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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 9th February, 2024

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

"Indian Telecom Services Performance Indicator Report" for the Quarter July-September, 2024

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 30th September, 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 July, 2023 to 30th September, 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

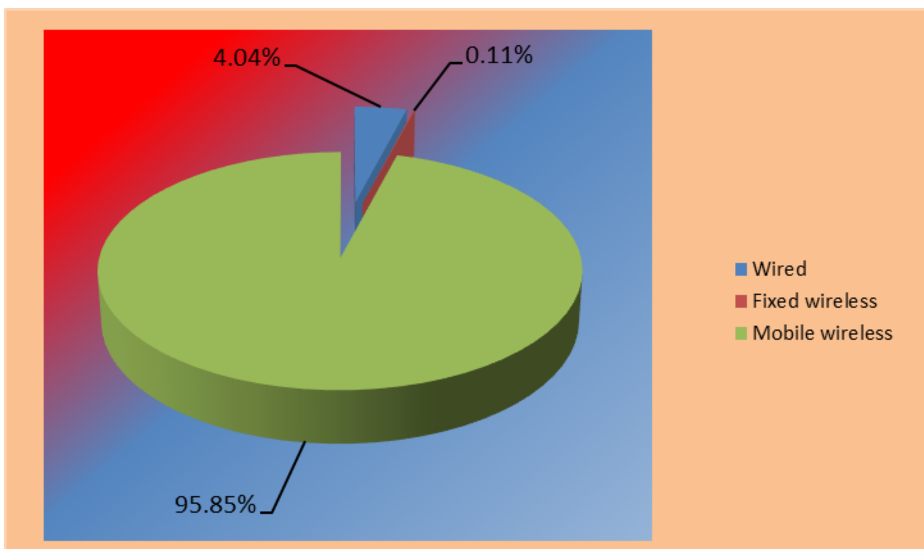
(V. Raghunandan)
Secretary, TRAI

The Indian Telecom Services Performance Indicators
July–September, 2023

Executive Summary

1. Total number of Internet subscribers increased from 895.83 million at the end of Jun-23 to 918.19 million at the end of Sep-23, registering a quarterly rate of growth 2.50%. Out of 918.19 million internet subscribers, number of Wired Internet subscribers are 37.11 million and number of Wireless Internet subscribers are 881.08 million.

Composition of internet subscription



2. The Internet subscriber base is comprised of Broadband Internet subscriber base of 885 million and Narrowband Internet subscriber base of 33.19 million.

3. The broadband Internet subscriber base increased by 2.73% from 861.47 million at the end of Jun-23 to 885 million at the end of Sep-23. The narrowband Internet subscriber base decreased from 34.36 million at the end of Jun-23 to 33.19 million at the end of Sep-23.

4. Wireline subscribers increased from 30.31 million at the end of June-23 to 30.98 million at the end of Sep-23 with a quarterly rate of growth 2.19% and, on Y-O-Y basis, wireline subscriptions also increased by 17.03% at the end of QE Sep-23.

5. Wireline Tele-density increased from 2.18% at the end of Jun-23 to 2.22% at the end of Sep-23 with quarterly rate of growth 1.96%.

6. Monthly Average Revenue per User (ARPU) for wireless service increased by 2.76%, from Rs.145.64 in QE Jun-23 to Rs.149.66 in QE Sep-23. On Y-O-Y basis, monthly ARPU for wireless service increased by 8.99% in this quarter.

7. Prepaid ARPU per month increased from Rs.143.81 in QE Jun-23 to Rs.148 in QE Sep-23 and Postpaid ARPU per month also increased from Rs.166.22 in QE Jun-23 to Rs.167.93 in QE Sep-23.

8. On an all-India average, the overall MOU per subscriber per month decreased by 1.21% from 960 in Q.E. Jun-2023 to 948 in Q.E. Sep-2023.

9. Prepaid MOU per subscriber per month decreased from 1000 in QE Jun-23 to 989 in QE Sep-23. Postpaid MOU per subscriber per month also decreased from 509 in QE Jun-23 to 495 in QE Sep-23.

