

Information Note to the Press (Press Release No.103/2018)

TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 3rd October, 2018

For Immediate release

Website:- www.trai.gov.in

“Indian Telecom Services Performance Indicator Report” for the Quarter ending April-June, 2018

TRAI today has released the **“Indian Telecom Services Performance Indicator Report”** for the Quarter ending 30th June, 2018. 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, 2018 to 30th June, 2018 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)

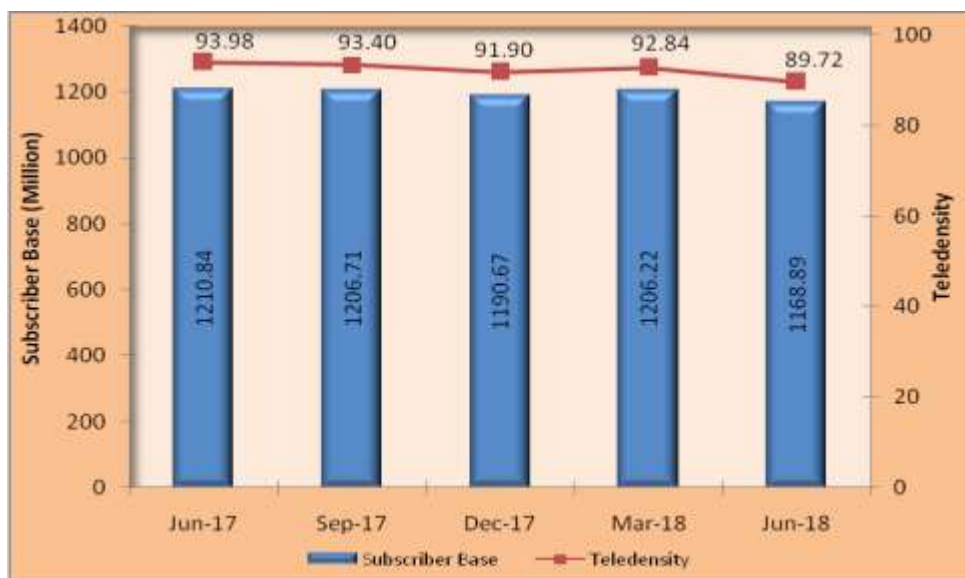
The Indian Telecom Services Performance Indicators

April – June, 2018

Executive Summary

1. The number of telephone subscribers in India declined from 1,206.22 million at the end of Mar-18 to 1,168.89 million at the end of Jun-18, registering a decline rate of 3.09% over the previous quarter. This reflects year-on-year (Y-O-Y) decline rate of 3.46% over the same quarter of last year. The overall Teledensity in India declined from 92.84 as on QE Mar-18 to 89.72 as on QE Jun-18.

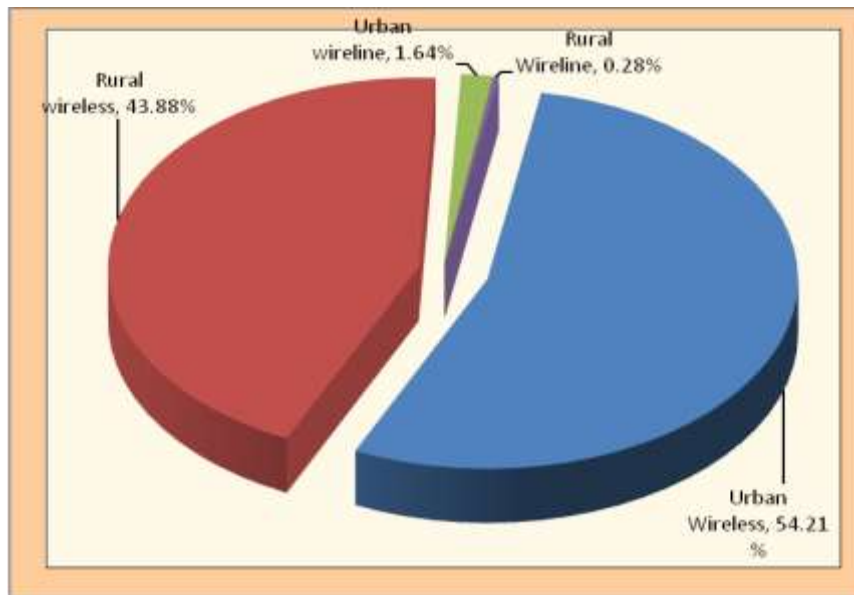
Trends in Telephone subscribers and Teledensity in India



2. Subscription in Urban Areas declined from 681.61 million at the end of Mar-18 to 652.76 million at the end of Jun-18 and Urban Teledensity also declined from 165.90 to 158.16 during the same period.
3. Rural subscription declined from 524.61 million at the end of Mar-18 to 516.13 million at the end of Jun-18 and Rural Teledensity also declined from 59.05 at the end of Mar-18 to 57.99 at the end of Jun-18.

