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TELECOM REGULATORY AUTHORITY OF INDIA

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

"Indian Telecom Services Performance Indicator Report" for the Quarter ending July-September, 2019

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 30th September, 2019. 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 July, 2019 to 30th September, 2019 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

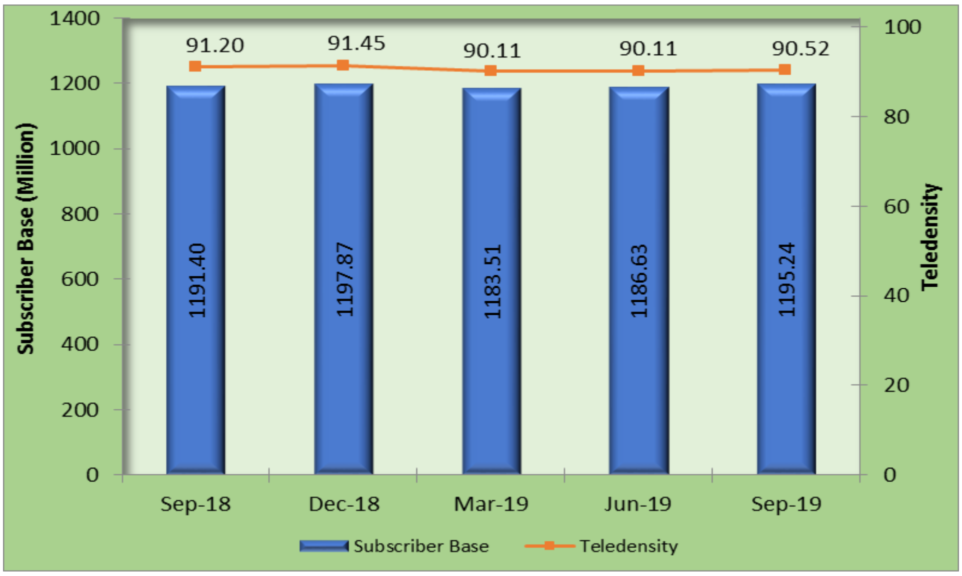
(S. K. Mishra)
Pr. Advisor (F&EA)

The Indian Telecom Services Performance Indicators
July – September, 2019

Executive Summary

1. The number of telephone subscribers in India increased from 1,186.63 million at the end of Jun-19 to 1,195.24 million at the end of Sep-19, registering a growth rate of 0.73% over the previous quarter. This reflects year-on-year (Y-O-Y) growth rate of 0.32% over the same quarter of last year. The overall Teledensity[1] in India increased from 90.11 as on QE Jun-19 to 90.52 as on QE Sep-19.

Trends in Telephone subscribers and Teledensity in India



2. Telephone subscription in Urban areas increased from 675.58 million at the end of Jun-19 to 677.95 million at the end of Sep-19. However, Urban Teledensity declined from 160.78 to 160.63 during the same period.

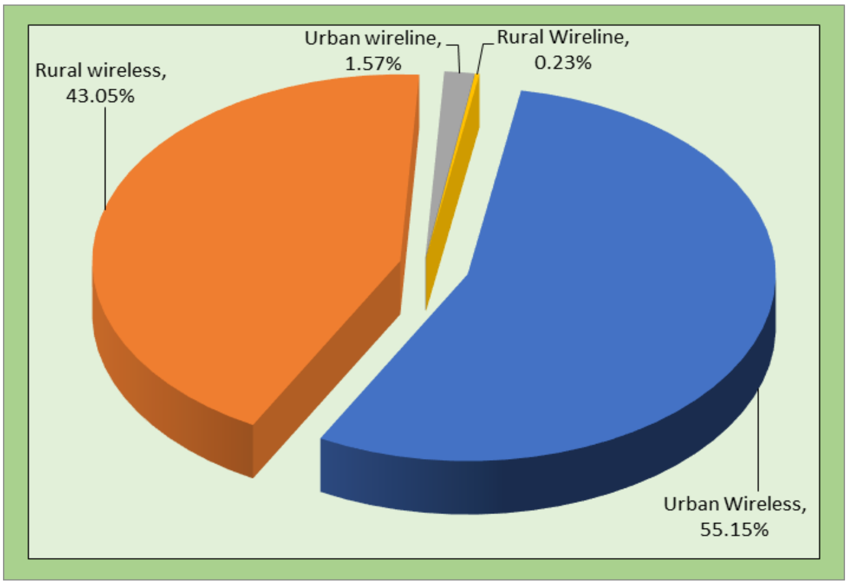
[1] Teledensity – Number of telephone connections (fixed lines and mobile phone subscribers) per 100 inhabitants within a geographical area.

