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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 5th December, 2023

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

"Indian Telecom Services Performance Indicator Report" for the Quarter April-June, 2023

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 30th June, 2023. 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 April, 2023 to 30th June, 2023 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 and under the link http://www.trai.gov.in/release-publication/reports/performance-indicators-reports). Any suggestion or any clarification pertaining to this report, Shri Amit Sharma, Advisor (F&EA), TRAI may be contacted on Tel. +91-11-23234367 and e-mail: advfea2@trai.gov.in.

V. Raghunandan

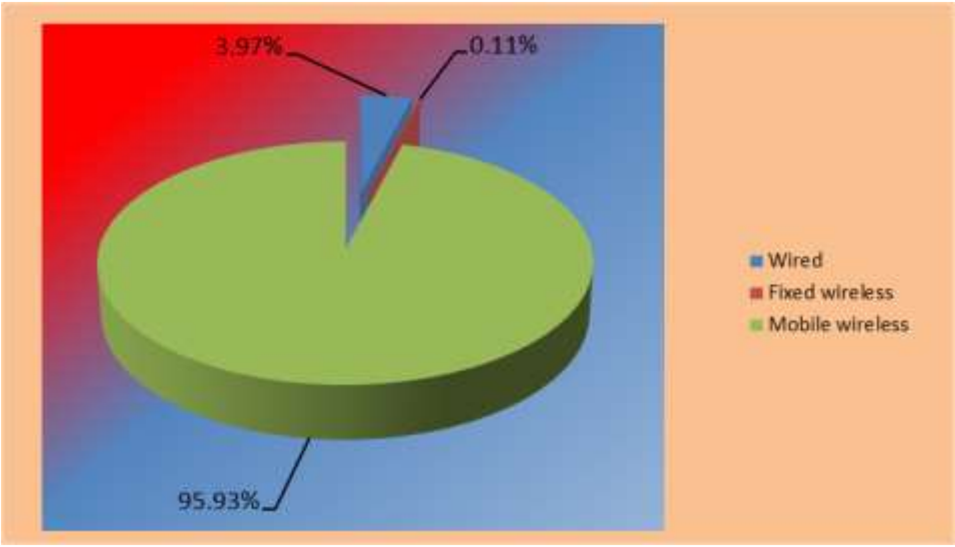
(V. Raghunandan)
Secretary, TRAI

The Indian Telecom Services Performance Indicators
April–June, 2023

Executive Summary

1. Total number of Internet subscribers increased from 881.25 million at the end of Mar-23 to 895.83 million at the end of Jun-23, registering a quarterly rate of growth 1.65%. Out of 895.83 million internet subscribers, number of Wired Internet subscribers are 35.54 million and number of Wireless Internet subscribers are 860.29 million.

Composition of internet subscription



2. The Internet subscriber base is comprised of Broadband Internet subscriber base of 861.47 million and Narrowband Internet subscriber base of 34.36 million.

3. The broadband Internet subscriber base increased by 1.76% from 846.57 million at the end of Mar-23 to 861.47 million at the end of Jun-23. The narrowband Internet subscriber base decreased from 34.69 million at the end of Mar-23 to 34.36 million at the end of Jun-23.

4. Wireline subscribers increased from 28.41 million at the end of Mar-23 to 30.31 million at the end of June-23 with a quarterly rate of growth 6.70% and, on Y-O-Y basis, wireline subscriptions also increased by 18.58% at the end of QE Jun-23.

5. Wireline Tele-density increased from 2.05% at the end of Mar-23 to 2.18% at the end of Jun-23 with quarterly rate of growth 6.47%.

6. Monthly Average Revenue per User (ARPU) for wireless service increased by 2.33%, from Rs.142.32 in QE Mar-23 to Rs.145.64 in QE Jun-23. On Y-O-Y basis, monthly ARPU for wireless service increased by 9.05% in this quarter.

7. Prepaid ARPU per month increased from Rs.139.63 in QE Mar-23 to Rs.143.81 in QE Jun-23, however, Postpaid ARPU per month decreased from Rs.173.50 in QE Mar-23 to Rs.166.22 in QE Jun-23.

