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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 17th September, 2020

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

"Indian Telecom Services Performance Indicator Report" for the Quarter ending January-March, 2020

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 31st March, 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 January, 2020 to 31st March, 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, 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

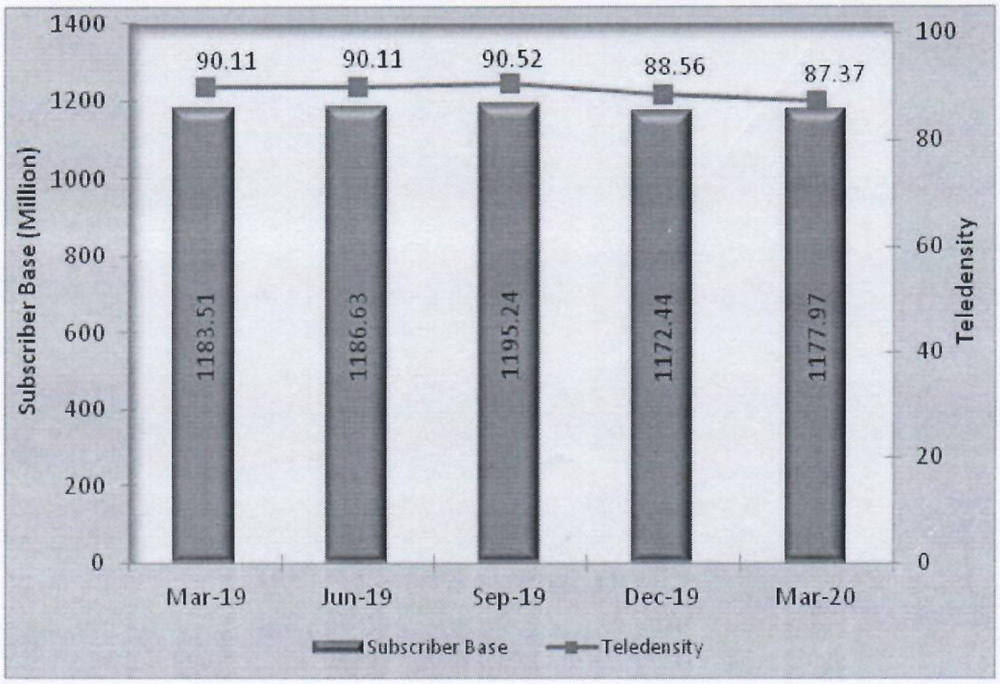
(S. K. Mishra)
Pr. Advisor (F&EA)

The Indian Telecom Services Performance Indicators
January – March, 2020

Executive Summary

1. The number of telephone subscribers in India increased from 1,172.44 million at the end of Dec-19 to 1,177.97 million at the end of Mar-20, registering a growth rate of 0.47% over the previous quarter. This reflects Year-On-Year (Y-O-Y) decline rate of 0.47% over the same quarter of the last year. The overall Tele-density in India decreased from 88.56 as in QE Dec-19 to 87.37 as in QE Mar-20.

