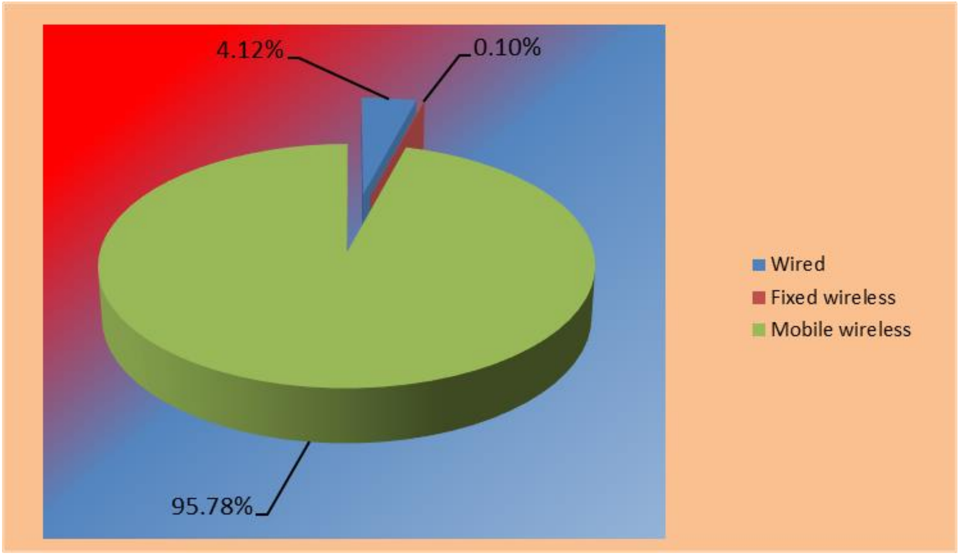
The Indian Telecom Services Performance Indicators
October–December 2023

Executive Summary

1. Total number of Internet subscribers increased from 918.19 million at the end of Sep-23 to 936.16 million at the end of Dec-23, registering a quarterly rate of growth 1.96%. Out of 936.16 million internet subscribers, number of Wired Internet subscribers are 38.57 million and number of Wireless Internet subscribers are 897.59 million.

Composition of internet subscription



2. The Internet subscriber base is comprised of Broadband Internet subscriber base of 904.54 million and Narrowband Internet subscriber base of 31.62 million.

3. The broadband Internet subscriber base increased by 2.21% from 885 million at the end of Sep-23 to 904.54 million at the end of Dec-23. The narrowband Internet subscriber base decreased from 33.19 million at the end of Sep-23 to 31.62 million at the end of Dec-23.

4. Wireline subscribers increased from 30.98 million at the end of Sep-23 to 31.84 million at the end of Dec-23 with a quarterly rate of growth 2.79% and, on Y-O-Y basis, wireline subscriptions also increased by 15.98% at the end of QE Dec-23.

5. Wireline Tele-density increased from 2.22% at the end of Sep-23 to 2.28% at the end of Dec-23 with quarterly rate of growth 2.56%.

6. Monthly Average Revenue per User (ARPU) for wireless service increased by 1.93%, from Rs.149.66 in QE Sep-23 to Rs.152.55 in QE Dec-23. On Y-O-Y basis, monthly ARPU for wireless service increased by 8.09% in this quarter.

7. Prepaid ARPU per month increased from Rs.148 in QE Sep-23 to Rs.149.56 in QE Dec-23 and Postpaid ARPU per month also increased from Rs.167.93 in QE Sep-23 to Rs.189.08 in QE Dec-23.

8. On an all-India average, the overall MOU per subscriber per month increased by 0.71% from 948 in Q.E. Sep-2023 to 955 in Q.E. Dec-2023.

9. Prepaid MOU per subscriber is 989 and Postpaid MOU per subscriber per month is 536 in QE Dec-23.

Revenue (AGR) of Telecom Service Sector for the Q.E. Dec-23 has been Rs.84,500 Crore, Rs.81,101 crore and Rs.67,835 Crore respectively. GR increased by 2.13%, ApGR increased by 1.70% and AGR increased by 1.88% in Q.E. Dec-23, as compared to previous quarter.

