

15th Edition

TELECOM INFRASTRUCTURE IN INDIA

A VIRTUAL CONFERENCE

Growth Drivers, Emerging Business
Models and Future Outlook

March 18-19, 2021



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OFC NETWORKS IN INDIA

A VIRTUAL CONFERENCE

Growth Strategies, Emerging
Opportunities and Market Outlook

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TELECOM INFRASTRUCTURE IN INDIA

Mission

- The Indian telecom infrastructure industry has demonstrated great strength and resilience in managing massive data loads during the Covid pandemic in 2020. Despite the data consumption peaking at 12 GB per user per month, the telecom networks did not fail even for a day.
- The pandemic has accelerated the adoption of next-generation technologies such as automation and virtualisation, and has given a new impetus to indoor connectivity, creating a robust demand for digital infrastructure. These trends will continue to shape the sector in a post-Covid world as well, and IP-1s are geared up to seize this opportunity.
- In recent years, towercos have shifted their business focus from traditional offerings to new and emerging areas such as fibre, small cells, Wi-Fi, IoT, smart poles and data centres, in a bid to become end-to-end digital infrastructure providers. This has helped towercos in strengthening their position in the evolving digital value chain, with greater participation in programmes like Digital India and the Smart Cities Mission.
- Telecom towers today can host several digital components such as smart LED lights, Wi-Fi access points, cameras for surveillance, active geo-location transponders for location-based services, sensors for air quality monitoring, electric vehicle charging points, advertisement billboards, etc., all on a single structure.
- Smart solutions are also being leveraged for improving the site O&M. Automation, real-time monitoring of sites, use of data analytics are some of the emerging trends that are helping in the efficient management of site operations, reduction of fuel pilferage and optimisation of energy consumption.
- 5G is no longer a hyped technology. It is being rolled out across the world, and is likely to come to India very soon. 5G will require massive network densification - more number of towers at shorter distances, at least 80 per cent of site fiberisation, and tens of thousands of small cell deployment. It will also require a strong network of edge data centres. Towercos can house and manage such edge data centres on their sites given their experience in managing distributed infrastructure assets.
- Going forward, towercos should focus on taking up the role of neutral hosts to provide end-to-end infrastructure to multiple telecom operators and service providers in a non-discriminatory, transparent and cost-effective manner. This will support telcos and service providers in network expansion, particularly 5G proliferation, and help accelerate the roll-out of in-building solutions like FTTx, Wi-Fi, DAS and small cells.
- It is important for the government to provide its support to industry stakeholders by enhancing the role of IP-1s, thus allowing active infrastructure sharing, and streamlining right-of-way (RoW) processes, all of which will be critical for an aggressive infrastructure roll-out.
- In March 2020, TRAI had recommended enhancing the scope of IP-1s, allowing them to deploy active components such as fibre, antennae and Wi-Fi to encourage and facilitate the creation of a common shareable active infrastructure. These recommendations still await a nod from the Department of Telecommunications.
- Further, the tardy implementation of the NDCP 2018 has been a cause for concern for industry stakeholders. The policy elucidates some game changing practices such as the Fibre First initiative and Broadband for All. Thus, its expeditious and effective implementation is crucial for the industry. Similarly, the poor state-level alignment with the RoW Rules, 2016, must be addressed urgently so as to guard IP-1s against exorbitant charges and complex procedures.
- **The mission of this virtual conference is to highlight critical telecom infrastructure-related issues, assess new and upcoming opportunities, and discuss the initiatives required to achieve India's ambitious broadband targets. It will also provide industry stakeholders a platform for sharing experiences, and showcasing the latest innovations and technologies.**

AGENDA/STRUCTURE

SECTOR TRENDS: FROM TOWERCOS TO NETCOS

This session will feature a presentation by a leading consultant

- ❖ What are the key emerging trends in the telecom infrastructure industry in India?
- ❖ What is your outlook for technology/digital infrastructure acceleration in the post-Covid era?
- ❖ What should be the key priorities and focus areas for towercos in the coming years? What are some of the key emerging business models for the industry?

