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TELECOM REGULATORY AUTHORITY OF INDIA

New Delhi, the 4th July, 2024

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

"Indian Telecom Services Performance Indicator Report" for the Quarter January-March, 2024

TRAI today has released the **"Indian Telecom Services Performance Indicator Report"** for the Quarter ending 31st March, 2024. 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, 2024 to 31st March, 2024 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 and under the link http://www.trai.gov.in/release-publication/reports/performance-indicators-reports). Any suggestion or any clarification pertaining to this report, Shri Amit Sharma, Advisor (F&EA), TRAI may be contacted on Tel. +91-20907772 and e-mail: advfea2@trai.gov.in.

4/7/24

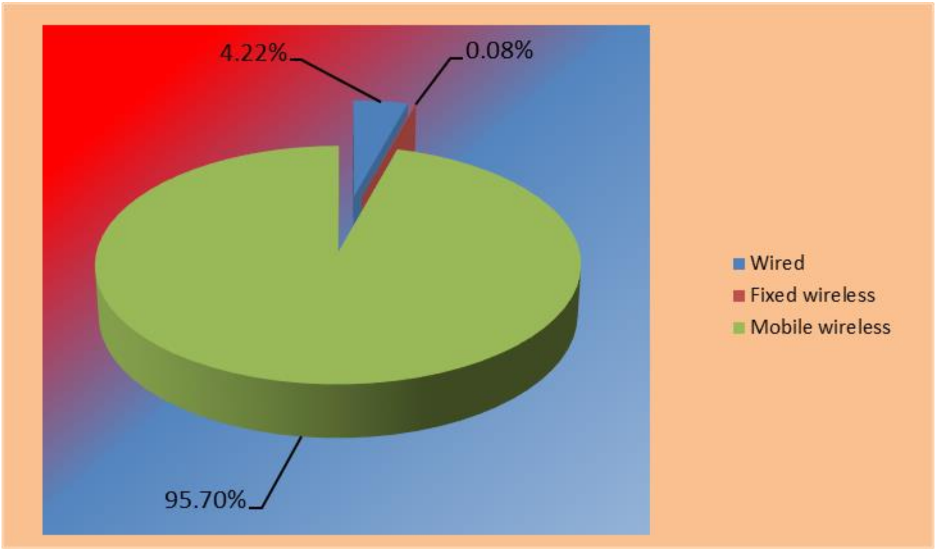
(Atul Kumar Chaudhary)
Secretary, TRAI

The Indian Telecom Services Performance Indicators
January–March, 2024

Executive Summary

1. Total number of Internet subscribers increased from 936.16 million at the end of Dec-23 to 954.40 million at the end of Mar-24, registering a quarterly rate of growth 1.95%. Out of 954.40 million internet subscribers, number of Wired Internet subscribers are 40.27 million and number of Wireless Internet subscribers are 914.13 million.

Composition of internet subscription



2. The Internet subscriber base is comprised of Broadband Internet subscriber base of 924.07 million and Narrowband Internet subscriber base of 30.34 million.

3. The broadband Internet subscriber base increased by 2.16% from 904.54 million at the end of Dec-23 to 924.07 million at the end of Mar-24. The narrowband Internet subscriber base decreased from 31.62 million at the end of Dec-23 to 30.34 million at the end of Mar-24.

4. Wireline subscribers increased from 31.84 million at the end of Dec-23 to 33.79 million at the end of Mar-24 with a quarterly rate of growth 6.12% and, on Y-O-Y basis, wireline subscriptions also increased by 18.94% at the end of QE Mar-24.

5. Wireline Tele-density increased from 2.28% at the end of Dec-23 to 2.41% at the end of Mar-24 with quarterly rate of growth 5.89%.

6. Monthly Average Revenue per User (ARPU) for wireless service increased by 0.64%, from Rs.152.55 in QE Dec-23 to Rs.153.54 in QE Mar-24. On Y-O-Y basis, monthly ARPU for wireless service increased by 7.88% in this quarter.

