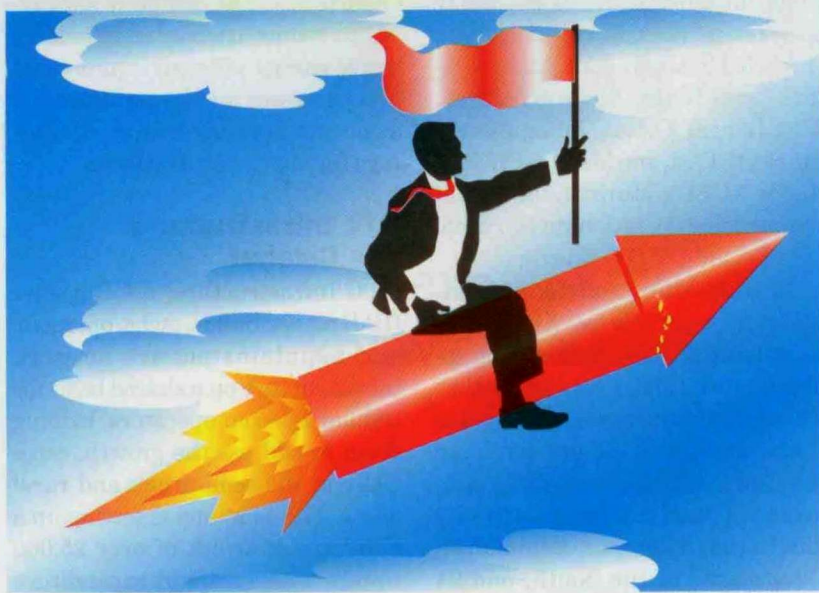


# Leaders in the Making

The telecom market witnessed a host of new entrants stepping up activities last year. We present the most promising of the lot...



In the Indian scenario, where few big players dominate the telecom field, new and emerging companies have to struggle to establish themselves. But last year

saw some new companies taking aggressive steps to increase their presence in this space, and cash in on the telecom boom. IMI mobile, XCEL Telecom, Quippo Infrastruc-

ture, and GTL Infrastructure are few companies that made a mark in the last financial year.

## IMI mobile The Perfect Mix

IMI mobile is a fast-growing global company with 310 employees, and operating in 51 countries that support 202 operator deployments and over 400 content partners.

The company employs carrier-grade messaging platforms and gateways, content management systems, along with video and voice platforms. Their services include interactive portals, community and service creation applications, caller ring back tone, and video streaming.

IMI mobile delivers managed VAS and content platforms and aggregates content for operators and portals; manages the delivery of content for content partners; and also manages mobile campaigns for media, advertising, and enterprise customers. The company boasts of a substantial customers base, including operators like Airtel, Vodafone Essar, and Maxis, enterprise customers like Google and Reuters, and content partners and portal customers such as Yahoo!, Sony, Jamba, Disney, and Universal.

The highlight for the company this year was its partnership with BSNL in April 2007. IMI mobile, through its PRBT (personal ring back tone) service launched last year, achieved 20,000-30,000 sub-

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**Sandip Basu**  
CEO, XCEL Telecom



**Prakash Ranjalkar**  
Director and COO,  
GTL Infrastructure



**A.R. Vishwanath**  
CEO & Founder, IMI Mobile

scribers a month, and a total of one million users in 52 days. The company provides a comprehensive technology platform and region based content to BSNL in eight circles of the North zone, covering the Jammu & Kashmir, Himachal Pradesh, Punjab, Haryana, Rajasthan, UP (E), UP (W), and Uttarakhnad. Recently, BSNL and IMI Mobile's PRBT service passed the 2-mn users milestone.

### **XCEL Telecom Poised to Win**

XCEL Telecom started its sales pitch in March, 2007 and signed its first term sheet with two major mobile service providers in mid-June, 2007. The company has 300 employees, both directed and outsourced.

By the end of FY 2007-08, XCEL will be partnering with major mobile service players including Aircel, BSNL, HFCL, Spice, TTML, TTSL, and Vodafone. Since commencing

its operations in the Punjab telecom circle in June, 2007, XCEL today operates in Karnataka, Rajasthan, Himachal Pradesh, J&K, Maharashtra, Tamil Nadu, Andhra Pradesh, West Bengal, Orissa, Bihar, Assam, the North East, and Madhya Pradesh circles. XCEL is also in the process of commencing operations in Haryana, UP (E), and UP (W) shortly.

Within nine months of commencing operations, XCEL has established itself by constructing approximately 1,000 sites and another 500 plus are in progress. Some sites constructed by XCEL are in remote locations, which are neither connected by road nor have electricity like Beltali, Khanpur, Bamniabad, Gangasagar in the South, and 24 Paraganas District of West Bengal.

