

### Summary

#### Trends of Indian Telecom Industry for November 2018

- 1) Total subscriber base at 1,194 million; YoY growth of 0.7%; MoM growth of 0.1%
- 2) 20 out of 22 circles reported increase in subscriber base on MoM basis; North East reported the highest MoM growth
- 3) overall tele-density steady at 91.2%; Urban tele-density at 159.8%, rural tele-density at 59.3%
- 4) Wireless subscriber base at – 1,172 million; YoY growth of 0.8%; MoM growth of 0.1%
- 5) Active wireless subscriber base at 1,031 million; YoY growth of 2.5%; MoM growth of 0.9%
- 6) Vodafone Idea leads the market with active wireless subscriber market share of 39%, followed by Bharti at 33% and RJio at 22%
- 7) Urban wireless subscriber base at 645.7 million; YoY decline of 2.9%; MoM decline of 0.4%
- 8) Rural wireless subscriber base at 526.1 million; YoY growth at 5.7%; MoM growth at 0.8%
- 9) Wireline Subscriber base at 22.0 million; YoY decline of 6.2%; BSNL/MTNL continue to be the market leader
- 10) Broadband subscriber base at 511.9 million; strong YoY growth of 46.0%
- 11) For September 2018 quarter, total minutes on network grew 41.2% YoY, while MoU per subscriber grew by 43.9%.
- 12) For September 2018 quarter, data subscriber base and per subscriber usage continued to report healthy YoY growth

#### Revenue trends for Indian Telecom Industry for quarter ending September 2018

- 1) Total AGR at Rs. 34,108 crore; YoY de-growth of 14.3%, AGR decline witnessed for all telcos except RJio
- 2) Vodafone Idea remains the revenue market leader with a 31.4% share, followed by Bharti and RJio with 30.8% and 24.5% share respectively

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