

Synchronising Frequencies

A 20.5x growth in telecom CSR over a decade signals the opportunity to turn scale, networks and capabilities into greater impact



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India Mobile Congress (IMC) stands as Asia's largest digital technology forum, where leaders from Telecom, Media, and Technology (TMT) converge to shape the future of innovation. Organised by the Department of Telecommunications (DoT) and the Cellular Operators Association of India (COAI), IMC provides a premier platform for showcasing breakthrough technologies, influencing policy dialogue, and fostering strategic partnerships across industry, the government, startups, and academia. From 5G and AI to green tech and digital inclusiveness, IMC brings together stakeholders to shape the future of India's digital economy and global technological leadership.

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An overview of India's corporate philanthropy ecosystem



Corporate giving has **evolved from a compliance obligation** into a significant, predictable pool of development capital

A Decade of India's CSR (2014-25)

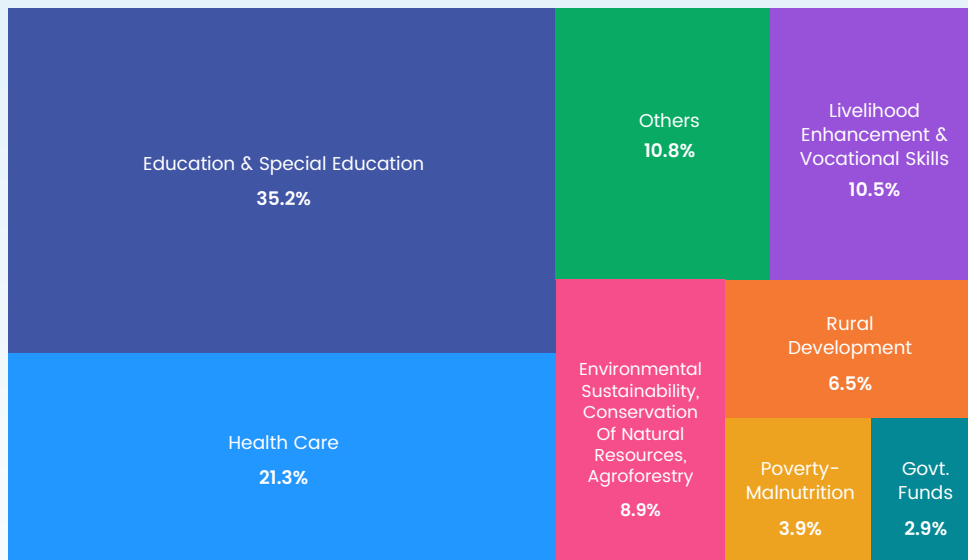
Total CSR: ₹ 2.6 lakh crore



Source: Sattva Analysis of CSR Data (csr.gov.in)

Corporates **continue to largely back education and health**, while government-directed CSR declines

CSR Funding by Development Sector (FY22–23 to FY24–25)



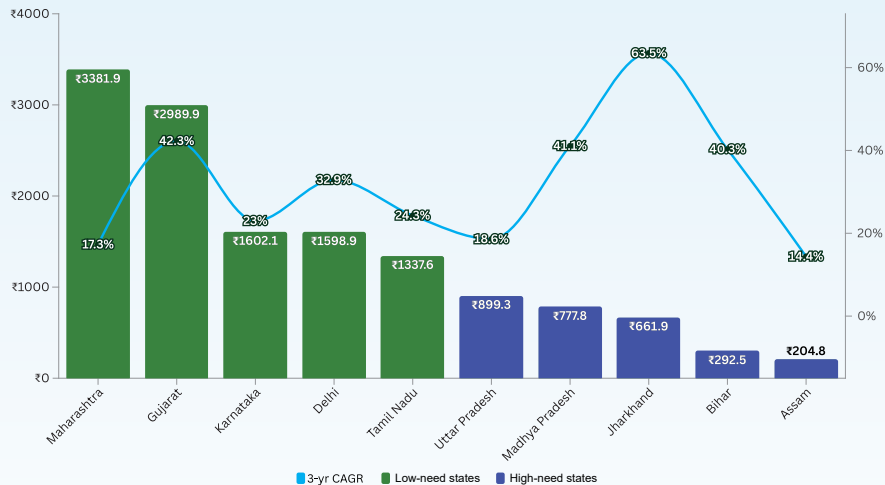
- Between FY23 to FY25, **Education, Healthcare, Livelihoods & Skilling, Rural Development and Environment Sustainability** received the highest funding.
- **Vocational skills** noted the third largest percentage increase from previous year at 36%.
- **Government-directed CSR contributions fell** from a peak of 13.3% in FY21 to 2.3% in FY25.

Source: Sattva Analysis of CSR Data (csr.gov.in)



CSR is beginning to move towards high-need states, **seeing ~35% CAGR in CSR spend**

3-yr CAGR of CSR Funding of high and low need states vs absolute growth, FY21-22 to FY24-25



- **CSR funding in high-need states is growing faster.** This growth has been supported by ~200% increase in CSR funding in Aspirational Districts and ~137% increase in PSU CSR investments between FY22-25.
- **Yet the underlying funding gap remains significant.** The five highest-need states as per MPI receive just ₹94 CSR per capita, versus ₹455 in the five lowest-need states as per MPI. Bihar's MPI is nearly 5 times Maharashtra's, while the latter receives nearly 19 times more CSR per capita.
- **Faster percentage growth has not yet translated into comparable absolute funding.** Over three years, Maharashtra received an additional ~ ₹3382 crore in CSR funding, compared to just ₹292.5 crore in Bihar.

