

Uri-I Stage-II (240 MW), Dulhasti Stage-II (260 MW), Chenab Valley (Pakal Dul, Kiru, Kwar — 2,164 MW). BSNL is the only telecom provider cleared for sensitive border areas.

Action Points:

Key actions: (1) Defence CNPN for Northern Command and all border installations; (2) Private networks for remote hydropower construction sites; (3) Tourism digitization for post-Article 370 tourism boom; (4) Border village exclusive 4G.

TIER 2 — High-growth opportunity circles

Tamil Nadu (TN) — Priority: Defence Corridor + Auto/EV + Enterprise The 5-node Defence Industrial Corridor (Chennai, Coimbatore, Hosur, Salem, Tiruchirappalli) has ₹3,100 crore in pledged investments and 120+ aerospace companies. VinFast's \$500 million EV assembly plant creates Thoothukudi as Tamil Nadu's 4th auto hub. The Chennai-Kanyakumari Industrial Corridor covers 23 of 32 districts.

Action Points:

Key actions: Defence CNPN across 5 nodes; VinFast campus and EV corridor connectivity; FTTH acceleration in growing Coimbatore/Trichy IT parks.

Gujarat (GJ) — Priority: GIFT City + Dholera + Industrial Corridor GIFT City IFSC hosts 1,150+ registered entities including JP Morgan, Standard Chartered, Deutsche Bank — all requiring ultra-low-latency fiber. Dholera Smart City (920 sq km) is 95% activation-ready with Tata Electronics semiconductor fab coming.

Action Points:

Key actions: GIFT City carrier-neutral enterprise fiber; Dholera Smart City ICT infrastructure bid; DMIC corridor fiber backbone; Semiconductor fab CNPN.

Andhra Pradesh (AP) — Priority: Amaravati + IT Corridor + VCIC Amaravati capital construction (₹65,000 crore total, Phase-1 ₹38,000-40,000 crore) explicitly includes ICT infrastructure in tenders. Quantum Valley Tech Park launching 2026 with 11 IT projects. The Visakhapatnam-Chennai Industrial Corridor (VCIC) spans 800 km.

Action Points:

Key actions: Bid for Amaravati ICT backbone; Enterprise connectivity for Quantum Valley; FTTH for new Amaravati residential areas housing 3.5 million population (long-term).

Kerala (KL) — Priority: Vizhinjam Triangle + IT Parks + FMC Vizhinjam International Deepwater Port (operational) catalyzes a ₹3 lakh crore growth triangle. Infopark Phase III (300+ acres) is India's first AI-Native City. Kerala's Work-Near-Home program expanding to 200 centers needs fiber connectivity.

Action Points:

Key actions: Vizhinjam growth triangle industrial connectivity; Infopark Phase III ICT; Work-Near-Home backbone; FTTH bundles leveraging Kerala's high literacy/digital adoption.

Jharkhand (JH) — Priority: Coal Mining CNPN (BSNL's largest CNPN opportunity) Jharkhand holds 40% of India's mineral reserves with 217 coal mines (101 active) producing 259 MTPA. BSNL has the proven Amlohri template. Central Coalfields, Bharat Coking Coal, and Eastern Coalfields all operate here. Tata Steel Jamshedpur and SAIL plants need Industry 4.0 connectivity.

Action Points:

Key actions: Approach all Coal India subsidiaries with standardized CNPN package; Tata Steel/SAIL private network proposals; Mining belt 4G coverage.

Rajasthan (RAJ) — Priority: Data Centers + Solar CNPN + Defence New data center policy targets ₹20,000 crore investment and 300 MW capacity. The 2,450 MW Pugal Solar Park (₹17,000 crore) needs monitoring CNPN. Major defence installations at Jodhpur, Jaisalmer, and Pokhran.

Action Points:

Key actions: Data center connectivity for Jaipur DC parks; Solar park IoT/CNPN; Defence installation communications; Jaipur IT enterprise FTTH.

Haryana (HR) — Priority: Gurugram Enterprise (India's #3 IT hub) Gurugram hosts 250+ Fortune 500 companies with DLF Cyber City and 8 million sq ft of IT space. The new Global Artificial Intelligence Centre (GAIC) and 1,000-acre Global City on Dwarka Expressway add further demand.

Action Points:

Key actions: Competitive enterprise leased lines undercutting Jio/Airtel; Hisar defence hub CNPN; FTTH for Gurugram's booming residential corridors; GAIC data connectivity.

TIER 3 — Steady-growth and turnaround circles

Madhya Pradesh (MP) — Coal CNPN replication from Amlohri across Singrauli belt; Indore Super Corridor enterprise/FTTH for TCS/Infosys campuses; Pithampur industrial connectivity.

Chhattisgarh (CG) — SECL coal mine CNPN across dozens of mines; NTPC Korba/Sipat plant private networks; Bhilai Steel Plant Industry 4.0 connectivity.

West Bengal (WB) — Kolkata IT hubs (Salt Lake, New Town, Bengal Silicon Valley ₹1 trillion hub) enterprise; CtrlS data center connectivity (60 MW full buildout); Haldia industrial enterprise.

Odisha (OD) — Mining/steel CNPN (Tata Steel, JSPL, Vedanta); Paradip Smart Industrial Port City (₹3,544 crore); 8 new digital hubs in tier-2 cities.

Punjab (PB) — Ludhiana MSME enterprise connectivity; Mohali IT corridor FTTH; Agritech IoT; Chandigarh enterprise.

Bihar (BR) — Rural connectivity dominance (94.65M wireless subscribers with massive rural gap); Railway backhaul for 57 projects worth ₹86,458 crore; AKIC Gaya industrial cluster.

TIER 4 — Niche/strategic circles

Himachal Pradesh (HP) — Hydro CNPN for remote power stations; tourism WiFi/FTTH (Shimla, Manali, Dharamshala); border area defence.

Goa — Startup/IT park connectivity; tourism digitization; NRI/remote worker FTTH.

Andaman & Nicobar / Lakshadweep — Strategic defence connectivity; satellite-terrestrial integration (BSNL increased A&N bandwidth from 2 to 4 Gbps); tourism broadband.