

# Overall urban opportunity of £50 Bn over next 5 years in India; both local and international players are participating

Opportunity breakup <sup>1</sup> (in £ Bn)		Indicative EBIDTA	Indian players	MNCs	Key observations	
Smart City	ICT e.g. smart Parking, WiFi	2-3	~15%	<ul style="list-style-type: none"> <li>L&amp;T, HFCL</li> <li>Sterlite</li> <li>Indus Towers</li> </ul>	<ul style="list-style-type: none"> <li>Cisco – for equipment</li> </ul>	<ul style="list-style-type: none"> <li>MNCs supply equipment, and Indian cos. take up end-to-end implementation</li> </ul>
	Large civil projects e.g. flyovers, roads	2-3	~12%	<ul style="list-style-type: none"> <li>L&amp;T</li> <li>GMR, Reliance</li> </ul>	<ul style="list-style-type: none"> <li>Siemens</li> <li>GE</li> </ul>	<ul style="list-style-type: none"> <li>Indian players have a cost advantage</li> </ul>
	Low capex soln. e.g. street furniture	0.5-1	~12%	<ul style="list-style-type: none"> <li>Regional players</li> </ul>	<ul style="list-style-type: none"> <li>NA</li> </ul>	<ul style="list-style-type: none"> <li>Low ticket size (&lt; £6 Mn)</li> <li>Not strategic objective</li> </ul>
	Consulting	0.25	~30%	<ul style="list-style-type: none"> <li>RITES</li> <li>TCS</li> <li>WAPCOS</li> </ul>	<ul style="list-style-type: none"> <li>Atkins, AECOM</li> <li>Royal Haskoning</li> <li>EGIS</li> </ul>	<ul style="list-style-type: none"> <li>Master planning, PMC (Low profit pools)</li> </ul>
	<b>Total</b>		<b>4-7</b>			
Overall city	Water/waste water management	5-6	~12%	<ul style="list-style-type: none"> <li>Thermax</li> </ul>	<ul style="list-style-type: none"> <li>Veolia</li> <li>Wabag</li> </ul>	<ul style="list-style-type: none"> <li>MNCs provide planning, expertise and tech (e.g., Kyoto-Varanasi deal<sup>2</sup>)</li> </ul>
	Metro/LRT	15-17	~16%	<ul style="list-style-type: none"> <li>Reliance</li> <li>L&amp;T</li> </ul>	<ul style="list-style-type: none"> <li>Siemens, GE</li> <li>Alstom</li> <li>CRRC</li> </ul>	<ul style="list-style-type: none"> <li>Masterplanning + PMC + O&amp;M</li> <li>Supply of locomotives</li> </ul>
	BRT	6-7	~16%	<ul style="list-style-type: none"> <li>RITES</li> <li>IIT Delhi</li> <li>Tata Marcopolo</li> </ul>	<ul style="list-style-type: none"> <li>Volvo</li> <li>Mercedes</li> </ul>	<ul style="list-style-type: none"> <li>Masterplanning + PMC + O&amp;M, Supply of buses</li> <li>Acad., PSEs in planning</li> </ul>
	Smart power	1	~10%	<ul style="list-style-type: none"> <li>Gram Power</li> <li>AST</li> <li>Tara</li> </ul>	<ul style="list-style-type: none"> <li>Texas, RICOH</li> <li>STMicroelectronics</li> </ul>	<ul style="list-style-type: none"> <li>Services+ contracting for renewables/ energy eff. design and equipment</li> </ul>
	Healthcare delivery	15-17 <sup>4</sup>	~12%	<ul style="list-style-type: none"> <li>Apollo Hospitals</li> <li>Medanta medicity</li> </ul>	<ul style="list-style-type: none"> <li>IHH Healthcare Berhad</li> <li>King's college</li> <li>Caryle Group</li> </ul>	<ul style="list-style-type: none"> <li>Lead integrator doing Masterplanning + PMC + O&amp;M + Supply of equipment/technology</li> </ul>
	<b>Total</b>		<b>40-45</b>			

1 Includes domains where opportunity is relevant to UK companies participation (other sectors like roads and transportation are dominated by Indian players)  
 2 Modernization of water/waste mgmt. infra 3 For generation + Independent power producers (IPP) 4 India's universal health plan cost ~ Rs 1.6 Tn over next 4 yrs  
 McKinsey & Company 1