Note: To show 3-yr CAGR, 4 years of CSR Funding has been considered. To show need, MPI (Multidimensional Poverty Index) which measures poverty across multiple dimensions, including health, education and living standards has been considered.

Source: Sattva Analysis of CSR Data (csr.gov.in), Niti Aayog SDG Index 2023-24, Niti Aayog MPI Index Report 2023



CSR is no longer just about where companies give, it is about how **strategically they deploy capital**



From compliance to conviction

24,000+ companies under the law. 56% of companies spent above their mandate in FY25; 127 companies with no mandate at all gave ₹157 crore voluntarily.



From NGOs to a wider partner base

Specialised institutions received ~20% of CSR implementation funding in FY24; education and research institutions absorbed nearly half of that.



From goodwill to material alignment

40–60% of all CSR funds in FY24 went to sectors materially linked to core industry needs, with nearly 1 in 3 companies allocating ~75% of their CSR budgets to business-critical sectors.



From metros to industrial India

Between FY24–FY25, Tier-1 received the highest CSR funding, but the highest growth rate was witnessed by Industrial Districts (73%), districts with 2 million+ cities (57%) and districts with 1–2 million cities (54%).



From programmes to outcome based funding and innovative finance

Corporates are moving to outcome based and recyclable funding models, using CSR grants as concessional capital to unlock private investments in risky segments.

These shifts have made CSR more strategic, and created an opportunity to rethink what strategic deployment should look like.



Telecom: India's foundational infrastructure





Telecom infrastructure has become a **nation-wide digital backbone**

Sectoral gross revenue grew by 10.7% in FY25 to ₹3.72 lakh crore.

Network



122 Cr+

telecom subscribers



5.63 lakh

5G base stations (Jun-2026)



99.9%

of India's districts covered by 5G; 85% of population



2.14 lakh

Gram Panchayats became service-ready on BharatNet (the world's largest rural broadband project)

SUPPORTING INFRASTRUCTURE



24,161 Cr

UPI transactions worth ₹314 lakh Cr (FY26)



176 Cr

DBT beneficiaries covered (2014-24)



43 Cr+

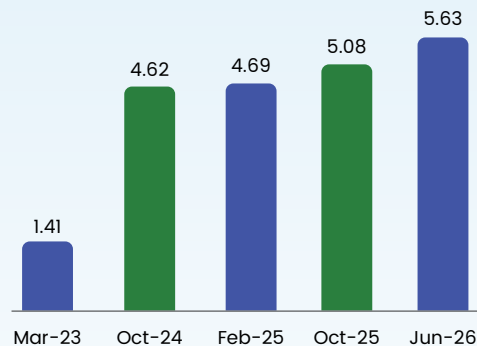
eSanjeevani telemedicine consultations

"India's journey in telecom has moved from connecting the next billion to enabling the next billion possibilities."

Shri Jyotiraditya M. Scindia, Union Minister for Communications

PACE OF NETWORK EXPANSION

5G base stations installed (lakh), as reported



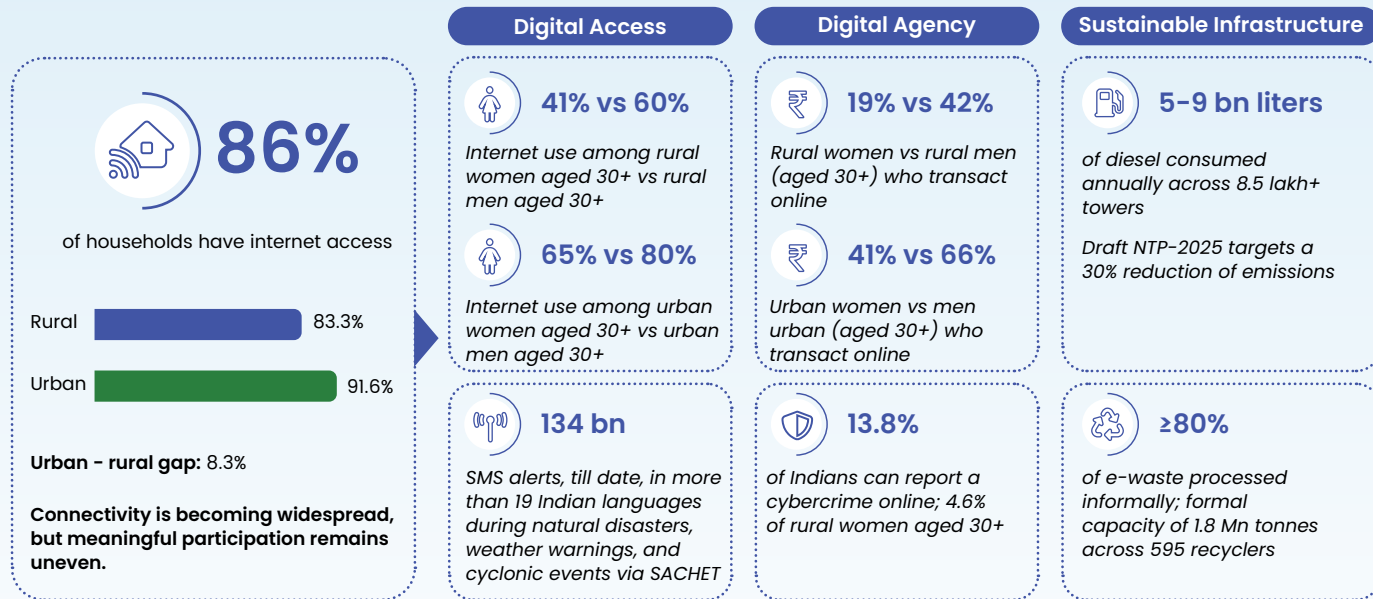
3.4 times growth in 5G base stations in 31 months

