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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 26th March, 2018

For Immediate release **Website:- www.trai.gov.in**

"Indian Telecom Services Performance Indicator Report" for the Quarter ending October-December, 2017

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending December, 2017. This Report provides a broad perspective of the Telecom Services in India and presents the key parameters and growth trends of the Telecom Services as well as Cable TV, DTH & Radio Broadcasting services in India for the period covering 1st October, 2017 to 31st December, 2017 compiled mainly on the basis of information furnished by the Service Providers.

Executive Summary of the Report is enclosed. The complete Report is available on TRAI's website (www.trai.gov.in under the link http://www.trai.gov.in/release-publication/reports/performance-indicators-reports). Any suggestion or any clarification pertaining to this report, undersigned (Shri S. K. Mishra, Pr. Advisor (F&EA), TRAI) may be contacted on Tel. +91-11-23221856, Fax. +91-11-23235249 and e-mail: skmishra.trai@nic.in.

Authorized to issue

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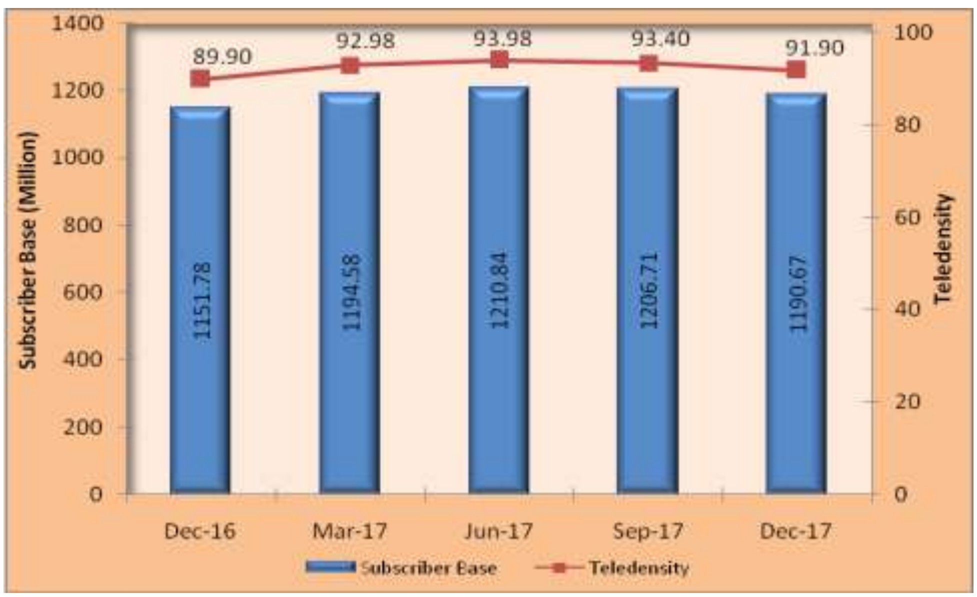
The Indian Telecom Services Performance Indicators
October – December, 2017

Executive Summary

1. The number of telephone subscribers in India declined from 1,206.71 million at the end of Sep-17 to 1,190.67 million at the end of Dec-17, registering a decline rate of 1.33% over the previous quarter. However, this reflects year-on-year (Y-O-Y) positive growth of 3.38% over the same quarter of last year. The overall Tele-density in India declined from 93.40 as on QE Sep-17 to 91.90 as on QE Dec-17.

