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5G Market in India 2020

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Abstracts

Market insights

The fifth-generation cellular or 5G network technology is predicted to accelerate the digital growth of India. Ultra-fast speed, high bandwidth and low latency of 5G are envisioned to fuel the digital transformation of the country. In India, the commercial launch of 5G is expected to transpire in late 2020. The 5G market in India is projected to be valued at INR 32.43 Bn by 2020 and is estimated to reach INR 19,053.09 Bn by 2025, expanding at an exceptional compound annual growth rate (CAGR) of 96.69% during the 2021-2025 period. The auction of 5G spectrum by TRAI was scheduled in the second quarter of 2020; however, it has been postponed until late 2020, owing to the COVID-19 pandemic.

Potential applications of 5G:

Sustainable pricing of spectrum, stable policy and regulatory landscape, and innovative use cases are estimated to be key enablers accelerating the growth of the 5G market in India. Agriculture, automotive, manufacturing, healthcare, energy & utilities, and media & entertainment are likely to be the potential end-user industries of 5G. It is expected to revolutionize the agriculture industry through high-speed data transfer in agricultural drone, smart irrigation, precision farming, and monitoring of soil, crop and livestock.

In the automotive industry, 5G is expected to fast track the implementation of connected cars, V2X (vehicle to everything), autonomous driving, and smart transportation system. The manufacturing industry is predicted to leverage 5G in connected and smart factories, synchronized planning, smart supply-chain network, and smart logistic operations. Furthermore, 5G is likely to digitally transform the healthcare industry through the application of internet of medical things (IoMT), connected healthcare, patient data management and online consultation.

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5G is expected to find extensive use in smart cities. The major smart city applications of 5G are anticipated to be smart utility management systems, smart grids and metering systems, smart traffic management systems, smart traffic lights, video surveillance and analytics, and waste management.

Market influencers:

India has been the largest consumer of data in the world. The country accounted for the consumption of 11 GB data per month per user, on an average. The existing broadband technology falls short to meet the soaring demand owing to lack of adequate infrastructure. 5G has enormous potential to accomplish the various gaps of the existing 4G LTE technology like low mobility speed, high latency and capital intensive deployment. 5G has high data speed, which improves mobility and user experience. Furthermore, the less than one millisecond latency satisfies the acute criteria of industrial and IoT applications. Furthermore, the highly reliable and secured 5G network is crucial to support the budding IoT landscape in India. The mass adoption of IoT devices and applications is projected to foster the 5G market in India.

The commercial launch of 5G is thwarted by high price of 5G spectrum, high CAPEX, lack of infrastructure and data security concerns. The pricing of the 5G spectrum recommended by TRAI is exorbitant as compared to the international market, challenging the financially struggling Indian telecom industry. The 5G infrastructure requires fiberized towers, network densification and specialized base station, leading to gigantic CAPEX investments for telecom players. Vodafone Idea Limited, Bharti Airtel Limited and Reliance Jio Infocomm Limited together would require a capital expenditure of around INR 2.1 Tn over the next five years for 5G infrastructure.

Impact of COVID-19:

The crisis caused by the COVID-19 pandemic has delayed the 5G roll out plan in India. The 5G spectrum auction, which was scheduled in June 2020, has been postponed. Furthermore, 3GPP has also delayed the release of 5G standards. This in turn, has led layers to stall the production of infrastructure equipment and devices. As a result of the delay in 5G spectrum auction, companies like Samsung and Oppo have launched their recent products without 5G support in India, while the same devices have 5G support features in other country markets. Although the launch has been delayed, the market witnessed a sharp rise in the demand for high-speed data amid the pandemic. An exponential rise in data traffic, the requirement of seamless network connection for

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remote working and penetration of IoT devices are projected to mark a positive impact of the 5G market amid the pandemic.

Competitive landscape

Telecom operators in India have been keen to harness the 5G opportunity. Strategic collaboration with equipment and infrastructure vendors have been a major focus of telecom companies. Bharti Airtel Limited established strategic alliances with international vendors like Nokia, Ericsson, Cisco, IBM and Red Hat over the recent past to build 5G infrastructure. Vodafone Idea Limited has entered a multi-year agreement with Ericsson to deploy 5G-ready wireless equipment in India. On the other hand, Reliance Jio Infocomm (Jio) has been strengthening the development of indigenous end-to-end 5G technology.

Companies covered

5G service providers

- Bharti Airtel Limited
- Bharat Sanchar Nigam Limited
- Reliance Jio Infocomm Limited
- Vodafone Idea Limited

Infrastructure equipment vendors

- Cisco Systems, Inc.
- Ericsson
- Huawei Technologies Co., Ltd
- Nokia Oyj
- ZTE Corporation

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