Optical fibre expanded from 19.35 to 42.36 lakh route km (2019-2025)

Source: Ministry of Communications/PIB; Department of Telecommunications (DoT); Telecom Regulatory Authority of India (TRAI); Ministry of Health & Family Welfare; Ministry of Finance/PIB



As telecom scales, its **priorities are evolving** from deepening digital participation to addressing growing demands on energy and other resources

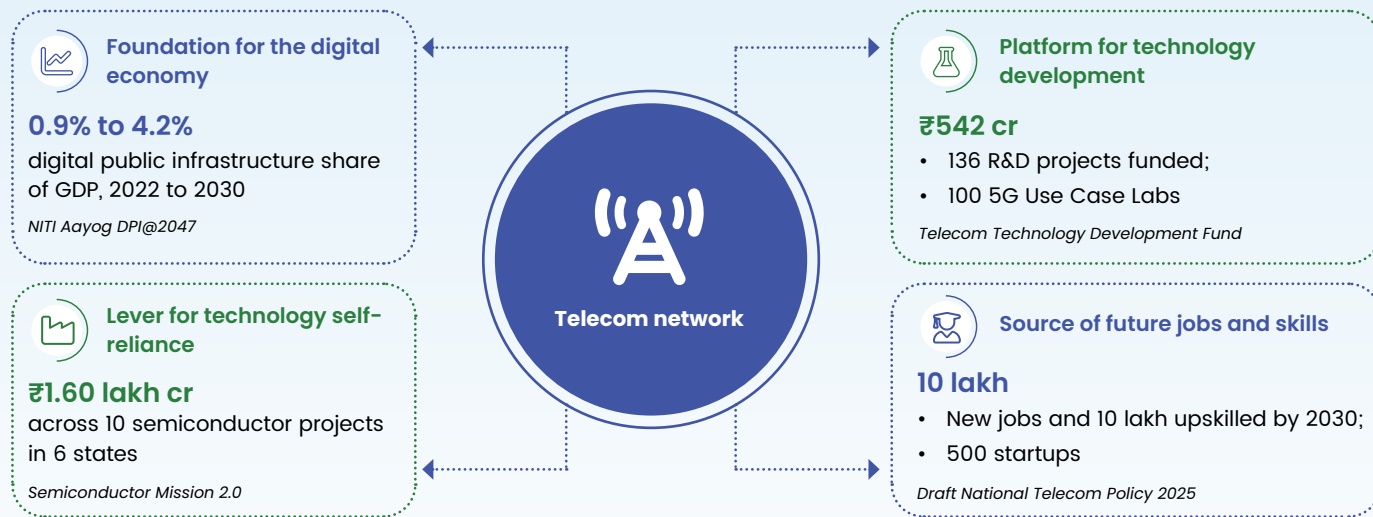


As connectivity expands, the next frontier is ensuring that people can use it meaningfully, safely and productively, while managing the growing resource footprint of digital infrastructure.

Source: NSS 80th round, Comprehensive Modular Survey: Telecom 2025 (Jan–Mar 2025), MoSPI; Department of Telecommunications (tower count); Counterpoint Research; Deven Choksey Research, 2025; MoEFCC



Policy increasingly positions telecom as the **foundation of India's digital economy**, extending its role beyond connectivity to technology development, self-reliance and future capabilities

