



Confederation of Indian Industry

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# Northern India: Heralding the next chapter of growth and development

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Knowledge Partner

**KPMG**

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# 1. Introduction to Northern States







# Executive summary

The northern region is among the largest regions in India comprising eight states — Jammu & Kashmir, Himachal Pradesh, Punjab, Uttarakhand, Haryana, Delhi, Rajasthan and Uttar Pradesh and UT Chandigarh. The Northern region has consistently outperformed India's national average in terms of GDP, with the region accounting for approximately 26 percent of national GDP. However, sustaining this growth rate will require greater investments, continuous support of the government, expansion of infrastructure, accessibility to educated professionals and access to skilled labour.

The 'Invest North 2014 – Compendium of opportunities in Northern states' report, CII along with KPMG present an overview of the Northern region and summarize the advantages of investing and doing business across the respective states. Identified within this report, are the unique combination of complementary strengths of high economic growth rate, abundance of natural resources, growing infrastructure, rising consumer demand and continuous government support.

Various important projects have been initiated/announced for the development of different sectors in the states of the northern region, to be taken forward in a Public-

Private Partnership (PPP) model. In addition to the central government projects, there are several projects and other initiatives undertaken by the state governments. Some state governments are working towards announcing long term measures (reforms), such as instituting single window clearance mechanism. Few others are proactively holding bilateral discussions with domestic and international investors. Almost all the states have demarcated industrial areas to ease investment.

The report provides a detailed account across the northern Indian states with an overview of demographics, identifies key sectors and investments, describes the state of infrastructure, highlights advantages of ease of doing business, and illustrates key initiatives and projects being performed across these states.

We take pleasure in presenting the joint CII - KPMG in India report on 'Invest North 2014 - Compendium of opportunities in Northern states' to you.

We hope this report serves as a reference point on highlighting the advantages of investing and doing business across the Northern Region and helps identify investment opportunities in Northern States.



## 1.2

# The Northern region: An introduction

The northern region is among the largest regions in India comprising of eight states - Jammu & Kashmir, Himachal Pradesh, Punjab, Uttarakhand, Haryana, Delhi, Rajasthan and Uttar Pradesh and UT Chandigarh. Together, these states and UT account for nearly 30.7 percent of the total area of India. Rajasthan is the country's largest state by area, accounting for nearly 10 percent of India's total area and 34 percent of northern region's area. This large area of the northern region accounts for a sizeable population as well. With more than 368 million people, the region accounts for nearly 31 percent of India's population residing in the country.<sup>1</sup>

**Table: Geographic and demographic profile of northern region**

State/UT	Geographical area (sq km)	Share in northern region's geographical area (percent)	Share in India's geographical area (percent)	Population (million)	Share in northern region's population (percent)	Share in India's population (percent)
Chandigarh	114	0.01	-	1.1	0.3	0.1
Delhi	1,483	0.15	0.05	16.8	4.6	1.4
Haryana	44,212	4.37	1.3	25.4	6.9	2.1
Himachal Pradesh	55,673	5.51	1.7	6.9	1.9	0.6
Jammu & Kashmir	222,236	21.99	6.8	12.5	3.4	1.0
Punjab	50,362	4.98	1.5	27.7	7.5	2.3
Rajasthan	342,239	33.86	10.4	68.6	18.6	5.7
Uttar Pradesh	240,928	23.84	7.3	199.6	54.1	16.5
Uttarakhand	53,483	5.29	1.6	10.1	2.7	0.8
<b>Northern region</b>	<b>1,010,730</b>	<b>100.0</b>	<b>23.4</b>	<b>368.7</b>	<b>100.0</b>	<b>30.5</b>
<b>India</b>	<b>3,287,263</b>	<b>-</b>	<b>100.0</b>	<b>1,210.2</b>	<b>-</b>	<b>100.0</b>

Source: Census 2011

1. Population Census 2011

## Economic snapshot

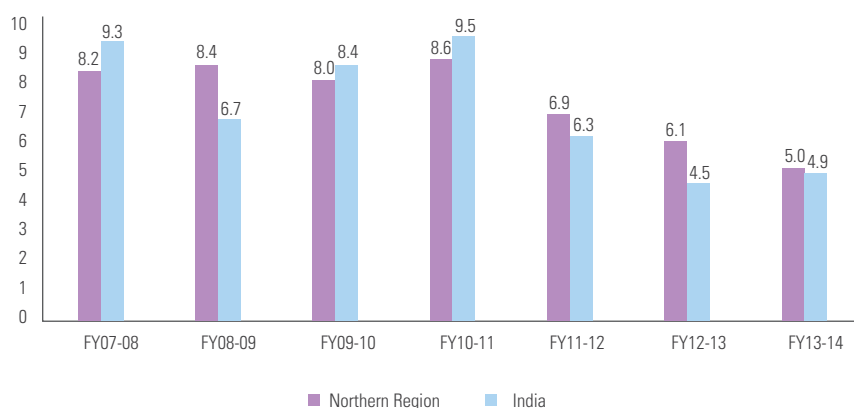
The northern region is an important part of India. Together the states/UT contributed approximately 26 percent to the national GDP (FY13). The region is home to states that are amongst the top five economies of the country. The region has many flourishing sectors such as IT/ITeS, hydro power, infrastructure among others, which witnessed significant growth in FY14 across various northern states. Noteworthy is the contribution of service sector to Delhi's GSDP is significant at approximately 90 percent as of FY14 (provisional).<sup>2</sup>



## GDP performance

The economic growth in the northern region has outperformed the growth in the rest of the country for the fourth consecutive year. The northern region's economy recorded a gross domestic product of 5.02 percent in FY14 (provisional) (excluding Chandigarh).<sup>2</sup> This has been majorly fortified by the growth in service sector followed by agriculture sector across all states in Northern India. At an all India level, owing to a rebound in farm sector, the economy grew at an annual rate of 4.9 percent as compared with a 4.5 percent expansion in FY13.<sup>3</sup>

**Figure: Comparison of GDP growth (percent)**



**Source:** MOSPI

Notes: Data at constant FY05 prices (as of June 2014)

FY14 data not available for Chandigarh (as of June 2014)

Share in northern region's GDP (of eight states, except Chandigarh for which data not available as of June 2014)

Chandigarh had GSDP of US\$3.0 billion in FY13 and CAGR of 7.4 percent during FY08-FY13

Data for FY14 is provisional (as of June 2014)

The northern region encompasses nine states/UTs which showed variable growth during FY09-FY14, with Uttarakhand leading the pack with a CAGR of around 11.2 percent during FY09-FY14.<sup>2</sup>

Uttar Pradesh is the largest contributor to northern region's GDP accounting for a share of 31.44 percent, mainly owing to its large population. It is followed by Rajasthan, Delhi, Haryana and Punjab.<sup>2</sup>

2. Ministry of Statistics and Programme Implementation (MOSPI)  
website accessed on 28 May 2014

3. MOSPI



**Table: State-wise economic growth (percent)**

States/UTs	Share in northern region's GDP (percent) – FY14 (provisional)	FY09-14 CAGR (percent)
Jammu & Kashmir	3.05	5.5
Himachal Pradesh	3.17	7.3
Punjab	11.62	5.8
Uttarakhand	4.90	11.2
Haryana	13.50	8.1
Delhi	15.86	8.7
Uttar Pradesh	31.44	6.3
Rajasthan	16.45	7.0
Chandigarh	*	7.4 (FY08 -13)

**Source:** MOSPI

Notes: Data at constant FY05 prices (as of June 2014)

FY14 data not available for Chandigarh (as of June 2014)

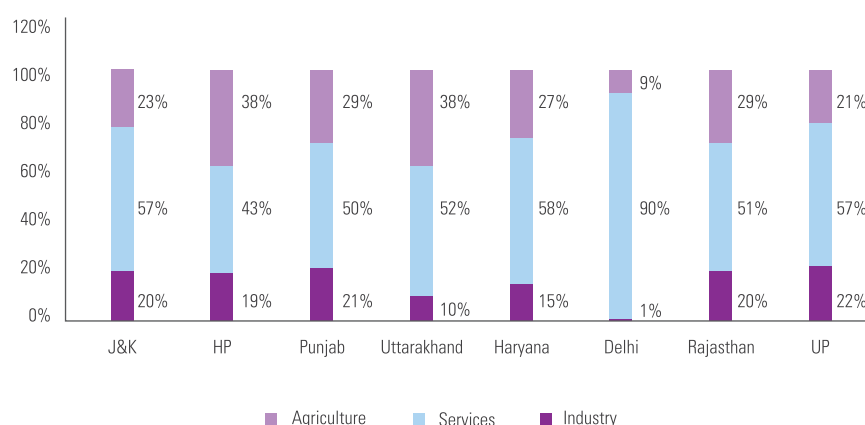
\*Share in northern region's GDP (of eight states, except Chandigarh for which data not available as of June 2014)

Chandigarh had GSDP of US\$3.0 billion in FY13 and CAGR of 7.4 percent during FY08-FY13

\*\*Share in northern region's GDP in FY14 (as of June 2014)

The composition of respective GSDPs has also undergone a change, with services sector accounting for the highest share in all the states/UT of the region. The share of services sector is the highest in Delhi (90 percent) and lowest in Himachal Pradesh (43 percent).<sup>2</sup>

**Figure: State-wise composition of GSDP (percent)**



**Source:** MOSPI

Notes: Data at constant FY05 prices (as of June 2014)

FY14 data not available for Chandigarh (as of June 2014)

Share in northern region's GDP (of eight states, except Chandigarh for which data not available as of June 2014)

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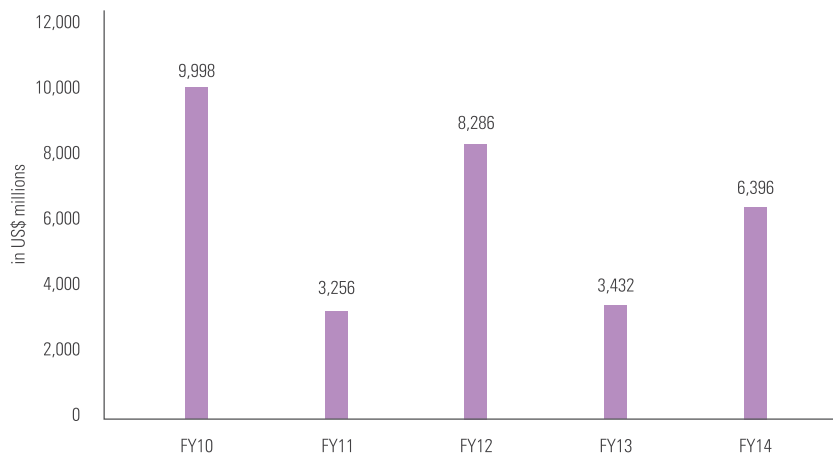
Data for FY14 is provisional (as of June 2014)

## Foreign direct investment (FDI)

Growing business opportunities on the back of rising consumer demand, increased government support, improving infrastructure and a host of other factors translated into investment inflow. During April 2000-April 2014, the northern region witnessed a FDI inflow of US\$45.5 billion, which accounted for a share of 27.9 percent in total FDI inflow in India during the period.<sup>4</sup> On an annual basis, the FDI trend has been volatile, influenced by a variety of factors — both domestic and global.



