

# OPTIC FIBRE CABLE MARKET IN INDIA 2020

Market Trends, Growth Drivers and Demand Outlook

❖ Report (PDF)

## The Optic Fibre Cable Market in India report will help you to:

- ❖ Assess the OFC requirement and emerging opportunities
- ❖ Learn about the various policies/regulations governing OFC infrastructure development in India
- ❖ Understand the current demand-supply dynamics and key demand drivers
- ❖ Gauge the impact of key government and private sector initiatives
- ❖ Gather information on emerging business models, technologies, and deployment trends
- ❖ Identify major stakeholders, their current initiatives and future plans
- ❖ Gain outlook for OFC demand in India over the next few years

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Surging data consumption, expanding fixed home broadband market and The emergence of next-generation technologies have created significant demand for optical fibre cable (OFC) infrastructure in the country. Despite challenging times, OFC roll-out has remained a key focus area for telcos to future-proof their networks. Site fiberisation is imperative for 4G massification and crucial for 5G readiness. Meanwhile, significant OFC investments are also taking place at the last mile in FTTx deployments. The government has identified big targets for fiberisation under NDCP 2018 The needs to be met in the next two years. All these developments fare well for the OFC demand landscape. In fact, several non-telco stakeholders such as towercos and utilities are preparing to take up bigger role in fibre deployment.

## Summary and Key Insights

### SECTION I: MARKET OVERVIEW, POLICY LANDSCAPE AND GROWTH DRIVERS

#### 1. Market Snapshot and Key Trends

- ❖ Size and Growth
- ❖ Deployment Status
  - By Industry Players
  - Under Government Programmes
- ❖ Growth Drivers
- ❖ Impact of Sector Consolidation and Financial Crisis
- ❖ Key Issues and Challenges
- ❖ Emerging Trends and Opportunities
- ❖ Future Outlook

#### 2. Impact of Policies and Regulations

- ❖ NDCP 2018
  - Policy Provisions and Objectives
  - Execution Timelines and Status
  - Impact on OFC Demand
- ❖ RoW Rules
  - Implementation Status
  - State-wise Charges
- ❖ State Policies
- ❖ TRAI Recommendations and Consultations
- ❖ Policy and Regulatory Gaps
- ❖ Industry Expectations

#### 3. Emerging OFC Use Cases and Demand Drivers

- ❖ Backhaul Upgrades
  - Tower Fiberisation for 4G and 5G
  - Fiberisation for Small Cells

#### ❖ Last Mile Fiberisation

- FTTx
- IBS and Wi-Fi

#### ❖ New Use Cases (AI/ML, IoT, ML, Industry 4.0, AR/VR, Connected cars, telemedicine, real time monitoring etc.)

#### 4. Demand and Supply Projections and Analysis

- ❖ Data Consumption - Growth Trends and Forecasts
- ❖ Projected Requirement by Industry Players
- ❖ Projected Requirement by Other Consumer Segments
- ❖ Projected OFC Requirement from Government Targets
- ❖ Capacity Expansion Plans
- ❖ Demand-Supply Gap Analysis

### SECTION II: GROWTH DRIVERS - KEY CONSUMER SEGMENTS AND REQUIREMENTS

#### 5. Telcos and Towercos

- ❖ Current Status of OFC Deployment
- ❖ Emerging Business Models (OFC sharing, Independent fibrecons, JVs, neutral hosts)
- ❖ Telcos Profiles (Bharti Airtel, Vodafone Idea, Reliance Jio, BSNL/MTNL)
  - Data Traffic on Network
  - Current OFC Network Size
  - FTTH Offerings
  - Key Contracts and Collaborations
  - Future Plans and Requirements
- ❖ Towercos Profiles (Indus-Bharti Infratel, ATC India, TowerVision, etc.)
  - Current Focus Areas
  - Level of Site Fiberisation
  - Future Plans and Requirements

**6. Government Programmes**

- ❖ BharatNet
  - Project Overview
  - Progress under Phase II
  - Upcoming Tenders and Purchase Orders
  - Implementation Roadblocks
  - Opportunities for Private Stakeholders (Telcos and Suppliers)
- ❖ Smart Cities
  - Role of OFC
  - City-wise Update on OFC Implementation and Planning
  - Applications and Use Cases
  - Contracts Awarded and Planned
- ❖ Network for Spectrum Project
- ❖ State-level Projects and Initiatives
  - MahaNet
  - AP FibreNet
  - TamilNet
  - GujaratNet
  - KFON
  - Telangana T-Fiber, etc.

**7. Fixed Home Broadband Market**

- ❖ Trends in Content Consumption
- ❖ Type of Applications and Service Offerings
- ❖ Evolving Competitive Landscape
- ❖ Profiles of Key Players/Internet Service Providers - Network Size, Key Offerings, and Expansion Plans

**8. Utilities - Power, Oil & Gas and Railways**

- ❖ Role of OFC
- ❖ Profiles of Key Utilities - Network Size, Expansion Plans and Key Contracts
- ❖ Emerging Models/Practices for Monetising OFC
- ❖ Opportunities for Industry Stakeholders

**9. Other Key and Emerging Segments**

- ❖ MSO/Triple Play Service Providers
- ❖ IT sector (Requirement in Data Centres, Internal Networks of Large Enterprises, etc.)
- ❖ Large Enterprise Businesses (Healthcare, BFSI, etc.)

**SECTION III: SUPPLY CHAIN ANALYSIS - PRODUCTION, TECHNOLOGY AND COST TRENDS****10. Production Capacity Trends**

- ❖ Growth in Production Capacity
- ❖ Focus on Make in India
- ❖ Policy Impetus
- ❖ Export-Import Scenario
- ❖ Key Challenges
- ❖ Future Outlook

**11. Cost and Technology Trends**

- ❖ Key Products and Solutions (Single/Multi-Mode, Plastic Optic Fibre, Macrobend Fibre, etc.)
- ❖ Deployment and Installation Practices
- ❖ Emerging Technology Trends
- ❖ Key Cost Components, Duties and Taxes
- ❖ Materials and Pricing Trends
- ❖ Focus on R&D

**12. Key Supplier Profiles**

- ❖ Aksh OptiFibre Limited
- ❖ Birla Cable Limited
- ❖ CommScope
- ❖ Corning
- ❖ Finolex Cables Limited
- ❖ Himachal Futuristic Communications Ltd.
- ❖ Paramount Communications Limited
- ❖ Polycab
- ❖ STL
- ❖ UM Cables Limited
- ❖ Uniflex Cables
- ❖ Vindhya Telelinks Limited
- ❖ West Coast Optilinks

*(Each player profile will give an overview of the company's operations, focus areas, current production capacity, manufacturing facilities, key projects and tenders, financial performance, capex and expansion plans)*

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