



INDIA'S

5G

ROLLOUT

Revolutionizing the People Supply Chain

**JUNE
2023**


TeamLease®
Putting India to Work



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PREFACE

As India marches forward on its mission to improve connectivity and ensure mobile coverage across the country, the pervasive rollout of 5G networks offers to unleash immense opportunity for economic growth and development. It is estimated that 5G will deliver **\$13.2 trillion** in global economic value by 2035 and generate **22.3 mn jobs** in the 5G global value chain. 5G technology is expected to benefit all be it individuals, MSMEs, or corporate behemoths. It will serve to democratize access to knowledge and information which in turn will lead to a significant boost in Employment in Agriculture, Construction, Utilities, Manufacturing, Transportation and Warehousing, and Educational Services.

India is currently the world's 2nd largest telecom market with **1.17 bn** subscribers. It is estimated that the number of 5G subscribers in India will grow to **0.6 bn** by the end of 2028 expanding the coverage of mobile subscriptions, which are expected to grow from **77%** in 2022 to **94%** in 2028. The 5G promise of super-high-speed and ultra-low latency will facilitate the digital transformation of the country and lead to the creation of a plethora of jobs within and beyond the telecom industry. The implementation of 5G in the country will blur geographic boundaries and help to connect people to jobs, and skills to employment opportunities irrespective of physical location.

The penetration and proliferation of 5G is expected to surpass anything we have seen in older technologies and may well exceed all our expectations leading to phenomenal growth. For customers and service providers, 5G is a trending technology that is in high demand worldwide. While users are excited about the use and experience that 5G technology will offer, service providers are equally enthusiastic about delivering next-generation technologies through their networks. However, from a technology perspective, a lot still needs to be done and considered to produce the desired outcomes. From an economic perspective, 5G is promises to create direct and indirect jobs that will help unleash a new wave of job prospects in the near future. Given the incredible job opportunities before us, this report seeks to assess the level of 5G preparedness based on the survey undertaken by people in leadership and senior executive roles. This will help us gauge the impact of 5G on job creation, particularly for tech talent, and the need to engage in upskilling and reskilling initiatives to create a future-ready workforce.

This report analyses crucial questions about the current state of the telecom infrastructure in the country, and what is required to ensure a future-ready telecom workforce. It also delves into the impact of 5G on the future of work, with specific focus on the job profiles, skills and upskilling initiatives that will be required for businesses and industries to make this highly valuable transition quickly and efficiently.

Kartik Narayan

CEO - Staffing





EXECUTIVE SUMMARY



India with its rising population presents a positive growth outlook and is among the fastest growing economies in the G20. Mobile networks have a pivotal role to play in driving India's growth story. The realization of India's digital, social and economic inclusion goals are dependent on the expansion of 5G across the length and the breadth of the country. The rapid rollout of 5G technology is gathering momentum and will soon enable the country to unlock phenomenal technological and economic advantages. The deployment of 5G is set to transform industrial and economic capabilities across industries and improve access to employment for all our people defying geographic boundaries. 5G technology is also expected to revolutionize the service industry to drive efficiency and create a better experience for customers.

The rollout of 5G technology will facilitate the digital transformation of businesses and lead to the creation of a wide plethora of new job opportunities within and beyond the telecom industry. However, it is in our interest to prepare well for the onset of this technology by anticipating future needs of the workplace and equipping our workforce with these skills. Therefore, to conclude in the words of Sean Gerety, the litmus test of technology lies not in the technology itself, but rather in what you do with it, for

“
THE TECHNOLOGY YOU USE IMPRESSES NO ONE.
THE EXPERIENCE YOU CREATE WITH IT IS EVERYTHING.
”

We may witness considerable improvements when 5G technology becomes available in a number of industries, including telecommunications, healthcare, transportation, and more. Faster internet speeds, lower latency, and increased network capacity offered by 5G will enable seamless communication and spike innovation. It has the ability to transform industries and increase productivity by strengthening digital infrastructure of the country. IoT will see major penetration across industries enabling them to monitor and strengthen productivity.



Mahalingam Subbian | Vice President | Telecom | TeamLease Services

HIGHLIGHTS OF THE REPORT



1

5G will eventually lead to reduced economic inequality, job growth, and better jobs. It will **significantly boost employment in Agriculture, Construction, Utilities, Manufacturing, Transportation and Warehousing, Educational Services, etc**

5G networks in India will provide higher bandwidth and lower latency relative to its predecessors, 4G and 3G. 5G is expected to offer top data speeds of up to 10 Gbps and latency of less than a millisecond

2

3

The grand entry of 5G can only be achieved when the network is supported by adequate telecom infrastructure. According to a report by CRISIL, the telecom industry requires an investment of INR 1.5-2.5tn in the next 3 years for the development of infrastructure to facilitate the smooth rolling out of 5G services

An INR 120bn is already set to come into the Telecom sector through the PLI scheme, of which about 25% will go into creating new jobs, generating the momentum needed towards a greater number of employment opportunities in this sector

4

5

IT and Banking and Financial Services would be among the leading beneficiaries as per our survey results. The other sectors which will be significantly impacted by the 5G are BFSI (60%), Education (48%), Gaming (48%) and Retail and ECommerce (46%)

The **in-demand 5G skills** as per our survey respondents are:
Cloud Infrastructure Engineers, cybersecurity experts, and data science specialists

6

7

A large majority of 88% employers feel that upskilling and reskilling existing employees is the way forward towards closing the impending demand-supply gap in the telecom industry

8

Golden opportunity for young technical graduates as over 97% employers commit to paying a premium to recruit qualified freshers in a 5G-related role

9

Building a diverse and inclusive workforce is increasingly a priority across industries, and telecom is no exception. However, 5G by transcending boundaries opens up a wide array of opportunities defying barriers of geography, gender and race

10

The roll-out of 5G offers huge potential for growth and transformation for the Indian economy which must be leveraged in a planned and systematic manner to realize its full potential





5G Era on the Horizon

Technology has made our life easy and extended many advantages which we could never have imagined before. The positive impact of Industry 4.0 has resulted in the emergence of new technologies that have paved the way for the wide-scale deployment of 5G. The extensive transformation witnessed with the availability of mobile wireless networks in the country over the past two decades sets high expectations to unleash new economic opportunities and potential as an emerging leader in 5G tech soon. Furthermore, the key functional driving factors of 5G promise to unlock new market/business opportunities and lead to the optimization of service delivery and end-user experience.



It is estimated that 5G will deliver \$13.2 trillion in global economic value by 2035 and generate 22.3 million jobs in the 5G global value chain. Importantly, global 5G mobile subscriptions are envisioned to reach 5000 mn by the end of 2028.

This modern-day network will impact everything in the world. The implications are enormous, and the possibilities seem endless. From factories to robotics to self-driving cars, 5G will eventually lead to reduced economic inequality, job growth, and better jobs. It will significantly boost employment in Agriculture, Construction, Utilities, Manufacturing, Transportation and Warehousing, Educational Services, etc.

'According to the report of 'Unfolding India's Era of Digital Convergence' by NASSCOM, the 5G network technology is expected to contribute about 2% to the country's GDP amounting to \$180 billion by 2030. It is further quoted that energy and utilities will be the key driver of 5G, contributing about 30% of the expected \$180 bn potential, followed by retail at 20%, healthcare at 15% and manufacturing at 10%.



