

Reliance Jio, the Game Changer in the Telecommunication Industry in India

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I. THE BACKGROUND

After the death of Dhirubhai Ambani in 2002, there were some major clashes between his two sons - Anil Ambani & Mukesh Ambani. After some public feud between both the brothers over the control of Reliance Empire, their mother intervened and split Reliance into two parts in 2005. After the split, Anil Ambani took over telecom, power, entertainment and financial services business and Mukesh Ambani took over Reliance Industries and IPCL.

Anil Ambani took over Reliance Communications but it was started by Mukesh Ambani and it was who revolutionized the Indian mobile industry by making mobile phones affordable to all Indians. Moreover, to prevent Mukesh Ambani from making another telecom company and competing with Reliance Communications, a non-compete clause was also mentioned in the agreement. But just the expiry of the non-compete agreement in 2010, Mukesh Ambani entered the mobile industry by acquiring 96% stake in Infotel Broadband. Infotel Broadband was later renamed Jio.

India has the second largest population of 1.2 billion in the world. It is a young nation with 63% of its population under the age of 35 years. India has a fast growing digital audience with approximately 800 million mobile connections and has over 200 million internet users.

Reliance Jio Infocomm Limited (RJIL)

Reliance believes in India's potential to lead the world with its capabilities in innovation and therefore it has envisaged the creation of a digital revolution in India. Reliance Jio's was launched commercially by Mukesh Ambani in September 2016 and it sent shockwaves across the entire telecom industry there and then only. Jio launched their services with incredible offers that include free 4G data, voice calls, and SMS for all the Jio customers. In addition, Jio announced that, Jio would never charge for voice calls and will offer data rates at lowest in the world.

Reliance Industries Limited (RIL) chairman Mukesh Ambani has dedicated Reliance Jio 4G services to the nation and has called it an effort to fulfill the dream of "Digital India" of our honourable Prime Minister Narendra Modi. Reliance Jio Infocomm Limited (RJIL), popularly known as Jio is a subsidiary of Reliance Industries Limited (RIL). Reliance Industries Limited is largest private sector company in India and is the first telecom operator to hold pan India Unified License.

Reliance Jio's Infrastructure

Reliance Jio invested ₹ 150,000 Crores into the fiber optic network. This investment is more than two times the combined investment of Airtel, Idea and Vodafone in the 4G segment. It has partnerships with eight global carriers British Telecom, Deutsche Telecom, Millicom, MTS, Orange, Rogers, TeliaSonera and Tim. Jio has successfully created the largest only 4G and LTE networks not only in India, but in the world.

1. Jio has 2,50,000 kilometers route of fiber optic cables and 90,000 eco-friendly 4G towers work to provide unmatched 4G coverage in all of India's 22 telecom circles. It has an initial end-to-end capacity to serve in excess of 100 million wireless broadband and 20 million Fibre-to-Home customers.

2. Jio has built approximately half-a-million square feet of cloud data centers and a multi-Terabit capacity international network. The large infrastructure has been built in partnership with some of the most technologically advanced companies in the world.

3. Reliance Jio is also the first telecommunication company to launch a 'VoLTE-only' (Voice over LTE) network in India. This technology removes the fluctuations in 2G/3G network for better connectivity and calls. While the existing network providers are using a modified 2G/3G infrastructure to provide 4G infrastructure in India.

4. Jio has created its network from scratch that offers higher bandwidth and faster speeds. Their networks are capable of handling 4G well. The Jio network is laid from future perspective and is capable of offering 5G and 6G connectivity in future.

Once you have built an entire network infrastructure, it really doesn't cost anything for the network provider to give you internet data.

Unlimited night data

The reason why most internet providers limit data services is basically because they do not have enough bandwidth to handle large data. But in the case of Jio, they have fiber optic network specially designed to handle 4G and which may also handle 5G or 6G in future. So, Jio does not have much data bandwidth problem. While other telecom companies primarily handle the voice calls and have limited data bandwidth. In addition, these companies do not own nationwide fiber network, so have to pay other companies as well in order to use their fiber network. This is the reason other companies don't usually provide unlimited plans.