**Figure: Year-wise FDI inflow in northern region**



**Source:** Ministry of Commerce and Industry

Among the regions demarcated by RBI within North, Delhi (along with parts of Haryana and Uttar Pradesh) attracted highest FDI inflow of US\$43.05 billion during April 2000-April 2014, thus attracting a significant share of 94.7 percent of the total FDI inflows of Northern region. Positively, other states are undertaking measures to improve investor climate. These measures include introduction/extension of fiscal incentives, putting in place a mechanism for single window clearance, formation of land banks, increased supply of power and water.<sup>4</sup>

4. Department of Industrial Policy and Promotion (DIPP) website accessed on 28 May 2014



**Table: Region-wise cumulative FDI inflow during April 2000-April 2014 (US\$ million)**

RBI's region	States/UTs included	FDI inflow	Share in northern region's FDI (percent)	Share in India's FDI (percent)*
Delhi	Delhi and parts of Haryana and Uttar Pradesh	43,048	94.7	26.4
Chandigarh	Chandigarh, Punjab, Haryana and Himachal Pradesh	1,294	2.8	0.8
Jaipur	Rajasthan	724	1.6	0.4
Kanpur	Uttar Pradesh, Uttarakhand	385	0.8	0.2
Jammu	Jammu & Kashmir	4	0.01	0.002
<b>Northern region</b>	-	<b>45,455</b>	<b>100.0</b>	<b>27.9</b>
<b>India</b>	-	<b>163,801</b>	-	<b>100.0</b>

**Source:** Ministry of Commerce and Industry

**Notes:**\*The share in India's FDI has been calculated based on India total, which does not include Region not included and RBI's - NRI schemes

Though the northern region has performed well in terms of economic growth and foreign investment inflow, the opportunities have not been tapped to their full potential. Thus, the following sections, discuss both the sector-specific and project-specific investment opportunities in this region along with growth supporting factors and other initiatives undertaken by the respective state governments.



# Advantage north:

## Unique combination of complementary strengths

The Northern region of India has numerous unique strengths such as high economic growth rate, abundance of natural resources, availability of skilled labor, growing infrastructure, continuous government support, rising consumer demand backed by increasing income. Together, these factors make the region a viable investment destination.

### High economic growth rate

As discussed earlier, the northern region recorded higher growth rate than all-India average in FY14. This has been enabled by high growth recorded by the services sector followed by agriculture and then industry across all northern states.<sup>2</sup>



### Abundant natural resources

The northern region has a plethora of natural resources that offer opportunities for development of several sectors. Illustratively, high exposure to the sun in Rajasthan has enabled the state to explore and utilize the potential of solar power. Capitalizing on this natural resource, Rajasthan has emerged the second leading state (730 MW as of March 2014) in installed solar power capacity in India.<sup>5</sup>

Rajasthan, with more than 75 varieties of minerals, also offers potential for development of diverse industries, such as ceramics, glass, cement and solar equipment manufacturing.<sup>6</sup> This abundance of raw materials not only offers opportunities for development of industries within the region, but also offers scope for export of raw materials from the state.

Abundant water resources in Jammu & Kashmir, Uttarakhand, Himachal Pradesh and other states, offer immense potential for hydro power generation. With an installed hydro power capacity of 16,331 MW as on 30 April 2014, the northern region accounted for 40 percent of India's total hydro power capacity.<sup>7</sup>

Further, the geographical terrain, soil and climatic conditions of hill states, such as Jammu & Kashmir, Uttarakhand and Himachal Pradesh is suitable for production of several fruits. In fact, Jammu & Kashmir is the leading producer of almonds and walnuts in India. The state along with Himachal Pradesh leads all other states in the production of apples in the country. This not only highlights the potential for horticulture sector but also lays the foundation for agro processing industries engaged in manufacture of pulps, jams, jellies, etc.

High agricultural produce in states such as Punjab, Haryana and Uttar Pradesh also supports the growth of agro-processing industries on one hand and power generation on the other, as agri-residual can be used for the same. Punjab, due to high production of cotton, has laid the basis for the development of textile mills.



2. Ministry of Statistics and Programme Implementation (MOSPI) website accessed on 28 May 2014

5. Rajasthan Renewable Energy Corporation Limited

6. Bureau of Investment Promotion, Government of Rajasthan

7. Central Electricity Authority (April 2014)



## Developing infrastructure

Infrastructure development enables lowering of cost and time, and increases investment whether it is in power, roads, rail network, communication or technology. Given this crucial role played by the infrastructure sector, the northern region states have been continually working towards improving the same. The installed power capacity of the northern region was 64,464 MW in April 2014.<sup>7</sup> Likewise, the road network grew by 5.1 percent from 913,648 km in FY11 to 960,284 in FY12.<sup>8</sup> In case of teledensity, of the top five states, three states belong to the northern region – Delhi, Himachal Pradesh and Punjab as of May 2014.<sup>9</sup>

Further, the Central Government has initiated projects, such as the Delhi Mumbai Industrial Corridor (DMIC) that will cross Delhi, Rajasthan, Uttar Pradesh and Haryana. The DMIC is a US\$90-100 billion project that will cover 1,483 km, of which 52 percent will lie in the northern region.<sup>10</sup>

Besides, several road projects and metro rail links are underway in the northern region. These projects will boost economic activity through investment inflow and employment generation.



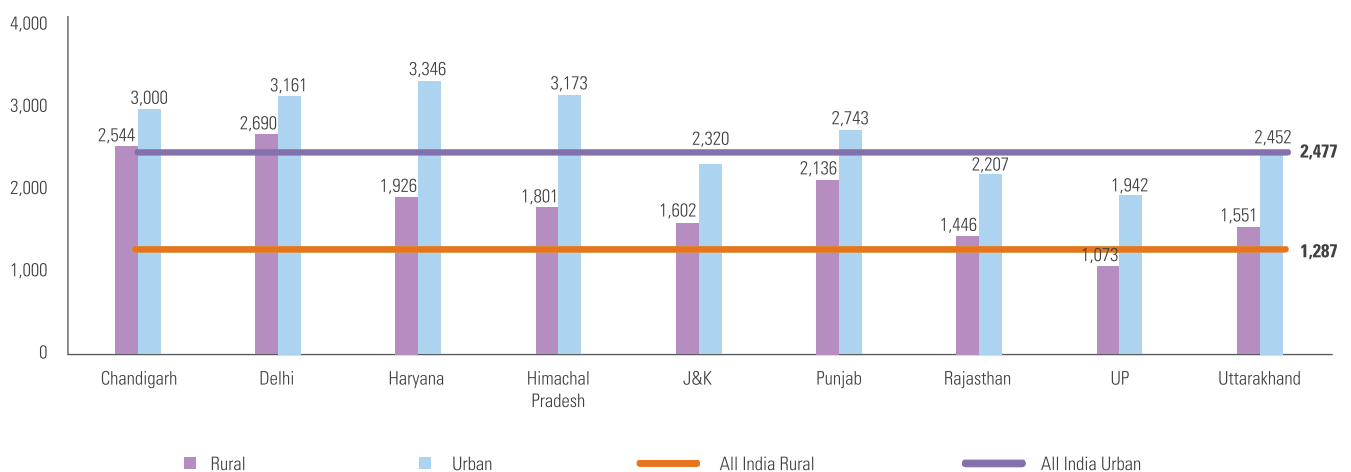
## Rising consumer demand and expenditure

With more than 30 percent of India's population residing in the northern region, and some of the high income states being part of this area, the potential for market development is high.

In terms of per-capita expenditure, seven northern states have a higher MPCE in rural regions as compared to the all India average of INR1,297. Also, six of the eight northern states, have higher MPCE in urban areas as compared to the all India average of INR2,477 as of June 2012.<sup>11</sup>



**Figure: State-wise average monthly per capita expenditure FY12 (MPCE) (INR)**



Source: NSSO

7. Central Electricity Authority (April 2014)

8. Latest available from the Ministry of Road Transport and Highways

9. Telecom Regulatory Authority of India

10. DMIC website accessed on 20 June 2014

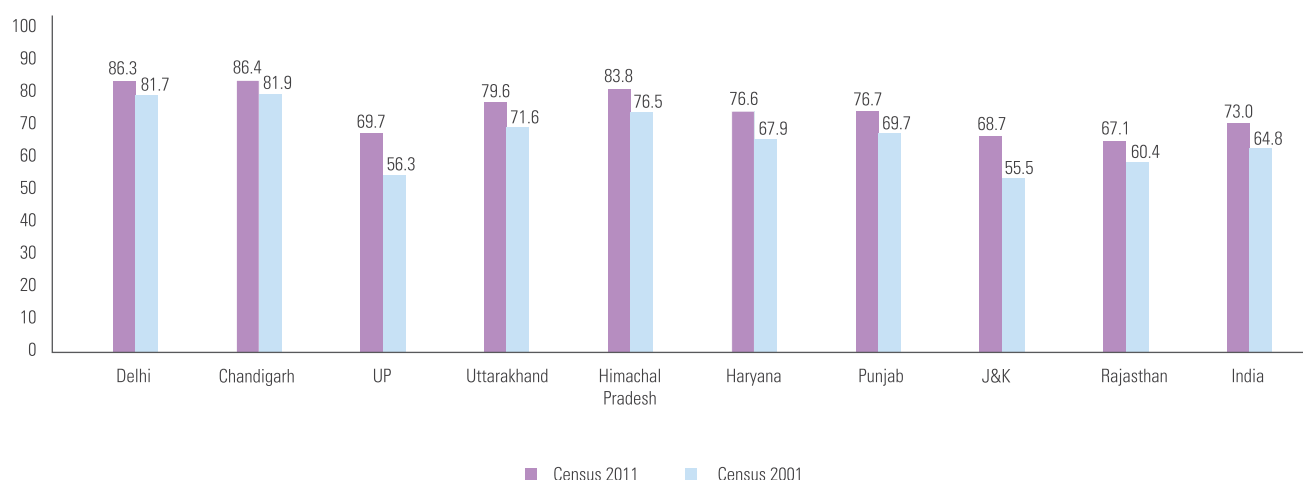
11. NSSO

## Educated and skilled workforce

With rising population and improving literacy rates, the region is poised to grow further. Of the nine states/UTs, six have a literacy rate higher than that of all-India average. Further, there are many in the northern region to cater to the demand for skilled labour.

The region has seven Indian Institutes of Technology (IITs), two Indian Institutes of Information Technology (IIITs), six National Institutes of Technology (NITs), four Indian Institutes of Management (IIM) and various other prestigious institutions in all fields such as medicine, engineering, commerce and management.

**Figure: State-wise literacy rates (percent)**



Source: Census 2011

## Government support

Governments — both at the centre and those of states — have been working towards improving investor climate. While, the Central Government has been relaxing FDI limits in different sectors, the state governments have announced new policies or made amendments in old policies to announce fiscal incentives and introduce other investor friendly measures.

The government support extends beyond policy measures and fiscal incentives. Almost all state governments have demarcated industrial areas/estates. The Government of Rajasthan has gone a step beyond and developed an international investment zone at Neemrana. In fact, it is the only state in India to have three international investment zones. Besides, single window clearance has been at the forefront of all state governments' agenda.



## 2. Northern states profile







## Socio-economic and demographic overview

Delhi is the national capital of India, popularly known for its heritage sites. Delhi has emerged as one of the leading cities in well-developed infrastructure. Though its economy is mainly driven by the service sector, the state also houses several industries and their manufacturing units. Delhi houses several heritage sites making it a good tourist destination.



