ष्य अगली पीढ़ी के संचार के विकास में अग्रणी बल बनना है और यह राष्ट्रीय प्रयासों में समन्वय स्थापित करेगा और भारत में 5जी परिवर्तन के वाणिज्यिक और नियामकीय विकास के साथ ही स्पॉन्सित बनने में एक महत्वपूर्ण भूमिका निभाएगा। जहां 5जीआईएफ आईईजी का प्राथमिक उद्देश्य आईटीयू परिभाषित रूपरेखा में कैडिडेट प्रौद्योगिकियों का मूल्यांकन करना है, सीओआईएफ ने आईईजी को उजीपीपी मानक आपूर्ति प्रौद्योगिकियों (जिसमें दो दशक से अधिक समय तक सफलतापूर्वक निर्वाह कनेक्टिविटी टी और ब्याक स्तर पर बाजार को अंगीकार करने की सुविधा दी) का व्यवहार अब एनडीसीपी 2018 द्वारा तय स्थलों को कैसे पूरा कर रहा

है, इसका पता लगाने का काम सही है। इस संघर्ष में हमने कई अतिरिक्त परिदृश्यों पर मूल्यांकन नहीं करेंगे, इसलिए यह है जो वास्तव में भारतीय नेटवर्क को स्थानांतरण को परिष्कृत करते हैं। 5जी इंडिया फोरम (5जीआईएफ) का हिस्सा 5जीआईएफ आईईजी नए 5जी (जिसे आईएसटी-2020 के तौर पर भी जाना जाता है) कैडिडेट रेडियो प्रौद्योगिकियों के मूल्यांकन के लिए पंजीकृत स्वतंत्र मूल्यांकन समूह है। इसका मकसद 5जी के लिए भारतीय दूरसंचार नेटवर्क स्थापित करने के उद्देश्य से इन प्रौद्योगिकियों का मूल्यांकन करने के लिए किया गया। इस समूह में दूरसंचार ऑपरेटर, ओईएम, विश्वविद्यालय और एक सामूहिक तौर पर भागीदारी करने वाले व्यक्तिगत विशेषज्ञ शामिल हैं।

• **COAI's statement on Call Data Record**

This was carried by news wire agency PTI and further published in *The Hindustan Times*, *The Economic Times*, *Mint*, *Hindustan Times*, etc. Additionally, it was also covered in leading portals such as *The Economic Times*, *Business Standard*, etc.

Data was sought to fix call drops: DoT

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NEW DELHI: A day after the emergence of a letter written by the Cellular Operators' Association of India (COAI) to telecom secretary Anshu Prakash, which expressed concern over the Department of Telecommunications (DoT) seeking call data records in bulk, DoT clarified on Wednesday that the data had been sought to improve network quality and fixing call drops.

The government ruled out surveillance as the motive. The ripples of the move were felt in Parliament as the Congress brought adjournment motions in the Lok Sabha. The Congress alleged that the Centre's move was an infringement of the Right to Privacy as "guaranteed by the Supreme Court in a 9-0 judgment".

The February 12 letter written by the head of the COAI, Ranjan Mathews, to telecom secretary Anshu Prakash had said, "It is most respectfully submitted that in all such requests as well as ad hoc bulk CDR details sought by various state units of DoT, neither the intended purpose for requirement of CDRs is mentioned nor the identity of the subscriber. Further CDRs sought for specific areas may lead to allegations of surveillance, especially in the state like Delhi having numerous VIP areas having offices and residences of ministers, MPs, judges etc."

The Centre issued a clarification that the requests for bulk CDRs was to "identify in a more scientific and innovative manner, the specific problem areas and routes where call drops occur". The government statement said the DoT had developed in-house software which needed bulk CDR data.

A COAI official said on condition of anonymity that telecom operators were bound by the Supreme Court guidelines to anonymous call data records and it was a lawful interception that was done by one of the authorised agencies. However, he said that it was very difficult to anonymise CDRs that were sought by the government. For instance, the note to Prakash said that the entire call details of February 23 and were sought by the government on certain routes in Delhi. "This will involve millions of calls and very difficult to pull them out," said the COAI official.

The government note clarified that it was for "accumulation of call drops in specific areas. For this purpose, total data of calls made during any particular time period from the identified cellphone tower locations from where the complaints are received is collected to enable analysis".

It added, "these data are anonymous and don't contain names of either the maker or receiver of calls. Only if any call is terminated within 30 seconds and the same number is again dialed immediately, such calls are added to arrive at the final figures of call drops."

The COAI responded to the government's clarification, and maintained that it was willing to cooperate.

"The data sought from the service providers are as per the provision of rules and as per the due process stipulated in the Self Standard Operating Procedure," said Mathews.

DoT explains position on seeking call details

HT Correspondents
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The February 12 letter written by the head of the COAI, Ranjan Mathews, to telecom secretary

SC PULLS UP TELCOS, CENTRE ON AGR SELF-ASSESSMENT

NEW DELHI: The Supreme Court on Wednesday shot down a telecom ministry directive that allowed operators to reassess their adjusted gross revenue (AGR) dues and asked the government to stick to its original demand for ₹1.99 lakh crore, dealing a further blow to India's struggling telcos.

