

TELECOM TOWER INFRASTRUCTURE IN INDIA

Growth Drivers, Emerging Business Models and Future Outlook

❖ [Report \(PDF\)](#)

The Telecom Tower Infrastructure Market in India report will help you to:

- ❖ Assess the telecom tower requirements and emerging opportunities
- ❖ Learn about the various policies/regulations governing the telecom infrastructure space in India
- ❖ Understand the evolving technology scenario and related demand dynamics
- ❖ Gauge the impact of key government programmes and telco plans
- ❖ Gather information on existing and emerging business and revenue models
- ❖ Identify major stakeholders, their current initiatives and future plans
- ❖ Gain outlook for tower and tenancies demand in India over the next few years

Towercos today are playing a significant role in the creation of next-generation digital infrastructure across the length and breadth country. Surge in data consumption, emergence of next generation technologies, and government's thrust on programmes like Digital India and Smart Cities have given the telecom infrastructure providers the opportunity to explore new data-led business and revenue models. As a result, they are strategically moving beyond traditional offerings to tap new business adjacencies in areas of fibre, small cells, Wi-Fi, IoT and data centres. Further, the launch of 5G in India will open up new opportunities, given that the technology would require massive network densification, more towers at short distances, small cell deployment and exhaustive site fiberisation.

Summary and Key Insights

- ❖ State Policies
- ❖ TRAI's Recommendations on Enhancing the Role of IP-1s
- ❖ Policy and Regulatory Gaps
- ❖ Industry Expectations

SECTION I: TRENDS, DEVELOPMENTS, GROWTH DRIVERS AND PROJECTIONS

1. Market Overview and Key Trends

- ❖ Size and Growth
- ❖ Market Structure and Competitive Landscape
- ❖ Impact of Telco Consolidation and Financial Crisis
- ❖ Issues and Challenges
- ❖ Emerging Trends
- ❖ Future Outlook

2. Impact of Covid-19

- ❖ Growth in Data Consumption
- ❖ Trends in Network Usage
- ❖ Demand from Non-urban Centers
- ❖ Impact on Business Operations

3. Policy and Regulatory Developments

- ❖ NDCP 2018
 - Policy Provisions and Objectives
 - Execution Timelines and Status
 - Opportunities for TowerCos
- ❖ National Broadband Mission
 - Provisions and Objectives
 - Execution Timelines
 - Opportunities for TowerCos
- ❖ RoW Rules
 - Key Provisions
 - Implementation Status
 - State-wise Charges

4. Emerging Business Models

- ❖ Active Infrastructure Sharing
- ❖ Neutral Hosts
- ❖ Het-Nets Provisioning and Smart Infrastructure (Fiberisation, Wi-Fi, small cells, etc.)

5. Outlook and Market Projections (till 2025)

- ❖ Key Growth Drivers
- ❖ Data Consumption - Growth Trends and Forecasts
- ❖ Projected Growth in Tower Deployments
- ❖ Projected Growth in Tenancies
- ❖ Opportunities for Tower Companies
- ❖ Industry Outlook

SECTION II: NEW GROWTH AREAS

6. Preparing for 5G - Requirements and Opportunities

- ❖ Tower Site Fiberisation
- ❖ Micro sites
- ❖ Edge Data Centers

(Each segment will give an overview of market size, growth drivers, current status of deployment, future expansion plans and market opportunity)

7. Smart Cities - Experience and Opportunities

- ❖ Role of Telecom Infrastructure
- ❖ Applications and Use Cases
- ❖ Implementation Experience

- ❖ Existing Partnerships
- ❖ Key Completed and Ongoing Projects
- ❖ Upcoming Tenders
- ❖ Future Opportunities

8. In-building Solutions

- ❖ Market size and adoption
- ❖ Key Solutions/Technologies
 - DAS
 - FTTH
 - Small Cells
 - Wi-Fi
- ❖ Operator Deployments and Plans
- ❖ Emerging Business Models
- ❖ Role of Towercos
- ❖ Issues and Challenges
- ❖ Opportunities and Future Outlook

9. Non-core Business Opportunities

- ❖ Smart Poles (IoT sensors, public Wi-Fi)
- ❖ Digital Signage and Advertising
- ❖ EV Charging Infrastructure

(Each segment will cover market size, growth drivers, current and planned partnerships and contracts, and market opportunity)

SECTION III: TOWER DESIGN, ENERGY REQUIREMENTS AND SITE MAINTENANCE

10. Tower Designs, Technologies and Solutions

- ❖ Types of Tower Structures and Key Characteristics
- ❖ Evolving Tower Designs
- ❖ Trends in Materials Used
- ❖ Deployment and Installation Models
- ❖ Global Best Practices and Lessons

11. Energy Management

- ❖ Power Consumption Trends
- ❖ Cost Structure
- ❖ Types and Nature of Energy Sources

- ❖ Energy Efficiency Strategies
- ❖ Trends in Energy Storage
- ❖ Focus on Green Energy
- ❖ Industry Initiatives
- ❖ Future Outlook

12. Site Operations and Maintenance

- ❖ Current Practices and Models
- ❖ Key and Emerging Technology Trends (Analytics, real time monitoring, automation)
- ❖ Focus on Managed services
- ❖ Industry Initiatives and Experience
- ❖ Challenges and Way Forward

SECTION IV: PLAYER PROFILES

13. Key Players

- ❖ American Tower Corporation
- ❖ Ascend Telecom Infrastructure
- ❖ BSNL-MTNL
- ❖ Indus Towers-Bharti Infratel
- ❖ Reliance Jio Infratel
- ❖ Reliance Infratel
- ❖ Tower Vision
- ❖ Others (GTL Infrastructure, RailTel, PowerGrid, etc.)

(Each player profile will give an overview of the company's operations, tower footprint and portfolio, focus areas, key projects, key clients, financial performance, capex and expansion plans)

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