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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 9th November, 2020

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

"Indian Telecom Services Performance Indicator Report" for the Quarter ending April-June, 2020

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 30th June, 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 April, 2020 to 30th June, 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

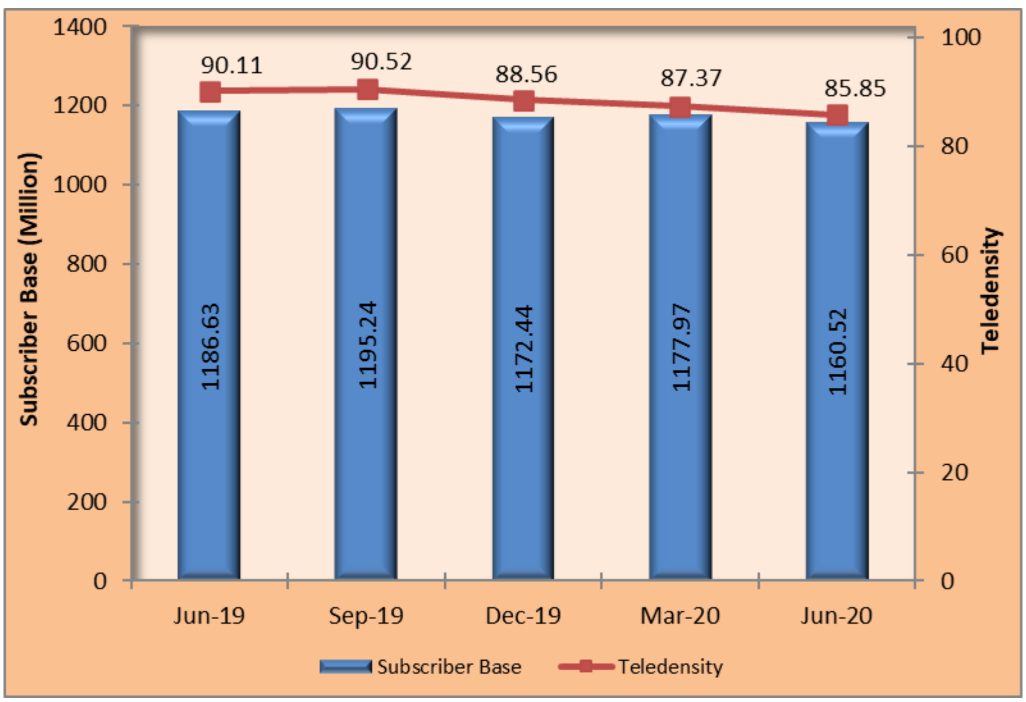
(S. K. Mishra)
Pr. Advisor (F&EA)

The Indian Telecom Services Performance Indicators
April – June, 2020

Executive Summary

1. The number of telephone subscribers in India decreased from 1,177.97 million at the end of Mar-20 to 1,160.52 million at the end of Jun-20, registering a decline rate of 1.48% over the previous quarter. This reflects Year-On-Year (Y-O-Y) decline rate of 2.20% over the same quarter of the last year. The overall Tele-density in India also decreased from 87.37 as in QE Mar-20 to 85.85 as in QE Jun-20.

