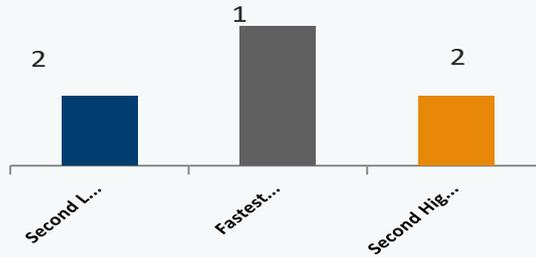


TELECOMMUNICATIONS



MARKET SIZE

Global Rank

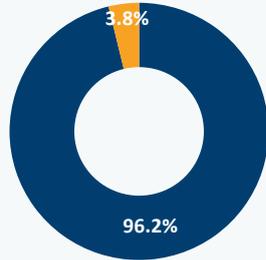


Total telephone subscriber base of 1.22 billion as of September 2025.

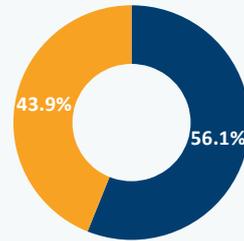


SECTOR COMPOSITION

Composition of Telephone Subscribers (September 2025)



■ 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 59.52% as of September 2025. India's satellite communications (SATCOM) sector is set for robust growth, with the market expected to double over the next few years, Union Minister for Communications Mr. Jyotiraditya M. Scindia said. Highlighting the government's proactive approach, he noted that three SATCOM licenses have already been issued and that regulatory frameworks and licensing processes are being formalised.
- 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. India's draft National Telecom Policy 2025 (NTP-25) aspires to achieve 100% 4G coverage and 90% 5G population coverage by 2030 underscoring a bold vision to elevate digital inclusion and infrastructure.
- Attractive opportunities:** In November 2025, the Minister of State for Communications highlighted a US\$ 25 billion opportunity in telecom component manufacturing in India. He emphasized government support through fast-tracked approvals and simplified compliance for global investors to build in India. Andhra Pradesh was showcased as a key investment destination with strong industrial ecosystems supporting telecom and electronics manufacturing.