KEYNOTE SESSION I: INDUS TOWERS' PERSPECTIVE

This session will feature an address/presentation by a senior spokesperson from Indus Towers

- ❖ What are the key trends shaping the Indian telecom tower industry?
- ❖ What has been the progress on the integration of Indus Towers' and Bharti Infratel's operations/businesses post merger? What are the synergies that you are looking to tap?
- ❖ What will be the key focus areas and growth strategies for the merged entity in 2021?

KEYNOTE SESSION II: ATC'S PERSPECTIVE

This session will feature an address/presentation by a senior spokesperson from ATC India

- ❖ How has the Indian telecom infrastructure space evolved over the years?
- ❖ What are the key challenges that continue to plague the Indian telecom tower and infrastructure industry? How can these be addressed?
- ❖ What are ATC India's key focus areas for the next two years?

SPECIAL SESSION WITH DoT ON GOVERNMENT PROGRAMMES AND POLICIES

This session will feature remarks by a senior representative from DoT

- ❖ What is the government's perspective on the progress in telecom infrastructure roll-out in India?
- ❖ What are the various programmes and initiatives being undertaken to enhance connectivity and facilitate broadband proliferation?
- ❖ What has been the progress under BharatNet?

TELCO PERSPECTIVE: NETWORK EXPANSION AND INVESTMENTS

This session will feature remarks by senior representatives from telecom operators

- ❖ What is your current network size? What are your key telecom infrastructure initiatives?
- ❖ What are the key infrastructure-related requirements for 5G roll-out? What are your views on industry readiness for 5G?
- ❖ What are the key challenges in rolling out infrastructure?
- ❖ What are your network expansion and investment plans for the coming years?

IN-BUILDING CONNECTIVITY - FOCUS ON DAS, SMALL CELLS, FTTX AND WI-FI

This session will feature remarks/presentations by senior representatives from TRAI, IBS providers, telcos

- ❖ What is the potential of in-building solutions, especially as working from home becomes the new normal? What is the current status of roll-out?
- ❖ What are the issues and challenges in implementing these solutions?
- ❖ What are your views on the policy and regulatory environment? What is the market outlook?

ACTIVE INFRASTRUCTURE SHARING

This session will feature remarks/presentation by a leading regulatory expert

- ❖ What are the resolved and unresolved challenges related to active infrastructure sharing?
- ❖ What is the cost economics of active infrastructure sharing? What has been the industry experience?
- ❖ Is the regulatory environment conducive for such sharing in India?

BUILDING 5G NETWORKS

This session will feature remarks/presentations by senior representatives from leading network and technology vendors

- ❖ What is the industry readiness for 5G roll-out? What are the realistic timelines and investment requirements?
- ❖ What are the key use cases from India's perspective?
- ❖ What are the key technology and infrastructure trends that will shape the 5G landscape in India?

EMERGING GROWTH AREAS: FOCUS ON SMART POLES AND EDGE DATA CENTRES

This session will feature remarks/presentations by a senior representative from a leading towerco and/or an industry expert

- ❖ What are some of the non-core opportunities, such as smart poles, EV charging points and surveillance, being explored by the industry?
- ❖ What is the economic case for co-locating data centres at tower sites?
- ❖ What are the key issues and challenges in implementing these solutions? What is the market outlook?

SMART CITIES: REQUIREMENTS OF SMART COMMUNICATION NETWORKS

This session will feature remarks/presentations by senior representatives from smart city administrations and towercos

- ❖ What are the communication infrastructure needs and requirements under the Smart Cities Mission? What are the key opportunities for telecom players?
- ❖ What has been towercos' experience under the mission?
- ❖ What are the key challenges in telecom infrastructure deployment for such projects?

TELECOM INFRASTRUCTURE IN INDIA

AGENDA/STRUCTURE

ENERGY MANAGEMENT AND OPTIMISATION

This session will feature a panel discussion among senior representatives from towercos and energy solution providers

- ❖ What are the current energy consumption and management trends in the telecom infrastructure space?
- ❖ What are the current practices adopted by towercos to ensure energy efficiency?

SITE O&M: ROLE OF TECHNOLOGY

This session will feature remarks/presentations by technology consultants and solution providers

- ❖ What is the current state of adoption of technology solutions such as automation, remote monitoring and analytics by telecom infrastructure providers in India?
- ❖ What are the key emerging trends in this space? What is the future outlook?