India, with its favourable demographics, has a relatively high productive age as 50% of its population is below the age of 25, and the average age of the population as a whole is 28.7 years compared to 38.4 years in China and 48.6 years in Japan. With such an advantage, the massive adoption of 5G, along with the exponential surge in data usage, offers immense chances of the rapid growth of telecom consumption. As per the statistics of the Ministry of Statistics and Broadcasting -



the country has over 1.2 billion mobile phone users and 600 mn smartphone users. It is estimated that the number of 5G subscribers in India will grow to **690mn** by the end of 2028 from a mere **31mn** in 2022. Tremendous growth trends indicate a **53%** rise in mobile subscriptions by the end of 2028. India, as a percentage of total mobile subscriptions, is projected to grow from **77%** in 2022 to **94%** in 2028.

Good internet speed and the mass affordability of high-speed data are among the factors that boost an overall high rate of data consumption.

AVERAGE DATA TRAFFIC PER SMARTPHONE IN THE COUNTRY IS THE HIGHEST IN THE WORLD

It is projected to grow around 54 gigabytes (GB) per month in 2028 at a CAGR of 14%. Total mobile data traffic in the country is estimated to increase to 53 exabytes (EB) per month in 2028 at a CAGR of 19%. The exponential surge in these data points to the high growth in smartphone users and the increase in average usage per smartphone.





India's Tryst with 5G



India is the world's 2nd largest telecom market with **1.17bn** subscribers



2nd highest internet subscribers globally with **824mn**



617 GB of monthly consumption of data per user setting down **50%** of growth in 5 years



Promises to double employment opportunities from **4mn** to **8mn**



Tele-density is **85.11%** - Urban teledensity is at **134.78%**, and Rural teledensity is at **58.37%**



Second highest number of mobile apps downloads in the world with over **27bn** downloads.



6% contribution to the GDP by telecom sector

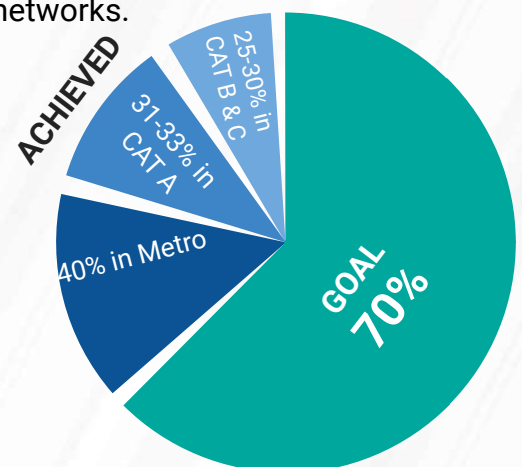


State of 5G infrastructure in India

The grand entry of 5G is expected to bring a considerable increase in speed, and low latencies and enhance network capabilities. However, these can only be achieved when the network is supported by adequate telecom infrastructure. According to a report by CRISIL, the telecom industry requires an investment of INR 1.5-2.5 tn in the next 3 years for the development of infrastructure to facilitate the smooth rolling out of 5G services. As a result of the massive capex required by the Telco players to build the 5G infrastructure and buy spectrum, there is an expected increase in prices. 5G networks in India will provide higher bandwidth and lower latency relative to its predecessors, 4G and 3G and it will use new radio technology and a different architecture for the network to achieve this. 5G is purported to have top data speeds of up to 10 Gbps and have latency even lower than a millisecond. 5G networks can be sliced into multiple private networks, which will give it a massive use case for companies and enterprises who want their own private 5G networks.


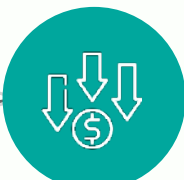


GOAL: National Broadband Mission's objective is to fiberize 70% of Base Transceiver Stations (BTS) by 2025 which involves covering over 3 lakh km pan-India during 2023-2025.

CURRENT STATUS: As of June 2022, fiberization was at 35.11% owing to great variations in the pace of implementation: 40% in the metro, 31-33% in CAT A circles and 25-30% in some CAT B and CAT C circles.





Significant Reasons for Slow Pace of Fiberization

-  Right of way (ROW) cost - The government has initiated steps to maintain uniform ROW cost across circles, as the huge price disparity is a major roadblock
-  High reliance on imports for BTS reduces fiscal and appreciate dollar
-  Mandate rolling out of 5G services at least in one city by the first year, the benefit of cost savings can be realised only in 2024
-  Industry readiness is at nascent stage, especially with respect to MSMEs



Impact of 5G on the Future of Work

It is expected India's 5G adoption will be less than 10% of its user base by 2025, however, the new wave of digitization and demand for high speeds due to the shift to hybrid work may quickly change that.

Regardless of which forecast one wishes to believe, the human capital investment to get to 5G is going to be massive. The advent of futuristic technologies like AI and IoT holds tremendous promise for India and for the world – these and several other new use cases like AR (Augmented Reality) and such have been banking on the super-high-speed and ultra-low latency that 5G promises even before COVID-19. Now, with the digitization strategy providing a never before witnessed appetite from both public and private sectors to try new innovations, many more use cases that need 5G are likely to become mainstream faster – this only means that the penetration and proliferation of 5G is going to surpass anything we have seen in older technologies and may exceed any adoption forecasts.

The Telco industry will hence confront a surge in network traffic volume through an unprecedented proliferation of connected devices, new customers, and new use cases – both B2B and B2C. This will bring a myriad of operational challenges that the industry needs to be ready for. Telcos are set to face a double whammy with more complex infrastructure management with almost 50% more frequency bands for 5G alone than 2G, 3G and 4G combined!

Over the past two decades, we witnessed the Telecom sector connecting more people by penetrating every corner of the country. But the upcoming challenge is the biggest Telcos have faced yet, however, it also brings along with it tremendous opportunities – for Telcos, Service providers like SaaS companies, and the country as a whole, creating along the way a tsunami of jobs - jobs to enable 5G, jobs to manage 5G, and jobs for services enabled by 5G.

But that is only the tip of the iceberg. The implementation of 5G in the country needs millions of skilled and semi-skilled workers, and the OTT services enabled, as a result, will create an even larger set of roles across almost all industries.

An INR 120bn is already set to come into the Telecom sector through the PLI scheme, of which about 25% will go into creating new jobs, generating the momentum needed towards a greater number of employment opportunities in this sector.

