



IEEMA is privileged to present following reports:

- A. "Electrical Equipment Industry Report - 2011" on the status of the electrical equipment manufacturing industry in India.
- B. "Handbook on Trade Agreements" - study on the impact of signed trade agreements of India on the domestic Electrical Equipment Industry.

Electrical Equipment Industry Report - 2011

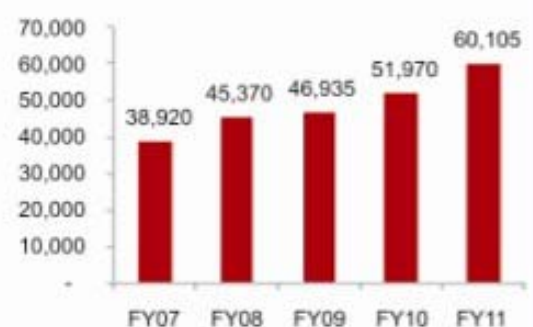
This 100 page report provides a wealth of information on the achievements of the Indian electrical equipment industry and the challenges the industry faces.

The size of the major T&D equipment manufacturing industry in FY 2010-11 has been estimated at Rs. 60,105 Cr and the industry experienced a growth of 11.25% and 13.66% in FY 2009-10 & FY 2010-11 respectively. The demand recovery was experienced in all product categories. Increased demand from power generation units boosted the growth in the T&D equipment.

The report is a must-have for all stakeholders of the electrical industry i.e. the equipment manufacturers, developers/ utilities in the power sector, raw material suppliers, contractors, foreign/ domestic investors, research houses and consultants etc. who are interested in Indian electrical equipment industry, and the policy makers in the government (Ministry of Power, Ministry of Heavy Industries, Ministry of Commerce & Industry, Ministry of Finance) etc.

Size of domestic major T&D equipment industry

(Rs. Cr)



Source: IEEMA

The report covers the performance of the manufacturing industry under following chapters:

Chapter 1: Introduction.

Chapter 2: (Power Sector Review): Covers the status of the Indian power sector, the evolution of the planning and implementation framework, the power sector development plans etc. It provides a review of the government programmes for power sector, the renovation and modernisation programmes for thermal and hydro projects and takes a look at the electrical equipment testing facilities in the country.

Chapter 3: (Power Generation Equipment): The 12th five year plan (year 2012-17) aims to add between 75,000 MW to 100,000 MW of generation capacity, making it critical for the domestic BTG manufacturing industry to be ready with necessary capacities and technology know-how. Chapter profiles the BTG industry, the joint ventures (JV) formed, the import-export scenario and the investment opportunities.

Chapter 4: (Power Transmission and Distribution Equipment Industry): Covers the performance of the T&D equipment manufacturing industry with separate sections on the major product groups viz. transformers, cables, controlgear and switchgears, energy meters, capacitors, and insulators. The growth in the industry size/ production levels, technology trends, export-import situation and concerns of the manufacturing industry have been covered separately for each of these product groups under respective product sections. Apart from these, qualifying requirements of few utilities corresponding to each product group are also studied.

Chapter 5: (Industry Concerns): Issues being faced across T&D product groups like non-availability of testing facilities in the country, fluctuation of raw material prices, lack of price preference clauses in domestic procurements and certain taxation related aspects have been detailed out.

Chapter 6: (HR Concerns): On-going capacity additions in the power sector will entail large-scale skilled manpower requirement in coming years. The key HR concern, pertaining to the electrical equipment manufacturing industry, is the availability of employable fresh engineers and the skill levels of the existing workforce.

Chapter 7: (Free Trade Agreements): Chapter details out various FTA entered into by the Government of India and opportunities and threats arising out of these for the Indian electrical manufacturing industry,

Chapter 8: (Interventions required): Most urgent and important of the various interventions required for India's emergence as a major global manufacturing hub for electrical equipment are covered under this Chapter. Key required "Interventions" are listed below:

Stakeholder	Issue
Ministry of Power, CPRI	The domestic electrical equipment manufacturing industry is facing an acute constraint of adequate testing facilities in the country. Limited and aged testing facilities result in supply delays and unnecessary escalation in equipment costs.
Ministry of Power, CEA, Utilities	Lack of uniformity in prequalification criteria across different qualifying parameters leads to reduction in competition and thereby higher cost of equipment. Variation in technical specifications adopted by different buyers make it difficult to implement and also impacts the equipment cost.
Ministry of Power, Governments Utilities	The domestic industry is at a disadvantage due to existing high level of tax structures, cost of capital, cost of raw materials, inadequacy of available infrastructure, etc. in comparison to foreign suppliers. Other BRIC Countries (i.e. Brazil, Russia and China) have put in place, policies which provide benefits to their domestic suppliers over imports in securing orders for large projects.
Ministry of Finance	In certain products the rate of customs duty on finished products is still less than the customs duty on raw materials / components, which creates serious inconsistencies and is discouraging to domestic manufactures
Ministry of Steel	Ministry of Steel has issued an order making BIS marking mandatory for CRGO/CRNGO steel along with other steel products. CRGO/CRNGO steel being imported item, this will create shortage of CRGO/CRNGO steel in India.

