

## Trends in 2010: India telecoms market

<https://marketpublishers.com/r/T820621C9C2EN.html>

Date: February 2010

Pages: 15

Price: US\$ 895.00 (Single User License)

ID: T820621C9C2EN

### Abstracts

The Indian telecoms industry has experienced impressive growth over the last few years. We expect this growth to continue in 2010. In this report, we outline key trends and issues which will shape the industry during the year.

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Executive summary

In a nutshell

Ovum view

'Bottom of pyramid' customers will drive mobile subscriber additions

Price competition will remain intense

Accelerated take-up of mobile banking and m-commerce

Drive for rural value-added services (VASs) focused on occupation, education and healthcare

3G focus on expanding capacity and broadband access

Focus on driving broadband in lucrative markets

DTH and IPTV will drive a gradual shift to better TV

Wholesale services will start to come of age

International M&A and partnerships will stay on the agenda

High profitability potential will fuel growth for enterprise services

Key trends

Mobile connections growth

Low penetration in Circle C and rural areas

Launch of services by new licensees

Continued trend of multiple SIM ownership in developed service areas

Price war among mobile operators

Intensifying competition and the battle for market share

Customers' price sensitivity

Lack of differentiation in services offered

Introduction of mobile number portability (MNP)

Mobile banking and m-commerce

Favourable changes in regulation

A large number of unbanked people

A much higher penetration of mobile services, compared to Internet

Focus on no-frills narrowband applications

Value-added services for rural customers

Mobile as a suitable means to fill the information gap

Focus on occupational needs, education and healthcare

Solutions designed to overcome literacy and affordability challenges

3G services and applications

Much of the spectrum is expected to be used to fulfil capacity needs

Broadband access will be the key application

A 'killer app' is unlikely

Increasing broadband availability in lucrative markets  
Fixed broadband access  
Fixed wireless broadband access  
Mobile broadband access  
Gradual transition from cable TV to DTH and IPTV  
Unorganised and fragmented cable industry  
Telco support for DTH  
Installed base and declining prices of high-definition TVs  
Increasing investment in improving IPTV coverage and quality  
Acceleration of wholesale services  
Conducive regulatory environment  
New operators' imperative to reduce time-to-market and capex  
Changing attitudes towards wholesale opportunities  
International mergers, acquisitions and partnerships  
Focus on Africa and the Indian sub-continent  
Political hurdles may derail efforts  
Profitable growth through enterprise services  
Focus on fixed voice and data services  
Integrated service operators better positioned to succeed  
Bharti Airtel: a formidable challenger to Reliance and Tata  
Increased focus on the small to medium-sized enterprise segment

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