

OPPORTUNITIES IN INDIAN DEFENCE MARKET 2019

Market Analysis, Potential for Offsets and Future Outlook

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Executive Summary

India's defence industry has been growing at a modest pace for the past few years. Modernisation of the armed forces and indigenisation of manufacturing are the key focus areas. The segment is receiving the much needed push under the Make in India programme. The concept of import substitution is being gradually accepted by stakeholders. This is an opportune time to embark upon a new phase of self-reliance in the sector by manufacturing technologically advanced equipment within India. Private sector participation is gradually picking up. The objective of the Indian defence offset guidelines is to encourage foreign vendors to engage in complete transfer of technology arrangements with Indian offset partners. That said, the government is set to announce radical changes in the guidelines to bring in investments in the defence and aerospace segments. Going forward, the government plans to substantially step up investments in modernisation of the armed forces and creation of infrastructure especially in the aerospace and electronics segments. In this regard, the new Defence Procurement Procedure is expected to facilitate better contract negotiations and improve the pace of contract awards.

SECTION I: RECENT TRENDS, DEVELOPMENTS AND OUTLOOK

1. Sector Overview

- ❖ Existing Infrastructure Gaps
- ❖ Key Agencies and Industry Structure
- ❖ Growth Drivers
- ❖ R&D Landscape
- ❖ Trends in FDI
- ❖ Trends in Exports and Imports
- ❖ Trends in Budgetary Allocations
- ❖ Recent Developments (New product launches, Indegenisation Initiatives, MoUs & JVs, Contract Awards/Acquisitions)
- ❖ Issues and Challenges
- ❖ Sector Outlook

2. DPP 2016 and Strategic Partnership Model

- ❖ DPP 2016
 - Key Features
 - Recent Amendments
 - Impact on Procurement under Buy Indian (IDDM) and Make Indian Categories
- ❖ Strategic Partnership Model
 - Key Features
 - Potential Benefits

- Role of Strategic Partners as System Integrators
- Role of OEMs

- ❖ Next Steps Towards the New Defence Procurement Procedure
- ❖ Defence Manufacturing Policies at the State-level (Odisha, Uttar Pradesh, Haryana, etc.)
- ❖ Unresolved Issues and Concerns

3. Defence Manufacturing Landscape

- ❖ Current Scenario
- ❖ Focus on Modernisation
- ❖ Current and Potential Role of MSMEs
- ❖ Past and Future Acquisitions
- ❖ Upcoming Projects
- ❖ Market Opportunities
- ❖ Future Outlook

4. Potential for Private Sector Participation

- ❖ Experience So Far
- ❖ Impact of Strategic Partnership Policy
- ❖ Key Completed Projects
- ❖ Key Players
- ❖ New JVs and Partnerships
- ❖ Tax Environment
- ❖ Emerging Areas of Private Participation
- ❖ Upcoming Opportunities
- ❖ Issues and Challenges
- ❖ Outlook and The Way Forward

5. Sector Outlook and Market Opportunities

- ❖ Investment Requirements
- ❖ Budget Projections
- ❖ Acquisition Plans of Armed Forces
- ❖ Opportunities in Future Acquisitions/Programmes
- ❖ Infrastructure Development (Manufacturing Clusters and Parks)
- ❖ Capital Acquisition in Defence Procurement
 - Buy (Indian, IDDM, Global)
 - Buy and Make
 - Make (Make I and Make II)
- ❖ Segment-wise Opportunities
 - Defence Vehicles
 - Arms and Ammunitions
 - Aerospace

- Electronics
- Shipbuilding
- Defence Equipment
- Others

SECTION II: DEFENCE OFFSETS: PROGRESS AND OPPORTUNITIES

6. Defence Offsets Market

- ❖ Evolution of Indian Defence Offset Industry
- ❖ Indian Offset Guidelines: Impact and Gaps
- ❖ Discharged Offset Obligations
- ❖ Ongoing Offset Contracts
- ❖ Performance of Key Offset Contracts
- ❖ Incentives and Penalties
- ❖ Issues and Challenges

7. Future Potential and Outlook

- ❖ Upcoming Contracts and Orders
- ❖ International Best Practices
- ❖ Expectations from the New Offset Guidelines
- ❖ Outlook and Opportunities
- ❖ Next Steps for IOPs

SECTION III: SEGMENT ANALYSIS AND OUTLOOK

8. Key Segments

- ❖ Aerospace
- ❖ Armoured and Defence Logistics Vehicles
- ❖ Arms and Ammunition
- ❖ Electronics and Communication Systems
- ❖ Shipbuilding

Each of the segments will include the following:

- Market Size and Growth
- Trends in Expenditure
- Key Contracts Awarded
- Industry Structure and Key Players
- Role of DRDO and OFB
- Collaborations and Tie-ups
- Impact of Make in India on Indegenisation
- Modernisation Plans and New Product Launches
- Upcoming Contracts
- Segment Outlook

SECTION IV: KEY PLAYERS

9. Profiles of Defence Public Sector Undertakings (DPSUs)

- ❖ Bharat Dynamics Limited
- ❖ Bharat Electronics Limited
- ❖ Bharat Earth Movers Limited
- ❖ Garden Reach Shipbuilders and Engineers Limited
- ❖ Goa Shipyard Limited
- ❖ Hindustan Aeronautics Limited
- ❖ Hindustan Shipyard Limited
- ❖ Mazagon Dock Shipbuilders Limited
- ❖ Mishra Dhatu Nigam Limited

Each profile will give an overview of the DPSU's operations, financial performance, indirect imports and vendor development, share in defence procurement, capex plans, indigenisation targets, modernisation initiatives, key collaborations, R&D initiatives, and future plans and strategies.

10. Profiles of Private Players

- ❖ Airbus Group India
- ❖ Ashok Leyland Defence Systems
- ❖ Bharat Forge Limited
- ❖ BAE Systems India
- ❖ Boeing India
- ❖ Larsen & Toubro (L&T)
- ❖ Dassault Aviation
- ❖ Tata Group
- ❖ Reliance Defence Limited
- ❖ Punj Lloyd Industries Limited
- ❖ Mahindra Defence Systems
- ❖ Others (Domestic and Foreign)

Each profile will give an overview of the company's operations, key contracts, recent collaborations, joint ventures, and future plans and strategies.

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