Trends in Telephone subscribers and Tele-density in India

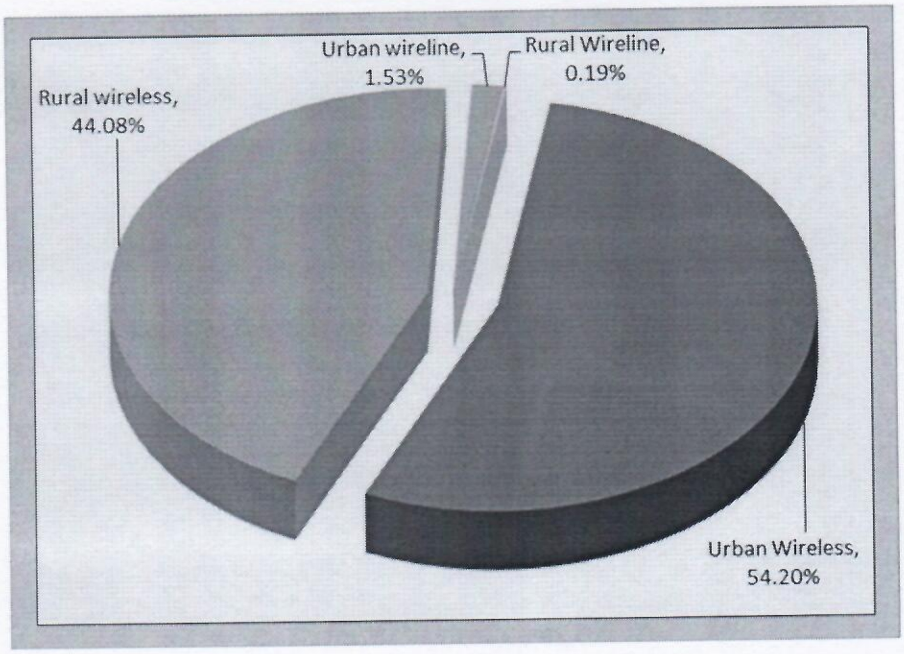


2. Telephone subscribers in Urban areas decreased from 662.45 million at the end of Dec-19 to 656.46 million at the end of Mar-20 and Urban Tele-density also declined from 156.26 to 142.31 during the same period.

3. Rural telephone subscribers increased from 509.99 million at the end of Dec-19 to 521.51 million at the end of Mar-20 and Rural Tele-density also increased from 56.67 at the end of Dec-19 to 58.79 at the end of Mar-20 during the same period.

4. Out of the total subscription, the share of Rural subscription increased from 43.50% at the end of Dec-19 to 44.27% at the end of Mar-20.

Composition of Telephone Subscribers



5. With a net addition of 6.31 million subscribers during the quarter, the total wireless subscriber base increased from 1,151.44 million at the end of Dec-19 to 1,157.75 million at the end of Mar-20, registering a growth rate of 0.55% over the previous quarter. Wireless subscriptions decreased on Y-O-Y basis at the rate of 0.35% during the year.

6. Wireless Tele-density declined from 86.98 at the end of Dec-19 to 85.87 at the end of Mar-20 with quarterly decline rate of 1.28%.

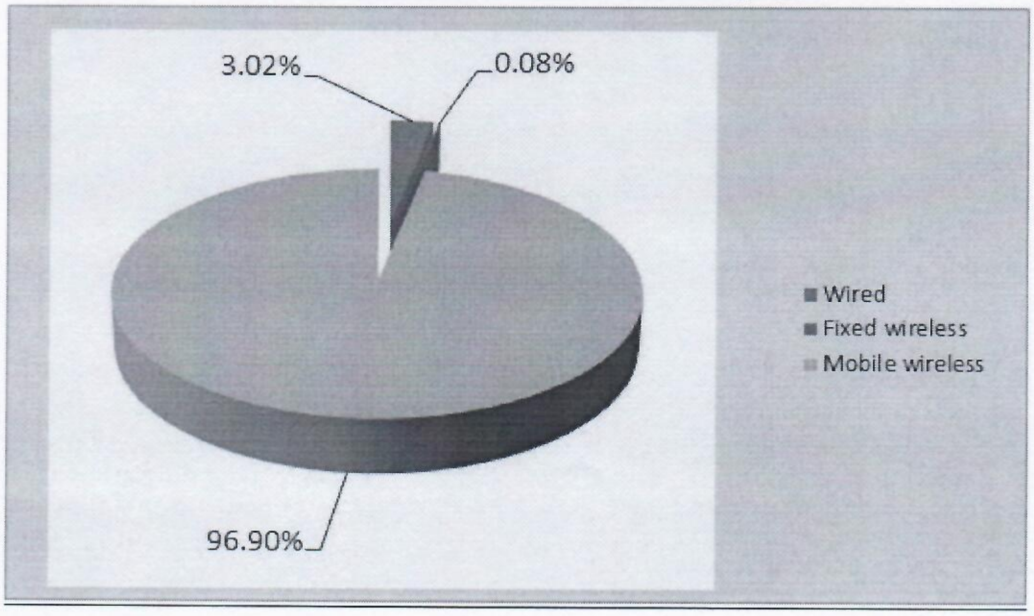
7. Wireline subscribers decreased from 21 million at the end of Dec-19 to 20.22 million at the end of Mar-20 with a quarterly decline rate of

3.74% and on a Y-O-Y basis, wireline subscriptions also declined by 6.81% in QE Mar-20.

8. Wireline Tele-density decreased from 1.59 at the end of Dec-19 to 1.50 at the end of Mar-20.

9. Total number of Internet[1] subscribers increased from 718.74 million at the end of Dec-19 to 743.19 million at the end of Mar-20, registering a quarterly growth rate of 3.40%. Out of 718.74 million internet subscribers, number of Wired Internet subscribers are 22.42 million and number of Wireless Internet subscribers are 720.78 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband[2] Internet subscriber base of 687.44 million and Narrowband[3] Internet subscriber base of 55.75 million.