However, Jio have the ability to practically provide truly unlimited data plans. This is the only reason why they have succeeded in reducing the prices by great margins.

Unlimited free voice calls

Jio has an advantage over other networks in this segment as well. It has an IP network and therefore, all voice calls go through the internet just like Skype. Thus, Jio sees no point in charging for voice anymore. The only costs Jio incurs in this segment is approximately 14 paise that have to be paid as interconnect fee to the operator's network the users call. This too is a temporary operational cost as TRAI is likely to reduce this interconnect fee or make it free in the near future.

Therefore, Jio has already laid down the fiber optic network; the cost of operating it is not very huge. Therefore, their only focus is to get more internet users. The fiber optic network makes it capable to handle amazing internet speeds.

Jio Strategy behind the LYF smartphones

Jio played a good marketing strategy by offering free unlimited preview offer only with the Lyf Phones. Nearly all of the lyf phones have very low specs compared to the competition at the price point they sell. The lyf phones sold only for the reason that these phones provided the unlimited internet and voice calls preview offer. This was a very clever move by Jio. The reason why there are so many versions of these phones is because of this business model:

1. Jio went to China and bought previous generation unsold 4G phones for cheap rates in large volume. This was a win-win situation for the manufactures as they could sell the unsold phones to Jio. This is oversimplification, they really do not have to buy old phones, and instead they need to just choose a manufacturer who is ready to build them phones with whatever previous generation components are cheaply available in the market. They currently have 5 manufacturers including ZTE and Intex.

2. These phones were re-labeled and sold in India. This is how they have several phones with totally different specs. A totally outdated phone which no one wanted to buy became everyone's favorite coupled with Jio preview offer. Jio sold these phones and made profit. In addition, it gave them the opportunity to test for bugs in their network and solve them on time. Besides, they got an attractive opportunity into the mobile device market.

Real Business Potential is in JioMobile Applications

Many people may consider the Jio applications to be useless and may install it. But there lies some real potential in Jio apps.

1. **JioTv, JioCinema&JioMusic:** The applications have the potential to become revolutionize the entire entertainment industry. The ability to watch Live TV channels, movies and listen music on smartphones is a practical idea, especially in India. This may become the most used applications in rural areas too in the coming time. None the less they can earn huge amount from these apps as the entertainment industry is huge. This has the potential to become the next big thing in India. This app gives the option to watch those serials and movies in HD quality legally for nearly free. It can benefit both the users and the producers.

2. **Jio Mags, JioNewspaper&JioXpressNews:** Jio Mags &JioNewspaper are magazine and newspaper apps respectively where popular magazines are available in eBook format. They can make any type of app in the

future and dominate that category with minimal efforts. JioXpressNews is an app that lets you catch breaking news, keep a track of stock market updates.

3. **JioMoney** - Payments industry in India and across the world has huge potentials. It is undoubtedly one of the biggest growing sectors and is set to touch \$500 billion by 2020. Paytm, Freecharge and Mobikwik are the key players in this sector. With JioMoney, the emphasis is to capture the growing market.

4. **JioCloud** - Dropbox, Google Drive, OneDrive are the market leaders in data storage industry. JioCloud is an offering from Jio. It is cloud storage service for people to store their digital data, share and recover anytime.

The apps are currently being offered for free till 2018 so that they can get maximum users to get addicted to these apps. Afterwards, they may start subscription charges for these apps. In addition, these apps are available only for Jio users. Thus, this will force other people into joining Jio.

Jio's Tariff Plans

Mukesh Ambani says the company is offering 4G data packs at lowest price compared to other players such as Bharti Airtel, Vodafone or Idea in the market. Mukesh Ambani has announced the "cheapest in the world".