ROW: CURRENT STATUS AND THE WAY FORWARD

This session will feature a presentation from a leading policy/regulatory expert

- ❖ What is the current status of implementation of RoW rules across states?
- ❖ What are the key issues and challenges?
- ❖ How can the telecom industry work in collaboration with various departments to resolve the issues?

EVOLVING PUBLIC WI-FI LANDSCAPE

This session will feature a presentation from a leading policy/regulatory expert

- ❖ How has the public Wi-Fi segment evolved in India? What are the key growth drivers?
- ❖ How will the PM WANI initiative likely to increase internet penetration?
- ❖ How can the telecom industry collaborate to enhance broadband proliferation?

SITE FIBERISATION

This session will feature remarks by senior representatives from towercos and industry experts

- ❖ What is the current level of tower site fiberisation in the country? What will be the key drivers?
- ❖ What are the key challenges? How can these be addressed?

STATE FOCUS: UPDATE ON TELECOM INFRASTRUCTURE INITIATIVES

This session will feature remarks/presentations by heads of state technology departments

- ❖ What are the key telecom infrastructure initiatives taken in your state? What are your future plans in this regard?
- ❖ What are the key highlights of your telecom infrastructure policy?
- ❖ What are the opportunities for telecom infra providers?

Previous Participants

The participants in the previous conference on "Telecom Infrastructure in India" included: ACE Enterprise, Aceline Infosolutions, ACME Cleantech Solutions, Aksh Optifibre, Amara Raja Batteries, Analysys Mason, Anritsu, Apar Industries, Applied Solar Technologies, Ardom Telecom, Arvind, Ascend Telecom Infrastructure, ATC India Towers, B4S Solutions, BBNL, Bharat Sanchar Nigam Limited, Bharti Infratel, Birla Cable, Birla Furukawa, Black & Veatch, BMR Advisors, Broadband India Forum, Capitel Partners, Care Rating, CESC, China Telecom, COAI, Copius Capital Advisors LLP, Corning Technologies India, Coslight India Telecom, CRISIL, Cummins, Customized Energy Solutions, Cyient, Delta India Electronics, DMRC, DOT Ministry of Communication, DSM India, ECI Telecom, Edotco Group, Emerson Network, Enersys India Batteries, Enterprise Ireland, Ernst & Young LLP, Essential Energy India, Evalueserve, Exide, Finolex, Firefly Networks, GAIA Smart Cities, GE Grid Solutions, GTL Infrastructure, HBL Power, Huawei India, Huber Suhner, IBUS Networks, ICICI Bank, Idea Cellular, IDFC Alternatives, IDFC Bank, IIFCL, Indus Towers, Infokool, Infozech, Intelligent Energy, Invendis Technologies India, JLL, Karam Industries, Keith Electronics, Khika, Kirloskar Oil Engines, Kotkar Energy Dynamics, KPMG, L&T Construction, L&T ECC, Lekha Wireless, Lifeline Technologies, MACOM Technology Solutions, Mahindra & Mahindra, Manifold, Microtex Energy, Ministry of Housing and Urban Affairs, Morrison Hershfield Corp, Motilal Oswal, MTNL, NEC Technologies India, Nokia India, Okaya Power, OMC Power, Owens Corning, Panasonic India, Paramount Cables, Paramount Communication, Polycab, PowerGrid, Pratap Technocrats, Protiviti, PRS Permacel, Quadgen Wireless, Quality Austria Central Asia, Ramboll, RBC Capital Markets, Reliance Jio Infocomm, Rosenberger Electronic Co., Rustomjee, RV Solutions, SBI Capital Markets, Secure meters, SEI Trading, Sify, Sikora India, Simco Group, Space TeleInfra, Spaceworld, Spectranet, Speedon Networks, Sterlite FTTH, Sterlite Technologies, STL, Suyog Telematics, Svarn Group, Synergy Telecom, Tafe Motors, TAIPA, Tarantula, Tata Communication, TCIL, Techlineage, Technica Associates, Tek Components, Telecom Network Solutions, Telecom Regulatory Authority of India, TelEnergy Technologies, Telesonic Networks, Tirumala Seven Hills, Tower and Infrastructure Providers Association, Tower Vision, Trading Engineers (International), Ubico Networks, Universal Cables, V & V Comptech Systems, Vanu India, Vertiv, Viavi Solutions, Videocon Telecom Tower, Vindhya Telelinks, Viom Networks, Virgo Consultants, Vodafone Idea, West Coast Optilinks, etc.

