

2004. 5.

• •

---

.	가	.....	1
1.	12	.....	1
2.		.....	4
3.	가 가	.....	7
4.		.....	9
.		.....	12
1.		.....	12
2.		.....	15
3.	FTA	.....	18
.		.....	21
1.		.....	21
2.		.....	23
3.		.....	26
4.		.....	29
5.		.....	31
6.		.....	33
.		.....	35
1.		.....	35
2.		.....	37
3.		.....	39
4.		.....	41

---

5.	.....	45
6.	.....	47
7.	.....	49
<	> .....	50

•           •

---

< -1>	(2002) .....	1
< -2>	.....	4
< -3>	.....	5
< -4>	.....	6
< -5>	.....	6
< -6>	.....	8
< -7>	.....	8
< -8>	.....	9
< -1>	.....	22
< -2>	. . . . .	24
< -3>	.....	27
< -4>	.....	30
< -5>	.....	31
< -6>	(2000 ~ 2001) .....	32
< -1>	.....	35
< -2>	(2003. 12) .....	36
< -3>	.....	39
< -4>	가 (1995 ~ 2003) .....	47

•                    •

---

<    -1>                    .....3

<    -1>                    (                    ) .....38

# I. 가

1. 12

- 2 1980  
가

• 2002 가 GDP 5,610  
12 .

• 가 (Purchasing Power Parity : PPP)<sup>1)</sup>

< -1> (2002)

GNI( )		10.110	4.266	1.210	0.473	0.501
GNI(PPP)		10.110	3.315	5.625	0.785	2.691
1 ( )		35,060	33,550	940	9,930	480
1 (PPP)		35,060	26,070	4,390	16,480	2,570
		6,939	4,167	3,256	1,625	493
		12,024	3,372	2,952	1,521	565
		2.88	1.27	12.81	0.48	10.48

: World Bank(2003), IMF(2004).

1) 가 : 가 가 .

2 6,910 , ,  
(World Bank, 2003).

4

Goldman Sachs(2003)

-

BRICs 가 , ,  
40 BRICs  
G6 .

“ 가 ”  
•2004 2 “ 가  
” 가  
가 .  
• 가 30%  
가 , “  
” .  
• 2004 5  
(BJP) 가 ,  
.

: , 2004. 2. 4.

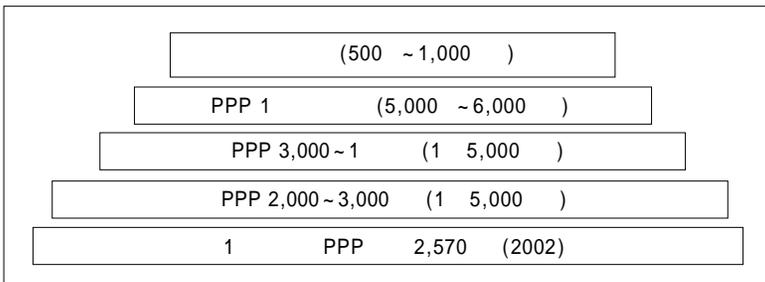
• 가 2020 ,  
2030 ,

- , 1 2.0%가  
가

• 2002 1 480  
. Goldman Sachs(2003) 가 5~6%  
2015 1 1,149

•  
1,000 , 1 (PPP  
) 5,000 ~ 6,000

< -1>



: Ministry of Commerce & Industry(2003a).

2.

- 1970  
 , 1980  
 , 1990 .

가 .

- 1980 ~ 90 5.8%
- 1990 ~ 99 6.1%
- 3.2%, 2.5%

- 2000 가 ,
- 2003/04 7%

< -2>

: %

	1980 ~ 90	1990 ~ 99	2000	2001	2002	2003 <sup>1)</sup>
	5.8	6.1	5.4	4.2	4.7	7.2
	10.1	10.7	8.0	7.5	8.0	7.5
	9.4	5.7	9.3	3.1	6.2	3.0
	3.2	2.5	4.8	2.4	3.0	3.2

: World Bank(2004), IMF(2003).