### Geographical area

1,483 sq km



### Administrative districts (number)

11



### Gross state domestic product (at FY 05 prices)

US\$39.2 billion\* in FY 14, growing at a CAGR of 8.7 percent during FY 09-FY 14 \*\*



### Economic growth rate

9.3 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$2,117.9\* in FY 14, growing at a CAGR of 6.8 percent during FY 09-FY 14 \*\*



### Population

16.7 million



### Population density

11,297 per sq km



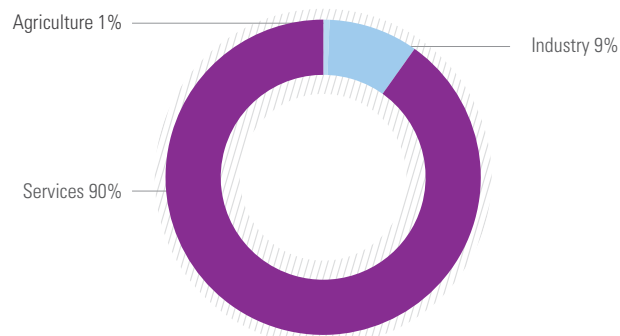
### Literacy rate

86.3 percent, according to Census 2011 (compared with 81.7 percent in 2001)

\*Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)  
\*\*The FY 14 numbers are provisional



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI



## Key sectors and investment

### Key sectors

Being a service-oriented economy, Delhi's services sector is dominated by trade and retail. Other major contributors to the state GDP include banking and insurance, construction, IT & ITeS, healthcare and hotels

### FDI

The state received cumulative FDI inflows of US\$ 43.05 billion during the period April 2000 to April 2014 (includes Delhi and parts of Haryana and Uttar Pradesh)

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**7,840.74 MW**



### Telecom<sup>2</sup>

Wireless subscriber base (as of April 2014)

**42.7 million**

Wireline subscriber base (as of April 2014)

**3.10 million**



### Airports

No. of airports (as of May 2014)

**One domestics and one International (Indira Gandhi)**

**Note:** 1 Includes allocated shares in joint and central sector utilities

2 Includes wireless subscribers from Delhi, Ghaziabad, Noida (in UP) and Gurgaon & Faridabad (in Haryana)



### Useful web links

#### Government of Delhi:

<http://delhi.gov.in/wps/wcm/connect/doit/Delhi+Govt/Delhi+Home>

#### Delhi State Industrial and Infrastructure Development Corporation

<http://dsiidc.org/cms/>



### Contact details

#### Delhi State Industrial and Infrastructure Development Corporation

N-Block, Bombay Life Building, Connaught Circus, New Delhi-110001, India  
Phone and Fax: +91-011-23314231-33/23351026  
Email: [support@dsiidc.org](mailto:support@dsiidc.org)

## Advantage Delhi

### National capital status

Being the national capital, Delhi enjoys a strategic position in terms of policy formation and is also an important trade centre

### Policy and fiscal incentives

Through the Industrial Policy 2010-2021 by the Government of Delhi, it offers attractive incentives to the businesses

### Industrial areas and corridors

The government has helped in developing specific areas as industrial areas. In addition, Delhi is also part of various dedicated industrial corridors, such as the Delhi-Mumbai Industrial corridor

### Infrastructure facilities

Delhi provides well developed physical and industrial infrastructure, which is being continuously improved. This can be gauged from its modern flyovers, metro links, sewerage pipes and better power situation

### Good workforce availability

A large pool of skilled and semi-skilled workforce acts as an added advantage

### Education infrastructure

Delhi is home to various higher education institutions like the University of Delhi, IIT Delhi, Jawaharlal Nehru University (JNU), AIIMS among others



## Growth supporting factors

- Despite limited availability of local resources, especially of land, Delhi has become an important centre of small scale industries including electronic, electrical, light engineering, plastic and textile
- Master Plan 2021 has identified a few high-tech and green industries, in addition to providing a housing unit for every Delhi citizen by 2021
- The strategies for the Industrial Policy for Delhi 2010-2021 include:
  - Infrastructure development through better O&M of industrial assets
  - Facilitating business by simplification and e-enabling measures
  - Support skill development and other promotional measures like allowing knowledge based industries in industrial area among others
  - Decongesting industrial areas through redevelopment schemes
  - Promoting cluster development of high-technology and skilled industries in new industrial areas through public-private partnerships
  - Discourage polluting industries through higher infrastructure development fee
- The state government has been focusing on industrial waste management and is in the process of identifying land and seeking clearance from Delhi Pollution Control Committee (DPCC) for disposal of industrial waste
- The proposed Delhi Skills Mission is likely to help facilitate the up-skilling of the existing workforce for the knowledge-based and high-technology industries
- A Business Facilitation Council (BFC) comprising members from industrial associations, Department of Industries, DSIIDC, DDA, MCD etc is functioning to facilitate entrepreneurs in obtaining clearances from various departments and agencies for setting up of industrial enterprises in NCT of Delhi. BFC is helping in resolving the problems of multiplicity of organizations to a great extent

## High priority sectors

- Knowledge based industries (KBI) including:
  - Software industry
  - IT service industry and ITeS industry (electronic design, engineering design and product development)
  - Media
  - Healthcare and Biotechnology
  - R&D and design
  - Business services (BFSI, legal services, accounting, taxation, architectural and engineering services, advertising services, equity research)
  - Educational services (technical diploma institutes, engineering and management institutes and any other professional or technical institute)
- Real estate and Construction
- Processed food
- Tourism

## The following projects have been/will be initiated and have opportunities for investment in related fields

### Development of Multi-level manufacturing hub at Mundka-Ranikhera:

- Estimated cost: INR30.98 billion
- Delhi State Industrial And Infrastructure Development Corporation (DSIIDC) acquired a land measuring 147 acres at Rani Khera on Rohtak road in Delhi
  - The area will have 610,000 sq meter under the built-up structure; 150,000 sq meter under the basement and 190,000 sq meter under the multi-storey parking
  - The land use of the project is for Manufacturing (Light and Service industry) and will cater to electronics component manufacturing, systems testing, IT hardware manufacturing, gems and jewellery manufacturing, semi-conductor manufacturing and bio-technology

### Development of Knowledge based industries park, Baprola

- Estimated cost: INR12 billion
- DSIIDC is developing KBI Park at Baprola in an area of approximately 72.37 acres
- Project will cater to specific needs of IT/ITeS industry, Media, R&D, Gems and jewellery and Business services

## Redevelopment of existing planned industrial areas

- Delhi has 29 planned industrial areas along with another 22 non confirming industrial clusters areas which have been notified for redevelopment
- **Redevelopment of existing planned industrial plots:** To incentivize redevelopment, 1.5 times the existing permissible FAR shall be permitted on an individual plot of minimum 1,000 sq m and above
- **Redevelopment of existing planned industrial sheds:** The development control norms of Master Plan Delhi 2021 as applicable on the individual plot shall also be allowed on an area allotted as an industrial shed
- **Redevelopment of existing planned industrial areas through sub-division of plots:** Master Plan Delhi 2021 also realizes that the existence of smaller plots by subdividing the larger plots and has recommended to prepare guidelines for regularization of such sub-divisions



Some relevant extracts from Master Plan Delhi 2021 related to the guidelines for redevelopment of existing planned industrial areas

Use premises	Maximum			Parking standard ECS/100 sq m of floor area	Activities performed	Definition
	Gr. Cov. (%)	FAR	Ht (m)			
Industrial plot (i) 50 sq m and below	100	200	8	2	Industrial units: unit retail sales outlet and administrative office upto maximum 10 percent of floor area on ground floor only; residential flat upto the maximum extent of five percent of the floor space or 50 sq m whichever is less for watch and ward and supervision, incidental storage related to the industrial activity, commercial activity as per footnote (vi)	A premise for industrial activity with non-hazardous, non-polluting performance
(ii) 51 sq m to 400 sq m	60	180	15	2		
(iii) 401 sq m and above	50	150	15	2		
Flatted group industry (minimum plot size: 400 sq m)	30	150	26	2	Industrial units: administrative office, watch and ward, maximum upto five percent of floor area or 20 sq m whichever is less, storage related to the manufacturing activity, commercial activity as per footnote (vi)	A premise having a group of small industrial units with common services and facilities of non-hazardous, non-polluting nature

## Redevelopment of Clusters of industrial concentration in non-conforming areas/unplanned industrial areas

- Delhi started with cluster approach in its industrial estates, with the land being allotted to ensure that units from particular sector would be located together
- Thus, the land was allotted in clusters for garments, electronics etc. However, over a period of time, Delhi has allowed mixed-trade use in the industrial estates
- Master Plan for Delhi 2021 visualizes redevelopment of areas which have become industrialised during the period of the previous two Master Plans, without being designated industrial areas
- The Delhi government has notified the following non-conforming clusters of industrial concentration having over 70 percent plots in the cluster with industrial activities for redevelopment:
  - Anand Parbat, Shahdara, Samaypur Badli, Jawahar Nagar, Sultanpur Mazra, Hastal Pocket-A, Naresh Park Extension, Libaspur, Peeragarhi village, Khayala, Hastal Pocket-D, Shalimar village, New Mandoli, Nawada, Rithala, Swarn Park Mundka, Haiderpur, Karawal Nagar, Dabri, Basai Dharapur
- The redevelopment process involves preparation of redevelopment plans for widening of roads, laying of services, development of open space and parking etc.

### Notes for the table:

- (i) In case of plots upto 60 sq m common parking shall be provided
- (ii) In case of plots of size 500 sq m and above, the utilities such as ESS, underground water storage tank, roof top water harvesting system, separate dry and wet dustbins, solar heating/lighting systems etc. shall be provided within the plot
- (iii) Identified service centres shall be planned as per plotted industrial area-norms
- (iv) Development of IT hardware and software permissible under industrial use
- (v) Banquet hall shall be permissible in industrial premises subject to specifications/regulations as may be prescribed, along with conversion charges as prescribed by the Government from time to time
- (vi) Industrial units/plots abutting roads of 24 m ROW and above shall be eligible for conversion to commercial use within the existing development control norms, subject to payment of conversion charges as prescribed by the Government from time to time, and cost of parking as decided by the Government from time to time. The activities permissible in community centres will be permitted in such plots. In addition, multilevel parking shall be permissible activity. However, this shall not be permitted on non-conforming/regularized industrial cluster. The above provision shall not affect the Supreme Court orders in any way

## Socio-economic and demographic overview

Haryana, being an industrially developed State, has a strong base in knowledge-industry including IT and biotechnology. Haryana shares its borders with Delhi, Himachal Pradesh, Punjab and Rajasthan. With almost half of the State falling under the National Capital Region (NCR), Haryana has been able to attract sizable investments. Additionally, the state has vast resources supporting its huge potential in the agri-based sectors.



### Geographical area

44,212 sq km



### Administrative districts (number)

21



### Gross state domestic product (at FY 05 prices)

US\$33.4 billion (INR2,010.77 billion)\* in FY 14 \*\*, growing at a CAGR of 8.1 percent during FY 09-FY 14 \*\*



### Economic growth rate

6.9 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$1,128.7 (INR68,040)\* in FY 14 \*\*, growing at a CAGR of 6.4 percent during FY 09-FY 14 \*\*



### Population

25.4 million



### Population density

573 per sq km



### Literacy rate

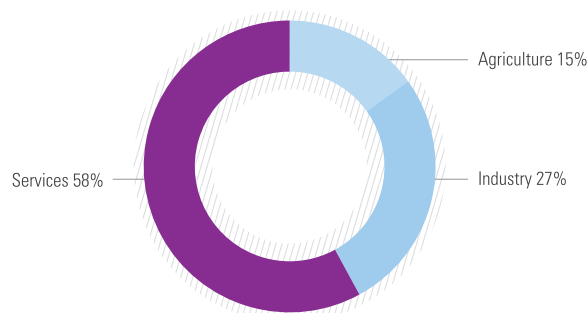
75.6 percent, according to Census 2011 (compared with 67.9 percent in 2001)

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

## Key sectors and investment

### Key sectors

Haryana offers good investment potential across a wide variety of sectors, ranging from food-processing, textiles, automotive to exports.

