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"Think Tank for Digital Transformation"

Market Update on India

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INDIA TODAY

Market Indices

- Data Usage is exploding - India is now collectively world's largest data consumer/month and also the highest per capita user for mobile data
- India has the highest per capita consumption of online videos in the world
- [1] Online video consumption in India has doubled in the last 2 years to a whopping 3.7 billion videos per month. This is expected to rise even higher
- [2] Online Video audience is expected to grow to 1 Bn by 2025
- [3] Total Broadband Subscribers are approx. 783 Mn - over 98% are on Mobile (4G)
- [4] Total fixed Broadband Subscribers showing steady increase over the past one year and is at approx.~27 Mn.

1. CII & BCG (2021)
2. https://techstory.in/esports-streaming-industry-is-projected-to-reach-3-5-billion-by-2025/#:
3.& 4. TRAI Monthly Performance Data- Feb 2022

Average Data Usage/month
vs
BB penetration (Global Comparison)

FUTURE DIRECTION :

- Recognition of Future Potential translating into Market Opportunities
- PM Gati Shakti Mission
- Telecom Reforms 1.0
- TRAI Recommendations on 5G Spectrum

Source: 2020- Data from ITU,
USA data from CTIA,
India data from TRAI too ;
2021- Data from TRAI

Although penetration is very low, Data Consumption is very high.
Potential for Growth is very high

India – A Status Update
PM Gati Shakti Mission

Key Highlights:

- PM Gati Shakti-National Master Plan for Infrastructure Development was launched on 13th October 2021, with the objective of making India the hub of World Class Digital Infrastructure.
- PM Gati Shakti — a digital platform — is intended to bring 16 Ministries including Railways and Roadways together for integrated planning and coordinated implementation of infrastructure connectivity projects.
- Will enable to break Departmental silos and institutionalize holistic planning for stakeholders across major infrastructure projects.
- All Departments to now have visibility of each others' projects through a centralized portal.
- To generate multiple employment opportunities, cut down logistics cost, improve supply chains and make local goods globally competitive.

Key Highlights of Telecom Reforms 1.0

Structural Reforms

- Rationalization of Adjusted Gross Revenue: Non-telecom revenue will be excluded on prospective basis from the definition of AGR.
- Spectrum Tenure: In future Auctions, tenure of spectrum increased from 20 to 30 years.
- No Spectrum Usage Charge (SUC) for spectrum acquired in future spectrum auctions.
- To encourage investment, 100% Foreign Direct Investment (FDI) under automatic route permitted in Telecom Sector. All safeguards will apply.
- Payment of Dues:
  - Moratorium/Deferment up to four years in annual payments of dues
  - Convert the dues pertaining to the said deferred payment into equity at the end of the Moratorium/Deferment period.

Telecom Reforms 2.0 on the anvil

India-a Status Update

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TRAI Recommendations on 5G Spectrum (1)

- *Total Spectrum for auction is 53,108.25 MHz (if TDD spectrum is halved to enable aggregation with FDD). [5]
- *Spectrum Value @ Reserve Price is USD 66.83 Bn (INR 5,07,937 Cr).[6]
- Spectrum in existing bands (800, 900, 1800, 2100, 2300 & 2500 MHz) and new 5G Spectrum Bands (612-703 MHz, 700 MHz, 3300-3670 MHz and 24.25-28.5 GHz) has been made fully available for auction. [7]

NEXT STEPS

- DoT to seek approval of multi-ministerial DCC before Cabinet Approval of TRAI recommendations.
- Notice inviting Auctions likely by mid-May 2022
- Mega Spectrum Auction likely to take place in May-June 2022
- Roadmap for 'soft launch' of 5G by 15th August 2022

*20 year License Period ; 5. TRAI Recommendations on 'Auction of spectrum in frequency bands identified for IMT/5G' 6. Derived from TRAI Recommendations on 'Auction of spectrum in frequency bands identified for IMT/5G' 7. TRAI Recommendations on 'Auction of spectrum in frequency bands identified for IMT/5G'

India-a Status Update

TRAI Recommendations-Private 5G Networks (2)

- One of the Key Recommendations by TRAI is on Private Networks, termed as 'Captive Wireless Private Networks' (CPWN).
- Two distinct approaches viz.

  a) TSPs can provide CWPNs by leasing spectrum to enterprises, purchased through auction, under a separate authorization in their existing service license.

  b) DoT can directly allocate spectrum to Enterprises under an ultra-light touch license.
- TRAI has recommended Spectrum for Private networks (to be allocated administratively) in the following IMT bands:
  - 3700-3800 MHz band (40 MHz)
  - 4800-4990 MHz band (40 MHz)
  - 28.5-29.5 GHz band (400 MHz)

India's 6G Vision Roadmap

DoT has formed a Technology Innovation Group for 6G (TIG-6G) consisting of multiple stakeholders from Government, industry, academia, SMEs, etc.

This is playing an active role in driving the direction & vision of each of these 6 WGs which are :

1. Multi-platform Next Generation Networks
2. Spectrum Policy Task Force
3. Multi-disciplinary Innovative Solutions
4. Devices
5. International Standards Contribution
6. Financing Research and Development

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Thank you

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