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Knowledge Partner



Communications Partner

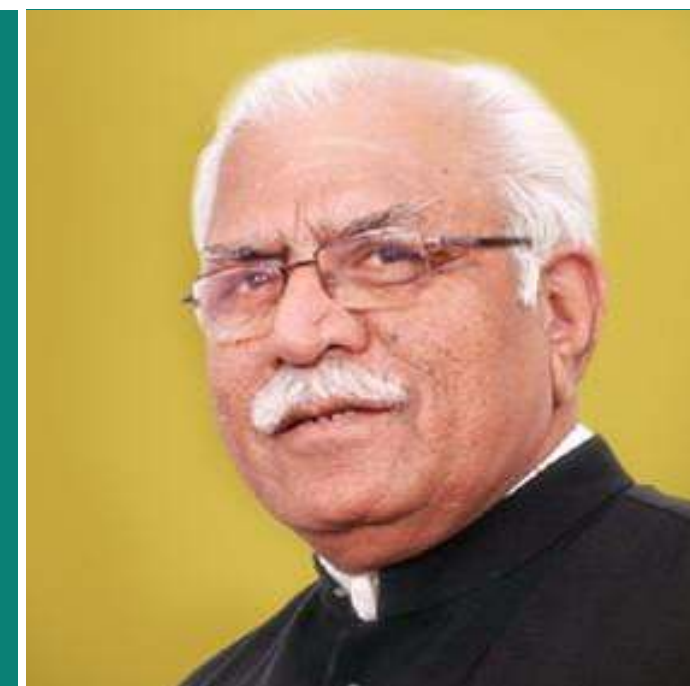




“Haryana provides a unique ecosystem of services and manufacturing industry with the capacity to serve regional, national & global needs through its massive urban-industrial setup & unparalleled connectivity”

