

Information Note to the Press (Press Release No. 48/2019)

TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 10th July, 2019

For Immediate release

Website:- www.trai.gov.in

**“Indian Telecom Services Performance Indicator Report” for
the Quarter ending January-March, 2019**

TRAI today has released the **“Indian Telecom Services Performance Indicator Report”** for the Quarter ending 31st March, 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 January, 2019 to 31st March, 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)
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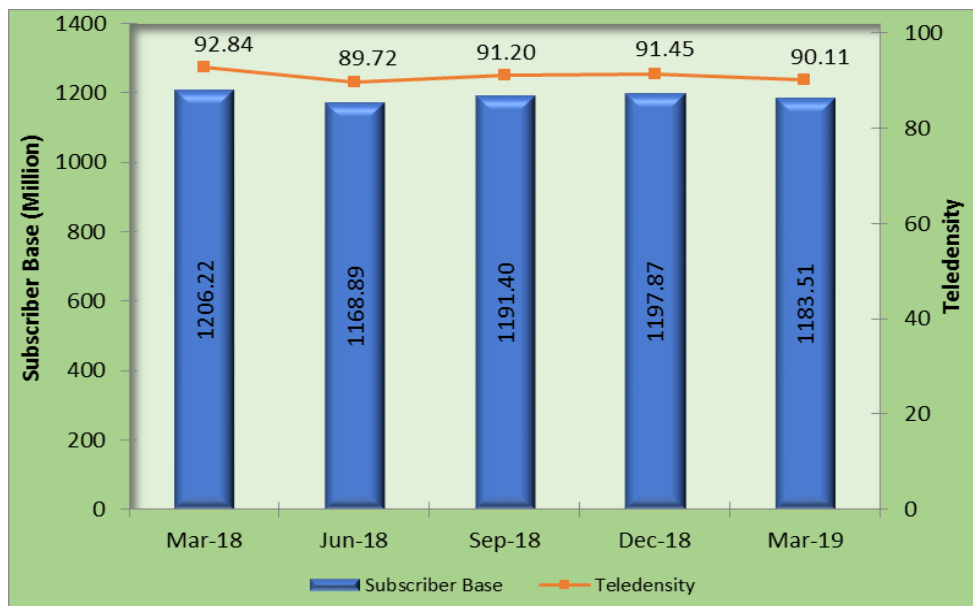
The Indian Telecom Services Performance Indicators

January – March, 2019

Executive Summary

1. The number of telephone subscribers in India declined from 1,197.87 million at the end of Dec-18 to 1,183.51 million at the end of Mar-19, registering a decline rate of 1.20% over the previous quarter. This reflects year-on-year (Y-O-Y) decline rate of 1.88% over the same quarter of last year. The overall Tele-density in India declined from 91.45 as on QE Dec-18 to 90.11 as on QE Mar-19.

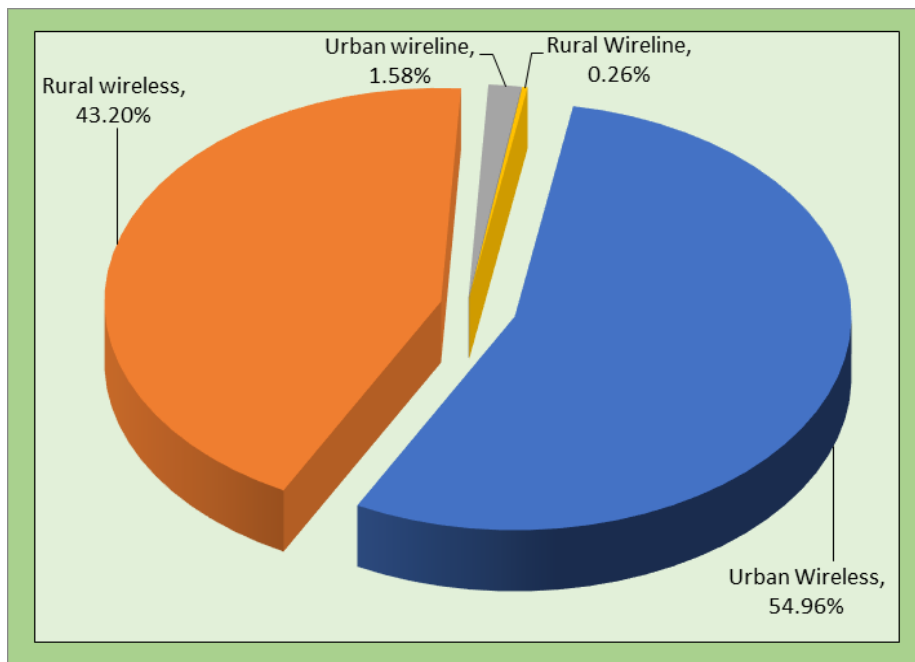
Trends in Telephone subscribers and Tele-density in India