Cheapest Plan

Let us try to understand the Tariff Plan of Jio. Suppose if you are a voice-only kind of person, then you would go for the Rs149 per 28 days plan, as you will get free unlimited voice calls. Here even if you are not directly paying for voice calls, you are paying at least Rs150 per month, thus their Average Revenue per user will be as good as the average revenue per user of the current players. But, what happens is that other telecom companies make the average revenue of Rs150 per month per user by charging not only for voice but also for SMS, data and roaming. Here, Jio will be making equivalent amount on average from each user even after providing SMS, roaming and voice calls for free. So, they are playing on attractive pricing strategies.

Smaller Plans

There are smaller plans at Rs19, 199 and 299 do not really offer any more value than their main plans as they have even less validity. The 299 plan only offers 21 day validity with 2GB data. This may be adequate for many people, but if you ever exceed the 2GB limit, then you will have to purchase 'add-on packs' and these add-on packs will have the validity of the main pack. So, if you recharge on day 20 of this plan, then you will get only one day validity for the add-on. For practical purposes, you will be spending more for lesser value through these packs. The Rs19 pack is useful for those who want to use some internet & voice calling once in a while.

The 499 Plan

Jio provides no plan between the Rs149 and Rs499. This is basically a psychological trick to make the user go for the Rs499 plan. Many users will compare the Rs499 plan with the smaller plan and see that you are getting unlimited 4G night data and choose at least the 499 plan. Now, again see that if you want to really use more than 4GB of 4G, then you have to spend double and move to the 999 plan.

Reliance Jio's Business Model.

Reliance Jio focuses on three major aspects i.e. broadband networks, affordable smartphones (Lycamobile phones) and the applications industry (JioTV, JioMusic, JioCloud etc.). The Business Strategy followed by JIO is as follows:

1. Lower the market rates by giving attractive discounts to the customers.
2. Be the market leader by offering huge discounts and distributing free SIMs
3. Achieve customer satisfaction by providing superfast internet with the help of fibre optic network
4. Grow your subscriber base
5. Recover your investment using the large customer base.

The five major pillars of Reliance Jio

Mukesh Ambani in the Annual General Meeting held on 1st September, 2016 of Reliance Industries Limited announced the five major pillars of Reliance Jio. These are:

1. **Network:** Mukesh Ambani said most of service providers have infrastructure for voice, but not for handling unlimited data. Since the company has its infrastructure based on optic fiber network, it wants to utilize this segment. He added that all IP design makes Jio are the most extensive and future-proof in the world. In addition, he said that Reliance Jio is the largest 4G networks and VoLTE network in the world today.

Through their strong network, they wish to transform India from a high price data market to one with the lowest data rates anywhere in the world.

2. Devices: According to Mukesh Ambani, more than 70 per cent of all smartphones in India are 4G LTE. It is evident that the Reliance Industries have been working on improving the number of devices to its customers in India. Mukesh Ambani announced addition to its LYF smartphone series in the Annual General Meeting, starting from Rs 2,999 to Rs 5,999.

3. Content: Mukesh Ambani made some important announcements regarding content for Jio TV and Jio's apps. Reliance's Jio emphasis on the content was also shared by Ambani. The apps of Reliance Jio such as JioPlay, JioBeats, JioMags, JioXpressNews, JioDrive, JioSecurity and JioMoney were made available to all users free till December 31, 2017.

4. Services: Reliance Jio aims to spread its service network all over the country in minimum time frame. With this aim, Jio came up with a redesigned sign-up process especially for Delhi and Mumbai. Through this RIL aims at making on-boarding experience simpler and give users a working connection with Aadhar card in only 15 minutes.

5. Tariffs: Mukesh Ambani, Chairman of Reliance Industries Limited said the company has always put customers first and thus, all the tariffs are built on three principles. First, customer should pay for only one service (voice or data). The data must be affordable to the customers. Pricing structure should be simple and affordable to the customers.

Jio's Market Positioning vis-à-vis Its Competitors

Reliance's Jio aims to position itself as a digital content company as against a mobile phone company to have the competitive advantage. Even the marketing campaign of Reliance Jio's are directed towards their content-driven strategies. Also at annual general meeting of Reliance Info Limited in June 2016, chairman Mukesh Ambani said the pricing of 300-400 a month would buy adequate data on the Jio for calling and Internet surfing. These rates are roughly a third of current market rates and thus impose potential threat to market leaders such as Airtel, Idea and Vodafone.