: 1) 2003

- 가  
(IT),  
가 .
- 1980  
1990 10  
1990 20 ~ 40  
. 2002 34 가 .
- 1991 2003 11  
2 4,818 , 2 8,968 .  
가 가 ,  
5,527  
22.3% .

< -3>

	1991 ~ 96 ( )	1997	1998	1999	2000	2001	2002
	1,085	3,619	2,633	2,168	2,319	3,403	3,449
	25,476	44,237	43,751	40,319	40,772	46,846	52,700
	1,234	2,844	5,412	9,333	9,283	3,528	1,972

: UNCTAD(2003).

< -4>

( : 1991.8 ~ 2003.11.30 )

: ,

( , )	972	3.9	777,496	26.8
	913	3.7	572,542	19.8
.	5,527	22.3	287,837	9.9
	1,703	6.9	219,496	7.6
( )	1,127	4.5	188,988	6.5
( , )	760	3.1	155,167	5.4
( )	1,867	7.5	130,442	4.5
가	919	3.7	95,301	3.3
	24,818	100.0	2,896,801	100.0

: Secretariat for Industrial Assistance(2003).

< -5>

: %

	1980	1990	2000	2001	2002	가			
						1980~1990	1990~2000	2001	2002
	8,586	17,969	42,379	43,347	49,312	7.7	9.0	2.3	13.8
	14,864	23,580	51,294	49,618	56,517	4.7	8.1	-3.3	13.9

: IMF(2003b).

.

1993

10

46%

- 1980 ~ 2002

8.3%

가

5.7 . 2003/04

500

- GDP 1980 0.4%  
1991 5.8%, 2001/02 9.4%

3. 가 가

-

, 가 .

- GDP 1970/71 46.3%  
2001/02 23.9%  
12.6% 16.8% ,  
38.3% 54.6%

- 1990 ,

, , , ,

. , , ,

가

.

•

40%

&lt; -6&gt;

: %

			( )	
1970~1971	46.3	15.6	(12.6)	38.3
1975~1976	44.3	16.2	(12.8)	39.7
1980~1981	39.7	17.6	(13.8)	42.7
1986~1986	36.3	19.4	(15.2)	44.3
1990~1991	32.2	21.7	(16.6)	46.1
1995~1996	28.0	23.0	(17.9)	49.0
2000~2001	23.8	22.0	(17.2)	54.1
2001~2002	23.9	21.5	(16.8)	54.6

: Reserve Bank of India(2003).

&lt; -7&gt;

: %

	1987/1988	1990/1991	1995/1996	2000/2001	2001/2002
	67.8	71.6	74.7	77.1	75.6
	16.7	16.1	16.6	16.6	16.7
	9.5	12.4	13.8	15.3	15.7
	11.6	12.3	11.6	12.5	11.4
	9.0	8.5	11.1	11.0	10.1
가	8.0	8.0	5.5	4.4	4.3
	21.2	18.5	19.1	13.4	13.4
	5.0	5.3	3.7	2.6	2.8
	4.1	2.9	1.4	4.2	4.8

: Reserve Bank of India(2003).

• 1987/88 21.2% 2001/02 13.4%  
67.8% 75.6% 가 .

• , , . , 가  
1990 ( )

4.

- 1990

• IT 1997~2002 GDP  
4 가 27% . 가

IT  
IT

• IT 가 IT  
1997 58.5% 2002 75.5% .

< -8 >

	1996	1997	1998	1999	2000	2001	2002
	11.0	17.6	26.0	39.6	62.2	76.5	98.8
	3.8	4.9	7.6	10.6	13.8	17.0	20.4

: (2002).

- 1999 9 가 1996 11 가 2002 .

• 3.8% 20.4% 가

- 1985 6,800 2003 3 IT 65

• IT GDP 1997 1.2% 2002 3.2% ,

•

-	15
-	2
-	
-	2
-	10

R&D				
-	500	100	가	R&D
-	255			.
-	GE		가	R&D
(	1,600	)		
	15			
-				
-	Ford India	Ikon		
-	Indica	Rover City		
-	Hero Honda			
(	170	)		
-	2003/04	150		가
-	TV	가	10%	가
-				

: Ministry of Commerce & Industry(2003a).