8. On an all-India average, the overall MOU per subscriber per month increased by 1.45% from 946 in Q.E. Mar-2023 to 960 in Q.E. Jun-2023.

9. Prepaid MOU per subscriber per month increased from 983 in QE Mar-23 to 1000 in QE Jun-23. Postpaid MOU per subscriber per month decreased from 518 in QE Mar-23 to 509 in QE Jun-23.

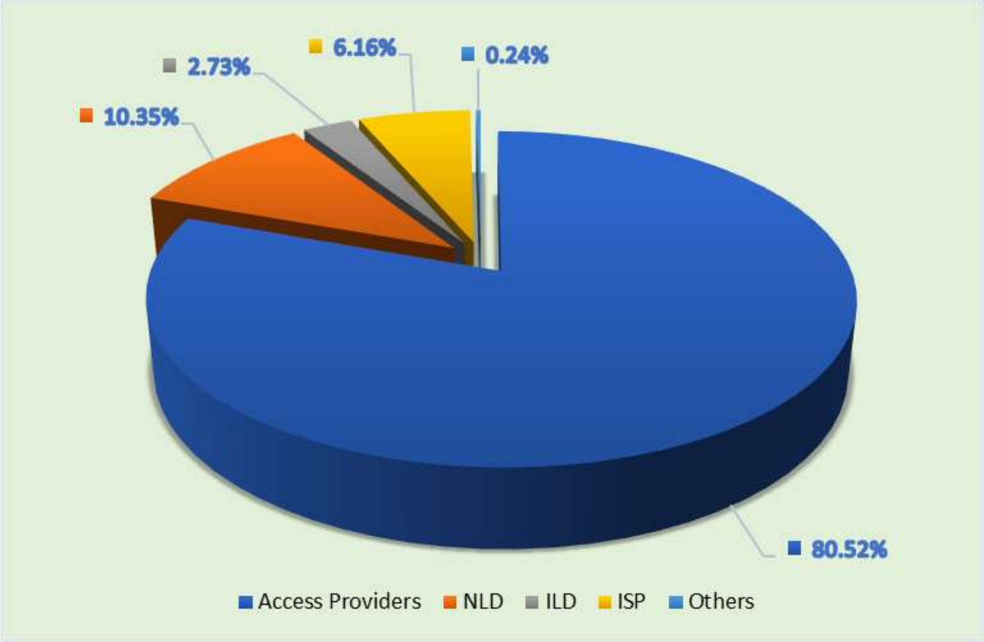
10. Gross Revenue (GR), Applicable Gross Revenue (ApGR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the Q.E. Jun-23 has been Rs.80,899/- Crore, Rs.78,349 crore and Rs.65,624/- Crore respectively. GR decreased by 5.22%, ApGR decreased by 0.36% and AGR increased by 1.75% in Q.E. Jun-23, as compared to previous quarter.

11. The Y-O-Y rate of growth in GR, ApGR and AGR in Q.E. Jun-23 over the same quarter in last year has been 5.88%, 6.17% and 8.42% respectively.

12. Pass-through charges decreased from Rs.14,725 Crore in QE Mar-23 to Rs.13,220 Crore in QE Jun-23 with quarterly rate of decline 10.22%. The Y-O-Y rate of decline 1.46% has been recorded in pass-through charges for QE Jun-23.

13. The License Fee increased from Rs.5,159 Crore for the QE Mar-23 to Rs.5,246 Crore for the QE Jun-23. The quarterly and the Y-O-Y rates of growth in license fee are 1.69% and 8.30% respectively in this quarter.