2. Telephone subscription in Urban areas increased from 666.28 million at the end of Dec-18 to 669.16 million at the end of Mar-19, however Urban Tele-density slightly declined from 159.98 to 159.96 during the same period.

3. Rural telephone subscription declined from 531.59 million at the end of Dec-18 to 514.35 million at the end of Mar-19 and Rural Tele-density also declined from 59.50 at the end of Dec-18 to 57.47 at the end of Mar-19.
4. Out of the total subscription, the share of Rural subscription declined from 44.38% at the end of Dec-18 to 43.46% at the end of Mar-19.

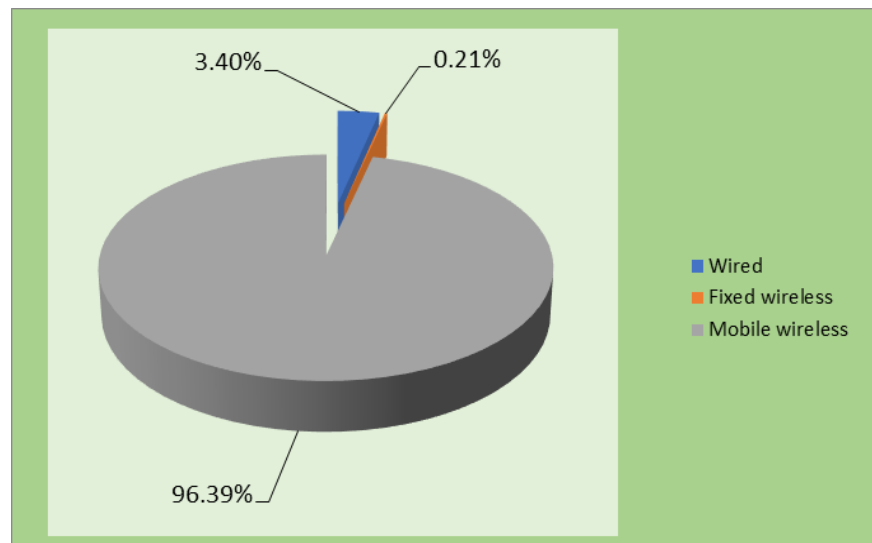
Composition of Telephone Subscribers



5. With a net decline of 14.19 million subscribers during the quarter, total wireless (GSM incl. LTE + CDMA) subscriber base declined from 1,176.00 million at the end of Dec-18 to 1,161.81 million at the end of Mar-19, registering a decline rate of 1.21% over the previous quarter. Wireless subscriptions declined year-on-year (Y-O-Y) at the rate of 1.82% during the quarter.
6. Wireless Tele-density declined from 89.78 at the end of Dec-18 to 88.46 at the end of Mar-19.

7. Wireline subscriber declined from 21.87 million at the end of Dec-18 to 21.70 million at the end of Mar-19 with quarterly decline rate of 0.79%. The year-on-year (Y-O-Y) decline rate in wireline subscribers for Mar-19 is 4.89%.
8. Wireline Tele-density also declined from 1.67 at the end of Dec-18 to 1.65 at the end of Mar-19.
9. Total number of Internet subscribers increased from 604.21 million at the end of Dec-18 to 636.73 million at the end of Mar-19, registering a quarterly growth rate of 5.38%. Out of 636.73 million internet subscribers, number of Wired Internet subscribers are 21.68 million and number of Wireless Internet subscribers are 615.05 million.