The state has emerged as a business-hub being one of the leading states in industrial production. It is home to several industries including mobile cranes, tractors, knowledge industry, IT and biotechnology

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**8,288.69 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**21.2 million**

Wireline subscriber base (as of April 2014)

**0.49 million**



### Airports

No. of airports (as of March 2014)

**Six airports including five civil aerodromes**

**Note:** 1 Includes allocated shares in joint and central sector utilities

## Advantage Haryana

### Lucrative investment opportunities

Haryana has emerged as a manufacturing hub for large and micro, small and medium enterprises

### Strategic locational advantage

Owing to good infrastructure and proximity to Delhi, several large Indian and multinational companies have set up their units and offices in Haryana

### Availability of skilled manpower

Skilled manpower availability makes it a feasible location for knowledge-based and manufacturing sectors. Haryana also has a vast pool of semi-skilled labour for support services & activities

### Favourable policy environment

Haryana provides a flexible, liberal, transparent and investor-friendly policy environment to promote private investments — both domestic and foreign, including the new Industrial policy 2011

### Infrastructure

The state provides well-developed infrastructure facilities in relation to road and rail network connected via Delhi; well-developed industrial estates; good banking facilities; reliable communication network; modern technical institutes and developed commercial markets



### Useful web links

#### Government of Haryana

<http://haryana.gov.in/>

#### Investment Promotion Center, Government of Haryana

[www.haryanainvest.org](http://www.haryanainvest.org)



### Contact details

#### Department of Industries & Commerce, Haryana

1st Floor, 30 Bays Building, Sector-17,  
Chandigarh, Haryana  
Phone: +91-0172-2701344, 2716296  
Email: [ipcharyana@yahoo.com](mailto:ipcharyana@yahoo.com)



## Growth supporting factors

- The Industrial and Investment Policy 2011 encourages manufacturing as the key enabler of economic growth in the state
- The policies in Haryana are investor friendly and aim to attract private sector investment through public-private partnerships
- The policies also aim to extend support to the small and medium enterprises in terms of quality, R&D investment and technology upgradation
- Single-window clearance mechanism in place
- Has key national level institutions such as IIM, FDDI, IICA, NIFT, NID and NIFT

## High priority sectors

- Agro-based, Food Processing and Allied Industry
- Automobile & Automotive Components
- Education & Skill Development
- Electronics, Information & Communication Technology
- Footwear and Accessories
- Handloom, Hosiery, Textile and Garments Manufacturing
- Health and Healthcare
- Pharmaceutical Industry
- Research & Development and Frontier Technologies
- Transport Network and Services
- Waste Processing and re-cycling Industry

## The following projects have been/will be initiated and have opportunities for investment in related fields

- Some of the specific projects include:
  - Delhi Mumbai Industrial Corridor (DMIC) project
  - Eco-City Project
  - Cargo Airport Project
  - Industrial Labour Housing
  - Flatted Factory Sheds
  - Development of new Industrial estates/IMTs/Infrastructure





No.	Sector	Description	Location
1	Infrastructure	<b>Delhi Mumbai Industrial Corridor (DMIC) project</b> : The DMIC Sub-Region in Haryana covers about 29,362 square kilometers area, which accounts for about 66.4 percent of the total area of the State	Manesar-Bawal, Faridabad-Palwal, Kundli-Sonepat, Rewari-Hisar investment Regions
2	Infrastructure	<b>Eco – City Project</b> : HSIIDC has signed MoU with consortium of Japanese companies comprising Toshiba, Tokyo Gas & NEC for building ‘Smart Communities’ or ‘Eco Cities’ in the Delhi Mumbai Industrial Corridor (DMIC) region; the country’s showpiece of futuristic developmental model	IMT Manesar for a pilot initiative
3	Infrastructure	<b>Cargo Airport Project</b> : A Greenfield Cargo Airport is proposed to be set-up in NCR	Bhaini Bhairon, Meham, Rohtak District
4	Industrial Infrastructure	<b>Industrial Labour Housing</b> : To cater to the housing requirements of the workers/units being set up in the Estates/IMTs, the Corporation has set-up housing units (Single Room Dwelling Units and Dormitory units) for industrial workers	IMT Manesar Kundli
5	Industrial Infrastructure	<b>Land acquired for development of industrial estates/infrastructure</b> : Nearly 27,000 acre land has been acquired for various development/ infrastructure projects of the Corporation during the last about nine years	Haryana
6	Industrial Infrastructure	<b>New Sector Specific Clusters/Parks</b> : New Clusters/Parks proposed/initiated: <ul style="list-style-type: none"> <li>• Electronics Manufacturing Cluster (108 acre)</li> <li>• Leather Cluster (105 acre)</li> <li>• Textile Park (88 acre)</li> <li>• Food Park (50-75 acre)</li> </ul>	<ul style="list-style-type: none"> <li>• IMT Rohtak</li> <li>• Rojka Meo (Mewat)</li> <li>• Panipat</li> <li>• Panipat</li> </ul>
7	Industrial Infrastructure	<b>Project development under Public Private Partnership (PPP)</b>	<b>IMT at Bidhal Lath</b> : Village Bidhal, Lath, Jouli and Bhainswal Kalan, Tehsil Gohana, District Sonapat.  <b>IMT at Kharkhoda</b> : Kharkhoda, District Sonipat

## Socio-economic and demographic overview

Himachal Pradesh is a mountainous state situated in the western Himalayas. The state is regarded as one of the high growing economies of the country. The economy of the state is highly dependent on agriculture, tourism, manufacturing, agro-processing, industrial, service sector and hydroelectric power.



### Geographical area

55,673 sq km



### Capital

Shimla



### Administrative districts (number)

12



### Gross state domestic product (at FY 05 prices)

US\$7.8 billion\* in FY 14 growing at a CAGR of 7.3 percent during FY 09-FY 14 \*\*



### Economic growth rate

6.2 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$904.1\* in FY 14, growing at a CAGR of 5.5 percent during FY 09-FY 14 \*\*



### Population

6.9 million



### Population density

123 per sq km



### Literacy rate

82.8 percent, according to Census 2011 (compared with 76.5 percent in 2001)



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional

## Key sectors and investment

### Key sectors

Agriculture and allied activities, tourism, manufacturing, hydroelectric power generation are major contributors to the state GDP

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**4,007.22 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**7.2 million**

Wireline subscriber base (as of April 2014)

**0.25 million**



### Airports

No. of airports (as of February 2014)

**Three domestic airports (Shimla, Kullu, Gaggal)**

**Note:** 1 Includes allocated shares in joint and central sector utilities

## Advantage Himachal Pradesh

### Availability of natural resources

The availability of rich natural resources are favorably suited for investment in sectors such as agriculture, agro-processing, hydroelectric power, pharmaceutical, cement and tourism

### Growing industrialization and urbanization

According to Department of Industries, Government of Himachal Pradesh, as on 31 March 2014, there are 40,145 industrial units registered with the Industries Department on permanent basis having the total investment of 17,700.95 crore and providing employment to 2,81,769 persons. Out of these 497 industrial units are Medium and Large scale units

### Policies and incentives

The government offers favorable policy and fiscal incentives to various sectors such as industrial, IT, tourism and Hydro to promote growth

### Strong base for hydropower

The state is endowed with a huge hydro power potential. 23,000 MW of hydropower potential has been identified

### High potential for the development of tourism and related activities

The state is a well established and well recognized tourist destination. There are plans to further develop and maintain its natural landscape, historical monuments and religious shrines to attract more tourists



### Useful web links

#### Government of Himachal Pradesh

<http://himachal.nic.in/welcome.asp>

#### Himachal Pradesh Department of Industries

<http://himachal.gov.in/industry/welcomelat.htm>



### Contact details

#### Department of Industries

Mr Rajender Singh, Director – Industries,  
Government of Himachal Pradesh  
Phone: +91-0177-2813414  
Email: [dirindus-hp@nic.in](mailto:dirindus-hp@nic.in)



## Growth supporting factors

- Himachal Pradesh has formulated a robust Hydro Power Policy to boost hydro power generation in the state
- High government spending on roads to boost economic activity
- Development of helipads, heli-taxi services, ropeways and integrated tourist places to support tourism
- Well educated and qualified human resource base available as literacy rate stands at 82.80 percent which is even better than the national average at 74.0 percent (as per 2011 census)
- Well equipped new industrial areas in Kangra, Una and Solan districts
- Availability of good quality limestone to support cement industry
- Single window clearance agency for speedy clearance and in-principle approvals for large and medium projects
- Tax incentives to IT sector and a proposed IT park in district Solan
- The state has a textile park for establishment of new textile units
- Policy support to pharma sector and development of biotechnology parks
- The state government has developed 41 industrial areas and 15 industrial estates for industries

## High priority sectors

- Urban mobility projects
- Sanitation and waste management
- Agriculture and Horticulture
- Hydro power
- Sericulture
- Tourism
- Road sector
- Pharmaceuticals
- Cement
- Biotechnology
- IT and Engineering

## The following projects have been/will be initiated and have opportunities for investment in related fields

- The urban mobility projects take precedence so as to promote tourism destination management
- Sanitation and waste management of a cluster of ULBs is also considered as an important project

### Tourism circuits in India

Three tourist circuits have been identified in the Himachal Pradesh including Circuit 1 (Chandigarh-Swarghat-Bilaspur-Mandi-Kullu-Manali-Manikaran-Naggar), Phase II of Circuit 1 (Kalka-Berog-Solan- Shimla-Chail-Kufri-Naldara with private sector opportunity of INR250 million) and Phase II of Circuit 2 (Kangra-Dharamshala-Palampur-Dalhousie-Chamba with private sector opportunity of INR500 million)

### State Data Centre (SDC)

- Department of Information Technology (DIT), Himachal Pradesh is building the SDC for the all government departments
- Selected agency to operate and maintain the project for five years under the PPP mode





## Socio-economic and demographic overview

Jammu & Kashmir (J&K), a popular tourist destination, is also known for its handicrafts. The State Government has been continually working towards encouraging various sectors, such as Hydel Power, Horticulture and IT/ITeS. The services sector has been the key growth driver



### Geographical area

222,236 sq km



### Capital

Srinagar (Summer capital: May – October),  
Jammu (Winter capital: November- April)



### Administrative districts (number)

22



### Gross state domestic product (at FY 05 prices)

US\$7.5 billion\* in FY 14, growing at a CAGR of 5.5 percent during FY 09-FY 14 \*\*



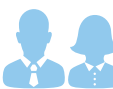
### Economic growth rate

5.9 percent in FY 14\*\*



### Per capita net state domestic product (at FY 05 prices)

US\$527.09\* in FY 14, growing at a CAGR of 4.4 percent during FY 09-FY 14 \*\*



### Population

12.5 million



### Population density

124 per sq km

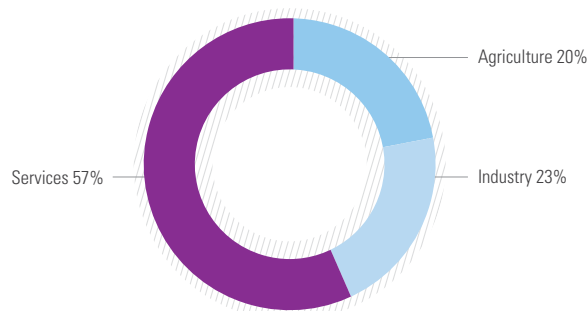


### Literacy rate

68.7 percent, according to Census 2011 (compared with 55.52 percent in 2001)



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional

## Key sectors and investment

### Key sectors

Floriculture and horticulture, agro based industry tourism, handicraft and service sector are major contributors to the state GDP