Handbook on Trade Agreements

Handbook on Trade Agreements is a study on the impact of signed trade agreements of India on the domestic Electrical Equipment Industry. The Handbook is a must-have for all stakeholders of Indian electrical industry.

A trade agreement between two or more countries, in general, focuses on expanding trade between the partner countries through tariff reductions, removal of non-tariff barriers, investment opportunities, trade in services etc. However, a larger industrial perspective about the trade agreements are increased competition, reduced profitability and take away of the market share of the domestic industry.

The Government of India has signed a number of Trade Agreements with other countries, comprising of Free Trade Agreements, Preferential Trade Agreements, Regional Trade Agreements, Bilateral Trade Agreements, Multilateral Trade Agreements, Comprehensive Economic Partnership Agreements, Comprehensive Economic Cooperation Agreements and a number of other Framework Agreements. These trade agreements provide an enhanced market access to Indian exporters in these countries as well as give a preferential access to manufacturers of these countries in the Indian market. Therefore, the trade agreements, on one hand, provide an opportunity to Indian manufacturers to increase their trade with other countries, and on other hand, pose a threat to them.

In view of the above, IEEMA felt a need for a comprehensive study to assess the impact of the trade agreements signed by the Government of India. The study was assigned to TPM, Solicitors & Consultants, New Delhi. The impact was examined both in terms of imports (to assess the threat to Indian industry) and exports (to assess the opportunities to Indian exporters), covering the period 2002-03 to 2010-11. The study was extended to all the finished products of Indian electrical industry, their raw materials and intermediates in the following two phases:

- Import and export analysis based on data starting FY 2002-03 till FY 2010-11
- Analysis of 15 signed trade agreements based on data starting FY 2002-03 till FY 2010-11

Some key findings of the study are:

(1) Finished goods showing continuous increase in imports volume during the period 2007-08 to 2010-11:

HS Code	Description	HS Code	Description
8547	Insulating Fittings For Electrical Machines...	8536	Electrical Apparatus For Switching...
8537	Boards, Panels, Consoles...	9030	Oscilloscopes, Spectrum Analysers...
8471	Automatic Data Processing Machines...	8535	Electrical Apparatus For Switching...
8501	Electric Motors And Generators (Excluding Generating Sets)	8546	Electrical Insulators Of Any Material
8502	Electric Generating Sets And Rotary Converters	8411	Turbo- Jets, Turbo- Propellers And Other Gas Turbines
8504	Electrical Transformers, Static Converters...	9032	Automatic Regulating Or Controlling Instruments And Apparatus
8532	Electrical Capacitors, Fixed, Variable Or Adjustable (Pre-Set)	8412	Other Engines And Motors
8539	Electric Filament Or Discharge Lamps...	9028	Gas, Liquid Or Electricity Supply Or Production Meters...

(2) Raw materials showing continuous decrease in import price during the period 2007-08 to 2010-11:

HS Code	Description	HS Code	Description
2508	Other Clays...	7404	Copper Waste And Scrap
3208	Paints And Varnishes...	7407/08	Copper Bars, Rods And Profiles; Copper Wire
3901	Primary Forms Polymers Of Ethylene...	7413	Stranded Wire, Cables, Plated Bands...
3904	Polymers Of Vinyl Chloride...	7602	Aluminium Waste And Scrap
4810	Newsprint, In Rolls Or Sheets	7604	Aluminium Bars, Rods And Profiles
4823	Other Paper, Paperboard...	7605	Aluminium Wire
6814	Worked Mica And Articles Of Mica...	7607	Aluminium Foil...
7011	Glass Envelopes (Including Bulbs And Tubes)...	8505	Electro-Magnets; Permanent Magnets...
7226	Flat-Rolled Products Of Other Alloy Steel...	8533	Electrical Resistors...
7403	Refined Copper And Copper Alloys...	8541	Diodes, Transistors...

The study also provides trade agreement-wise analysis of increase in volume of imports and exports as well as decrease in price of import products.

Reports	Price for IEEMA Members	Price for Non-IEEMA Members	Combined Price for IEEMA Members	Combined Price for non-IEEMA Members
Electrical Equipment Industry Report-2011	₹ 10,000/-	₹ 20,000/-	₹ 12,500/-	₹ 25,000/-
Handbook on Trade Agreements	₹ 5,000/-	₹ 10,000/-		

To book your copy, please send a requisition by email (sudeep.sarkar@ieema.org) or by fax (011-23733015) to IEEMA, New Delhi.



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