Trends in Telephone subscribers and Tele-density in India

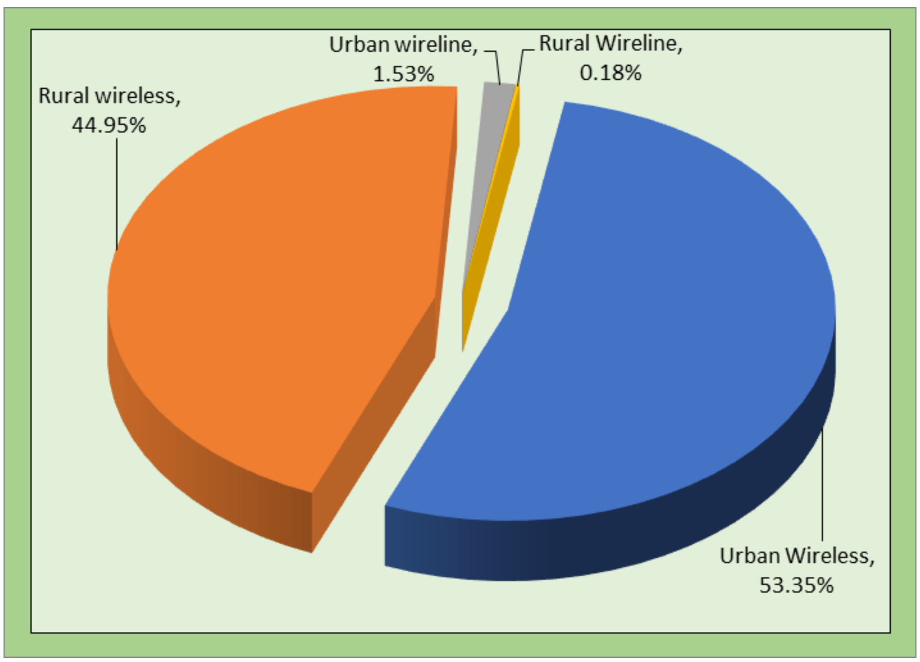


2. Telephone subscribers in Urban areas decreased from 656.46 million at the end of Mar-20 to 636.83 million at the end of Jun-20 and Urban Tele-density also declined from 142.31 to 137.35 during the same period.

3. Rural telephone subscribers increased from 521.51 million at the end of Mar-20 to 523.69 million at the end of Jun-20 and Rural Tele-density also increased from 58.79 at the end of Mar-20 to 58.96 at the end of June-20.

4. Out of the total subscription, the share of Rural subscription increased from 44.27% at the end of Mar-20 to 45.13% at the end of Jun-20.

Composition of Telephone Subscribers



5. With a net decrease of 17.04 million subscribers during the quarter, the total wireless subscriber base decreased from 1,157.75 million at the end of Mar-20 to 1,140.71 million at the end of Jun-20, registering a decline rate of 1.47% over the previous quarter. Wireless subscriptions declined on Y-O-Y basis at the rate of 2.12% during the year.

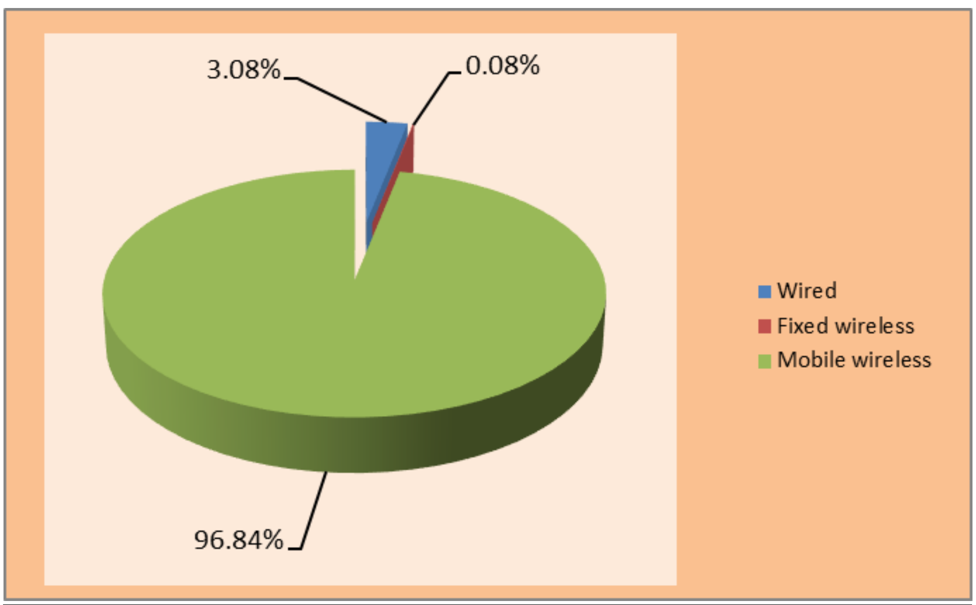
6. Wireless Tele-density declined from 85.87 at the end of Mar-20 to 84.38 at the end of Jun-20 with quarterly decline rate of 1.73%.

7. Wireline subscribers decreased from 20.22 million at the end of Mar-20 to 19.81 million at the end of Jun-20 with a quarterly decline rate of 2.02% and on a Y-O-Y basis, wireline subscriptions also declined by 6.42% in QE Jun-20.

8. Wireline Tele-density decreased from 1.50 at the end of Mar-20 to 1.47 at the end of Jun-20.

9. Total number of Internet[1] subscribers increased from 743.19 million at the end of Mar-20 to 749.07 million at the end of Jun-20, registering a quarterly growth rate of 0.79%. Out of 749.07 million internet subscribers, number of Wired Internet subscribers are 23.06 million and number of Wireless Internet subscribers are 726.01 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband[2] Internet subscriber base of 698.23 million and Narrowband[3] Internet subscriber base of 50.84 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.

11. The broadband Internet subscriber base increased by 1.57% from 687.44 million at the end of Mar-20 to 698.23 million at the end of Jun-20. However, the narrowband Internet subscriber base declined by 8.81% from 55.75 million at the end of Mar-20 to 50.84 million at the end of Jun-20.

