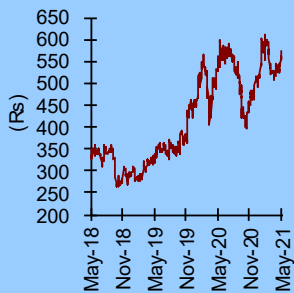


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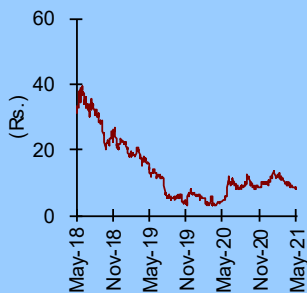
Telecom

Subscriber data for Feb'21

Bharti Airtel



Vodafone Idea



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Subscriber watch

Bharti wins more market share across categories

The Telecom Regulatory Authority of India (TRAI) has released its monthly data on subscribers (subs) for Feb'21. Industry-active subs rose 3.2mn with Bharti Airtel (Bharti) net add strong at 3.7mn subs; Reliance Jio (RJio) lost 0.2mns subs which explains its renewed aggression to push JioPhone. Mobile broadband (MBB) subs addition stood at 7.9mn with strong addition again for Bharti at 3.5mn. Bharti's MBB subs market share rose 40bps to 28.4% on active basis, while RJio's dipped 30bps to 49.8%; first time below 50% since its commercial launch. In the past 12 months, Bharti's subs addition has outpaced RJio in active and MBB again.

Industry-active subs rose 3.2mn

- Industry-active subs base expanded 3.2mn to 982mn (up 0.3% MoM but dipped 0.5% YoY), which was helped by strong total subs addition of 8.3mn or 0.7% MoM.
- RJio's active subs dipped 0.2mn to 324mn in Feb'21. Its subs decline was due to 85bps dip in active subs as % (of total base) to 78% in Feb'20 vs 79% in Jan'21. Total subs addition has improved 4.3mn to 415mn. This is the first time since its commercial launch that RJio's active subs have declined two months in row.
- Bharti's active subs rose 3.7mn to 340mn, most of which was driven by total subs net adds, thus, indicating the improving quality of subs addition.
- VIL's active subs declined 0.2mn (vs average 3.4mn in the past 12 months), resulting in an active subs base of 256mn in Feb'21. Total subs base has started growing with net add of 0.7mn, only second time in past 30 months.
- RJio's active subs market share dipped 10bps to 33% MoM, while Bharti's stood at 34.6% (up 30bps MoM) and VIL's dipped 10bps MoM to 26.1%. Bharti is widening its lead in active subs market share against RJio.
- In the past 12 months, RJio has added 12mn active subs; this compared to Bharti's net subs add on active and mobile broadband was 25.1mn and 41.6mn, respectively. For RJio, active subs and mobile broadband subs (active) are same.

Industry MBB (mobile broadband) subs rose 7.9mn led by strong growth for Bharti

- Industry-wide MBB subs rose 7.9mn to 742mn in Feb'21. The growth was led by continued strong net add for Bharti at 3.5mn (9mn addition in Jan and Feb'21).
- RJio's MBB subs base grew only 4.3mn to 415mn. Adjusted for inactive subs, its MBB market share stood at 49.8% (down 30bps MoM), while Bharti's was 28.4% (up 40bps MoM) and VIL's 18.9% (flattish MoM). It is the first month where RJio's MBB subs market share has dipped below 50%.
- VIL's MBB subs rose 0.6mn, which continues to remain slow paced, to 123mn.

RJio's wired broadband subs was steady at 0.18mn to 2.4mn

- Wired broadband subs were down 0.41mn MoM to 22.3mn (down 1.8% MoM but up 16.7% YoY growth) in Feb'21. Decline was due to BSNL subs erosion by 0.87mn.
- RJio's market share improved to 10.9% (up 100bps MoM), and net add stood at 0.18mn. Bharti's net add was up at 0.09mn, and market share improved to 13.4% (up 60bps MoM). Others (local service providers) net add was 0.18mn in Feb'21.