RIL also owns Network 18 which is one of the country's leading media groups that runs TV channels and produces films. Jio also has some popular applications such as JioChat, JioMoney, JioCinema and JioTVetc. In addition, Reliance has already signed distribution pacts with mobile companies such as LG, Lenovo, Micromax and Intex for the sale of Voice over LTE (VoLTE) handsets before the launch of Jio. These offers are doing way better than expected by anyone.

Impact of Reliance Jio on Customers and the Industry

The Users have benefitted with the help of huge reductions in their bills. Users of 3g/4g data have seen at least 50% reduction in bills, provided the data usage remains same as before. Moreover, the 4G network coverage is superior and offers better speeds at same price. Apart from that, 3 hours unlimited night usage, Wi-Fi hotspot access, free voice-calls, free sms, no-roaming charges, free access to live-TV and other apps etc. are some great benefits offered to the customers.

Reliance Jio has changed the telecommunication industry in India by providing end-to-end digital solutions for individuals, businesses, institutions and households and bridging the rural-urban divide. Indian needs more companies like Reliance to bring revolutionary changes to the industry. Companies like such increase the progress rate and improve the GDP of the country. It has also added more employment opportunities to millions of people. They have also revolutionized the mobile industry through LYF phones that are one of the cheapest 4G phones in the world. The Lyf phones have brought 4G to the homes of many people.

THE FUTURE

Jio has made their tariff plan in such a manner that most people will pay over Rs500 per month for 4G. This way Jio will be making way more money than the current players. Majority of high value customers will port to Jio due to faster speed and Jio might be able to acquire huge market share in next few years.

Jio is offering great value to its customer and will make huge profit compared to existing telecoms by pricing things differently. By adding on to the additional services, they are offering such as apps, devices, and fiber services, they will definitely win multiple business verticals. Their whole master plan is based on one single thing i.e. volume. Right now, they just need the numbers to become the leaders. Moreover, Jio's ambitions aren't only limited to mobile internet. Jio plans to make profits from its LYF phones, broadband internet offerings, and the mobile applications like JioMusic, Jio TV, Jio Cinema, JioDrive, JioMoney etc.

QUESTIONS FOR DISCUSSION

1. Do you think the current leading players in the market such as Airtel and Vodafone will be able to survive after the tough competition by Jio?
2. The telecommunication industry in India is huge. Do you think a relatively new player like Jio will have a huge impact on the future of the telecommunication industry more than the existing players in the long run?
3. Mukesh Ambani made such huge investments in Jio. Do you think it was a wise decision made by him at that point of time?
4. Sunil Bharti Mittal, Chairman Airtel stated 'Reliance Jio free offer is an unfair competition'. Comment on the statement.
5. Jio made huge losses in the short run. Do you think they can survive in the market in the long run?
6. Suggest some suitable strategies on behalf of Airtel and Vodafone to sustain their position keeping in view the aggressive strategies implemented by Jio.
7. JioMoney is another popular app installed by Reliance Jio. Do you think that they will be able to compete with established market leaders such as Paytm and Mobikwik?
8. Discuss the core competency of Reliance Jio. How have they played on it to get an advantage over the competitors?

