

रक्षा मंत्रालय  
MINISTRY OF  
DEFENCE



रक्षा उत्पादन विभाग  
DEPARTMENT OF  
DEFENCE PRODUCTION



India : The Emerging Defence Manufacturing Hub

**DEFEXPO 20**

INDIA

05-08 FEBRUARY 2020 LUCKNOW

Ministry of Defence





“ DefExpo 2020 is organised by the Ministry of Defence, Department of Defence Production. This premier exhibition will provide a unique opportunity to interact across the entire spectrum of Defence Industries including Defence product exhibitors, manufacturers, users, decision makers and visitors. Come and experience 'Make In India', and see the present and future of the Defence ecosystem with our special theme of the exhibition - 'Digital transformation of Defence'. ”

**Shri Rajnath Singh**  
Defence Minister of India



“ DefExpo 2020 is a mega Defence Exhibition, which provides a global platform for a large congregation of Indian and Foreign Defence companies to showcase their Defence related products and latest technologies. We welcome you to the prestigious 11<sup>th</sup> edition of DefExpo 2020 from 5<sup>th</sup>-8<sup>th</sup> February, 2020 at Lucknow. ”

**Shri Shripad Yesso Naik**  
Minister of State for Defence of India

“ DefExpo will provide the opportunity to professionals and the industry to find new meeting grounds for developing military industrial enterprises. ”

**Shri Narendra Modi**  
Prime Minister of India



# DEFEXPO 2020

DefExpo 2018—the 10<sup>th</sup> edition of the biennial mega defence exhibition—pitched India as the ‘Emerging Defence Manufacturing Hub’. The previous edition was the stage for over 50 bilateral G2G meetings, the signing of 40 MoUs, and witnessed participation from over 700 exhibitors. This edition, focusing on ‘Digital Transformation’, is poised to see larger participation of defence manufacturers from both the public and private sectors, OEMs and MSMEs. The event provides an ideal platform for businesses, decision makers and policymakers to interact, to address common concerns and to not only establish India as a defence manufacturing hub but to bolster the global ecosystem.

DefExpo 2020 is sure to bring the leading technologies in the defence sector under one roof and provide a myriad of opportunities for governments, private manufacturers, startups and the entire space. The event is scheduled to be held from 5<sup>th</sup>-8<sup>th</sup> February 2020 in Lucknow and will cover the complete spectrum of the country’s aerospace, defence and security interests. If you have long term goals in India, this edition of the show will be an invaluable source of ground level intelligence and insight that you are not going to pick up from a distance.

## KEY FIGURES FROM DEFEXPO 2018

702  
exhibitors

492 applications  
received for Open  
Challenge for  
Startups

284 foreign/  
official delegates  
  
160 international  
exhibitors

>350K visitors  
over 3 days



# DIGITAL TRANSFORMATION OF DEFENCE

5<sup>th</sup>-8<sup>th</sup> February 2020

There's a revolution unfolding in the world today. We are witnessing the emergence of disruptive technologies that are at the cusp of overtaking existing military concepts and require us to rethink our battlefield strategies. The secure and timely flow of data and intelligence have become the lifeline of modern militaries. The theatres of war are rapidly changing to encompass cyber and space landscapes. Artificial intelligence, autonomous systems, ubiquitous sensors, additive manufacturing, and quantum science are but a few arenas that are at the forefront of digital transformation in military affairs.

India, with its strength in information technology and software development, stands poised to bolster the digital transformation trend and to collaborate with world leaders in cutting edge military technology.

## India and Digital Transformation:

**USD 50 Bn –**

Indian outsourcing opportunity for Defence IT & Engineering services by 2020

Indian exports of Telecom instruments (civil and defence) amounted to **USD 1.2 Bn** (2018)

Software exports from India amounted to **USD 109.6 Bn** (2017-18)

**USD 181-231 Mn**

in cyber export revenues (2018)