Industry MNP churn rate rose to 1%

- Industry porting dipped to 11.7mn, up 53% MoM in Feb'21. MNP churn rate rose to 1% (vs 0.7% in Jan'21). Looks like Bharti benefited from MNP churn.

Active subs: Industry adds 3.2mn subs

Active subscribers or visitor location register (VLR) is a temporary database of subs who have roamed in a particular area that an operator serves. Each BTS is served by exactly one VLR, hence, the unique registration. The VLR data is calculated on the basis of active subs in VLR on the date of peak VLR of a particular month for which the data is being collected. This data is collected from switches having a purge time of not more than 72 hours.

Table 1: Active subscriber base

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	MoM (%)	YoY (%)
Bharti Airtel	314	315	307	307	311	310	313	316	320	323	329	336	340	1.1	8.0
VIL	294	294	280	277	273	269	265	261	260	258	257	256	256	(0.1)	(13.0)
Reliance Jio	311	314	306	313	310	313	318	318	319	325	328	325	324	(0.0)	4.3
BSNL/MTNL	67	67	65	64	64	63	63	62	62	62	62	62	62	(0.2)	(7.3)
Total	987	989	958	961	958	956	957	958	961	968	975	979	982	0.3	(0.5)

Source: I-Sec research, TRAI

Table 2: Active subscriber market share

%	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Chg bps (MoM)	Chg bps (YoY)
Bharti Airtel	31.9	31.9	32.1	32.0	32.4	32.5	32.7	33.0	33.3	33.4	33.7	34.3	34.6	27 bp	271 bp
VIL	29.8	29.7	29.2	28.8	28.5	28.2	27.6	27.3	27.1	26.6	26.3	26.2	26.1	-11 bp	-376 bp
Reliance Jio	31.5	31.7	32.0	32.5	32.4	32.7	33.2	33.2	33.2	33.5	33.6	33.2	33.0	-13 bp	151 bp
BSNL/MTNL	6.8	6.7	6.7	6.7	6.7	6.6	6.5	6.5	6.5	6.4	6.4	6.3	6.3	-3 bp	-46 bp