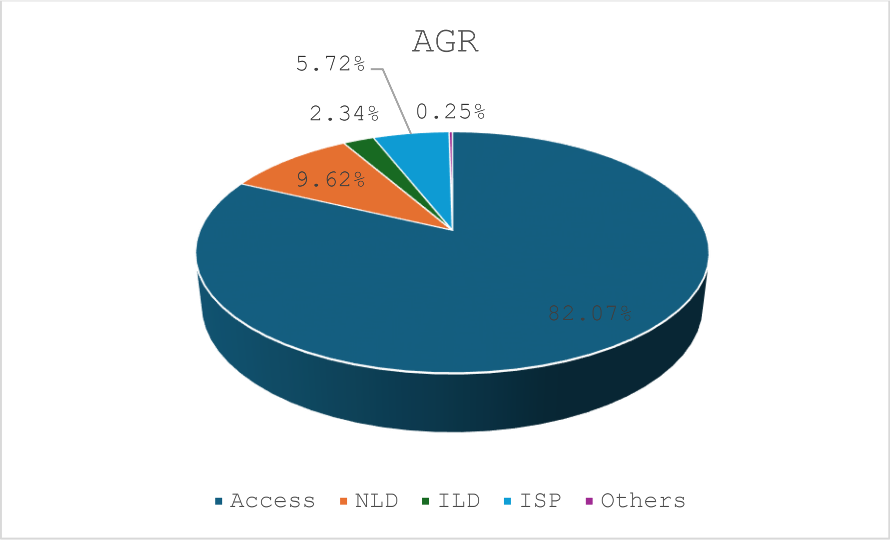
11. The Y-O-Y rate of growth in GR, ApGR and AGR in Q.E. Dec-23 over the same quarter in last year has been -4.16%, 5.84% and 7.84% respectively.

12. Pass Through Charges increased from Rs.13,425 Crore in QE Sep-23 to Rs.13,452 Crore in QE Dec-23 with quarterly rate of growth by 0.21%. The

Y-O-Y rate of decline 6.46% has been recorded in pass-through charges for QE Dec-23.

13. The License Fee increased from Rs.5,326 Crore for the QE Sep-23 to Rs.5,433 Crore for the QE Dec-23. The quarterly and the Y-O-Y rates of growth in license fees are 2.01% and 7.98% respectively in this quarter.

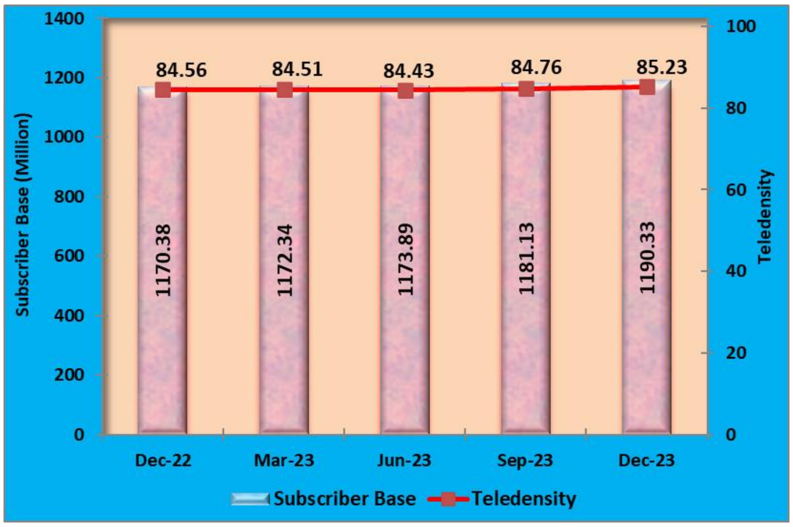
Service-wise composition of Adjusted Gross Revenue



14. Access services contributed 82.07% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Applicable Gross Usage Charges (SUC) and Pass Through Charges increased by 2.47%, 2.53%, 2.38%, 2.37%, 1.11% and 1.78% respectively in QE Dec-23.

15. The number of telephone subscribers in India increased from 1,181.13 million at the end of Sep-23 to 1,190.33 million at the end of Dec-23, registering a rate of growth 0.78% over the previous quarter. This reflects Year-On-Year (Y-O-Y) rate of growth 1.70% over the same quarter of the last year. The overall Tele-density in India increased from 84.76% as in QE Sep-23 to 85.23% as in QE Dec-23.

Trends in Telephone subscribers and Tele-density in India

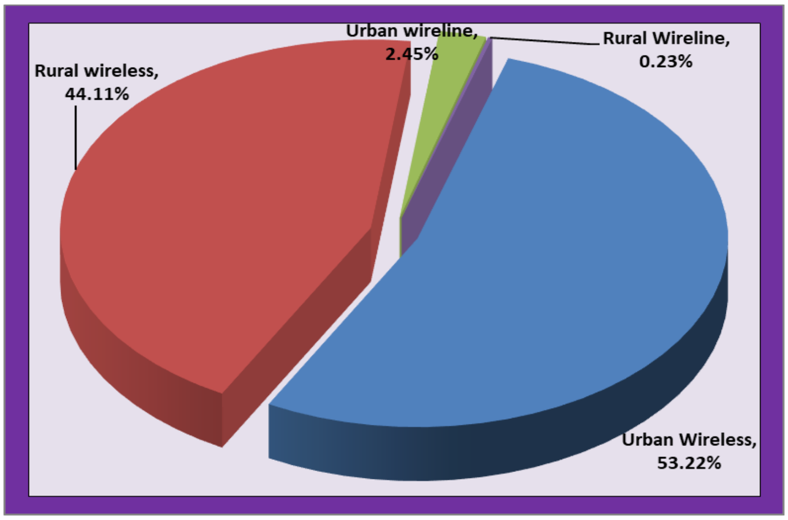


16. Telephone subscribers in Urban areas increased from 658.46 million at the end of Sep-23 to 662.56 million at the end of Dec-23 and Urban Tele-density also increased from 133.54% to 133.76% during the same period.

