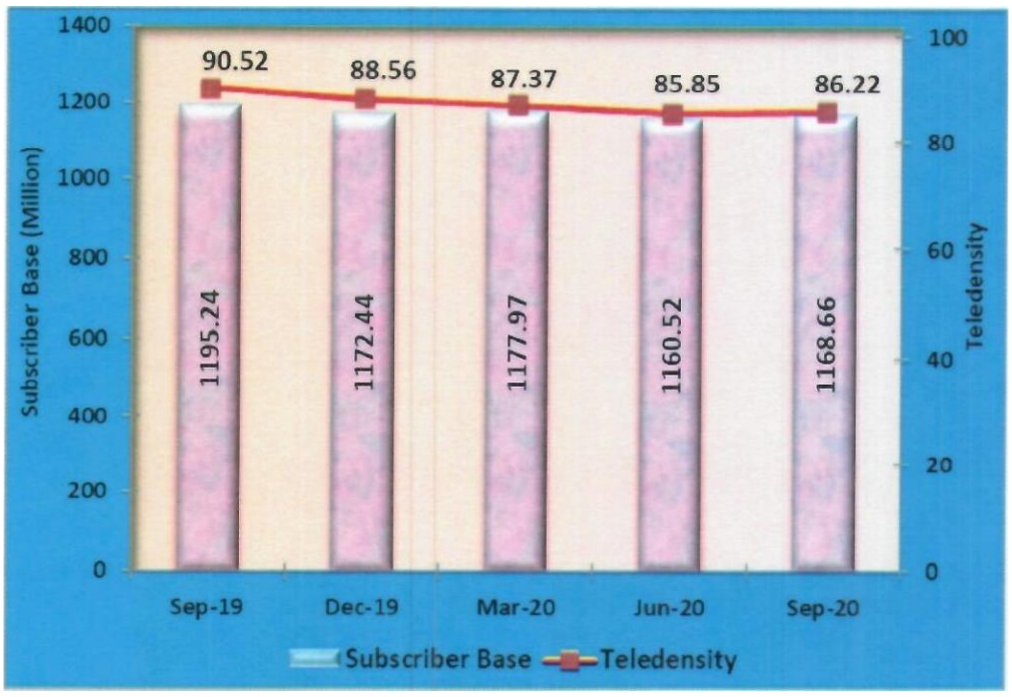
The Indian Telecom Services Performance Indicators July — September, 2020

Executive Summary

1. The number of telephone subscribers in India increased from 1,160.52 million at the end of Jun-20 to 1, 168.66 million at the end of Sep-20, registering a growth rate of 0.70% over the previous quarter. This reflects Year-On-Year (Y-O-Y) decline rate of 2.22% over the same quarter of the last year. The overall Tele-density in India also increased from 85.85% as in QE Jun-20 to 86.22% as in QE Sep-20.

