



Destination **India**

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The global environment is witnessing a rapid change

De-globalisation



**Rise and
Stagnation
of China**



**Subdued
Global Economic
Growth**



**Demographic
Dynamics**



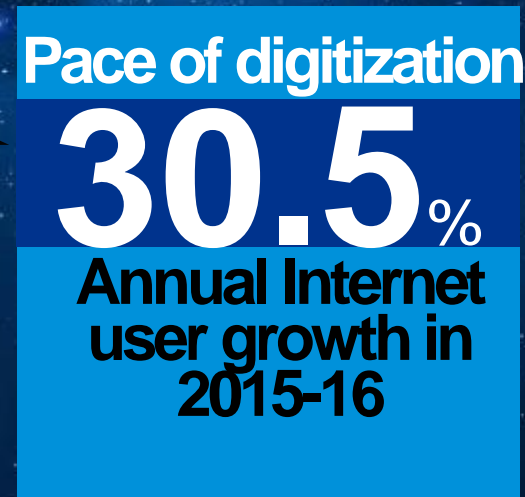
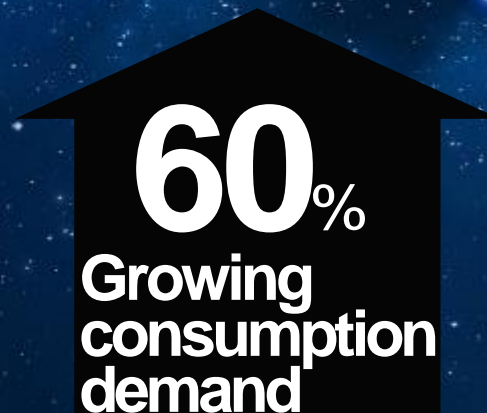
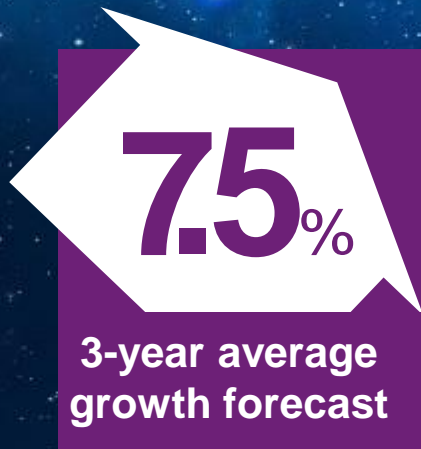
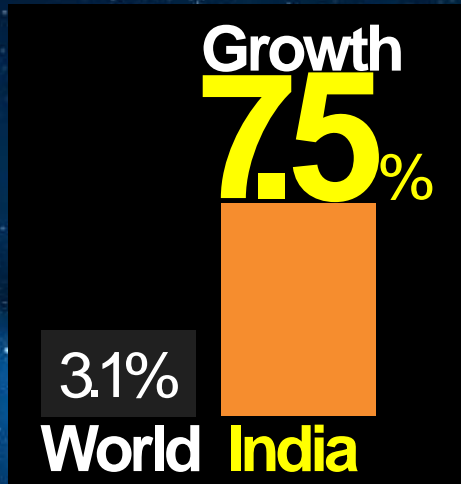
**Regulatory
Reforms**