# DEFENCE SECTOR OVERVIEW

## Quick Facts



**2<sup>nd</sup>**  
largest armed force  
in the world (1.3 Mn  
active personnel)



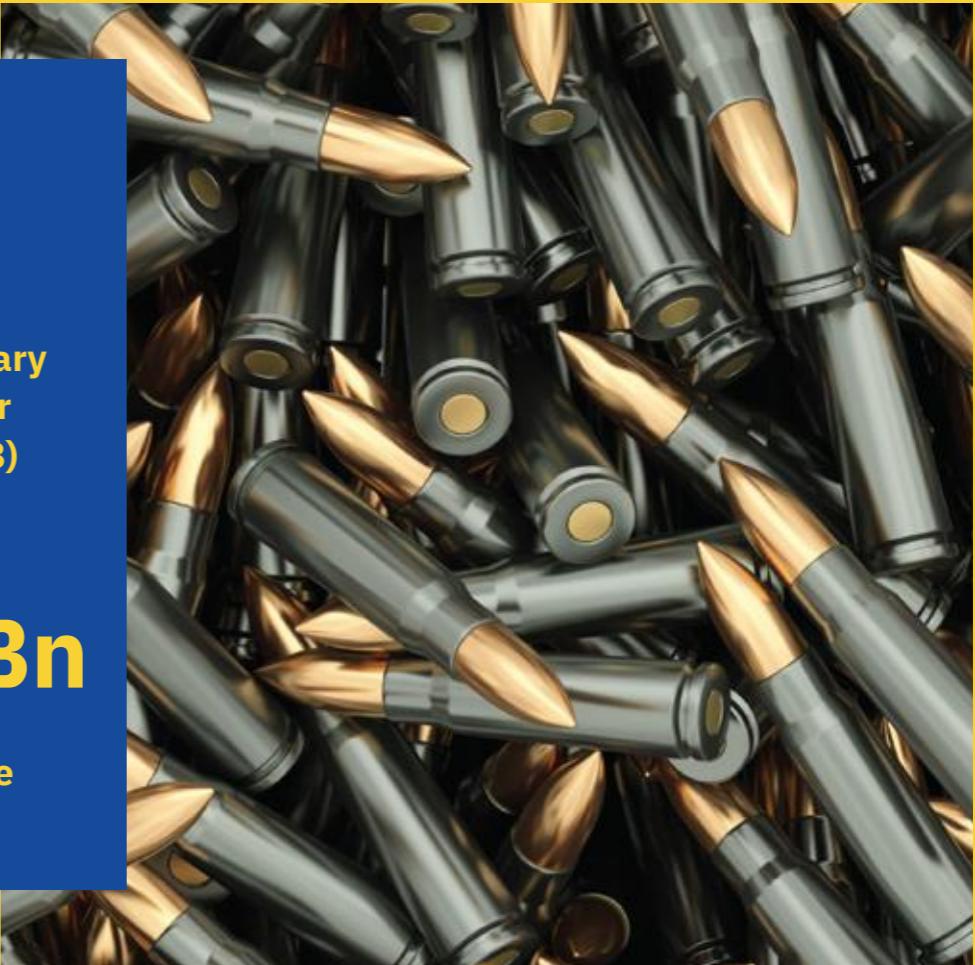
**5<sup>th</sup>**  
largest defence  
budget in  
the world  
(USD 42.2 Bn)  
  
India contributes  
**3.7%**  
to the global  
military expenditure

**USD  
1.4 Bn**

worth of exports  
(2018-2019); military  
exports to 18 major  
countries (2017-18)

**USD  
14.56 Bn**

allocated for  
capital expenditure  
(2019-20)



Overall defence  
production in India  
has increased from

**USD 6.4Bn**  
in 2013-2014 to

**USD 11.4Bn**  
in 2018-2019



## DEFENCE BUDGET ALLOCATION

Army

**55%**

Airforce

**23%**

Navy

**15%**

DRDO

**6%**

OFB

**1%**

# DEMAND DRIVERS

Key opportunities

# 1

## Field Artillery Rationalization Plan

1,580 towed artillery guns, 814 Mounted Gun System, 100 tracked Artillery guns

# 2

## Multi-Role Fighter Aircraft Acquisition

Requirement of 110 aircraft under Make in India initiative

# 4

## Infantry Modernization

7.5 L Assault Rifles, 3.65 L Close quarter battle carbine and 40,000 nos. of light machine gun required. Future Infantry Soldier as a System (F-INSAS)



to transform the Indian soldier into a 'next-gen self-contained fighting machine'

# 5

## Future Infantry Combat Vehicle (FICV) Program

Indigenous design & development of 2,600 infantry combat vehicles to transport mechanized infantry for the Indian Army



# POLICY SUPPORT & INCENTIVES

**FDI POLICY**    **49% 100%**

Automatic Route

Government Route

## Strategic Partnership Policy

Establishment of long-term strategic partnerships between the Indian private sector and global Original Equipment Manufacturers (OEMs), through a transparent and competitive process to seek technology transfers to set up domestic manufacturing infrastructure and supply chains