Trends in Telephone subscribers and Teledensity in India

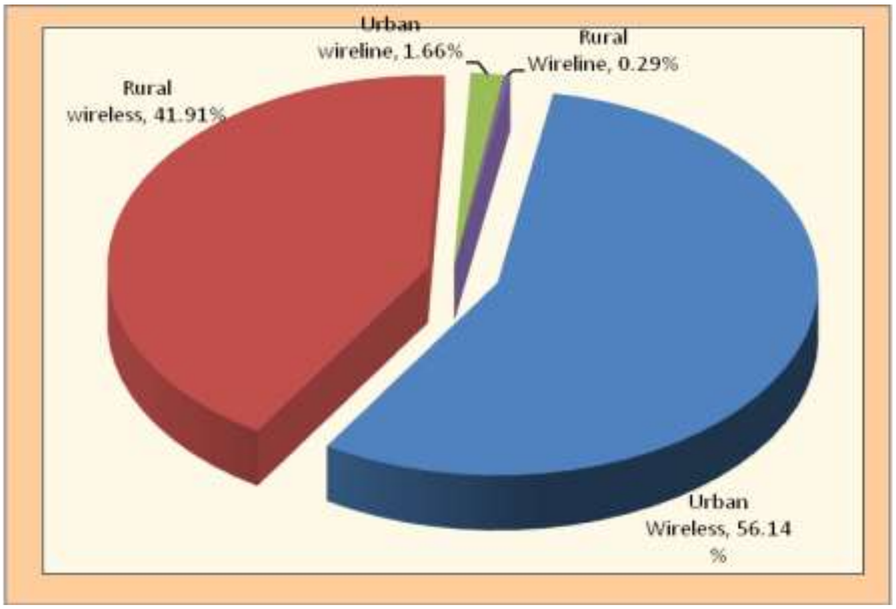


2. Subscription in Urban Areas declined from 704.89 million at the end of Sep-17 to 688.25 million at the end of Dec-17, and Urban Tele-density also declined from 173.15 to 168.29 during the same period.

3. Rural subscription increased from 501.82 million to 502.42 million however, Rural Tele-density slightly declined from 56.71 to 56.66 at the end of Dec-17.

4. Out of the total subscription, the share of Rural subscription increased from 41.59% at the end of Sep-17 to 42.20% at the end of Dec-17.

Composition of Telephone Subscribers



5. With a net decline of 15.61 million subscribers during the quarter, total wireless (GSM incl. LTE + CDMA) subscriber base declined from 1,183.04 million at the end of Sep-17 to 1,167.44 million at the end of Dec-17, registering a quarterly decline rate of 1.32% over the previous quarter. However, the year-on-year (Y-O-Y) growth rate of wireless subscribers for Dec-17 is 3.55%.

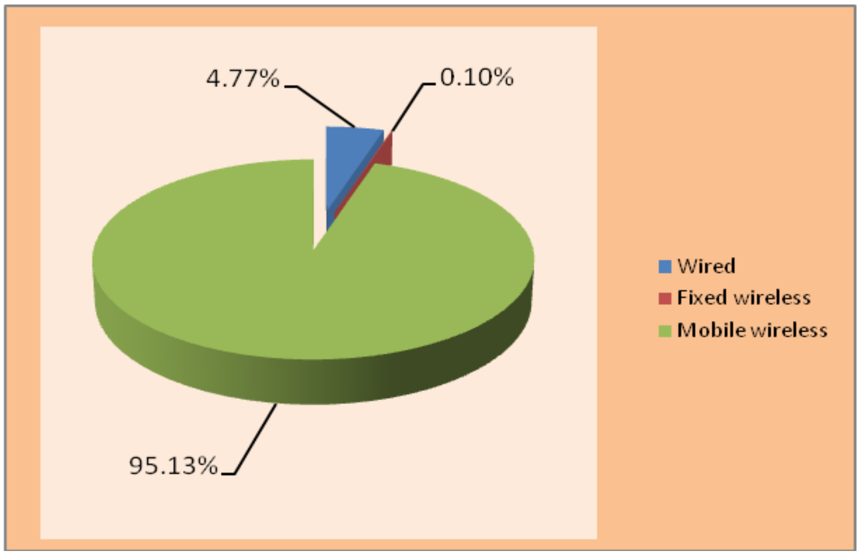
6. Wireless Tele-density declined from 91.56 at the end of Sep-17 to 90.11 at the end of Dec-17.

