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TELECOM REGULATORY AUTHORITY OF INDIA

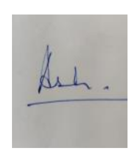
New Delhi, the 27 April, 2021

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

“Indian Telecom Services Performance Indicator Report” for the Quarter ending October - December, 2020

TRAI today has released the **“Indian Telecom Services Performance Indicator Report”** for the Quarter ending 31st December, 2020. 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, 2020 to 31st December, 2020 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, Shri Amit Sharma, Advisor (F&EA), TRAI may be contacted on Tel. +91-11-23234367, and e-mail: advfea2@trai.gov.in.



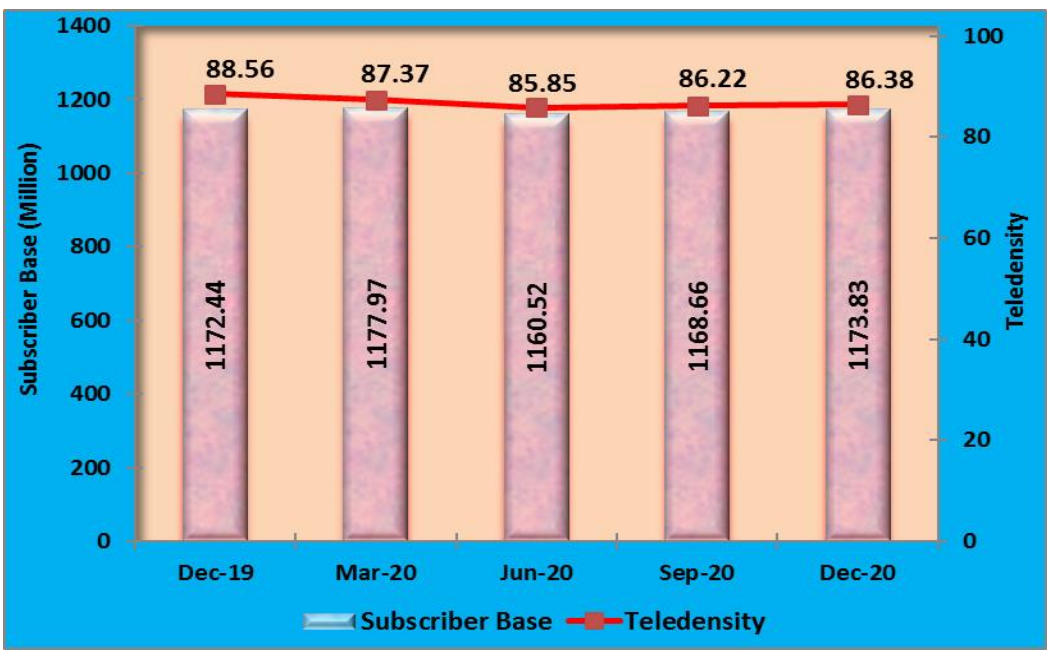
For Secretary, TRAI

The Indian Telecom Services Performance Indicators
October – December, 2020

Executive Summary

1. The number of telephone subscribers in India increased from 1,168.66 million at the end of Sep-20 to 1,173.83 million at the end of Dec-20, registering a growth rate of 0.44% over the previous quarter. This reflects Year-On-Year (Y-O-Y) growth rate of 0.12% over the same quarter of the last year. The overall Tele-density in India also increased from 86.22% as in QE Sep-20 to 86.38% as in QE Dec-20.

