

TABLE OF CONTENTS

<u>Executive Summary</u>	<u>Page number</u>
Background	1
Definition of Capital Goods	2
Objectives of the Study	3
Approach & Methodology	3
Synopsis & Findings of the report	4
Survey Results	5
Sectoral Findings	16
Recommendations for the Government	19
Indian Capital Goods Industry	25
Origins	25
The Policy Environment	25
Current Status	28
Operational Efficiencies	29
Exports	34
Existing Concerns	35
Potential and Growth Prospects	43
CII Survey	43
Heavy Electrical Equipment	45
Background and Historical Trends	45
Current Status in India	48
Structure of the Sector	55
Technology	56
Design & Engineering	60
Research & Development	61
Management Efficiencies	62
Operational Efficiencies	66
User Sector Feedback	72
Market Situation and Demand	73
Roadmap	81
Annexure-I : Benchmarking for Heavy Electrical Sector	86
Annexure-II : Exports for Electrical Machinery Sector	87
Annexure-III : Electrical Machinery Sector Projects	106
Indian Mining & Construction Equipment Industry	115
Background and Historical Trends	115
Current Status in India	116
Structure of the Sector	118
Technology	119
Design & Engineering	121
Research & Development	121
Management Efficiencies	121
Operational Efficiencies	125

User Sector Feedback	129
Market Situation and Demand	130
Roadmap	141
Annexure-IV : Benchmarking for Indian Mining & Construction Equipment Industry	146
Annexure-V : Exports for Construction & Mining Equipment	147
Annexure-VI: Indian Mining & Construction Projects	152
Indian Machine Tools Industry	163
Background and Historical Trends	163
Current Status in India	167
Structure of the Sector	171
Technology	172
Design & Engineering	176
Research & Development	177
Management Efficiencies	177
Operational Efficiencies	182
User Sector Feedback	187
Market Situation and Demand	189
Roadmap	194
Annexure-VII : Benchmarking for Indian Machine Tools Industry	205
Annexure-VIII: Exports for Machine Tools Sector	206
Process Plant Equipment	225
Background and Historical Trends	225
Current Status in India	227
Structure of the Sector	231
Technology	233
Design & Engineering	234
Research & Development	236
Management Efficiencies	236
Operational Efficiencies	240
User Sector Feedback	245
Market Situation and Demand	246
Roadmap	253
Annexure-IX : Exports for Process Plant Equipment	258
Annexure-X : Process Plant Equipment Projects	289
Sources and References used for the report	295