NOKIA | MBiT Index

13th Edition

India Mobile Broadband Index **2026**

About

Nokia MBiT Index

Nokia MBiT Index is an annual report on mobile broadband performance in India. It provides valuable insights, data and analysis of mobile broadband and traffic growth and correlates these trends with the connectivity ecosystem including devices and traffic patterns.

01 The 13th edition of the report assesses mobile broadband data traffic growth and trends across India. It also tracks data consumption per user and sheds light on the device ecosystem in India.

02 5G consumption continues to show strong countrywide growth, with metro circles leading in adoption. This is further fuelled by the growing uptake of FWA and the increasing availability of budget 5G phones.

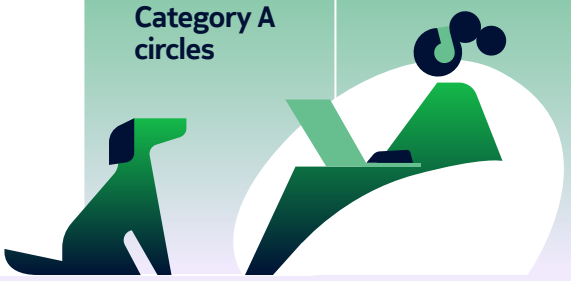
03 The AI Supercycle is projected to have a profound impact on network traffic, primarily by driving substantial growth and altering traffic patterns. This report also explains the AI impact on traffic.

Pan India monthly 5G traffic grows 70% (y-o-y) to reach 12.9 EB in 2025

5G data traffic contribution in metro circles reaches

58%

Maximum growth witnessed in **Category A circles**



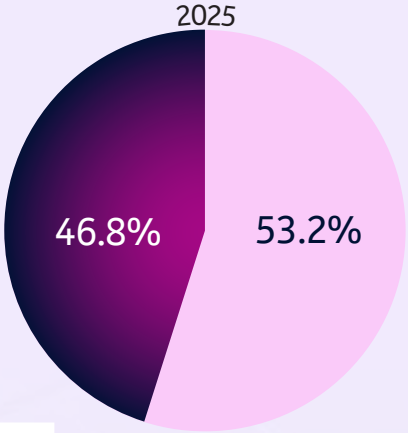
Share of 5G FWA in overall 5G data traffic

over 25%

Traffic contribution (%)

5G 4G

2025



Average monthly mobile data traffic per user (GB)

5G smartphone share in 2025

over 90%

of smartphones shipped in 2025 are 5G capable

Active 4G devices which are 5G capable

43%

Monthly data traffic **27.6** Exabyte

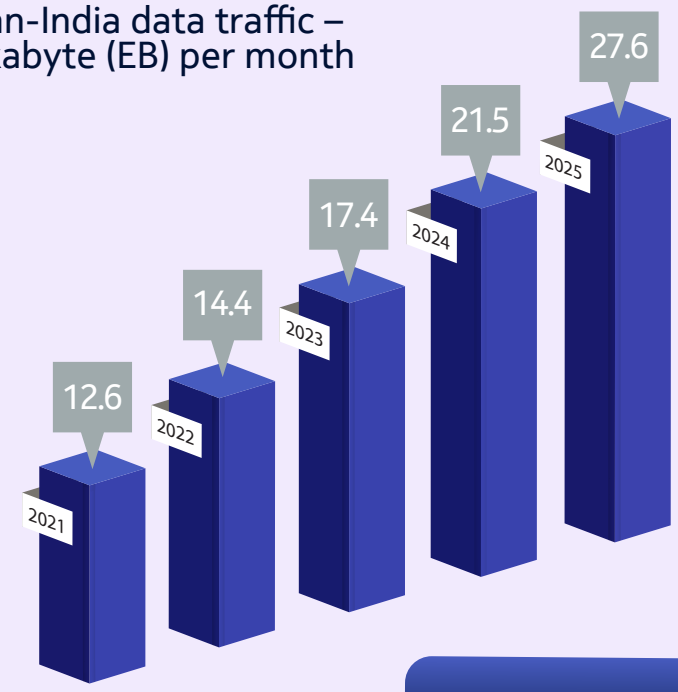
28% Y-O-Y Growth

Over **2x** Growth in 5G FWA subs

Source: Nokia Analysis

Monthly data traffic crosses 27 EB, up 28%* (y-o-y)

