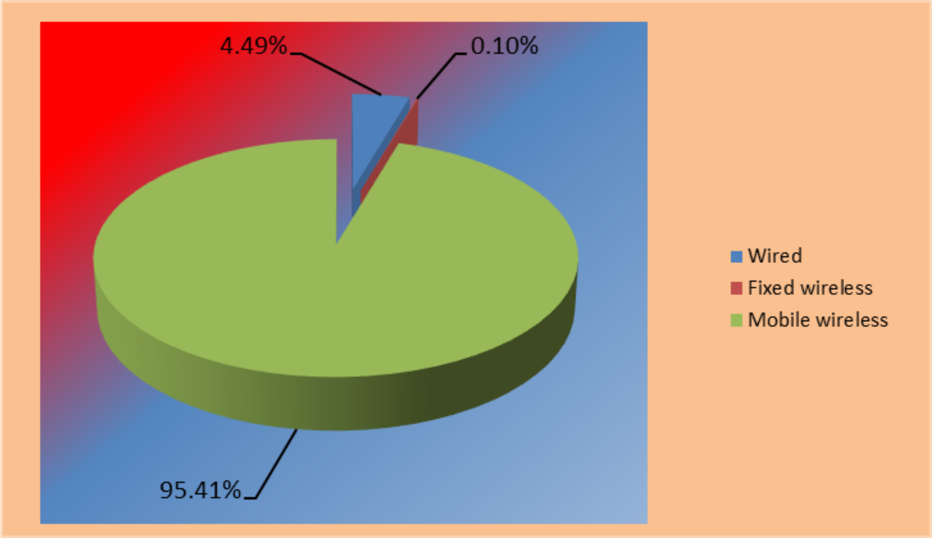
The Indian Telecom Services Performance Indicators

July–September, 2024

Executive Summary

1. Total number of Internet subscribers increased from 969.60 million at the end of Jun-24 to 971.50 million at the end of Sep-24, registering a quarterly rate of growth 0.20%. Out of 971.50 million internet subscribers, number of Wired Internet subscribers are 43.64 million and number of Wireless Internet subscribers are 927.86 million.

Composition of internet subscription



2. The Internet subscriber base is comprised of Broadband Internet subscriber base of 944.39 million and Narrowband Internet subscriber base of 27.11 million.

3. The broadband Internet subscriber base increased by 0.39% from 940.75 million at the end of Jun-24 to 944.39 million at the end of Sep-24. The narrowband Internet subscriber base decreasedfrom28.85 million at the end of Jun-24 to 27.11 million at the end of Sep-24.

4. Wireline subscribers increased from 35.11 million at the end of Jun-24 to 36.93 million at the end of Sep-24 with a quarterly rate of growth 5.20% and, on Y-O-Y basis, wireline subscriptions also increased by 19.22% at the end of QE Sep-24.

5. Wireline Tele-density increased from 2.50% at the end of Jun-24 to 2.63% at the end of Sep-24 with quarterly rate of growth 4.96%.

6. Monthly Average Revenue per User (ARPU) for wireless service increased by 9.60%, from Rs.157.45 in QE Jun-24 to Rs.172.57 in QE Sep-24. On Y-O-Y basis, monthly ARPU for wireless service increased by 15.31% in this quarter.

7. The ARPU per month for the pre-paid segment is Rs.171 and for the post-paid segment is Rs.190.67 in Q.E. Sep-2024.

8. On an all-India average, there is no change in overall MOU per subscriber per month and is the same 974 in QE Sep-2024 which was in Q.E. Jun-2024.

9. Prepaid MOU per subscriber is 1012and Postpaid MOU per subscriber per month is 534 in QE Sep-24.

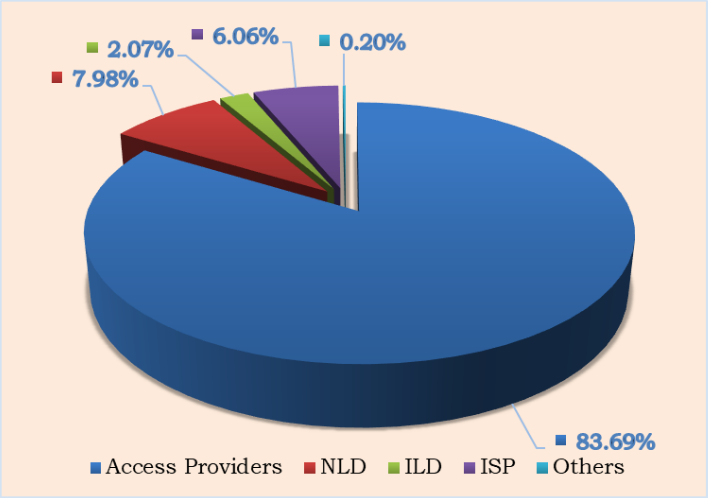
10. Gross Revenue (GR), Applicable Gross Revenue (ApGR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the Q.E. Sep-24 has been Rs.91,426 Crore, Rs.88,236 crore and Rs.75,310 Crore respectively. GR increased by 6.27%, ApGR increased by 6.20% and AGR increased by 6.74% in Q.E. Sep-24, as compared to previous quarter.