Composition of internet subscription

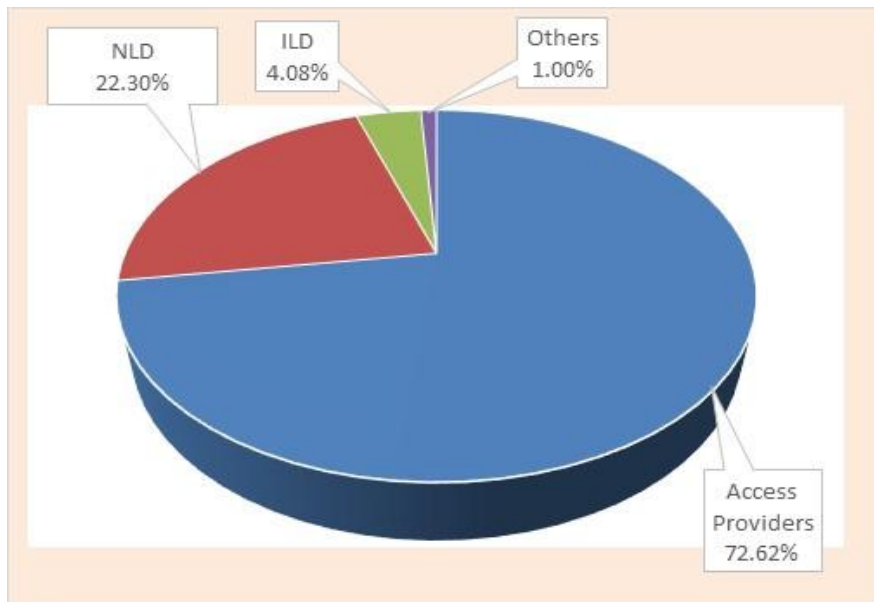


10. The Internet subscriber base is comprised of Broadband Internet subscriber base of 563.31 million and Narrowband Internet subscriber base of 73.42 million.

11. The broadband Internet subscriber base increased by 7.22% from 525.36 million at the end of Dec-18 to 563.31 million at the end of Mar-19. However, the narrowband Internet subscriber base declined by 6.89% from 78.86 million at the end of Dec-18 to 73.42 million at the end of Mar-19.
12. Monthly Average Revenue per User (ARPU) for wireless service increased by 1.80%, from ₹70.13 in QE Dec-18 to ₹71.39 in QE Mar-19. However, monthly ARPU for wireless service declined by 6.12% on yearly basis (Y-O-Y) in this quarter.
13. Prepaid ARPU per month increased from ₹60 in QE Dec-18 to ₹63 in QE Mar-19, however Postpaid ARPU per month declined from ₹296 in QE Dec-18 to ₹261 in QE Mar-19.
14. On an all India average, the overall MOU per subscriber per month for wireless service increased by 3.74% from 667 for QE Dec-18 to 692 in QE Mar-19.
15. Prepaid MOU per subscriber per month increased from 666 in QE Dec-18 to 694 in QE Mar-19. However, postpaid MOU per subscriber per month declined from 711 in QE Dec-18 to 641 in QE Mar-19.
16. Gross Revenue (GR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the QE Mar-19 has been ₹58,414 Crore and ₹35,932 Crore respectively. GR declined by 0.98% and AGR declined by 0.34% in QE Mar-19 as compared to previous quarter.
17. The year-on-year (Y-O-Y) growth in GR and AGR in QE Mar-19 over the same quarter in last year has been -6.08% and 0.66% respectively.

18. Pass-through charges declined from ₹22,936 Crore in QE Dec-18 to ₹22,482 Crore in QE Mar-19. The quarterly and yearly growth rates of pass-through charges for QE Mar-19 are -1.98% and -15.17% respectively.
19. The License Fee declined from ₹2,890 Crore for the QE Dec-18 to ₹2,888 Crore for the QE Mar-19. The quarterly and the year-on-year (Y-O-Y) growth rates of license fee are -0.08% and -1.52% respectively in this quarter.
20. Access services contributed 72.62% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Adjusted Gross Revenue (AGR), License Fee and Pass Through Charges increased by 0.29%, 0.10%, 0.46%, 0.60% respectively in QE Mar-19. However, Spectrum Usage Charges (SUC) declined quarterly by 0.70% during the same period.

Composition of Adjusted Gross Revenue in access services



21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, declined from ₹72.82 in QE Dec-18 to ₹72.49 in QE Mar-19.