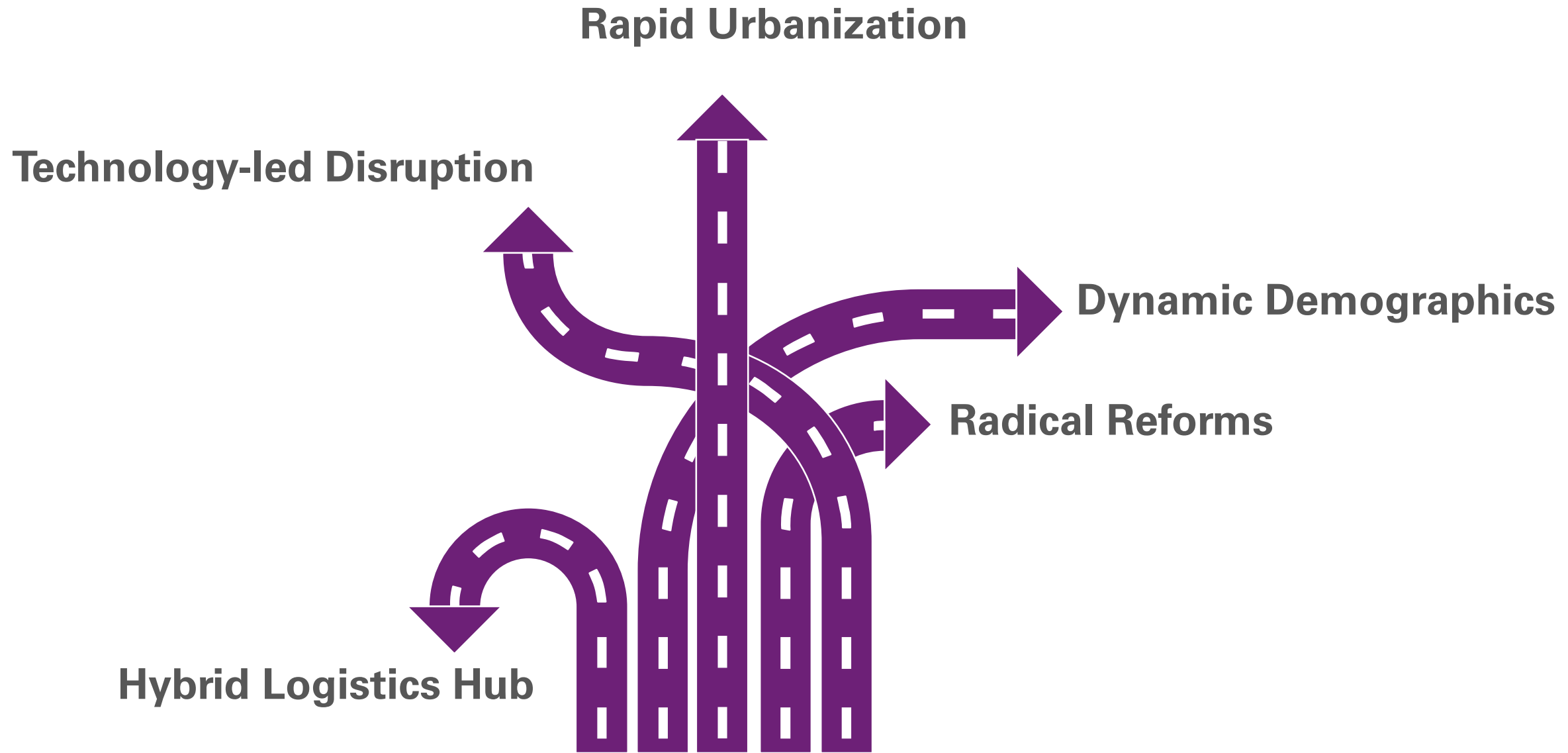
Industry 4.0



While the India opportunity is still real



The quantum leap from an INR2 to INR5 trillion economy will depend on the interplay of various factors



Young urban Indian consumers will drive domestic consumption

Growing population

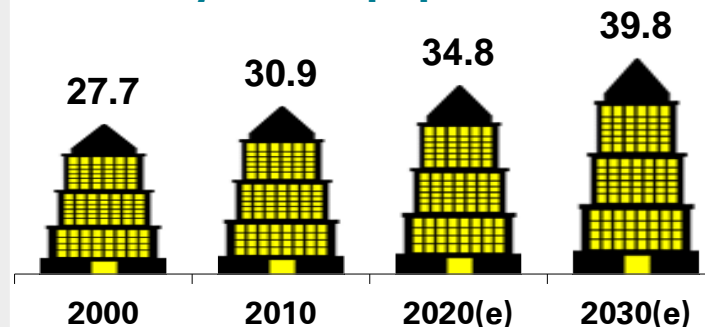


Population of over 1.29 billion, growing annually by 1.2%

#2 *Second largest and continually growing consumer base*

Increasing urbanization

Share of urban population in the country's total population (%)

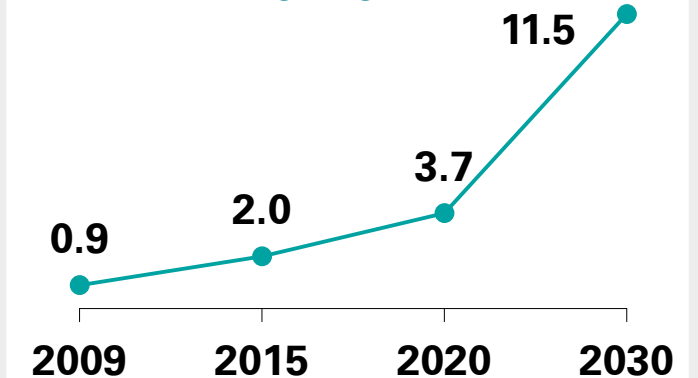


1200
basis points (bps) rise

Rising urbanization

Higher household income

Annual gross income – US\$ trillion



12.7X *Rise in gross annual income over 2009-2030*

Flagship programs and regulatory changes unlock opportunities for the global community