## Industrial License

Reduced entry barriers for new entrants as new liberalized regime has removed majority components/parts/sub-systems that require IL for defence manufacturing

## Innovations for Defence Excellence (iDEX)

Setting up of Defence Innovation Hubs across the country to develop an ecosystem that will foster innovation and technology development in the Aerospace & Defence sector by engaging industries including MSMEs, Startups, Individual Innovators, R&D institutes and Academia

## Defence Industrial Corridors

Development of 2 industrial corridors (Tamil Nadu & UP) dedicated exclusively for defence manufacturing



# UP DEFENCE INDUSTRIAL CORRIDOR

Announced by the Hon'ble PM Shri Narendra Modi at the UP Investors Summit in February 2018, the corridor leverages the existing manufacturing ecosystem in the state to create a robust and dedicated defence manufacturing space. Through efforts of the government and inherent advantages of the corridor, the region is ideally suited for economic testing and R&D facilities for the defence sector.

#### Existing ecosystem in the state:

- 9 Major Ordnance Factories
- Home to 3 major manufacturing units of Hindustan Aeronautics Limited (HAL) and one major Bharat Electronics Limited (BEL) unit
- Major existing R&D institutes in the state include those of Defence Research and Development Organisation (DRDO), Aerospace Systems & Equipment R & D Centre - Hindustan Aeronautics Limited (AASERDC-HAL), etc.

#### Existing enabling infrastructure:

- Its location on the Golden Quadrilateral with an excellent road network
- The catchment area of Amritsar Kolkata Industrial Corridor Project (AKIC) and Eastern Dedicated Freight Corridor (EDFC) right alongside it

- The Agra-Lucknow Expressway
- Major national and international airports connecting the rest of India
- Strong Logistics infrastructure – at Kanpur, Dadri, Boraki, Varanasi

#### Investment opportunities in the corridor:

- Defence Park at Jhansi, Agra, Kanpur
- Aerospace Park at Lucknow, Kanpur, Agra
- Expansion of Defence Public Sector Units (DPSUs)

#### The state government has formulated a Defence & Aerospace Manufacturing Policy focused on:

- Attracting Defence PSUs, Mega and Anchor projects
- Promoting development of Private Defence Parks with plug and play facilities
- Supporting industry-specific incentives including rebate on freight and transportation charges, for developing R&D testing facilities and capacity building towards patent & registration fee are also offered



#### MAJOR NODES

- |           |              |
|-----------|--------------|
| • Aligarh | • Agra       |
| • Jhansi  | • Chitrakoot |
| • Kanpur  | • Lucknow    |



# ABOUT LUCKNOW

While Lucknow is an integral hub in the Uttar Pradesh Defence Corridor, it is also a multicultural city known for its courtly manners, beautiful gardens, poetry, music, and fine cuisine. All of this was patronized by the erstwhile Nawabs of the city, who incidentally lent the city its moniker of City of Nawabs.

The city is also home to several architectural beauties such as Bhul Bhulayyan (Bada Imambara), Ghanta Ghar, Shahi Baoli, Residency and Rumi Darwaza. The city is, however, most famous for its delectable Awadhi cuisine. It is no exaggeration to say that Lucknowi food is fit for kings as many of the most well-known dishes (most notably the kebabs, biryanis and kormas) were indeed created for the Nawabs and their courts.