(Source-ITU)

3. Rural telephone subscription increased from 511.05 million at the end of Jun-19 to 517.29 million at the end of Sep-19 and Rural Teledensity also increased from 56.99 at the end of Jun-19 to 57.59 at the end of Sep-19.

4. Out of the total subscription, the share of Rural subscription increased from 43.07% at the end of Jun-19 to 43.28% at the end of Sep-19.

Composition of Telephone Subscribers



5. With a net addition of 8.29 million subscribers during the quarter, total wireless subscriber base increased from 1,165.46 million at the end of Jun-19 to 1,173.75 million at the end of Sep-19, registering a growth rate of 0.71% over the previous quarter. Wireless subscriptions increased year-on-year (Y-O-Y) at the rate of 0.38% during the quarter.

6. Wireless Tele-density increased from 88.50 at the end of Jun-19 to 88.90 at the end of Sep-19 with quarterly growth rate of 0.45%.

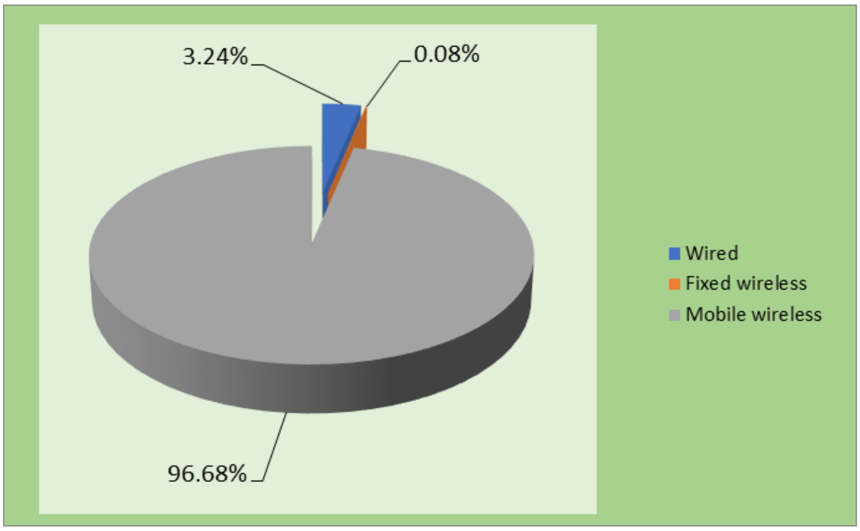
7. Wireline subscriber increassed from 21.17 million at the end of Jun-19 to 21.49 million at the end of Sep-19 with quarterly growth rate of

1.52%. However, year-on-year (Y-O-Y) basis, wireline subscription declined by 2.81% in QE Sep-19.

8. Wireline Teledensity increased from 1.61 at the end of Jun-19 to 1.63 at the end of Sep-19.

9. Total number of Internet[2] subscribers increased from 665.31 million at the end of Jun-19 to 687.62 million at the end of Sep-19, registering a quarterly growth rate of 3.35%. Out of 687.62 million internet subscribers, number of Wired Internet subscribers are 22.26 million and number of Wireless Internet subscribers are 665.37 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband[3] Internet subscriber base of 625.42 million and Narrowband[4] Internet subscriber base of 62.20 million.

[2] Internet: Interconnected global networks that use the internet protocol.
[3] Broadband: Internet access with a minimum capacity of greater or equal 512 Kbit/s in one or both directions.
[4] 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 5.19% from 594.58 million at the end of Jun-19 to 625.42 million at the end of Sep-19. However, the narrowband Internet subscriber base declined by 12.05% from 70.72 million at the end of Jun-19 to 62.20 million at the end of Sep-19.

12. Monthly Average Revenue per User (ARPU)[5] for wireless service increased by 0.11%, from ₹74.30 in QE Jun-19 to ₹74.38 in QE Sep-19. On yearly (Y-O-Y) basis, monthly ARPU for wireless service increased by 10.37% in this quarter.

