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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 27th June, 2018

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

“Indian Telecom Services Performance Indicator Report” for the Quarter ending January-March, 2018

TRAI today has released the **“Indian Telecom Services Performance Indicator Report”** for the Quarter ending 31st March, 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 January, 2018 to 31st March, 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

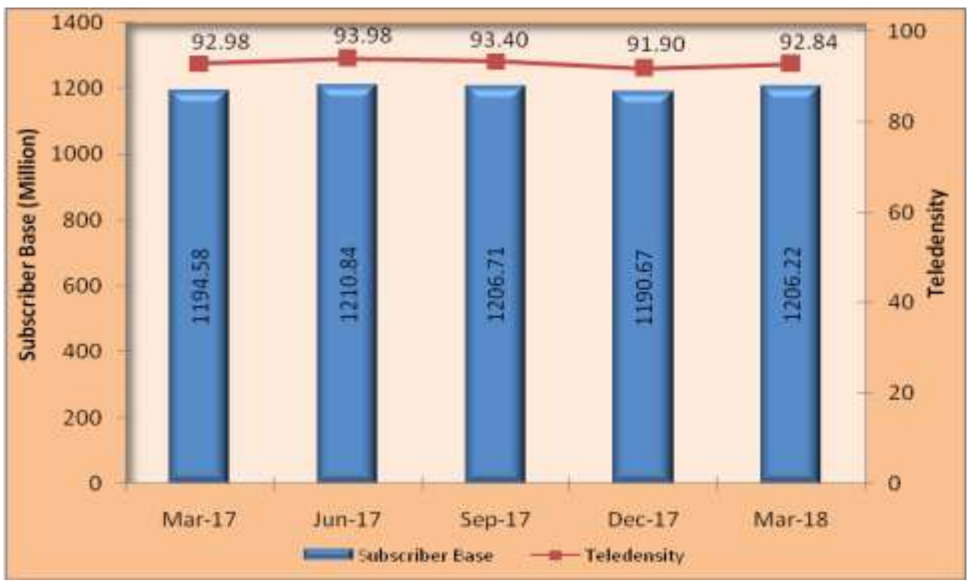
(S. K. Mishra)
Pr. Advisor (F&EA)

The Indian Telecom Services Performance Indicators
January – March, 2018

Executive Summary

1. The number of telephone subscribers in India increased from 1,190.67 million at the end of Dec-17 to 1,206.22 million at the end of Mar-18, registering a growth rate of 1.31% over the previous quarter. This reflects year-on-year (Y-O-Y) growth of 0.97% over the same quarter of last year. The overall Teledensity in India increased from 91.90 as on QE Dec-17 to 92.84 as on QE Mar-18.

Trends in Telephone subscribers and Teledensity in India

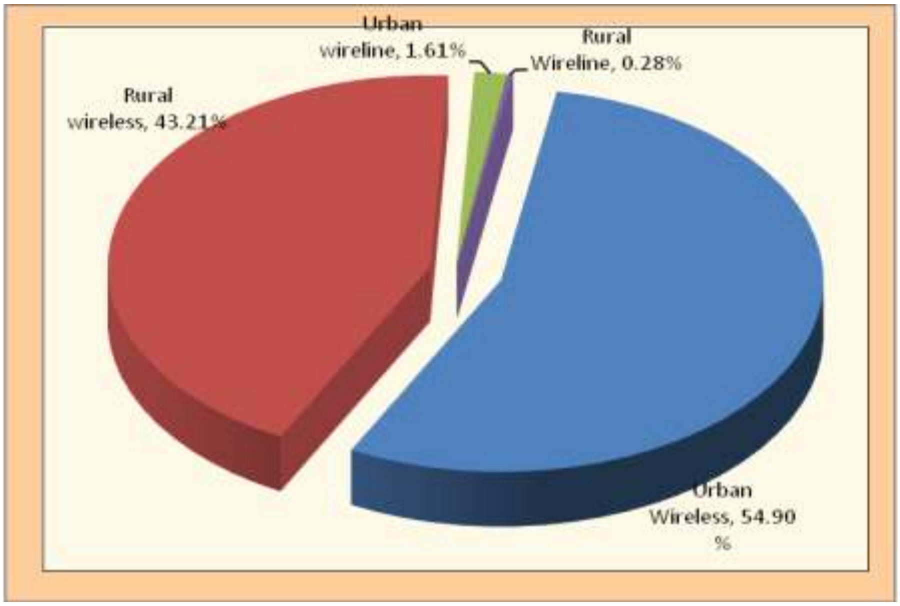


2. Subscription in Urban Areas declined from 688.25 million at the end of Dec-17 to 681.61 million at the end of Mar-18 and Urban Teledensity also declined from 168.29 to 165.90 during the same period.