Service-wise composition of Adjusted Gross Revenue

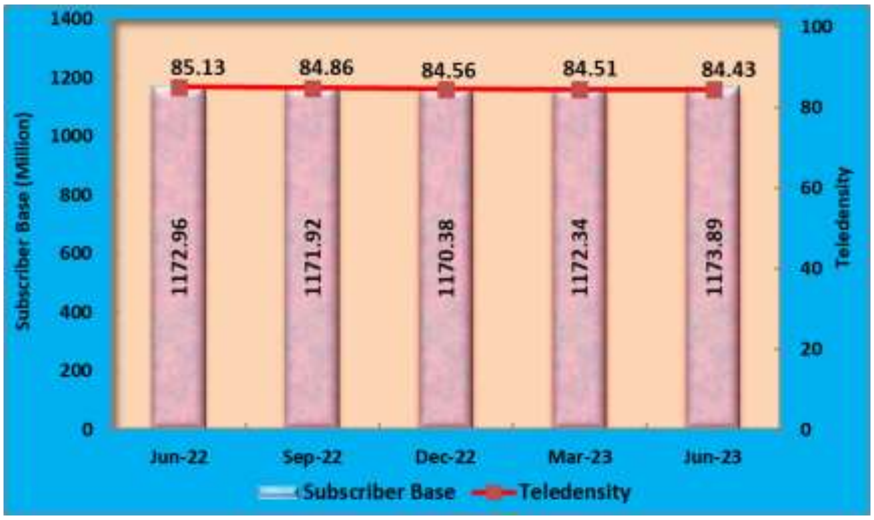


14. Access services contributed 80.52% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Applicable Gross Revenue (ApGR), Adjusted Gross Revenue (AGR), License Fee, Spectrum Usage Charges (SUC) and Pass Through Charges increased by -6.34%, -0.06%, 2.34%, 2.20%, 8.41% and -11.90% respectively in QE Jun-23.

15. The number of telephone subscribers in India increased from 1,172.34 million at the end of Mar-23 to 1,173.89 million at the end of Jun-23, registering a growth rate of 0.13% over the previous quarter. This reflects Year-On-Year (Y-O-Y) rate of growth 0.08% over the same quarter of the

last year. The overall Tele-density in India decreased from 84.51% as in QE Mar-23 to 84.43% as in QE Jun-23.

Trends in Telephone subscribers and Tele-density in India

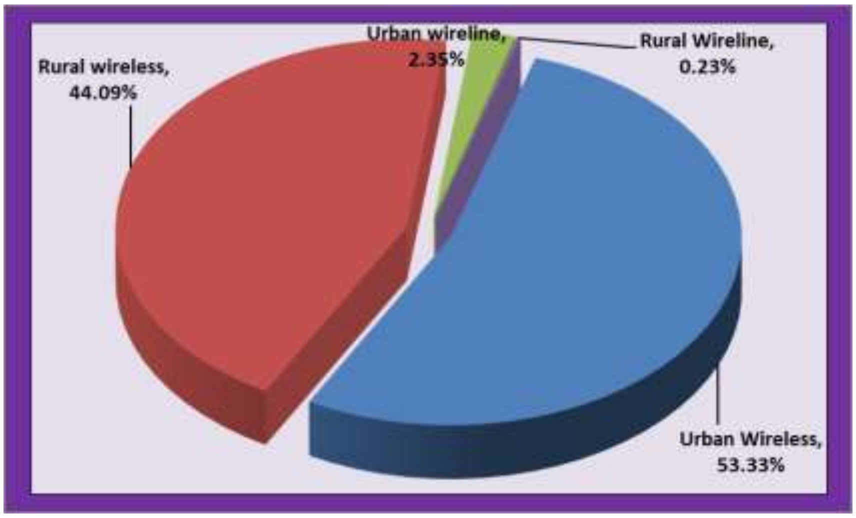


16. Telephone subscribers in Urban areas decreased from 653.71 million at the end of Mar-23 to 653.70 million at the end of Jun-23 and Urban Tele-density also decreased from 133.81% to 133.19% during the same period.

17. Rural telephone subscribers increased from 518.63 million at the end of Mar-23 to 520.19 million at the end of Jun-23 and Rural Tele-density also increased from 57.71% to 57.83% during the same period.

18. Out of the total subscription, the share of Rural subscription increased from 44.24% at the end of Mar-23 to 44.31% at the end of Jun-23.