Reprimanding the department of telecommunications (DoT) for allowing self-assessments—which turned out to be far lower than government estimates—the bench headed by justice Arun Mishra said, "They think they are more superior than us? Who is this gentleman who has allowed self assessment?"

The court, however, said it will hear arguments on the government's petition to allow companies to make staggered payments, likely after two weeks.

Anshu Prakash said call record data (CDR) sought for specific routes may lead to "allegations of surveillance", especially in places like Delhi where many high-profile people live.

The Centre issued a clarification that the requests for bulk CDRs was to "identify in a more scientific manner, the specific problem areas and routes where call drops occur".

Telcos Agree with DoT, Say No Breach of Privacy in Sharing Call Data Records

DoT to use details to study poor network quality, call drops & cross connection complaints

Devina Sengupta
* timesgroup.com

Mumbai: The Department of Telecommunications (DoT) on Wednesday refuted allegations that call data records (CDRs) sought from carriers was a breach of privacy and amounted to surveillance, saying that the details will be used to study poor network quality, call drops and cross connection complaints.

Telcos, who had initially slammed the move to collect call records due to concerns over privacy, on Wednesday said they had understood the DoT's point of view and had cooperated with the department, given that the data shared did not violate privacy of subscribers.

"...this data is anonymous and does not contain names of either the maker or receiver of calls. There is no infringement of privacy of any person. No personal details are collected. There is no tracking of any phone number," said DoT in a statement on Wednesday.

DoT added that it will not access call content, names etc. of the subscribers. It termed the exercise as "an innovative way of identifying call drops and addressing the call drop issues. It will be appreciated that in the above exercise, there is no violation of privacy of any subscriber".

ET broke the story online on Wednesday that the DoT is building an in-house platform backed by big data analytics amid incessant complaints of poor quality and the government confirmed the same.

"To identify in a more scientific and innovative manner, the specific problem areas and routes where call drops occur, DoT has in house developed a software tool to analyse big data and accurately ascertain call drops in any area," the DoT said in a statement, adding that this was the reason for mass scale call records being sourced.

It said that big data analytics techniques can be used to identify calls which get disconnected within 30 seconds.

DoT's statement comes on the back of allegations that CDRs in large scale were against privacy norms and in fact, Cellular Operators Association of India (COAI), which represents private telcos, had raised the issue with DoT as well.

The COAI, in a letter sent in February, said neither the intended purpose of requirement of CDRs is mentioned nor the identity of the subscriber(s).

COAI
@ConnectCOAI

"COAI and @DoT_India are working together to ensure customers enjoy affordable and quality services", said Mr. Rajan S Mathews, @DGCOAI, @VnDIndia @airtelindia @Vodaldea_NEWS @reliancejio @TRAI @rsprasad #telcom

COAI-DoT to ensure customers enjoy affordable and quality... Various media reports have commented on a letter dated February 12, 2020 that COAI/ACT had written to Secretary, ... @voicendata.com

10:54 AM - Mar 19, 2020 · Twitter Web App

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12 Retweets 135 Likes

Events Participation

- **5G Huddle:** Wireless World Research Forum organised a 5G Huddle conference in different parts of the world annually. TSDSI partnered with WWRF hosted the 7th Annual 5G Huddle in New Delhi on 5-6 February 2020, along with Broadband India Forum and ITU APT Foundation of India. Theme of this edition was 5G as a Catalyst for Digital Transformation. It looked at the progress that has been made in the world's 5G journey, and more importantly the challenges that still remain in order for the long-term benefits of this truly transformational technology to be felt across all areas of society.



- **Voice & Data:** Telecom Leadership Forum: The focus was the importance of infrastructure that will propel the next generation network and will fuel the business growth for the enterprises. Government has to lay down the full proof plan to fuel the growth of telecom story, with no more job cuts, more into training & developments, new tax laws, industry friendly credit policy and many more.



- **National Broadband Mission:** Centre Government launched the National Broadband Mission to provide broadband access to all villages by 2022. It was launched by Telecom Minister Shri Ravi Shankar Prasad. The programme is a part of NDCP 2018.

- The workshop explored current issues in affordable access to communication and examines new trends, technologies, business models, and regulations that could contribute to affordable connectivity for all. The session also explored the latest issues in access technology, economics, business models, and regulations affecting affordable access.



- **The 18th Star Nite Awards 2019** amplified this development further by inviting industry stalwarts, who have been a witness to this trend to speak on topics around digital disruptions while also awarding the top vendors from the industry in different categories who have managed to digitally catapult their businesses to success.

- **Voice & Data:** India 5G Evolution: Voice & Data, Cybermedia, held an event on India 5G Evolution with business leaders from the telecom and government representatives. Pradeep Gupta, CMD, Cybermedia welcomed the guests. Sukanta Dey, Strategic Advisor & Group COO, Infromo Global Pte Ltd, gave the opening address. Keynote speakers were Aruna Sundararajan, Former Secretary, DoT, Government of India; Rajan Mathews, Director General, COAI and Jitendra Singh, Senior Director, Government Affairs, India & South Asia, Qualcomm India.



- **ET Telecom 5G Congress:** The focus was the 5G technology on the back of ultra-low latency communications is poised to bring the next wave of telecom disruption with an array of cross-industry applications becoming mainstream.