7. Prepaid ARPU per month increased from Rs.149.56 in QE Dec-23 to Rs.150.74 in QE Mar-24 however Postpaid ARPU per month decreased from Rs.189.08 in QE Dec-23 to Rs.187.85 in QE Mar-24.

8. On an all-India average, the overall MOU per subscriber per month increased by 4.21% from 955 in Q.E. Dec-2023 to 995 in Q.E. Mar-2024.

9. Prepaid MOU per subscriber is 1031 and Postpaid MOU per subscriber per month is 555 in QE Mar-24.

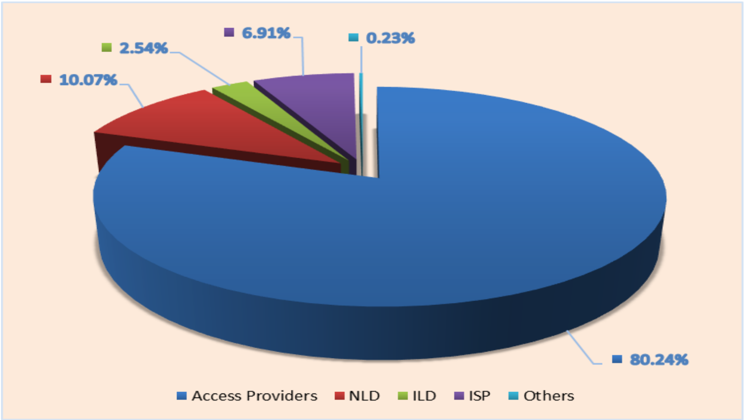
10. Gross Revenue (GR), Applicable Gross Revenue (ApGR) and Adjusted Gross Revenue (AGR) of Telecom Service Sector for the Q.E. Mar-24 have been Rs.87,926 Crore, Rs.83,945 crore and Rs.70,462 Crore respectively. GR increased by 4.05%, ApGR increased by 3.51% and AGR increased by 3.87% in Q.E. Mar-24, as compared to previous quarter.

11. The Y-O-Y rate of growth in GR, ApGR and AGR in Q.E. Mar-24 over the same quarter in last year has been 3.01%, 6.76% and 9.25% respectively.

12. Pass Through Charges increased from Rs.13,452 Crore in QE Dec-23 to Rs.13,482 Crore in QE Mar-24 with quarterly rate of growth by 0.22%. The Y-O-Y rate of decline 8.44% has been recorded in pass-through charges for QE Mar-24.

13. The License Fee increased from Rs.5,433 Crore for the QE Dec-23 to Rs.5,637 Crore for the QE Mar-24. The quarterly and the Y-O-Y rates of growth in license fees are 3.76% and 9.28% respectively in this quarter.

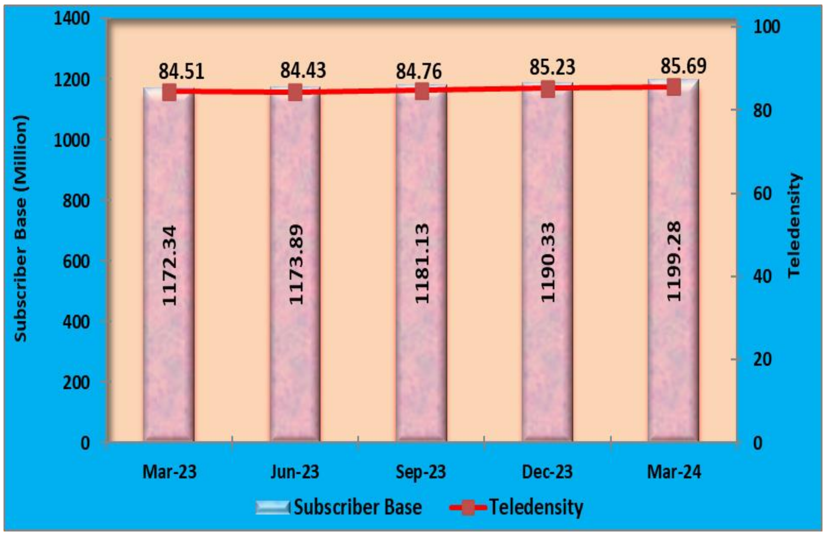
Service-wise composition of Adjusted Gross Revenue



14. Access services contributed 80.24% 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 3.44%, 1.51%, 1.56%, 1.58%, 2.83% and 1.25% respectively in QE Mar-24.