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Exhibit 1



Reliance Jio's print ad promoting its introductory offer

Source: Internet

Exhibit 2



Source: Internet

Exhibit 3

CONTINUE UNLIMITED FUN FOR 1 YEAR 

- GET JIO PRIME @ Rs 99 (ONE TIME) &**
- RECHARGE WITH RS 303, TO GET UNLIMITED SERVICES**

MRP	₹ 149	₹ 303	₹ 499	₹ 999	₹ 1,999	₹ 4,999	₹ 9,999
Free Voice	Unlimited						
Local	✓	✓	✓	✓	✓	✓	✓
STD	✓	✓	✓	✓	✓	✓	✓
Roaming	✓	✓	✓	✓	✓	✓	✓
To all Operators	✓	✓	✓	✓	✓	✓	✓
Data (GB)	2	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Data at 4G Speed	2	28	56	60	125	350	750
FUP	-	1GB/day	2GB/day	-	-	-	-
SMS	100	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Local	✓	✓	✓	✓	✓	✓	✓
STD	✓	✓	✓	✓	✓	✓	✓
Roaming	✓	✓	✓	✓	✓	✓	✓
To all Operators	✓	✓	✓	✓	✓	✓	✓
Jio Apps Subscription	✓	✓	✓	✓	✓	✓	✓
Validity (Days)	28	28	28	60	90	180	360

ADD-ON VOUCHERS
In case you run out of data / voice benefits in the middle of the month, you can opt for an add-on voucher that boosts your existing pack.

MRP	₹ 11	₹ 51	₹ 91	₹ 201	₹ 301
Data(GB)	0.1	1	2	5	10
Validity	Works on base plan's existing validity				

T&C apply

Source: Internet

Exhibit 4

	S	M	M	L	XL	XXL	XXXL
JIO TARIFFS	Rs 149	Rs 499	Rs 999	Rs 1499	Rs 2499	Rs 3999	Rs 4999
FREE VOICE Unlimited Local STD Roaming to any network in India	✓	✓	✓	✓	✓	✓	✓
4G DATA	0.3GB	4GB + Unlimited 4G at Night	10GB + Unlimited 4G at Night	20GB + Unlimited 4G at Night	35GB + Unlimited 4G at Night	60GB + Unlimited 4G at Night	75GB + Unlimited 4G at Night
Jio Apps Subscriptions worth Rs 1,250	✓	✓	✓	✓	✓	✓	✓
Unlimited SMS*(L+N)	100	✓	✓	✓	✓	✓	✓
WIFI (JioNet Hotspot)	-	8GB	20GB	40GB	70GB	120GB	150GB
Validity of Pack (Days)	28	28	28	28	28	28	28

Source: Internet

Exhibit 5

How They Match Up

Jio Prime ₹303/month
 For prepaid and postpaid users
Data: 28 GB a month (with 1 GB daily cap)
Extra 5 GB If recharges done before March 31
Unlimited voice calls to all networks
Prime ₹303 users will enjoy benefits for a year If they opt before March 31

Vodafone India ₹342- 346/month (depending on circle)
 For prepaid users only
Data: 28 GB a month (with 1 GB daily cap)
Unlimited voice calls to any network
customers need to sign up by March 15 to get benefits for an undefined period
Vodafone yet to specify plan closure date

Airtel ₹345/month
 For prepaid users only
Data: 28 GB a month (with 1 GB daily cap)
customers opting for plan before March 31 will enjoy same benefits for next 11 months

Idea Cellular ₹348/month
Data: 14 GB a month (with 500 MB daily cap)
Unlimited voice calls to all networks
 Segmented offer targeted at non-data users with 4G phones
Idea is yet to specify closure date of its ₹348/month plan

Source: Internet

Exhibit 6

Surf more, pay less: The big internet price war!

Reliance Jio's debut and attractive pricing has put pressure on competitors.



Attractive pre-paid data offers



Attractive data call packages



Superior 850 MHz band for app-to-app call

airtel

- Slashes pre-paid 4G prices by up to **80%**
- Cuts corporate data rates by up to **60%**



HOW OTHERS ARE FIGHTING RELIANCE JIO

BSNL
Connecting India

- Now providing **1GB (3G only)** at ₹198
- Total adds to ₹2,574 for 13GB on 3G for 12 months

vodafone

- Now providing **1GB data (3G/4G)** for ₹ 297 – valid for 28 days
- Total adds to ₹3,861 for 13 GB in 12 months

Idea

- Now providing **1GB (3G only)** at ₹249 for 28 days
- Total adds to ₹3,237 for 13 GB in a year

Note – All packs mentioned are for 28 days. In a year, 13 packs would have to be purchased.

