

WiMAX in India: an assessment

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Abstracts

WiMAX has generated a lot of interest in India. Due to limited 3G spectrum and low broadband penetration, India is expected to be a key growth market for the technology. Many industry players believe that the allocation of broadband wireless access (BWA) spectrum to private sector operators, expected in 2Q10, will open up attractive opportunities for the technology in the country. However, our analysis suggests that WiMAX will only serve a niche market rather than dominating the field.

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In a nutshell

Key messages

High-growth potential for broadband services due to pent-up demand

3G and fixed broadband are not sufficient to meet demand

End-user limitations will make mass WiMAX penetration difficult

Spectrum availability also limits the potential

Restrictions on voice services make the business case unattractive

Ovum view

A medium-term opportunity for operators

Despite 16e deployment, WiMAX is likely to remain a fixed wireless broadband service

Affluent consumers and SMEs are the only viable customer segments

Rural deployment is dependent on government aid

Tata, Reliance, and Sify are likely to remain the leading WiMAX operators

Setting the stage

Current state of play

A complement or a competitor?

WiMAX drivers and challenges in India

Pent-up demand for broadband

Low broadband penetration

Government support to increase broadband penetration

Good economic growth with promising prospects

Inadequate alternatives

Challenging deployment of fixed broadband networks

Limited availability of 3G spectrum

End-user limitations

Low computer penetration

Challenging per-subscriber economics

Scale disadvantages

Waning vendor support

Limited success in other global markets

Regulatory hurdles

BWA spectrum (2.3GHz) availability

Restrictions to offer voice services

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Preference for 16e over 16d in the future
Likely to remain a fixed wireless broadband service
Limited advantage of nomadicity
Broadband access may be the only “killer app”
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