Pan-India data traffic – Exabyte (EB) per month



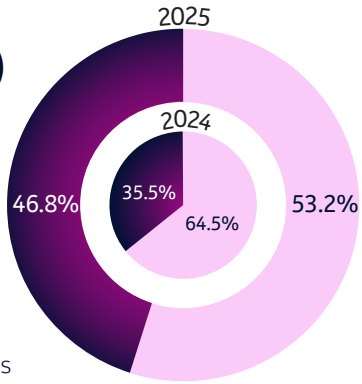
21.7% CAGR

Source: Nokia analysis, Operator Quarterly Reports

- 5G (FWA & Mobile) driving data growth as 4G traffic stabilises.
- Over 10X growth in budget 5G phone shipments (less than 100$) in 2025 (y-o-y).

Traffic contribution (%)

5G 4G



Source: Nokia analysis, Operator Quarterly Reports

- Data traffic (5G) contribution per month (2025) : 12.9 EB
- 5G Traffic crosses 50% in Metro circles, nearing halfway mark in other circles
- 137 million 5G smartphones shipped in 2025
- India's 5G subs base projected to reach ~1 Billion by 2031

Wireless broadband subscriber base (million)

Source: Nokia analysis, TRAI

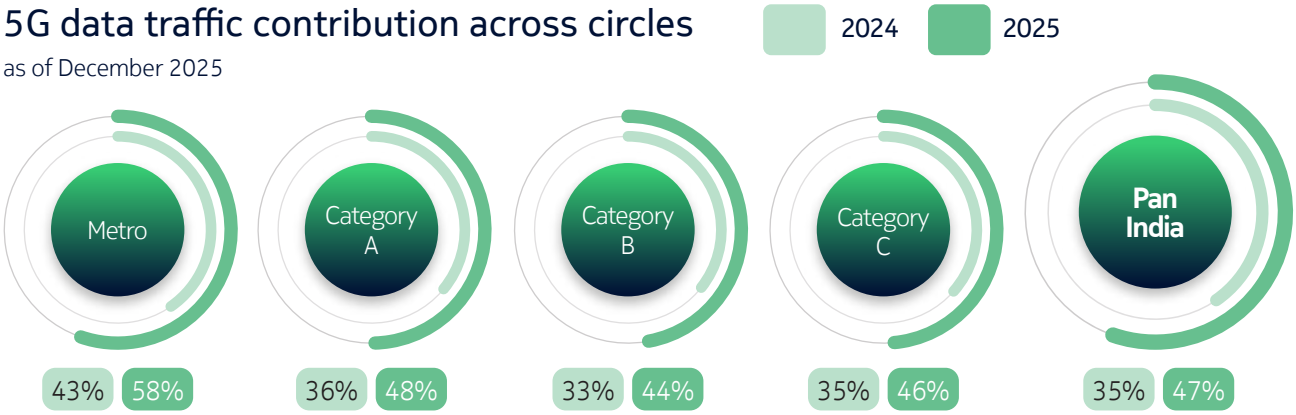
*Represents y-o-y growth: Dec-24 vs Dec-25