Media Visibility Snapshot 2019-20

We are faced with a new tech reality that comes with a promise of revolutionary change—5G. But it also comes amid some apprehensions, like the Sino-American trade war with focus on Chinese tech giant Huawei. **Ranjan Mathews, director-general of the Cellular Operators Association of India (COAI)—India's largest communication industry association—speaks to Pranay Sharma about the future of 5G in India and the Huawei controversy. Excerpts:**



How closely are you watching developments related to 5G technology, especially in the background of the ongoing tussle between the United States and China? We are definitely looking at 5G as India is keen on deploying it at the earliest. Some countries have already auctioned 5G spectrum. But the US situation will not have an effect on us; the Indian government will take an independent decision.

How is the industry feedback regarding it? Huawei has been in India for over 20 years and is working closely with all leading telcos. It's a known brand, credited with many firsts, including the first 5G network test last year. Huawei is suitably equipped to prepare the industry to build 5G capabilities. Huawei is backed by ground-breaking technology innovation which appeals to all. The problems it is facing are temporary.

The trial for 5G technology in India was to begin earlier this month. How has it panned out so far? No 5G trial has begun or is going on in India. A committee has been constituted by the department of telecommunication (DoT) to recommend the scope of technology trials, size, quantum, pricing and other aspects for offering experimental trial spectrum for 5G and other trials and relevant issues as envisaged in the NINCP (national digital communications policy).

The committee is expected to submit its report shortly to DoT. The 5G trials will begin post-release of this report. The committee has not suggested any exclusion, which means all will be allowed to participate in the trials. While many other global brands were part of the trial, Huawei did not figure

place, active discussions are underway to expedite 5G trials in India. We hope the government will take a quick and balanced decision.

How has the government's delay in its decision on this crucial issue affecting the industry? Based on the government's announcements, India can realistically look at 5G bidding by late 2019 or early 2020, as by then, the industry will know the cost of equipment and relevant use cases, which in turn would define viable revenue streams for service providers. A big concern for the industry is spectrum pricing recommended by TRAI.

Many countries blocked Huawei's access to their 5G market because they were not sure about the safety of data in the Chinese company's hands. Do you see this as a serious concern in India as well? It is unfortunate that Huawei has found itself in the middle of an impending global trade war between two of the world's largest economies. Huawei has had a clean record till date—they are the most scrutinised and evaluated company in the world. The new government has already stated that the data protection bill will be a high priority. Any decision here should be made by considering both the requirements for economic prosperity and cyber security assessment. However, it is important to address cyber security risks through an evidence- and fact-based approach, rather than making threats because of fear.

How does India's 5G future look? Once implemented, 5G will unleash a quiver full of revolutionary changes. India has been experimenting with specific 5G use cases that are unique to the country—many of which were hitherto discarded and thought to be unrealistic. Many new technologies—driverless vehicles, smart healthcare, smart agriculture, smart transportation and traffic management, drones, and remote consultation by doctors, are pretty much within the realms of possibility now with the advent of 5G. Once commercially deployed, 5G will usher in a truly networked society. It has the potential to connect India with global markets and help the country take advantage of the economies of scale. The collective impact of 5G on India's economy is expected to touch a staggering \$1 trillion by 2035.

"ONCE IN PLACE, 5G WILL MAKE INDIA TRULY NETWORKED"

on the list. Why?

Last year, the DoT had invited Huawei, along with other industry players, to share their proposal for conducting 5G trials in India. Today, the industry waits for approval on its proposal as well as clarity of the spectrum allotment for these trials. With the new government in

"It is unfortunate that Huawei has found itself in the middle of an impending global trade war. The company has had a clean record till date."

TODAY'S QUOTE

Timely resolution of AGR issue is important

Quick resolution of the AGR payment timeline is important for telecom companies as it would provide certainty in decision-making. COAI will continue to engage with the Telecom Department on outstanding issues despite the disappointment on budget not outlining any big-bang relief for the sector, but discussions will happen once there is clarity on outcome of modification petition

— COAI Director General **Ranjan Mathews**



Telecom Regulator Urged to Allow Delay in Report Filing

COAI seeks at least six weeks more to submit quarterly, monthly reports

Muntazir Abbas
@timesinternet.in

New Delhi: Telecom carriers have urged the sector regulator to defer mandatory monthly and quarterly filing of reports by at least six weeks from the deadline, in the wake of the nationwide lockdown to arrest the spread of Covid-19.

In a letter dated March 26 to Telecom Regulatory Authority of India (Trai) Chairman RS Sharma, seen by ET, the Cellular Operators Association of India (COAI) requested that its member telecom service providers be given additional time of at least six weeks, from the due date, to file all monthly and quarterly reports which are due for submission in April 2020.

COAI represents private telcos Bharti Airtel, Reliance Jio and Vodafone Idea.

The letter comes amidst a 21-day national lockdown since



Tuesday, following which the telecom companies have asked most of its staff to stay indoors, and work from home due to epidemic outbreak.

Regular day-to-day operations of telecom service operators have been impacted with minimal staff manning the requirements," Rajan S Mathews, director-general of COAI, said in the letter.