OFC NETWORKS IN INDIA

Mission

- High-speed connectivity requirements have become more apparent during the Covid-19 pandemic, as the demand for faster internet access has surged, especially in the residential sector.
- With millions of people working from home or from remote locations throughout 2020, fibre-based broadband gained fresh impetus owing to better speed and reliability. There has also been a considerable increase in the deployment of in-building solutions such as Wi-Fi and small cells to improve indoor connectivity, which, in turn, has created demand for fiberised backhaul.
- As a result, the telecom sector is investing in fibre network expansion more than ever before.
- Large-scale fiberisation will continue to be one of the key sector trends in 2021 and beyond. The fact that India's current fibre penetration stands at less than 30 per cent for tower sites and a mere 7 per cent for households indicates the segment's huge potential.
- Emerging technologies like industrial IoT, connected mobility, smart homes and gadgets are all heavily reliant on hyper connectivity, and will require strong fibre support for their proliferation.
- 5G, which is anticipated to be rolled out between this year and the next, will require a massive upgrade of the country's existing OFC networks to deliver on its promise of high speed and low latency. The industry will see the installation of a large number of towers at shorter distances, deployment of thousands of small cells, and setting up of an extensive network of edge data centres, all of which will require fibre-supported backhaul.
- The government has already emerged as the key contributor to OFC demand in India. Programmes like Digital India and Smart Cities rely on fibre connectivity to function seamlessly. The BharatNet project was conceived to take broadband to the country's hinterland by laying an extensive OFC network across 250,000 gram panchayats. With the project nearing completion by August 2021, the government has already announced its plans to extend OFC connectivity to each of the 600,000 villages in India over the next three years.
- Estimates suggest that the extent of fibre roll-out over the next few years will require investments of around Rs 2.5 trillion by the industry. Given the telcos' investment constraints, the industry may see several non-telco stakeholders taking up a bigger role in fibre deployment. For instance, towercos are well positioned to leverage the fibre opportunity, with their existing experience of managing distributed infrastructure assets.
- TRAI has given recommendations for expanding the scope of services allowed under the IP-1 registration. It is likely that IP-1 players will be allowed to offer active components such as lit fibre to telcos. Utilities in the power, gas, water and railway sectors that are already deploying fibre networks can operate as neutral wholesale providers for telcos.
- Fibre network sharing will also result in significant capex savings for industry. The government is considering common ducts/utility corridors for laying OFC along with other essential infrastructure such as gas and water utilities. Encouraging synergies with essential infrastructure on standards such as GIS mapping and dig once will also go a long way in resolving the fibre deployment issues.
- The industry has also been requesting for uniform RoW across states as well as a framework for legal recourse and insurance against OFC disruption and damage.
- On the supply side, innovation and research and development (R&D) will be crucial to match the burgeoning demand for OFC. The industry is already exploring new designs and standards for network optimisation. The government's Atmanirbhar initiative will further give the much needed fillip to OFC manufacturers in the country.
- **The mission of this conference is to highlight the new growth drivers and opportunities for OFC in India, discuss potential business models and applications, study the impact of key government and private sector initiatives, and showcase the latest innovations and most promising technologies. The conference will also provide a platform for telecom service providers, tower companies, policymakers, OFC manufacturers and technology providers to share their experiences and exchange ideas.**

AGENDA/STRUCTURE

STATE OF THE INDUSTRY POST COVID-19

This session will feature a presentation by a leading consultant

- ❖ What is your outlook for OFC infrastructure acceleration in the post-Covid era?
- ❖ What are the emerging business models?
- ❖ What are the key challenges and future outlook?

KEYNOTE SESSION: PROGRESS ON BHARATNET

This session will feature remarks by a senior representative from BBNL

- ❖ What has been the implementation experience of Phase II? What has been the progress so far?
- ❖ What are the key challenges? How are they being addressed?
- ❖ What are the opportunities for the private sector?