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**2,587.71 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**8.1 million**

Wireline subscriber base (as of April 2014)

**0.19 million**



### Airports

No. of airports (as of February 2014)

**Two domestic and one international airport**

**Note:** Note: 1 Includes allocated shares in joint and central sector utilities

## Advantage Jammu & Kashmir

### Tourist destination

Also known as the "Paradise on Earth", the temples in Jammu, the scenic beauty of Kashmir valley and the adventurous activities available in Leh and Ladakh attract millions of tourists annually. The state government has established 19 tourism development authorities to attract tourists

### Floriculture and horticulture

The state's agro-climatic conditions are best suited for horticulture and floriculture. In addition, the state has rich resources of water, agricultural lands, forests and herbs which sets the base for a robust growth of this sector

### Conducive business environment

Lower cost of setting up operations along with an industrial policy offering incentives through a single-window clearance mechanism. The electricity rates in the state are also reportedly lower as compared to the other states; the average electricity rate for commercial consumers lies between US\$0.05-0.06 and for the industrial consumers lies between US\$0.05-0.086

### Availability of skilled labor

The state has a rich base of skilled weavers and designers of handicraft products. This provides a basis for setting up more units based on traditional art of handicraft

### Strong growth opportunities for hydro-power

The estimated hydro power potential of the state is 20,000 MW, of which about 16,480 MW has been identified. The state government aims at adding another 6,000 MW of hydro capacity by 2018



### Useful web links

#### Government of Jammu and Kashmir

<http://jammukashmir.nic.in/>

#### Jammu and Kashmir State Industrial Development Corporation

<http://www.jksidco.org>



### Contact details

#### Jammu and Kashmir State Industrial Development Corporation

M Drabu House, Rambagh  
Srinagar-190015, J&K, India  
Phone: +91-194-2430036, 2434402,  
Fax: +91-194-2430036

## Growth supporting factors

- Reportedly lower power tariff for industrial consumers as compared to the other Indian states
- Formation of Jammu & Kashmir Handicrafts Sales and Export Promotion Corporation and Jammu and Kashmir State Handloom Development Corporation to promote development and growth of the handicraft sector
- Single window clearance policy for industrial units along with land allocation on lease for 90 years at concessional rates
- Development of ropeways, aero ballooning and cable car to support adventure tourism
- The Department of Industrial Policy & Promotion (DIPP) extended a special incentive package to the state. This includes 100 percent premium reimbursement under Central Comprehensive Insurance Subsidy Scheme to all units on expansion over the next five years
- The state government also provides income tax and excise exemption
- INR50 crore provided in the Union Budget 2014-15 to start a Pashmina Promotion Programme and development of other crafts

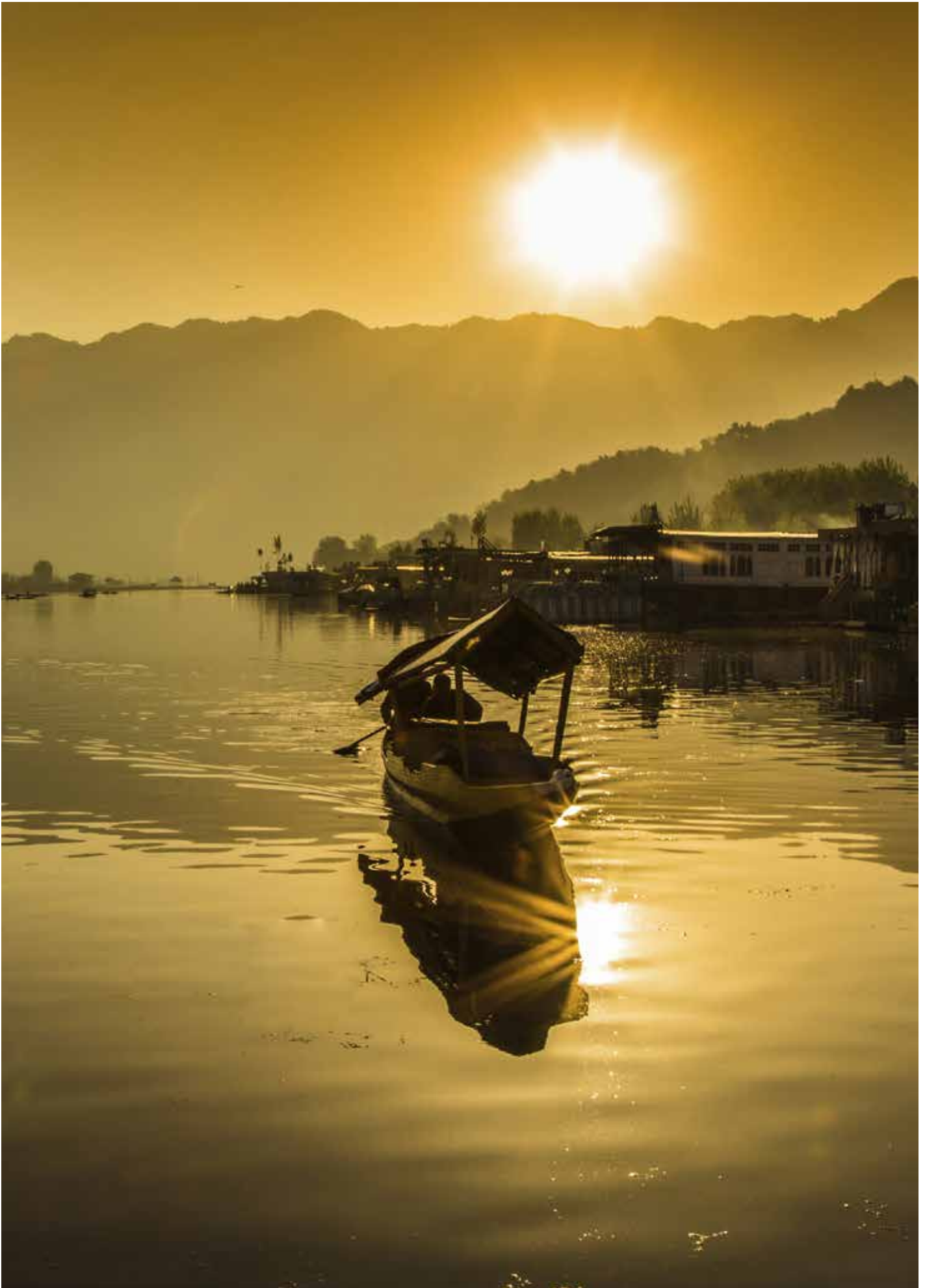
## High priority sectors

- Eco-tourism
- Hydro Power
- Handicrafts
- Food processing and agro based industries
- Leather processing and leather goods
- Tissue culture
- Silk reeling yarn and yarn spun from silk waste
- Wool and woven fabrics of wool
- Woven fabrics of cotton
- Medicinal herbs processing
- Computer hardware/electronics (integrated circuits and micro assemblies)
- Sports goods
- Auto ancillaries and Precision engineering
- Exploration of minerals
- Horticulture and Floriculture

## The following projects have been/will be initiated and have opportunities for investment in related fields

- J&K is working towards diversifying the definition of tourism to include amusement parks, adventure sports, resort development, township, yoga centers and conversion of hot springs into spas
- Opportunities in hydro and solar power
- Investment opportunities in organic farming of walnuts and almonds because of favorable climate
- Apiculture (honey production), micro irrigation, activities, such as manufacturing of perfumes and essence and strawberry production
- Development of higher educational institutes offer good investment opportunity





## Socio-economic and demographic overview

Punjab was originally known to be an agrarian economy, however the manufacturing and service sectors have gradually increased their contribution over the years. The state shares its border with Jammu and Kashmir to the north, Himachal Pradesh to the northeast, Haryana to the south, Rajasthan to the southwest and Pakistan to the west



### Geographical area

50,362 sq km



### Capital

Chandigarh



### Administrative districts (number)

22



### Gross state domestic product (at FY 05 prices)

US\$28.7 billion\* in FY 14, growing at a CAGR of 5.8 percent during FY 09-FY 14 \*\*



### Economic growth rate

5.3 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$833.3\* in FY 14, growing at a CAGR of 4.1 percent during FY 09-FY 14 \*\*



### Population

27.7 million



### Population density

551 per sq km



### Literacy rate

75.84 percent, according to Census 2011 (compared with 69.65 percent in 2001)



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional

## Key sectors and investment

### Key sectors

Punjab offers good investment potential across a wide variety of sectors, including agribusiness (food processing, agriculture, chemicals and agri-machinery), metal and light engineering products, textiles, information technology, biosciences & healthcare, education, electronics, infrastructure, housing & renewable energy.

### Key hubs for opportunities:

- Amritsar: Textiles (Dyeing, printing, spinning, weaving and garments) and Agro processing
- Jalandhar: Tanneries & pipe fittings, handtools and sports industry
- Ludhiana: Cycles and cycle parts, auto components, engineering goods and textiles (Dyeing, spinning, hosiery, garments)
- Mohali: Healthcare and Biosciences, IT, electronics and hardware
- Bathinda: Textiles

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**8,389.14 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**31.3 million**

Wireline subscriber base (as of April 2014)

**1.21 million**



### Airports

No. of airports (as of February 2014)

**Two domestic airports (Chandigarh, Ludhiana) and one international airport (Amritsar)**

**Note:** Note: 1 Includes allocated shares in joint and central sector utilities

## Advantage Punjab

### Ease of doing business

- The Punjab Bureau of Investment Promotion (Invest Punjab) eliminates multiple points of contact and acts as a one-stop-center for all investors. It acts as an umbrella agency covering 9 regulatory departments under one roof
- The Government targets to ease regulatory compliances in the state through a hassle-free, paper-less clearance system which is online and time bound, self-attestation of documents and third party certification by authorized professionals

### Conducive environment for agro-based businesses

Punjab is one of the largest producer of commodities including wheat, sugarcane, corn and maize. Thus, Punjab is also known as the "food basket" of India. Punjab offers a strong base for setting up agro-based businesses in a wide range of activities related to horticulture, forestry, poultry and animal husbandry

### Well-educated and professional workforce

The literacy rate of the state improved from 69.65 percent in 2001 to 75.84 percent in 2011 (above the 2011 national average of 74.0 percent) and boasts of a highly skilled workforce from 101 engineering colleges, 181 polytechnics and 378 ITIs

### Supportive policy incentives

There are a variety of measures taken by the state government in terms of policy and fiscal incentives in Punjab. The state offers an attractive package of incentives under the Fiscal Incentives for Industrial Promotion 2013. Punjab also has policies providing sector-specific incentives including SEZ, food parks and IT sector

### Good intra-state and inter-state connectivity

All the major villages and towns within Punjab are well connected through roads or railways. Also, Punjab is served by two domestic airports in Chandigarh and Ludhiana and one international airport in Amritsar, providing an additional mode of transport near all its key industrial hubs



### Useful web links

#### Government of Punjab

<http://www.punjabgovt.gov.in>

#### Invest Punjab

[www.investpunjab.gov.in](http://www.investpunjab.gov.in)

#### Department of Industries:

<http://www.pbindustries.gov.in>



### Contact details

#### Invest Punjab

6th floor, Udyog Bhawan, 18, Himalaya Marg,  
Sector – 17, Chandigarh, India  
Phone: +91-172 5256494, 5256495  
Email: [info@investpunjab.gov.in](mailto:info@investpunjab.gov.in)  
[www.investpunjab.gov.in](http://www.investpunjab.gov.in)