15. The number of telephone subscribers in India increased from 1,190.33 million at the end of Dec-23 to 1,199.28 million at the end of Mar-24, registering a rate of growth 0.75% over the previous quarter. This reflects Year-On-Year (Y-O-Y) rate of growth 2.30% over the same quarter of the last year. The overall Tele-density in India increased from 85.23% as in QE Dec-23 to 85.69% as in QE Mar-24.

Trends in Telephone subscribers and Tele-density in India

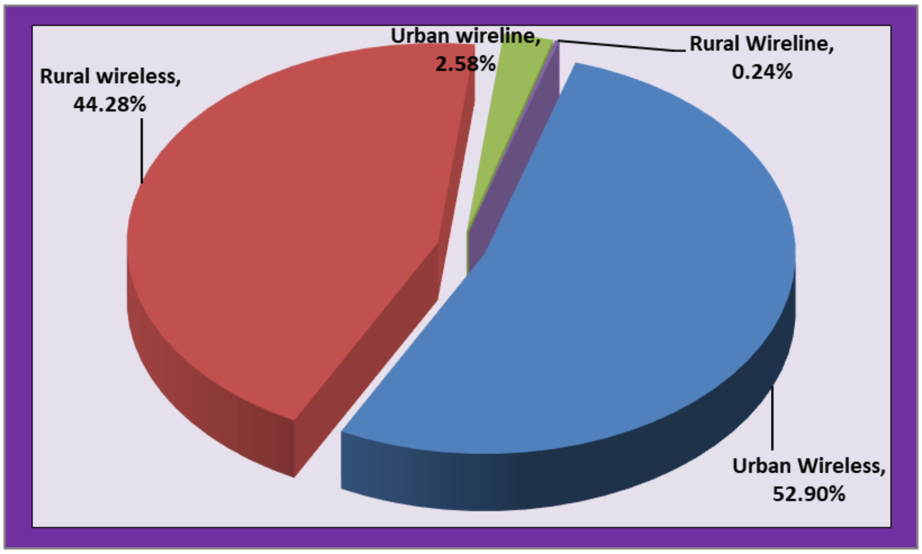


16. Telephone subscribers in Urban areas increased from 662.56 million at the end of Dec-23 to 665.38 million at the end of Mar-24 however Urban Tele-density decreased from 133.76% to 133.72% during the same period.

17. Rural telephone subscribers increased from 527.77 million at the end of Dec-23 to 533.90 million at the end of Mar-24 and Rural Tele-density also increased from 58.56% to 59.19% during the same period.

18. Out of the total subscription, the share of Rural subscription increased from 44.34% at the end of Dec-23 to 44.52% at the end of Mar-24.

Composition of Telephone Subscribers



19. With a net increase of 7 million subscribers during the quarter, the total wireless subscriber base increased from 1,158.49 million at the end of Dec-23 to 1,165.49 million at the end of Mar-24, registering a rate of growth 0.60% over the previous quarter. On Y-O-Y basis, wireless subscriptions also increased at the rate of 1.88% during the year.

20. Wireless Tele-density increased from 82.95% at the end of Dec-23 to 83.27% at the end of Mar-24 with quarterly rate of growth 0.38%.

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 improvement, as compared to the previous quarter, in QoS by wireline service providers: -

    i. % Fault repaired by next working day (for urban areas) ≥ 85%

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. Time taken for refund of deposits after closures 100% within 60 days

23. 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%

24. 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 BS 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)

25. The following parameters have shown deterioration, 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%

26. A total of approximately 922 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 3rd March 2017, as amended, out of 912 permitted satellite TV channels which are available for downlinking in India, there are 361 satellite pay TV channels as on 31st March, 2024. Out of 361 pay channels, 258 are SD satellite pay TV channels and 103 are HD satellite pay TV channels.

