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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 27th August, 2021

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

“Indian Telecom Services Performance Indicator Report” for the Quarter ending January-March, 2021

TRAI today has released the **“Indian Telecom Services Performance Indicator Report”** for the Quarter ending 31st March, 2021. 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, 2021 to 31st March, 2021 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, Shri M.P. Tangirala, Pr. Advisor (F&EA), TRAI may be contacted on Tel. +91-11-23221856, Fax. +91-11-23235249 and e-mail: mptangirala@trai.gov.in.

RAGHUNANDAN VARTHAKAVI

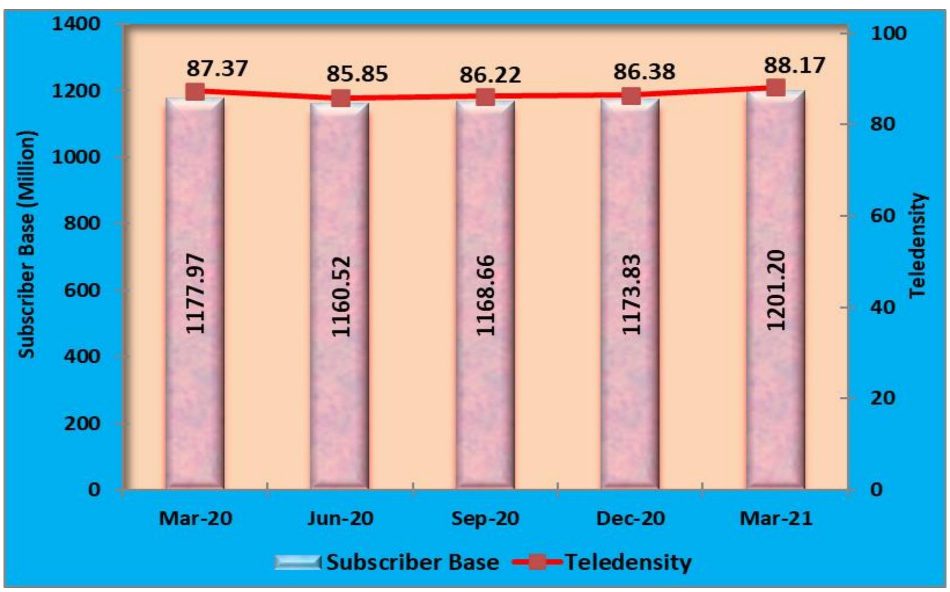
(**V. Raghunandan**)
Secretary, TRAI

The Indian Telecom Services Performance Indicators
January–March, 2021

Executive Summary

1. The number of telephone subscribers in India increased from 1,173.83 million at the end of Dec-20 to 1,201.20 million at the end of Mar-21, registering a growth rate of 2.33% over the previous quarter. This reflects Year-On-Year (Y-O-Y) growth rate of 1.97% over the same quarter of the last year. The overall Tele-density in India also increased from 86.38% as in QE Dec-20 to 88.17% as in QE Mar-21.