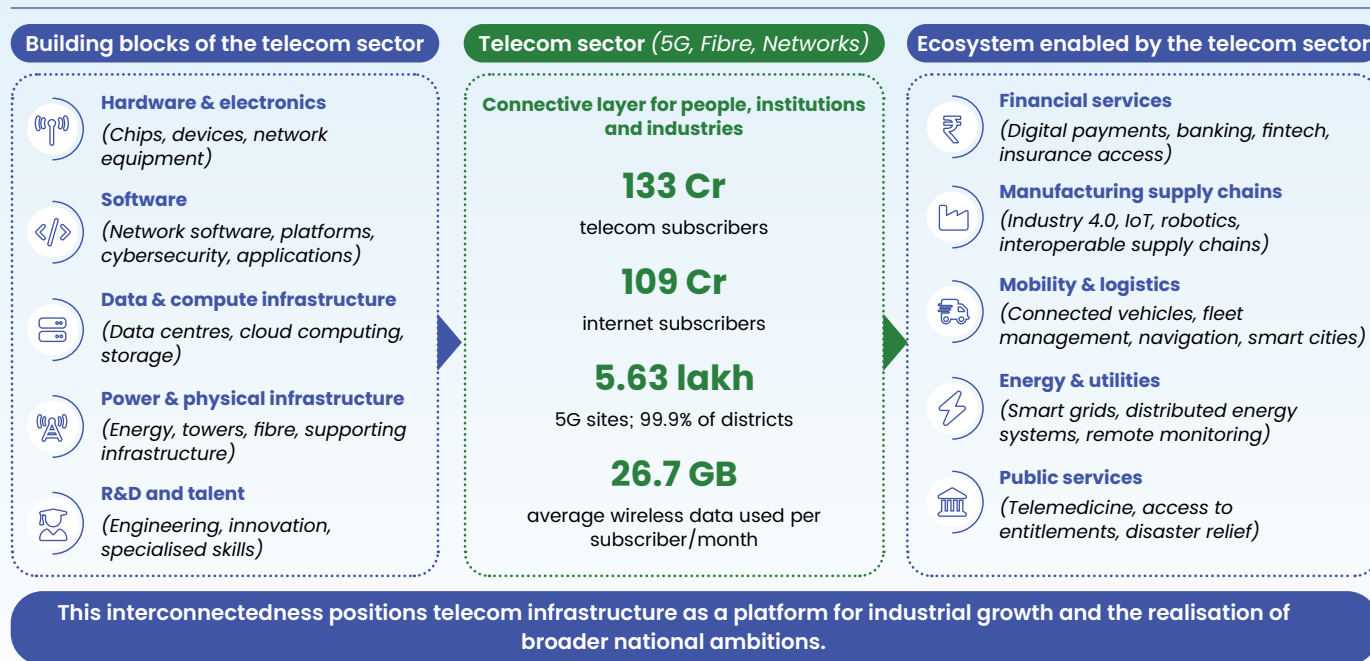


As telecom moves beyond connectivity, CSR can harness its networks, technology, R&D and ecosystem capabilities to tackle development challenges where these assets can deliver distinctive value.

Source: NITI Aayog (DPI@2047); PIB; DoT (Draft NTP 2025), Government of India



Telecom is at the centre of an **increasingly interconnected ecosystem**, shaped by advances in technology and infrastructure, while driving growth across other industries





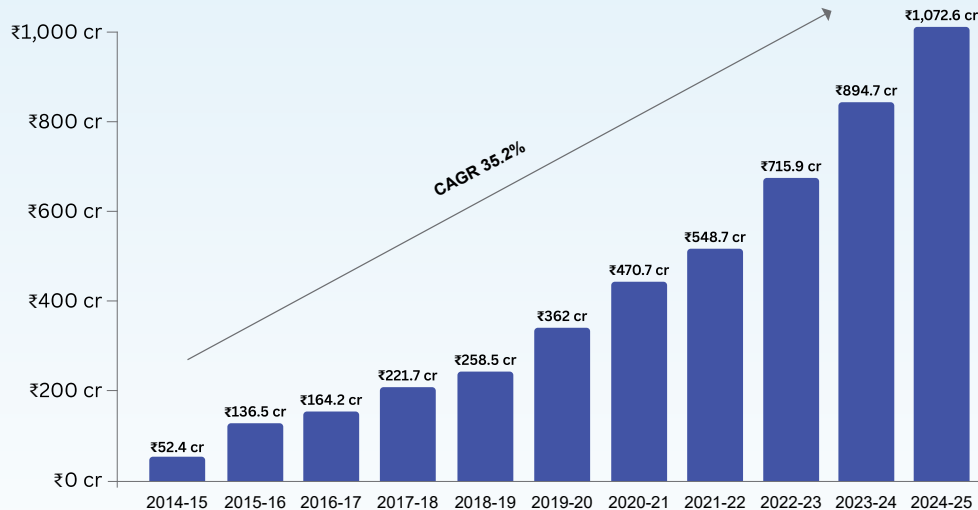
Telecom CSR at a glance





Telecom CSR has grown from **₹52 Cr in FY15 to ₹1,073 Cr in FY25 – a 20.5x increase**, bringing the sector to a new scale of development capital

Telecom sector quantum and CAGR growth, FY14-15 to FY24-25



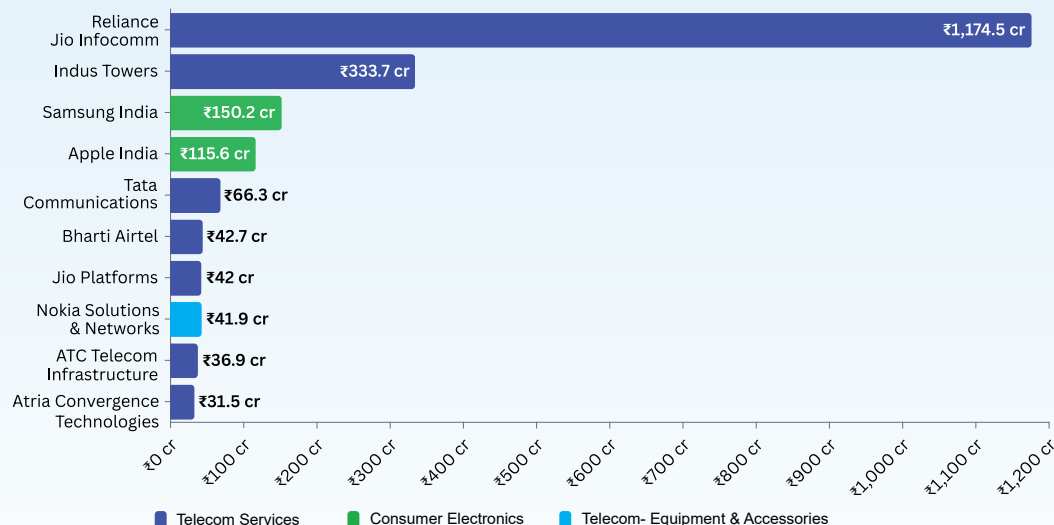
- An analysis of 114 companies tagged within the telecom sector indicates CAGR growth of ~35% between FY15-25 **more than twice the ~15% CAGR of national CSR**.
- **Telecom Services anchors sector CSR at scale**, accounting for 71.1% of three-year spend, while Industrial Electronics is the fastest-growing segment, with a 60.8% CAGR between FY23-25, from a smaller base.
- Between **FY23-25, 57 Indian companies accounted for 75.5% of telecom CSR spend**, despite there being a comparable number of MNCs (56).

Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22-23 to FY24-25 using Sattva's own industry categorization based on SEBI categories.



10 companies account for 76% of telecom CSR, among which seven are telecom service providers

Top 10 telecom CSR funders, FY22-23 to FY24-25

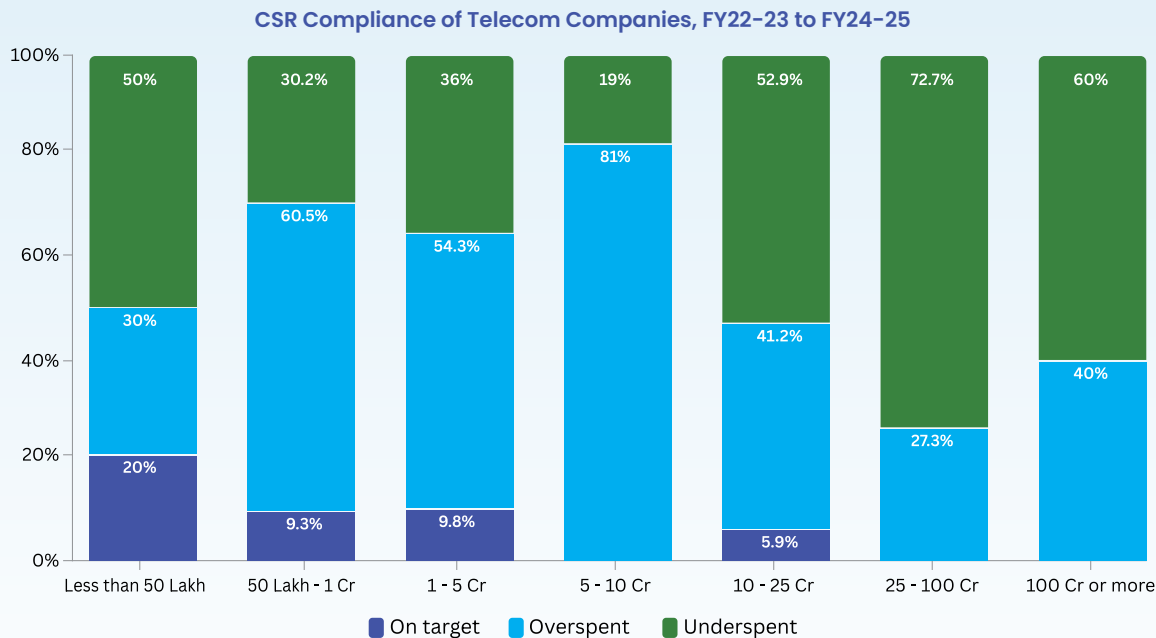


- **62% of the telecom CSR spend comes from the top three funders**, within which 44% comes from Reliance Jio Infocomm.
- **2 of the top 10 are consumer electronics makers** (Samsung & Apple), together contributing ₹266 Cr between FY23-25.
- **Median three-year spend per company has been ₹4.1 cr.**

Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22-23 to FY24-25 using Sattva's own industry categorisation based on SEBI categories.



52.5% telecom companies spend beyond their mandate, peaking at 81% in the ₹5–10 Cr band

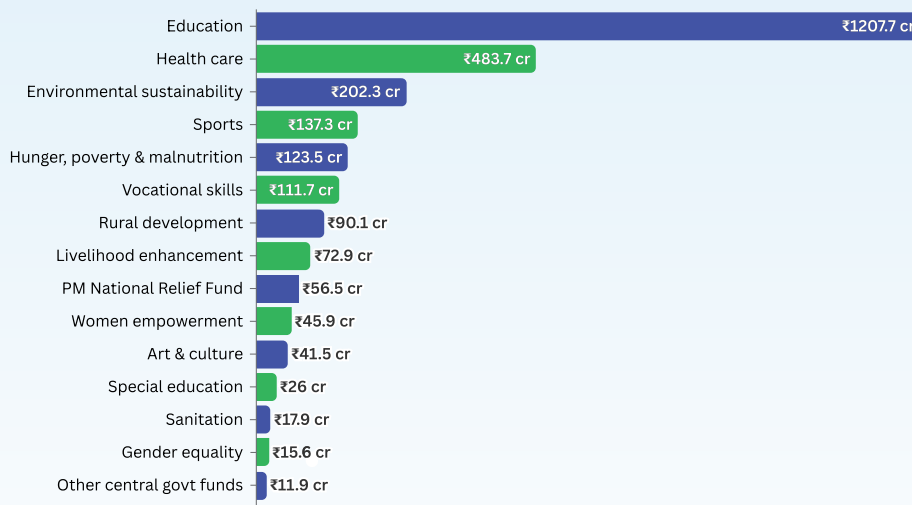


Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22–23 to FY24–25 using Sattva's own industry categorization based on SEBI categories.



Education emerges as the defining priority of the telecom sector, receiving 45% of telecom CSR, 1.3x of the national share

Sector-wise CSR Funding by Telecom Companies, FY22-23 to FY24-25



- **The top three funders heavily influence telecom's Health and Sports spending:** without them, Sports falls from 5.1% to 1.6%, while Health drops from 18% to 11.4% of telecom CSR.
- Excluding the top three funders, telecom CSR has a **stronger focus on rural development and livelihoods than the national average:** 7% goes to Rural Development vs 6.5% nationally, and 7.1% to Livelihood Enhancement vs 6.2%.
- **Environment broadly mirrors the national CSR mix-** 7.5% vs 7.3%.

Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22-23 to FY24-25 using Sattva's own industry categorization based on SEBI categories.

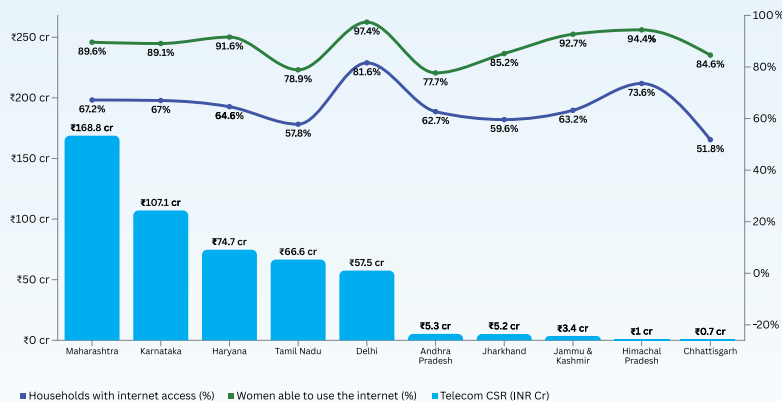


**Telecom CSR is expanding
beyond concentrated
geographies, creating greater
scope to reach underserved
regions**



Telecom CSR spends **65.9% outside HQ states** compared to **47.7% national average**, but it remains concentrated

Telecom CSR by top 5 and bottom 5 recipient states, FY23–25, excluding top 3 funders

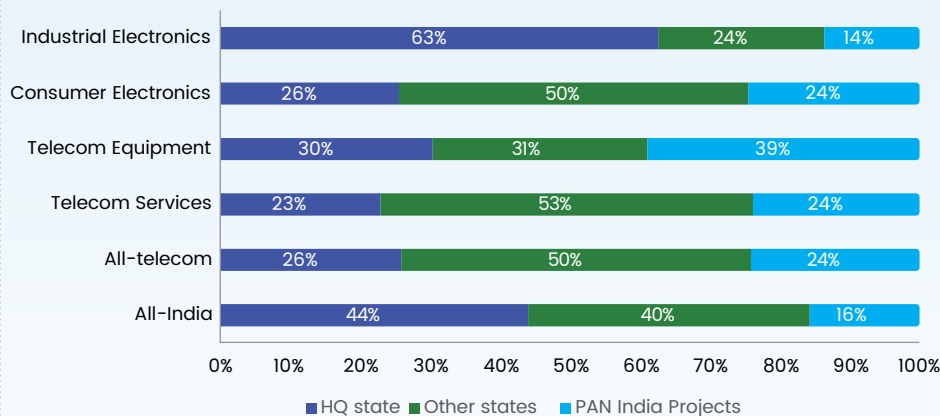


- **Telecom CSR reaches well beyond company headquarters:** 65.9% of geographically attributable spend goes outside HQ states, compared with 47.7% nationally.
- **Despite this wider reach, funding remains concentrated:** even excluding the three largest funders, the top five states account for 61% of telecom CSR, versus 48.7% nationally, while the bottom five receive just 2.7%, versus 8.5% nationally.
- **Maharashtra and Gujarat account for ~50% of telecom CSR overall**, but their combined share falls to 27.9% when the top three funders are excluded, compared with ~33% of national CSR.
- **Higher-funded states generally have stronger digital access**, particularly among women, while the gap is narrower for household connectivity.
- **Digital access alone does not explain where telecom CSR flows:** Odisha and Jharkhand receive just 0.6% and 0.3% of telecom CSR despite lower digital access, while Bihar and Rajasthan receive 1.3% and 5.5%, slightly above their national CSR shares.

Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22–23 to FY24–25 using Sattva's own industry categorization based on SEBI categories; NSS 80th round, Comprehensive Modular Survey: Telecom 2025 (Jan–Mar 2025), MoSPI.

While the largest funders shape telecom CSR's Tier-1 and industrial concentration, **reach of the entire sector in high-need geographies remains limited**

Spend in HQ vs non-HQ States by Telecom Companies, FY23-25



- **Telecom Services drives CSR spend in non-HQ states while Industrial Electronics** is an exception, with 63% allocated to HQ states, compared to the national average of 44%.
- **The largest 3 funders account for much of telecom's Tier-1 and industrial-district concentration:** excluding them, Tier-1 allocation falls from 38.2% to 31.5%, broadly matching the national 32.2%, while industrial-district allocation falls from 11.7% to 3%. Other District allocation accounts for 15.5% allocation by excluding the top 3 funders, but remains below the national 18.6%.
- **Between FY23-25, 7.6% of telecom CSR reached Aspirational Blocks, compared with 13.9% nationally.**

Source: Sattva Analysis of data extracted from Ministry of Corporate Affairs, FY22-23 to FY24-25 using Sattva's own industry categorization based on SEBI categories.