Note: 3G contribution in overall data traffic is marginal

5G traffic registers 1.7X surge across all circle categories

5G data traffic contribution across circles

as of December 2025

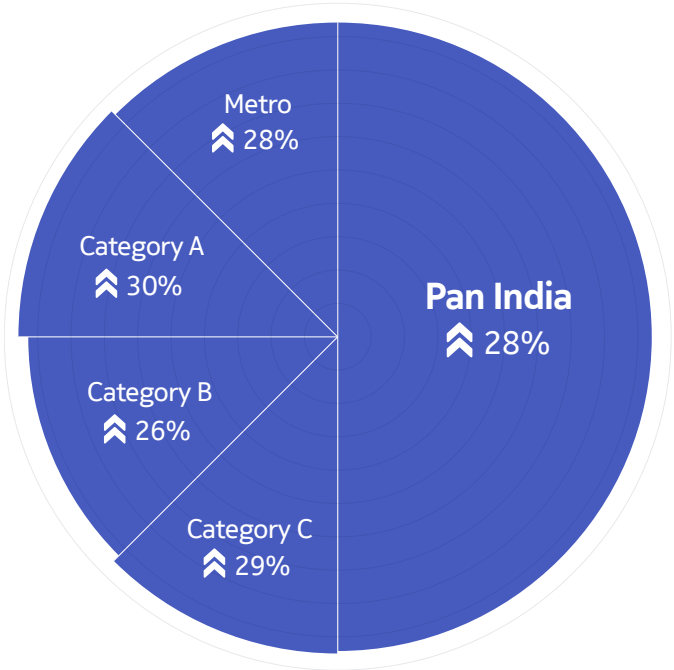


- 5G accounts for 58% of metro circles data traffic, up from 43% in 2024.
- 5G adoption continues to accelerate, with average traffic share reaching 47% across circles.

Source: Nokia analysis

Growth in 5G+4G data traffic per month across circle categories

December 2025 vs December 2024



Source: Nokia analysis, Operator Quarterly Reports

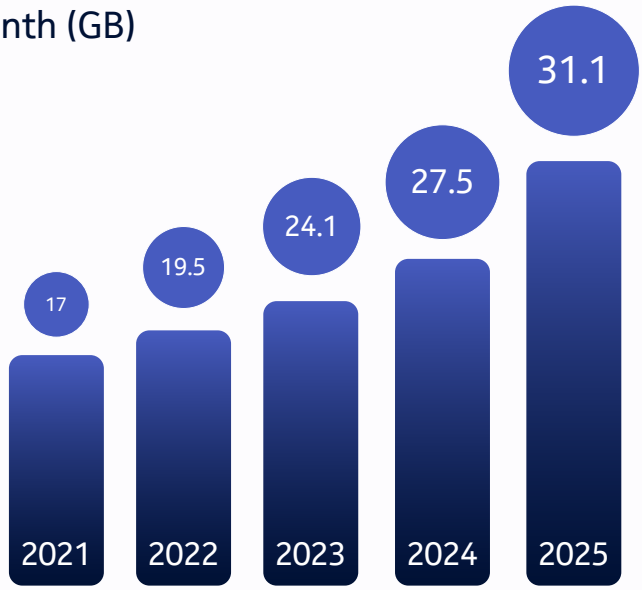
Monthly data usage per user hits 31 GB in 2025, clocks 18% CAGR over five years

Average mobile data per user per month (GB)