Composition of Telephone Subscribers



19. With a net decrease of 0.35 million subscribers during the quarter, the total wireless subscriber base decreased from 1,143.93 million at the end of Mar-23 to 1,143.58 million at the end of Jun-23, registering a rate of decline 0.03% over the previous quarter. On Y-O-Y basis, wireless subscriptions decreased at the rate of 0.33% during the year.

20. Wireless Tele-density decreased from 82.46% at the end of Mar-23 to 82.25% at the end of Jun-23 with quarterly rate of decline 0.25%.

21. During this quarter, the following parameters in terms of QoS benchmarks have been fully complied by wireline service providers: -

   i. Fault incidences No. of faults per 100 subs/month ≤ 7
   ii. Point of Interconnection'(POI) Congestion (No. of PoIs not meeting benchmark) ≤ 0.5%
   iii. Metering and billing credibility- post-paid ≤ 0.1%
   iv. Metering and billing credibility- pre-paid ≤ 0.1%
   v. Resolution of billing/charging/Credit & validity complaints 98% within 4 weeks
   vi. Resolution of billing/charging Credit & validity complaints 100% within 6 weeks
   vii. Period of applying credit/waiver/adjustment to customer's 100% within 1 week of resolution of complaint

22. The following parameters have shown improvement, as compared to the previous quarter, in QoS by wireline service providers: -

- % Fault repaired by next working day (for urban areas) ≥ 85%
- % Fault repaired within 5 days (for urban areas) 100%
- % Fault repaired within 7 days (for rural and hilly areas) 100%
- 'Mean time to Repair' (MTTR) ≤ 10Hs
- Termination / closure of service ≤ 7 days

23. The following parameters have shown deterioration as compared to the previous quarter, in QoS by wireline service providers: -

- ❖ Accessibility of call centre/ customer care ≥ 95%
- ❖ % age of calls answered by the operators (voice to voice) within ninety seconds ≥ 95%

24. During this quarter, list of Parameters which are fully complied, as compared to the previous quarter, by all the Cellular Mobile service providers: -

   i. BS Accumulated down-time (not available for service) (%age) ≤ 2%
   ii. Call Set-up Success Rate and Session Establishment Success Rate for Circuit Switched Voice or VoLTE as applicable (within licensee's own network) ≥ 95%
   iii. SDCCH/ Paging Channel Congestion/ RRC Congestion (% age) ≤ 1%
   iv. TCH, RAB and E-RAB congestion (%age) ≤ 2%
   v. Network QoS DCR Spatial Distribution Measure [Network_ QSD (90,90)] ≤ 2%
   vi. Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] ≤ 3%
   vii. Connections with good voice quality, Circuit Switched Voice Quality and VoLTE quality ≥ 95%
   viii. Down Link (DL) Packet Drop Rate or DL-PDR ≤ 2%
   ix. Up Link (UL) Packet Drop Rate or UL-PDR ≤ 2%
   x. Point of Interconnection (POI) Congestion (No. of POIs not meeting the benchmark) ≤ 0.5%
   xi. Metering and billing credibility - postpaid ≤ 0.1%
   xii. Metering and billing credibility – prepaid ≤ 0.1%
   xiii. Resolution of billing/charging/validity complaints - 98% within 4 weeks
   xiv. Resolution of billing/charging/validity complaints - 100% within 6 weeks

xv. Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution - within 1 week of resolution of complaint

xvi. Termination / Closure of service < 7 days

xvii. Time taken for refund of deposits after closures (100% within 60 days).

25. The following parameters have shown improvement, as compared to the previous quarter, in QoS by Cellular Mobile service providers: -

- ❖ Percentage of calls answered by the operators (voice to voice) within ninety seconds ≥ 95%

26. The following parameters have shown deteriorated, as compared to the previous quarter, in QoS by Cellular Mobile service providers: -

- ❖ Worst affected BSs due to down-time (%age) < 2%
- ❖ Accessibility of call centre/ customer care ≥ 95%

27. A total of approximately 903 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/both uplinking & downlinking.

28. As per the reporting done by broadcasters in pursuance of the Tariff Order dated 3rd March 2017, as amended, out of 892 permitted satellite TV channels which are available for downlinking in India, there are 360 satellite pay TV channels as on 30th June, 2023. Out of 360 pay channels, 256 are SD satellite pay TV channels and 104 are HD satellite pay TV channels.