Survey Findings

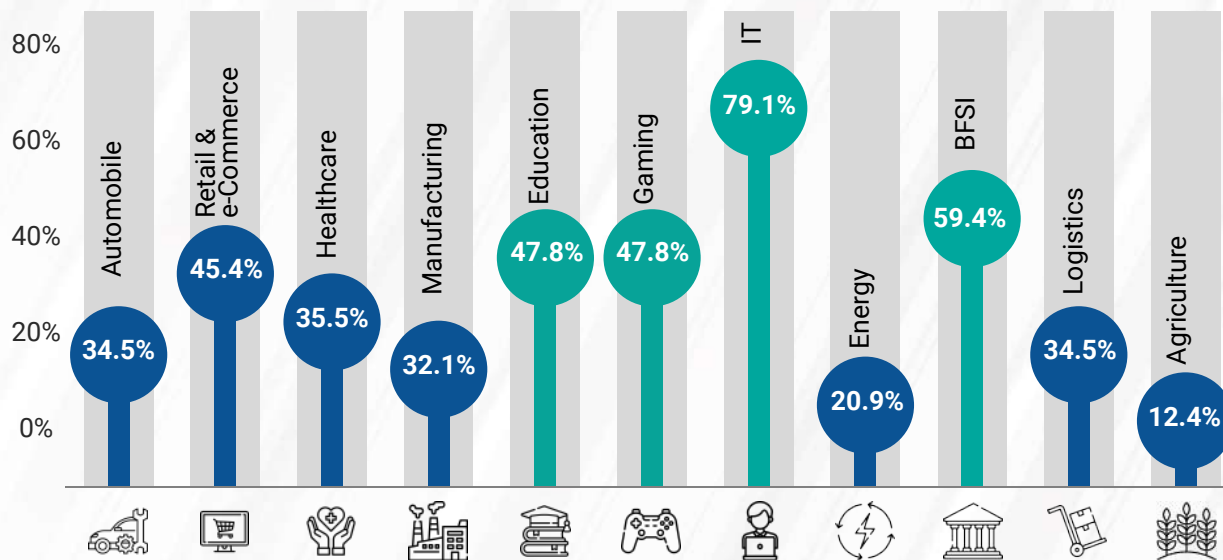
5G is opening its wide arm with opportunities to enable a future of massive data across major Industries, seamless IoT and many more. To explore the 5G readiness in some of the major industries, the 5G impact on job creation especially in the tech talent and upskilling and reskilling of the future-ready workforce, TeamLease Services rolled out a survey with those who are in the leadership and senior managerial roles.

Industries Benefit the Most from the Realisation of 5G

5G network infrastructures being faster and offering much lower latencies than its predecessor, it will provide a huge boost for data-intensive products and services, which will require an increase in the data storage and processing capabilities. Due to 5G networks delivering higher peak data speeds, lower latency, more reliability, increased network capacity and increased availability, the information and communication industry are expected to gain a lot. 5G networks have immense potential and benefits across industries.



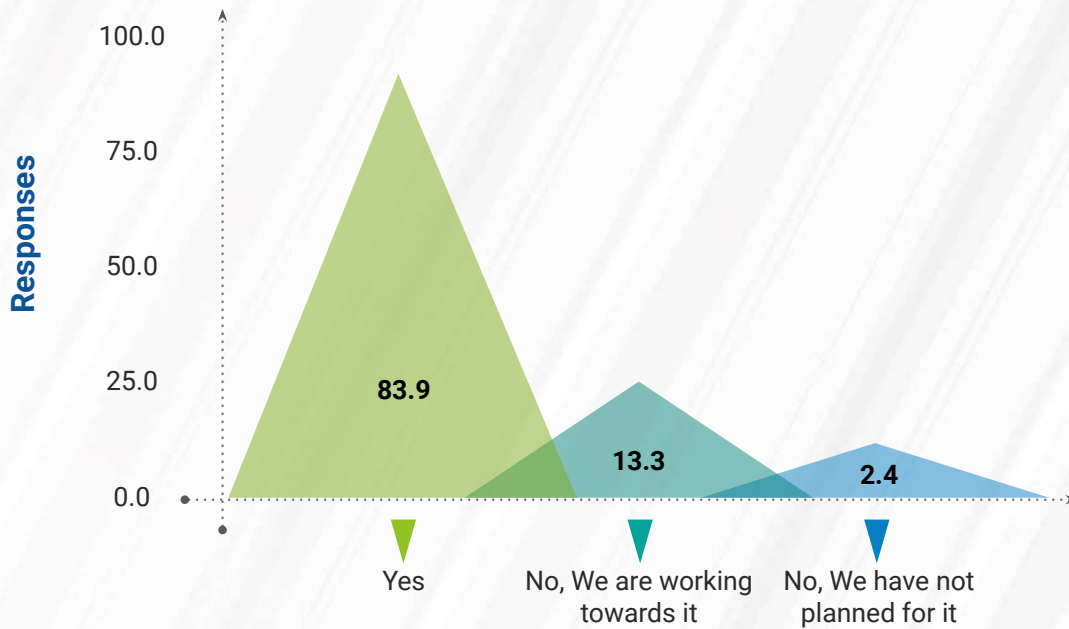
Industries using 5G networks have the ability to cope with the increasing demand for company data and generation. By enabling the networking capabilities of its many components, 5G has the potential to revolutionize industrial automation. The network can be applied to track goods and materials in manufacturing companies as well as immersive remote operations related to service, maintenance, and assembly. A lot of capabilities for the fifth-generation mobile network. Industries can innovate and improve through 5G.



IT and Banking and Financial Services would be among the leading beneficiaries as per our survey results. Almost 80% of respondents believe that IT will be one of the industries to benefit the most from the rolling out of 5G in our country. The other sectors which will be significantly impacted by the 5G are BFSI (60%), Education (48%), Gaming (48%) and Retail and e-Commerce (46%).



Business Readiness for 5G

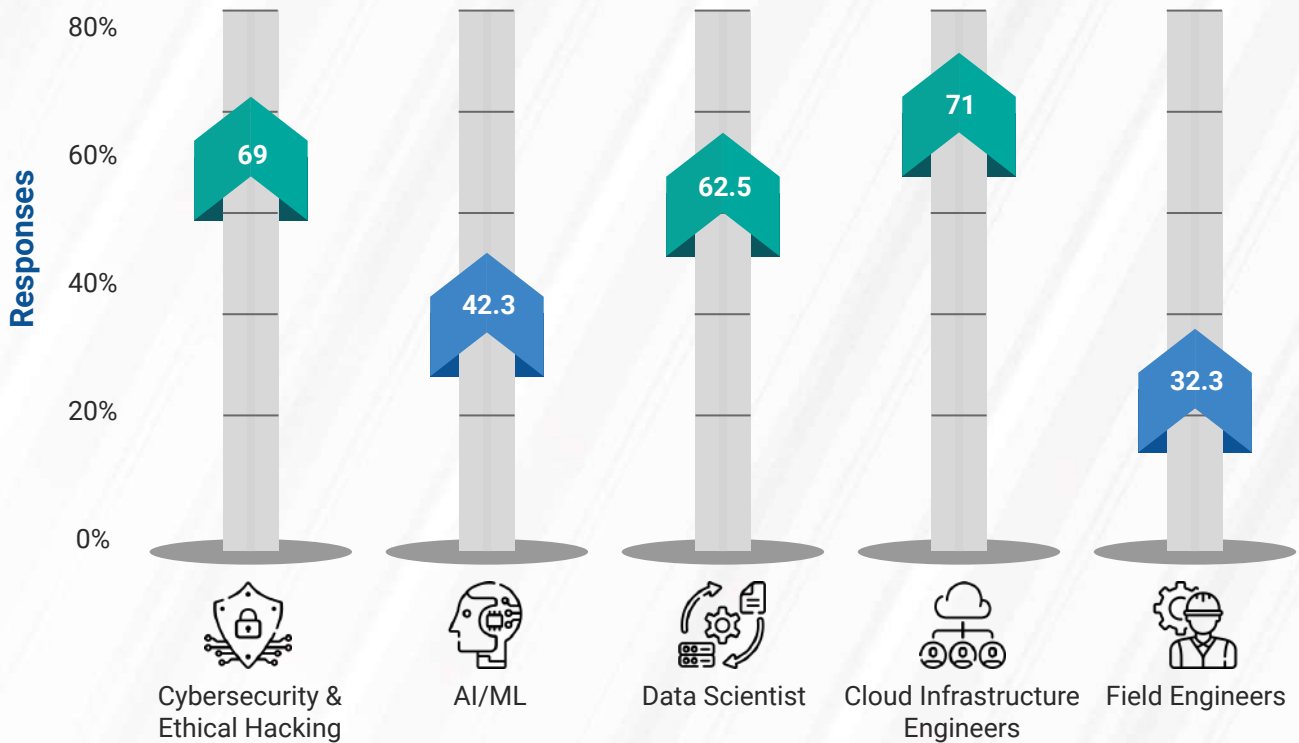


5G can play a significant role in helping companies to optimize their operations and drive innovation. A significant 83.9% of the respondents surveyed indicated 5G readiness in their organizations, and another 13.3% professed progress in that direction. Only a small minority of 2.4% of the respondents indicated that they had yet to plan for the incorporation of 5G in their business plans. These promising data points thus illustrate favourable conditions for the success of 5G implementation in the country.