as of December 2025

CAGR of 18.2% in last five years

Consumption per Day



Source: Nokia analysis

5G FWA - A key catalyst for data traffic growth

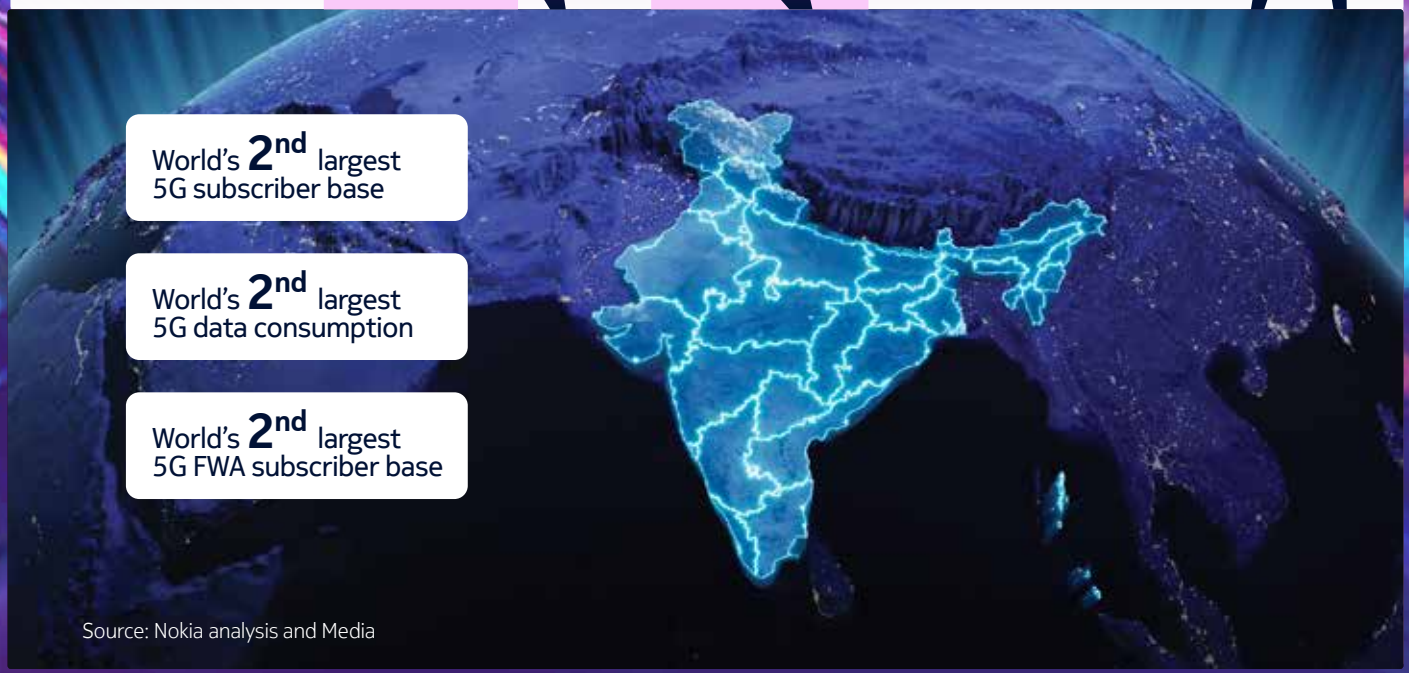
Over **25%** share of 5G FWA in overall 5G data

FWA vs Average mobile user data consumption **10X**

Over **2X** growth in 5G FWA subscribers y-o-y

Source: Nokia analysis

Source: Nokia analysis and TRAI



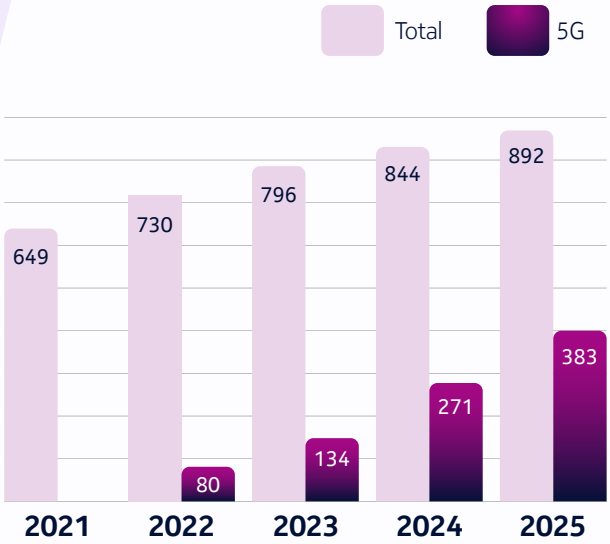
- World's 2nd largest 5G subscriber base
- World's 2nd largest 5G data consumption
- World's 2nd largest 5G FWA subscriber base