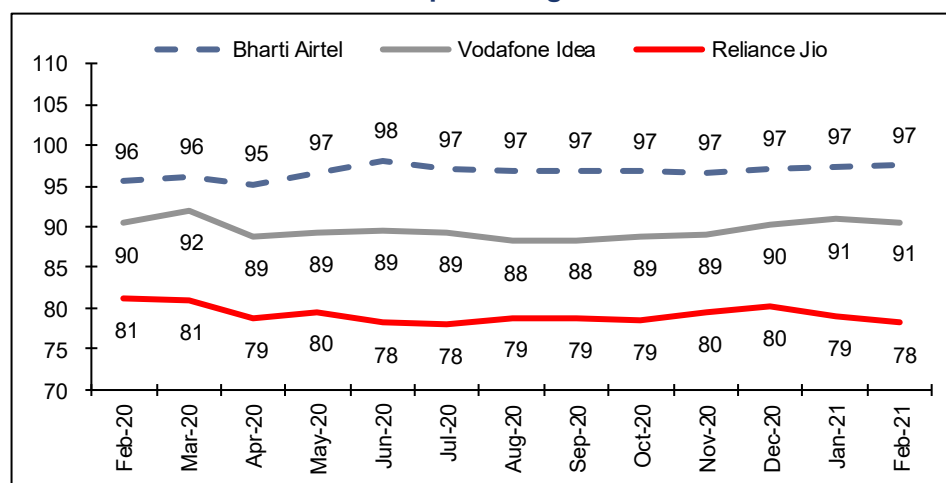
Source: I-Sec research, TRAI

Table 3: Active subscriber net adds

(mn, MoM)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti Airtel	1.5	0.9	(8.0)	(0.2)	3.7	(0.4)	2.3	3.8	3.0	3.9	5.5	6.9	3.7
VIL	(2.8)	(0.8)	(14.1)	(2.8)	(3.7)	(3.8)	(4.5)	(3.5)	(1.2)	(1.9)	(1.5)	(0.3)	(0.2)
Reliance Jio	1.3	2.5	(7.2)	6.2	(2.1)	2.5	4.6	0.7	1.1	5.4	3.2	(3.4)	(0.2)
BSNL/MTNL	0.4	(0.3)	(2.0)	(0.3)	(0.6)	(0.4)	(0.8)	(0.1)	(0.4)	0.1	(0.2)	0.1	(0.1)
Total	0.4	2.3	(31.3)	2.9	(2.8)	(2.1)	1.6	1.0	2.5	7.5	7.0	3.3	3.2

Source: I-Sec research, TRAI

Chart 1: Active subscriber as a percentage of total subscribers



Source: I-Sec research, TRAI

Mobile broadband subscribers: Industry net add was 7.9mn

Table 4: Mobile broadband subscriber-base (≥ 512kbps download)

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	MoM (%)	YoY (%)
Bharti Airtel	144	146	142	144	149	153	156	163	168	172	176	182	185	1.9	28.9
VIL	118	117	111	113	116	115	120	120	120	121	121	123	123	0.5	4.3
Reliance Jio	383	388	389	393	397	401	403	404	406	408	409	411	415	1.0	8.4
Others	17	17	14	14	15	15	16	17	18	19	19	19	19	(2.0)	11.7
Total	661	668	657	664	678	685	695	705	713	720	724	734	742	1.1	12.2

Source: I-Sec research, TRAI

Table 5: Mobile broadband subscriber market share

%	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Chg bps (MoM)	Chg bps (YoY)
Bharti Airtel	21.7	21.9	21.7	21.6	22.0	22.4	22.5	23.2	23.5	23.9	24.3	24.8	25.0	21 bp	324 bp
VIL	17.9	17.6	17.0	17.0	17.2	16.8	17.3	17.0	16.9	16.8	16.7	16.7	16.6	-10 bp	-127 bp
Reliance Jio	57.9	58.0	59.3	59.2	58.6	58.5	57.9	57.4	57.0	56.7	56.4	55.9	55.9	-2 bp	-196 bp
Others	2.5	2.5	2.1	2.2	2.3	2.2	2.3	2.4	2.6	2.6	2.6	2.6	2.5	-8 bp	-1 bp

Source: I-Sec research, TRAI

Table 6: Mobile broadband subscriber net adds

(mn, mom)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti Airtel	1.3	2.4	(3.8)	1.2	5.3	4.4	3.2	7.0	4.1	4.2	4.4	5.5	3.5
VIL	0.3	(0.8)	(6.1)	1.7	3.4	(1.2)	4.6	(0.1)	0.6	0.5	(0.2)	1.9	0.6
Reliance Jio	6.3	4.7	1.6	3.7	4.5	3.6	1.9	1.5	2.2	1.9	0.5	2.0	4.3
Others	(0.1)	(0.1)	(2.9)	0.7	0.8	0.1	0.7	1.1	1.1	0.3	0.2	0.4	(0.4)
Total	7.7	6.2	(11.2)	7.3	14.0	6.9	10.4	9.5	8.1	6.9	4.9	9.8	7.9

Source: I-Sec research, TRAI

Table 7: MBB subscriber market share on active basis

%	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti Airtel	24.4	24.6	24.8	24.6	25.2	25.7	25.6	26.4	26.8	27.0	27.4	28.0	28.4
VIL	20.0	19.8	19.4	19.4	19.7	19.3	19.7	19.4	19.3	19.0	18.8	18.9	18.9
Reliance Jio	52.8	52.8	53.4	53.6	52.5	52.4	52.1	51.4	51.0	51.1	51.0	50.1	49.8
Others	2.8	2.8	2.4	2.5	2.6	2.6	2.6	2.8	2.9	2.9	2.9	2.9	2.9
Total	100	100	100	100	100	100	100	100	100	100	100	100	100