29. Since the introduction of DTH Sector in the year 2003, Indian DTH (direct-to-home) services have displayed a phenomenal growth. During the QE 30th June 2023, there were 4 pay DTH service providers in the country.

30. Pay DTH has attained total active subscriber base of around 65.50 million. This is in addition to the subscribers of the DD Free Dish (free DTH services of Doordarshan). The total active subscriber base has increased from 65.25 million in QE March 2023 to 65.50 million in QE June 2023.

31. Apart from the radio channels operated by All India Radio – the public broadcaster, as per the data reported by FM Radio operators to TRAI, as on 30th June 2023, there are 388 operational private FM Radio channels in 113 cities operated by 36 private FM Radio operators. As compared to the previous quarter, there is no change in the number of operational private FM Radio channels, cities and FM Radio operators.

32. The advertisement revenue reported by FM Radio operators during the quarter ending 30th June 2023 in respect of 388 private FM Radio channels is Rs.389.97 crore as against Rs.388.97 crore in respect of 388 private FM Radio channels for the previous quarter.

33. As on 30th June, 2023, 446 Community Radio stations are operational.

SNAPSHOT

(Data as on Q.E. 30th June, 2023)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,173.89 Million
% change over the previous quarter	0.13%
Urban Subscribers	653.70 Million
Rural Subscribers	520.19 Million
Market share of Private Operators	90.60%
Market share of PSU Operators	9.40%
Tele-density	84.43%
Urban Tele-density	133.19%
Rural Tele-density	57.83%
Wireless Subscribers	
Total Wireless Subscribers	1,143.58 Million
% change over the previous quarter	-0.03%
Urban Subscribers	626.07 Million
Rural Subscribers	517.51 Million
Market share of Private Operators	91.11%
Market share of PSU Operators	8.89%
Tele-density	82.25%
Urban Tele-density	127.56%
Rural Tele-density	57.53%
Total Wireless Data Usage during the quarter	44,967 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	64,839
Number of Very Small Aperture Terminals (VSAT)	2,52,823
Wireline Subscribers	
Total Wireline Subscribers	30.31 Million
% change over the previous quarter	6.70%
Urban Subscribers	27.63 Million
Rural Subscribers	2.68 Million
Market share of PSU Operators	31.04%
Market share of Private Operators	68.96%
Tele-density	2.18%
Rural Tele-density	0.30%
Urban Tele-density	5.63%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	36,259

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs. 80,899 Crore
% change in GR over the previous quarter	-5.22%
Applicable Gross Revenue (ApGR) during quarter	Rs. 78,349 Crore
% change in ApGR over the previous quarter	-0.36%
Adjusted Gross Revenue (AGR) during the quarter	Rs. 65,624 Crore
% change in AGR over the previous quarter	1.75%
Share of Public sector undertakings in Access AGR	4.15%
Internet/Broadband Subscribers	
Total Internet Subscribers	895.83 Million
% change over previous quarter	1.65%
Narrowband subscribers	34.36 Million
Broadband subscribers	861.47 Million
Wired Internet Subscribers	35.54 Million
Wireless Internet Subscribers	860.29 Million
Urban Internet Subscribers	530.12 Million
Rural Internet Subscribers	365.71 Million
Total Internet Subscribers per 100 population	64.43
Urban Internet Subscribers per 100 population	108.01
Rural Internet Subscribers per 100 population	40.66
No. of Public Wi-Fi Hotspots	1,65,727
Aggregate Data Consumed (GB)	69,50,508
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking only/both uplinking and downlinking	903
Number of Pay TV Channels as reported by broadcasters	360
Number of private FM Radio Stations (excluding All India Radio)	388
Number of total active subscribers with pay DTH operators	65.50 Million
Number of Operational Community Radio Stations	446
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.145.64
Minutes of Usage (MOU) per subscriber per month - Wireless Service	960 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	75.34 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	18.39 GB
Average revenue realization per GB for wireless data usage during the quarter	Rs.9.44