12. Monthly Average Revenue per User (ARPU)[4] for wireless service decreased by 1.50%, from ₹91.49 in QE Mar-20 to ₹90.12 in QE Jun-20. On Y-O-Y basis, monthly ARPU for wireless service increased by 21.30% in this quarter.

13. Prepaid ARPU per month for QE Jun-20 remained same i.e. ₹84 as it was QE Mar-20 however for Postpaid ARPU per month decreased from ₹244 in QE Mar-20 to ₹224 in QE Jun-20.

14. On an all India average, the overall Minutes of Usage (MOU)[5] per subscriber per month for wireless service decreased by 0.80% from 750 in QE Mar-20 to 744 in QE Jun-20.

15. Prepaid MOU per subscriber per month decreased from 757 in QE Mar-20 to 748 in QE Jun-20. However, Postpaid MOU per subscriber per month increased from 611 in QE Mar-20 to 648 in QE Jun-20.

16. Gross Revenue[6] (GR) and Adjusted Gross Revenue[7] (AGR) of Telecom Service Sector for the Q.E. Jun-20 has been ₹66,858 Crore and

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(Source-ITU)

[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.

₹44,128 Crore respectively. GR and AGR decreased by 1% and 1.81% respectively in Q.E. Jun-20 as compared to previous quarter.

17. The Y-O-Y growth in GR and AGR in Q.E. Jun-20 over the same quarter in last year has been 8.65% and 12.79% respectively.

18. Pass-through[8] charges increased from ₹22,593 Crore in QE Mar-20 to ₹22,730 Crore in QE Jun-20 with quarterly growth rate of 0.60%. The Y-O-Y growth rate of 1.42% has been recorded in pass-through charges for QE Jun-20.

19. The License Fee[9] decreased from ₹3,604 Crore for the QE Mar-20 to ₹3,526 Crore for the QE Jun-20. The quarterly and the Y-O-Y growth rates of license fee are -2.16% and 12.57% respectively in this quarter.

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[6] 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.

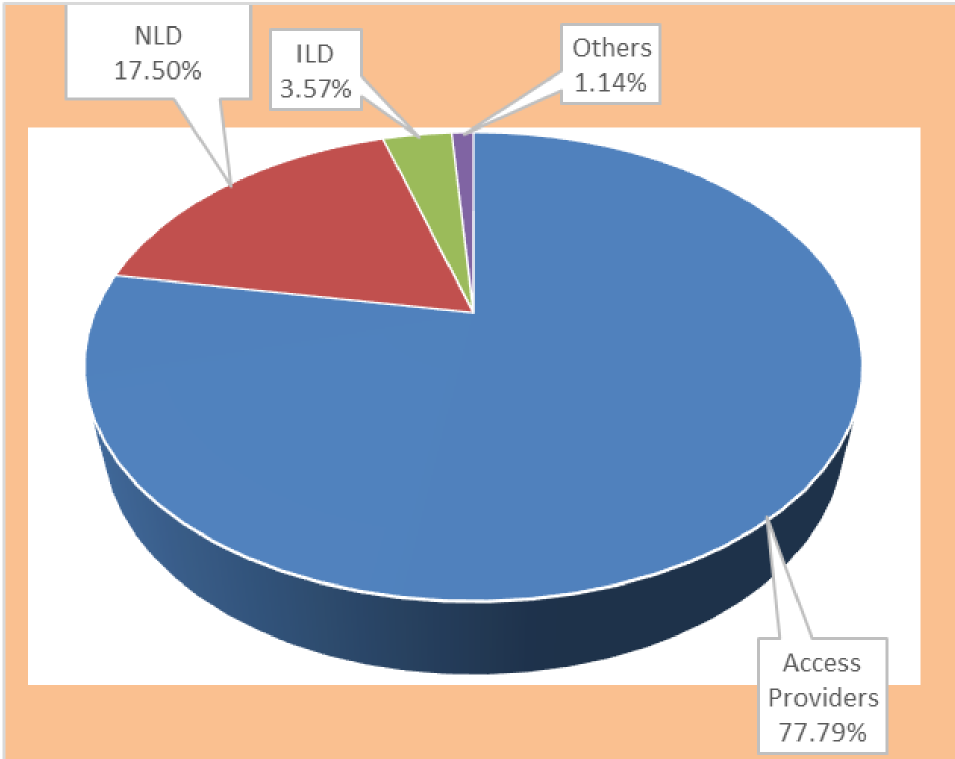
[7] Adjusted Gross Revenue: The following shall be excluded from the Gross Revenue to arrive at the AGR:

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
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.

Service-wise composition of Adjusted Gross Revenue



20. Access services contributed 77.79% 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] decreased by 0.15%, 0.49%, 0.83% and 3.83% respectively in QE Jun-20. However, Pass Through Charges increased quarterly by 0.63% during the same period.

