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OPTIC FIBRE CABLE MARKET IN INDIA

GROWTH DRIVERS, OPPORTUNITIES AND OUTLOOK

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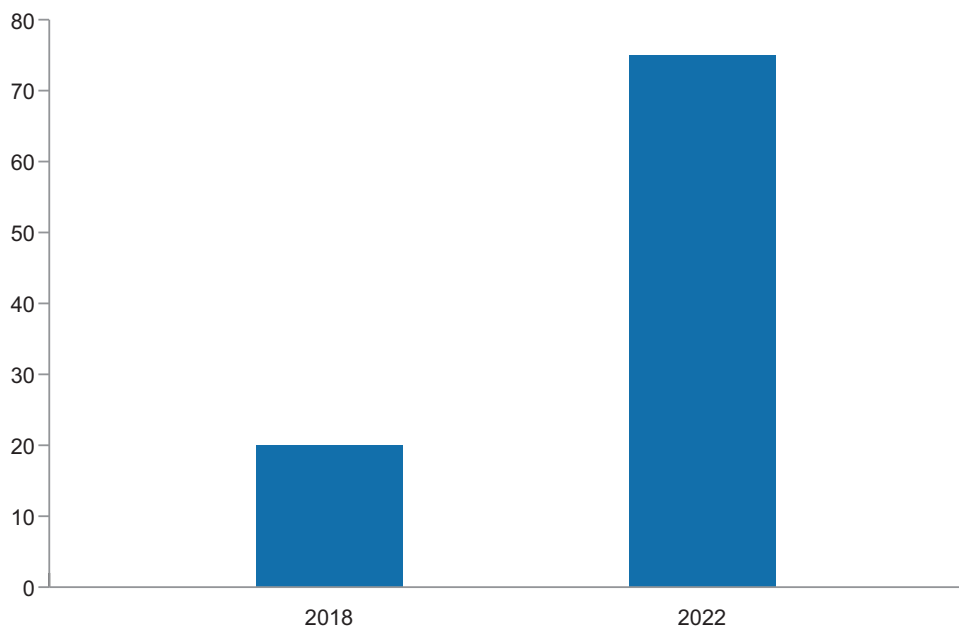
With high-speed internet connectivity and seamless data flow becoming a necessity, demand for optic fibre networks is set to spiral upwards. Three key factors that are and will be driving this demand are ever increasing data demand, government's growing digitalisation thrust and operators' preparing for 5G service launch.

Total data usage in India has increased from 4.2 million TB in June 2017 (431 million internet users) to 6.5 million TB in December 2017 (445 million internet users), implying an increase in data consumption per user from 1.2 GB to 1.9 GB during this period. The data market in India is currently being driven by 4G services adoption and uptake. From an end user perspective, 4G offers high speed data access, almost 10 times higher than 3G. However, only 20 per cent of sites in India are fiberised, a number that needs to go upto 80-85 per cent by 2022 to support 5G and its enabling technologies such as M2M, IoT, artificial intelligence, etc.

OFC growth in India is also being driven by the government's Digital India push through initiatives such as BharatNet and Smart Cities. BharatNet Phase I, which was completed in December 2017, alone involved the laying of over 250,000 km of OFC. Phase II, which is scheduled to be completed by March 2019, will see another 400,000 km of OFC being installed. The Smart Cities Mission will also generate significant opportunities for the industry as OFC is fundamental to enabling services such as Wi-Fi, video surveillance and security, smart lighting, smart parking and smart traffic management.

Going forward, the OFC demand will be led by a mix of telecom players, ISPs, cable TV operators and Bharat Broadband Network Limited, along with government utilities such as Indian Railways, oil and gas companies, and power transmission and distribution firms.

Projected Growth in Site Fiberisation for 5G



5G will also require a multi-fold increase in small cells deployment, with each small cell requiring backhaul on fibre.

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