Source: Nokia analysis and Media

90% of smart phones shipped are 5G capable, boosting support for existing bands in 5G

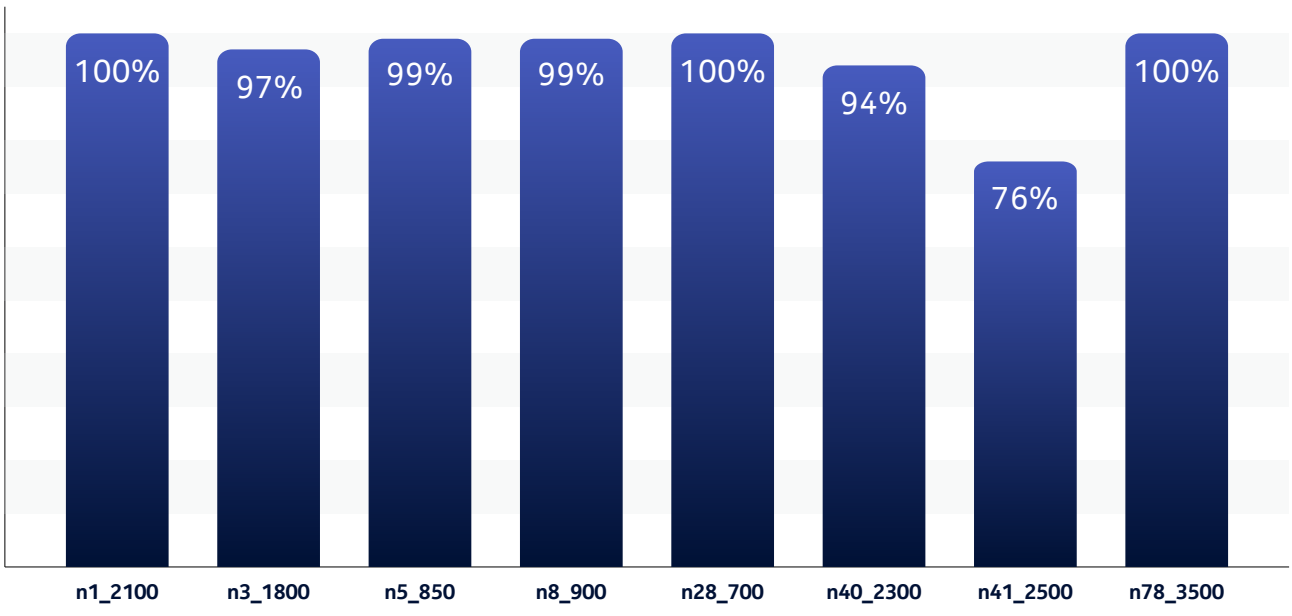
5G and 4G devices

- 892 million active 4G devices; out of which 383 million are 5G capable.
- Over 9 out of 10 smartphones replaced in 2025 were 5G-capable
- The share of 5G smartphone in overall smartphone shipments grew to 90% in 2025 (vs.79% in 2024)



Smartphone ecosystem ready for multi-band 5G deployment

- Near-complete device support for 5G deployment across new bands (n1, n3, n5, n8)
- Wider device support for 5G capacity bands (n40, n41) to meet growing traffic demand