Source: I-Sec research, TRAI

Total subscriber base

Table 8: Total subscriber base

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	MoM (%)	YoY (%)
Bharti Airtel	329	328	323	318	317	320	323	327	330	335	339	345	348	1.1	5.9
VIL	326	319	315	310	305	301	300	295	293	290	284	282	283	0.2	(13.2)
Reliance Jio	383	388	389	393	397	401	403	404	406	408	409	411	415	1.0	8.4
BSNL/MTNL	123	123	123	123	122	122	122	122	122	122	122	122	122	(0.3)	(1.1)
Total	1,161	1,158	1,150	1,144	1,141	1,144	1,148	1,149	1,152	1,155	1,154	1,159	1,168	0.7	0.6

Source: I-Sec research, TRAI

Table 9: Total subscriber market share

%	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Chg bps (MoM)	Chg bps (YoY)
Bharti Airtel	28.4	28.3	28.1	27.8	27.8	28.0	28.1	28.4	28.7	29.0	29.4	29.7	29.8	11 bp	148 bp
Vodafone Idea	28.0	27.6	27.4	27.1	26.7	26.3	26.1	25.7	25.4	25.1	24.6	24.3	24.2	-12 bp	-384 bp
Reliance Jio	33.0	33.5	33.8	34.3	34.8	35.0	35.1	35.2	35.3	35.3	35.4	35.4	35.5	11 bp	255 bp
BSNL/MTNL	10.6	10.6	10.7	10.8	10.7	10.7	10.7	10.7	10.6	10.6	10.6	10.5	10.4	-11 bp	-18 bp

Source: I-Sec research, TRAI

Table 10: Total subscriber net adds

(mn, mom)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti Airtel	0.9	(1.3)	(5.3)	(4.7)	(1.1)	3.3	2.9	3.8	3.7	4.4	4.1	5.9	3.7
VIL	(3.5)	(6.4)	(4.5)	(4.7)	(4.8)	(3.7)	(1.2)	(4.7)	(2.7)	(2.9)	(5.7)	(2.3)	0.7
Reliance Jio	6.3	4.7	1.6	3.7	4.5	3.6	1.9	1.5	2.2	1.9	0.5	2.0	4.3
BSNL/MTNL	0.4	0.1	(0.0)	0.2	(1.7)	0.4	0.2	0.1	(0.0)	(0.0)	(0.3)	0.1	(0.4)
Total	4.1	(2.8)	(8.2)	(5.6)	(3.2)	3.5	3.7	0.7	3.2	3.4	(1.4)	5.6	8.3

Source: I-Sec research, TRAI

Rural subscribers

Table 11: Rural subscriber base

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	MoM (%)	YoY (%)
Bharti Airtel	150	153	156	153	151	152	153	154	156	159	160	163	165	1.3	9.6
VIL	168	167	164	168	166	165	163	160	157	156	153	152	150	(1.0)	(10.7)
Reliance Jio	159	161	162	164	166	168	169	170	171	172	173	174	176	1.1	10.6
Others	40	38	38	38	38	38	38	38	38	38	38	38	38	(0.3)	(5.7)
Total	517	519	520	524	522	523	523	522	523	525	524	526	528	0.4	2.2

Source: I-Sec research, TRAI

Table 12: Rural subscriber market share

%	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Chg bps (MoM)	Chg bps (YoY)
Bharti Airtel	29.1	29.5	30.0	29.2	29.0	29.1	29.2	29.4	29.9	30.3	30.6	30.9	31.2	27 bp	212 bp
VIL	32.5	32.2	31.6	32.2	31.8	31.5	31.2	30.7	30.1	29.7	29.2	28.8	28.4	-42 bp	-407 bp
Reliance Jio	30.7	31.0	31.1	31.3	31.9	32.1	32.3	32.6	32.8	32.8	33.0	33.0	33.2	21 bp	255 bp
Others	7.8	7.3	7.3	7.3	7.3	7.3	7.3	7.3	7.3	7.2	7.2	7.2	7.2	-5 bp	-60 bp