Trends in Telephone subscribers and Tele-density in India

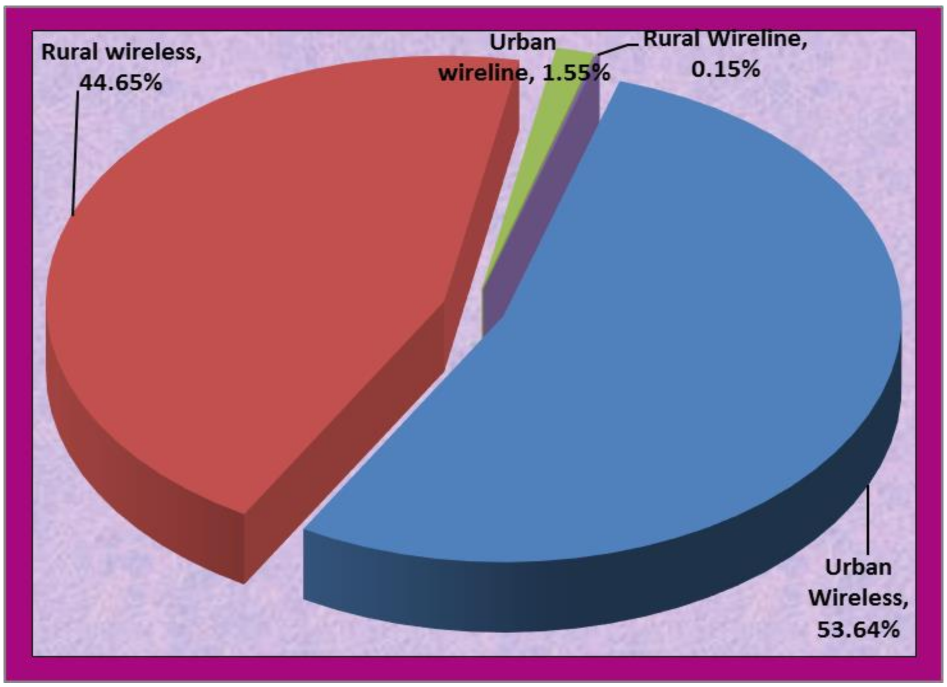


2. Telephone subscribers in Urban areas increased from 644.26 million at the end of Sep-20 to 647.91 million at the end of Dec-20 and Urban Tele-density also increased from 138.25% to 138.34% during the same period.

3. Rural telephone subscribers increased from 524.39 million at the end of Sep-20 to 525.92 million at the end of Dec-20 and Rural Tele-density also increased from 58.96% to 59.05% during the same period.

4. Out of the total subscription, the share of Rural subscription decreased from 44.87% at the end of Sep-20 to 44.80% at the end of Dec-20.

Composition of Telephone Subscribers



5. With a net increase of 5.19 million subscribers during the quarter, the total wireless subscriber base increased from 1,148.58 million at the end of Sep-20 to 1,153.77 million at the end of Dec-20, registering a growth rate of 0.45% over the previous quarter. On Y-O-Y basis, wireless subscriptions also increased at the rate of 0.20% during the year.

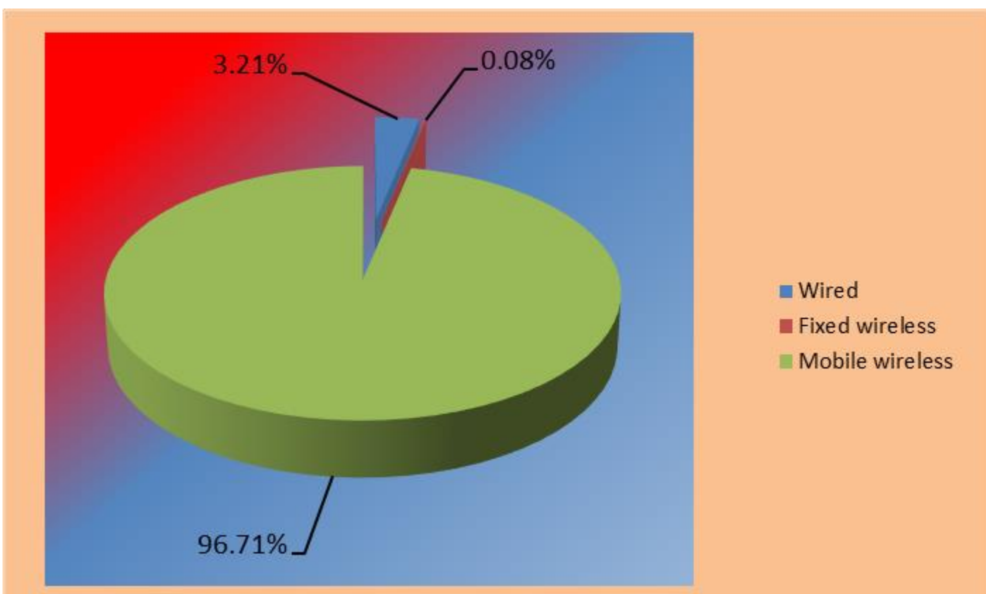
6. Wireless Tele-density increased from 84.74% at the end of Sep-20 to 84.90% at the end of Dec-20 with quarterly growth rate of 0.19%.

