

Summary

Trends of Indian Telecom Industry for September 2018

- 1) Total subscriber base at 1,191 million; YoY de-growth of 1.3%; MoM growth of 0.2%
- 2) 11 out of 22 circles reported increase in subscriber base on MoM basis; Rajasthan reported the highest MoM growth
- 3) Improvement in overall tele-density to 91.2%; Urban tele-density at 160.8%, rural tele-density at 58.9%
- 4) Wireless subscriber base at – 1,169 million; YoY de-growth of 1.2%; MoM growth of 0.2%
- 5) Active wireless subscriber base at 1,013 million; YoY de-growth of 0.4%; Stable on MoM basis
- 6) Top 3 telcos constitute 88.2% of the total wireless subscribers and 93.5% of the active wireless subscribers
- 7) Urban wireless subscriber base at 647.7 million; YoY decline of 5.4%; Stable on MoM basis
- 8) Rural wireless subscriber base at 521.6 million; YoY growth at 4.7%; MoM growth of 0.5%
- 9) Wireline Subscriber base at 22.1 million; YoY decline of 6.6%; BSNL/MTNL continue to be the market leader
- 10) Broadband subscriber base at 463.7 million; strong YoY growth of 48.3%
- 11) For June 2018 quarter, total minutes on network grew 41.4% YoY, while MoU per subscriber grew by 42.2%.
- 12) For June 2018 quarter, data subscriber base and per subscriber usage continued to report healthy YoY growth

Revenue trends for Indian Telecom Industry for quarter ending June 2018

- 1) Total AGR at Rs. 34,664 crore; YoY de-growth of 8.9%, AGR decline witnessed for all telcos
- 2) Bharti continues to be the revenue market leader with a 30.8% share, followed by RJio and Vodafone with 20.9% and 18.4% share respectively; Idea follows with 14.4% market share

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