Source: I-Sec research, TRAI

Table 13: Rural subscriber net adds

(mn, mom)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti Airtel	2.7	2.7	2.6	(2.6)	(2.1)	1.2	0.3	1.3	2.2	2.9	1.5	2.4	2.1
Vodafone Idea	(2.7)	(1.0)	(2.6)	4.0	(2.4)	(1.2)	(1.6)	(2.9)	(3.0)	(1.7)	(2.7)	(1.3)	(1.6)
Reliance Jio	3.1	2.2	0.8	2.1	2.4	1.8	0.9	1.0	1.1	1.1	0.6	0.9	1.9
Others	2.3	(2.0)	(0.0)	0.1	(0.1)	0.0	(0.1)	0.1	(0.1)	(0.0)	(0.0)	0.0	(0.1)
Total	5.4	1.9	0.8	3.6	(2.1)	1.9	(0.5)	(0.6)	0.1	2.3	(0.7)	2.0	2.3

Source: I-Sec research, TRAI

Wired broadband subscribers

Table 14: Wired broadband subscribers

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti	2.5	2.5	2.4	2.4	2.5	2.5	2.5	2.6	2.7	2.7	2.8	2.9	3.0
BSNL	8.1	8.1	8.0	7.9	7.9	7.9	7.9	7.8	7.8	7.7	7.7	7.7	6.8
RJio	0.8	0.9	0.9	1.0	1.1	1.2	1.3	1.5	1.7	1.9	2.1	2.3	2.4
Hathway	0.9	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1	1.0	1.1	1.1	1.1
Others	6.7	6.8	6.7	7.1	7.4	7.6	7.8	8.2	8.3	8.5	8.7	8.8	9.0
Total	19.1	19.2	19.0	19.4	19.8	20.1	20.5	21.1	21.5	21.9	22.3	22.7	22.3

Source: I-Sec research, TRAI

Table 15: Wired broadband subscriber market share (%)

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti	12.8	12.9	12.8	12.4	12.5	12.4	12.4	12.3	12.4	12.5	12.6	12.8	13.4
BSNL	42.5	42.1	41.9	40.9	39.9	39.0	38.3	36.9	36.0	35.3	34.5	33.9	30.6
RJio	4.4	4.5	4.7	5.0	5.3	5.8	6.1	7.2	7.9	8.5	9.3	9.9	10.9
Hathway	4.9	5.1	5.1	5.0	5.0	5.0	5.0	5.0	4.9	4.8	4.7	4.7	4.8
Others	35.3	35.4	35.4	36.6	37.3	37.8	38.2	38.6	38.8	38.9	38.9	38.7	40.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: I-Sec research, TRAI

Table 16: Wired broadband subscriber net adds

Subs (mn)	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21
Bharti	0.02	0.02	(0.03)	(0.03)	0.06	0.02	0.04	0.07	0.07	0.06	0.08	0.09	0.09
BSNL	(0.12)	(0.03)	(0.11)	(0.04)	(0.03)	(0.04)	(0.01)	(0.05)	(0.05)	(0.02)	(0.03)	(0.01)	(0.87)
RJio	-	0.03	0.03	0.07	0.09	0.10	0.09	0.27	0.18	0.17	0.20	0.18	0.18
Hathway	0.02	0.03	-	-	0.02	0.02	0.02	0.02	-	(0.01)	0.01	0.01	0.01
Others	0.07	0.06	(0.05)	0.36	0.30	0.21	0.20	0.34	0.19	0.18	0.14	0.11	0.18
Total	(0.01)	0.11	(0.16)	0.36	0.44	0.31	0.34	0.65	0.39	0.38	0.40	0.38	(0.41)