## II .

### 1. .

- 1991 10 IMF 18 16 5,600  
SDR (Stand-by loan)

• “ - ”(Rao-  
Manmohan Model) “ Washington  
Consensus”

• 10 .

- 가 , , .

• 가 1990  
9 .

## Washington Consensus

1980

IMF

(Neo-liberalism)

, John Williamson(1994 : 26-28)

9가

:

가

• (SEBI) ,

- , ,  
, 가

• (EOU : Export-Oriented Units)  
, 가 (EPZ : Export Processing Zons)

• . 1991 7  
22% 가 1993 3

- 가

•

1991 7

100%

(FIPB)

2000

2.

- 10

가

가

가

가 1

500

가

500 ~ 1,000

가

• Washington Consensus

가

가

Goldman Sachs

30

가

1991 가

가

1948 (Congress)

“ ”

1977 ~ 80

1980

1990 가

IMF

1991 6 (Narasimha Rao) IMF

1996

(BJP) 가

(Vajpayee)

### 3. FTA

- 1990  
가 (FTA)
- 1975 5  
(Bangkok Agreement : BA),  
2000 4 가

(Bangkok Agreement : BA)

- 1975 UN (ESCAP)  
, , , , , ,  
7  
5 가 1976 1
- 2000 4 WTO 가  
가 25
- 가가 가
- ESCAP(<http://www.unescap.org>)

- 
- 1985 6  
(South Asian Association for Regional Cooperation:  
SAARC)
  - SAARC 7
  - SAARC 1993 (SA Preferential  
Trading Arrangement : SAPTA)  
1995 12 5,500
  - 2001 SAPTA  
(SAFTA)  
1998
  - 1998 12 (FTA)  
, , 3
  - 2002 11 -ASEAN  
가 ,

FTA

• 2003 6

가

,

700

### III

1.

-	1990		
	.		
• 2002/03	119	1993/94	
46%	.	52%	
2002/03	19%	.	
•	2002/03	99	
	32	.	
•			
	.		
-		가 가	
	,		
	,		
	.		

< -1>

:

	2000/2001	2001/2002	2002/2003( )
	74.4	93.0	119.2
	20.6	24.0	31.5
	59.0	77.0	98.9
	5.2	8.0	11.2

: NASSCOM Homepage(<http://nasscom.org>).

- 10  
가

- 가 ,  
가

- 가 1980

- (NASSCOM)

, ,

-

, R & D

가가 가 .

• R & D ,

• 300 170  
(ISO) ISO 9000 (2000 ).

가  
(SEI-CMM) 가 (Level 5)  
80 가 52  
(2002 ).

• Bioinformatics ,  
- 가가 ,

2.

- 1990 . 2002

45 , 100 ,  
 27 .  
 • 2002/03 18.6%  
 가 . 3 2 가  
 27.5%, 19.6% 가 가 4  
 11.5% 가 .  
 • 630 ,  
 56 , 20 , 16 4  
 92 . 3 27 , 2  
 511 .  
 • 65.4% 가 , 7 ,  
 1 4 8 가 . 3

< -2> . .

: , %

	2001/02			2002/03			(2002/03)		
4	500,301	509,088	49,273	557,709	541,738	69,977	11.47	6.41	42.02
	162,508	146,671	11,870	202,946	191,201	10,704	25	30	-10.0
	169,418	166,028	3,892	163,260	166,340	1,676	-3.63	0.19	-57.0
	832,227	821,787	65,035	923,915	899,279	81,357	11.01	9.43	25.1
3	212,748	200,276	15,462	271,224	226,052	43,443	27.49	12.87	180.97
2	4,271,327	4,203,725	104,183	5,109,415	4,873,985	179,568	19.62	15.94	72.36
	5,316,307	5,225,786	184,680	6,304,556	5,999,320	305,368	18.59	14.80	65.36

: (2003a).

4 , 2 18 .

- 가 150 가

•

- BMW, GE, 15 가

, , ,

• 1998 Santro

,  
. 2003 5 가 40  
1

• 2 Hero Honda가 2001/02 140

-  
(hub) 2002  
(New Auto Policy) .