Trends in Telephone subscribers and Tele-density in India

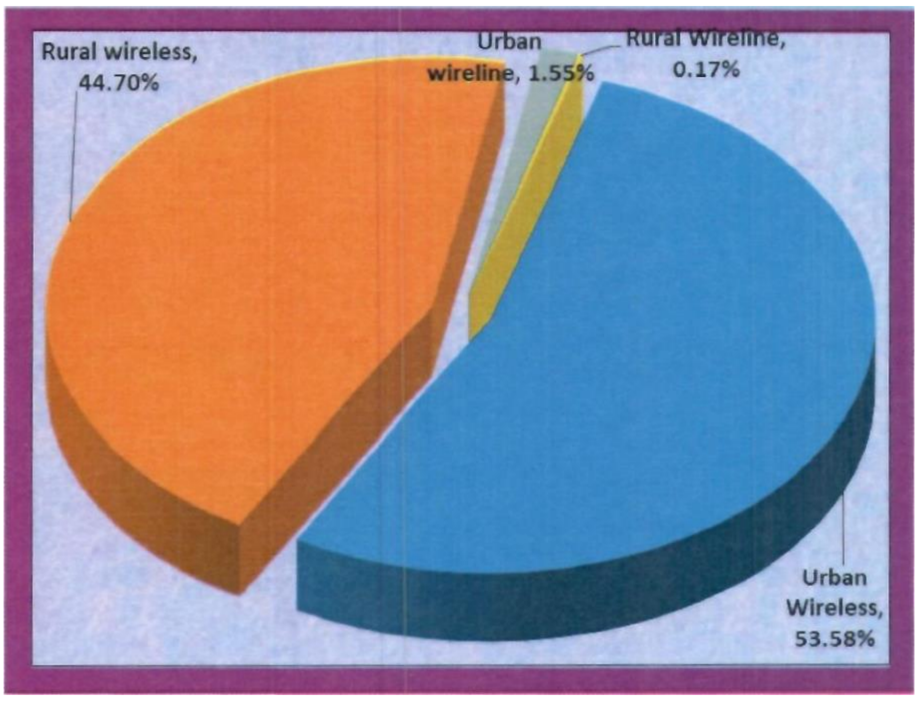


2. Telephone subscribers in Urban areas increased from 636.83 million at the end of Jun-20 to 644.26 million at the end of Sep-20 and Urban Tele-density also increased from 137.35% to 138.25% during the same period.

3. Rural telephone subscribers increased from 523.69 million at the end of Jun-20 to 524.39 million at the end of Sep-20 however, Rural Teledensity remained same i.e. 58.96%, as it was during last quarter June, 2020.

4. Out of the total subscription, the share of Rural subscription decreased from 45.13% at the end of Jun-20 to 44.87% at the end of Sep-20.

Composition of Telephone Subscribers



5. With a net increase of 7.88 million subscribers during the quarter, the total wireless subscriber base increased from 1, 140.71 million at the end of Jun-20 to 1, 148.58 million at the end of Sep-20, registering a growth rate of 0.69% over the previous quarter. However, wireless subscriptions declined on Y-O-Y basis at the rate of 2.14% during the year.

ofll

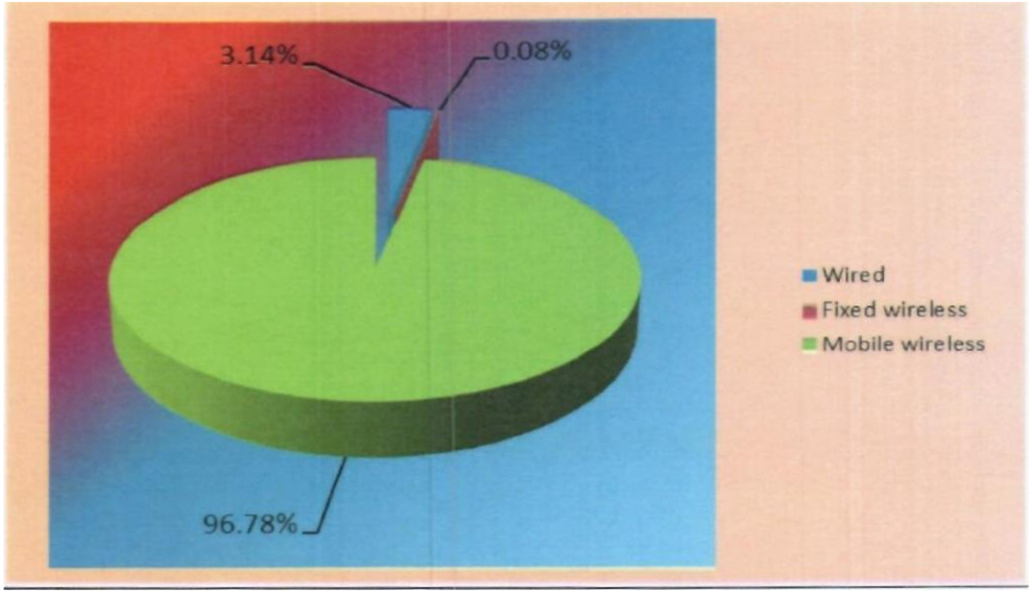
6. Wireless Tele-density increased from 84.38% at the end of Jun-20 to 84.74% at the end of Sep-20 with quarterly growth rate of 0.43%.

7. Wireline subscribers increased from 19.81 million at the end of Jun-20 to 20.08 million at the end of Sep-20 with a quarterly growth rate of 1.34% however, on Y-O-Y basis, wireline subscriptions declined by 6.58% at the end of QE Sep-20.

8. Wireline Tele-density increased from 1.47% at the end of Jun-20 to 1.48% at the end of Sep-20.

9. Total number of Internet [1] subscribers increased from 749.07 million at the end of Jun-20 to 776.45 million at the end of Sep-20, registering a quarterly growth rate of 3.66%. Out of 776.45 million internet subscribers, number of Wired Internet subscribers are 24.36 million and number of Wireless Internet subscribers are 752.09 million.

Composition of internet eubsgription



[1] Internet: Interconnected global networks that use the internet protocol.