Band support vs devices shipped in 2025

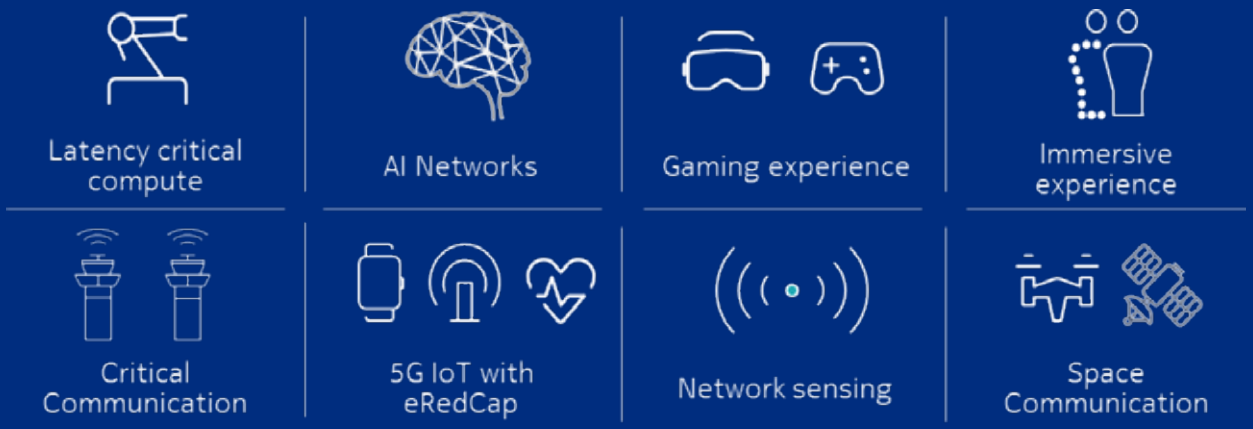
Source: Nokia analysis

Network Evolution from connecting data to processing intelligence

The device ecosystem is rapidly expanding

Source: Nokia analysis

New use cases emerging



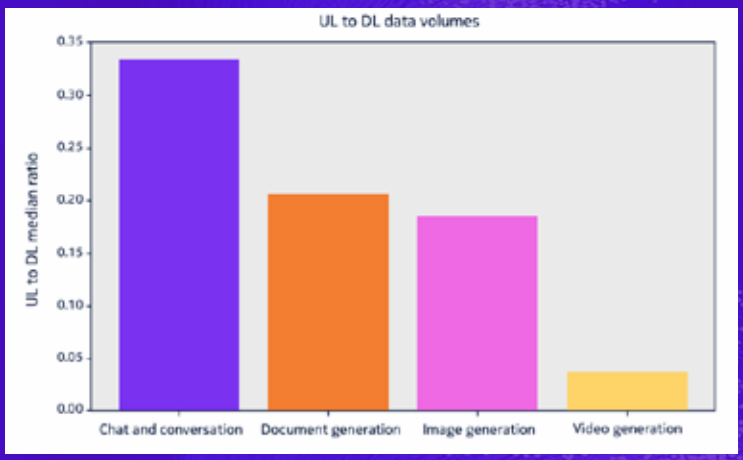
GenAI applications are changing the requirements on the mobile networks

Shifting UL/DL ratios	**Rising data volumes**	**Sensitivity to latency**
Uplink data is growing faster than downlink traffic	Multi-modal, user-friendly experiences are increasing overall traffic	Latency sensitive applications are gaining traction

