

New Report

# Optic Fibre Cable Market in India 2019

Market Trends, Regulatory Landscape and  
Demand and Supply Outlook

❖ Report (PDF)

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India Infrastructure Research

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The exponential growth in data consumption and the ever-increasing demand for video content is leading to increasing optic fibre cable (OFC) deployments in India. The year 2018 saw significant fibre installations, both in the backhaul and in the last mile. Telcos have launched their fibre initiatives. Larger number of towers and small cells are getting fiberized to meet the 4G and 5G requirements. Fibre cables are also being laid for Wi-Fi and In-building connectivity (FTTx) solutions. Additionally, robust OFC networks are central to flagship government programmes such as BharatNet and Smart Cities, and will be an essential component of future networks. Going forward, the Fibre First initiative outlined in the National Digital Communications Policy, 2018 (NDCP) will give a major impetus to India's OFC market, and demand will be further bolstered as the industry gears up for 5G deployments. OFC demand is also being led by ISPs, cable TV operators, as well as by government utilities such as power transcos and Indian Railways, oil and gas companies, and power transmission and distribution firms which are enhancing their OFC reach.

With this backdrop, the report on Optic Fibre Cable Market in India 2019 will focus on the size of the OFC opportunity, key demand segments and growth drivers, current deployment status, policies and programmes at central and state levels, technology and cost trends, and the implementation experience of RoW regulations. There will be an equal emphasis on both the demand and supply side scenarios with profiles of key players across demand segments as well as key OFC manufacturers.

1. **Executive Summary**
2. **Market Size and Trends**
  - ❖ Size and Growth Trends
    - Annual Growth Trends
    - Key Player-wise Deployment Status
    - India Vs. Global
  - ❖ Key Demand Drivers
  - ❖ Emerging Policy and Regulatory Scenario
  - ❖ Key Issues and Challenges
  - ❖ Future Outlook
3. **Technology-Related Demand Drivers**
  - ❖ Backhaul Upgrades for High-Bandwidth Services
    - Tower Fiberisation for 4G/5G
    - Small Cells Fiberisation
  - ❖ Last Mile Connectivity
    - FTTx
    - Wi-Fi and IBS
  - ❖ Data Centres
4. **Market Demand Drivers**
  - ❖ Data Growth Trends and Projections
  - ❖ Entry of New Players (Jio Fibre, Google Fibre, etc.)
  - ❖ Content Development
5. **Government Programmes and Initiatives**
  - ❖ BharatNet Phase II and III
  - ❖ GramNet
  - ❖ NagarNet
  - ❖ Smart Cities
  - ❖ Network for Spectrum
  - ❖ Building Bye Laws
  - ❖ State-level Projects and Initiatives (This will cover projects such as Maharashtra MahaNet, AP FibreNet and Telangana T-Fiber, etc.)
6. **Demand Projections**
  - ❖ Addressable Potential Across Demand Segments
  - ❖ Projected Demand under Government Programmes (2020-25)
  - ❖ Projected Demand by The Key Player Segment (2020-25)
7. **Production Capacity Trends and Outlook**
  - ❖ Growth in Production Capacity
  - ❖ Emerging Solutions and Products
  - ❖ Focus on Make in India
  - ❖ Key Challenges
  - ❖ Future Outlook
8. **Cost and Technology Trends**
  - ❖ Technology Landscape (Single/Multi-Mode, Plastic Optic Fibre, Macrobend Fibre, etc.)
  - ❖ Deployment and installation Practices
  - ❖ Raw Material Trends (Availability, Imports, Cost, etc.)
  - ❖ Duties and Taxes
  - ❖ Future Outlook
9. **Likely Impact of NDPC 2018**
  - ❖ Policy Highlights and Provisions
    - Fibre First Initiative
    - National Digital Grid
  - ❖ Targets and Timelines
  - ❖ Implementation Status and Requirements
  - ❖ Impact on OFC Demand
10. **RoW Regulations: State-wise Charges and Implementation Status**
  - ❖ RoW Rules - Implementation Status
  - ❖ State Policies
  - ❖ Issues and Challenges
  - ❖ Key Recommendations
11. **Industry Structure and Key Operator Profiles**
  - ❖ Evolving Industry Structure
  - ❖ Emerging Business Models (OFC Sharing, Independent Fibrecos, JVs, Neutral Host Model)
  - ❖ Key Player Profiles (Each of the segments will cover profiles of key players detailing their OFC network size, FTTH and related services, key contracts and collaborations, future plans and requirements)
    - Operators (Bharat Airtel, Vodafone Idea, Reliance Jio, BSNL and MTNL)
    - Towercos (ATC India, Indus Towers, Bharti Infratel, Quippo Telecom Infrastructure, Ascend Telecom Infrastructure, Aster Infrastructure, Reliance Jio Infratel, Reliance Infratel, GTL and Tower Vision)
    - ISPs (TTSL, ACT, Hathway, You Broadband, Tikona Infinet, D-Vois Communications, Excitel Broadband, Alliance Broadband, Spectra, DEN, etc.)
    - Wi-Fi/IBS Providers (FireFly Networks, Ubico Networks, Intech Online, QuadGen Wireless, Microsense Networks, IBS Networks, etc)
    - Utilities (Power, Oil & Gas, and Railways)
    - Defence
    - Cable TV/ DTH Providers (Tata Sky, Dish TV, Sun Direct TV, Bharti Telemedia, Reliance Digital, Ortel, etc.)
12. **Key Supplier Profiles**

*(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)*

  - ❖ AFL
  - ❖ Aksh OptiFiber Limited
  - ❖ Birla Cable Limited
  - ❖ CommScope
  - ❖ Corning
  - ❖ Finolex Cables Limited
  - ❖ Himachal Futuristic Communications Ltd.
  - ❖ Paramount Communications Limited
  - ❖ Polycab
  - ❖ R&M (Reichle & De-Massari AG)
  - ❖ Sterlite Technologies Limited
  - ❖ UM Cables Limited
  - ❖ Uniflex Cables
  - ❖ Vindhya Telelinks Limited
  - ❖ West Coast Optilinks

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