SPECIAL SESSION WITH DOT ON GOVERNMENT PROGRAMMES AND POLICIES

This session will feature remarks by a senior representative from DoT

- ❖ What is the government's perspective on the progress in telecom infrastructure roll-out in India?
- ❖ What are the various programmes and initiatives being undertaken to enhance connectivity and facilitate broadband proliferation?
- ❖ What are the key challenges in infrastructure roll out? How can these be addressed?

TELCO PERSPECTIVE: NETWORK EXPANSION AND INVESTMENTS

This session will feature remarks/presentations by senior representatives from telcos

- ❖ What is the current status of OFC deployments? What are the expansion plans?
- ❖ What are the key infrastructure-related requirements for 5G roll-out? What are your views on the industry's 5G readiness?
- ❖ What are the expectations from OFC suppliers?

OFC FOR 5G

This session will feature remarks/presentations by senior representatives from leading network and technology vendors

- ❖ What is the industry readiness for 5G roll-out? What are the realistic timelines and investment requirements?
- ❖ What are the key use cases from India's perspective?
- ❖ What are the key technology and infrastructure trends that will shape the 5G landscape in India?

FIBRE TO THE X

This session will feature remarks/presentations by senior representatives from telcos, technology providers and leading ISPs

- ❖ What is the current status of last mile OFC deployments by the industry?
- ❖ What are the key drivers for FTTH uptake?
- ❖ What are the key challenges and outlook?

TOWER SITE FIBERISATION

This session will feature remarks by senior representatives from towercos, technology providers and industry experts

- ❖ What is the current level of tower fiberisation in the country? What are the key challenges?
- ❖ What role will fiberisation play in preparing for a 5G ecosystem?
- ❖ What are the key challenges? What is the future outlook?

DESIGN, DEPLOYMENT AND MAINTENANCE

This session will feature remarks/presentations by senior representatives from solutions providers/suppliers

- ❖ What are the various network designs and deployment models being practised in India?
- ❖ How are the service providers ensuring network optimisation?
- ❖ What are the challenges in route survey, planning & maintenance of such networks?

KEY CONSUMER SEGMENTS: DEFENCE, RAILWAYS AND UTILITIES

This session will feature remarks/presentations by senior representatives from RailTel, Ministry of Defence, power and gas utilities

- ❖ What is the current size of the OFC network?
- ❖ What are the expansion plans?
- ❖ How is this network being monetised?
- ❖ What are the key issues and challenges?

FOCUS ON SMART CITIES

This session will feature remarks/presentation by leading technology consultants and senior representatives from Smart City administrations

- ❖ What are the communication and OFC needs and requirements under the Smart Cities Mission?
- ❖ What has been the progress and level of investment so far?
- ❖ What are the key challenges in OFC deployment for such projects?

OFC NETWORKS IN INDIA

AGENDA/STRUCTURE

SUPPLY-SIDE DYNAMICS: MANUFACTURING ECOSYSTEM

This session will feature a panel discussion among senior representatives from leading OFC manufacturers and suppliers

- ❖ What is your current manufacturing capacity? What are your expansion plans?
- ❖ What are the key industry concerns on the policy and regulatory front?
- ❖ What will be the key drivers of OFC uptake in India? What is your outlook for the market?

STATE FOCUS: KEY INITIATIVES AND PLANS

This session will feature remarks/presentations by heads of state technology departments

- ❖ What are some of the state-wide fibre projects being rolled out/planned?
- ❖ What are the key growth drivers?
- ❖ What applications are riding on such networks?

PRODUCT AND TECHNOLOGY SHOWCASE

This session will showcase presentations by technology and solution providers

- ❖ What are the latest technology initiatives in the OFC space globally?
- ❖ What are the new product offerings for Indian companies?
- ❖ What are the benefits of these technologies?

BACKHAULING FOR WI-FI AND SMALL CELLS

This session will feature remarks/presentations by senior representatives from IBS providers and technology providers

- ❖ What is the opportunity in the Wi-Fi and small cell space in India?
- ❖ What are the backhaul technology requirements for Wi-Fi & small cells?
- ❖ What are the key challenges?

RoW: CURRENT STATUS AND THE WAY FORWARD

This session will feature presentation from a leading policy/regulatory expert

- ❖ What is the current status of implementation of RoW rules across states?
- ❖ What are the key issues and challenges?
- ❖ How can the telecom industry work in collaboration with various departments to resolve the issues?