7. Wireline subscribers decreased from 20.08 million at the end of Sep-20 to 20.05 million at the end of Dec-20 with a quarterly decline rate of 0.12% and, on Y-O-Y basis, wireline subscriptions also declined by 4.53% at the end of QE Dec-20.

8. Wireline Tele-density remained same i.e. 1.48% at the end of Dec, 2020, as it was at the end of Sep-20.

9. Total number of Internet[1] subscribers increased from 776.45 million at the end of Sep-20 to 795.18 million at the end of Dec-20, registering a quarterly growth rate of 2.41%. Out of 795.18 million internet subscribers, number of Wired Internet subscribers are 25.54 million and number of Wireless Internet subscribers are 769.64 million.

Composition of internet subscription



[1] Internet: Interconnected global networks that use the internet protocol.

10. The Internet subscriber base is comprised of Broadband[2] Internet subscriber base of 747.41 million and Narrowband[3] Internet subscriber base of 47.77 million.

11. The broadband Internet subscriber base increased by 2.90% from 726.32 million at the end of Sep-20 to 747.41 million at the end of Dec-20. However, the narrowband Internet subscriber base declined by 4.72% from 50.14 million at the end of Sep-20 to 47.77 million at the end of Dec-20.

12. Monthly Average Revenue per User (ARPU)[4] for wireless service increased by 4.93%, from ₹96.87 in QE Sep-20 to ₹101.65 in QE Dec-20. On Y-O-Y basis, monthly ARPU for wireless service increased by 29.24% in this quarter.

13. Prepaid ARPU per month increased from to ₹90 in QE Sep-20 to ₹95 in QE Dec-20, however, Postpaid ARPU per month decreased from ₹234 in QE Sep-20 to ₹227 in QE Dec-20.

14. On all India average, the overall Minutes of Usage (MOU)[5] per subscriber per month for wireless service increased by 3.14% from 761 in QE Sep-20 to 785 in QE Dec-20.

15. Prepaid MOU per subscriber per month increased from 765 in QE Sep-20 to 793 in QE Dec-20. Postpaid MOU per subscriber per month decreased from 680 in QE Sep-20 to 631 in QE Dec-20.

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[2] Broadband: Internet access with a minimum capacity of greater or equal 512 Kbit/s in one or both directions.
[3] Narrowband: Internet access with a capacity of less than 512 Kbit/s in one or both directions.
(Source-ITU)

[4] ARPU per month is calculated by dividing net subscribers' revenue by average number of subscribers.
[5] MOU per subscriber per month is calculated by dividing total minutes of usage (incoming & outgoing) by average number of subscribers.

16. Gross Revenue[6] (GR) and Adjusted Gross Revenue[7] (AGR) of Telecom Service Sector for the Q.E. Dec-20 has been ₹71,588 Crore and ₹47,623 Crore respectively. GR and AGR increased by 4.92% and 4.19% respectively in Q.E. Dec-20 as compared to previous quarter.

17. The Y-O-Y growth in GR and AGR in Q.E. Dec-20 over the same quarter in last year has been 12.27% and 16.50% respectively.

18. Pass-through[8] charges increased from ₹22,521 Crore in QE Sep-20 to ₹23,966 Crore in QE Dec-20 with quarterly growth rate of 6.41%. The Y-O-Y growth rate of 4.71% has been recorded in pass-through charges for QE Dec-20.

19. The License Fee[9] increased from ₹3,656 Crore for the QE Sep-20 to ₹3,809 Crore for the QE Dec-20. The quarterly and the Y-O-Y growth rates of license fee are 4.19% and 16.49% respectively in this quarter.

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[6] Gross Revenue is inclusive of installation charges, late fees, sale proceeds of handsets (or any other terminal equipment etc.), revenue on account of interest, dividend, value added services, supplementary services, access or interconnection charges, roaming charges, revenue from permissible sharing of infrastructure and any other miscellaneous revenue, without any set-off for related item of expense etc.