## Growth supporting factors

### Supporting infrastructure

- Current installed capacity of 8,389.14 MW
- One international and two operational domestic airports
- Among the highest road densities in India (133 km/ sq km) with rail network of 2,126 km
- Logistics support: 6 Container Freight Stations and 3 Inland Container Depots
- Land earmarked in major cities for industrial development
- Fourth-highest tele-density in India

### Talent availability

- Punjab is home to 101 engineering colleges, 181 polytechnics and 378 Industrial Training Institutes
- Presence of some of India's premier institutes such as Indian Institute of Technology, Indian School of Business, Punjab Technical University, Punjab Agriculture University, Indian Institute of Science Education and Research (IISER), National Institute of Technology and Thapar University

### Social infrastructure

- Three-tiered public healthcare system with 2,107 medical institutions and 99 hospitals
- Presence of big names in healthcare such as Fortis, Max, Ranbaxy and Apollo
- Opportunities in healthcare through development of Medicity

### Fiscal Incentives for Industrial Promotion 2013

- Benefits on VAT, CST, Stamp Duty, Electricity Duty & Property Tax
- Exemptions from regulatory checks to certain industries

### Punjab Bureau of Investment Promotion (Invest Punjab)

- One-stop-center for all investors: Umbrella agency covering 9 regulatory departments under one roof
- Single point of contact for grant of all fiscal incentives

### Regulatory reforms

- Hassle-free, paper-less clearance system which is online and time bound, self-attestation of documents and third party certification by authorized professionals

## High priority sectors

- Education
- Electronics Hardware
- Information Technology
- Food Processing/ Agriculture
- Textiles (Garmenting)
- Biosciences & Healthcare
- Infrastructure

## The following projects have been/will be initiated and have opportunities for investment in related fields

### HMEL- Guru Gobind Singh Refinery

- 5th biggest refinery in India
- Largest Foreign Direct Investment (FDI) in the Oil Refining Sector in India

### ITC Food Park, Kapurthala

- Generating employment for approx. 2000 people
- 62 acres of land
- Investment of approx. 700 Cr. INR

### Infosys campus, Mohali

- Setting up of IT/ITES special economic zone
- 50 acres of land
- Investment of approx. 500 Cr. INR





No.	Sector	Description	Location
1	Infrastructure/IT	IT City	Mohali
2	Infrastructure/ Health	Medicity	New Chandigarh
3	Infrastructure/ Education	Education City	New Chandigarh
4	Infrastructure/ Urban Development	Mohali Downtown	Mohali
5	Infrastructure/ Urban Development	Exhibition & Convention Center	Mohali
6	Infrastructure/ Urban Development	Bus Rapid Transit Systems	Amritsar and Ludhiana
7	Infrastructure/ Urban Development	Ludhiana Downtown	Ludhiana
8	Infrastructure/ Urban Development	Tourism destination	Ludhiana
9	Infrastructure/ Urban Development	Integrated Township/ Industrial Park (Near Sahnewal airport)	Ludhiana
10	Infrastructure/ Urban Development	Waterfront City	Ludhiana
11	Infrastructure/ Logistics	Dry Port	Amritsar
12	Infrastructure/ Urban Development	New City Center	Amritsar
13	Infrastructure	EPC Opportunities	-
14	Renewable Energy	Bio mass projects	-
15	Infrastructure/Transport	BOT Road Projects	-

**Source:** Punjab government, Population Census 2011, Department of Industrial Policy and Promotion (DIPP), Central Electricity Authority, Telecom Regulatory Authority of India, Ministry of Statistics and Programme Implementation (MOSPI), Oanda, Press articles, KPMG in India analysis

## Socio-economic and demographic overview

Rajasthan has a rich industrial base supported by its vast resource base, expanding infrastructure and government support. It is a popular destination for tourism. The State is developing as an ideal destination for investment in varied sectors



### Geographical area

342,239 sq km



### Capital

Jaipur



### Administrative districts (number)

33



### Gross state domestic product (at current prices)

INR5136.88 billion in the year 2013-14\* showing an increase of 11.86 percent over the previous year



### Per capita net state domestic product (at current prices)

INR421.64 billion in the year 2013-14\* showing an increase of 14.6 percent over the previous year



### Population

68.6 million



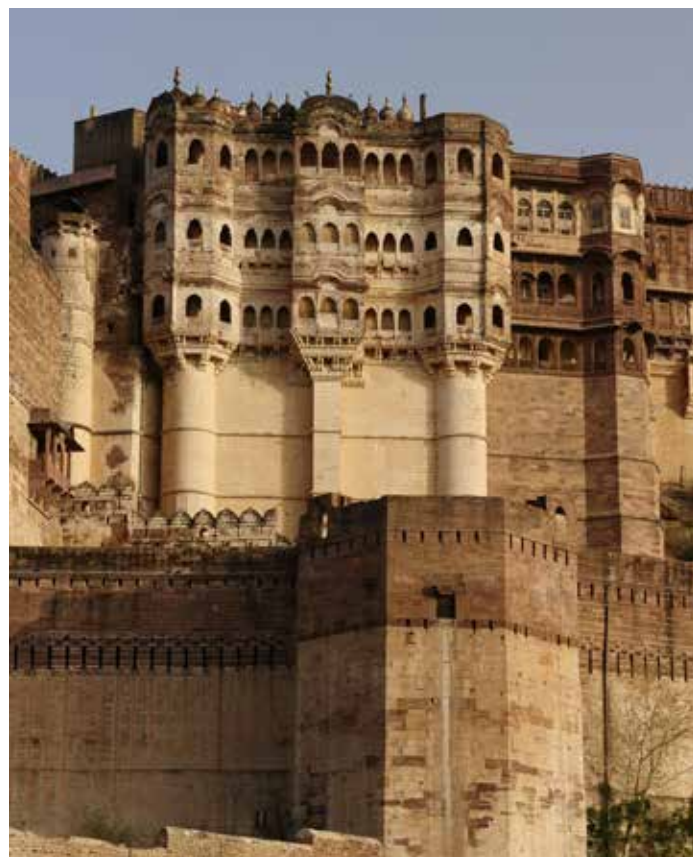
### Population density

200 per sq km

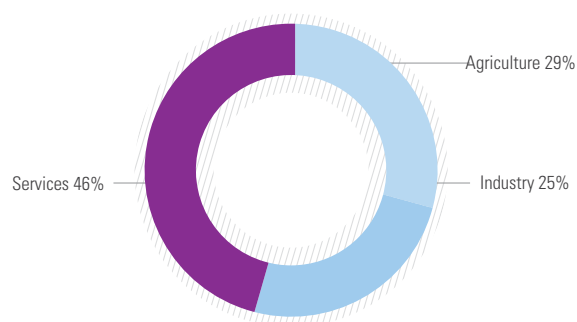


### Literacy rate

67.06 percent, according to Census 2011 (compared with 60.4 percent in 2001)



**Sector-wise composition of GSDP FY14 (advance estimates at current prices)**



\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional

## Key sectors and investment

### Key sectors

Ceramic and Glass, Auto & Auto Ancillaries, Solar Energy/ Manufacturing, IT/ITeS, Agro processing, Textiles, Tourism, Education and Health Services

### FDI

The state received cumulative FDI equity inflows of US\$724 million during the period April 2000 to April 2014

## State of infrastructure



### Electricity

Installed power capacity (as on 30 June 2014)<sup>1</sup>

**15,175 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**52.9 million**

Wireline subscriber base (as of April 2014)

**0.92 million**



### Airports

No. of airports (as of March 2014)

**Six airports including one international airport in Jaipur and five domestic airports<sup>2</sup>**

**Note:** Note: 1 Includes allocated shares in joint and central sector utilities  
2 Domestic airports in Jaisalmer, Jodhpur, Udaipur, Bikaner and Kota

## Advantage Rajasthan

### Strategic location advantage

Rajasthan borders six major states of India becoming a naturally important trade and commerce corridor between all these prosperous states

### Abundance of natural resources

Rajasthan has a rich pool of resources including cement-grade, steel melting-shop grade limestone and various minerals including clay, granite, gypsum and marble

### Strong power infrastructure

Rajasthan is comfortably placed to meet its power requirements, providing a strong platform for industrial growth. The state government has also been focusing on driving production of clean energy sources, such as solar and biomass to meet the state's long-term sustainable energy requirement

### Abundant land availability

There is easy availability of land to meet the requirements of setting up of industries and other ventures. Developed industrial land available including SEZ, sector specific zones etc. The state has two country investment zones (existing Japanese zone and proposed Korean zone )

### Progressive policies

Rajasthan offers a favorable business environment supported by various sector-specific policies including biotechnology, IT/ITeS and tourism

### Supportive political environment

Rajasthan has a stable political environment and the state government has been committed towards creating a conducive environment for the growth of business in the state



### Useful web links

#### Government of Rajasthan

<http://www.rajasthan.gov.in>

#### Rajasthan State Industrial Development & Investment

<http://www.riico.co.in>



### Contact details

#### Bureau of Investment Promotion, Rajasthan

Udyog Bhawan, Tilak Marg,  
Jaipur, Rajasthan, India  
Phone: +91-141-5113200  
Email: [chairman@riico.co.in](mailto:chairman@riico.co.in)



## Growth supporting factors

- Statutory mechanism (single-window clearance system) for accelerated & time-bound grant of approvals & licenses
- Conducive policy frame work which includes sector specific policies to cater special needs of individual priority sectors
- Excellent physical and industrial infrastructure
- Vast pool of trained human capital
- Untapped potential in many sectors

## High priority sectors

- Auto and auto components
- Glass and ceramic
- Cement
- Textiles
- Mining and minerals
- Tourism
- IT/ITeS
- Agro-based businesses
- Solar power
- Oil, gas and petrochemicals
- Handicraft
- Gems and jewellery
- Defense
- Public Private Partnership Projects

**Source:** Economic Survey of Rajasthan 2013-14, Official web portal of Government of Rajasthan accessed on 12 June 2014, Government of Rajasthan, Rajasthan Tourism Annual Report 2012-13, Population Census 2011, Department of Industrial Policy and Promotion (DIPP), Central Electricity Authority, Telecom Regulatory Authority of India, Ministry of Statistics and Programme Implementation (MOSPI), Oanda, Press articles, KPMG in India analysis

## Critical projects

### Delhi Mumbai Industrial Corridor

- A Model Industrial Corridor of international standard being developed as 'Global Manufacturing and Trading Hub'
- Being developed along Dedicated Freight Corridor which will connect Delhi to Mumbai
- 39 percent of total length passes through Rajasthan
- 60 percent of State area (22 districts) and 80 percent of State population falls in DMIC Project Influence Area
- First Node: Khushkheda –Bhiwadi -Neemarana Region (165 sq. kms)

## Industrial areas

- New Japanese Investment Zone of around 500 acres coming up in Ghiloth
- Ghiloth Industrial Area would also be housing Zones for Ceramic & Glass, Solar Equipment Manufacturing and general industries
- An exclusive Auto & Engineering zone developed in the Pathredi Industrial area in Bhiwadi
- Other Industrial areas are planned

## Urban infrastructure

- Projects being pursued include: Waste Water Treatment, Ropeways, Street Furniture, ASCO Lighting System, Affordable Housing

## Opportunities on the Anvil

- Renewable Energy specially Solar, Auto & Auto Ancillaries, Ceramic & Glass, Textiles, Medical & Health, Urban Infrastructure Including logistics & Transport, Upcoming Smart Cities in DMIC, Aviation, Defense







## Socio-economic and demographic overview

Uttar Pradesh (UP) is home to the largest consumer base, of over 200 million people (around 16.5 percent) in India, being the most populous state of India. The state is emerging as one of the biggest markets for industries owing to its gradually increasing per capita income