Telcos are required to submit multiple dashboards and reports

to Trai as a part of regulatory compliances. These include reporting of their tariff packs as well as inactive or suspended subscribers, as a part of the regulator's revocation list.

"In the present crisis, there is significant strain on the human resources of the operators as they are grappling with the operational issues arising from the Covid-19 outbreak on one hand, while also trying to fulfill the licensing compliance on the other hand," the group said.

The telcos are currently focussed on upkeep of their networks on a war footing with on-field staff amidst a jump in consumption.

"It is extremely difficult for our members to submit various monthly and quarterly reports on the due date as per the Trai requirements as most of these reports require circle-wise compilation," the letter said, and added that in the current environment it would not be possible.

Meanwhile, the regulator has suspended all open house discussions (OHD) in the wake of the ongoing pandemic.

OHD allows industry stakeholders and officials to come together to discuss issues that require attention and better policymaking.

Yet another tumultuous year ahead for telecom industry

Move towards duopoly, AGR issue will be key challenges

Muntazir Abbas

2019 was a roller-coaster year for the telecom industry and 2020 will be another year of disruption that would radically change the ever-evolving sector's landscape. The worst for the sector is not over yet and the industry is likely to witness many surprising twists and turns this year.

Move towards duopoly

The biggest change for the industry, which is under financial strain, would be move towards duopoly.

"The country is increasingly moving towards a duopoly, with only Reliance Jio Infocomm (Jio) and Bharti Airtel (Bharti) left in Bharat. Sanchar Nigam Ltd (SNL) is in bad shape, and we don't know how long they can continue operations without the government support," Anshu Nandan, Vice-President-Analyst at Garner, told Businessline.

"It's not just the financial situation, but the overall crisis in the industry also played a part," he said, adding, duopoly is not in the best interests of the sector.

To ride over the crisis, the



Firming up of tariffs and improved network connectivity are some of the expectations of the industry

telecom sector needs government support and most importantly the Adjusted Gross Revenue (AGR) issue.

On October 24, the Supreme Court had upheld the centre's plea to recover AGR of about ₹92,000 crore from telecom service providers, a move that widened the operators' losses for the second quarter ended September 30. Noida-based Idea recorded a loss of ₹50,521 crore, the highest-ever loss for a corporate in India, on account of provisioning for AGR payouts, while real Bharti Airtel posted its highest-ever net loss of ₹21,045 crore for the period.

"The industry is expecting a final resolution on AGR in

2020, and we hope that the Supreme Court's decision would lead to some positive outcome," Rajan S Mathews, Director-General of Cellular Operators Association of India (COAI), the apex body of telecom industry, said.

Licence fee The industry is also expecting a slash in licence fee in Budget 2020 following a representation made to Finance Minister Nirmala Sitharaman and the Department of Telecommunications (DoT).

"We have requested a reduction in licence fee to 3 per cent from the present 8 per cent of the revenue earned and slashing of Spectrum Usage

Charges to 1 per cent from about 6 per cent," Mathews said.

BSNL, MTNL revival A revival in the fortunes of BSNL and Mahanagar Telephone Nigam Ltd (MTNL) is also expected in 2020, following the success of the State-owned companies' Voluntary Retirement Scheme (VRS). Nearly 92,300 employees of the PSUs opted for the separation scheme.

"BSNL is on a revival path and the company is now gearing up for 5G launch with the Government already approving spectrum allocation. BSNL would be allocated 4G spectrum from March 2021, while

the management has also taken an initiative to outsource maintaining network to third party," Sanchar Nigam Executives' Association, an employees' union at BSNL, General Secretary Sebastian Kairi.

"Employees saved BSNL, going to the extent of paying for the company's maintenance from their own savings, during the crisis and will work hard for its revival," he added.

5G roll-out

However, belying industry expectations, 5G roll-out would be delayed further. While the spectrum auctions are expected by the fourth quarter of this financial year, commercial roll-out of 5G would not happen in 2020.

"We will see a lot of progress on 5G tests but I think any meaningful launch is at least 1.5-2 years away," COAI's Mathews said.

Firming up of tariffs, improved network connectivity and stability on the horizon form are among the expectations of the industry in 2020.

"There also a need to increase fibre on the ground and without adequate fibre, 5G investments wouldn't be helpful," Gartner's Nandan said.

The telecommunication sector is the second largest and fastest growing in the world, with 1.9 billion users (fixed and mobile) as of September 30, 2019 (according to COAI data).

No respite for the telecom sector

EVEN THOUGH THE Economic Survey acknowledged the significance of the telecom sector for India's economy and how it supports millions of jobs, while making substantial contribution to the funding of the public sector, Budget FY21 cleared from talking about major issues facing the sector, or provided any relief geared towards the sector's sustainability and growth.

While the industry welcomes the umbrella theme of the Budget, which emphasises on pushing for an aspirational India, there were no announcements made regarding the rationalisation of levies and taxes currently imposed on the severely distressed telecom sector.

The sector pays 18% goods and services tax (GST), 8% licence fee, 3-6% spectrum usage charge (SUC), which adds to being the highest compared to the rest of the world.