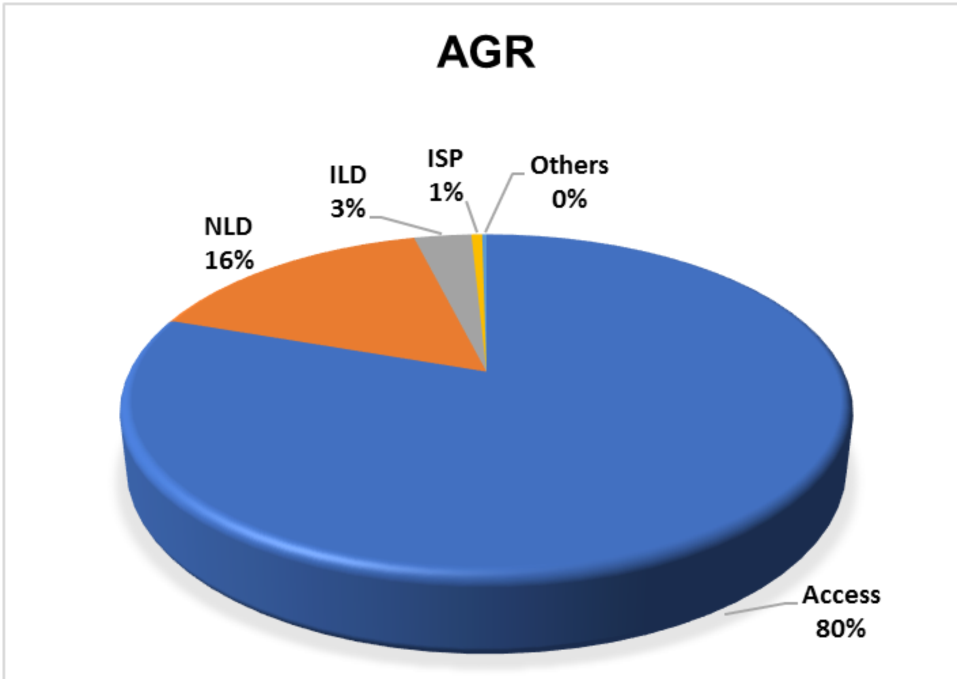
[7] Adjusted Gross Revenue: The following shall be excluded from the Gross Revenue to arrive at the AGR:

I. PSTN related call charges (Access Charges) actually paid to other eligible/entitled telecommunication service providers within India;
II. Roaming revenues actually passed on to other eligible/entitled telecommunication service providers; and
III. Service Tax on provision of service and Sales Tax actually paid to the Government if gross revenue had included as component of Sales Tax and Service Tax

[8] Pass through charges means the charges excluded from gross revenue to arrive at adjusted gross revenue for the purpose of levying licence fee.

[9] License Fee means a fee payable by Licensee at prescribed intervals and rates for the period of the Licence.

Service-wise composition of Adjusted Gross Revenue



20. Access services contributed 80% 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)[10] and Pass Through Charges increased by 4.98%, 5.38%, 5.39%, 6.06% and 4% respectively in QE Dec-20.

21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, increased from ₹103.87 in QE Sep-20 to ₹108.78 in QE Dec-20.

[10] Spectrum Usage Charge is payable by the licensees providing mobile access services, as a percentage of their Adjusted Gross Revenue (AGR).

(Source – DoT License Agreement)

22. 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	Parameters showing deterioration in QoS
❖ % Fault repaired by next working day (for urban areas) ≥ 85% ❖ % Fault repaired by next working day (for rural and hilly areas) ≥ 75% ❖ "Mean time to Repair" (MTTR) ≤10 Hrs ❖ Metering and billing credibility - post-paid, ≤ 0.1% ❖ "Response time to the customer for assistance" Accessibility of call centre/ customer care 95% ❖ "Response time to the customer for assistance" %age of calls answered by the operators (voice to voice) within 90 seconds ≥ 95% ❖ "Termination/closure of service"- %age of request for Termination/closure of service complied within 7 days 100%	❖ "Fault repair" Fault incidences No. of faults per 100 subs/month) ≤ 7

23. The performance of Cellular Mobile service providers in terms of Quality of Service (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
❖ TCH, RAB and E-RAB Congestion (%age) ❖ Network QoS DCR Spatial Distribution Measure [Network_ QSD (90,90)] ❖ Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] ❖ Resolution of billing/charging/validity complaints ❖ Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution of complaints ❖ %age of calls answered by the operators (voice to voice) within 90 seconds ❖ %age requests for Termination / Closure of service complied within 7 days ❖ Time taken for refund of deposits after closures	❖ Worst affected BSs due to down-time (%age) ❖ Up Link (UL) Packet Drop Rate or UL-PDR ❖ Accessibility of call centre/ customer care

24. A total number of 907 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/both uplinking and downlinking, as on 31st December, 2020.