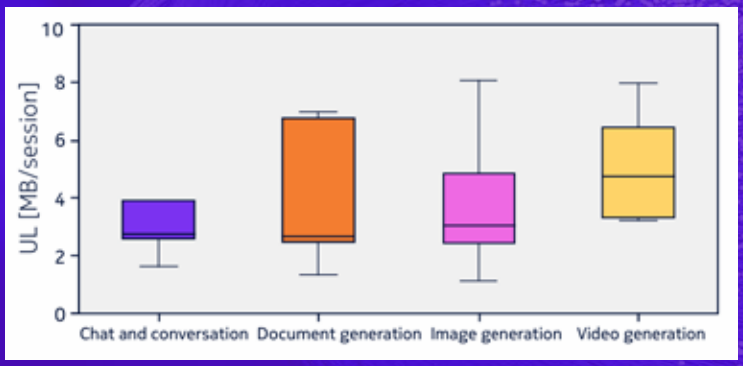
Source: Nokia analysis

The impact of AI-apps on mobile networks

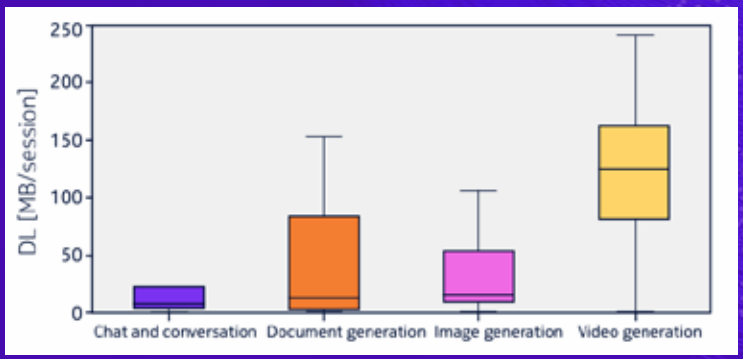
At Nokia, we conducted an extensive analysis of GenAI applications and services to understand how GenAI services are reshaping traffic patterns and network demand.



The spread of the data volumes per app session strongly evidences that overall network traffic prediction becomes more challenging with AI traffic stepping alongside conventional human generated traffic.



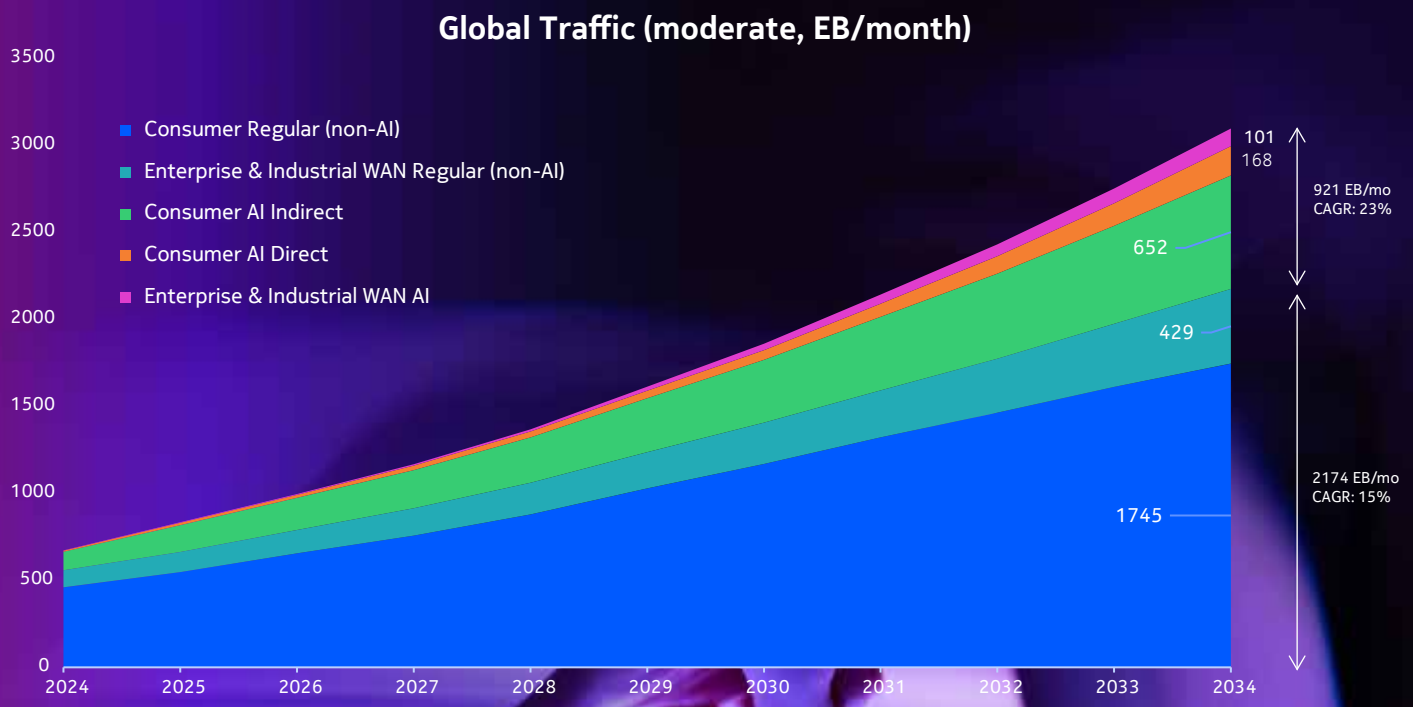
AI apps running directly on the smartphone reduced immediate data exchange with the cloud. However, cloud-based synchronization or data backups of documents, images or videos increased overall data volumes.