17. Rural telephone subscribers increased from 522.66 million at the end of Sep-23 to 527.77 million at the end of Dec-23 and Rural Tele-density also increased from 58.05% to 58.56% during the same period.

18. Out of the total subscription, the share of Rural subscription increased from 44.25% at the end of Sep-23 to 44.34% at the end of Dec-23.

Composition of Telephone Subscribers



19. With a net increase of 8.34 million subscribers during the quarter, the total wireless subscriber base increased from 1,150.15 million at the end of Sep-23 to 1,158.49 million at the end of Dec-23, registering a rate of growth

0.72% over the previous quarter. On Y-O-Y basis, wireless subscriptions also increased at the rate of 1.36% during the year.

20. Wireless Tele-density increased from 82.54% at the end of Sep-23 to 82.95% at the end of Dec-23 with quarterly rate of growth 0.50%.

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 deterioration, 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. 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 BSs 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)

24. The following parameters have shown improvement, as compared to the previous quarter, in QoS by Cellular Mobile service providers: -

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

25. A total of approximately 920 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/both uplinking & downlinking.

26. As per the reporting done by broadcasters in pursuance of the Tariff Order dated 3rd March 2017, as amended, out of 910 permitted satellite TV

channels which are available for downlinking in India, there are 363 satellite pay TV channels as on 31st December, 2023. Out of 363 pay channels, 259 are SD satellite pay TV channels and 104 are HD satellite pay TV channels.

27. 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 December 2023, there were 4 pay DTH service providers in the country.

28. Pay DTH has attained total active subscriber base of around 63.52 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 64.18 million in QE September 2023 to 63.52 million in QE December 2023.

29. 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 31st December 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.

30. The advertisement revenue reported by FM Radio operators during the quarter ending 31st December 2023 in respect of 388 private FM Radio channels is Rs.485.47 crore as against Rs.408.37 crore in respect of 388 private FM Radio channels for the previous quarter.

31. As on 31st December, 2023, 479 Community Radio stations are operational.

SNAPSHOT

(Data as on Q.E. 31st December, 2023)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,190.33 Million
% change over the previous quarter	0.78%
Urban Subscribers	662.56 Million
Rural Subscribers	527.77 Million
Market share of Private Operators	91.36%
Market share of PSU Operators	8.64%
Tele-density	85.23%
Urban Tele-density	133.76%
Rural Tele-density	58.56%
Wireless Subscribers	
Total Wireless Subscribers	1,158.49 Million
% change over the previous quarter	0.72%
Urban Subscribers	633.44 Million
Rural Subscribers	525.05 Million
Market share of Private Operators	91.90%
Market share of PSU Operators	8.10%
Tele-density	82.95%
Urban Tele-density	127.88%
Rural Tele-density	58.26%
Total Wireless Data Usage during the quarter	49,543 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	66,149
Number of Very Small Aperture Terminals (VSAT)	2,53,530
Wireline Subscribers	
Total Wireline Subscribers	31.84 Million
% change over the previous quarter	2.79%
Urban Subscribers	29.12 Million
Rural Subscribers	2.72 Million
Market share of PSU Operators	28.27%
Market share of Private Operators	71.73%
Tele-density	2.28%
Rural Tele-density	0.30%
Urban Tele-density	5.88%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	26,692

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs. 84,500 Crore
% change in GR over the previous quarter	2.13%
Applicable Gross Revenue (ApGR) during quarter	Rs. 81,101 Crore
% change in ApGR over the previous quarter	1.70%
Adjusted Gross Revenue (AGR) during the quarter	Rs. 67,835 Crore
% change in AGR over the previous quarter	1.88%
Share of Public sector undertakings in Access AGR	3.87%
Internet/Broadband Subscribers	
Total Internet Subscribers	936.16 Million
% change over previous quarter	1.96%
Narrowband subscribers	31.62 Million
Broadband subscribers	904.54 Million
Wired Internet Subscribers	38.57 Million
Wireless Internet Subscribers	897.59 Million
Urban Internet Subscribers	548.12 Million
Rural Internet Subscribers	388.05 Million
Total Internet Subscribers per 100 population	67.03
Urban Internet Subscribers per 100 population	110.66
Rural Internet Subscribers per 100 population	43.06
Total Outgoing Minutes of Usage for Internet Telephony	94.73 Million
No. of Public Wi-Fi Hotspots	1,65,163
Aggregate Data Consumed (GB)	50,00,047
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	920
Number of Pay TV Channels as reported by broadcasters	363
Number of private FM Radio Stations (excluding All India Radio)	388
Number of total active subscribers with pay DTH operators	63.52 Million
Number of Operational Community Radio Stations	479
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.152.55
Minutes of Usage (MOU) per subscriber per month - Wireless Service	955 Minutes
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	19.47 GB
Average revenue realization per GB for wireless data usage during the quarter	Rs.9.13