• 4 1 , 3

2,500

, 100%

•

, ,

•

, ,

,

• 2003 7

.

3

2,740

.

### 3.

-

1990

가

가

• 2002/03

가

79 3,000

, 3,500

가 (37%),

(25%),

(32%)

.

- 가 LG, Samsung, Phillips, Sony, Panasonic  
가 , 1995/96

5 가 2  
가 가 40%

• TV 10 TV  
600  
가

• 2002/03 1 4,200 가 가 TV  
가 42% 가  
TV 10%

- IT

. 2002/03

< -3>

	1995/1996	1996/1997	1997/1998	1998/1999	1999/2000
가	58.00	65.00	76.00	92.00	112.00
	29.00	31.00	31.50	33.00	34.00
	22.25	27.40	28.00	23.00	20.00
	26.00	30.00	32.50	44.00	44.00
	10.75	13.00	9.00	13.00	14.50
	35.00	37.00	44.00	47.50	52.00
	181.00	203.40	221.00	252.50	276.50

: Ministry of Information and Technology(2002).

75%가

- 가 WTO (Information Technology Agreement) IT

- 60%

가

- 2001/02 5 , 84 ,  
6 4,000

- 가

가

- 2002/03 9% 가 13  
2,000

- 2008

가 1,600

160

가

- 1999 36 5,000 2008  
480

4.

- 1990  
10% ,  
가 .
- 8 2001  
242 , 166 ,  
190 ( 544 , 482 ).  
4 180
- , 가 610  
( 1,518 ).
- 1 3kg 10kg,  
19kg ,  
가 .
- RIL(Reliance Industries Ltd.) 가  
2002 IPCL(Indian Petrochemicals Corporation)  
, 75%  
GAIL(Gas Authority of India  
Ltd.), HPL(Haldia Petrochemical Ltd.)
- 1990 RIL(Hazira, 7 5,000 ), GAIL(Auriya,

&lt; -4&gt;

: , %

		1999	2000	2001	2005	(2000 ~ 2005)
		1,627	2,425	2,425	4,825	14.8
		1,350	1,750	1,900	2,950	11.0
		1,425	1,802	1,995	2,885	9.9
		-75	-52	-95	65	
		803	1,601	1,659	2,202	6.6
		709	1,154	1,391	1,900	10.5
		770	1,135	1,405	1,873	10.5
		-61	19	-14	27	
LD/LLD		688	915	915	1,180	5.2
		439	602	674	1,180	14.4
		528	582	652	1,192	15.4
		-89	20	22	-12	
HDPE		873	1,130	1,130	1,545	6.5
		715	974	973	1,545	9.7
		726	835	960	1,321	9.5
		-11	139	13	233	
PVC		758	849	849	999	3.3
		701	720	720	1,000	6.8
		672	766	858	1,051	6.5
		29	-46	-138	-51	
PP		1,160	1,370	1,370	1,400	0.4
		820	1,302	1,302	1,400	1.5
		910	1,092	1,299	1,397	5.0
		-90	210	3	3	

: (2003a).

30 ), ICPL(Gujarat, 30 ), Haldia(West Bengal, 42 )  
 ) 2005

가

5.

- 1907  
 , 10  
 , .
- 2002 9 45 (EAF), 661  
 (IF) 3,787  
 . 2001/02 3,201 .
  - 1999/2000 300 , Hot &  
 Cold Rolled Coil 220 .  
 2000/01 1 24kg  
 87kg, 654kg, 422kg, 340kg

&lt; -5&gt;

:

	1996/1997	1997/1998	1998/1999	1999/2000	2000/2002	2001/2002
Pig Iron	3.29	3.39	3.00	3.16	3.11	4.65
Sponge Iron	5.00	5.32	5.11	5.34	5.44	6.18
	22.72	23.37	23.82	26.71	29.70	32.01

: UK Trade & Investment(<http://www.tradepartners.gov.uk>).

• McKinsey 100  
 25 가 .  
 가 , , ,  
 , ( )  
 ).

- SAIL 50%, TISCO  
 가 25% , 6 가  
 85% .

- 1991 가 가 ,  
 ,  
 .