### Geographical area

240,928 sq km



### Capital

Lucknow



### Administrative districts (number)

71



### Gross state domestic product (at FY 05 prices)

US\$77.7 billion\* in FY 14 \*\*, growing at a CAGR of 6.3 percent during FY 09-FY 14 \*\*



### Economic growth rate

5.2 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$323.7\* in FY 14 \*\*, growing at a CAGR of 4.4 percent during FY 09-FY 14 \*\*



### Population

199.8 million



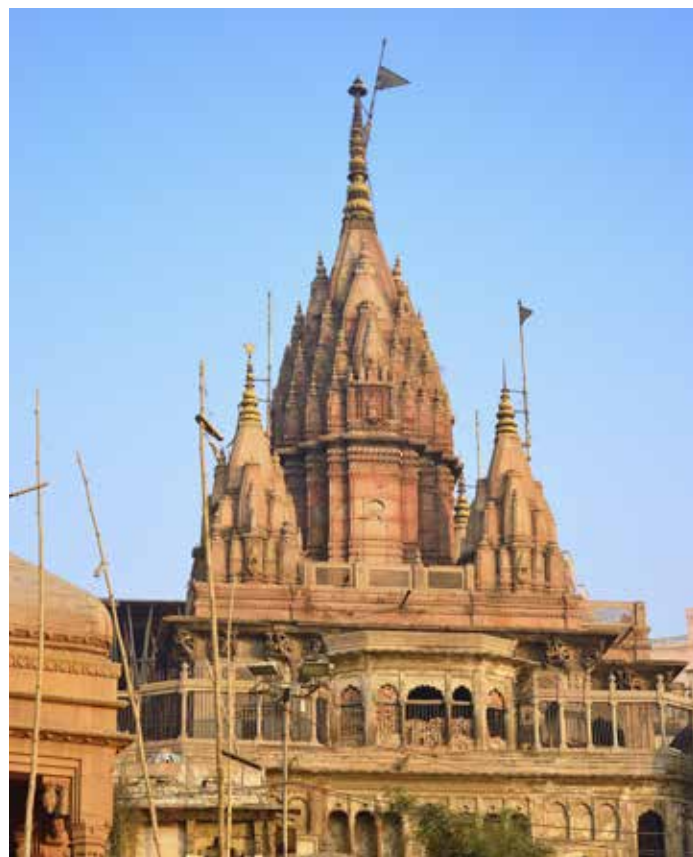
### Population density

829 per sq km

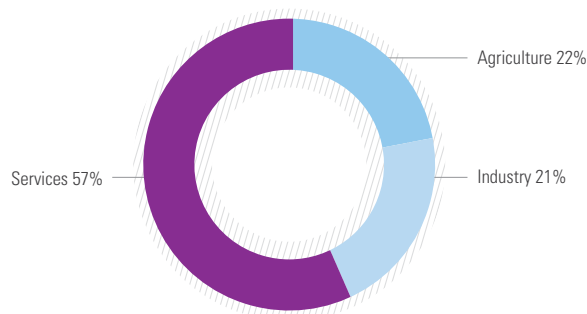


### Literacy rate

67.7 percent, according to Census 2011 (compared with 56.3 percent in 2001)



Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional



## Key sectors and investment

### Key sectors

Mainly driven by the services sector. Trade, hotels, real estate, IT & ITeS, food processing, transport, storage and communications are the major sectors driving growth, within the services sector

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**14,401.52 MW**



### Telecom

Wireless subscriber base (as of April 2014)

**126.8 million**

Wireline subscriber base (as of April 2014)

**1.32 million**



### Airports

No. of airports (as of March 2014)

**Six airports including two international airports in Lucknow and Varanasi and four domestic airports<sup>2</sup>**

**Note:** 1 Includes allocated shares in joint and central sector utilities  
2 Domestic airports in Agra, Kanpur, Allahabad, Gorakhpur



### Useful web links

#### Government of Uttar Pradesh

<http://upgov.nic.in/>

#### Udyog Bandhu, Department of Infrastructure and Industrial Development:

<https://udyogbandhu.com/>

#### UP State Industrial Development Corporation

<http://www.upsidc.com/contact.htm>



### Contact details

#### Udyog Bandhu, Department of Infrastructure and Industrial Development

4th Floor, Shri Lal Bahadur Shastri Bhawan,  
Sarojini Naidu Marg, Lucknow-226001,  
Uttar Pradesh, India  
Phone: +91-0522-2238283/2239530  
Fax: +91-0522-2238255  
Email: [idc.up@nic.in](mailto:idc.up@nic.in)

## Advantage Uttar Pradesh

### Availability of workforce

Rich pool of skilled, semi-skilled and unskilled workforce makes it a perfect location for all kinds of businesses

### Well-developed infrastructure

Robust infrastructure provides good intra-state and inter-state connectivity through national highways, airports and rail links to all major cities

### Progressive government policies

The state government provides several incentives through its supportive policies including Solar power policy 2013, Infrastructure and Industrial Investment Policy 2012, IT Policy 2012 and Sugar Industry, Co-generation and Distillery Promotion Policy 2013

### Focal point for IT/ITeS services

UP has been emerging as a focal point for IT/ITeS services including software, electronics and business process outsourcing (BPO), with various prominent players of the industry opening their offices in UP



## Growth supporting factors

- Single largest consumer market of India
- Leading producer of food grains & vegetables, milk; 60 percent share of India's meat exports
- Large base for MSMEs – 175,000 MSME units set up during the 11th Five Year Plan
- Over 150 industrial areas/clusters
- Availability of surplus skilled/semi-skilled and traditionally skilled manpower – net exporter to other states in India
- The state government has been focused on providing a conducive business environment to the businesses, which is supported by the Infrastructure and Industrial Investment Policy 2012
- Through its various policies, the state government encourages public-private partnership for infrastructure development; permits for foreign direct investment in infrastructure development is also expected
- Expected to benefit the most from the Eastern dedicated freight corridor as almost 57 percent of the corridor lies in UP
- Higher education institutes including IIT Kanpur, IIM Lucknow, NIT Allahabad, Banaras Hindu University in Varanasi

## High priority sectors

- Eastern Dedicated Freight Corridor Project (EDFC), Delhi Mumbai Industrial Corridor (DMIC) & Amritsar Kolkata Industrial Corridor (AKIC)
- Expressways and State Highways
- Heritage Tourism
- IT Export
- Skill Development
- Power / Solar Energy
- Handicrafts & MSME Clusters
- Food Processing
- Housing & Urban Infrastructure

## The following projects have been/will be initiated and have opportunities for investment in related fields

### Lucknow Metro:

- Estimated cost: INR125 billion
- Length: 34 Kms (including 10 Km underground)
- First phase of 23 Km to be completed by 2016

### 322.10 km Agra Lucknow access controlled expressway (including link road)

- Estimated cost: INR95.5 billion (excluding land cost)





No.	Industrial park	Location	Area (in acres)
1	Plastic City	Auraiya	366
2	Mega Leather Cluster	Sandila	163
3	Mega Leather Cluster	Kanpur Dehat	178
4	Trans Ganga	Kanpur	1,151
5	Hi-tech Industrial Township	Chola, Bulandshehar	2,000
6	Mandhna-Bhaunti Integrated Township	NH-24, Kanpur	960
7	Greater Mathura Knowledge City	Agra-Delhi national highway near Kosi	453.4
8	National Investment and Manufacturing Zone	Jhansi and Auraiya	-
9	Food Park	Barabanki, Gorakhpur, Saharanpur	-
10	Mega Food Park	Jagdishpur	72
11	56 Special Economic Zones	Across U. P.	-
12	Tronica City	Ghaziabad	1,600
13	Export Promotion Industrial Park	Gautam Budh Nagar Agra	200 102
14	Leather Technology Park	Unnao	233
15	Agro Parks	Lucknow and Varanasi	180
16	Apparel and Textile Park	Apparel in Ghaziabad and Textile in Kanpur	-
17	Leather Park	Agra	283
18	Textile Park	Fatehpur	-
19	Convention Centre	-	-
20	Electronic Cluster Park	-	-
21	MSME Tool Room	-	-
22	Night Safari	-	-
23	DMIC – Hightech Township	-	-
24	DMIC – Multimodal Logistic	-	-

**Source:** State government of Uttar Pradesh, Official web portal of Government of Uttar Pradesh accessed on 13 June 2014, UP State Industrial Development Corporation website accessed on 13 June 2014, UP Tourism website accessed on 13 June 2014, Population Census 2011, Department of Industrial Policy and Promotion (DIPP), Central Electricity Authority, Telecom Regulatory Authority of India, Ministry of Statistics and Programme Implementation (MOSPI), Oanda, Press articles, KPMG in India analysis

## Socio-economic and demographic overview

Uttarakhand, situated in northern India, shares borders with Himachal Pradesh in the north, Nepal in the southeast, Uttar Pradesh in the south and Delhi and Haryana to the north-west. The state is one of the popular tourist destinations of the northern region



### Geographical area

53,483 sq km



### Capital

Dehradun



### Administrative districts (number)

13



### Gross state domestic product (at FY 05 prices)

US\$12.1 billion\* in FY 14 \*\*, growing at a CAGR of 11.2 percent during FY 09-FY 14 \*\*



### Economic growth rate

10.0 percent in FY 14 \*\*



### Per capita net state domestic product (at FY 05 prices)

US\$1,013.7\* in FY 14 \*\*, growing at a CAGR of 9.6 percent during FY 09-FY 14 \*\*



### Population

10.1 million



### Population density

189 per sq km

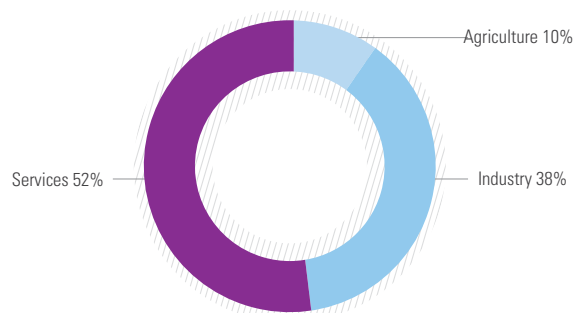


### Literacy rate

78.8 percent, according to Census 2011 (compared with 71.6 percent in 2001)



### Sector-wise composition of GSDP FY14 (provisional)



Source: MOSPI

\* Currency exchange US\$1 = INR60.2801 (average exchange rate for FY14)

\*\*The FY 14 numbers are provisional

## Key sectors and investment

### Key sectors

The state economy is driven by various sectors including manufacturing, services, pharmaceutical and biotechnology. The state is a popular tourist destination in the north. Its low to moderate temperature is suitable for agro and food processing, floriculture and horticulture based industries

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**2,640.03 MW**



### Airports

No. of airports (as of March 2014)

**One - Dehradun**

**Note:** 1 Includes allocated shares in joint and central sector utilities



## Advantage Uttarakhand

### Immense potential for tourism

The state has immense potential for tourism offering a vast array of options including mountains, leisure, spiritual, adventurous, religious, eco-traditional and high-end tourism places

### Presence of good higher education institutions

The state has some renowned higher education institutions including IIT Roorkee, IIM Kashipur and many renowned private institutions

### Rich mineral resources

Uttarakhand has rich deposits of various minerals including limestone, soapstone and magnesite

### Abundant natural resources

Located on the hills, the state has a wide variety of flora and fauna. The state has vast water resources which can help the state become an energy state. Only about 10 percent of the total hydropower potential of the state has been tapped till now

### Policy and fiscal incentives

Due to its keenness to promote investments in the state, the government has provided a host of incentives in the form of lower interest rates, tax exemptions, subsidies etc.