28. During the QE 31st March 2024, there were 4 pay DTH service providers in the country.

29. Pay DTH has attained total active subscriber base of around 61.97 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 63.52 million in December 2023 to 61.97 million in March 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 31st March 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 31st March 2024 in respect of 388 private FM Radio channels is Rs.491.98 crore as against Rs.485.47 crore in respect of 388 private FM Radio channels for the previous quarter.

32. As on 31st March, 2024, 494 Community Radio stations are operational.

SNAPSHOT

(Data as on Q.E. 31st March, 2024)	
Telecom Subscribers (Wireless+Wireline)	
Total Subscribers	1,199.28 Million
% change over the previous quarter	0.75%
Urban Subscribers	665.38 Million
Rural Subscribers	533.90 Million
Market share of Private Operators	91.70%
Market share of PSU Operators	8.30%
Tele-density	85.69%
Urban Tele-density	133.72%
Rural Tele-density	59.10%
Wireless Subscribers	
Total Wireless Subscribers	1,165.49 Million
% change over the previous quarter	0.60%
Urban Subscribers	634.47 Million
Rural Subscribers	531.02 Million
Market share of Private Operators	92.26%
Market share of PSU Operators	7.74%
Tele-density	83.27%
Urban Tele-density	127.51%
Rural Tele-density	58.87%
Total Wireless Data Usage during the quarter	52,636 PB
Number of Public Mobile Radio Trunk Services (PMRTS)	65,880
Number of Very Small Aperture Terminals (VSAT)	2,53,250
Wireline Subscribers	
Total Wireline Subscribers	33.79 Million
% change over the previous quarter	6.12%
Urban Subscribers	30.92 Million
Rural Subscribers	2.88 Million
Market share of PSU Operators	27.58%
Market share of Private Operators	72.42%
Tele-density	2.41%
Rural Tele-density	0.32%
Urban Tele-density	6.21%
No. of Village Public Telephones (VPT)	68,606
No. of Public Call Office (PCO)	20,652

Telecom Financial Data	
Gross Revenue (GR) during the quarter	Rs.87,926 crore
% change in GR over the previous quarter	4.05%
Applicable Gross Revenue (ApGR) during quarter	Rs.83,945 crore
% change in ApGR over the previous quarter	3.51%
Adjusted Gross Revenue (AGR) during the quarter	Rs.70,462 crore
% change in AGR over the previous quarter	3.87%
Share of Public sector undertakings in Access AGR	3.80%
Internet/Broadband Subscribers	
Total Internet Subscribers	954.40 Million
% change over previous quarter	1.95%
Narrowband subscribers	30.34 Million
Broadband subscribers	924.07 Million
Wired Internet Subscribers	40.27 Million
Wireless Internet Subscribers	914.13 Million
Urban Internet Subscribers	556.05 Million
Rural Internet Subscribers	398.35 Million
Total Internet Subscribers per 100 population	68.19
Urban Internet Subscribers per 100 population	111.75
Rural Internet Subscribers per 100 population	44.16
Total Outgoing Minutes of Usage for Internet Telephony	93.47 Million
No. of Public Wi-Fi Hotspots	1,65,147
Aggregate Data Consumed (GB)	41,11,451
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	922
Number of Pay TV Channels as reported by broadcasters	361
Number of private FM Radio Stations (excluding All India Radio)	388
Number of total active subscribers with pay DTH operators	61.97 Million
Number of Operational Community Radio Stations	494
Number of pay DTH Operators	4
Revenue & Usage Parameters	
Monthly ARPU of Wireless Service	Rs.153.54
Minutes of Usage (MOU) per subscriber per month - Wireless Service	995
Wireless Data Usage	
Average Wireless Data Usage per wireless data subscriber per month	20.27 GB
Average revenue realization per GB for wireless data usage during the quarter	Rs.8.74