The In-demand 5G Skills

The rise of 5G in the near future will culminate in increasing digitization across all aspects of operations. It will revolutionize all facets of life, be it education, financial services, business or manufacturing. However, the promise of proficiency and efficiency also carries with it the burdens of implementation, security and analysis thus leading to high demand for roles in each of these fields.



Cloud Infrastructure Engineers are the most voted skill and role requirement, with 71% of respondents mentioning it as one of the roles required for 5G applications, cybersecurity and data science are close second and third with 69% and 62%, respectively.

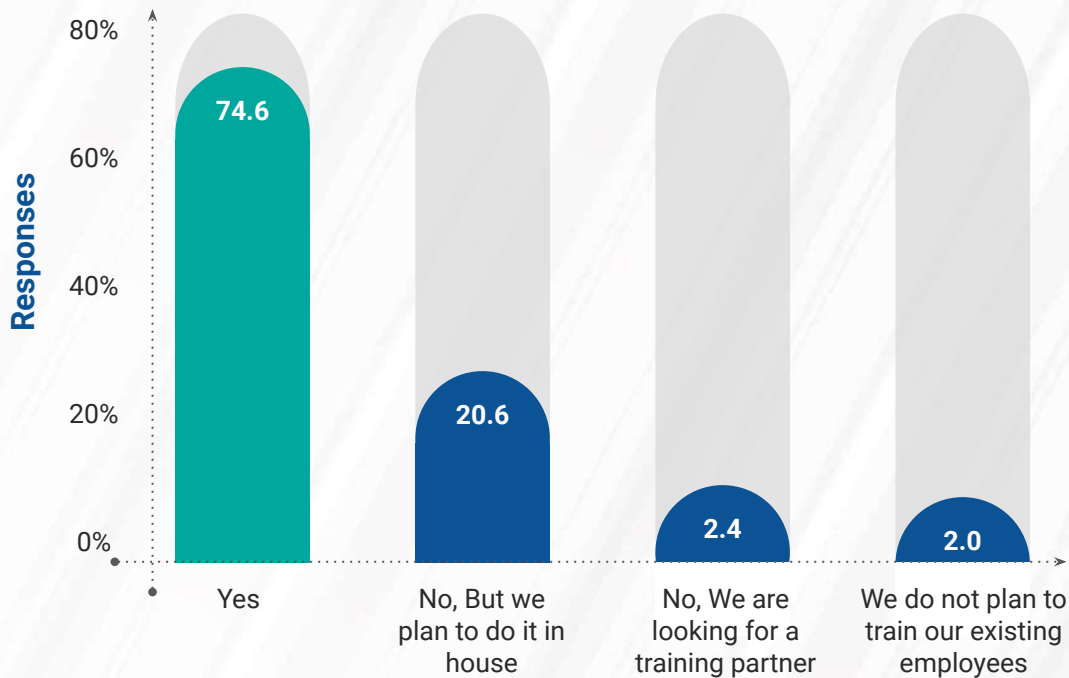
These skills and roles are all required to cater to 5G; however, survey respondents deemed cloud infrastructure to be the most favoured requirement. With the rollout of standalone 5G networks, the cloud faces a renewal of purpose. 5G will enable mobile devices to easily transfer large volumes of data. The cloud and its various architectures (hybrid, on-premises, and public) will be necessary to manage the increase in storage needed for these devices to house the onslaught of data.

Its anticipated benefits to digital business transformation as a consequence of its impact on cloud computing are already shining through. Bringing together long-talked-about technologies in a collective push, the marriage of 5G and the cloud promises to launch many paradigm shifts in operational efficiencies for businesses while at the same time overseeing the convergence of mobile and enterprise networks, server platforms, emerging technologies, and the business of IT itself.



Building Vital Skills for the Future of Work

In the last two decades, telecommuting has increasingly been an option for knowledge workers, thanks to advances in technology. But because remote work typically requires access to reliable, high-speed Internet, such work has often been limited to home offices or co-working spaces. With 5G's enhanced speed and reliability, that will change. Assuming flexible work becomes more common with 5G, talent acquisition and job-search practices will be affected. So, employees must upskill as early as possible in order to have an edge in the 5G-related field.

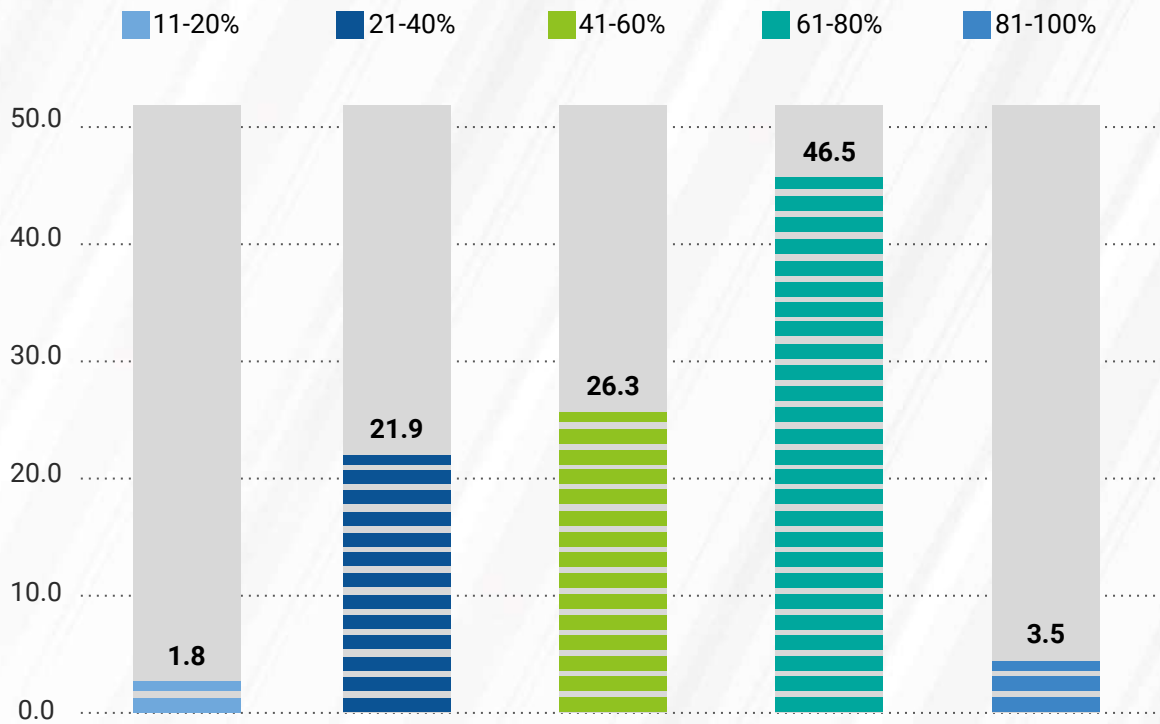


Survey results indicate that the climate is ripe for the implementation of 5G, and employers are prepared to invest in the skill development of their workforce. A large section of 74.6% of the respondents indicated they are in the process of upskilling their current employees to handle future roles involving 5G applications. In comparison, another 20.6% indicated a willingness to introduce in-house programs in the near future, while only 2% said that they had no plans to upskill their existing workforce.



