

India Telecom - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The India Telecom Market size is estimated at USD 48.61 billion in 2024, and is expected to reach USD 76.16 billion by 2029, growing at a CAGR of 9.40% during the forecast period (2024-2029).

Key Highlights

- According to the IBEF, India has the world's second-largest telecom market. The total subscriber base, wireless subscriptions, and wired internet subscriptions have increased steadily. As of April 2022, teledensity stood at 84.88%, total broadband subscriptions increased to 788.77 million, and the overall subscriber base stood at 1.16 billion.
- In the first quarter of FY22, total wireless data usage in India increased by 16.54% quarterly to 32,397 PB. In the third quarter of FY21, 3G and 4G data usage contributed 1.78% and 97.74%, respectively, to total wireless data usage. In the same quarter, the share of 2G data use was 0.48%.
- The Department of Telecommunications (DoT) in India released the draught Telecom Bill 2022, which intends to alter the relationship between the government and the telecom industry. The main idea is to combine three acts (the Indian Telegraph Act 1885, the Indian Wireless Telegraphy Act 1933, and the Telegraph Wires (Unlawful Protection) Act 1950) into one.
- The first draught was recently used for public/stakeholder feedback. The law focuses primarily on the ease of doing business, providing sufficient infrastructure, making better use of the "valuable" spectrum, and establishing norms and procedures for litigation. Some key amendments are OTT players coming under a telecom infrastructure push, licensing regime, limiting, and (Telecom Regulatory Authority of India) TRAI.
- The telecom sector in India is expanding due to increasing end-user applications and growth in markets like IoT, cloud, data centers, and 5G. The country is also witnessing an increase in internet consumption. Market players are developing new internet plans to fulfill the growing demand for internet services and grab a more significant portion of the market.
- According to the announcement given by the telecom minister of India at TV9's Global Summit, 5G will be available in 20-25

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towns and cities by the end of 2022, most likely by August or September.

-Every industry was affected by the COVID-19 outbreak. The telecom industry was significantly impacted, as it is essential for medical, government, and private-sector commercial activities to operate seamlessly. For instance, reliable, high-speed internet access is critical in ensuring that hospitals and medical institutions access worldwide information networks and resources needed to combat the virus. Broadband access is also vital for educational institutions and enterprises to continue providing essential services.

-The coronavirus's unexpected disruption of typical business operations prompted enterprises to operate remotely. This transition increased the demand for stronger network connectivity and internet availability, particularly in isolated or rural locations. Thus, the telecom (wireless and wireline) industry is attempting to provide better internet infrastructure to its clients. Even after the pandemic, the market is gaining traction across the country.

India Telecom Market Trends

Increasing Penetration of 4G and Upgradation of 5G

- Affordable rates, expanding 3G and 4G coverage, the advent of 5G shifting customer consumption patterns, the government's initiatives to strengthen India's domestic telecom manufacturing capacity, and a favorable regulatory environment contributed to the industry's exponential expansion in recent years.

- In October 2022, Bharti Airtel ("Airtel"), India's significant provider of communications solutions, announced the introduction of Airtel 5G+ in many major cities across the country. Customers in Delhi, Mumbai, Chennai, Bengaluru, Hyderabad, Siliguri, Nagpur, and Varanasi can enjoy cutting-edge Airtel 5G Plus services in stages as the firm builds its network and completes the rollout.

- The Department of Telecommunications was allocated INR 84,587 crores (USD 11.11 billion) in the Union Budget 2022-23, of which INR 30,436 crores (USD 3.99 billion) was revenue expenditure (36% of total expenditure) and INR 54,150 crore (USD 7.11 billion) was capital expenditure (64.01% of total expenditure).

- The government approved the sale of IMT/5G spectrum to deploy 5G services throughout the country to accelerate digital connectivity. This auction was completed by July 2022, grossing USD 18.77 billion.

- According to the IBEF, increased mobile phone penetration and lower data costs would bring 500 million new internet users across the country over the next five years, offering new business opportunities.

- In March 2021, Vodafone Idea Ltd (VIL) claimed that the purchased spectrum in five circles would assist boost 4G coverage and capacity, allowing it to provide users with an "improved digital experience."

Growth of Data and Messaging Services

- In India, the demand for data and messaging services has been rising with an increase in telecom tower services across the country. For instance, The Indian telecom tower sector grew by 65% in the last seven years. Mobile towers increased from 4 lakhs in 2014 to 6.6 lakhs in 2021. Moreover, the number of mobile base transceiver stations climbed by 187%, from 8 lakhs in 2014 to 23 lakhs in 2021.

- Smartphones are a major source of data consumption and messaging services in India. According to the GSMA, India is on the path of becoming a significant smartphone market by 2025, with approximately 1 billion installed devices. It is predicted to have 920 million unique mobile customers by 2025, including 88 million 5G connections. 5G technology is expected to add USD 450 billion to the Indian economy between 2023 and 2040.

- The government focuses on increasing broadband network services, which will increase the use of Data. For instance, in July 2021, Bharat Broadband Network Limited (BBNL), on behalf of the Department of Telecommunications, issued a global

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procurement for the establishment of BharatNet in nine distinct packages covering 16 states during a 30-year concession period. The government would pay a maximum grant of INR 19,041 crores (USD 2.56 billion) as viability gap finance for this project.

- The Department of Telecommunications (DoT) formed a sixth-generation (6G) innovation group to drive the development of 6G technologies.
- Among the primary factors that lead to the segment's rise are the use of more than one device per user, high rates of replacement, and people transitioning from traditional phones to smartphones as prices drop.

India Telecom Industry Overview

The Indian telecom market is consolidated with key players, such as Reliance Jio Infocomm, Bharti Airtel, Vodafone Idea Limited, Vodafone Idea Limited, and Mahanagar Telephone Nigam Ltd. (MTNL) occupying the most market shares. These players focus on deploying the 5G network and increasing network capacity across the country to remain competitive in the market.

- October 2022 - Jio, following the successful announcement of its True-5G services in the India Mobile Congress 2022, launched the Beta trial of its True-5G services for Jio users in four cities - Delhi, Mumbai, Kolkata, and Varanasi - on the auspicious festival of Dussehra.
- October 2022 - Bharti Airtel ("Airtel"), India's significant provider of telecommunications services, announced the launch of the "Always On" IoT connectivity solution in India. Airtel's "Always On" solution includes a dual profile M2M eSim that allows an IOT device to stay connected to a mobile network from several Mobile Network Operators (MNOs) in the eSIM.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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