### Supportive political environment

Uttarakhand has a stable political environment and the state government has been committed towards creating a conducive environment for the growth of business in the state



### Useful web links

#### Government of Uttarakhand

<http://uk.gov.in/>

#### State Infrastructure and Industrial Development Corporation of Uttarakhand

<http://www.sidcul.com/>



### Contact details

#### State Infrastructure and Industrial Development Corporation of Uttarakhand

29, IIE (IT Park), Sahastradhara Road,  
Dehradun-248001, India  
Phone: +91-0135-2708100, 2607292  
Fax: +91-0135-2708109  
Email: [md@sidcul.com](mailto:md@sidcul.com)

## Growth supporting factors

- Due to its keenness to promote investments in the state, the government has provided a host of incentives under the special integrated industrial promotion policy 2008. Some of the incentives include exemption from stamp duty, rebate of up to 90 percent on value added tax, rebate on power tariffs and transport subsidy
- The state offers a favorable business environment supported by various sector-specific policies
- Uttarakhand offers excellent industrial infrastructure in the form of Integrated Industrial Estates (IIEs) at Haridwar, Pantnagar, Sitarganj – ESIP, Sitarganj – Phase II, Kashipur, Sahastradhara Road Dehradun, Kotdwar and Selaqui
- For the convenience of the entrepreneurs, Uttarakhand offers a single-window contract facility under a two-tier system through the District Industrial Centres (DIC) at the district-level and SIDCUL at the state-level
- Owing to the presence of renowned higher education institutions, Uttarakhand has a pool of well educated and qualified human resource base
- The capacity of skilled work force is further being improved upon by advancing the existing higher education institutions and developing new institutes
- Being located on the hills, Uttarakhand has a wide variety of agricultural and mineral resources
- The state has vast water resources which can help the state become an energy state. Only about 10 percent of the total hydropower potential of the state has been tapped till now
- Uttarakhand offers excellent connectivity through roads, railways and airports, making it a popular tourist destination

## High priority sectors

- Tourism
- Industry (including Engineering and allied industries and Fast moving consumer goods (FMCG) industry)
- Floriculture
- Horticulture
- Pharmaceuticals
- Biotechnology
- Food processing
- Agro-based businesses
- Information and communications technology (ICT)
- Hydel power

No.	Industrial park/ other projects	Location	Area (in acres)	Expected investment (in crore)	Additional comments
1	Mega Food Park	Sitarganj	50 - 75	-	SPV partner invited. Incentives for projects available as per GoI/State Government policies
2	Textile Park	Jaspur	75	-	SPV partner invited. Incentives for projects available as per GoI/State Government policies
3	Conventional Centre	Pantnagar	3	20	-
4	IIE Escort Farm	Kashipur	320	-	Knowledge based & non polluting industries invited
5	IIE Sitarganj	Sitarganj	1700	-	Manufacturing industries invited
6	Commercial Hubs/residential complex/hospitals/educational institutions	Sitarganj & Pantnagar	55 & 30, respectively	-	Private investors invited
7	Ropeway	Purukul to Mussoorie in Dehradun	10.93 Kms length	800	-
8	Ropeway	Barsu - Maithana - Barnala - Dyara in District Uttarkashi	3.84 Kms length	23.61	-
9	Ropeway	Snowview to Chidiyagha in Nainital	1.576 Kms	20	-
10	Ropeway	Nileshwar Parvat to Bhileshwar Parvat in District Bageshwar		-	-
11	Ropeway	Govind Ghat to Ghangariya to Hemkund Sahib in District Chamoli		-	-
12	Hydel power project on JV basis	Tamak Lata	250 MW	1,053	-



No.	Industrial park/ other projects	Location	Area (in acres)	Expected investment (in crore)	Additional comments
13	Hydel power project on JV basis	Bowla Nand Prayag	300 MW	2,222	-
14	Hydel power project on JV basis	Nand Prayag Langasu	100 MW	1,421	-
15	Hydel power project on BOOT basis	Utyasu Stage I to VI	745 MW	-	-
18	Hydel power project on BOOT basis	Ming - Nalagaon	114 MW	-	-
19	Hydel power project on BOOT basis	Garbyang	108 MW	-	-
20	Hydel power project on BOOT basis	Budhi	192 MW	-	-
21	Hydel power project on BOOT basis	Malipa	138 MW	-	-
22	Hydel power project on BOOT basis	Tawaghat Tapovan	105 MW	-	-
23	Hydel power project on BOOT basis	Tapovan Kalika	160 MW	-	-
24	Hydel power project on BOOT basis	Kalika Baluwakot	120 MW	-	-
25	Construction & Consultancy opportunity	Guptakashi	1.3 MW	-	-
26	Construction & Consultancy opportunity	Asiganga - III	9.0 MW	-	-
27	Construction & Consultancy opportunity	Chamoli	4.0 MW	-	-
28	Construction & Consultancy opportunity	Pilangad - II	4.0 MW	-	-
29	Construction & Consultancy opportunity	Sonegad	7.5 MW	-	-
30	Construction & Consultancy opportunity	Painagad	9.0 MW	-	-
31	Construction & Consultancy opportunity	Suringad -II	5.0 MW	-	-
32	Construction & Consultancy opportunity	Tankul	12.0MW	-	-
33	Construction & Consultancy opportunity	Urgam -II	10.0 MW	-	-
34	Construction & Consultancy opportunity	Bhilangana 2A	24.0 MW	-	-
35	Construction & Consultancy opportunity	Bhilangana 2B	21.0 MW	-	-
36	Construction & Consultancy opportunity	Bhilangana 2C	21.0 MW	-	-
37	Renovation, Modernisation & Upgradation	Dhakrani	33.75 MW	117	-
38	Renovation, Modernisation & Upgradation	Dhalipur	51.0 MW	117	-
39	Renovation, Modernisation & Upgradation	Khodri	120 MW	170	-
40	Renovation, Modernisation & Upgradation	Chibro	240 MW	185	-
41	Renovation, Modernisation & Upgradation	Tiloth	90 MW	127	-
42	Renovation, Modernisation & Upgradation	Ramganga	198 MW	351	-
43	Renovation, Modernisation & Upgradation	Chilla	144 MW	300	-

## Socio-economic and demographic overview

Chandigarh is the first planned city in India and continues to be one of the well managed cities in India. Chandigarh is a union territory (UT) and acts as a capital to both the states of Punjab and Haryana. The UT has one of the highest per capita income in the country



### Geographical area

114 sq km



### Gross state domestic product (at FY 05 prices)

US\$3.0 billion\* in FY 13, growing at a CAGR of 7.4 percent during FY 08-FY 13



### Economic growth rate

6.2 percent in FY 13



### Per capita net state domestic product (at FY 05 prices)

US\$1,771\* in FY 13, growing at a CAGR of 2.1 percent during FY 08-FY 13



### Population

1.1 million



### Population density

9,258 per sq km

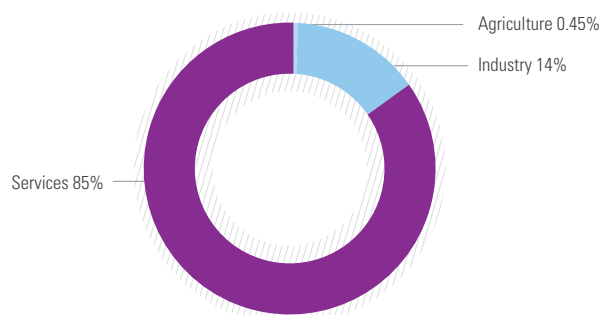


### Literacy rate

86.1 percent, according to Census 2011 (compared with 81.9 percent in 2001)



### Sector-wise composition of GSDP (FY13)



\* Currency exchange US\$1 = INR54.3228 (average exchange rate for FY13)

## Key sectors and investment

### Key sectors

Chandigarh offers diverse investment opportunities principally in the services sector which has the maximum contribution, of 85.01 percent, to its GDP (FY13). In addition to the services sector, consumer spending is considerable in automobiles and FMCG sectors

## State of infrastructure



### Electricity

Installed power capacity (as on 31 May 2014)<sup>1</sup>

**116.34 MW**



### Airports

No. of airports (as of March 2014)

**One airport**

**Note:** 1 Includes allocated shares in joint and central sector utilities

## Advantage Chandigarh

### Strategic location advantage

Having a close proximity to the country's capital, Delhi, many Indian and multinational companies have been setting up their offices in Chandigarh

### Conducive business environment

The Chandigarh Administration has been working towards creating an investor-friendly environment in Chandigarh. The UT has one of the highest per capita income becoming a good consumer market

### Well-developed infrastructure

Chandigarh is India's first planned city and has excellent infrastructure. The UT provides well-developed banking facilities, reliable communication network, modern technical institutes and developed commercial markets

### High potential for the development of tourism

Chandigarh has several tourist attractions including Sukhna lake, Rose garden, Rock garden. In addition, the UT offers cultural heritage and religious significance. The excellent connectivity through roads, railways and airport acts as an added advantage to promote tourism in Chandigarh

### Favourable policy environment

Chandigarh provides a flexible, liberal, transparent and investor-friendly policy environment to promote investments by domestic and foreign private players

## Growth supporting factors

- The Draft Chandigarh Industrial Policy 2009 plans to create sustainable industry and a pollution free industry based on promotional avenues for Micro Small & Medium Enterprises
- Chandigarh has also put in place the IT Vision 2010 for the development of IT/ITeS industry in the UT and IT-enabled infrastructure like e-Governance
- The UT offers a single window system to grant approval to all building plans relating to the industrial sector within 60 days of its submission.
- In case approval is not granted in 60 days by Estate Officer (EO), the plan would be deemed to have been approved and a completion certificate would be issued by EO without making any further reference to the applicant
- Modern city planning and well-developed infrastructure along with educated and qualified human resource base makes Chandigarh a lucrative destination for business
- The UT has a very strong higher education infrastructure, providing specialized courses through various institutes including Panjab University, PEC University of Technology, University Business School etc
- Chandigarh houses several tourist spots and has good access through rail, air and road to other states which makes it a good tourist destination
- The UT has excellent road infrastructure

## High priority sectors

- IT/ITeS
- Tourism and hospitality
- Small Manufacturing and light engineering
- Retail and franchise
- Banking and financial services
- Education
- Biotechnology and health
- Auto and auto components



### Useful web links

#### Government of Chandigarh

<http://chandigarh.gov.in/>



### Contact details

#### Department of Industries, Chandigarh

Ramdarbar, Phase-II, Chandigarh  
Phone: +91 172 2653140

**Source:** Official web portal of Government of Chandigarh accessed on 16 June 2014, Chandigarh Tourism website accessed on 16 June 2014, Chandigarh Industrial and Tourism Development Corporation (CITCO), Population Census 2011, Department of Industrial Policy and Promotion (DIPP), Central Electricity Authority, Telecom Regulatory Authority of India, Ministry of Statistics and Programme Implementation (MOSPI), Airport Authority of India, Qanda, Press articles, KPMG in India analysis

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## Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895, India's premier business association has over 7200 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 100,000 enterprises from around 242 national and regional sectoral industry bodies.

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The CII theme of 'Accelerating Growth, Creating Employment' for 2014-15 aims to strengthen a growth process that meets the aspirations of today's India. During the year, CII will specially focus on economic growth, education, skill development, manufacturing, investments, ease of doing business, export competitiveness, legal and regulatory architecture, labour law reforms and entrepreneurship as growth enablers.

With 64 offices, including 9 Centres of Excellence, in India, and 7 overseas offices in Australia, China, Egypt, France, Singapore, UK, and USA, as well as institutional partnerships with 312 counterpart organizations in 106 countries, CII serves as a reference point for Indian industry and the international business community.

### Confederation of Indian Industry

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