FOR MORE INFOGRAPHICS DOWNLOAD TIMES OF INDIA APP

Source: Internet

Exhibit 7

Take A Call

Reliance Jio starts bundling 4G SIMs with Lyf phones for all customers



4G

Jio's 4G SIMs to come bundled with free unlimited data for **3 months, 4,500 min** of voice calls

Jio's SIMs being sold by Reliance Digital stores and other large-format retail stores in major cities (Delhi, Mumbai, Chennai and Bengaluru) and some smaller cities

Has also launched **Jio.com**, where consumers can register directly and get Jio mobile connections

Site previews app-based content; allows users to recharge account

Source: Internet

Exhibit 8



Free voice calls and roaming services

Data would be charged at one-tenth of the prevailing market rates

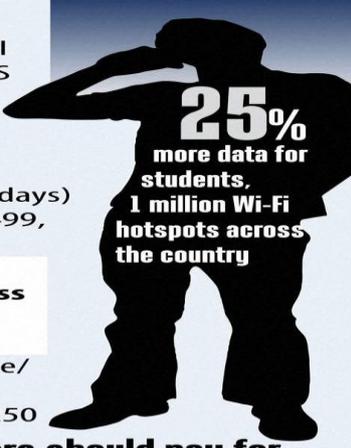
Data rates per GB (in US\$)	
Japan	30
Korea	18
China	15
Spain	7.5
S Africa	6
India	3.5
Jio (est)	1

Reliance Jio Now no charges for voice calls

- 10 monthly plans to customers, **starting at Rs 149**: free voice (local and STD), free roaming and 100 SMS along with 0.3 GB of 4G data
- Effective rates-Rs 50/GB**, Rs 25/GB for more use
- Rs 4,999 plan: 75GB of 4G data, unlimited 4G access at night (for 28 days)
- Other plans: Rs 499, Rs 999, Rs 1,499, Rs 2,499, and Rs 3,999
- All plans (excluding Rs 149)- **free unlimited SMSes, WiFi access** (with varied amounts of usage) from JioNet Hotspots
- Voice call charges: existing 65 paise/minute, Jio: free
- Data charges: Existing around Rs 250 /GB, Jio: Rs 50/GB

No blackout days such as Diwali and New Year

'Free welcome offer' starting September 5 (free data, voice and video till Dec 31, 2016)



25% more data for students, 1 million Wi-Fi hotspots across the country

Customers should pay for only one service, either voice or data. Not both

Source: Internet

Exhibit 9

The Price War Intensifies

	JIO 303	AIRTEL 345	VODAFONE 346	IDEA 348	BSNL 339
VALIDITY	28 DAYS	28 DAYS	28 DAYS	28 DAYS	28 DAYS
Recharge type	Jio prime plan for all users	Segmented offer initially- to be rolled out for everyone	Segmented offer	Segmented offer	For all BSNL users
Voice - Local, STD, On-net calling, off net calling	Unlimited	Unlimited	Unlimited with FUP 3000 minutes/day, 12,000 min/week	unlimited	unlimited BSNL to BSNL calls
Data	28 GB- 1GB per day - after hitting the daily limit speed will reduce 128 kbps	28 GB - 0.5GB in day 0.5GB in night (12 AM- 6 AM)	1 GB per day (28 GB a month) and 4p/ 10 kb as pay you go rates	500 MB per day (14 GB day) and 4p/ 10 kb as pay you go rates	2GB per day (56 GB a month)
Additional benefits	5 GB on all recharges before April 15, 2017*		Double data & validity one time on first time payout of Rs 346 before March 15, 2017	N/A (#See footnote)	

*Jio Prime recharge date extended till April 15, customers to get free services for three months till June-end, Jio Prime tariff plans start in July

Source: Internet

Exhibit 10



Source: Internet

Mr. Shiv Gupta, “Reliance Jio, the Game Changer in the Telecommunication Industry in India” *IOSR Journal of Business and Management (IOSR-JBM)*, Vol.25, No. 02, 2023, pp. 10-19.