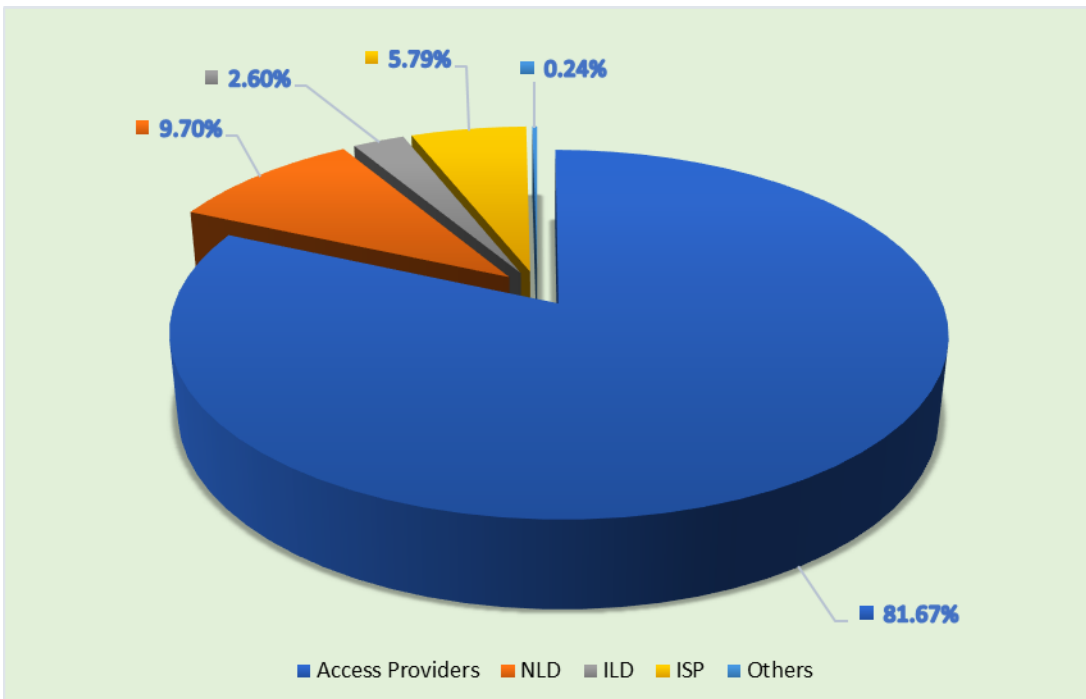
10. Gross Revenue (GR), Applicable Gross Revenue (ApGR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the Q.E. Sep-23 has been Rs.82,741 Crore, Rs.79,747 crore and Rs.66,583 Crore respectively. GR increased by 2.28%, ApGR increased by 1.78% and AGR increased by 1.46% in Q.E. Sep-23, as compared to previous quarter.

11. The Y-O-Y rate of growth in GR, ApGR and AGR in Q.E. Sep-23 over the same quarter in last year has been -1.22%, 6.74% and 7.43% respectively.

12. Pass-through charges increased from Rs.13,220 Crore in QE Jun-23 to Rs.13,425 Crore in QE Sep-23 with quarterly rate of growth by 1.55%. The Y-O-Y rate of decline 0.15% has been recorded in pass-through charges for QE Sep-23.

13. The License Fee increased from Rs.5,246 Crore for the QE Jun-23 to Rs.5,326 Crore for the QE Sep-23. The quarterly and the Y-O-Y rates of growth in license fees are 1.53% and 8.23% respectively in this quarter.

Service-wise composition of Adjusted Gross Revenue

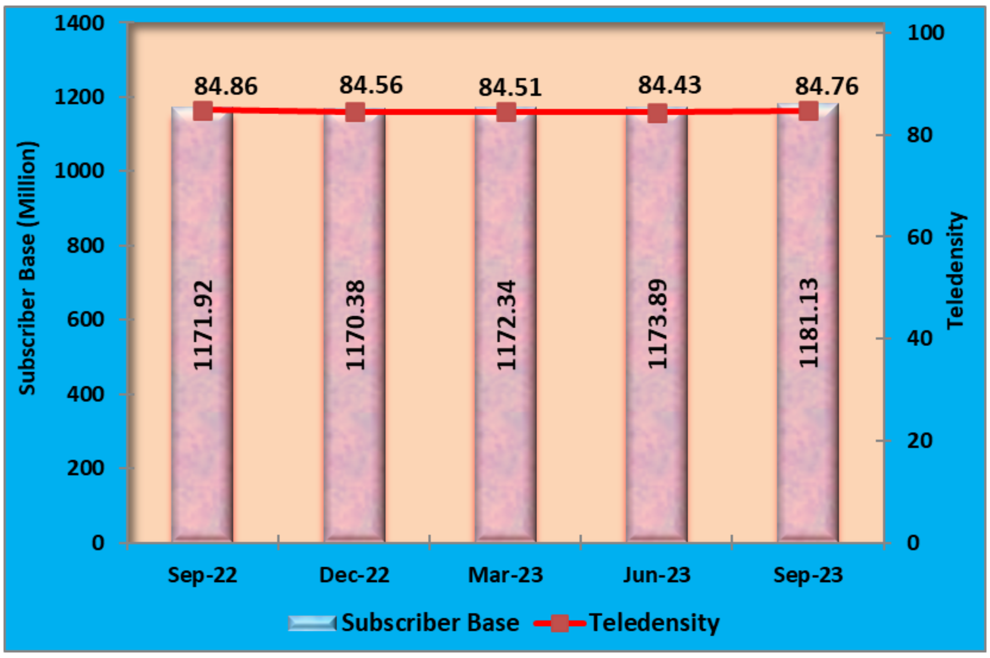


14. Access services contributed 81.67% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Applicable Gross Revenue (ApGR), Adjusted Gross Revenue (AGR), License Fee, Spectrum Usage Charges (SUC) and Pass Through Charges increased by 3.68%, 2.52%, 2.91%, 3.06%, 2.20% and 0.66% respectively in QE Sep-23.