< -6> (2000 ~ 2001)

	CAPA			
SAIL	10.0	9.7	3,688	
Salem	0.07	0.04		STS,
TISCO	3.3	3.2	1,685	가
ISPAT	3.0	0.5	486	
ESSAR	2.2	1.6	506	
JVSL	1.6	0.6	292	
Jindal Strips	0.25	0.33		STS
RINL	2.4	2.4	N/A	

: (2003a).  
 : TISCO, JINDAL .

6.

- 가 2,000  
20%

• 2001/02 가 44  
가 50

• 가 65%

가

- , 1990

• 가 , 가 ,

• 1993 가 가  
, 1997

가

- 
- 2004 (MFA : Multi Fibre Agreement)  
, (TUFS : Technology Upgradation Fund Scheme)  
.
  - 2/3 (20%),  
(20%), (13%) 3  
가 가 .

## IV. .

### 1.

- 1990 7 2,000 2003  
40 9,000 13 5.8 ,
- 6.6 2003 28 5,000  
, 4.4 12 3,000 .
- 1990 ~ 99 13.5% 가  
2000 ~ 2003 29.1% 가 .  
1990 ~ 99 11.7% 가 , 2000 ~ 2003  
가 7.7% .

< -1>

: , %

	1990	1999	2000	2001	2002	2003	가	
							1990 ~ 99	2000~2003
	435	1,362	1,326	1,407	1,384	2,853	13.5	29.1
	283	768	985	1,106	1,249	1,232	11.7	7.7
	153	594	341	302	135	1,620	16.3	68.1
	718	2,130	2,311	2,513	2,633	4,085	12.8	20.9

: KOTIS(<http://www.kotis.net>).

2003 10 16 2,000 106% 가  
 - 2003 1.1%  
 1.3% 13 , 1.0% 27

< -2> (2003. 12) : , %

	2001	2002	2003		2001	2002	2003
	452 (52.0)	420 (-0.7)	1,102 (162.2)		359 (67.3)	422 (17.7)	424 (0.3)
	398 (35.6)	392 (-1.4)	972 (147.8)		237 (-13.4)	260 (10.1)	263 (1.0)
	171 (-24.9)	191 (11.4)	285 (49.0)		190 (34.8)	220 (15.8)	171 (-22.4)
	141 (-6.7)	150 (6.0)	210 (39.8)		136 (-13.3)	161 (18.9)	145 (-9.9)
	150 (-5.6)	130 (-13.3)	172 (9.0)		87 (1.6)	73 (-16.7)	131 (80.6)
	48 (-64.5)	51 (5.9)	80 (57.0)	가	31 (56.2)	35 (14.9)	31 (-11.5)
	1,408 (6.2)	1,384 (-1.7)	2,853 (106.1)		1,106 (12.3)	1,249 (13.0)	1,232 (-1.3)

: KOTIS(<http://www.kotis.net>).

: 1) MTI 1

2) ( )

• 2002 ~ 2003 22  
 ( 1.23%) , 9 ( 2.24%) .

- ,

• 2003 106.1% 가  
 , 162.2%, 가 147.8%  
 가 CDMA

## 2.

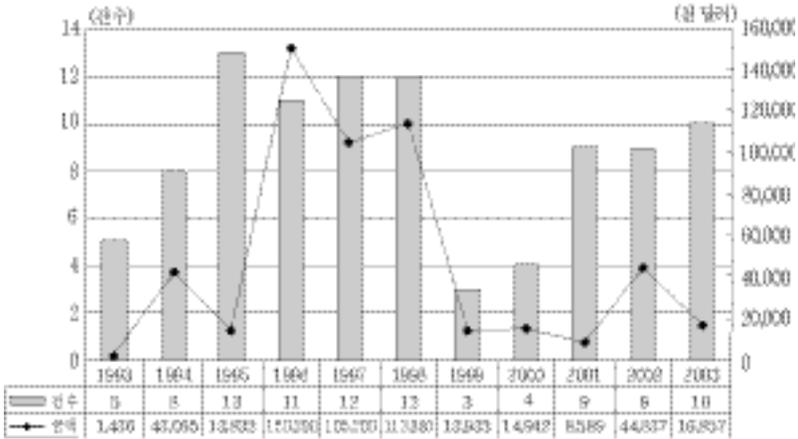
- 2003 109 , 5 3,300

• 1995 ~ 98 ,  
 IMF 1999 ~ 2001  
 2002 가 1990

• 1980

가

< -1> ( )



: (2003).