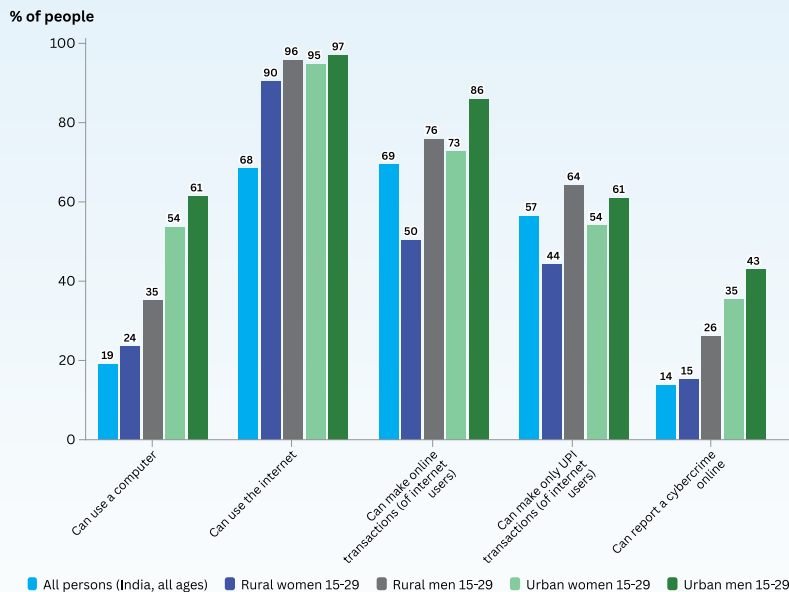


**Telecom CSR is extending digital
inclusion beyond connectivity, but
meaningful digital agency remains
an emerging frontier**



86% of Indian households have **internet access**, but digital agency remains significantly lower

What Indians did online in 2025



- **Device access remains unequal:** ~29% of rural women own a smartphone, vs ~50% of rural men- a 20.5 percentage point gender gap. Among rural women aged 30+, ownership falls further to 28%.
- **Household connectivity outpaces individual device ownership:** 86.3% of Indian households have internet access, compared to 36.4% of people who own a smartphone.
- **Connectivity does not guarantee access to digital services:** Among rural women aged 15-29, 90.4% can use the internet, but only 50.4% of internet users can make online transactions and 44.2% can use UPI.
- **Safe participation remains a major capability gap:** Only 13.8% of people in India can report a cybercrime online, falling to 4.6% among rural women aged 30+.

The next frontier for digital inclusion is not only connecting people, but enabling them to participate meaningfully, productively and safely online.

Source: NSS 80th round, Comprehensive Modular Survey: Telecom 2025 (Jan-Mar 2025), MoSPI



Telecom CSR places a **stronger emphasis on digital inclusion** than the national average, but <10% of the sector's spend goes towards it

Digital Inclusion

₹257.6 Cr

total spend on digital inclusion (FY23–FY25)

9.6% vs 1.7%

share of total telecom CSR vs national total CSR

37 of 113

telecom companies fund digital inclusion



Expanding Access

Devices, infrastructure and digital services

₹152.1 Cr | 61 projects between FY23–25

Intervention Type	Funding share
Platforms & services	70.1%
Infrastructure & connectivity	27.5%
General digital inclusion	1.3%
Distribution of personal devices	1.1%

Access funding is concentrated in digital platforms, services and institutional infrastructure, with education accounting for 79.3% of the overall share, followed by livelihoods.



Building Agency

Knowledge, skills and safe participation

₹105.5 Cr | 65 projects | 27% in districts with Aspirational Blocks

Intervention Type	Funding share
Literacy & skilling	61.8%
Service hubs & entitlements	37.6%
Cyber safety	0.7%
Digital finance	0%

Agency funding is concentrated in literacy, skilling and assisted access, particularly in the sector of Rural Development, with limited funding yet reaching digital safety and financial participation.

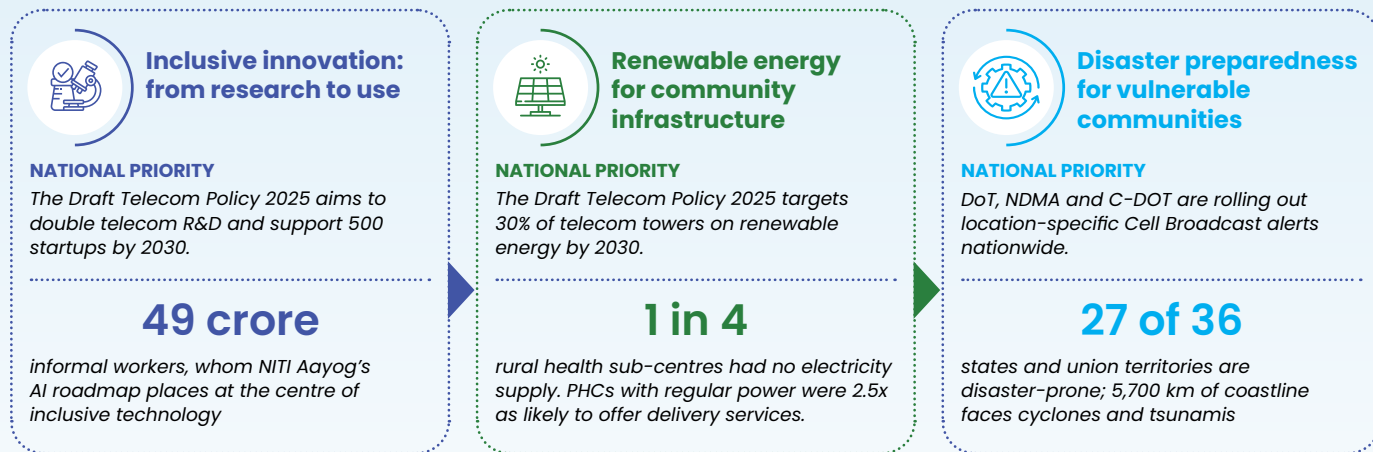
Note: Telecom projects were manually reviewed; national benchmarks are based on keyword-based identification from project descriptions and should be considered indicative.



