



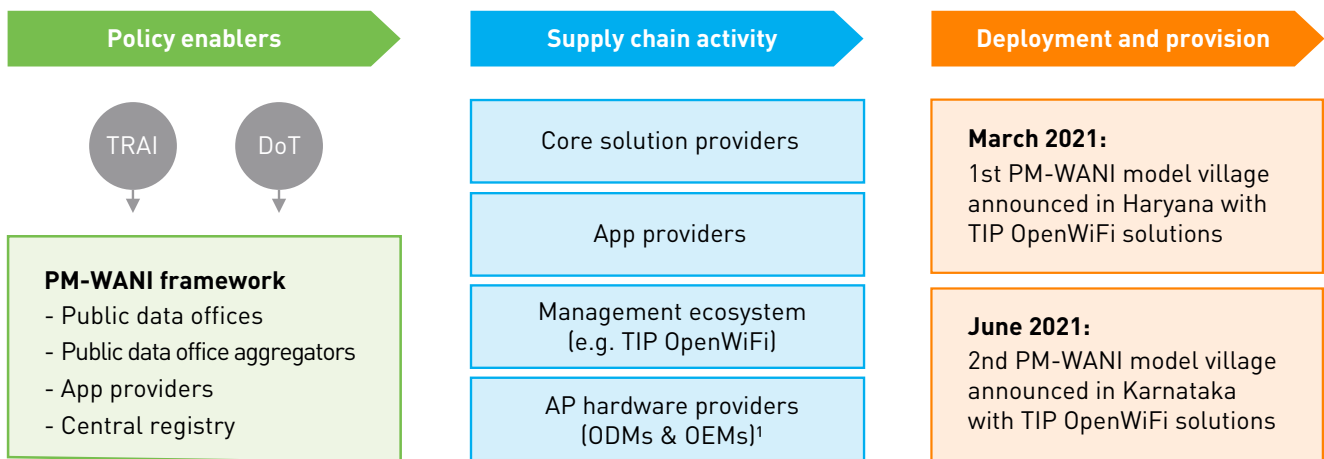


# In India, multiple stakeholders in the telecoms networking sector are actively driving the development of a diverse supply chain ecosystem

MANY POTENTIAL FACTORS FOR SUCCESS ARE IN PLACE FOR THE OPEN NETWORKING ECOSYSTEM IN INDIA TO ACHIEVE SIGNIFICANT GROWTH

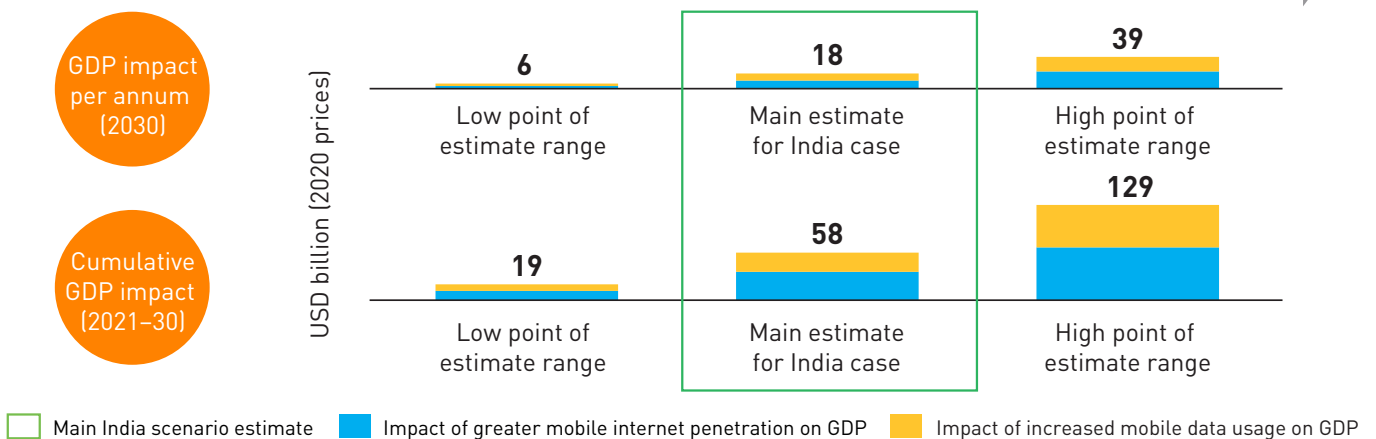
Factors	Present?	Ongoing developments
 Operator interest	✓	- Main MNOs are exploring use and development of open solutions - Other connectivity providers are engaged in open industry initiatives
 Supply chain investment	✓	- Investments by home-grown vendors, manufacturers, system integrators - Interest from global incumbents in boosting production in India
 Industry collaboration	✓	- Local industry bodies such as TAIPA are encouraging enabling policies - Active international initiatives such as TIP
 Government support	✓	- Production-linked incentive (PLI) scheme for telecoms network equipment manufacturing - Prime Minister Wi-Fi Access Network Interface (PM-WANI) scheme

## CASE STUDY: COMPANIES IN INDIA ARE CAPITALISING ON THE PM-WANI FRAMEWORK AND INDUSTRY INITIATIVES TO LAUNCH OPEN AND DISAGGREGATED SOLUTIONS FOR WI-FI



## CASE STUDY: OPEN RAN IS EXPECTED TO SEE ACCELERATED ADOPTION IN INDIA COMPARED TO OTHER COUNTRIES,<sup>2</sup> AND COULD GENERATE SIGNIFICANT GDP GAINS<sup>3</sup> OVER THE NEXT DECADE

Level of success of the Open RAN ecosystem driven by industry, policy makers and initiatives like TIP



<sup>1</sup> 'AP' refers to access point; 'ODM' refers to original design manufacturer; 'OEM' refers to original equipment manufacturer

<sup>2</sup> Compared to the low-income country group in the global report, India is expected to experience more rapid adoption of Open RAN solutions given operator announcements to develop and deploy solutions that are

understood to be open and interoperable

<sup>3</sup> Measured in USD billion (2020 prices), with estimate range developed based on a similar methodology used in the global report, by adjusting efficacy and adoption parameters relative to the main India scenario estimate