4. Out of the total subscription, the share of Rural subscription increased from 43.49% at the end of Mar-18 to 44.16% at the end of Jun-18.

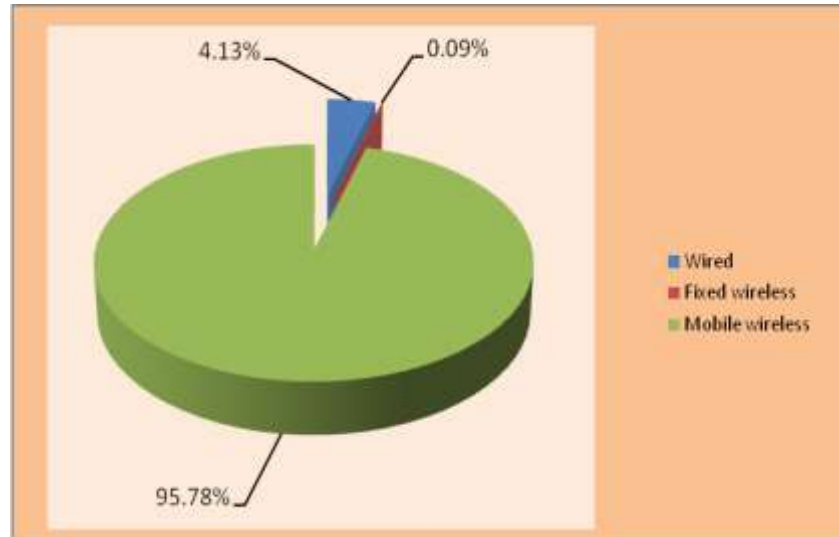
Composition of Telephone Subscribers



5. With a net decline of 36.92 million subscribers during the quarter, total wireless (GSM incl. LTE + CDMA) subscriber base declined from 1,183.41 million at the end of Mar-18 to 1,146.49 million at the end of Jun-18, registering a decline rate of 3.12% over the previous quarter. The year-on-year (Y-O-Y) decline rate of wireless subscribers for Jun-18 is 3.40%.
6. Wireless Tele-density declined from 91.09 at the end of Mar-18 to 88.00 at the end of Jun-18.
7. Wireline subscriber declined from 22.81 million at the end of Mar-18 to 22.40 million at the end of Jun-18 with quarterly decline rate of 1.82%. The year-on-year (Y-O-Y) decline rate in wireline subscribers for Jun-18 is 6.68%.
8. Wireline Teledensity declined from 1.76 at the end of Mar-18 to 1.72 at the end of Jun-18.

9. Total number of Internet subscribers increased from 493.96 million at the end of Mar-18 to 512.26 million at the end of Jun-18, registering a quarterly growth rate of 3.71%. Out of 512.26 million internet subscribers, Wired Internet subscribers are 21.16 million and Wireless Internet subscribers are 491.10 million.

