

India: Broadband Situation and Plan for Future

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Agenda

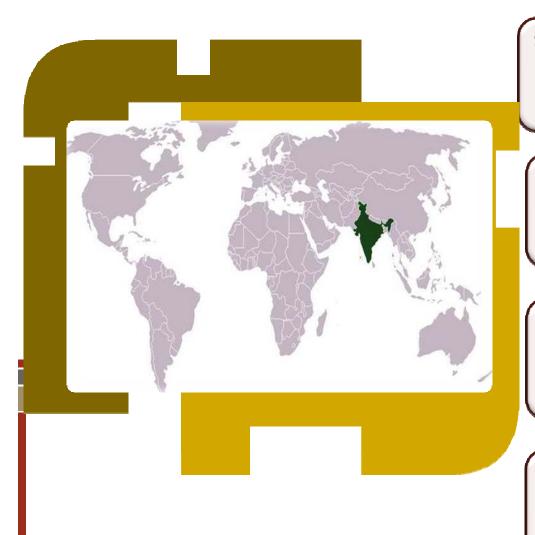
- Overview
- Bandwidth Situation in India
- Focus Areas
- IT Network for e-Governance
- Way Forward





Public services closer home

India: diversity & development



1.2 billion people

Per Capita GNI: US\$1530 (2012)

Per capita GNI (PPP): US\$3840 (2012)

Multi-lingual — 22 Official Languages

Multi religious

Multi-ethnic

Federal Structure

35 States & Union Territories

70% Rural, 600,000+ villages

Multi-party

Multi-tiered democracy

250,000+ Local Bodies

India: Overview

India

Connectivity

Challenges

Path Ahead



1/6th of world popl.

4th largest economy

High economic growth

Major thrust on services

Young population

IT sector: >US\$100b



Total subscribers-899m

Broadband subscribers-15.36m

Rural teledensity – 41.7%

Private players' market share: 88.3%

Lowest rates in the world

8 wireline and 13 wireless TSPs



Fragmented & nonoptimal utilization of infrastructure

Need for huge capacity building

Increased cyber security threat

Last mile reach

Scaling up for 1 billion potential customers



Unified ICT infrastructure

Broadband infra in every village

Holistic strategic control

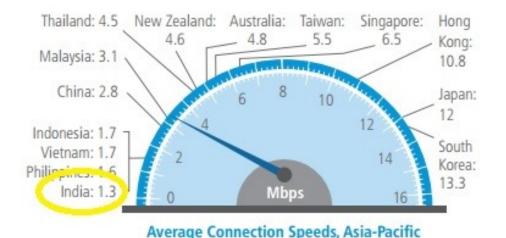
Unified IT network for e-Governance.

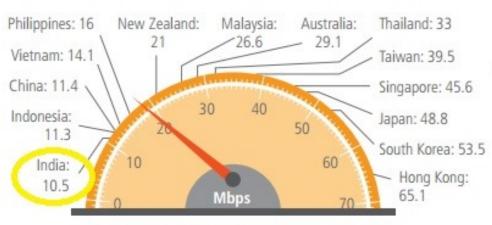
Efficiency & Reliability in service delivery

Source: Trai Report-Nov 2013



India: Current Status in Asia Pacific Region





Average Peak Connection Speeds, Asia-Pacific

3.3_{Mbps} Global Average Connection Speed

Global Average Peak
Connection Speed

More Users than all countries together (excluding China)

Low penetration in rural areas accounting for 70% of population

Scaling existing as well as creating new infrastructure to meet citizen expectations

http://trak.in/tags/business/2013/ http://www.akamai.com/stateoftheinternet/

https://www.yunbaogao.cn/report/index/report?reportId=5_6049

(>10Mbps) Connectivity Rating

n	% Above 10 Mbps	QoQ Change	YoY Change
	45%	-8.6%	-6.5%
	43%	5.8%	18%
	32%	-1.9%	23%
	13%	-1.0%	87%
	8.3%	105%	152%
	5.1%	26%	8.1%
	3.9%	17%	66%
	2.1%	39%	120%
	2.0%	50%	65%
	1.196	141%	731%
	0.2%	-22%	37%
	0.1%	-8.8%	24%
	0.1%	15%	-7.7%
	0.1%	-14%	-7.6%

Low Penetration in Rural areas

Heterogeneous environment

Growth expected after all initiatives planned are implemented



internet/