Trends in Telephone subscribers and Tele-density in India

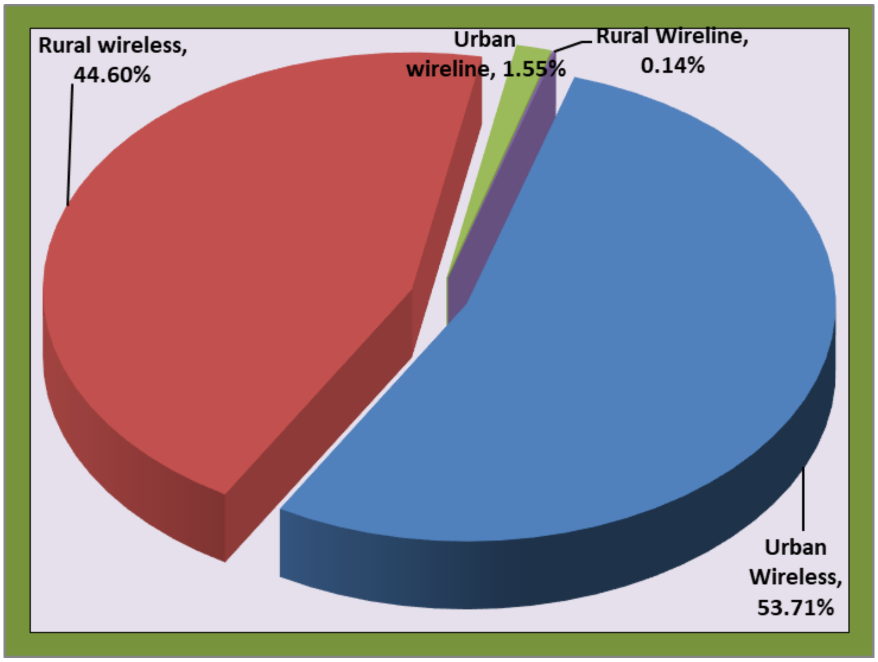


2. Telephone subscribers in Urban areas increased from 647.91 million at the end of Dec-20 to 663.77 million at the end of Mar-21 and Urban Tele-density also increased from 138.34% to 141.03% during the same period.

3. Rural telephone subscribers increased from 525.92 million at the end of Dec-20 to 537.42 million at the end of Mar-21 and Rural Tele-density also increased from 59.05% to 60.27% during the same period.

4. Out of the total subscription, the share of Rural subscription decreased from 44.80% at the end of Dec-20 to 44.74% at the end of Mar-21.

Composition of Telephone Subscribers



5. With a net increase of 27.18 million subscribers during the quarter, the total wireless subscriber base increased from 1,153.77 million at the end of Dec-20 to 1,180.96 million at the end of Mar-21, registering a growth rate of 2.36% over the previous quarter. On Y-O-Y basis, wireless subscriptions also increased at the rate of 2% during the year.

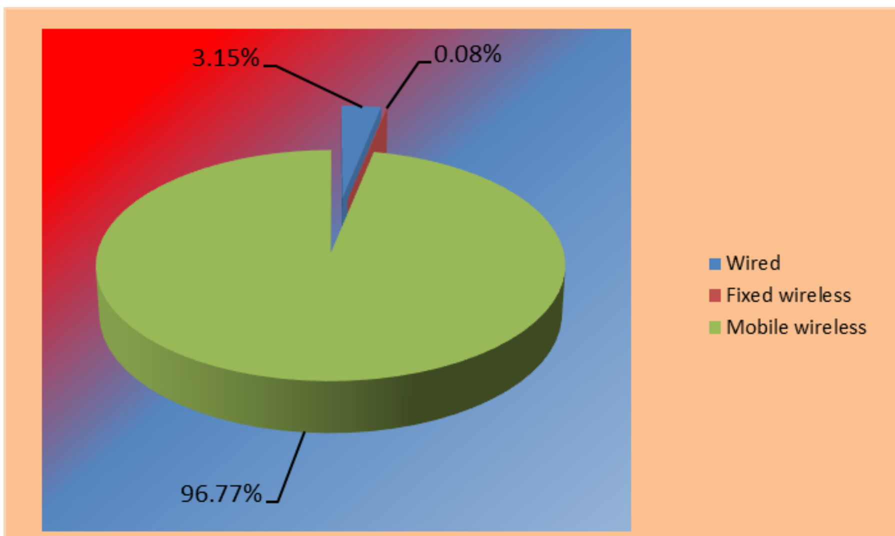
6. Wireless Tele-density increased from 84.90% at the end of Dec-20 to 86.68% at the end of Mar-21 with quarterly growth rate of 2.10%.

7. Wireline subscribers increased from 20.05 million at the end of Dec-20 to 20.24 million at the end of Mar-21 with a quarterly growth rate of 0.94% and, on Y-O-Y basis, wireline subscriptions also increased by 0.11% at the end of QE Mar-21.

8. Wireline Tele-density increased from 1.48% at the end of Dec-20 to 1.49% at the end of Mar-21 with quarterly growth rate of 0.68%.

9. Total number of Internet[1] subscribers increased from 795.18 million at the end of Dec-20 to 825.30 million at the end of Mar-21, registering a quarterly growth rate of 3.79%. Out of 825.30 million internet subscribers, number of Wired Internet subscribers are 26 million and number of Wireless Internet subscribers are 799.31 million.

Composition of internet subscription



10. The Internet subscriber base is comprised of Broadband[2] Internet subscriber base of 778.09 million and Narrowband[3] Internet subscriber base of 47.21 million.

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[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.

(Source-ITU)

11. The broadband Internet subscriber base increased by 4.11% from 747.41 million at the end of Dec-20 to 778.09 million at the end of Mar-21. However, the narrowband Internet subscriber base declined by 1.18% from 47.77 million at the end of Dec-20 to 47.21 million at the end of Mar-21.