Make in India

Enhancing manufacturing through investments, innovation, and infrastructure



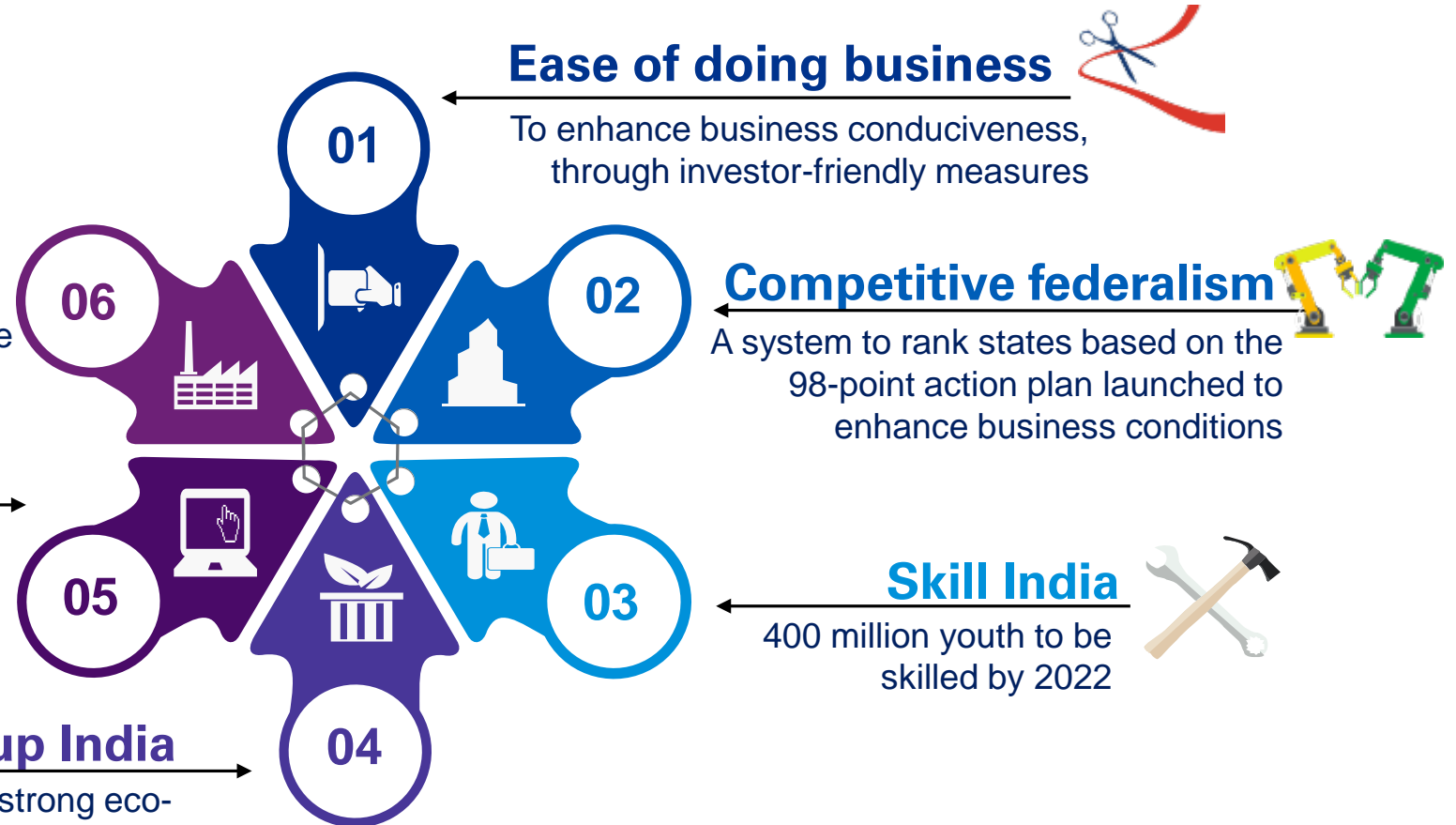
Digital India

Provides digital infrastructure and governance services to all citizens



Start-up India

To build a strong ecosystem for nurturing innovation and entrepreneurship



The technological revolution provides insights about the Indian consumer treasure chest