• 1990 가 , 가

- 가

• 2003 83%

14.5%

92%

< -3>

(2003 )

:

		( )			
	405,919	73,395	5,988	6,597	491,899
	32,542	4,071	419	1,352	38,384
	1,364	23	1,711	15	3,113
	439,825	77,489	8,118	7,964	533,396

: (2003).

3.

-

가 .

• 1990 , LG

가 .

- LG 가 ,

1 .

3 1 2

.

• LG 2002 50% 가 7

, 2003

45% 가 .

- (SIEL : Samsung India Electronics Ltd.)

2003 1 ~ 5 100%

TV 61 5,000  
200%

- 2003 36%

가 , 15

- 가

가 .  
가 .

- 3 2002 20  
13 8,000 1.5 .

- 가 가 .

- 가  
가 .

- (KOTRA)가 80  
50%가  
가 .<sup>1)</sup>

1) KOTRA (FICCI)  
KOTRA, 「 2003 6 12 .

---

• “ ”

100%가 “ ”

“ ”

50%

“ ”, 25% “ ”

가

가

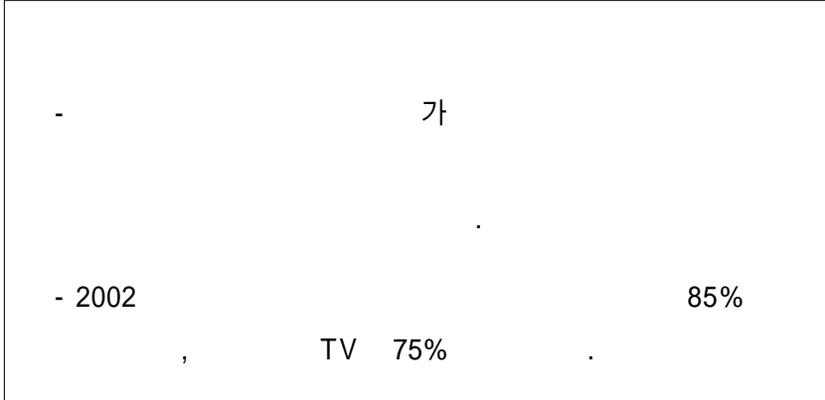
4.

가

가

가





: KOTRA, 「, 2004 2 9 , (2003b).

•

•

•

•

가

가

가

가

가

가

-

- 가 .
- 가 , 가
- 가

•

-

- 가 ,
- 가 가 .
- , KOTRA
- , , ,
- 가 .

-

- , 가 .
- SAARC SAPTA  
가 FTA  
가 .  
, SAARC  
가 .

-

- 가 .
- .
- -
- 

5.

-

-

, ,

• ( 35.875% ,  
 ) 40 ~ 41%

•

•

가

•

•

•

• 가 , , 가

-

가 .

## 6.

- 1990

가

• 가  
가 가 가

• (WTO, 2004)  
1995 ~ 2003 379 (329),  
EU(274), (72) 가

< -4> 가 (1995 ~ 2003)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	
	6	21	13	27	65	41	79	81	46	379
	14	22	15	36	47	47	76	35	37	329
	NA	NA	NA	NA	NA	6	14	30	22	72
	157	224	243	256	355	294	366	311	210	2,416

: WTO(2004).

- 
- 가 27 (69),  
EU(33) (26),  
(20), 가 (18), (15), (14),  
(14) .
  - (2003b:6) 1991/92 ~ 2002/03  
175 ,  
153 , 70 ,  
28 , 14 , 13 , 14  
.
  - 2  
가 ,  
.
  - WTO 가  
,  
가  
.
  - ( , 가 )  
,  
,  
.

---

7.

-

, 가 .

•

,

•

가 .

•

, 2001 CDMA

,

.

< >

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