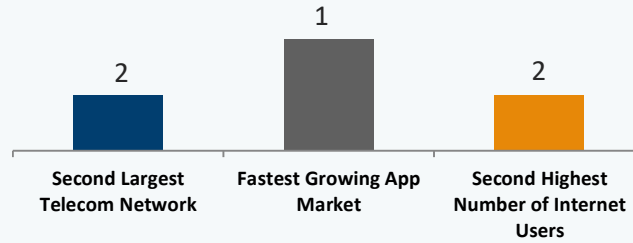


TELECOMMUNICATIONS



MARKET SIZE

Global Rank

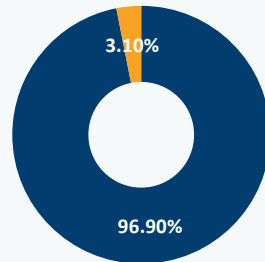


The subscriber base of 1,200.80 million as of March 2025.

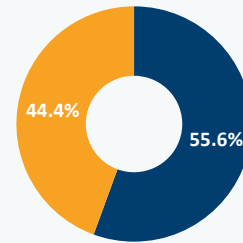


SECTOR COMPOSITION

Composition of Telephone Subscribers (December 2024)



■ Wireless
■ Wireline

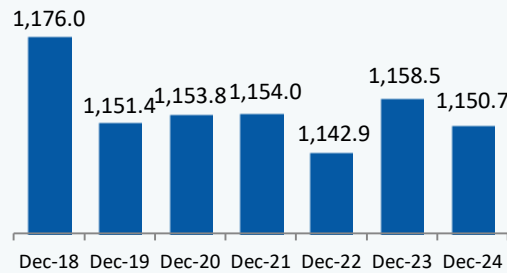


■ Urban
■ Rural

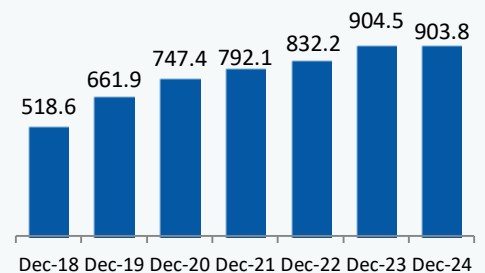


KEY TRENDS

Wireless Subscription (million)



Broadband Subscribers (million)



GOVERNMENT INITIATIVES



Satellite-based NB-IoT
(Narrowband-Internet of Things)



Phased Manufacturing Programme (PMP)



100% FDI



ADVANTAGE INDIA

- Robust demand:** Tele-density of rural subscribers reached 59.06% as of March 2025. Total volume of wireless data usage increased by more than 2 folds from 47,629 petabytes in Q2, FY24 to 49,543 petabytes in Q3, FY24.
- Increasing Investment:** In the Union Budget FY26 the Department of Telecommunications and IT was allocated Rs. 81,005.24 crore (US\$ 9.27 billion).
- Policy support:** The Union Cabinet approved Rs. 12,195 crore (US\$ 1.65 billion) production-linked incentive (PLI) scheme for telecom & networking products under the Department of Telecom. DoT and CDRI launched the DRRAF report to boost telecom resilience against disasters, focusing on risk assessment, preparedness, and cross-sector collaboration for uninterrupted connectivity.
- Attractive opportunities:** India's 5G subscriber base is expected to grow 2.65 times, reaching 770 million by CY28, up from 290 million in CY24, according to Nokia's annual Mobile Broadband Index (MBiI) report. ServiceNow's research forecasts that India's workforce will grow by 33.89 million, from 423.73 million in 2023 to 457.62 million by 2028, driven by emerging technologies. India's 5G subscriptions to have 350 million by 2026, accounting for 27% of all mobile subscriptions. By 2025, India will need ~22 million skilled workers in 5G-centric technologies such as Internet of Things (IoT), Artificial Intelligence (AI), robotics and cloud computing. Prime Minister Mr. Narendra Modi launched 5G services on October 1, 2022.