3. Rural subscription increased from 502.42 million at the end of Dec-17 to 524.61 million at the end of Mar-18 and Rural Teledensity also increased from 56.66 at the end of Dec-17 to 59.05 at the end of Mar-18.

4. Out of the total subscription, the share of Rural subscription increased from 42.20% at the end of Dec-17 to 43.49% at the end of Mar-18.

Composition of Telephone Subscribers



5. With a net addition of 15.97 million subscribers during the quarter, total wireless (GSM incl. LTE + CDMA) subscriber base increased from 1,167.44 million at the end of Dec-17 to 1,183.41 million at the end of Mar-18, registering a growth rate of 1.37% over the previous quarter. The year-on-year (Y-O-Y) growth rate of wireless subscribers for Mar-18 is 1.33%.

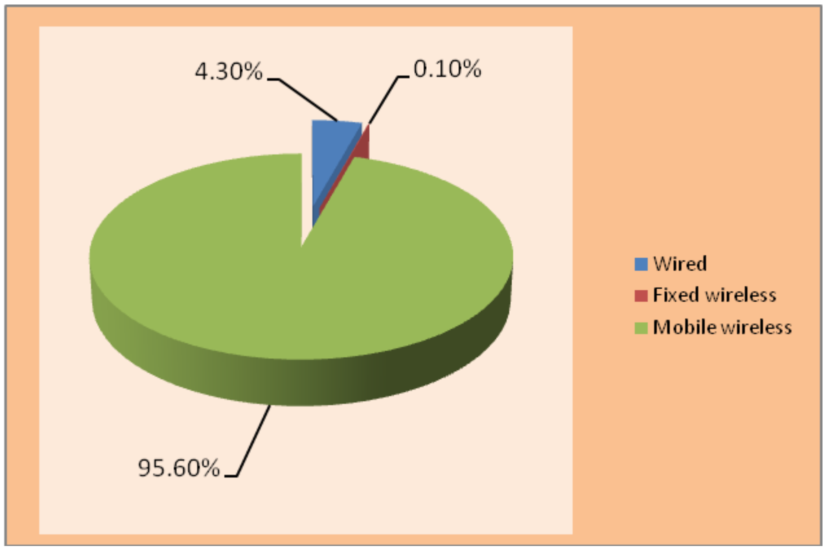
6. Wireless Tele-density increased from 90.11 at the end of Dec-17 to 91.09 at the end of Mar-18.

7. Wireline subscriber declined from 23.23 million at the end of Dec-17 to 22.81 million at the end of Mar-18 with quarterly decline rate of 1.82%. The year-on-year (Y-O-Y) decline rate in wireline subscribers for Mar-18 is 6.52%.

8. Wireline Teledensity declined from 1.79 at the end of Dec-17 to 1.76 at the end of Mar-18.

9. Total number of Internet subscribers increased from 445.96 million at the end of Dec-17 to 493.96 million at the end of Mar-18, registering a quarterly growth rate of 10.76%. Out of 493.96 million internet subscribers, Wired Internet subscribers are 21.24 million and Wireless Internet subscribers are 472.72 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband Internet subscriber base of 412.60 million and Narrowband Internet subscriber base of 81.35 million.

11. The broadband Internet subscriber base grew by 13.71% from 362.87 million at the end of Dec-17 to 412.60 million at the end of Mar-18. On the other hand, the narrowband Internet subscriber base declined by 2.09% from 83.09 million at the end of Dec-17 to 81.35 million at the end of Mar-18.

12. Monthly Average Revenue per User (ARPU) for GSM service (including LTE) declined by 4.22%, from ₹79 in QE Dec-17 to ₹76 in QE Mar-18. Monthly ARPU for GSM service (including LTE) declined by 8.03% on Y-O-Y in this quarter.

13. Prepaid ARPU for GSM service per month declined from ₹67 in QE Dec-17 to ₹62 in QE Mar-18, however Postpaid ARPU per month increased from ₹348 in QE Dec-17 to ₹360 in QE Mar-18.

14. On an all India average, the overall MOU per subscriber per month for GSM service increased by 17.97% from 495 for QE Dec-17 to 584 in QE Mar-18.

15. Prepaid MOU per subscriber for GSM service increased from 481 in QE Dec-17 to 575 in QE Mar-18, however postpaid MOU declined from 786 in QE Dec-17 to 776 in QE Mar-18.