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

11. The broadband Internet subscriber base increased by 3.85% from 661.94 million at the end of Dec-19 to 687.44 million at the end of Mar-20. However, the narrowband Internet subscriber base declined by 1.85% from 56.81 million at the end of Dec-19 to 55.75 million at the end of Mar-20.

12. Monthly Average Revenue per User (ARPU)[4] for wireless service increased by 16.33%, from `78.65 in QE Dec-19 to `91.49 in QE Mar-20. On Y-O-Y basis, monthly ARPU for wireless service increased by 28.15% in this quarter.

13. Prepaid ARPU per month increased from `70 in QE Dec-19 to `84 in QE Mar-20 however for Postpaid ARPU per month decreased from `262 in QE Dec-19 to `244 in QE Mar-20.

14. On an all India average, the overall Minutes of Usage (MOU)5 per subscriber per month for wireless service increased by 5.34% from 712 in QE Dec-19 to 750 in QE Mar-20.

15. Prepaid MOU per subscriber per month increased from 716 in QE Dec-19 to 757 in QE Mar-20. However, Postpaid MOU per subscriber per month decreased from 632 in QE Dec-19 to 611 in QE Mar-20.

16. Gross Revenue6 (GR) and Adjusted Gross Revenue7 (AGR) of Telecom Service Sector for the Q.E. Mar-20 has been `67,533.74 Crore and

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[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.

[6] 1. 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

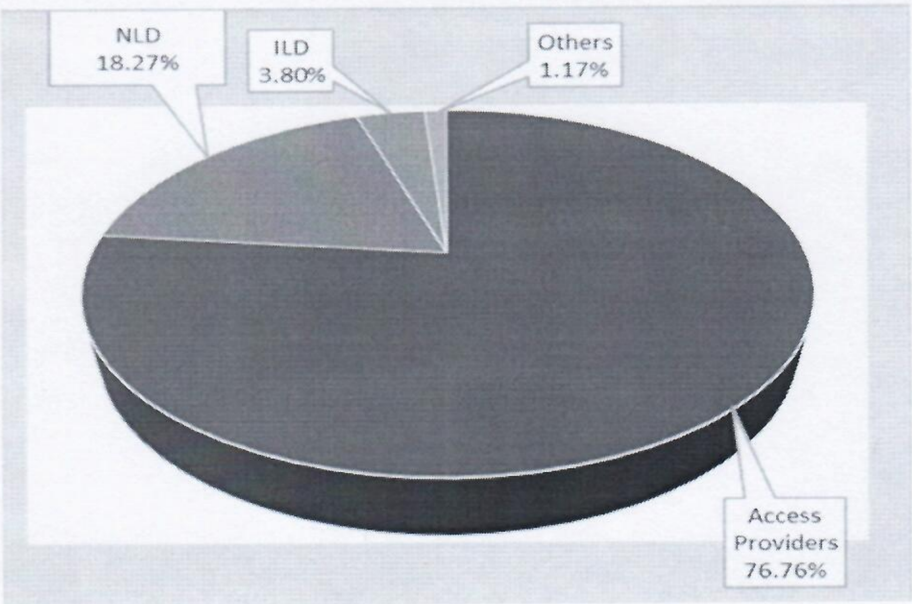
`44,940.32 Crore respectively. GR and AGR increased by 5.91% and 9.94% respectively in Q.E. Mar-20 as compared to previous quarter.

17. The Y-O-Y growth in GR and AGR in Q.E. Mar-20 over the same quarter in last year has been 15.61% and 25.07% respectively.

18. Pass-through[8] charges decreased from `22,887 Crore in QE Dec-19 to `22,593 Crore in QE Mar-20 with quarterly decline rate of 1.28%. The Y-O-Y growth rate of 0.50% has been recorded in pass-through charges for QE Mar-20.

19. The License Fee[9] increased from `3,270 Crore for the QE Dec-19 to `3,604 Crore for the QE Mar-20. The quarterly and the Y-O-Y growth rates of license fee are 10.21% and 24.80% respectively in this quarter.

Service-wise composition of Adjusted Gross Revenue



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.

20. Access services contributed 76.76% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Adjusted Gross Revenue (AGR), License Fee and Spectrum Usage Charges (SUC)[10] increased by 8.24%, 13.76%, 14.05% and 13.59% respectively in QE Mar-20. However, Pass Through Charges declined quarterly by 2.59% during the same period.