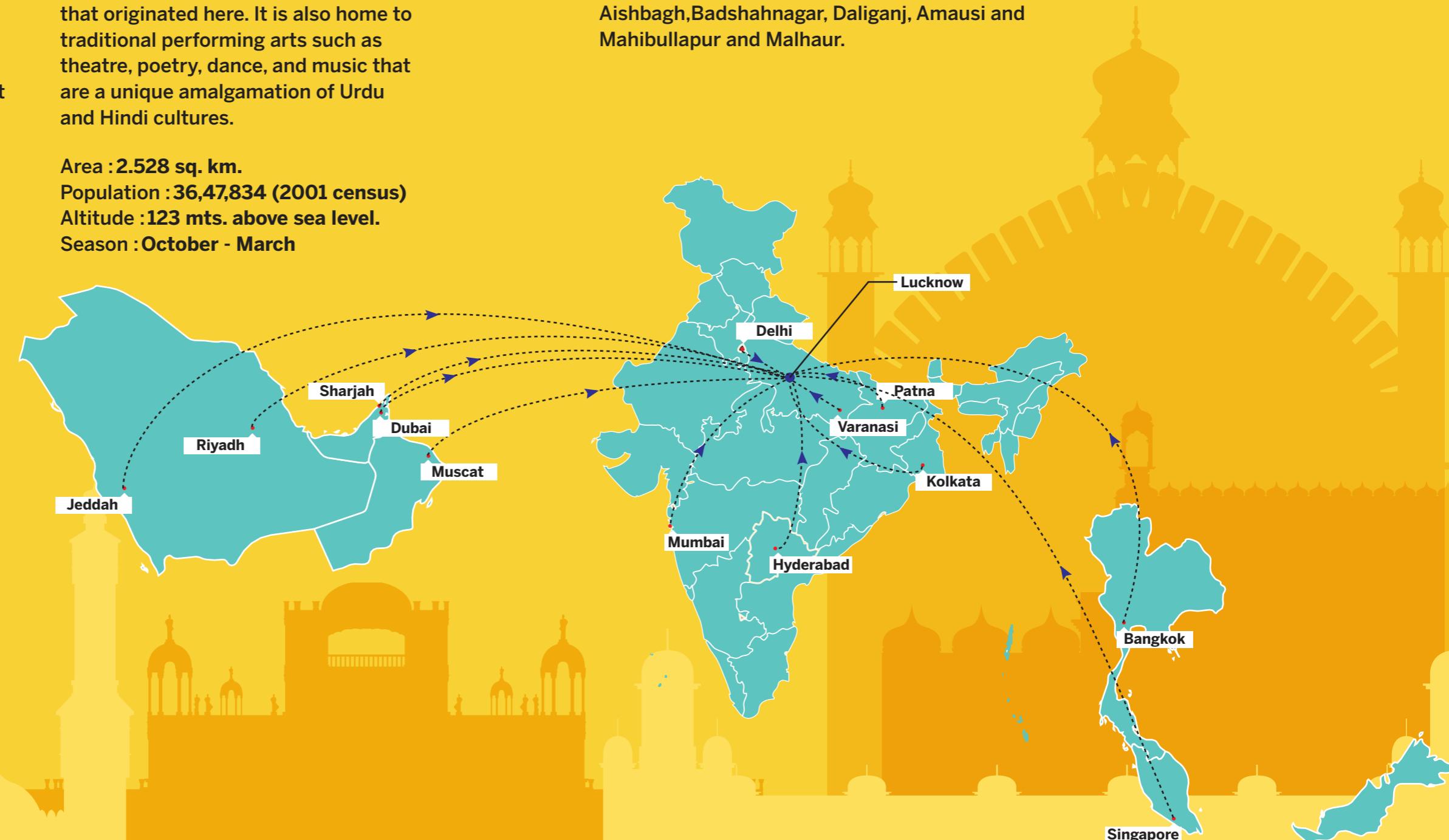
Lucknow also boasts a rich artisanal heritage as best exemplified by the intricate chikankari embroidery work that originated here. It is also home to traditional performing arts such as theatre, poetry, dance, and music that are a unique amalgamation of Urdu and Hindi cultures.

**Area : 2.528 sq. km.**  
**Population : 36,47,834 (2001 census)**  
**Altitude : 123 mts. above sea level.**  
**Season : October - March**

## Getting there

Lucknow's Chaudhary Charan Singh Airport (15 km from Hazratganj) is directly connected by regular flights with Delhi, Patna, Kolkata, Mumbai, Varanasi, Hyderabad and Sharjah, Muscat, Jeddah, Dubai.

A major railway junction, Lucknow is conveniently linked with prominent cities through Northern Railway and North Eastern Railway. Major railway stations are Charbagh, Lucknow Junction, Lucknow City Junction, Aishbagh, Badshahnagar, Daliganj, Amausi and Mahibullapur and Malhaur.





रक्षा उत्पादन विभाग  
DEPARTMENT OF  
**DEFENCE PRODUCTION**



**INVEST INDIA**  
NATIONAL INVESTMENT PROMOTION  
& FACILITATION AGENCY

[defexpo.gov.in](http://defexpo.gov.in) | [@DefExpoIndia](https://twitter.com/DefExpoIndia) | [@DefexpoIndia20](https://facebook.com/DefexpoIndia20) | [investindia.gov.in](http://investindia.gov.in)

**ddpmod.gov.in**