We were hopeful this Budget will introduce viable reforms that can provide relief to the sector reeling under a debt of ₹7.7 lakh crore. The telecom sec-



RAJAN S MATHIEWS
DIRECTOR GENERAL,
CELLULAR OPERATORS
ASSOCIATION OF INDIA

tor, which contributes 6% to the country's gross domestic product (GDP), has been suffering from acute financial crises due to dilapidating revenues and rising debt, emanating from low tariff rates, falling average revenue per user (ARPU), immense competition and the recent AGR judgment passed by the Supreme Court, pressurising the sector even further.

While finance minister Nirmala Sitharaman rightfully stated that the nation's growth and digital inclusion essentially pivots on advanced technologies such as artificial intelligence, internet of things, robotics, machine learning and analytics, and that the new India will be driven by innovation, none of these initiatives are possible on ground without a financially healthy and strong telecom sector.

On the positive side, the Budget laid special emphasis on augmenting domestic manufacturing of network products, mobile phones, electronic equipment, semiconductors and healthcare products, and allotted ₹27,300 crore for the development of

industry and commerce by 2021. It talked about linking of 1 lakh gram panchayats to BharatNet, through Fiber to the Home (FTTH), by this year, and allocated ₹6,000 crore towards this.

The project aims to extend high-speed broadband connectivity across the length and breadth of the country, to facilitate last-mile delivery of e-governance, e-health, e-education, e-banking, internet and other utility services.

Since BharatNet is funded by the USOF, set up to enhance telephony and internet connectivity services across rural and remote parts of the country, a relaxation in this levy from 5% to 3% would have been a welcome move.

It is also disheartening to see that the telecom sector was not given an infrastructure status even though an array of crucial reforms have been announced on infrastructure. The telecom sector, which is the economic backbone of the country and has a potential to drive growth towards the \$5-trillion economy goal, did not receive the support it truly deserved.

अवैध मोबाइल सिग्नल बूस्टर पर छापे

सख्ती
बंद दिल्ली | विशेष संवाददाता

डिजिटल ऑफ टेलिकॉम को तर्फ से दिल्ली एनसीआर के कई इलाकों में अवैध मोबाइल सिग्नल बूस्टर लगाने वालों पर छापेमारी की गई है। छापेमारी के दौरान बरतन बूस्टर निकाल कर बड़े पैमाने पर नोटिस भेजे जा रहे हैं। घर और दफ्तों के अलावा कई बड़े बाजारों में भी छापेमारी की गई है जहाँ अवैध सिग्नल बूस्टर बंद किये जा रहे हैं।

डिजिटल ऑफ टेलिकॉम के अधिकारियों ने ये छापेमारी टेलिकॉम

नेटवर्क बिगाड़ रहे अवैध बूस्टर

टेलिकॉम विभाग और टेलिकॉम रेग्युलेटरी अथॉरिटी ऑफ इंडिया का मानना है कि अवैध बूस्टरों से बड़े पैमाने पर गड़बड़ी हो रही है। इन बूस्टरों से अग्र किस्मी जगह सिग्नल बढ़ाने से जो असरफे के इलाकों में गड़बड़ी भी आती है। कई बार ऑपरेटरों की तरफ से सेंट वी गई प्रतिक्रिया से सिग्नल में गड़बड़ी आ जाती है नेटवर्क बिगाड़ जाता है।

कंपनियों के साथ मिलकर की है। दिल्ली के लक्ष्मी नगर, पहाड़नगर, ग्रेटर कैलाश, इलाकों में भी कई गड़बड़ी हो रही है। इन इलाकों में विभाग को टीम ने 32 जगहों पर री कानूनी सिग्नल बूस्टर हटाने में सफल हो 42 अगुओं पर तत्काल प्रभाव से बूस्टर हटाने के नोटिस जारी किए हैं।

कार्यवाही की गई है। दिल्ली साथ ही ये छापेमारी मोरडा और गुरुग्राम के भी कई इलाकों में भी की गई है। इन इलाकों में विभाग को टीम ने 32 जगहों पर री कानूनी सिग्नल बूस्टर हटाने में सफल हो 42 अगुओं पर तत्काल प्रभाव से बूस्टर हटाने के नोटिस जारी किए हैं।

DoT meeting

Rajan Mathews, director-general, COAI

The DoT was clear that they were keen to work with the industry to ensure our networks remained available 99.99% of the time and customers were not inconvenienced, especially those operating now from their homes (due to Covid-19)



COAI @ConnectCOAI

The #industry has witnessed exponential #growth over the last few years primarily driven by affordable #tariffs, wider availability, roll out of #MNP, expanding #coverage, evolving consumption patterns of subscribers and a conducive #regulatory #environment. @investindia @rvp



COAI @ConnectCOAI

Mr. Rajan S Mathews welcoming the Government officials for #IMC2019 curtain raiser. @exploreIMC @rsprasad @DoT_India



7:47 PM · Jul 27, 2019 · Twitter Web App

COAI @ConnectCOAI

#Indian telecom operators and the Wireless Monitoring Organisation, DoT conducted raids on several locations across #Delhi to take down #illegal #mobile signal repeaters installed by individuals effect. @DanishKh4n @DoT_India @ETTelecom @TelecomTalk



