

NOW AVAILABLE

Report on

INDIAN TELECOM SECTOR OUTLOOK

India Infrastructure Research
www.indiainfrastructure.com

INDIAN TELECOM SECTOR OUTLOOK

Road Ahead for 3G, Broadband and Infrastructure

Table of Contents

1. TELECOM SECTOR

- Introduction
- Current Status
- Key Trends
- Future Growth Drivers
- Consolidation and Industry Structure
- Emerging Competitive Landscape
- Investment Needs and Requirements
- Revenues and Profitability
- Evolving Policy and Regulatory Framework
- Forecasts and Projections
- Conclusion

2. TELECOM INFRASTRUCTURE

- Introduction
- Current Status
- Rural Infrastructure Roll-Out
- Key Government Initiatives
- Key Trends
- Growth Drivers
- Emerging Industry Structure
- Emerging Business Models
- Active Infrastructure Sharing
- Revenues and Profitability
- Investment Needs and Requirements
- Evolving Regulatory Scenario
- Issues and Challenges
- Forecasts and Projections
- Conclusion

3. 3G SERVICES

- Introduction
- Current Status
- Future Growth Drivers
- Emerging Competitive Landscape

- Operator Plans and Strategies
- Emerging Business Models
- Pricing Trends
- Technology Choices and Adoption
- Impact on Revenue and Profitability
- Investment Needs and Requirements
- Regulatory Framework
- Issues and Challenges
- Forecasts and Projections
- Conclusion

4. BROADBAND

- Introduction
- Current Status
- Competitive Landscape
- Key Trends
- Future Growth Drivers
- Technology Choices and Adoption
- Issues and Challenges
- Evolving Policy and Regulatory Scenario
- Investment Needs and Requirements
- Impact on Revenues and Profitability
- Forecasts and Projections
- Conclusion

5. APPENDIX

List of Table

Telecom subscribers
Yearly and average monthly mobile subscriber additions
Growth in number of mobile data access users
Wireless telecom operators in India
Wireline subscriber base (All-India)
Yearly Internet subscriber base
Top 10 ISPs in India
Rural vs. urban wireless teledensity
Rural vs. urban subscriber base
Operator-wise proportion of active mobile subscribers in total subscribers
Circle-wise MNP status
Operator-wise MNP status
Select M&A deals in the telecom services space
Operator-wise licence, spectrum, subscriber and operational details
Investment in the telecom sector during the Tenth and Eleventh Plans
Growth in segment-wise revenues
Growth in circle category-wise revenues
Growth in technology segment-wise MoUs (per month per user)
Growth in telecom operator revenues
Growth in net profit of telecom operators
Growth in ARPUs of select operators
Spectrum available for telecom operators in different frequency bands
Key recommendations for policy framework for the Indian telecom industry
PwC's estimates of total telecom subscribers (million) and penetration
Trends in telecom tower and mobile subscriber growth
State-wise tower and BTS distribution
Company-wise tower portfolio
Mobile network coverage of select operators
Status of sites commissioned under the USOF
Collection of UAL vis-a-vis allocation and disbursement of funds from USOF
Commissioning status of towers (IP-wise) as of August 31, 2011 in rural and remote areas
Commissioning status of towers (state-wise) as of August 31, 2011 in rural and remote areas
Details of villages where SMCF will be launched
Roll-out plans for SMCF pilot project
Estimated cost savings resulting from infrastructure sharing
India tower transactions – EV per tower and EV per tenant
Estimated EV/EBITDA of India tower transactions (1 year forward)
Key consolidation deals in 2009 and 2010
Pros and cons of pure capex model
Pros and cons of partial capex model
Pros and cons of partial opex model
Capex required for telecom towers
TRAI's recommendations on issues related to telecom infrastructure policy
Growth of telecom tower industry and demand for diesel
Operator-wise 3G licences, coverage and subscribers
Operator-wise comparison of data download speed on various technology platforms
Decline in mobile handset prices