22. 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"> • Period of applying credit/waiver/ adjustment to customer's account from the date of resolution of complaints 	<ul style="list-style-type: none"> • Accessibility of call centre/customer care • %age of calls answered by the operators (voice to voice) within 90 sec • %age requests for Termination/Closure of service complied within 7 days • Time taken for refund of deposits after closures

23. 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"> • %age of fault repaired by next working day (for urban areas) • 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 seconds 	<ul style="list-style-type: none"> • Fault incidences - No. of faults per 100 subs/month) • Mean time to Repair (MTTR)

24. A total number of 902 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 March, 2019.
25. As per the reporting to TRAI, done by broadcasters in pursuance of the Tariff Order (Broadcasting & Cable), dated 3rd March 2017, there are 328 pay channels as on 31st March, 2019, which include 229 SD (standard definition) pay TV channels and 99 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 December, 2018, there were 5 pay DTH service providers in the country.
27. DTH has attained net active subscriber base of around 72.44 million in QE 31st March, 2019. This is in addition the subscribers of free DTH services of Doordarshan.
28. Apart from the radio stations operated by All India Radio, the public broadcaster, as on 31st March, 2019, there are 356 operational private FM Radio stations in 98 cities with operational 33 Private FM Radio broadcaster as compared to 355 private FM Radio Stations in 97 cities with operational 33 FM Radio broadcasters in the previous quarter.
29. As per data received from MIB, as on 31st March, 2019, 251 Community Radio Stations are operational.

Snapshot

(Data as on Q.E. 31st March, 2019)

Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,183.51 Million
% change over the previous quarter	-0.79%
Urban Subscribers	669.16 Million
Rural Subscribers	514.35 Million
Market share of Private Operators	88.71%
Market share of PSU Operators	11.29%
Teledensity	90.11
Urban Teledensity	159.96
Rural Teledensity	57.47
Wireless Subscribers	
Total Wireless Subscribers	1,161.81 Million
% change over the previous quarter	-1.21%
Urban Subscribers	650.49 Million
Rural Subscribers	511.32 Million
Market share of Private Operators	89.74%
Market share of PSU Operators	10.26%
Teledensity	88.46
Urban Teledensity	155.49
Rural Teledensity	57.13
Total Wireless Data Usage during the quarter	15,850,560 TB
No. of total Public Mobile Radio Trunk Services (PMRTS)	60,078
No. of Very Small Aperture Terminals (VSAT)	2,97,465
Wireline Subscribers	
Total Wireline Subscribers	21.70 Million
% change over the previous quarter	-0.79%
Urban Subscribers	18.67 Million
Rural Subscribers	3.02 Million
Market share of Private Operators	33.58%
Market share of PSU Operators	66.42%
Teledensity	1.65
Urban Teledensity	4.46
Rural Teledensity	0.34
No. of Village Public Telephones (VPT)	1,30,376
No. of Public Call Office (PCO)	2,55,268

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹ 58,414 Crore
% change in GR over the previous quarter	-0.98%
Adjusted Gross Revenue (AGR) during the quarter	₹ 35,932 Crore
% change in AGR over the previous quarter	-0.34%
Share of Public sector undertakings in Access AGR	9.57%
Monthly Average Revenue Per User (ARPU) for Access Services	₹ 72.49
Internet/Broadband Subscribers	
Total Internet Subscribers	636.73 Million
% change over previous quarter	5.38%
Narrowband subscribers	73.42 Million
Broadband subscribers	563.31 Million
Wired Internet Subscribers	21.68 Million
Wireless Internet Subscribers	615.05 Million
Urban Internet Subscribers	409.72 Million
Rural Internet Subscribers	227.01 Million
Total Internet Subscribers per 100 population	48.48
Urban Internet Subscribers per 100 population	97.94
Rural Internet Subscribers per 100 population	25.36
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking /uplinking	902
Number of Pay TV Channels as reported by broadcasters	328
Number of private FM Radio Stations (excluding All India Radio)	356
Number of net active subscribers with pay DTH operators	72.44 Million
Number of Operational Community Radio Stations	251
Number of pay DTH Operators	5
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service (GSM+CDMA+LTE)	₹ 71.39
Minutes of Usage (MOU) per subscriber per month - Wireless Service (GSM+CDMA+LTE)	692 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	197 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	9.06 GB
Average cost to subscriber per GB wireless data during the quarter	₹ 7.95