Infrastructure Insight: India

Description: The report provides a detailed look into the infrastructure sector in India, including analysis of the state of the current infrastructure, the regulatory and financing landscapes and the major projects in the construction pipeline.

The report covers all key infrastructure sectors: roads, railways, electricity and power, water and sewerage, communication, and airports and ports.

Summary:

India is currently planning to expand its infrastructure spending as set out by the budgets under the government of Narendra Modi. The total value of the infrastructure construction market reached INR11.7 trillion (USD179 billion) in 2015, according to the Infrastructure Intelligence Centre (IIC), up from INR6.9 trillion (USD106 trillion) in 2010. This value is projected to rise to INR18.9 trillion (USD290 billion) by 2020, in nominal value terms. This growth in spending is based on the assumption that a number of projects continue as planned large-scale programs, such as the Nuclear Power Program, which involves the construction of 16 nuclear power reactors in India, and the National Highways Development Program.

Scope:

- A concise analysis of the administrative, economic and political context for infrastructure in India.
- An in-depth assessment of the current state of infrastructure in India, including roads, railways, electricity and power, water and sewerage, communications, airports and ports.
- A focus on main political and financial institutions involved in the infrastructure market, as well as the competitive and regulatory environment.
- For each infrastructure sector, an explanation of the key drivers of growth in new investment and an analysis of the project pipeline, with a detailed look at the prospects for major projects and the companies that have secured contracts.

Reasons To Buy:

- Assess the current state of India's infrastructure, and the main drivers of investment, including the key institutions and financing methods.
- Investigate forecasts and gain an understanding of key trends in each of the main infrastructure sectors.
- Analyze the main project participants operating in each sector, to better understand the competitive environment.
- Identify top projects by sector, development stage and start date, to inform your expansion strategy.

Key Highlights:

- 958 large-scale infrastructure construction projects in India are currently being tracked, at all stages of development from announced to execution. These projects have a total investment value of INR116 trillion (USD1.8 trillion).
- The electricity and power sector accounts for the largest share of the project pipeline, with a total project value of INR52 trillion. This is followed by roads, with a pipeline value of INR26.8 trillion.
- When its current infrastructure is compared to the other BRIC economies (Brazil, Russia, India and China) through the World Economic Forum's Global Competitiveness Report, India trails China and Russia for overall quality.
- The 2015-16 budget has a key focus on unblocking the infrastructure pipeline through previously underutilized measures. One important initiative is the reallocation of tax revenue between central and state governments, increasing the states’ allocation by around 10%, thus empowering them to better allocate investment to need.

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