11. The Y-O-Y rate of growth in GR, ApGR and AGR in Q.E. Sep-24 over the same quarter in last year has been 10.50%, 10.64% and 13.11% respectively.

12. Pass Through Charges increased from Rs.12,561 Crore in QE Jun-24 to Rs.12,926 Crore in QE Sep-24 with quarterly rate of growth by 2.91%. The Y-O-Y rate of decline 3.71% has been recorded in pass-through charges for QE Sep-24.

13. The License Fee increased from Rs.5,645 Crore for the QE Jun-24 to Rs.6,023 Crore for the QE Sep-24. The quarterly and the Y-O-Y rates of growth in license fees are 6.69% and 13.09% respectively in this quarter.

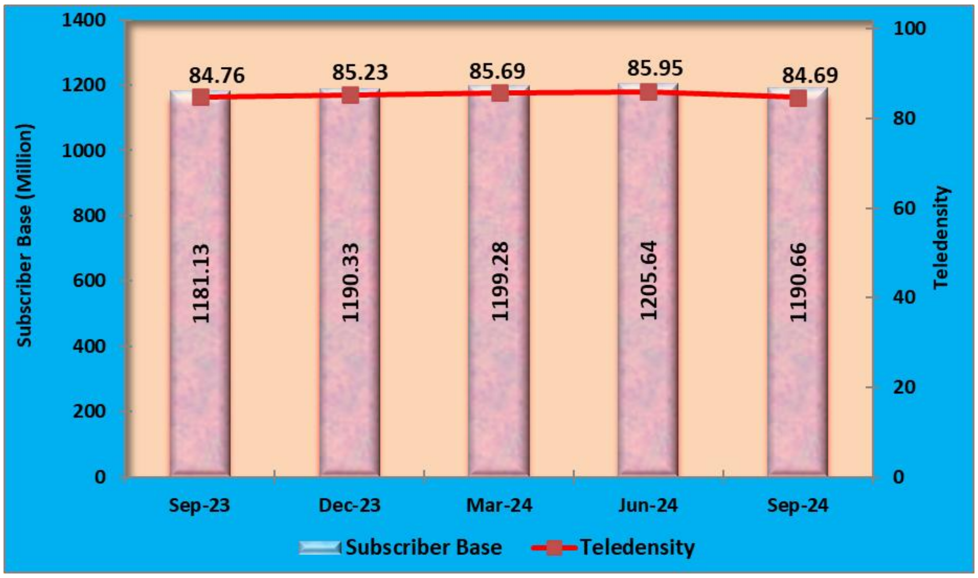
Service-wise composition of Adjusted Gross Revenue



14. Access services contributed 83.69% of the total Adjusted Gross Revenue of telecom services. In Access services, Gross Revenue (GR), Applicable Gross Revenue (ApGR), Adjusted Gross Revenue (AGR), License Fee, Spectrum Usage Charges (SUC) and Pass Through Charges increased by 8.21%, 7.31%, 8.41%, 8.43%, 8.50% and 0.71% respectively in QE Sep-24.

15. The number of telephone subscribers in India decreased from 1,205.64 million at the end of Jun-24 to 1,190.66 million at the end of Sep-24, registering a rate of decline1.24% over the previous quarter. This reflects Year-On-Year (Y-O-Y) rate of growth 0.81% over the same quarter of the last year. The overall Tele-density in India decreased from 85.95% as in QE Jun-24 to 84.69% as in QE Sep-24.