12. Monthly Average Revenue per User (ARPU)[4] for wireless service increased by 1.90%, from Rs.101.65 in QE Dec-20 to Rs.103.58 in QE Mar-21. On Y-O-Y basis, monthly ARPU for wireless service increased by 13.21% in this quarter.

13. Prepaid ARPU per month increased from to Rs.95 in QE Dec-20 to Rs.97 in QE Mar-21, however, Postpaid ARPU per month decreased from Rs.227 in QE Dec-20 to Rs.226 in QE Mar-21.

14. On all India average, the overall Minutes of Usage (MOU)[5] per subscriber per month for wireless service increased by 4.12% from 785 in QE Dec-20 to 818 in QE Mar-21.

15. Prepaid MOU per subscriber per month increased from 793 in QE Dec-20 to 829 in QE Mar-21. Postpaid MOU per subscriber per month decreased from 631 in QE Dec-20 to 597 in QE Mar-21.

16. Gross Revenue[6] (GR) and Adjusted Gross Revenue[7] (AGR) of Telecom Service Sector for the Q.E. Mar-21 has been Rs.66,784 Crore and

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[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.

[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

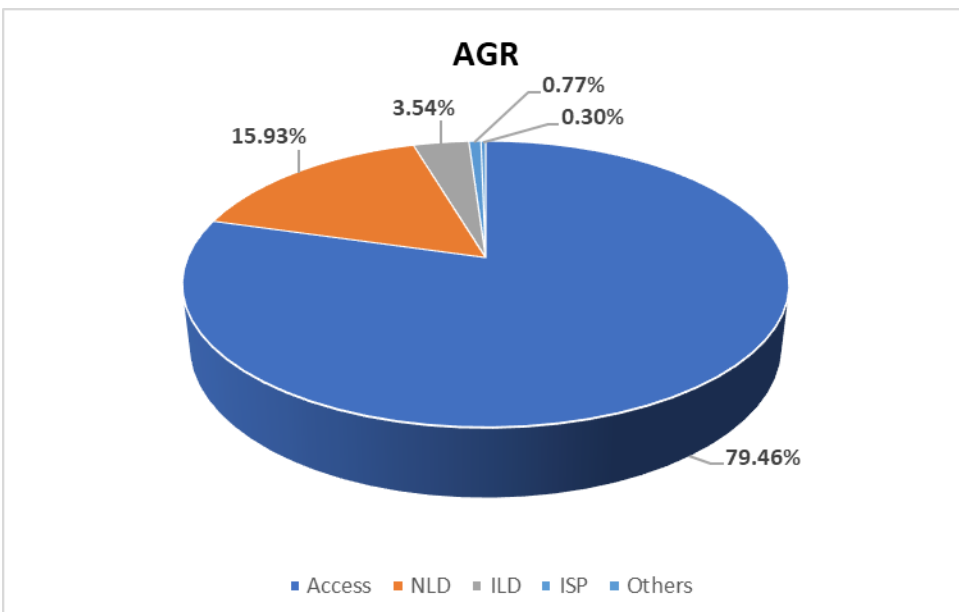
Rs.48,587 Crore respectively. GR decreased by 6.17% and AGR increased by 2.03% in Q.E. Mar-21, as compared to previous quarter.

17. The Y-O-Y growth in GR and AGR in Q.E. Mar-21 over the same quarter in last year has been -1.11% and 8.12% respectively.

18. Pass-through[8] charges decreased from Rs.23,966 Crore in QE Dec-20 to Rs.18,196 Crore in QE Mar-21 with quarterly decline rate of 24.07%. The Y-O-Y decline rate of 19.46% has been recorded in pass-through charges for QE Mar-21.

19. The License Fee[9] increased from Rs.3,809 Crore for the QE Dec-20 to Rs.3,979 Crore for the QE Mar-21. The quarterly and the Y-O-Y growth rates of license fee are 4.44% and 10.40% respectively in this quarter.

Service-wise composition of Adjusted Gross Revenue



[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.

20. Access services contributed 79.46% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Adjusted Gross Revenue (AGR), License Fee Spectrum Usage Charges (SUC)[10] and Pass Through Charges increased by -5.99%, 0.88%, 3.12%, 0.14% and -23.06% respectively in QE Mar-21.

