

No: BSNLCO-RSTG/12(11)/2/2026-RSTG

Dated: 03.04.2026

To,

All CGMs BSNL.

Subject: Circle-by-circle strategic priorities - 90 day Action PLAN-Regarding.

I am directed to convey that a comprehensive circle wise 90 day action plan has been developed based on detailed economic intelligence and an assessment of BSNL's competitive position across all telecom circles.

To ensure focused execution and optimal resource allocation, all circles have been categorized into four distinct Tiers, based on revenue potential, market opportunity, and strategic importance. Further details regarding Tier-1, Tier 2, Tier 3, and Tier 4 circles, along with specific circle-wise targets, key performance indicators, and actionable directives are hereby enclosed as Annexure 1

All Circle Heads are advised to:

- Align their operational strategies with the forthcoming Tier-based framework
- Prioritize initiatives based on their assigned Tier classification
- Ensure strict adherence to timelines and performance benchmarks
- Update daily progress in the google sheet; through the war room
- Submit weekly progress reports for review and course correction

This initiative is aimed at strengthening BSNL's market position, improving operational efficiency, and driving sustainable revenue growth across all circles.

This issued with the approval of the Competent Authority.


03/4/26
(Santosh Dahiya)
DGM (Restg.)

Copy to:

1. PPS to the CMD BSNL
2. PPS to All The Directors of BSNL Board, New Delhi
3. The CVO, BSNL New Delhi
4. PGM (Pers.) for necessary action in ERP.
5. All units Head, BSNL CO
6. CLO (SCTY AGM (VO CO), BSNL C.O.
7. DM (OL) for Hindi version.
8. Intranet Portal/ Order Bundle/Spare Copy

Circle-by-circle strategic priorities – 90 day Action PLAN

The following state-by-state action plan is made with economic intelligence with BSNL's competitive position in each circle. Circles are grouped into four tiers based on revenue opportunity and strategic importance.

TIER 1 — Strategic command circles (highest investment priority)

Telangana (TS) — Priority: CNPN + Enterprise + Data Center Connectivity
Hyderabad's data center market is exploding: 859 MW capacity in 2025, projected 2,960 MW by 2031. AWS committed ₹60,000 crore; Microsoft ₹16,000 crore for 6 data centers; CtrlS is tripling capacity. The 19,000-acre Pharma City at Mucherla — the world's largest integrated pharma hub with 150 companies (Dr. Reddy's, Aurobindo, Hetero) — needs private 5G for manufacturing automation.

Action Points:

BSNL **should** offer carrier-neutral dark fiber paths between the Shamshabad, HITEC City, and Gachibowli data center clusters.

Key actions in 90 days: (1) Dark fiber to all 61+ Hyderabad-area data centers; (2) Pharma City CNPN proposal; (3) Enterprise SD-WAN for 40%+ of India's GCCs headquartered in Hyderabad.

Maharashtra (MH) — Priority: NMIA Ecosystem + Data Centers + MIHAN Navi Mumbai International Airport opened December 2025 with 20 million passenger Phase 1 capacity. FedEx broke ground on a ₹2,500 crore automated cargo hub. Mumbai accounts for 60% of India's data center expansion with ₹45,000 crore in projected investments. MIHAN Nagpur (40.25 sq km SEZ) now houses 30,000+ employees with Dassault/Reliance aerospace assembly.

Action Points:

Key actions: (1) Enterprise fiber for NMIA aerocity and surrounding Ulwe-Panvel development zone; (2) Inter-data-center dark fiber across MIDC corridors; (3) MIHAN Nagpur CNPN for defence/aerospace manufacturing; (4) Massive FTTH deployment in booming Navi Mumbai residential corridors.

Karnataka (KA) — Priority: Enterprise + Smart City + FTTH Bangalore hosts 16,000+ startups, 32 unicorns, and over 40% of India's GCCs. The ₹20,000 crore Bidadi AI Smart City — India's first AI-powered greenfield city on 2,000+ acres — requires complete ICT infrastructure. Karnataka's aerospace/defence policy targets ₹60,000 crore in investments. The "Beyond Bengaluru" initiative

is pushing IT growth to Mysuru, Hubballi-Dharwad, and Mangaluru — tier-2 markets where BSNL has existing infrastructure advantage.

Action Points:

Key actions: (1) Bid for Bidadi AI Smart City ICT infrastructure; (2) Enterprise connectivity for Bangalore GCC corridor at competitive rates; (3) Defence corridor CNPN for Belagavi; (4) Aggressive FTTH in Mysuru, Hubballi-Dharwad.

Uttar Pradesh East + West (UP-E, UP-W) — Priority: Defence CNPN + Jewar Ecosystem + Rural The UP Defence Industrial Corridor has attracted ₹38,176 crore in investment proposals across 6 nodes (Lucknow, Kanpur, Agra, Aligarh, Chitrakoot, Jhansi), with Adani Defence, BrahMos Aerospace, and 200+ MoUs. Noida International Airport (Jewar) inaugurated March 2026 with ₹19,877 crore in surrounding data center and logistics commitments. UP is India's most populous state with 80 million+ PM-KISAN beneficiaries needing digital payment connectivity.

Action Points:

Key actions: (1) CNPN for all 6 defence corridor nodes; (2) Enterprise fiber for Jewar aerotropolis; (3) Noida IT corridor enterprise connectivity; (4) Rural 4G saturation as foundation for rural digital payments.

Northeast (NE Circles) — Priority: Defence + Border Connectivity + CNPN The Northeast represents BSNL's most unassailable strategic market. PM Modi inaugurated ₹47,600 crore in NE infrastructure projects in early 2026 alone. BSNL is the ONLY operator with clearance for military installations across all 8 states. The ₹18,600 crore Brahmaputra Tunnel (Gohpur-Numaligarh) has dual military-civilian use. BSNL already signed the landmark NRL Numaligarh refinery CNPN MoU and shifted all NE connectivity from Bangladeshi to Indian fiber backbone.

Action Points:

Key actions: (1) Defence/NFS connectivity across all military installations; (2) Replicate NRL CNPN to Oil India, ONGC, NHPC operations; (3) Border village 4G for 337+ uncovered Arunachal villages; (4) Telecom backbone along ₹47,600 crore infrastructure corridors.

Jammu & Kashmir (JK) — Priority: Defence + Hydro CNPN Massive military presence (Northern Command HQ at Udhampur) plus 18,000 MW hydropower potential (only 3,540 MW harnessed). New hydro projects signed March 2026:

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.