13. Prepaid ARPU per month increased from ₹66 in QE Jun-19 to ₹67 in QE Sep-19, however Postpaid ARPU per month declined from ₹253 in QE Jun-19 to ₹247 in QE Sep-19.

14. On an all India average, the overall Minutes of Usage (MOU)[6] per subscriber per month for wireless service declined by 1.49% from 701 for QE Jun-19 to 691 in QE Sep-19.

15. Prepaid MOU per subscriber per month declined from 705 in QE Jun-19 to 694 in QE Sep-19. Postpaid MOU per subscriber per month also declined from 626 in QE Jun-19 to 617 in QE Sep-19.

16. Gross Revenue[7] (GR) and Adjusted Gross Revenue[8] (AGR) of Telecom Service Sector for the Q.E. Sep19 has been ₹59,992 Crore and ₹37,338

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[5] ARPU per month is calculated by dividing net subscribers' revenue by average number of subscribers.

[6] MOU per subscriber per month is calculated by dividing total minutes of usage (incoming & outgoing) by average number of subscribers.

[7] 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.

[8] Adusted 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

Crore respectively. GR and AGR declined by 2.51% and 4.56% respectively in Q.E. Sep-19 as compared to previous quarter.

17. The year-on-year (Y-O-Y) growth in GR and AGR in Q.E. Sep-19 over the same quarter in last year has been 3.74% and 3.31% respectively.

18. Pass-through[9] charges increased from ₹22,411 Crore in QE Jun-19 to ₹22,654 Crore in QE Sep-19 with quarterly growth rate of 1.08%. The year-on-year (Y-O-Y) growth rate of 4.47% has been recorded in pass-through charges for QE Sep-19.

19. The License Fee[10] declined from ₹3,133 Crore for the QE Jun-19 to ₹2,989 Crore for the QE Sep-19. The quarterly and the year-on-year (Y-O-Y) growth rates of license fee are -4.59% and 3.44% respectively in this quarter.

20. Access services contributed 74.78% 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)[11] declined by 0.86%, 2.55%, 2.56% and 0.59% respectively in QE Sep-19. However, Pass Through Charges increased quarterly by 2.33% during the same period.

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

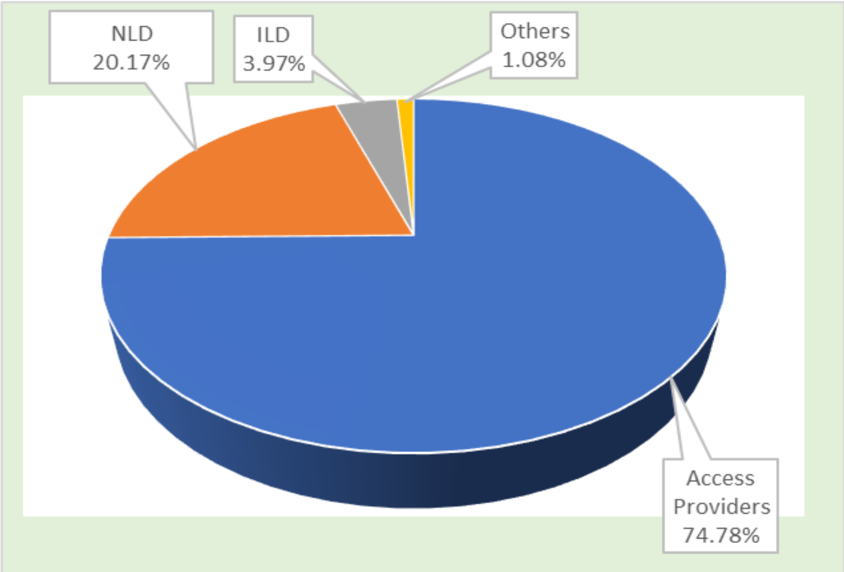
[9] Pass through charges means the charges excluded from gross revenue to arrive at adjusted gross revenue for the purpose of levying licence fee.

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

[11] 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)

Composition of Adjusted Gross Revenue in access services



21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, declined from ₹80.66 in QE Jun-19 to ₹78.17 in QE Sep-19.