7. Wireline subscriber declined from 23.67 million at the end of Sep-17 to 23.23 million at the end of Dec-17 with quarterly decline rate of 1.84%. The year-on-year (Y-O-Y) decline rate in wireline subscribers for Dec-17 is 4.79%.

8. Wireline Teledensity declined from 1.83 at the end of Sep-17 to 1.79 at the end of Dec-17.

9. Total number of Internet subscribers increased from 429.23 million at the end of Sep-17 to 445.96 million at the end of Dec-17, registering a quarterly growth rate of 3.90%. Out of 445.96 million internet subscribers, Wired Internet subscribers are 21.28 million and Wireless Internet subscribers are 424.67 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband Internet subscriber base of 362.87 million and Narrowband Internet subscriber base of 83.09 million.

11. The broadband Internet subscriber base grew by 11.69% from 324.89 million at the end of Sep-17 to 362.87 million at the end of Dec-17. On the other hand, the narrowband Internet subscriber base declined by 20.37% from 104.34 million at the end of Sep-17 to 83.09 million at the end of Dec-17.

12. Monthly Average Revenue per User (ARPU) for GSM service (including LTE) declined by 5.37%, from ₹84 in QE Sep-17 to ₹79 in QE Dec-17. Monthly ARPU for GSM service (including LTE) declined by 23.61% on Y-O-Y in this quarter.

13. Prepaid ARPU for GSM service per month declined from ₹71 in QE Sep-17 to ₹67 in QE Dec-17, and Postpaid ARPU per month also declined from ₹361 in QE Sep-17 to ₹348 in QE Dec-17.

14. On an all India average, the overall MOU per subscriber per month for GSM service increased by 13.27% from 437 for QE Sep-17 to 495 in QE Dec-17.

15. Prepaid MOU per subscriber for GSM service increased from 419 in QE Sep-17 to 481 in QE Dec-17, however postpaid MOU declined from 818 in QE Sep-17 to 786 in QE Dec-17.

16. Monthly ARPU for CDMA full mobility service declined by 11.68%, from ₹125 in QE Sep-17 to ₹111 in QE Dec-17 and Y-O-Y basis Monthly ARPU for CDMA full mobility service declined by 21.78% in this quarter.

17. The total MOU per subscriber per month for CDMA full mobility service declined by 45.33%, from 206 in QE Sep-17 to 112 in QE Dec-17. The outgoing MOUs declined from 83 in QE Sep-17 to 73 in QE Dec-17, and incoming MOUs also declined from 123 in QE Sep-17 to 40 in QE Dec-17.

18. Gross Revenue (GR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the QE Dec-17 has been ₹61,089 Crore and ₹38,536 Crore respectively. GR declined by 7.95% and AGR declined by 7.52% in Q.E. Dec-17 as compared to previous quarter.

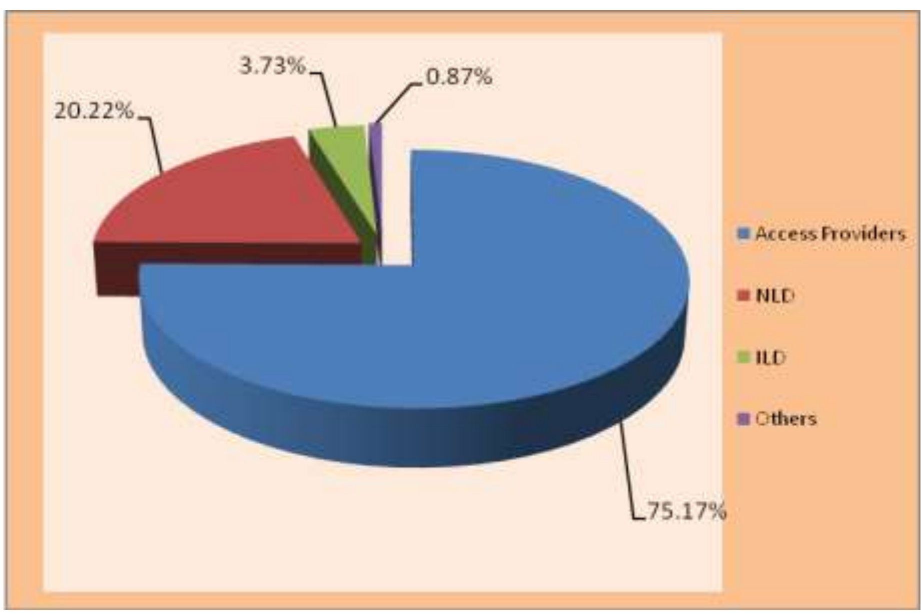
19. The year-on-year (Y-O-Y) growth in GR and AGR over the same quarter in last year has been -8.18% and -16.05% respectively.