**Telecom CSR has an opportunity
to address national priorities
where its business capabilities
can add distinctive value, such as
innovation, renewable energy and
disaster preparedness**



Telecom's **operating capabilities** can help communities leapfrog **traditional development pathways across 3 emerging national priorities**, informed by the DTP25 and related national initiatives



In each area, the sector can contribute more than capital, through its assets and expertise

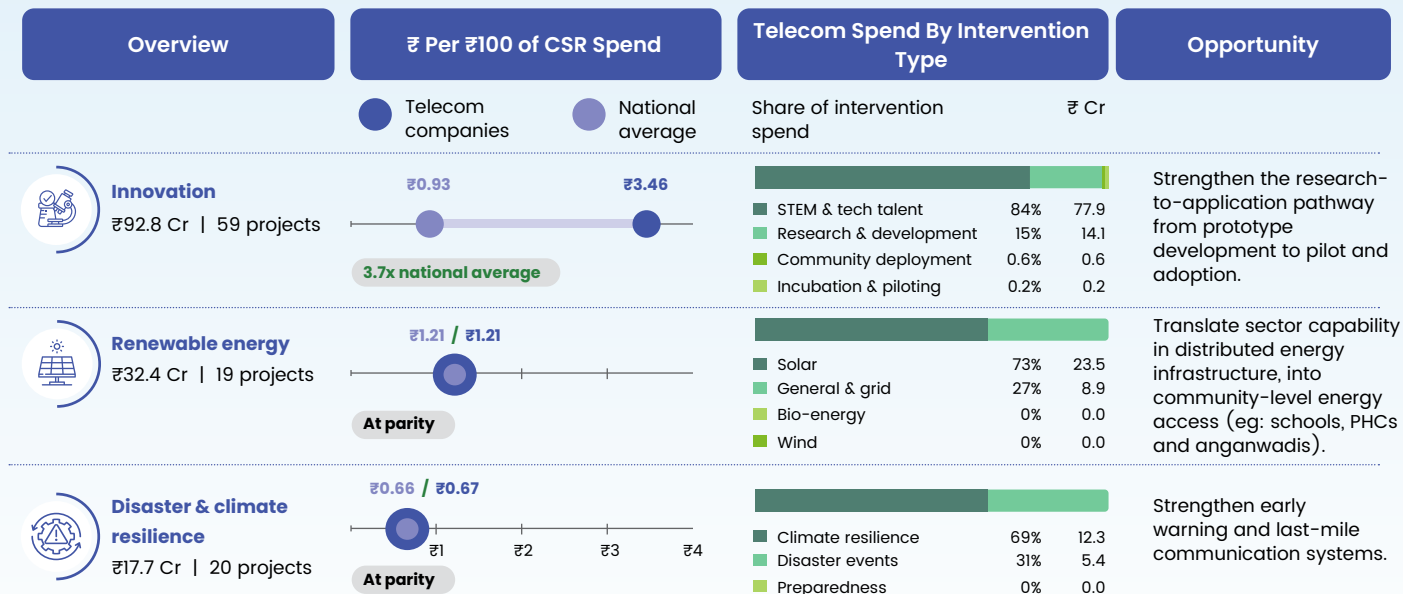
Telecom's
Distinctive
Capability

R&D labs & engineers	Live network testbeds	Off-grid power expertise	Solar-battery systems	Network reach
Chip & device design	Route to scale	Pan-India site footprint		Last-mile access



Telecom directs ~3.4x the national share of CSR to innovation, **but lesser reaches research, while renewable energy and disaster resilience receive less than the national average**

Telecom companies invested ~₹143 Cr across the 3 themes in FY23 to FY25 — **5.3% of their total CSR spend**



Note: Telecom projects were manually reviewed; national benchmarks are based on keyword-based identification from project descriptions and should be considered indicative.



Opportunities for the telecom sector to contribute to nation building





Sattva triangulated and identified the following **opportunities that telecom companies can leverage to contribute to nation-building through CSR**



Synchronise CSR investments to enable collective place-based outcomes

Target underserved geographies, including those with significant digital access gaps, by leveraging the networks and capabilities of telecom and telecom-adjacent companies.



Bring business capabilities to advance national development priorities

Apply the sector's technology, expertise and networks to materially aligned national priorities, enabling CSR to contribute more than capital to nation-building.



Leverage telecom's platform position to unlock multiplier impact across industries

Bring together CSR capital and capabilities of industries that rely on telecom infrastructure, such as Financial Services, IT and Media, to address shared development priorities and create multiplier impact.



Annexure





Methodology of CSR funding analysis

- The data analysis presented is based on data on CSR shared by Ministry of Corporate Affairs on the CSR web-portal (www.csr.gov.in), downloaded by Sattva as of July 2026.
- Industry categories used were based on the categorisation used by SEBI. Each company was categorised by Sattva based on public information available about the companies, using AI supported research. As per SEBI guidelines on categorising companies into these industries, the most important revenue source of the company was considered when they were involved in multiple business lines.
- 113 telecom companies were evaluated: telecom services (33), telecom equipment & accessories (16), consumer electronics (34), industrial electronics (30).
- CSR Projects were tagged to different categories based on a combination of the development sector tagging provided on the CSR portal and the project description available on the portal. These project descriptions are sometimes very limited and thus categorisation is not always possible.