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 deterioration in QoS
• % Fault repaired within 5 days (for urban areas) • Fault incidences – number of faults per 100 subs/month • Mean time to Repair (MTTR) • Response time to the customer for Assistance - Accessibility of call centre/customer care • Response time to the customer for Assistance - %age of calls answered by the operators (voice to voice) within 90 sec • Termination/closure of service - %age requests for Termination/Closure of service complied within 7 days

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) • Accessibility of call centre/customer care • %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) • Worst affected BSs due to down-time • SDCCH/Paging Channel Congestion/RRC Congestion • Network QoS DCR Spatial Distribution Measure [Network_ QSD (90,90)] • Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] • Metering and billing - postpaid • 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 sec

24. A total number of 910 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/uplinking and downlinking both, as on 31st October, 2019.

25. As per the reporting to TRAI, done by broadcaster in pursuance of the Tariff Order (Broadcasting & Cable), dated 3rd March 2017, there are 330 pay channels as on 30th September, 2019, which include 232 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 30th September, 2019, there were 4 pay DTH service providers in the country.

27. Pay DTH has attained total active subscriber base of around 69.30 million in QE 30th September, 2019. 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 30th September, 2019, there are 367 operational private FM Radio stations in 104 cities with operational 33 Private FM Radio broadcaster as compared to 366 private FM Radio Stations in 104 cities with operational 33 FM Radio broadcasters in the previous quarter.

29. The reported advertisement revenue during the quarter ending 30th September, 2019 in respect of 366 private FM Radio stations is Rs.466.70 crore as against Rs.526.13 crore in respect of 365 private FM Radio stations for the previous quarter.

30. As per data received from MIB, as on 30th September, 2019, 275 Community Radio Stations are operational in the country.

Snapshot

(Data as on Q.E. 30th September, 2019)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,195.24 Million
% change over the previous quarter	0.73%
Urban Subscribers	677.95 Million
Rural Subscribers	517.29 Million
Market share of Private Operators	88.81%
Market share of PSU Operators	11.19%
Teledensity	90.52
Urban Teledensity	160.63
Rural Teledensity	57.59
Wireless Subscribers	
Total Wireless Subscribers	1,173.75 Million
% change over the previous quarter	0.71%
Urban Subscribers	659.18 Million
Rural Subscribers	514.56Million
Market share of Private Operators	89.74%
Market share of PSU Operators	10.26%
Teledensity	88.90
Urban Teledensity	156.18
Rural Teledensity	57.28
Total Wireless Data Usage during the quarter	20,315 million TB
Number of Public Mobile Radio Trunk Services (PMRTS)	59,118
Number of Very Small Aperture Terminals (VSAT)	2,97,047
Wireline Subscribers	
Total Wireline Subscribers	21.49 Million
% change over the previous quarter	1.52%
Urban Subscribers	18.77 Million
Rural Subscribers	2.72 Million
Market share of Private Operators	38.07%
Market share of PSU Operators	61.93%
Teledensity	1.63
Urban Teledensity	4.45
Rural Teledensity	0.30
No. of Village Public Telephones (VPT)	70,834
No. of Public Call Office (PCO)	2,07,243

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹ 59,992 Crore
% change in GR over the previous quarter	-2.51%
Adjusted Gross Revenue (AGR) during the quarter	₹ 37,338 Crore
% change in AGR over the previous quarter	-4.56%
Share of Public sector undertakings in Access AGR	7.88%
Monthly Average Revenue Per User (ARPU) for Access Services	₹ 78.17
Internet/Broadband Subscribers	
Total Internet Subscribers	687.62 Million
% change over previous quarter	3.35%
Narrowband subscribers	62.20 Million
Broadband subscribers	625.42 Million
Wired Internet Subscribers	22.26 Million
Wireless Internet Subscribers	665.37 Million
Urban Internet Subscribers	439.99 Million
Rural Internet Subscribers	247.63 Million
Total Internet Subscribers per 100 population	52.08
Urban Internet Subscribers per 100 population	104.25
Rural Internet Subscribers per 100 population	27.57
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking /uplinking	910
Number of Pay TV Channels as reported by broadcasters	330
Number of private FM Radio Stations (excluding All India Radio)	367
Number of total active subscribers with pay DTH operators	69.30 Million
Number of Operational Community Radio Stations	275
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service (GSM including LTE)	₹ 74.38
Minutes of Usage (MOU) per subscriber per month - Wireless Service (GSM including LTE)	691 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	197.09 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	10.37 GB
Average cost to subscriber per GB wireless data during the quarter	₹ 6.98