The company is targeting 25,000 towers in the next three years, and with the government permitting sharing of active infrastructure in telecom, XCEL is strategically

poised to address this emerging opportunity. The company endeavors to reduce carbon emissions by using energy efficient equipments and processes and by continuously exploring innovative product offerings for energy conservation.

### **GTL Infrastructure The Catalyst**

GTL Infrastructure, a Category-I (IP-I) player, builds, owns, operates, and maintains passive network infrastructure on a shared basis for cellular telecom operators, helping them to address the growth, especially in the semi-urban and rural areas. The company is setting up a pan-India network of over 25,000 towers with a capital expenditure of over Rs 7,200 crore.

The company has also ramped up operations, providing direct employment to 200 people. However, through its associate partners, it provides employment to over 40,000

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## Actions Speak...

IMI Mobile	GTL Infrastructure	Quippo Telecom Infrastructure	XCEL Telecom
Has 300 employees worldwide	Has 200 direct employees and provides employment to over 40,000 people through its associate partners	Has 259 fully trained employees	Has 300 employees (both directed and outsourced)
Operations in 51 countries	Having Pan India network with over 25,000 towers and with a capital expenditure of over Rs 7,200 crores	Within time of two years, QTIL has developed around 4500 towers in 12 circles	It operates in Punjab, Karnataka, Rajasthan, Himanchal Pradesh, Jammu & Kashmir, Maharashtra, Tamil Nadu, Andhra Pradesh, West Bengal, Assam, Orissa, Bihar, North East and Madhya Pradesh Telecom circles
Services include Interactive portals, community and service creation applications, CRBT and Video streaming	Entered into the agreement with almost all the national operators	Quippo takeovers total 875 telecom towers of Spice Telecom	Xcel has constructed approximately 1000 sites and another 500+ works in progress
BSNL and IMI Mobile personalized ring back tone service (PRBT)	Working with more than 300 vendors across the country	Plans to offer total end-to-end solutions (both active and passive sharing), last mile connectivity and managed services	Acquire IP-1 company TICS Telecom Towers
Plans to launch more innovative services	Plans to roll-out 6,010 towers by the end of FY 2008	In around 4500 towers, more than 50% of these are already shared by multiple operators	Poised to add 25,000 towers portfolio in the next three years

people, with plans to generate an estimated 200,000 employment in the next three years.

GTL Infrastructure has to its credit several milestones like becoming the first company in the shared telecom space to have been listed on the stock exchanges in the Apac region. It had also successfully rolled out 6,010 towers by the end of FY 2007-08.

In the last two years, the company has seen commendable growth. The telecom infrastructure company is also a part of the government initiative designed to promote shared telecom infrastructure in rural and urban/semi-urban India. It has won 421 sites as part of the Government of India's initiative of USO Fund (Universal Services Obligation Fund). It is also part of the 'MOST' (Mobile Operator's Shared Towers) initiative that is helping telephony reach restricted areas such as defense, government establishments, etc.

The shared telecom infrastructure deployed by GTL Infrastructure can also be used to deploy new

technologies like 3G, WiMax, etc. Its ready-to-use independent infrastructure sites provide new operators an opportunity to deliver their services in the difficult to reach and commercially unviable markets like rural and semi-urban areas.

The company's environment and energy friendly-shared infrastructure lead to judicious use of natural resources. In the future, the company is expecting a drastic change in the revenue mix and plans to strengthen its global footprint. GTL Infrastructure will be a catalyst in taking the telecom revolution to the next level.

### Quippo Telecom Infrastructure Reaching New Heights

QTIL has developed around 4,500 towers in 12 circles: Punjab, Karnataka, UP (E), UP (W), Haryana, MP, Gujarat, Rajasthan, West Bengal, Assam, Bihar, and the North East, and more than 50% of these are already shared by multiple operators.

The Quippo-Spice deal is one of the most talked about deals of

the year. Quippo Telecom Infrastructure's buyout of 875 telecom towers of Spice Telecom, for close to Rs 600 crore strongly indicates its move toward consolidation in the tower segment. As part of the deal, Quippo will not only maintain and rent these towers, but also set up new towers to meet future requirements of Spice Telecom.

QTIL has around 259 fully trained employees and has developed over 5,000 towers. As the next step toward expansion, Quippo plans to offer end-to-end solutions like active and passive sharing, last mile connectivity, and managed services. In the near future, Quippo seeks to become a strategic growth partner of service providers.

Reflection of the growing telecom infrastructure market and the dependence on VAS in the face of falling ARPU, three out of four emerging companies profiled are operating in this infrastructure space, while the other is a VAS provider.

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