10. The Internet subscriber base is comprised of Broadband[2] Internet subscriber base of 726.32 million and Narrowband3 Internet subscriber base of 50.14 million.

11. The broadband Internet subscriber base increased by 4.02% from 698.23 million at the end of Jun-20 to 726.32 million at the end of Sep-20. However, the narrowband Internet subscriber base declined by 1.38% from 50.84 million at the end of Jun-20 to 50.14 million at the end of Sep-20.

12. Monthly Average Revenue per User (ARPU) [4] for wireless service increased by 7.49%, from 00.12 in QE Jun-20 to 06.87 in QE Sep20. On Y-O-Y basis, monthly ARPU for wireless service increased by 30.24% in this quarter.

13. Prepaid ARPU per month increased from 04 for QE Jun-20 to ?90 in QE Sep-20 and Postpaid ARPU per month also increased from 024 in QE Jun-20 to (234 in QE Sep-20.

14. On all India average, the overall Minutes of Usage (MOU) [5] per subscriber per month for wireless service increased by 2.37% from 744 in QE Jun-20 to 761 in QE Sep-20.

15. Prepaid MOU per subscriber per month increased from 748 in QE Jun-20 to 765 in QE Sep-20, Postpaid MOU per subscriber per month also increased from 648 in QE Jun-20 to 680 in QE Sep-20.

- 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 Kbiüs in one or both directions.

(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,

16. Gross Revenue[6] (GR) and Adjusted Gross Revenue[7] (AGR) of Telecom Service Sector for the Q.E. Sep-20 has been G8,228 Crore and u5,707 Crore respectively. GR and AGR increased by 2.05% and 3.58% respectively in Q. E. Sep-20 as compared to previous quarter.

17. The Y-O-Y growth in GR and AGR in Q.E. Sep-20 over the same quarter in last year has been 13.73% and 22.41% respectively.

18. Pass-through[8] charges decreased from 02, 730 Crore in QE Jun-20 to 02,521 Crore in QE Sep-20 with quarterly decline rate of 0.92%. The Y-O-Y growth rate of -0.58% has been recorded in pass-through charges for QE Sep-20.

19. The License Fee[9] increased from (3,526 Crore for the QE Jun-20 to 0,656 Crore for the QE Sep-20. The quarterly and the Y-O-Y growth rates of license fee are 3.70% and 22.34% respectively in this quarter.

---

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;

Il. Roaming revenues actually passed on to other eligible/entitled telecommunication service providers; and

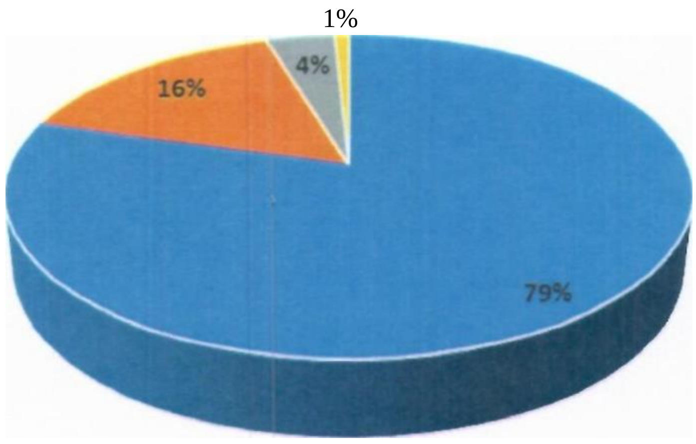
Ill. Service Tax on provision of service and Sales Tax actually paid to the Government if gross revenue had included as component of Sales Tax and Service Tax

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

AGR



• Access • NLC) • ILO Others

20. Access services contributed 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) [IO] increased by 3.30%, 5.80%, 5.81% and 5.98% respectively in QE Sep-20. However, Pass Through Charges decreased quarterly by 2.35% during the same period.

21. Monthly Average Revenue per User (ARPU) for Access Services based on AGR, increased from 08.01 in QE Jun-20 to 003.87 in QE sep20.