Vision for the Next Generation Future Workforce

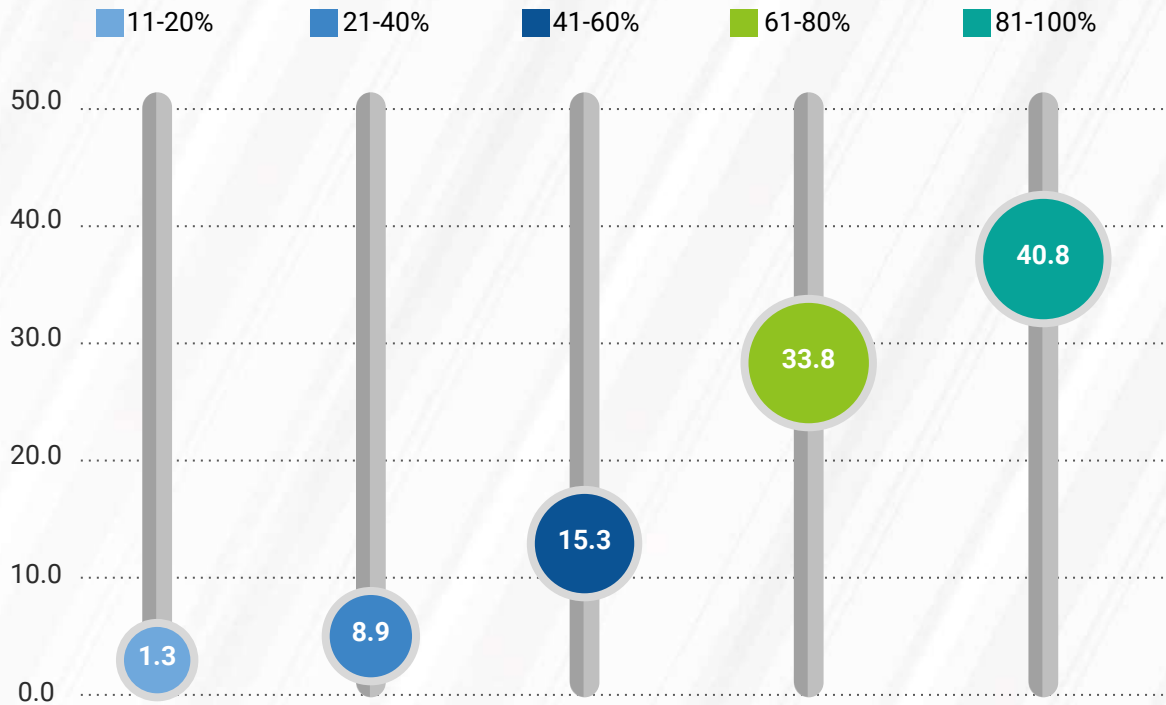
5G Rollout Impact on Job Creation Over the Next 1 Year



No doubt that 5G telecom jobs see growth but not immediately. Responses to the survey on the impact of job creation over the 1st year are quite optimistic. 46% of the respondents opined that the impact of 5G rollout on job creation would probably be between 61-80%, and 26% and 21% of respondents mentioned that the impact on job creation would be between 21-40% and 41-60% over the next one year.



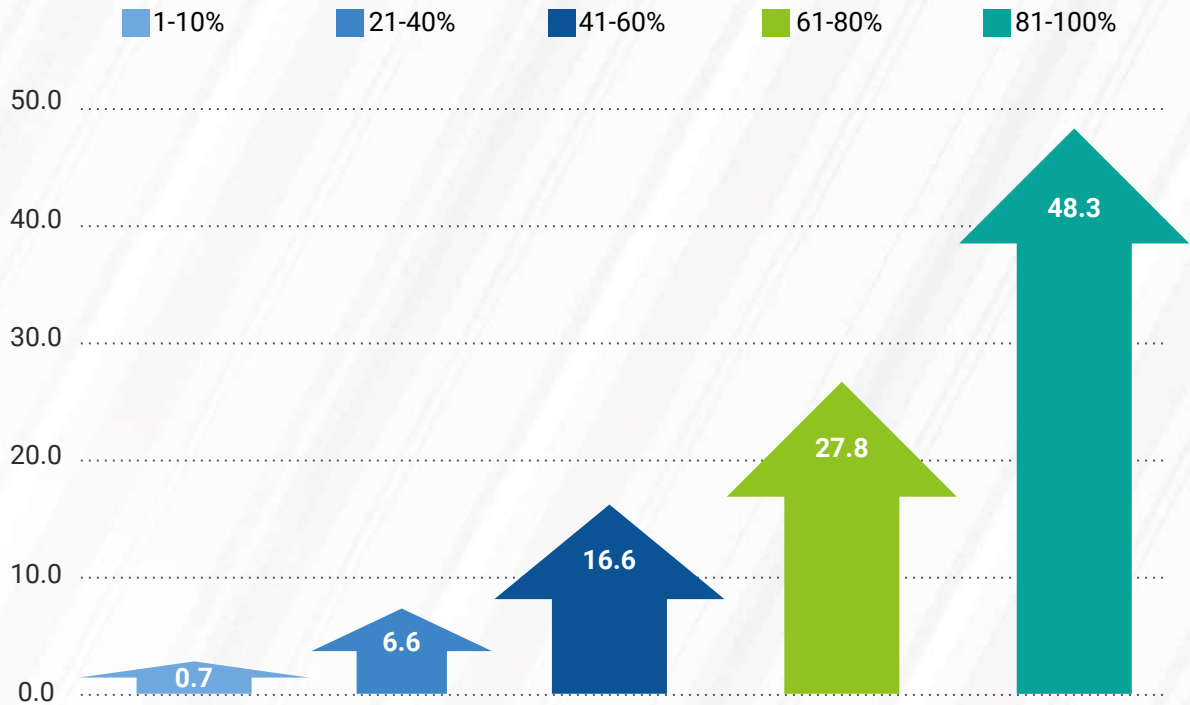
5G Rollout Impact on Job Creation Over the Next 3 Years



Similarly, there is a positive trend in terms of impact on job creation over the next three years. 40% of pollees are of the view that more than 80% 5G rollout impact job creation, and 34% of respondents felt that more than 60% of the effect on job creation leads to tremendous job opportunities over the next three years.



5G Rollout Impact on Job Creation Over the Next 5 Years



To envision 5G in the next five years, it is very important to understand the growth opportunities and existing resources for any organisation. Close to 50% of respondents are of the opinion that the rollout of 5G would definitely impact 81-100% on job creation. Similarly, 28% of the participants in the poll mentioned that it would impact job creation between 61-80%.