20. Pass-through charges declined from ₹24,693 Crore in Q.E. Sep-17 to ₹22,552 in Q.E. Dec-17. The quarterly and the year-on-year (Y-O-Y) growth rates of pass-through charges for QE Dec-17 are -8.67% and 9.33% respectively.

21. The License Fee declined from ₹3,249 Crore for the QE Sep-17 to ₹3,104 Crore for the QE Dec-17. The quarterly and the year-on-year (Y-O-Y) growth rates of license fee are -4.46% and -16.04% respectively in this quarter.

22. Access services contributed 75.17% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Adjusted Gross Revenue(AGR), License Fee, Spectrum Usage Charges(SUC) and Pass Through Charges declined by 7.95%, 7.52%, 4.46%, 8.31% and 8.67% respectively in QE Dec-17.

Composition of Adjusted Gross Revenue



23. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, declined from ₹88.09 in QE Sep-17 to ₹80.77 in QE Dec-17.

24. The performance of Cellular Mobile service providers in terms of QoS during the quarter vis-à-vis that in the previous quarter is given as below:

Parameters showing improvement in QoS	**Parameters showing deterioration in QoS**
• Worst affected BTSs due to downtime • Call set-up success rate and Session Establishement success rate for Circuit Switched Voice or VoLTE as applicable (within licensee's own network) • SDCCH/Paging Channel and RCC Congestion (%age) • Connection with good voice quality, Circuit Switched Voice or VoLTE quality • Metering and billing credibility- pre-paid • Resolution of billing/ charging/ validity complaints (100% within 6 weeks) • %age of calls answered by the operators (voice to voice) within 90 sec • %age requests for Termination/ Closure of service complied within 7 days • Time taken for refund of deposits after closures	• BS Accumulated down-time (not available for service (%age) • TCH, RAB and E-RAB Congestion (%age) • Point of Interconnection (POI) Congestion (No. of POIs not meeting the benchmark) • Metering and billing credibility- post paid • Period of applying credit/ waiver/adjustment to customer's account from the date of resolution of complaints • Accessibility of call centre/ customer care

25. The performance of wireline service providers in terms of QoS during the quarter vis-à-vis that in the previous quarter is given below:

Parameters showing improvement in QoS
• Fault repaired by next working day for urban areas • Mean Time to Repair (MTTR) • Metering and billing credibility- post paid • %age of calls answered by the operators (voice to voice) within 90 seconds.

26. A total number of 877 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking/uplinking, as on 31st December, 2017.

27. During the quarter ending Dec-17, there were 304 pay channels as reported by 49 broadcasters as compared to 300 pay channels reported in the previous quarter. 304 pay channels include 216 SD pay TV channels and 88 HD Pay TV channels. During the quarter ending Dec-17, as per the reporting, **three** new pay channels were commenced. One FTA channel namely "JAN TV PLUS" converted into Pay channel.

28. Since its introduction in the year 2003, Indian DTH service has displayed a phenomenal growth. DTH has attained net pay active subscriber base of around 67.56 million. This is in addition the viewership of the free DTH services of Doordarshan. As on QE Dec-17, there are 6 pay DTH service providers in the country.