Telecom dept, telcos conduct raids across Delhi-NCR to take down illegal mobile... According to a statement by the COAI, the DoT along with the authorities have served notices and may impose heavy fines on owners of several premises... @telecom.economictimes.indiatimes.com

7:37 PM · Jun 12, 2019 · Twitter for Android

COAI @ConnectCOAI

To achieve the total #telecom license fee of 4%, the USO contribution should immediately be reduced to 3% with the ultimate objective of doing away with the levy in the next 2-3 years in line with the recommendations of the telecom regulator. @DoT_India

COAI urges cut in USO fee to 3%, telecom licence fee to 4% ... The reduction in these levies will act as incentives for operators to expand the network in rural areas. @telecom.economictimes.indiatimes.com

10:14 AM · Aug 21, 2019 · Twitter Web App

COAI @ConnectCOAI

#India has a population of 1.3 billion people. Of this 1.23 Billion already have #AadharCards, 1.2 billion have #phones, and 560 million are #internet users. A national #communication network is emerging. @GoogleIndia @PMOIndia @ericsson @TRAI @amitabhk87



11:00 AM · Nov 12, 2019 · TweetDeck



connectcoai

UNION BUDGET 2020

- BharatNet: Rs 6000 crore allocated for internet connectivity. Fiber to Home connections under BharatNet will be provided to 1 lakh gram panchayats by 2025.
- New scheme will be introduced focusing on encouraging the manufacturing of mobile phones, smart devices, equipment, and accessories packaging.
- Adoption of Machine Learning and Artificial Intelligence in Ayushman Bharat.
- Introduction of policy based on Data Center Parks.
- Tech upgrade for better nutrition status - Over 6 lakh Anganwadi workers have been equipped with smartphones to update the nutrition status of 10 crore households.

View Insights Promote

connectcoai #Budget2020
Honble #Finance #Minister @nsitharaman announces policies such as #Fiber to home through #BharatNet which will link 100,000 #Gram #Panchayats in FY21 itself. An allocation of Rs 6,000 crore will be provided for #BharatNet. @digitalindia2k20 @fcci_india @ravishankrprasad @officialdigitalindia @pibindia @sti.tech @hindustantimes

1 February

COAI @ConnectCOAI

#COAI urges #subscribers for responsible usage of #data, so that critical services can run smoothly & uninterrupted on #communications infrastructure. #COVID19 #IndiaFightsCoronavirus #StayHome #StaySafe #21dayLockdown #WeAreInThisTogether #LetsFightCovid19 #FightCOVID19

COAI urges subscribers for responsible usage of data, so that critical services can run smoothly & uninterrupted on communications infrastructure

VodafoneIdea, News and 8 others

COAI @ConnectCOAI

COAI salutes the unsung #network heroes working on the frontlines for us so we can #StaySafe and #StayConnected! We are also thankful to the #government for their unwavering support during these challenging times. @PMOIndia @DoT_India @Gol_MeitiY @rsprasad @TRAI @mygovindia #COVID

COVID19 PANDEMIC IS A GLOBAL BATTLE

1.8K views

12:03 PM · Apr 30, 2020 · Twitter Web App



connectcoai

Smart Cities function on interconnected technologies that can communicate, transfer and analyse data. That's the reason the High Speed Fiber is at heart of the smart city as it transfers the tremendous volumes of data to cloud-based systems and will turn numbers into actions.

View Insights Promote

connectcoai #SmartCities function on #interconnected #technologies that can #communicate, #transfer and #analyze #data. That's the reason the #High-Speed #Fiber is at heart of the #smart #city as it transfers the #tremendous #volumes of data to #cloud-based #systems and will turn #numbers into #actions.

14 January

About COAI

COAI was constituted in 1995 as a registered, non-governmental society. The Association is dedicated to the advancement of modern communication through the establishment of world-class mobile infrastructure, products and services and to delivering the benefits of innovative and affordable mobile communication services to the people of India.



Industry Policy

COAI has emerged as the official voice of the Indian telecom industry that interacts directly with ministries, policy makers, regulators, financial institutions and technical bodies. It provides a forum for discussion and exchange of ideas between these bodies and the service providers, who share a common interest in the development of mobile telephony in the country.



Telecom Issues

COAI collaborates with other industry associations such as CII, FICCI, ASSOCHAM, GSMA, ISPAI, ICA, etc., with the objective of presenting an industry consensus to the Government on crucial issues related to the growth and development of the Indian telecom industry.