Vision

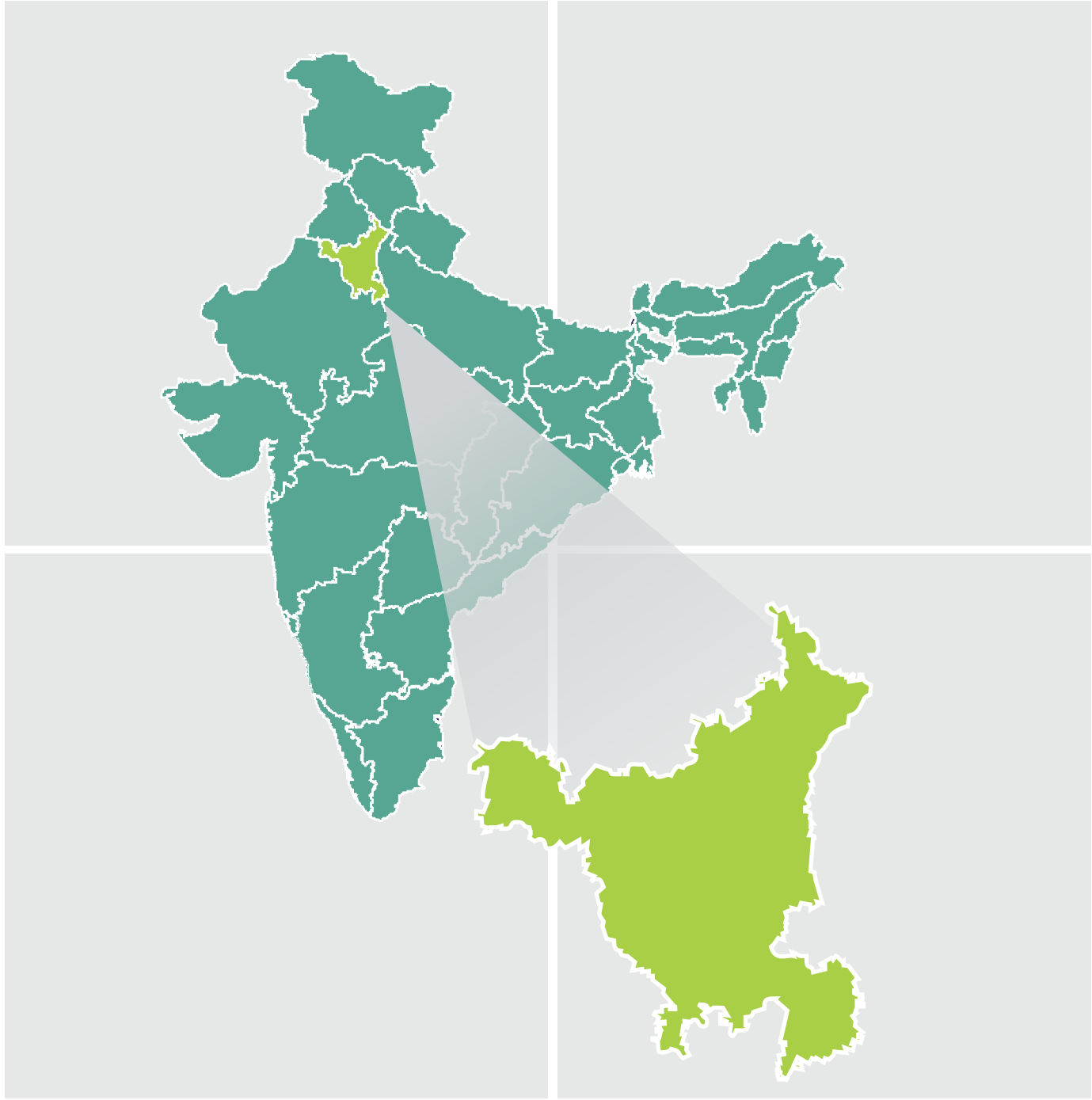
Shri Manohar Lal
Chief Minister
Haryana



Capt. Abhimanyu
Industries Minister
Haryana



- ❖ Haryana as a “Preferred Destination” in terms of Ease of Doing Business and Cost of Doing Business
- ❖ State GDP growth rate in excess of 8%
- ❖ Generate 400,000 jobs
- ❖ Attract investments of over US\$ 15 billion
- ❖ Increase contribution of secondary sector in the State GDP from 27% to 32%
- ❖ Balanced regional growth
- ❖ Increasing the competitiveness of MSMEs through cluster development
- ❖ Adoption of “Zero Defect Zero Effect” manufacturing practices



| | |
|-----------------|---|
| Location | Northern India |
| Area | 44,212 sq. kms |
| Capital City | Chandigarh |
| Languages | English, Hindi, Haryanvi, Punjabi |
| BorderStates/UT | Punjab, Himachal PradeshUttar Pradesh, Delhi, Rajasthan, Chandigarh |
| Biggest Cities | Gurgaon, FaridabadAmbala, Panchkula, Panipat |
| Energy | Installed capacity of 11,102 MW |
| Tele'density | 81 percent, 10 th highest in the country |
| Rail | Rail density of 33 km per 1000 sq. km. ranked 5 th best in the country. Rapid Metro Rail in Gurgaon. |
| Road | 25,825 km with a road density of 52.1 sq. km. per 100 sq. km. |
| Air | Domestic airport in Chandigarh-the capital city and Indira Gandhi International Airport at New Delhi is located 20 minutes away from Gurgaon. |



Why Haryana?