21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, increased from `85.07 in QE Dec-19 to `97.64 in QE Mar-20.

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**
• No improvement in this quarter as compared to the previous quarter has been observed	• "Mean time to Repair" (MTTR) ≤10Hs • "Response time to the customer for assistance" ≥ 95% • %age of calls answered by the operators (voice to voice) within 90 seconds ≥ 95% • Time taken for refund of deposits after closures 100% within 60 days

[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)

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
• Accessibility of call centre/ customer care • %age of calls answered by the operators (voice to voice) within 90 sec	• 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)] • Metering and billing credibility - post paid • Resolution of billing/charging/ validity complaints (98% within 4 weeks) • Resolution of billing/charging/ validity complaints (100% within 6 weeks) • Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution of complaints • Time taken for refund of deposits after closures

24. A total number of 926 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 March, 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 333 pay channels as on 31st March, 2020, which include 235 SD (standard definition) pay TV channels and 98 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 the QE 31st March, 2020, there were 4 pay DTH service providers in the country.

27. Pay DTH has attained total active subscriber base of around 70.26 million in QE 31st March, 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 March 2020, there are 368 operational private FM Radio stations in 105 cities with operational 32 Private FM Radio broadcasters as compared to 368 private FM Radio Stations in 105 cities with operational 33 FM Radio broadcasters in the previous quarter.

29. The reported advertisement revenue during the quarter ending 31st March, 2020 in respect of 367 private FM Radio stations is `400.64 crore as against `509.28 crore in respect of 367 private FM Radio stations for the previous quarter.

30. As per data received from MIB, as on 31st March, 2020, 290 Community Radio Stations are operational in the country.

Snapshot

(Data as on Q.E. 31st March, 2020)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,177.97 Million
% change over the previous quarter	0.47%
Urban Subscribers	656.46 Million
Rural Subscribers	521.51 Million
Market share of Private Operators	88.54%
Market share of PSU Operators	11.46%
Tele-density	87.37
Urban Tele-density	142.31
Rural Tele-density	58.79
Wireless Subscribers	
Total Wireless Subscribers	1,157.75 Million
% change over the previous quarter	0.55%
Urban Subscribers	638.48 Million
Rural Subscribers	519.27 Million
Market share of Private Operators	89.36%
Market share of PSU Operators	10.64%
Tele-density	85.87
Urban Tele-density	138.41
Rural Tele-density	58.54
Total Wireless Data Usage during the quarter	23,403 million GB
Number of Public Mobile Radio Trunk Services (PMRTS)	66,576
Number of Very Small Aperture Terminals (VSAT)	3,00,686
Wireline Subscribers	
Total Wireline Subscribers	20.22 Million
% change over the previous quarter	-3.74%
Urban Subscribers	17.97 Million
Rural Subscribers	2.24 Million
Market share of Private Operators	41.53%
Market share of PSU Operators	58.47%
Tele-density	1.50
Urban Tele-density	3.90
Rural Tele-density	0.25
No. of Village Public Telephones (VPT)	67,762
No. of Public Call Office (PCO)	1,73,291

Telecom Financial Data	
Gross Revenue (GR) during the quarter	`67,533.74 Crore
% change in GR over the previous quarter	5.91%
Adjusted Gross Revenue (AGR) during the quarter	`44,940.32 Crore
% change in AGR over the previous quarter	9.94%
Share of Public sector undertakings in Access AGR	7.91%
Monthly Average Revenue Per User (ARPU) for Access Services	`97.64
Internet/Broadband Subscribers	
Total Internet Subscribers	743.19 Million
% change over previous quarter	3.40%
Narrowband subscribers	55.75 Million
Broadband subscribers	687.44 Million
Wired Internet Subscribers	22.42 Million
Wireless Internet Subscribers	720.78 Million
Urban Internet Subscribers	457.23 Million
Rural Internet Subscribers	285.97 Million
Total Internet Subscribers per 100 population	55.12
Urban Internet Subscribers per 100 population	99.12
Rural Internet Subscribers per 100 population	32.24
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	926
Number of Pay TV Channels as reported by broadcasters	333
Number of private FM Radio Stations (excluding All India Radio)	368
Number of total active subscribers with pay DTH operators	70.26 Million
Number of Operational Community Radio Stations	290
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service (GSM including LTE)	`91.49
Minutes of Usage (MOU) per subscriber per month - Wireless Service (GSM including LTE)	750 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	181.34 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	11 GB
Average revenue realization per subscriber per GB wireless data during the quarter	11.23