New Technologies

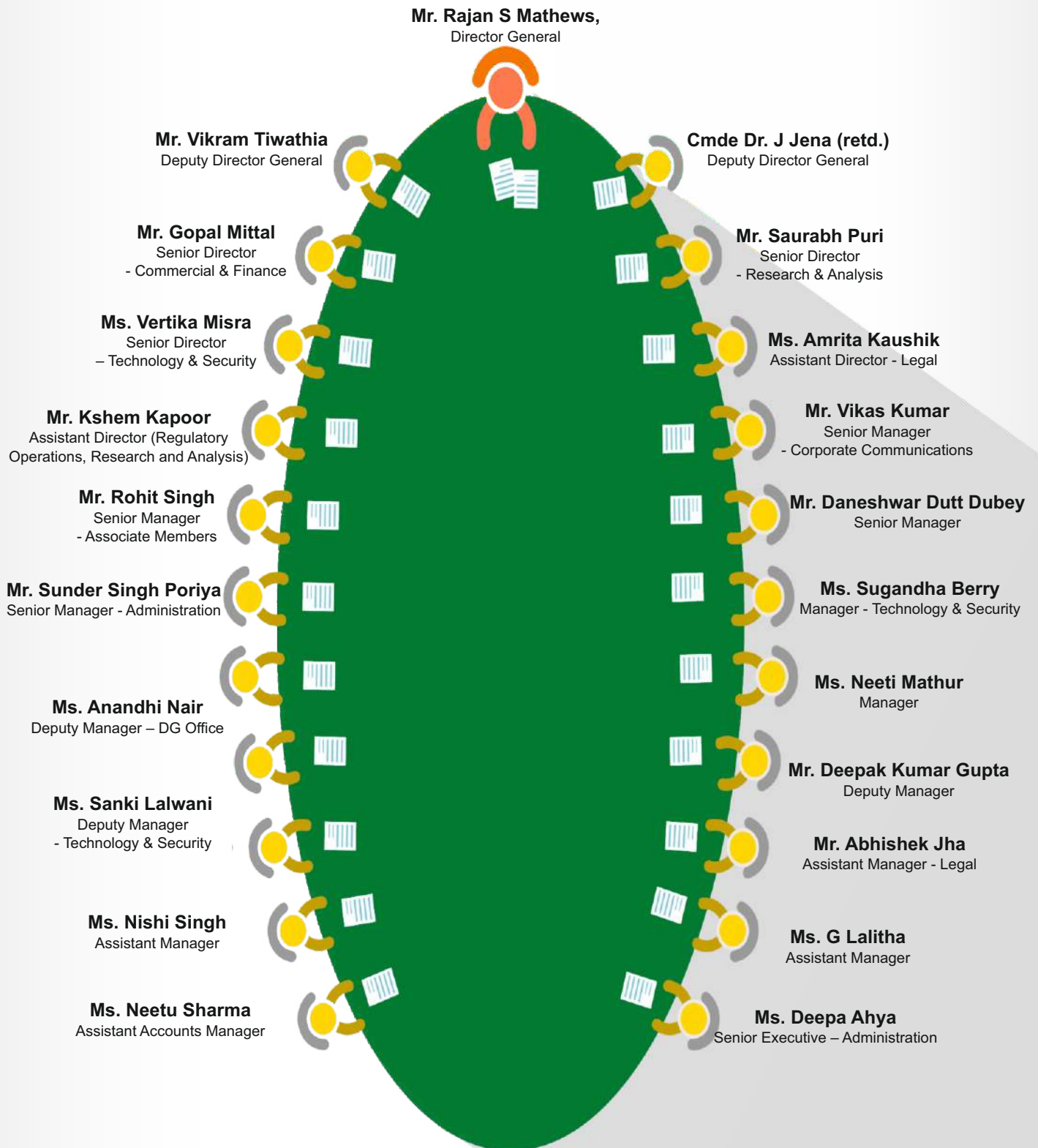
COAI is determined to encourage the confluence of technologies to facilitate the move towards complete convergence in communications as this could greatly help India mitigate the problems of low fixed line penetration and help realize country's vision of becoming an Information Society.



Thought Leadership

COAI aims to dispense information and spread awareness among the national and international entities and consumers on issues pertaining to service quality and other value-added services provided by the operators to their subscribers.

COAI Secretariat



Management

The COAI secretariat comprises of a Director General at the helm of two Deputy Director Generals to support him. There are six departments of teams in the association that ensure that COAI is one of the most credible and reputed industry bodies, solely dedicated towards advancement of mobile communication.

There are currently 22 people working in the COAI secretariat bringing talent and skills from various areas of work, such as regulatory, legal, finance, public affairs, technology and infrastructure.



RAVINDER TAKKAR
Chairman

Ravinder Takkar is the Managing Director and Chief Executive Officer (MD & CEO) of Vodafone Idea Limited, India's leading telecom service provider, effective 19th August 2019.

Ravinder's professional experience of 25+ years spans across cultures and geographies, building a strong track record in the field of business strategy, business planning and development in the ICT sector. Associated with Vodafone Group since 1994, he has worked in leadership positions with several operating companies of Vodafone, in multiple markets across the world.

He has been closely associated with the growth and evolution of Indian telecom since Vodafone Group's entry in 2007. He held a number of senior roles in strategy and business development and was also the CEO of Vodafone's Enterprise business in India. He has also served as Director on the Board of erstwhile Vodafone India Limited.