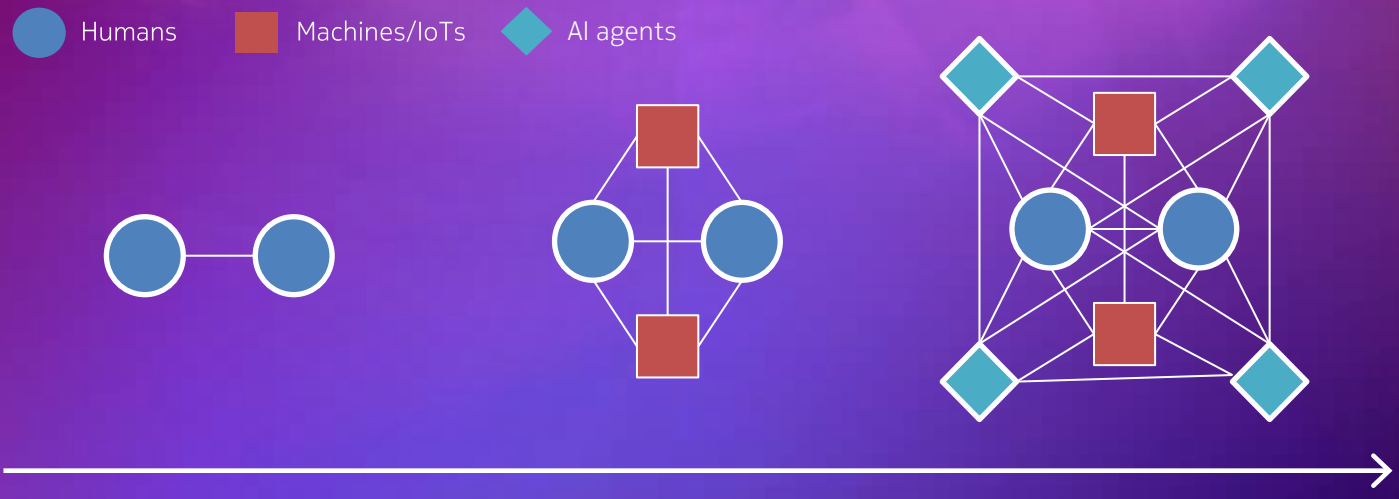
In the future, a broad adoption of AI-apps will shift the ratio towards a relatively higher uplink capacity need.

Source: Nokia analysis

Global WAN traffic projection



The (r)evolution of AI and LLM is redefining network needs



2G & 3G

Built mainly for human communications

4G & 5G

Expanded to support machine and IoT connectivity

6G

Extend further to connect AI agents and intelligence

Source: Nokia analysis

Future outlook

As data demand accelerates, 5G capacity will scale through continuous layer addition within the existing network footprint, creating a denser and more resilient network fabric.

The growing availability of affordable 5G smartphones will remain one of the primary drivers of mass 5G adoption in India.

The existing downlink-to-uplink traffic ratio is set to shift with the rise in uplink traffic, driven by the surge in AI-applications.

The shift from traditional applications to real-time, immersive and autonomous systems will drive the need for AI-native networks designed to handle far more data, far more intelligence, and far more complexity.

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Nokia is a global leader in connectivity for the AI era. With expertise across fixed, mobile, and transport networks, we're advancing connectivity to secure a brighter world.