29. Apart from the radio Stations operated by All India Radio, the public broadcaster, as on 31st December, 2017, there are 326 operational private FM Radio stations and 86 existing cities with operational 34 FM Radio broadcasters as compared to 322 private FM Radio Stations 86 cities with operational 34 FM Radio broadcasters in the previous quarter.

30. According to the reporting of advertisement revenue done by the 34 FM Radio broadcasters, it has emerged that during the quarter ending Dec-17, four (4) new private FM Radio Stations have became operational.

31. As per data received from MIB, as on 31st December, 2017, there are 214 Community Radio Stations are operational.

Snapshot

(Data As on Q.E. 31st December, 2017)	
Telecom Subscribers (Wireless +Wireline)	
Total Subscribers	1,190.67 Million
% change over the previous quarter	-1.33%
Urban Subscribers	688.25 Million
Rural Subscribers	502.42 Million
Market share of Private Operators	89.31%
Market share of PSU Operators	10.69%
Teledensity	91.90
Urban Teledensity	168.29
Rural Teledensity	56.66
Wireless Subscribers	
Total Wireless Subscribers	1,167.44 Million
% change over the previous quarter	-1.32%
Urban Subscribers	668.44 Million
Rural Subscribers	499.00 Million
GSM Subscribers	1,162.20 Million
CDMA Subscribers	5.24 Million
Market share of Private Operators	90.45%
Market share of PSU Operators	9.55%
Teledensity	90.11
Urban Teledensity	163.44
Rural Teledensity	56.28
Total Wireless Data Usage during the quarter	6,521,893 TB
Wireline Subscribers	
Total Wireline Subscribers	23.23 Million
% change over the previous quarter	-1.84%
Urban Subscribers	19.81 Million
Rural Subscribers	3.42 Million
Market share of Private Operators	31.97%
Market share of PSU Operators	68.03%
Teledensity	1.79
Urban Teledensity	4.84
Rural Teledensity	0.39
No. of Village Public Telephones (VPT)	2,02,395
No. of Public Call Office (PCO)	3,93,483

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹ 61,089 Crore
% change in GR over the previous quarter	-7.95%
Adjusted Gross Revenue (AGR) during the quarter	₹ 38,536 Crore
% change in AGR over the previous quarter	-7.52%
Share of Public sector undertakings in Access AGR	8.14%
Monthly Average Revenue Per User (ARPU) for Access Services	₹ 80.77
Internet/Broadband Subscribers	
Total Internet Subscribers	445.96 Million
% change over previous quarter	3.90%
Narrowband subscribers	83.09 Million
Broadband subscribers	362.87 Million
Wired Internet Subscribers	21.28 Million
Wireless Internet Subscribers	424.67 Million
Urban Internet Subscribers	313.92 Million
Rural Internet Subscribers	132.03 Million
Total Internet Subscribers per 100 population	34.42
Urban Internet Subscribers per 100 population	76.76
Rural Internet Subscribers per 100 population	14.89
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking /uplinking	877
Number of Pay TV Channels	304
Number of private FM Radio Stations (excluding All India Radio)	326
Number of Pay Subscribers Active with Private DTH Operators	67.56 Million
Number of Operational Community Radio Stations	214
Number of pay DTH Operators	6
Revenue & Usage Parameters	
Monthly ARPU GSM Full Mobility Service including LTE	₹ 79
Monthly ARPU CDMA Full Mobility Service	₹ 111
Minutes of Usage (MOU) per subscriber per month - GSM Full Mobility Service including LTE	495 Minutes
Minutes of Usage (MOU) per subscriber per month - CDMA Full Mobility Service	112 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	322 Million
Data Usage of Mobile Users	
Average Data Usage per subscriber per month – GSM (2G+3G+4G)	1,955 MB
Average Data Usage per subscriber per month - CDMA	292 MB
Average Data Usage per subscriber per month –	1,945 MB
Average outgo per GB data for GSM including LTE (2G+3G+4G)	₹ 18.85
Average outgo per GB data for CDMA	₹ 125.86