271 million bank accounts
with deposits worth ~USD10
billion



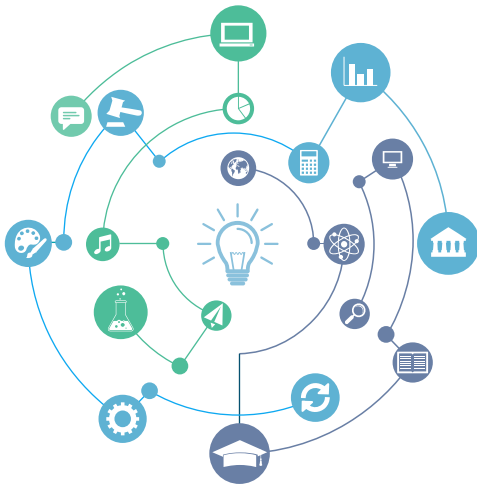
900+ million
mobile phone users



1 billion+
Aadhar (ID) registrations



INDIA'S CONNECTED FUTURE POTENTIAL



Digital Banking

Tier II and III boom

Last Mile Connectivity

e-Commerce Revolution

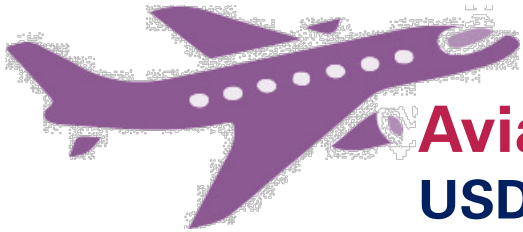
Internet of Things

Extreme Automation



Connectivity will drive growth and investments

India needs over **USD1.5 trillion** in investment in the next **10 years** to bridge infrastructure gap



Aviation

USD120 billion investment in development of airport infrastructure

India aims to be **third largest aviation market** by 2020



Railways

Target of **138,000 km** track length

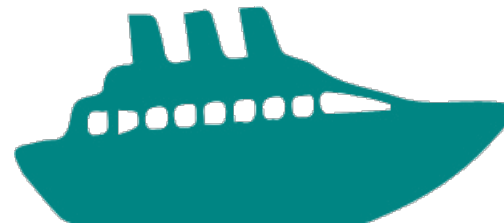
Annual freight capacity of **1.5 billion tonnes**



Roads and Highways

5 Industrial Corridors

Building **30km** road stretch per day



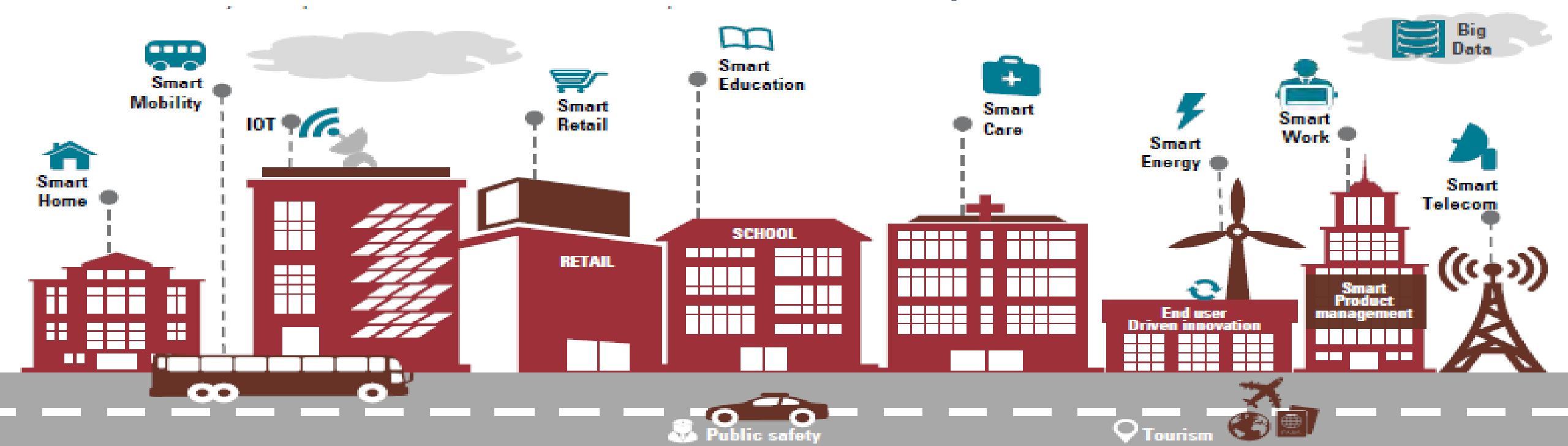
Coasts

12 major ports to be developed in Sagarmala

10 Coastal Economic Zones to be established

Urban India has a new paradigm encompassing modern, digital and sustainable living

Urban population expected to contribute **70%** to
India's GDP, in the next 15 years



Increase predictability and quality of service delivery

Address gap in infrastructure

Augment inclusivity of a city
Provide new and innovative technology solutions

Collectively propelling India to become the 3rd largest economy in the next decade...

583

Million urban
population



\$ 7.5

trillion contribution
of Urban GDP



77 cities,

population >1 Mn



23%

Global middle class
from India



\$ 10,073

Indian median income



\$850

Billion retail market



730

Million internet
subscribers



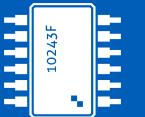
\$ 228

Billion e-commerce
Market



\$ 500

Billion Digital payments
market



*So the question is
not 'Why'
anymore....it is
'When' and 'How'*



Thank you