Source: I-Sec research, TRAI

Table 17: Circle-wise active subscribers for each operator in Feb'21

Circles (subs mn)	Bharti	VIL	RJio	Other	Total
Metros					
Delhi	15.0	12.6	12.7	0.3	40.5
Mumbai	7.8	8.7	8.4	0.4	25.3
Kolkata	5.6	6.0	8.9	1.1	21.6
A' Circle					
Maharashtra	19.6	30.3	30.6	4.0	84.6
Gujarat	12.1	23.3	19.7	2.8	57.9
A.P.	30.0	14.6	23.5	5.7	73.8
Karnataka	28.6	8.3	16.4	3.8	57.0
T.N.	25.5	17.9	20.4	7.3	71.2
B' Circle					
Kerala	6.8	16.3	7.7	7.2	38.0
Punjab	11.8	8.0	8.0	2.4	30.2
Haryana	5.9	7.6	6.2	1.8	21.5
U.P.(W)	17.3	17.6	15.1	2.5	52.5
U.P.(E)	34.8	20.5	25.3	4.2	84.9
Rajasthan	21.2	11.3	18.4	2.9	53.9
M.P.	14.6	18.6	28.7	2.8	64.7
W.B.	14.8	16.2	17.8	1.9	50.7
C' Circle					
H.P.	3.3	0.7	2.8	1.1	7.9
Bihar	34.0	10.5	28.4	2.8	75.7
Odisha	11.1	2.2	11.6	3.9	28.8
Assam	9.0	2.9	7.0	1.4	20.4
N.E.	5.5	1.3	3.5	0.9	11.1
J&K	5.2	0.4	3.4	0.7	9.7
Pan-India	339.5	256.1	324.3	62.0	981.9

Source: I-Sec research, TRAI

Table 18: Circle-wise active subscriber market share for each operator in Feb'21

Circles (%)	Bharti	VIL	RJio	Other
Metros				
Delhi	37.0	31.0	31.2	0.7
Mumbai	30.9	34.4	33.0	1.6
Kolkata	26.0	27.9	41.1	5.1
A' Circle				
Maharashtra	23.2	35.9	36.2	4.7
Gujarat	20.9	40.3	34.0	4.8
A.P.	40.7	19.7	31.9	7.7
Karnataka	50.1	14.6	28.7	6.6
T.N.	35.8	25.2	28.7	10.3
B' Circle				
Kerala	17.8	43.0	20.2	19.0
Punjab	39.2	26.5	26.4	7.9
Haryana	27.4	35.4	28.8	8.4
U.P.(W)	33.0	33.6	28.6	4.8
U.P.(E)	41.0	24.2	29.9	5.0
Rajasthan	39.4	21.1	34.2	5.4
M.P.	22.5	28.8	44.3	4.4
W.B.	29.1	31.9	35.2	3.7
C' Circle				
H.P.	42.0	8.7	35.8	13.5
Bihar	44.9	13.9	37.5	3.7
Odisha	38.6	7.7	40.2	13.5
Assam	44.3	14.4	34.4	7.0
N.E.	49.5	11.3	31.1	8.1
J&K	53.4	4.4	34.9	7.3
Pan-India	34.6	26.1	33.0	6.3

