

BIF's CXO Roundtable @ 10th India Satcom 2026

17th August 2026 ; New Delhi

Context

The discussion underscored that satellite communications is no longer a niche technology but an integral component of India's future digital infrastructure, complementing terrestrial networks and enabling ubiquitous, resilient and inclusive connectivity.

It was noted that India's ambition of building a **USD 44 billion space economy by 2033**, with satellite communications expected to contribute nearly one-third of this growth, would require a significant expansion in satellite capacity, private sector participation and enabling policy measures.

The discussion centered around the following questions:

1. Given huge opportunities in India for bridging the connectivity gap (Rural-Urban gap is ~75% as per TRAI QPIR -March 2026), what are the most viable satcom deployment models that can deliver meaningful broadband coverage in rural and remote areas over the next 2–3 years?
2. What could be the realistic target cost to the customers per GB for satellite broadband in India? Could India specific manufacturing bring terminal cost down to create mass market? And what policy interventions are required to promote indigenous manufacturing, local assembly, satellite terminals, trusted supply chains and development of a domestic satcom ecosystem in India?
3. What technical and regulatory safeguards are necessary for successful deployment of Direct-to-Device (D2D) satellite communications without causing harmful interference to terrestrial IMT, and existing MSS services?

Main Takeaways

- Satellite communications will always complement and not replace terrestrial networks.
- Backhaul remains the most immediate deployment opportunity for Satcom with significant opportunities beyond rural broadband, particularly in enterprise, maritime, aviation and government connectivity.
- NTN/D2D represents the long-term pathway towards affordable satellite broadband.
- High terminal costs for Satcom remain the principal barrier to mass adoption. Indigenous manufacturing should be pursued through ecosystem development.
- Greater access to investment and high-risk capital will be necessary to scale India's satellite ecosystem, especially indigenous manufacturing of terminal devices.
- Regulatory predictability and streamlined licensing will be critical to accelerating deployment.
- Market-led competition should drive affordability while the government focuses on creating an enabling policy environment.

Key Themes of Discussion

Viable Deployment Models for Satellite Broadband

- Satellite communications should primarily complement terrestrial networks by addressing areas where fibre or mobile infrastructure is technically difficult or economically unviable.
- Backhaul connectivity is one of the most commercially viable deployment models, particularly for geographically challenging locations.
- Satcom opportunity extends well beyond rural broadband, with significant demand expected from:
 - Enterprise connectivity
 - Banking and financial services
 - Maritime connectivity
 - Aviation and in-flight connectivity
 - Disaster response and emergency communications
- Participants emphasised that satellite services should not be restricted only to rural and remote deployments, but should be enabled across consumer, enterprise, mobility

and institutional use cases to improve commercial viability and reduce costs through scale.

Affordability, Business Models and Terminal Costs

- High terminal costs continue to represent one of the biggest barriers to large-scale satellite broadband adoption.
- NTN/D2D technologies represent the long-term pathway towards affordable satellite connectivity by enabling existing mobile devices to connect directly to satellites without dedicated terminals.
- Commercial viability for Satcom should not be assessed solely through retail consumer pricing. Institutional, enterprise and government use cases are expected to play an important role in stimulating early demand and supporting sustainable business models. **Hence, affordability should evolve through scale and market competition rather than becoming a precondition for deployment.**

Manufacturing and Indigenous Ecosystem Development

- There is a need for a long-term strategy to promote indigenous manufacturing of satellite terminals and related equipment. India should position itself as a manufacturing hub not only for domestic demand but also for global and regional markets.
- Greater collaboration between satellite operators, technology providers, manufacturers and contract manufacturers is essential for achieving economies of scale. The discussion also highlighted the importance of:
 - Technology transfer.
 - Local assembly and integration.
 - Trusted supply chains.
 - Interoperability and standardisation over time.

D2D / NTN Evolution

- D2D technologies represent one of the most significant long-term opportunities for the sector, with potential to extend beyond consumer connectivity into agriculture, mining, logistics, connected mobility and industrial IoT applications.
- Convergence between terrestrial and satellite networks through NTN standards is expected to significantly reduce terminal costs over time.
- Standardisation and interoperability across ecosystems will be important for unlocking economies of scale.

Regulatory and Policy Enablers

- It is necessary to ensure a **streamlined, predictable and technology-neutral regulatory framework** so as to **create a stable investment environment. This will help attract high-risk capital into India's space ecosystem.**
- Enable faster deployment through amendments to existing licensing frameworks, rather than requiring migration to new authorisation regimes.
- Facilitate phased approvals, particularly for enterprise, government and strategic use cases; Support community connectivity initiatives through appropriately targeted public funding mechanisms, including viability gap funding where justified.
- Encourage market-led price discovery rather than regulating pricing at an early stage.
- Facilitate faster access to spectrum and regulatory approvals as market demand evolves.
- Initiate dialogue for collaboration between manufacturers and users of satellite infrastructure for ensuring India ascends as a regional and global hub for manufacturing.