25. As per the reporting done by broadcasters in pursuance of the Tariff Order (Broadcasting & Cable), dated 3rd March 2017, as amended, there are 326 pay channels as on 31st December 2020, which include 233 SD (standard definition) pay TV channels and 93 HD (high definition) Pay TV channels.

26. Since its introduction in the year 2003, DTH (direct-to-home) service has displayed a phenomenal growth. During QE 31st December 2020, there were 4 pay DTH service providers in the country.

27. Pay DTH has attained total active subscriber base of around 70.99 million in QE 31st December 2020. This is in addition the subscribers of DTH Free Dish (free DTH services of Doordarshan).

28. Apart from the radio stations operated by All India Radio – the public broadcaster, as on 31st December 2020, there are 367 operational private FM Radio stations in 105 cities with operational 31 Private FM Radio broadcasters are same as previous quarter.

29. The reported advertisement revenue during the quarter ending 31st December 2020 in respect of 366 private FM Radio stations is ₹323.01 crore as against ₹198.53 crore in respect of 366 private FM Radio stations for the previous quarter.

30. As per data received from MIB, as on 31st December 2020, 315 Community Radio Stations are operational in the country.

Snapshot

(Data as on Q.E. 31st December, 2020)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,173.83 Million
% change over the previous quarter	0.44%
Urban Subscribers	647.91 Million
Rural Subscribers	525.92 Million
Market share of Private Operators	88.74%
Market share of PSU Operators	11.26%
Tele-density	86.38%
Urban Tele-density	138.34%
Rural Tele-density	59.05%
Wireless Subscribers	
Total Wireless Subscribers	1,153.77 Million
% change over the previous quarter	0.45%
Urban Subscribers	629.67 Million
Rural Subscribers	524.11 Million
Market share of Private Operators	89.42%
Market share of PSU Operators	10.58%
Tele-density	84.90%
Urban Tele-density	134.44%
Rural Tele-density	58.85%
Total Wireless Data Usage during the quarter	26,405 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	63,205
Number of Very Small Aperture Terminals (VSAT)	2,96,079
Wireline Subscribers	
Total Wireline Subscribers	20.05 Million
% change over the previous quarter	-0.12%
Urban Subscribers	18.24 Million
Rural Subscribers	1.81 Million
Market share of PSU Operators	50.51%
Market share of Private Operators	49.49%
Tele-density	1.48%
Rural Tele-density	0.20%
Urban Tele-density	3.89%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	137,015

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹71,588 Crore
% change in GR over the previous quarter	4.92%
Adjusted Gross Revenue (AGR) during the quarter	₹47,623 Crore
% change in AGR over the previous quarter	4.19%
Share of Public sector undertakings in Access AGR	6.55%
Monthly Average Revenue Per User (ARPU) for Access Services	₹108.78
Internet/Broadband Subscribers	
Total Internet Subscribers	795.18 Million
% change over previous quarter	2.41%
Narrowband subscribers	47.77 Million
Broadband subscribers	747.41 Million
Wired Internet Subscribers	25.54 Million
Wireless Internet Subscribers	769.64 Million
Urban Internet Subscribers	487.01 Million
Rural Internet Subscribers	308.17 Million
Total Internet Subscribers per 100 population	58.51
Urban Internet Subscribers per 100 population	103.98
Rural Internet Subscribers per 100 population	34.60
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	907
Number of Pay TV Channels as reported by broadcasters	326
Number of private FM Radio Stations (excluding All India Radio)	367
Number of total active subscribers with pay DTH operators	70.99 Million
Number of Operational Community Radio Stations	315
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	₹101.65
Minutes of Usage (MOU) per subscriber per month - Wireless Service	785 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	177.22 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	12.13 GB
Average revenue realization per subscriber per GB wireless data during the quarter	₹11.01