Service area-wise 3G operators
List of operator application stores and offerings
3G alliances amongst licence-winning operators
Handset bundling offers by operators
Prepaid data packages offered by players in the Delhi circle
Prepaid data package prices offered by players in the Mumbai Circle
Content tariff comparison for different operators
Vendor-wise 3G network roll-out contracts
Operator-wise investment on 3G network roll-out
E&Y's estimates of growth in 3G subscribers
PwC's estimates of growth in 3G subscribers
India Infrastructure Research's estimates of 3G subscribers
Internet and broadband subscribers
Growth of wireless subscribers capable of accessing data services
Operator-wise optic fibre network
Operator-wise wireline subscribers
Service provider-wise internet and broadband subscribers
Herfindahl/Hirschman Index for top 10 ISPs
Operator-wise details of data services as of March 2011
Key players in the enterprise data service market
Operator-wise current status of BWA networks
Segment-wise growth in broadband subscribers
Lowest broadband tariff plan offered by various service providers
Lowest 3G data tariff plan offered by various service providers
Comparative evaluation of deploying broadband technologies in India
Current status of USOF's wireline broadband scheme
Cost of OFC and end equipment
Details of cost of access aggregation and backhaul for all blocks across India
Operator-wise investment on BWA spectrum and network roll-out
Ernst & Young's estimates of broadband subscribers
Wireless and wireline broadband projections by the Government of India
Household coverage required to achieve broadband targets
Wireline and wireless broadband penetration projection
Wireline and wireless broadband subscribers projection
India Infrastructure Research's estimates of broadband subscribers

LIST OF FIGURES

Yearly telecom subscriber additions
Technology-wise monthly mobile subscriber additions
Growth in teledensity
Circle-wise monthly mobile net subscriber additions
Circle-wise average monthly mobile net subscriber additions
Rural vs. urban teledensity
Technology segment-wise mobile subscribers
Total investments in telecom
FDI inflow in the telecom sector
Market share of telecom operators
Private vs. government investment in the telecom sector during the Eleventh Five Year Plan

Growth in telecom sector revenues
E&Y's and OVUM's estimates of growth in wireless subscribers and teledensity
E&Y's estimates of growth in wireline subscribers
Frost & Sullivan's estimates of growth in total subscribers
India Infrastructure Research's estimates of wireless subscribers
India Infrastructure Research's estimates of wireline subscribers
Market share of tower companies
USOF's disbursement towards mobile infrastructure
Growth in telecom towers and tenancies
Tower distribution among tower companies as of April 2009
Tower distribution among tower companies
Tower share of operator-owned and independent tower companies
Emerging business model
RESCO model
RAN sharing
Internal rate of return for tower companies at various tenancy ratios
Ernst & Young's projections for telecom towers and tenancies
KPMG's projections for telecom tower additions
ICF International's tower demand projection
India Infrastructure Research's tower projections
Trends in 2.5G tariffs and subscriber growth
Non-voice revenues as percentage of sales for mobile operators
Public vs private 3G subscriber base
Subscriber market share of 2G and 3G operators
Network operator-centric model
Content aggregator-centric model
Current business model for VAS-offering services
Emerging business model for VAS-offering services
International trends in contribution of non-voice revenue to total revenues of operators
Quarterly non-voice revenue contribution growth for Bharti Airtel and Idea Cellular
Current and projected VAS revenue shares of different players
E&Y's estimates of growth in non-voice revenues
HSBC's estimates of growth in 3G subscribers
Analysys Mason's estimates of 2G and 3G data users
PwC's estimates of 3G penetration
Growth in internet and broadband subscribers
Growth in revenues from enterprise segment
Enterprise data spend as a percentage of total spend
Market share of ISPs
Spectrum under consideration for BWA deployment worldwide
Trends in wireline and broadband subscribers
Broadband (DSL) subscriber's city-wise share for state-owned operators
Estimated cost of optical fibre infrastructure
Comparison with China over internet penetration
Comparison with China over mobile penetration

Release Date: October 24, 2011 No. of pages: 202

ORDER FORM

I would like to purchase the "Indian Telecom Sector Outlook" report for Rs 60,000.

I am enclosing a cheque/demand draft for Rs. _____, vide cheque/demand draft no. _____

drawn on _____ dated _____ in favour of "India Infrastructure Publishing Pvt. Ltd."

Signature

.....
Name (Block Letters) _____

Designation _____

Company _____

Mailing Address _____

Telephone _____ Mobile _____

Fax _____

E-mail _____

Wire transfer details:

Beneficiary	:	India Infrastructure Publishing Pvt. Ltd.
Bank Name	:	The Royal Bank of Scotland N.V.
Bank Address	:	M-6, Hauz Khas, New Delhi 110016, India
Account No.	:	1050338
Swift Code	:	ABNAINBBDEL
IFSC Code	:	ABNA0100327

Contact details:

Upasna Tyagi
Information Products
India Infrastructure Publishing Pvt. Ltd.
B-17, Qutab Institutional Area, New Delhi 110016, India
Ph: 91-11- 46012963(D), 91-11-41034600/01 (B) Fax: 91 -11-26531196
Mobile: 9582852125
Email : upasna.tyagi@indiainfrastructure.com