Previous Participants

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Target Audience

- The conferences are targeted at top and middle-level managers from:

- | | | |
|--|---|--|
| -Telecom operators | -Other investors | -4G service/solution providers |
| -Telecom tower manufacturers | -Policymakers and regulators | -Power solution providers |
| -5G technology providers | -Infrastructure equipment manufacturers | -Infrastructure service providers |
| -Energy efficient technology providers | -Technology providers | -Legal and management consultants |
| -Broadband service providers | -Energy management consultants | -Engineering design consultants |
| -Supporting infrastructure companies | -Civil contractors | -Industry analysts |
| -Financial institutions | -Renewable energy companies | -Infrastructure developers |
| -Wireless internet service providers | -OFC manufacturers | -Telecom equipment manufacturers, etc. |

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What differentiates our conferences?

- The **agenda** is developed by our researchers, who track the sector round the year. It is thus **relevant** and **topical**. It is not driven by a particular organisation and does not have a particular slant.
- The **speakers** are **professionals** and **experts** involved in the sector, not a mix of ambassadors, ministers, celebrities and business owners.
- The conferences do not just comprise panels and speeches; they provide a good mix of **expert presentations** and **case histories**, and of course **panel discussions**.
- We have **representation** from **across the country**, as is the case at our physical conferences too.
- Each **stakeholder group** – **policymakers, developers, financiers, consultants** and **relevant NGOs** – is represented at our conferences.
- The moderators merely ask the questions. The **stars** are the **speakers** themselves.
- The **sessions begin and end on time**.
- There is adequate time for a **Q&A session** with **each speaker**. These are not “hit and run” speeches.
- The **delegates** are **professionals** who are vested in the sector, and are not just assembled through social media.
- The **participants** in each conference receive a **concise report outlining the key facts, trends and issues** in the sector.
- A **recap** of the conference is also made available to reinforce the key takeaways.

Delegate benefits (Virtual Conference)

- Direct interaction with senior speakers (Q&A facility)
- Easy connectivity to geographically dispersed delegates (click of a mouse)
- Concise report offered as a backgrounder
- Cost effective (lower ticket price as compared to a physical conference)
- Offers flexibility and convenience
- Access to conference recording
- Recap of conference sessions
- Contributes to sustainability and lower carbon footprint

Benefits of sponsorship (Virtual Conference)

- E-meet influencers and decision-makers
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- Increase brand recognition
- Target a captive and engaged audience
- Drive website traffic through social media promotions
- Position your company as the thought-leader in your industry

REGISTRATION FORM

- I would like to register for the “TELECOM INFRASTRUCTURE IN INDIA” conference (March 18-19, 2021)
- I would like to register for the “OFC NETWORKS IN INDIA” conference (April 15-16, 2021)
- I would like to register for **both the conferences**

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1 Login	12,000	2,160	14,160	200
2 - 3 Logins	20,000	3,600	23,600	350
4 - 5 Logins	28,000	5,040	33,040	500
6 - 9 Logins	36,000	6,480	42,480	650
10 - 20 Logins	42,000	7,560	49,560	800

- 30 per cent “Early Bird” discount for “Telecom Infrastructure in India” ends on February 25, 2021.
- 30 per cent “Early Bird” discount for “OFC Networks in India” ends on March 25, 2021.
- GST @18 per cent is applicable on the registration fee.
- Registration will be confirmed on receipt of the payment.

Payment Policy:

- Full payment must be received prior to the conference.
- Payments for “early bird” registrations should come in before the last date of discount. Discount offers cannot be combined with any other offer.
- Conference fees cannot be substituted for any other product or service being extended by India Infrastructure Publishing Pvt. Ltd.

Organisers

The conference is being organised by **India Infrastructure Publishing**, the leading provider of information on the infrastructure sectors through magazines, newsletters, reports and conferences. The company publishes *tele.net*, *Indian Infrastructure*, and *Renewable Watch* and *Smart Utilities* magazines. In addition, it publishes *Telecom News* (a weekly newsletter), and the *Telecom Directory and Yearbook*. The group also operates www.tele.net.in, India's most comprehensive telecom website.

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