Composition of internet subscription

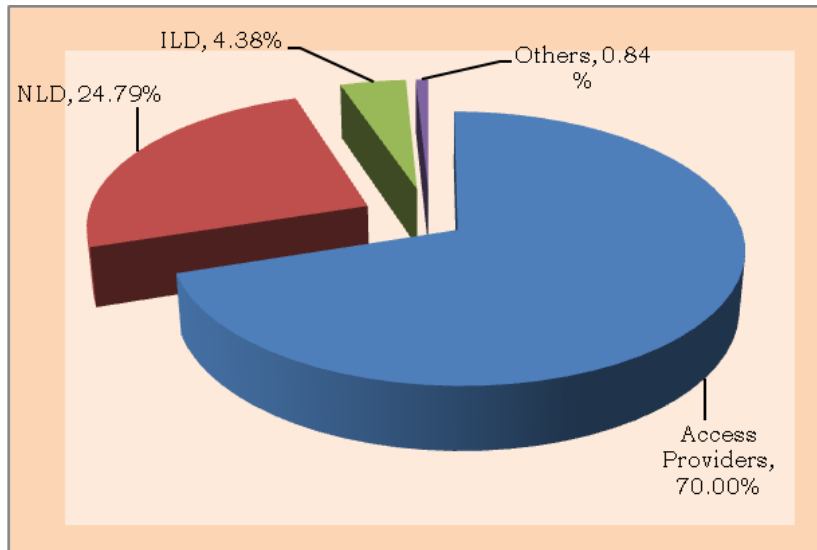


10. The Internet subscriber base is comprised of Broadband Internet subscriber base of 447.12 million and Narrowband Internet subscriber base of 65.14 million.
11. The broadband Internet subscriber base increased by 8.37% from 412.60 million at the end of Mar-18 to 447.12 million at the end of Jun-18. On the other hand, the narrowband Internet subscriber base declined by 19.93% from 81.35 million at the end of Mar-18 to 65.14 million at the end of Jun-18.
12. Monthly Average Revenue per User (ARPU) for GSM service (including LTE) declined by 8.92%, from ₹76 in QE Mar-18 to ₹69 in QE Jun-18. Monthly ARPU for GSM service (including LTE) declined by 12.97% on Y-O-Y in this quarter.

13. Prepaid ARPU for GSM service per month declined from ₹62 in QE Mar-18 to ₹59 in QE Jun-18, however Postpaid ARPU per month declined from ₹360 in QE Mar-18 to ₹307 in QE Jun-18.
14. On an all India average, the overall MOU per subscriber per month for GSM service increased by 4.10% from 584 for QE Mar-18 to 608 in QE Jun-18.
15. Prepaid MOU per subscriber for GSM service increased from 575 in QE Mar-18 to 601 in QE Jun-18, however postpaid MOU declined from 776 in QE Mar-18 to 765 in QE Jun-18.
16. Monthly ARPU for CDMA full mobility service sharply declined by 65.08%, from ₹79 in QE Mar-18 to ₹28 in QE Jul-18 and Y-O-Y basis Monthly ARPU for CDMA full mobility service declined by 76.52% in this quarter.
17. The total MOU per subscriber per month for CDMA full mobility service declined by 68.56%, from 61 in QE Mar-18 to 19 in QE Jun-18. The outgoing MOUs declined from 39 in QE Mar-18 to 2 in QE Jun-18, and incoming MOUs also declined from 22 in QE Mar-18 to 17 in QE Jun-18.
18. Gross Revenue (GR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the QE Jun-18 has been ₹58,401 Crore and ₹36,552 Crore respectively. GR declined by 6.10%, however AGR increased by 2.40% in QE Jun-18 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 -10.00% and -8.11% respectively.

20. Pass-through charges declined from ₹26,501 Crore in QE Mar-18 to ₹21,849 Crore in QE Jun-18. The quarterly and the year-on-year (Y-O-Y) growth rates of pass-through charges for QE Jun-18 are -17.56% and -12.99% respectively.
21. The License Fee declined from ₹2,932 Crore for the QE Mar-18 to ₹2,929 Crore for the QE Jun-18. The quarterly and the year-on-year (Y-O-Y) growth rates of license fee are -0.11% and -10.17% respectively in this quarter.
22. Access services contributed 70.00% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), License Fee, Spectrum Usage Charges(SUC) and Pass Through Charges declined by 9.07%, 2.88%, 2.21% and 21.86% respectively in QE Jun-18. However, Adjusted Gross Revenue (AGR) increased by 0.54% during the quarter.

Composition of Adjusted Gross Revenue in access services



23. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, increased from ₹71.62 in QE Mar-18 to ₹73.34 in QE Jun-18.

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
<ul style="list-style-type: none"> • Network QoS DCR Spatial Distribution Measure [Network_QSD(90,90)] (%age) • Network QoS DCR Temporal Distribution Measure [Network_QTD(97,90)] (%age) • Point of Interconnection (POI) Congestion (No. of POIs not meeting the benchmark) • Metering and billing credibility- post paid • %age of calls answered by the operators (voice to voice) within 90 sec 	<ul style="list-style-type: none"> • Call Set-up Success Rate and Session Establishment Success Rate for Circuit Switched Voice or VoLTE as applicable (within licensee's own network) • SDCCH/Paging Channel Congestion/RRC Congestion (%age) • TCH, RAB and E-RAB Congestion (%age) • Resolution of billing/charging/validity complaints (100% within 6 weeks) • 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

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	Parameters showing deterioration in QoS
<ul style="list-style-type: none"> • Response time to the customer for Assistance – Accessibility of call centre/ customer care 	<ul style="list-style-type: none"> • % Fault repaired by next working day (for urban areas) • Mean time to Repair (MTTR) • Resolution of billing/charging/credit & validity complaints • % of request for Termination/Closure of service complied within 7 days