5G Rollouts Boost Demand for Tech Talent with Niche Skills

The rollout of 5G will be a boon for tech talent in India, especially



Networking Engineers



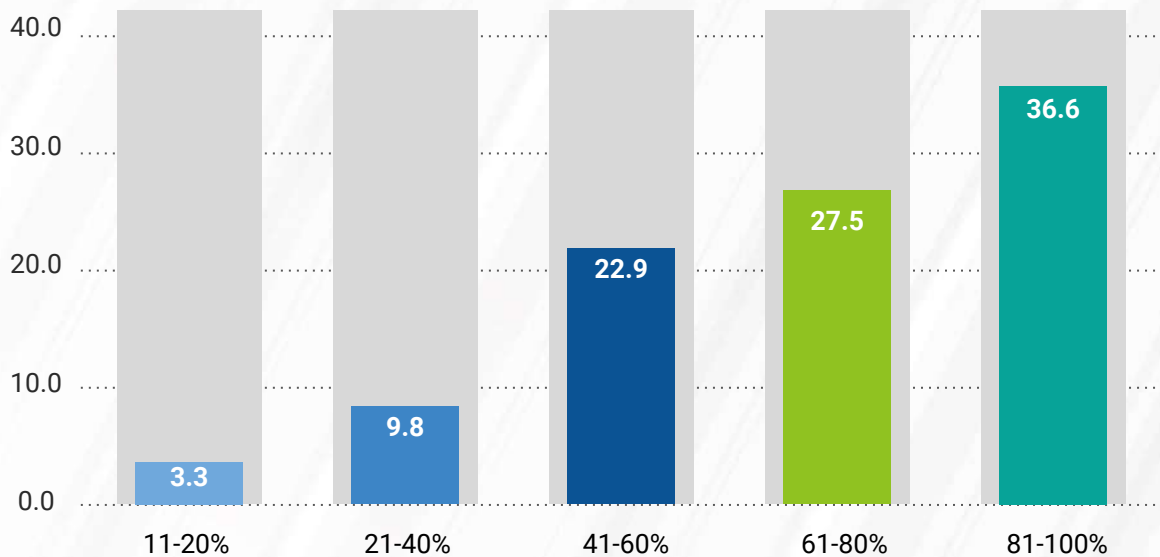
Cloud Computing Experts



User Experiences Designers and Testers



Data Scientists and Cyber Security Specialists

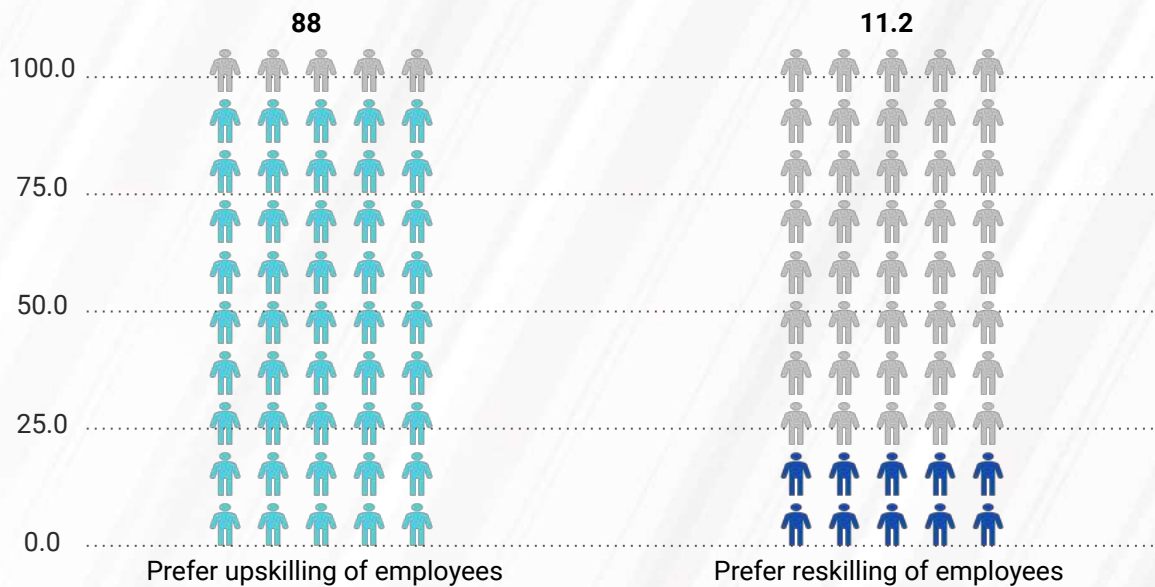


37% of survey respondents responded that more than 80% of tech-related jobs would be created in the near future due to the rollout of 5G. Telcos are expected to recoup some of its investment by integrating 5G solutions for companies which may probably result in more hiring of tech-related roles. There are a lot of emerging opportunities in network upgradation and migration, IoT/IIoT, mobility, network infrastructure and network security, which may, in turn, contribute to more demand for specific roles like technical content writers, networking engineers, AI/ML professionals, UX designers, cloud computing engineers, cyber security specialists, data science and analytical experts etc.



Upskilling is Better than Hiring for Future Roles with the 5G Application Rollout?

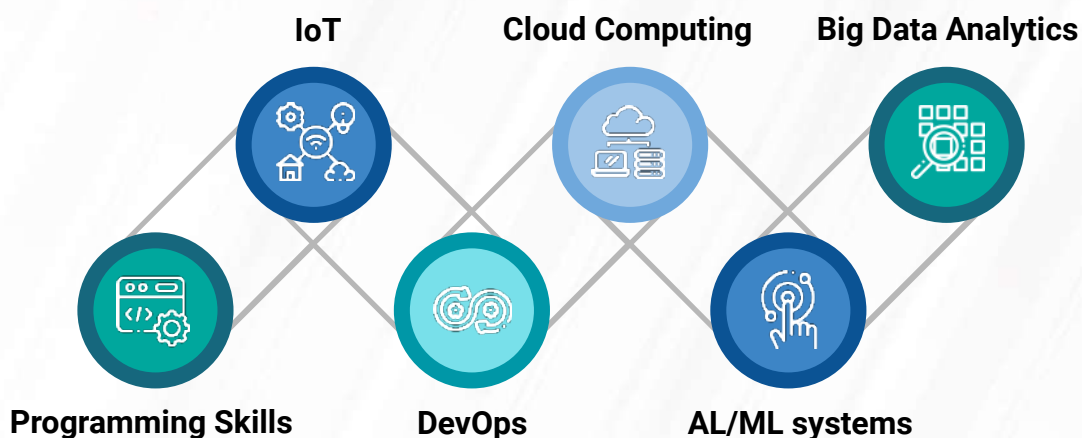
According to the report from the Telecom Sector Skills Council (TSSC), India needs at least 22 mn skilled manpower by 2025 to reap the benefits of 5G, and the demand-supply gap stands at 28%. There is a huge requirement for the upskilling and reskilling of the current manpower in the telecom industry.