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-a-vis that in the previous quarter is given below: -

Parameters showing improvement in QoS	Parameters showing deterioration in QoS
% Fault repaired by next working day (for urban areas) "Mean time to Repair" (MTTR) Metering and billing credibility post-paid, oage of calls answered by the operators (voice to voice) within 90 seconds Time taken for refund of deposits after closures	Accessibility of call centre/ customer care %age of request for Termination / closure of service complied within 7 days

23. The performance of Cellular Mobile service providers in terms of Quality of Service (QoS) during the quarter vis-ä-vis that in the previous quarter is given as below: -

Parameters showing improvement in QoS	Parameters showing deterioration in Qos
Network QoS DCR Temporal Distribution Measure [Network_ QTD (97,90)] Resolution of billing/ charging/ validity complaints 98% within 4 weeks Accessibility of call centre/ customer care 0 oage of calls answered by the operators (voice to voice) within 90 sec Time taken for refund of deposits after closures	Resolution of billing/ charging/ validity complaints 100% within 6 weeks Period of applying credit/ waiver/ adjustment to customer's account from the date of resolution of complaints 0 oage requests for Termination / Closure of service complied within 7 days

24. A total number of 911 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 30th sep, 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 327 pay channels as on 30th September 2020, which include 231 SD (standard definition) pay TV channels and 96 HD (high definition) Pay TV channels.

26. Since its introduction in the year 2003, DTH (direct-to-home) service has displayed phenomenal growth. During QE 30th September 2020, there were 4 pay DTH service providers in the country.

27. Pay DTH has attained total active subscriber base of around 70.70 million in QE 30th September 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 30th September 2020, there are 367 operational private FM Radio stations in 105 cities with operational 31 Private FM Radio broadcasters same as previous quarter.

29. The reported advertisement revenue during the quarter ending 30th September 2020 in respect of 366 private FM Radio stations is {198.53 crore as against 08.41 crore in respect of 366 private FM Radio stations for the previous quarter.

30. As per data received from MIB, as on 30th September 2020, 310 Community Radio Stations are operational in the country.

Snapshot

(Data as on Q.E. 30th September, 2020)	
Telecom Subscribers (Wireless+Wire1ine)	
Total Subscribers	1, 168.66 Million
% change over the previous quarter	0.70%
Urban Subscribers	644.26 Million

Rural Subscribers	524.39 Million
Market share of Private Operators	88.61%
Market share of PSU Operators	11.39%
Tele-density	86.22%
Urban Tele-density	138.25%
Rural Tele-density	58.96%
Wireless Subscribers	
Total Wireless Subscribers	1, 148.58 Million
% change over the previous quarter	0.69%
Urban Subscribers	626.16 Million
Rural Subscribers	522.42 Million
Market share of Private Operators	89.35%
Market share of PSU Operators	10.65%
Tele-density	84.74%
Urban Tele-density	134.37%
Rural Tele-density	58.74%
Total Wireless Data Usage during the quarter	25,227 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	63,901
Number of Very Small Aperture Terminals (VSAT)	2,95,261
Wireline Subscribers	
Total Wireline Subscribers	20.08 Million
% change over the previous quarter	1.34%
Urban Subscribers	18.10 Million
Rural Subscribers	1.98 Million
Market share of PSU Operators	53.65%
Market share of Private Operators	46.35%
Tele-density	1.48%
Rural Tele-density	0.22%
Urban Tele-density	3.88%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	1,55,182

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Crore
% change in GR over the previous quarter	2.05%
Adjusted Gross Revenue (AGR) during the quarter	Crore
% change in AGR over the previous quarter	3.58%

Share of Public sector undertakings in Access AGR	7.02%
Monthly Average Revenue Per User (ARPU) for Access Services	003.87
Internet/ Broadband Subscribers	
Total Internet Subscribers	776.45 Million
% change over previous quarter	3.66%
Narrowband subscribers	50.14 Million
Broadband subscribers	726.32 Million
Wired Internet Subscribers	24.36 Million
Wireless Internet Subscribers	752.09 Million
Urban Internet Subscribers	474.11 Million
Rural Internet Subscribers	302.35 Million
Total Internet Subscribers per 100 population	57.29
Urban Internet Subscribers per 100 population	101.74
Rural Internet Subscribers per 100 population	33.99
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	911
Number of Pay TV Channels as reported by broadcasters	327
Number of private FM Radio Stations (excluding All India Radio)	367
Number of total active subscribers with pay DTH operators	70.70 Million
Number of Operational Community Radio Stations	310
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	€96.87
Minutes of Usage (MOU) per subscriber per month - Wireless Service	761 Minutes
Total Outgoing Minutes of Usage for Internet Telephony	182.58 Million
Wireless Data Usage Average Wireless Data Usage per wireless data subscriber per month	11.96 GB
Average revenue realization per subscriber per GB wireless data during the quarter	< 10.95