Trends in Telephone subscribers and Tele-density in India

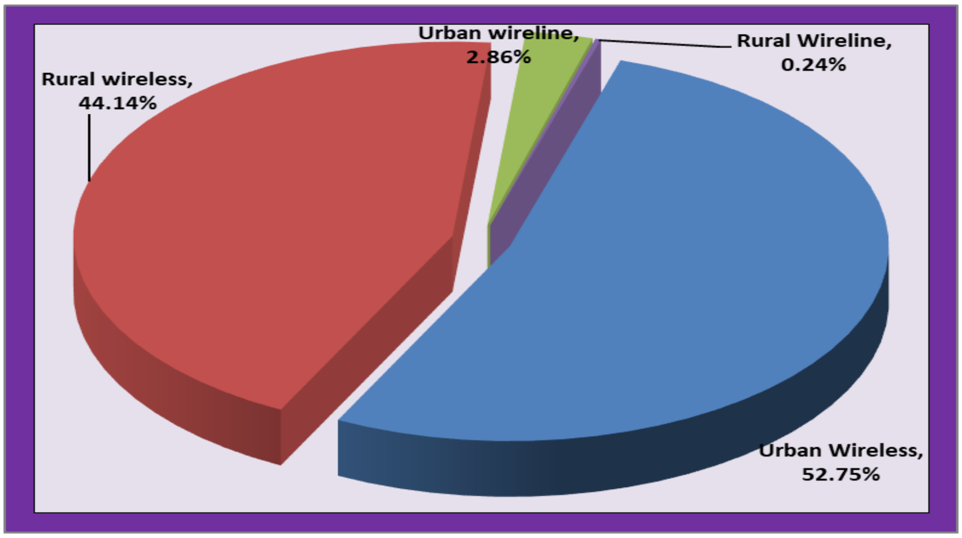


16. Telephone subscribers in Urban areas decreased from 667.13 million at the endof Jun-24 to 662.15 million at the endof Sep-24 and Urban Tele-density also decreased from 133.46% to 131.86% during the same period.

17. Rural telephone subscribers decreased from 538.51 million at the end of Jun-24 to 528.51 million at the end of Sep-24 and Rural Tele-density also decreased from 59.65% to 58.48% during the same period.

18. Out of the total subscription, the share of Rural subscription decreased from 44.67% at the end of Jun-24 to 44.39% at the end of Sep-24.

Composition of Telephone Subscribers



19. With a net loss of 16.80 million subscribers during the quarter, the total wireless subscriber base decreased from 1,170.53 million at the end of Jun-24 to 1,53.72 million at the end of Sep-24, registering a rate of

decline1.44% over the previous quarter. On Y-O-Y basis, wireless subscriptionsincreased at the rate of 0.31% during the year.

20. Wireless Tele-density decreased from 83.45% at the end of Jun-24 to 82.07% at the end of Sep-24 with quarterly rate of decline of 1.65%.

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. % Fault repaired by next working day (for rural and hilly areas) (≥ 75%)
iii. % Fault repaired within 7 days (for rural and hilly areas) (100%)
iv. Point of Interconnection (POI) Congestion (No. of PoIs not meeting benchmark) (≤ 0.5%)
v. Metering and billing credibility- post-paid (≤ 0.1%)
vi. Metering and billing credibility- pre-paid (≤ 0.1%)
vii. Resolution of billing/charging/credit & validity complaints within 4 weeks (98% within 4 weeks)
viii. Resolution of billing/charging/credit & validity complaints within 6 weeks (100% within 6 weeks)
ix. Period of applying credit/waiver/adjustment to customer's account from the date of resolution of complaints (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. % Fault repaired within 5 days (for urban areas) >=100%
ii. Accessibility of call centre/ customer care >=95%
iii. %age of calls answered by the operators (voice to voice) within ninety seconds >=95%

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. Call Set-up Success Rate and Session Establishment Success Rate for Circuit Switched Voice or VoLTE as applicable (within licensee's own network) ≥ 95%
ii. TCH, RAB and E-RAB Congestion (%age) <=2%
iii. Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] ≤ 3%
iv. Connections with good voice quality, Circuit Switched Voice Quality and VoLTE quality ≥ 95%
v. Down Link (DL) Packet Drop Rate or DL-PDR ≤ 2%
vi. Up Link (UL) Packet Drop Rate or UL-PDR ≤ 2%
vii. Point of Interconnection (POI) Congestion (No. of POIs not meeting the benchmark) ≤ 0.5%
viii. Metering and billing credibility - postpaid ≤ 0.1%
ix. Metering and billing credibility – prepaid ≤ 0.1%
x. Resolution of billing/charging/validity complaints - 98% within 4 weeks
xi. Resolution of billing/charging/validity complaints - 100% within 6 weeks
xii. Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution of complaints - 100% within 1 week of resolution of complaint
xiii. Termination / Closure of service ≤ 7 days
xiv. 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. SDCCH/ Paging Channel Congestion/ RRC Congestion (%age) <=1%
ii. TCH, RAB and E-RAB Congestion (%age) <=2%

iii. Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution of complaints - 100% within 1 week of resolution of complaint