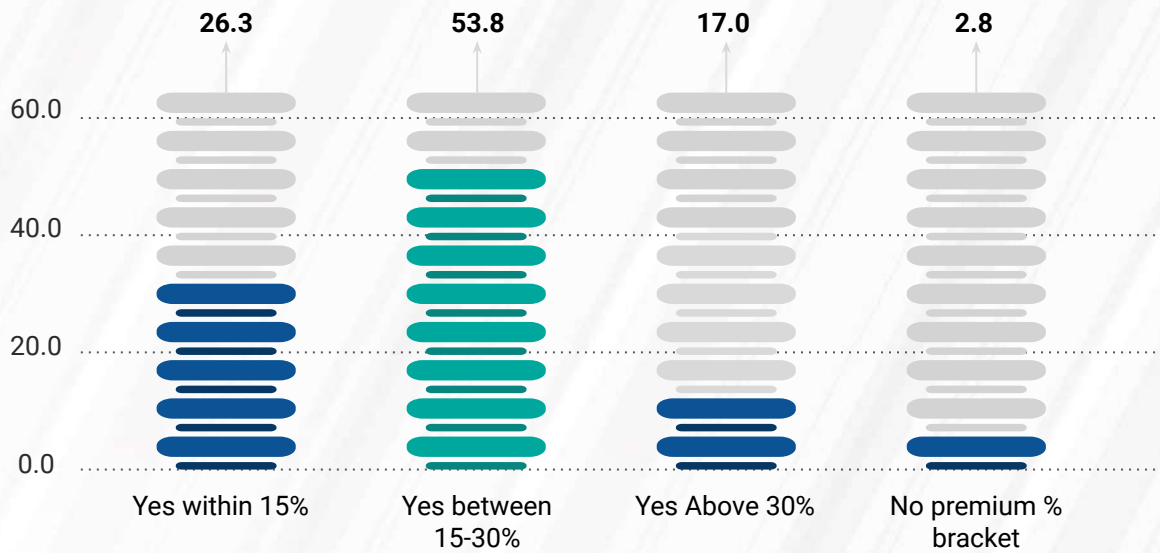
Employers prefer not to hire employees but rather focus on upskilling and reskilling their existing talent pool. 88% of survey respondents opt for upskilling employees rather than hiring new ones for emerging new roles. 5G-specific job roles are critical for any industry in general and the telecom industry in specific. With a sizable current skills gap and a swift development of the 5G talent ecosystem, companies are grappling to meet the demand surge. However, **the transition phase from 4G to 5G needs minimal skill enhancement**, and thus, upgrading the existing workforce with niche skills is the need of the hour.

The transition from a traditional IT role to a 5G-related role requires multiple training phases to adapt to 5G gen and to empower the existing workforce with 5G-ready skills.

Top 5G skills in Demand



Percentage Premium for a Fresher in a 5G-related Role



Almost all employers are willing to pay a percentage premium for freshers in a 5G-related role. Witnessing a high demand for these roles as most employers are ready to shell out a premium of upwards of 15% for employees with 5G-related skills, which is a tremendous opportunity in the job market for freshers.





Next Course of Action

The industry has undergone a tremendous metamorphosis and is responding to the rising demand from across industries such as e-commerce, education, fintech, healthcare, education and consumer data availability in extending more digital services to the target users are bringing new and innovative ease of access. **Integration of emerging technologies such as AI, IoT, 5G and advanced data analytics has the potential to change the entire ecosystem of the telecom industry and set a path to march towards the fourth industrial revolution.** Furthermore,

a 120bn boost from the PLI scheme is also expected to bring more than US\$0.40 billion in investments

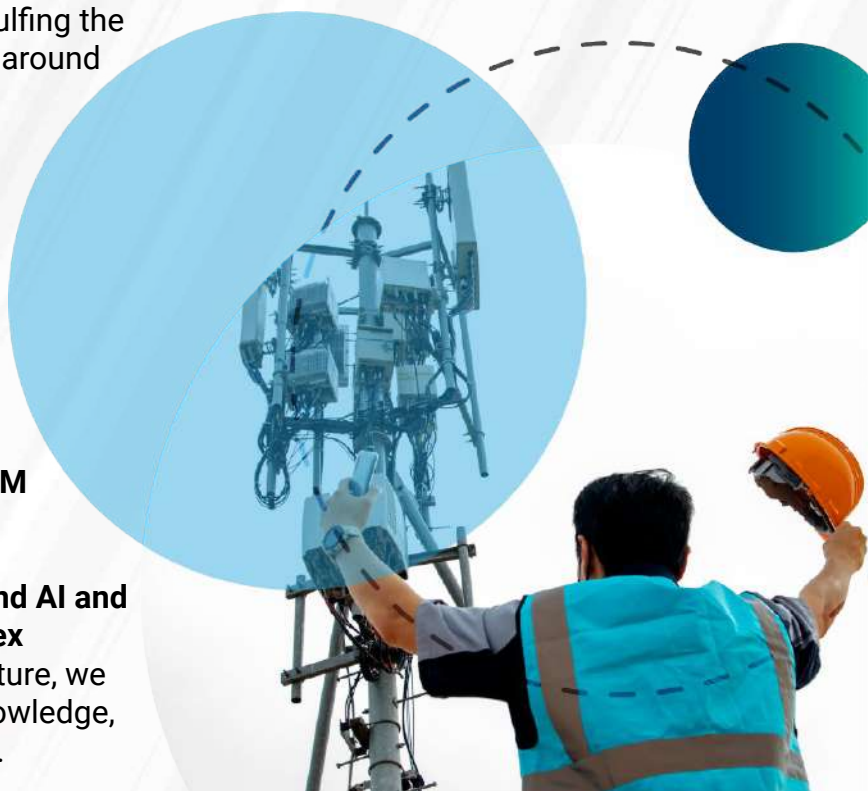
and generate a great number of employment opportunities.



The sheer deployment of 5G in the country needs millions of skilled and semi-skilled workers and will thus lead to an introduction of a large set of job opportunities in the industry. The adoption of 5G poses a ripple effect across industries that will require people from all verticals.

Creating a Future-Ready Telecom Workforce

The skill gap whirlwind is gradually engulfing the entire world today. A lot of buzzwords around us like IoT, AI and ML, automation, cloud computing, and 5G, with Industry 4.0, are paving the way to change the telecom industry landscape. Telcos must explore its qualified staff to lead the integration of these technologies to improve efficiency in network performance monitoring, predictive performance and configurations of data routing. Telcos must head-on by turning these marketing buzz phrases into reality. **Integration of CRM systems with enormous amounts of customer data and automation would help telcos to enable the intersection of data and AI and result in the smooth functioning of complex operations.** Rolling out of 5G in the near future, we need to be prepared for the specialized knowledge, and skill sets that these technologies seek.



Diverse Skill Sets

Although the new technologies are creating a lot of buzz, the industry is in need of skill development for the existing and future workforce. Upskilling, reskilling and cross-skilling of the workforce are essential for a business to survive; investing in existing employees ensures better quality control during internal mobility and higher retention rates. The telco business models changing, and technology is getting better and more innovative; employees equipped with the necessary skill sets are the torchbearers of organizational success. With the growing deployment of networks and applications/services in the country, a cross-section of skill sets ranging from network deployment to maintenance is essential. Since the industry has critical infrastructure covering many important verticals in the context of the digital network, smart city etc., diverse skill sets in services and applications are crucial.



Rethink and Reinvent

The theory of contestable markets states that companies with few rivals behave in a competitive manner when the market they operate in has weak barriers to entry. As of now, the telecom market is left as a duopoly with Airtel and Reliance Jio and entry barriers in the form of spectrum acquisition costs, the license fee burden as a percentage of Adjusted Gross Revenue, and infrastructure requirements are hindering the start-ups from entering the industry. The best area where telecom startups can have a meaningful impact is to build products in areas where a sharp change in the technology landscape is taking place.