21. 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
❖ "Mean time to Repair" (MTTR) ≤10 Hrs ❖ Accessibility of call centre/customer care 95% ❖ "%age of calls answered by the operators (voice to voice) within 90 seconds ≥ 95%	❖ "%Fault repaired by next working day (for urban areas) ≥ 85%

22. 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
❖ Worst affected BSs due to down-time %age ❖ Accessibility of call centre/ customer care ❖ Time taken for refund of deposits after closures	❖ %age of calls answered by the operators (voice to voice) within 90 Seconds

23. A total number of 901 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 31st March, 2021.

[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)

24. As per the reporting done by broadcasters in pursuance of the Telecommunication (Broadcasting and Cable) Services (Eighth) (Addressable Systems) Tariff Order, 2017 dated 3rd March 2017, as amended, there are 327 satellite pay channels as on 31st March 2021, which include 235 SD (standard definition) satellite pay TV channels and 92 HD (high definition) satellite Pay TV channels.

25. Since the introduction of DTH Sector in the year 2003, Indian DTH (direct-to-home) services have displayed a phenomenal growth. During the QE 31st March 2021, there were 4 pay DTH service providers in the country.

26. Pay DTH has attained total active subscriber base of around 69.57 million in QE 31st March 2021. This is in addition the subscribers of DTH Free Dish (free DTH services of Doordarshan).

27. Apart from the radio stations operated by All India Radio – the public broadcaster, as on 31st March 2021, there are 366 operational private FM Radio stations in 105 cities with operational 30 Private FM Radio broadcasters.

28. The reported advertisement revenue during the quarter ending 31st March 2021 in respect of 365 private FM Radio stations is Rs.321.52 crore as against Rs.323.01 crore in respect of 366 private FM Radio stations for the previous quarter.

29. As per data received from MIB, as on 31st March 2021, 324 Community Radio Stations are operational in the country.

SNAPSHOT

(Data as on Q.E. 31st March, 2021)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,201.20 Million
% change over the previous quarter	2.33%
Urban Subscribers	663.77 Million
Rural Subscribers	537.42 Million
Market share of Private Operators	89.05%
Market share of PSU Operators	10.95%
Tele-density	88.17%
Urban Tele-density	141.03%
Rural Tele-density	60.27%
Wireless Subscribers	
Total Wireless Subscribers	1,180.96 Million
% change over the previous quarter	2.36%
Urban Subscribers	645.20 Million
Rural Subscribers	535.75 Million
Market share of Private Operators	89.68%
Market share of PSU Operators	10.32%
Tele-density	86.68%
Urban Tele-density	137.08%
Rural Tele-density	60.08%
Total Wireless Data Usage during the quarter	27,799 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	64,175
Number of Very Small Aperture Terminals (VSAT)	2,93,632
Wireline Subscribers	
Total Wireline Subscribers	20.24 Million
% change over the previous quarter	0.94%
Urban Subscribers	18.57 Million
Rural Subscribers	1.67 Million
Market share of PSU Operators	47.20%
Market share of Private Operators	52.80%
Tele-density	1.49%
Rural Tele-density	0.19%
Urban Tele-density	3.95%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	126,108

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs.66,784 Crore
% change in GR over the previous quarter	-6.71%
Adjusted Gross Revenue (AGR) during the quarter	Rs.48,587 Crore
% change in AGR over the previous quarter	2.03%
Share of Public sector undertakings in Access AGR	5.93%
Internet/Broadband Subscribers	
Total Internet Subscribers	825.30 Million
% change over previous quarter	3.79%
Narrowband subscribers	47.21 Million
Broadband subscribers	778.09 Million
Wired Internet Subscribers	25.99 Million
Wireless Internet Subscribers	799.30 Million
Urban Internet Subscribers	502.53 Million
Rural Internet Subscribers	322.77 Million
Total Internet Subscribers per 100 population	60.73
Urban Internet Subscribers per 100 population	107.30
Rural Internet Subscribers per 100 population	36.24
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	901
Number of Pay TV Channels as reported by broadcasters	327
Number of private FM Radio Stations (excluding All India Radio)	366
Number of total active subscribers with pay DTH operators	69.57 Million
Number of Operational Community Radio Stations	324
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.103.58
Minutes of Usage (MOU) per subscriber per month - Wireless Service	818 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	174.89 Million
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	12.33 GB
Average revenue realization per subscriber per GB wireless data during the quarter	Rs.10.77