AJAI PURI
Vice Chairman

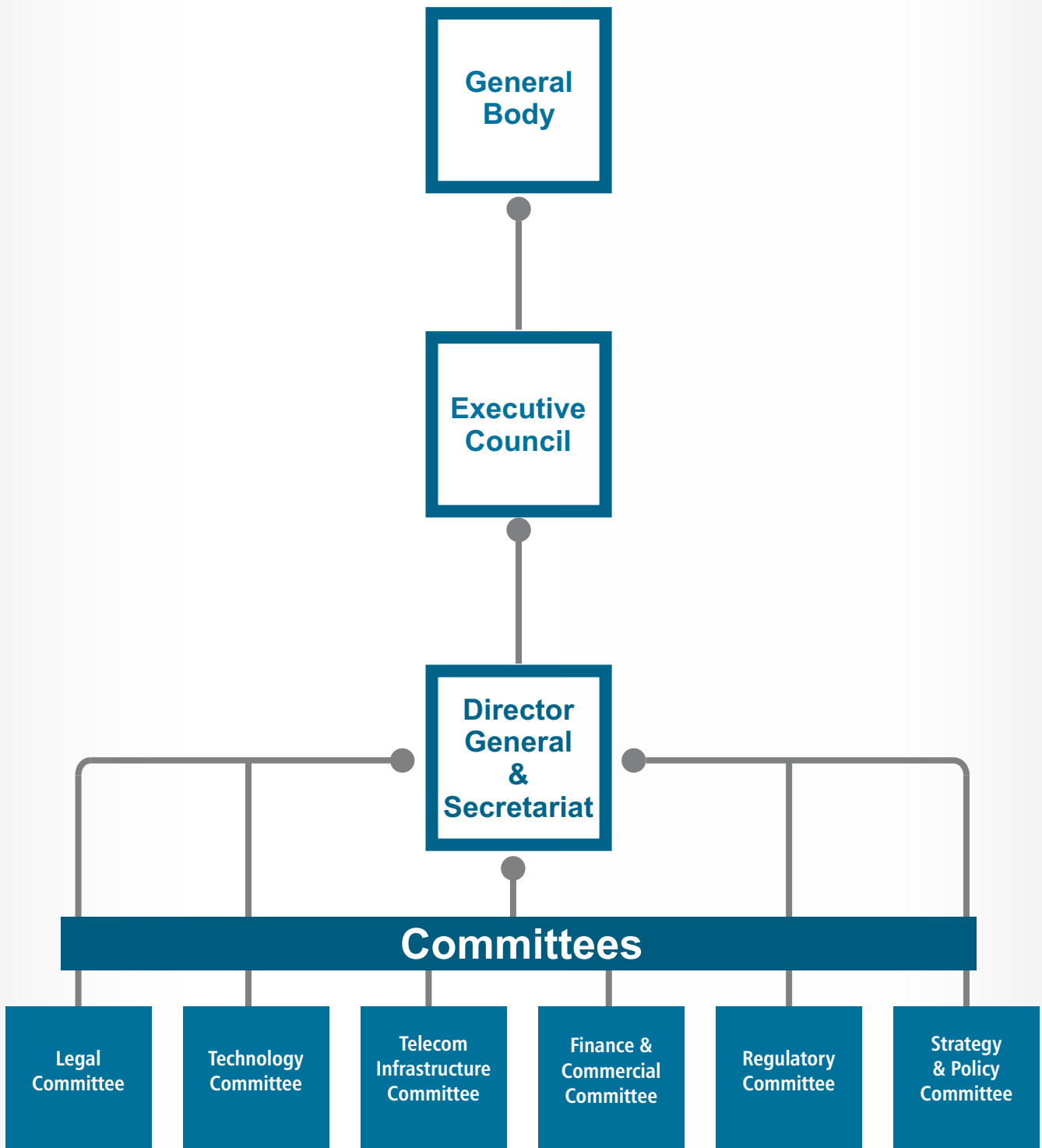
Ajai Puri is the Chief Operating Officer (India and South Asia) at Bharti Airtel Limited. He has been with Bharti Airtel since 2004 and has held several senior leadership positions including Director – Market Operations, Director and CEO – DTH, and CEO – Kolkata & West Bengal, Odisha. Prior to joining Bharti Airtel, Mr. Puri served as the Business Head - Foods at Cargill Foods India. He began his career with VST India Ltd, an associate company of British American Tobacco (UK).



RAJAN S. MATHEWS
Director General

Prior to joining COAI as DG, Rajan served as COO of US Operations and Corp. CFO and VP of Telargo Inc. (a Joint Venture of NTT DoCoMo), overseeing all of the company's Strategic Planning, Business Development, Financial, Treasury, Accounting, Tax, Administrative and Human Resource functions.

COAI Structure



Working Groups and Special Projects

ACT (Apex Advisory Council for Telecom in India)

EMF Portal Working Group

Sub-Group on Reduction in Regulatory levies

COAI Members 2019-2020

COAI CORE MEMBERS



COAI ASSOCIATE MEMBERS





Team COAI

The COAI team includes dynamic, experienced and highly skilled professionals with a must-do attitude and remarkable proficiency in their respective verticals. Lean and yet highly competent, the Secretariat is committed towards the successful implementation of every activity undertaken towards the cause of the industry.

Regular coordination with the Government, the Regulator, relevant State Government departments, and other stakeholders, have established appreciation and recognition of the Secretariat's efficiency and professional prowess, both within, and outside the industry.

This year Mr. Deepak Kumar Gupta, Deputy Manager joined COAI adding to the Secretariat's strength.

The Secretariat is thankful to all its members and highly appreciates their valuable guidance, mentoring and constant support towards its efficient functioning and productivity.



COAI

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