The Indian IoT market is expected to grow at a CAGR of 14.2% from 2023 to 2028. IoT units in India are estimated to reach 100 billion by 2035,

producing humongous data, generating revenue and boosting employment opportunities. Telecom companies can engage with startups to reap benefits from their agility, executive speed, disruptive power, more importantly, manpower. Fundamental changes to current approaches are required to truly harness the innovative power of start-ups, young companies and digital upstarts, as 60-65% of start-ups in India are working on IoT.

Diversity and Inclusion in the Workplace

Building a diverse and inclusive workforce is increasingly a priority across industries, and telecom is no exception. As Covid has extended an opportunity to work remotely, the industry must extract top talent from all parts of the country to expand its talent pool. As 5G is transcending boundaries, it is opening a wide array of opportunities to the rural workforce, women, people with special abilities and people from different ethnicities to find their dream jobs by opting for remote work. 5G is also paving the way for more flexible workplace companies by adapting policies with the new way of working, such as flexible time off, benefit packages, and working hours aligned to the workplace and roles can be ensured by businesses successfully to integrate talents. By introducing a diverse and inclusive workforce, special attention can also be directed towards tackling low female representation in the industry.



Conclusion

5G in a way, has extended greater opportunities for employees to upskill and learn new courses in preparation for its rollout. It affects the whole industry and economy not only in India but the whole world. However, the technological advancement of 5G is at a nascent stage and can offer a lot more as it unfolds and gathers momentum in terms of employment opportunities and services, provided we are suitably prepared to harness its full potential.

In the words of Benjamin Franklin,



**BY FAILING TO PREPARE,
YOU ARE PREPARING TO FAIL**



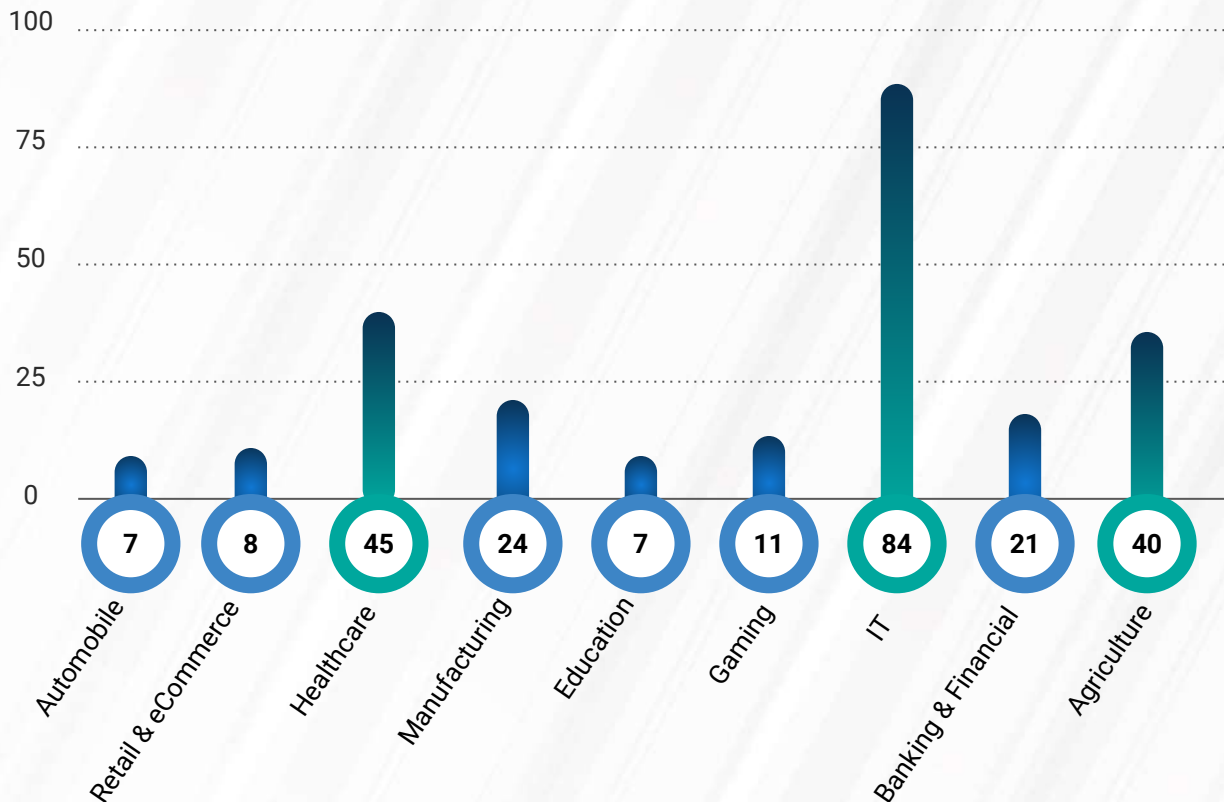
therefore, it is imperative that we plan ahead in order to realize the full potential of our efforts. As we move forward with the rollout of 5G in the country, preparedness for 5G, with the right policies and right workforce, is a great need of the hour. We feel that adopting the right approach to skill development will help the telecom industry ride this new wave of limitless opportunity and shower its benefits across multiple sectors. This, in turn, will lead to greater creativity, collaboration and innovation, which are key ingredients for success.



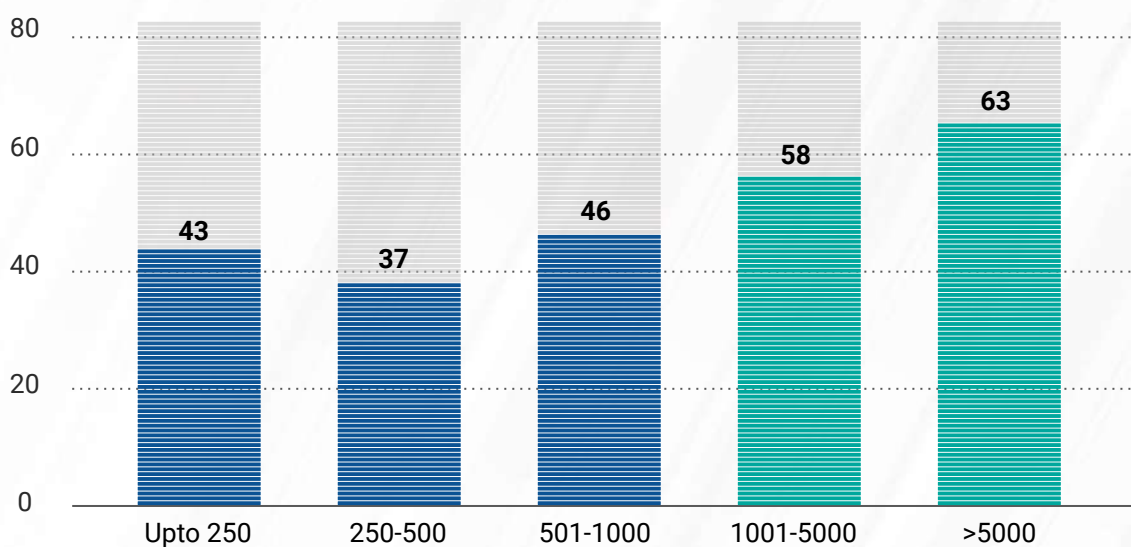
Research Methodology

- The analysis of the survey was carried out with employees with leadership roles and managerial roles actively involved in the decision-making process of hiring and skilling processes of organisations.
- Totally nine sectors have been surveyed in the report
- All findings are reported as percentages of total respondents at the specific levels of analysis.

Respondent Distribution by Industry



Respondents by Size of Company



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