26. A total number of 867 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 30th June, 2018.
27. During the quarter ending 30th June, 2018, there were 309 pay channels as reported by 49 broadcasters as compared to 308 pay channels reported in the previous quarter. 309 pay channels include 212 SD pay TV channels and 97 HD Pay TV channels. During the quarter ending 30th June, 2018, as per the report submitted by the broadcasters, two new pay channels were commenced and one pay channel namely “Toonami” was reported to be discontinued.
28. Since its introduction in the year 2003, DTH service has displayed a phenomenal growth. During the QE 30th June, 2018, there were 5 pay DTH service providers in the country.
29. DTH has attained net pay active subscriber base of around 69.37 million in QE 30th June, 2018. This is in addition the subscribers of free DTH services of Doordarshan.
30. Apart from the radio stations operated by All India Radio, the public broadcaster, as on 30th June, 2018, there are 328 operational private FM Radio stations and 86 existing cities operated by 34 FM Radio broadcasters as compared to 324 private FM Radio Stations 86 cities operated by 34 FM Radio broadcasters in the previous quarter.
31. As per data received from MIB, as on 30th June, 2018, 237 Community Radio Stations are operational.

Snapshot

(Data As on Q.E. 30 th June, 2018)	
Telecom Subscribers (Wireless +Wireline)	
Total Subscribers	1,168.89 Million
% change over the previous quarter	-3.09%
Urban Subscribers	652.76 Million
Rural Subscribers	516.13 Million
Market share of Private Operators	88.72%
Market share of PSU Operators	11.28%
Teledensity	89.72
Urban Teledensity	158.16
Rural Teledensity	57.99
Wireless Subscribers	
Total Wireless Subscribers	1,146.49 Million
% change over the previous quarter	-3.12%
Urban Subscribers	633.60 Million
Rural Subscribers	512.89 Million
GSM Subscribers	1,143.48 Million
CDMA Subscribers	3.02 Million
Market share of Private Operators	89.83%
Market share of PSU Operators	10.17%
Teledensity	88.00
Urban Teledensity	153.52
Rural Teledensity	57.63
Total Wireless Data Usage during the quarter	10,418,076 TB
Wireline Subscribers	
Total Wireline Subscribers	22.40 Million
% change over the previous quarter	-1.82%
Urban Subscribers	19.16 Million
Rural Subscribers	3.24 Million
Market share of Private Operators	32.12%
Market share of PSU Operators	67.88%
Teledensity	1.72
Urban Teledensity	4.64
Rural Teledensity	0.36
No. of Village Public Telephones (VPT)	1,86,951
No. of Public Call Office (PCO)	3,30,504

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹ 58,401 Crore
% change in GR over the previous quarter	-6.10%
Adjusted Gross Revenue (AGR) during the quarter	₹ 36,552 Crore
% change in AGR over the previous quarter	2.40%
Share of Public sector undertakings in Access AGR	10.61%
Monthly Average Revenue Per User (ARPU) for Access Services	₹ 73.34
Internet/Broadband Subscribers	
Total Internet Subscribers	512.26 Million
% change over previous quarter	3.71%
Narrowband subscribers	65.14 Million
Broadband subscribers	447.12 Million
Wired Internet Subscribers	21.16 Million
Wireless Internet Subscribers	491.10 Million
Urban Internet Subscribers	338.84 Million
Rural Internet Subscribers	173.42 Million
Total Internet Subscribers per 100 population	39.32
Urban Internet Subscribers per 100 population	82.10
Rural Internet Subscribers per 100 population	19.48
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking /uplinking	867
Number of Pay TV Channels as reported by broadcasters	309
Number of private FM Radio Stations (excluding All India Radio)	328
Number of Pay Subscribers net Active with Private DTH Operators	69.37 Million
Number of Operational Community Radio Stations	237
Number of pay DTH Operators	5
Revenue & Usage Parameters	
Monthly ARPU GSM Full Mobility Service including LTE	₹ 69
Monthly ARPU CDMA Full Mobility Service	₹ 28
Minutes of Usage (MOU) per subscriber per month - GSM Full Mobility Service including LTE	608 Minutes
Minutes of Usage (MOU) per subscriber per month - CDMA Full Mobility Service	19 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	188.78 Million
Wireless Data Usage	
Average Data Usage per subscriber per month – GSM including LTE (2G+3G+4G)	3,216 MB
Average Data Usage per subscriber per month - CDMA	53 MB
Average Data Usage per subscriber per month – Total(GSM+CDMA)	3,206 MB
Average outgo per GB data for GSM including LTE (2G+3G+4G)	₹ 12.06
Average outgo per GB data for CDMA	₹ 88