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

i. Network QoS DCR Spatial Distribution Measure [Network_ QSD(90,90)] <=2%

ii. Accessibility of call centre/customer care => 95%

iii. Percentage of calls answered by the operators (voice to voice) within ninety seconds => 95%

26. A total of approximately 912 private satellite TV channels have been permitted by the Ministry of Information and Broadcasting (MIB) for uplinking only/downlinking only/both uplinking& downlinking.

27. As per the reporting done by broadcasters in pursuance of the Tariff Order dated 3rdMarch 2017, as amended, out of 902 permitted satellite TV channels which are available for downlinking in India, there are 362 satellite pay TV channels as on 30th September, 2024. Out of 362 pay channels, 258 are SD satellite pay TV channels and 104 are HD satellite pay TV channels.

28. During the QE 30th September 2024, there were 4 pay DTH service providers in the country.

29. Pay DTH has attained total active subscriber base of around 59.91 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 62.17 million in June, 2024 to 59.91 million in September 2024.

30. 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 30th September 2024, 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.

31. The advertisement revenue reported by FM Radio operators during the quarter ending 30th September 2024 in respect of 388 private FM Radio channels is Rs.423.52 crore as against Rs.428.45 crore in respect of 388 private FM Radio channels for the previous quarter.

32. As on 30th September, 2024, 513 Community Radio stations are operational.

SNAPSHOT

(Data as on Q.E. 30th September, 2024)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,190.66 Million
% change over the previous quarter	-1.24%
Urban Subscribers	662.15 Million
Rural Subscribers	528.51 Million
Market share of Private Operators	91.36%
Market share of PSU Operators	8.64%
Tele-density	84.69%
Urban Tele-density	131.86%
Rural Tele-density	58.48%
Wireless Subscribers	
Total Wireless Subscribers	1,153.72 Million
% change over the previous quarter	-1.44%
Urban Subscribers	628.12 Million
Rural Subscribers	525.60 Million
Market share of Private Operators	91.85%
Market share of PSU Operators	8.15%
Tele-density	82.07%
Urban Tele-density	125.08%
Rural Tele-density	58.16%
Total Wireless Data Usage during the quarter	56,174 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	66,066
Number of Very Small Aperture Terminals (VSAT)	2,52,183
Wireline Subscribers	
Total Wireline Subscribers	36.93 Million
% change over the previous quarter	5.20%
Urban Subscribers	34.03 Million
Rural Subscribers	2.90 Million
Market share of PSU Operators	23.95%
Market share of Private Operators	76.05%
Tele-density	2.63%
Rural Tele-density	0.32%
Urban Tele-density	6.78%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	15,374

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs.91,426/- crore
% change in GR over the previous quarter	6.27%
Applicable Gross Revenue (ApGR) during quarter	Rs.88,236/- crore
% change in ApGR over the previous quarter	6.20%
Adjusted Gross Revenue (AGR) during the quarter	Rs.75,310/- crore
% change in AGR over the previous quarter	6.74%
Share of Public sector undertakings in Access AGR	3.41%
Internet/Broadband Subscribers	
Total Internet Subscribers	971.50 Million
% change over previous quarter	0.20%
Narrowband subscribers	27.11 Million
Broadband subscribers	944.39 Million
Wired Internet Subscribers	43.64 Million
Wireless Internet Subscribers	927.86 Million
Urban Internet Subscribers	566.16 Million
Rural Internet Subscribers	405.33 Million
Total Internet Subscribers per 100 population	69.10
Urban Internet Subscribers per 100 population	112.74
Rural Internet Subscribers per 100 population	44.85
Total Outgoing Minutes of Usage for Internet Telephony	84.21 Million
No. of Public Wi-Fi Hotspots	1,64,803
Aggregate Data Consumed (TB) for Wi-Fi Hotspots	18,431
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	912
Number of Pay TV Channels as reported by broadcasters	362
Number of private FM Radio Stations (excluding All India Radio)	388
Number of total active subscribers with pay DTH operators	59.91 Million
Number of Operational Community Radio Stations	513
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.172.57
Minutes of Usage (MOU) per subscriber per month - Wireless Service	974
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	21.10 GB
Average revenue realization per GB for wireless data usage during the quarter	Rs.9.08