16. Monthly ARPU for CDMA full mobility service declined by 28.54%, from ₹111 in QE Dec-17 to ₹79 in QE Mar-18 and Y-O-Y basis Monthly ARPU for CDMA full mobility service declined by 39.61% in this quarter.

17. The total MOU per subscriber per month for CDMA full mobility service declined by 46.42%, from 112 in QE Dec-17 to 61 in QE Mar-18. The outgoing MOUs declined from 73 in QE Dec-17 to 39 in QE Mar-18, and incoming MOUs also declined from 40 in QE Dec-17 to 22 in QE Mar-18.

18. Gross Revenue (GR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the QE Mar-18 has been ₹62,198 Crore and ₹35,697 Crore respectively. GR increased by 1.82%, however AGR declined by 7.37% in QE Mar-18 as compared to previous quarter.

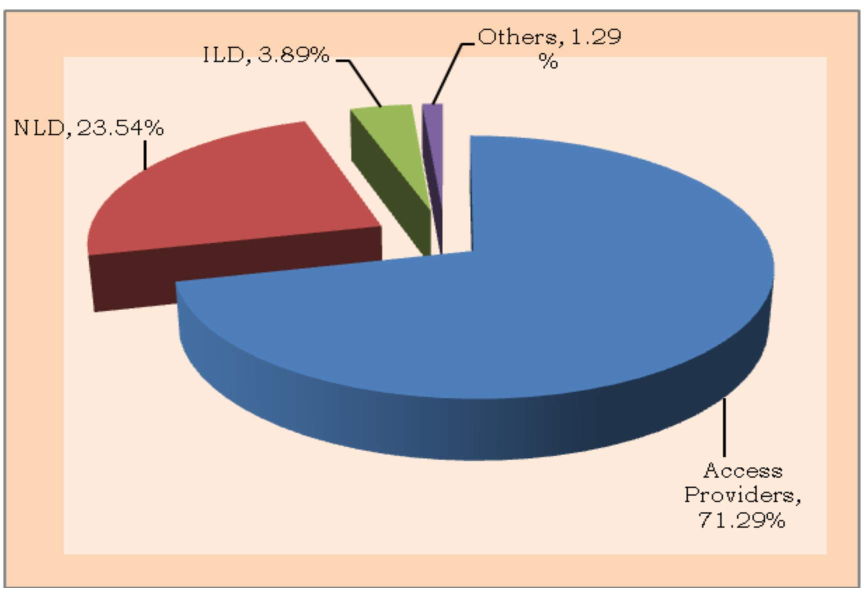
19. The year-on-year (Y-O-Y) growth in GR and AGR over the same quarter in last year has been -1.76% and -12.57% respectively.

20. Pass-through charges increased from ₹22,552 Crore in QE Dec-17 to ₹26,501 in QE Mar-18. The quarterly and the year-on-year (Y-O-Y) growth rates of pass-through charges for QE Mar-18 are 17.51% and 17.87% respectively.

21. The License Fee declined from ₹3,104 Crore for the QE Dec-17 to ₹2,932 Crore for the QE Mar-18. The quarterly and the year-on-year (Y-O-Y) growth rates of license fee are -5.54% and -12.76% respectively in this quarter.

22. Access services contributed 71.29% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR) and Pass Through Charges increased by 1.82% and 17.51% respectively in QE Mar-18. However, Adjusted Gross Revenue (AGR), License Fee and Spectrum Usage Charges(SUC) declined by 7.37%, 5.54% and 8.79% respectively during the quarter.

Composition of Adjusted Gross Revenue in access services



23. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, declined from ₹80.77 in QE Dec-17 to ₹71.62 in QE Mar-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**
• BS Accumulated down-time (not available for service) (%) • Worst affected BTSs due to downtime (%age) • TCH, RAB and E-RAB Congestion (%age) • 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 • Period of applying credit/waiver/adjustment to customer's account from the date of resolution of complaints • 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	• %age of calls answered by the operators (voice to voice) within 90 sec

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**
• Fault incidences (No. of faults per 100 subscribers per month) • %age of calls answered by the operators (voice to voice) within 90 seconds • Termination/Closure of service 100% within 7 days	• Response time to the customer for Assistance – Accessibility of call centre/customer care

26. A total number of 875 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking/uplinking, as on 31st March, 2018.

27. During the quarter ending 31st March, 2018, there were 308 pay channels as reported by 49 broadcasters as compared to 304 pay channels reported in the previous quarter. 308 pay channels include 213 SD pay TV channels and 95 HD Pay TV channels. During the quarter ending 31st March, 2018, as per the reporting, five new pay channels were commenced, one FTA channel was converted into pay channel and two pay channels were reported to be discontinued.