21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, increased from ₹97.64 in QE Mar-20 to ₹98.01 in QE Jun-20.

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[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)

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
• "Fault repair" Fault incidences No. of faults per 100 subs/month)	• **"Fault repair"** % Fault repaired by next working day (for urban areas) • **"Mean time to Repair"** (MTTR) • **"Metering and Billing"** Metering and billing credibility - post-paid, • **"Response time to the customer for assistance"** - Accessibility of call centre/ customer care - %age of calls answered by the operators (voice to voice) within 90 seconds • **"Termination / closure of service"-** Time taken for refund of deposits after closures

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
• Network QoS DCR Spatial Distribution Measure [Network_ QSD (90,90)] • Metering and billing credibility - post paid	• Accessibility of call centre/ customer care • %age of calls answered by the operators (voice to voice) within 90 sec • Time taken for refund of deposits after closures

24. A total number of 909 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 30^{th} June, 2020.

25. As per the reporting done by broadcasters in pursuance of the Tariff Order (Broadcasting & Cable), dated 3^{rd} March 2017, as amended, there are 332 pay channels as on 30^{th} June, 2020, which include 235 SD (standard definition) pay TV channels and 97 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 30^{th} June, 2020, there were 4 pay DTH service providers in the country.

27. Pay DTH has attained total active subscriber base of around 70.58 million in QE 30^{th} June, 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 30^{th} June 2020, there are 367 operational private FM Radio stations in 105 cities with operational 31 Private FM Radio broadcasters as compared to 368 private FM Radio Stations in 105 cities with operational 32 FM Radio broadcasters in the previous quarter.

29. The reported advertisement revenue during the quarter ending 30^{th} June, 2020 in respect of 366 private FM Radio stations is ₹98.41 crore as against ₹400.64 crore in respect of 367 private FM Radio stations for the previous quarter.

30. As per data received from MIB, as on 30^{th} June, 2020, 300 Community Radio Stations are operational in the country.

Snapshot

(Data as on Q.E. 30th June, 2020)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,160.52 Million
% change over the previous quarter	-1.48%
Urban Subscribers	636.83 Million
Rural Subscribers	523.69 Million
Market share of Private Operators	88.55%
Market share of PSU Operators	11.45%
Tele-density	85.85
Urban Tele-density	137.35
Rural Tele-density	58.96
Wireless Subscribers	
Total Wireless Subscribers	1,140.71 Million
% change over the previous quarter	-1.47%
Urban Subscribers	619.11 Million
Rural Subscribers	521.60 Million
Market share of Private Operators	89.33%
Market share of PSU Operators	10.67%
Tele-density	84.38
Urban Tele-density	133.53
Rural Tele-density	58.72
Total Wireless Data Usage during the quarter	25,979 million GB
Number of Public Mobile Radio Trunk Services (PMRTS)	64,838
Number of Very Small Aperture Terminals (VSAT)	2,95,571
Wireline Subscribers	
Total Wireline Subscribers	19.81 Million
% change over the previous quarter	-2.02%
Urban Subscribers	17.72 Million
Rural Subscribers	2.09 Million
Market share of PSU Operators	56.84%
Market share of Private Operators	43.16%
Tele-density	1.47
Rural Tele-density	0.24
Urban Tele-density	3.82
No. of Village Public Telephones (VPT)	68,406
No. of Public Call Office (PCO)	1,61,937

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹66,858 Crore
% change in GR over the previous quarter	-1%
Adjusted Gross Revenue (AGR) during the quarter	₹44,128 Crore
% change in AGR over the previous quarter	-1.81%
Share of Public sector undertakings in Access AGR	7.91%
Monthly Average Revenue Per User (ARPU) for Access Services	₹98.01
Internet/Broadband Subscribers	
Total Internet Subscribers	749.07 Million
% change over previous quarter	0.79%
Narrowband subscribers	50.84 Million
Broadband subscribers	698.23 Million
Wired Internet Subscribers	23.05 Million
Wireless Internet Subscribers	726.01 Million
Urban Internet Subscribers	455.98 Million
Rural Internet Subscribers	293.09 Million
Total Internet Subscribers per 100 population	55.41
Urban Internet Subscribers per 100 population	98.35
Rural Internet Subscribers per 100 population	33
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	909
Number of Pay TV Channels as reported by broadcasters	332
Number of private FM Radio Stations (excluding All India Radio)	367
Number of total active subscribers with pay DTH operators	70.58 Million
Number of Operational Community Radio Stations	300
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	₹90.12
Minutes of Usage (MOU) per subscriber per month - Wireless Service	744 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	124.07 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	12.15 GB
Average revenue realization per subscriber per GB wireless data during the quarter	10.55