15. The number of telephone subscribers in India increased from 1,173.89 million at the end of Jun-23 to 1,181.13 million at the end of Sep-23, registering a rate of growth of 0.62% over the previous quarter. This

reflects Year-On-Year (Y-O-Y) rate of growth of 0.79% over the same quarter of the last year. The overall Tele-density in India increased from 84.43% as in QE Jun-23 to 84.76% as in QE Sep-23.

Trends in Telephone subscribers and Tele-density in India

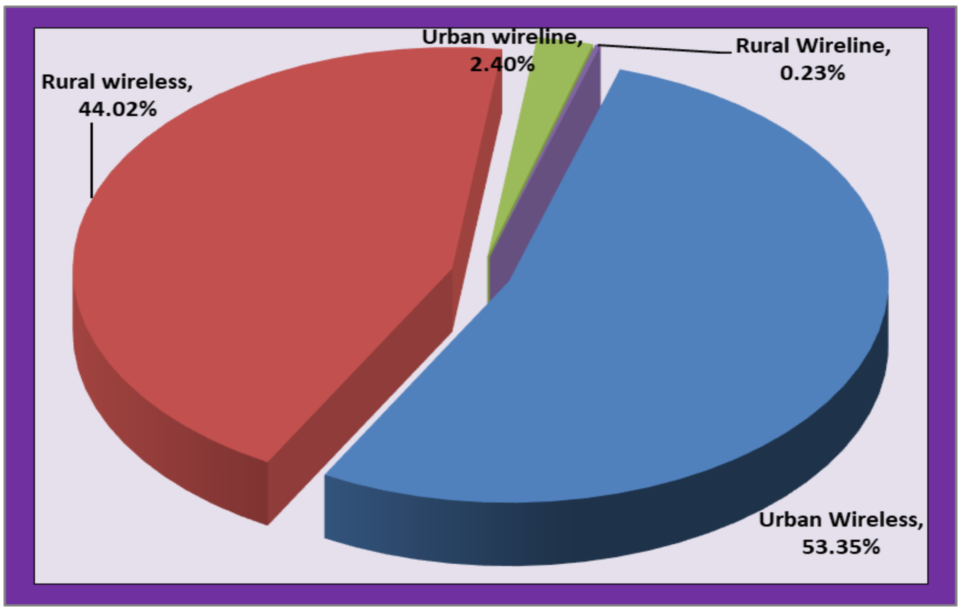


16. Telephone subscribers in Urban areas increased from 653.70 million at the end of Jun-23 to 658.46 million at the end of Sep-23 and Urban Tele-density also increased from 133.19% to 133.54% during the same period.

17. Rural telephone subscribers increased from 520.19 million at the end of Jun-23 to 522.66 million at the end of Sep-23 and Rural Tele-density also increased from 57.83% to 58.05% during the same period.

18. Out of the total subscription, the share of Rural subscription decreased from 44.31% at the end of Jun-23 to 44.25% at the end of Sep-23.

Composition of Telephone Subscribers



19. With a net increase of 6.57 million subscribers during the quarter, the total wireless subscriber base increased from 1,143.58 million at the end of Jun-23 to 1,150.15 million at the end of Sep-23, registering a rate of growth 0.57% over the previous quarter. On Y-O-Y basis, wireless subscriptions increased at the rate of 0.41% during the year.

20. Wireless Tele-density increased from 82.25% at the end of Jun-23 to 82.54% at the end of Sep-23 with quarterly rate of growth 0.35%.

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: -

i. Accessibility of call centre/ customer care ≥ 95%

ii. % age of calls answered by the operators (voice to voice) within ninety seconds ≥ 95%

iii. Time taken for refund of deposits after closures 100% within 60 days

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

i. % Fault repaired by next working day (for urban areas) ≥ 85%

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. Worst affected BS due to down-time(%age) ≤ 2%

iii. Call Set-up Success Rate and Session Establishment Success Rate for Circuit Switched Voice or VoLTE as applicable (within licensee's own network) ≥ 95%

iv. SDCCH/ Paging Channel Congestion/ RRC Congestion (% age) ≤ 1%

v. TCH, RAB and E-RAB congestion (%age) ≤ 2%

vi. Network QoS DCR Spatial Distribution Measure [Network_ QSD (90,90)] ≤ 2%

vii. Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] ≤ 3%

viii. Connections with good voice quality, Circuit Switched Voice Quality and VoLTE quality ≥ 95%