28. Since its introduction in the year 2003, Indian DTH service has displayed a phenomenal growth. During the QE 31st March, 2018, there are 5 pay DTH service providers as compared to 6 pay DTH service providers reported in the previous quarter. During the quarter, intimation of merger of M/s Videocon d2h Ltd with M/s DISH TV India Ltd w.e.f. 22.03.2018 has been received.

29. DTH has attained net pay active subscriber base of around 67.53 million in QE 31st March, 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 31st March, 2018, there are 324 operational private FM Radio stations and 86 existing cities with operational 34 FM Radio broadcasters as compared to 326 private FM Radio Stations 86 cities with operational 34 FM Radio broadcasters in the previous quarter.

31. As per data received from MIB, as on 31st March, 2018, there are 216 Community Radio Stations are operational.

Snapshot

(Data As on Q.E. 31st March, 2018)	
Telecom Subscribers (Wireless +Wireline)	
Total Subscribers	1,206.22 Million
% change over the previous quarter	1.31%
Urban Subscribers	681.61 Million
Rural Subscribers	524.61 Million
Market share of Private Operators	89.15%
Market share of PSU Operators	10.85%
Teledensity	92.84
Urban Teledensity	165.90
Rural Teledensity	59.05
Wireless Subscribers	
Total Wireless Subscribers	1,183.41 Million
% change over the previous quarter	1.37%
Urban Subscribers	662.18 Million
Rural Subscribers	521.23 Million
GSM Subscribers	1,179.12 Million
CDMA Subscribers	4.29 Million
Market share of Private Operators	90.26%
Market share of PSU Operators	9.74%
Teledensity	91.09
Urban Teledensity	161.17
Rural Teledensity	58.67
Total Wireless Data Usage during the quarter	8,067,633 TB
Wireline Subscribers	
Total Wireline Subscribers	22.81 Million
% change over the previous quarter	-1.82%
Urban Subscribers	19.43 Million
Rural Subscribers	3.38 Million
Market share of Private Operators	31.55%
Market share of PSU Operators	68.45%
Teledensity	1.76
Urban Teledensity	4.73
Rural Teledensity	0.38
No. of Village Public Telephones (VPT)	1,99,057
No. of Public Call Office (PCO)	3,60,053

Telecom Financial Data	
Gross Revenue (GR) during the quarter	₹ 62,198 Crore
% change in GR over the previous quarter	1.82%
Adjusted Gross Revenue (AGR) during the quarter	₹ 35,697 Crore
% change in AGR over the previous quarter	-7.37%
Share of Public sector undertakings in Access AGR	10.25%
Monthly Average Revenue Per User (ARPU) for Access Services	₹ 71.62
Internet/Broadband Subscribers	
Total Internet Subscribers	493.96 Million
% change over previous quarter	10.76%
Narrowband subscribers	81.35 Million
Broadband subscribers	412.60 Million
Wired Internet Subscribers	21.24 Million
Wireless Internet Subscribers	472.72 Million
Urban Internet Subscribers	348.13 Million
Rural Internet Subscribers	145.83 Million
Total Internet Subscribers per 100 population	38.02
Urban Internet Subscribers per 100 population	84.74
Rural Internet Subscribers per 100 population	16.41
Broadcasting & Cable Services	
Number of private satellite TV channels permitted by the Ministry of I&B for uplinking only/downlinking /uplinking	875
Number of Pay TV Channels as reported by broadcasters	308
Number of private FM Radio Stations (excluding All India Radio)	324
Number of Pay Subscribers net Active with Private DTH Operators	67.53 Million
Number of Operational Community Radio Stations	216
Number of pay DTH Operators	5
Revenue & Usage Parameters	
Monthly ARPU GSM Full Mobility Service including LTE	₹ 76
Monthly ARPU CDMA Full Mobility Service	₹ 79
Minutes of Usage (MOU) per subscriber per month - GSM Full Mobility Service including LTE	584 Minutes
Minutes of Usage (MOU) per subscriber per month - CDMA Full Mobility Service	61 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	258 Million
Data Usage of Mobile Users	
Average Data Usage per subscriber per month – GSM including LTE (2G+3G+4G)	2,447 MB
Average Data Usage per subscriber per month - CDMA	173 MB
Average Data Usage per subscriber per month – Total(GSM+CDMA)	2,437 MB
Average outgo per GB data for GSM including LTE (2G+3G+4G)	₹ 14.94
Average outgo per GB data for CDMA	₹ 198