Source: I-Sec research, TRAI

Table 19: Circle-wise active subscriber market share for each operator in Jan'21

Circles (%)	Bharti	VIL	RJio	Other
Metros				
Delhi	37.0	31.2	31.2	0.6
Mumbai	30.9	34.4	33.0	1.6
Kolkata	25.9	27.8	41.2	5.0
A' Circle				
Maharashtra	22.8	36.2	36.2	4.8
Gujarat	20.3	40.0	34.8	4.9
A.P.	40.5	19.7	32.0	7.8
Karnataka	49.8	14.8	28.8	6.6
T.N.	36.4	25.4	27.8	10.4
B' Circle				
Kerala	17.5	43.1	20.4	19.0
Punjab	38.9	26.4	26.8	7.9
Haryana	28.4	34.7	28.6	8.3
U.P.(W)	31.5	33.4	27.3	7.8
U.P.(E)	41.1	25.3	30.5	3.1
Rajasthan	38.3	20.8	35.6	5.3
M.P.	22.2	28.4	45.0	4.4
W.B.	29.5	31.6	35.1	3.8
C' Circle				
H.P.	41.6	9.2	35.7	13.5
Bihar	44.5	14.1	37.7	3.8
Odisha	38.8	7.8	39.9	13.5
Assam	43.7	14.7	34.6	7.0
N.E.	49.2	11.5	31.2	8.1
J&K	52.5	4.4	35.9	7.2
Pan-India	34.3	26.2	33.2	6.3

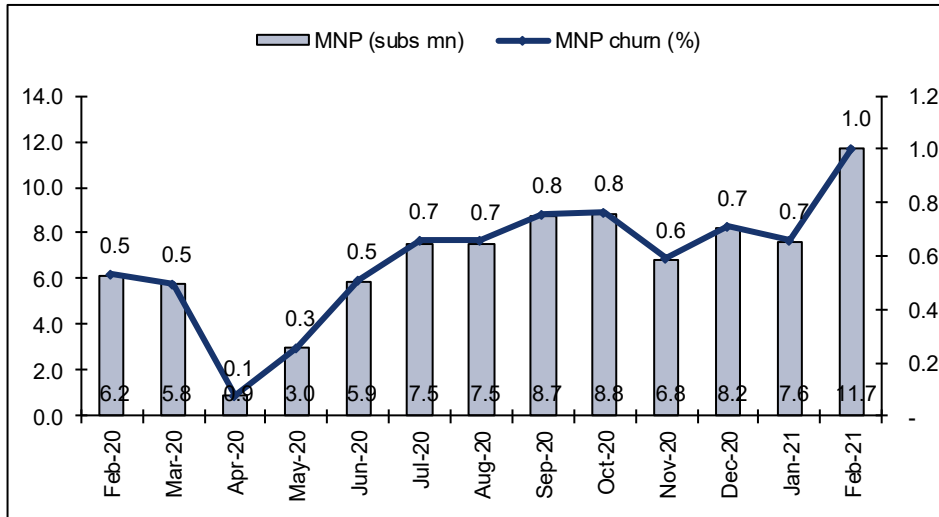
Source: I-Sec research, TRAI

Table 20: Circle-wise active subscriber market share for each operator in Feb'20

Circles (%)	Bharti	VIL	RJio	Other
Metros				
Delhi	32.7	34.8	31.5	0.8
Mumbai	27.0	35.8	35.4	1.5
Kolkata	27.2	31.6	36.4	4.3
A' Circle				
Maharashtra	19.3	43.4	32.2	5.0
Gujarat	18.0	44.2	32.5	5.4
A.P.	40.2	21.7	29.8	8.3
Karnataka	46.6	18.6	27.3	7.4
T.N.	34.1	27.5	26.2	12.2
B' Circle				
Kerala	15.0	47.7	16.6	20.6
Punjab	33.6	27.4	30.9	8.1
Haryana	22.6	39.1	29.1	9.2
U.P.(W)	25.4	40.9	28.7	5.0
U.P.(E)	36.0	29.4	29.2	5.4
Rajasthan	37.1	23.2	34.2	5.4
M.P.	20.9	32.4	42.0	4.7
W.B.	29.7	35.4	31.1	3.8
C' Circle				
H.P.	42.5	10.8	31.7	15.1
Bihar	43.3	16.6	36.4	3.7
Odisha	38.1	10.8	37.1	14.0
Assam	40.3	18.8	33.6	7.2
N.E.	46.8	13.8	29.6	9.8
J&K	55.7	5.5	31.4	7.4
Pan-India	31.9	29.8	31.5	6.7

Source: I-Sec research, TRAI

Chart 2: MNP churn rose to 1%



Source: I-Sec research, TRAI

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