ix. Down Link (DL) Packet Drop Rate or DL-PDR ≤ 2%

x. Up Link (UL) Packet Drop Rate or UL-PDR ≤ 2%

xi. Point of Interconnection (POI) Congestion (No. of POIs not meeting the benchmark) ≤ 0.5%

xii. Metering and billing credibility - postpaid ≤ 0.1%

xiii. Metering and billing credibility – prepaid ≤ 0.1%

xiv. Resolution of billing/charging/validity complaints - 98% within 4 weeks

xv. Resolution of billing/charging/validity complaints - 100% within 6 weeks

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

xvii. Accessibility of call centre/ customer care > 95%

xviii. Termination / Closure of service < 7 days

xix. 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: -

i. Worst affected BSs due to down-time (%age) < 2%

ii. Accessibility of call centre/ customer care ≥ 95%

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

26. A total of approximately 915 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/both uplinking & downlinking.

27. As per the reporting done by broadcasters in pursuance of the Tariff Order dated 3rd March 2017, as amended, out of 904 permitted satellite TV channels which are available for downlinking in India, there are 361 satellite pay TV channels as on 30th September, 2023. Out of 361 pay channels, 257 are SD satellite pay TV channels and 104 are HD satellite pay TV channels.

28. 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 September 2023, there were 4 pay DTH service providers in the country.

29. Pay DTH has attained total active subscriber base of around 64.18 million. This is in addition to the subscribers of the DD Free Dish (free DTH services of Doordarshan). The total active subscriber base has decreased from 65.50 million in QE June 2023 to 64.18 million in QE September 2023.

30. 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 September 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.

31. The advertisement revenue reported by FM Radio operators during the quarter ending 30th September 2023 in respect of 388 private FM Radio channels is Rs.408.37 crore as against Rs.389.97 crore in respect of 388 private FM Radio channels for the previous quarter.

32. As on 30th September, 2023, 465 Community Radio stations are operational.

SNAPSHOT

(Data as on Q.E. 30th September, 2023)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,181.13 Million
% change over the previous quarter	0.62%
Urban Subscribers	658.46 Million
Rural Subscribers	522.66 Million
Market share of Private Operators	91.13%
Market share of PSU Operators	8.87%
Tele-density	84.76%
Urban Tele-density	133.54%
Rural Tele-density	58.05%
Wireless Subscribers	
Total Wireless Subscribers	1,150.15 Million
% change over the previous quarter	0.57%
Urban Subscribers	630.17 Million
Rural Subscribers	519.99 Million
Market share of Private Operators	91.69%
Market share of PSU Operators	8.31%
Tele-density	82.54%
Urban Tele-density	127.81%
Rural Tele-density	57.75%
Total Wireless Data Usage during the quarter	47,629 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	65,811
Number of Very Small Aperture Terminals (VSAT)	2,53,445
Wireline Subscribers	
Total Wireline Subscribers	30.98 Million
% change over the previous quarter	2.19%
Urban Subscribers	28.30 Million
Rural Subscribers	2.68 Million
Market share of PSU Operators	29.52%
Market share of Private Operators	70.48%
Tele-density	2.22%
Rural Tele-density	0.30%
Urban Tele-density	5.74%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	30,643

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs. 82,741 Crore
% change in GR over the previous quarter	2.28%
Applicable Gross Revenue (ApGR) during quarter	Rs. 79,747 Crore
% change in ApGR over the previous quarter	1.78%
Adjusted Gross Revenue (AGR) during the quarter	Rs. 66,583 Crore
% change in AGR over the previous quarter	1.46%
Share of Public sector undertakings in Access AGR	3.93%
Internet/Broadband Subscribers	
Total Internet Subscribers	918.19 Million
% change over previous quarter	2.50%
Narrowband subscribers	33.19 Million
Broadband subscribers	885 Million
Wired Internet Subscribers	37.11 Million
Wireless Internet Subscribers	881.08 Million
Urban Internet Subscribers	542.53 Million
Rural Internet Subscribers	375.66 Million
Total Internet Subscribers per 100 population	65.89
Urban Internet Subscribers per 100 population	110.03
Rural Internet Subscribers per 100 population	41.72
No. of Public Wi-Fi Hotspots	1,65,533
Aggregate Data Consumed (GB)	73,23,038
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	915
Number of Pay TV Channels as reported by broadcasters	361
Number of private FM Radio Stations (excluding All India Radio)	388
Number of total active subscribers with pay DTH operators	64.18 Million
Number of Operational Community Radio Stations	465
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.149.66
Minutes of Usage (MOU) per subscriber per month - Wireless Service	948 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	74.14 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	19.08 GB
Average revenue realization per GB for wireless data usage during the quarter	Rs.9.22