1



Producer of 50% of the passenger vehicles & 60% of motorcycles in India

Source: CMIE

1



Highest urban average spend across the country

Source: NSSO Survey

1



60% of Basmati Rice exports from the country

Source: Eco Survey Haryana

1



Highest per capita income in the country amongst major States

Source: CMIE

1



Highest concentration of BPO workforce in the world in Gurgaon – 5% of the world

Source: NASSCOM

2



Second largest contributor of to the National Pool

Source: CMIE

4



Fourth in the Infrastructure Index

Source: CMIE

2

Airports

Access to 2 International Airports New Delhi & Chandigarh

Source: AAI

2



Industrial Corridors

Entire State falls in the influence zone of industrial corridors: DMIC & AKIC

Source: GOI & DMICDC

13

Districts



13 districts part of prominent trade and consumption center

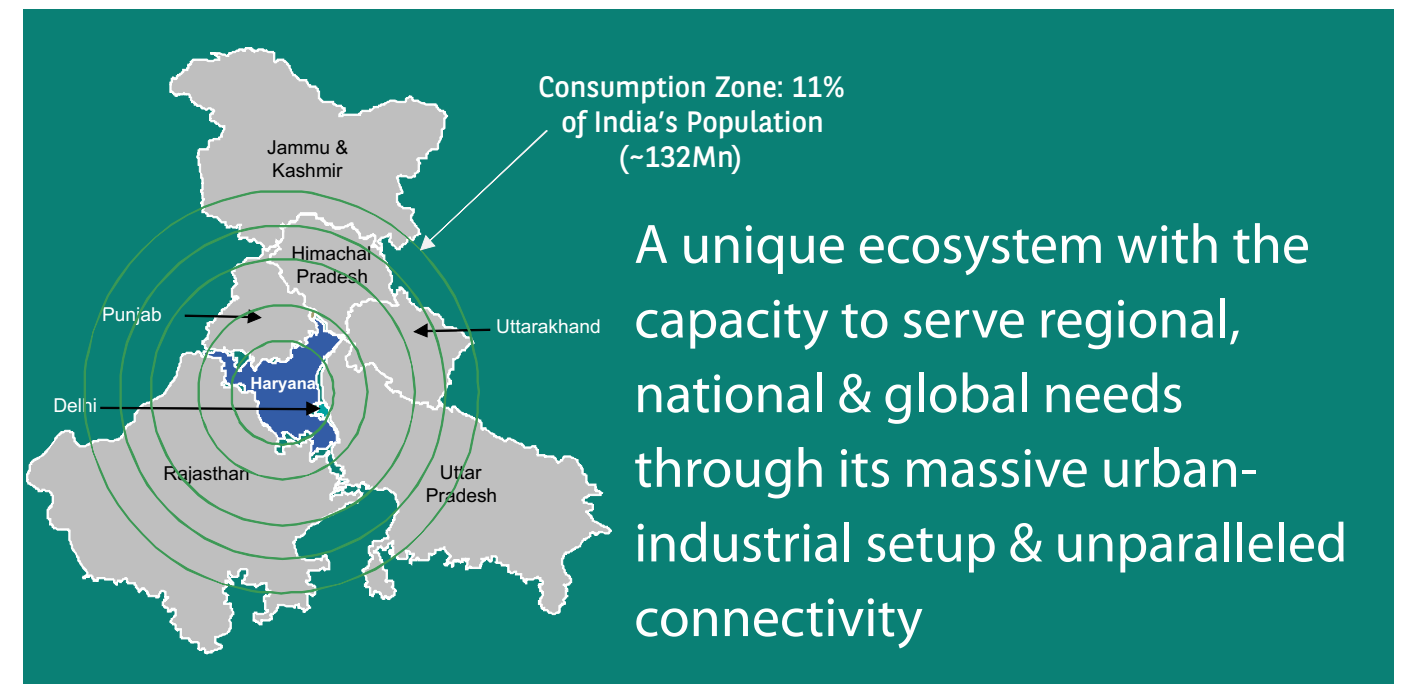
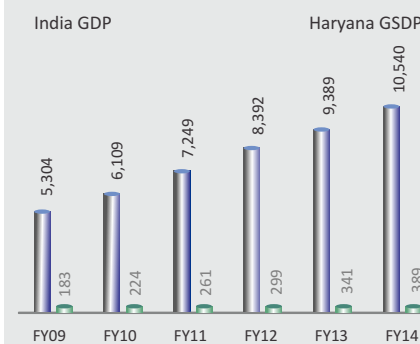
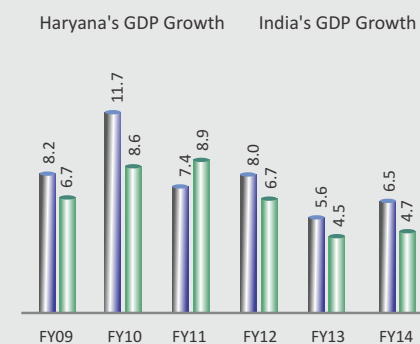
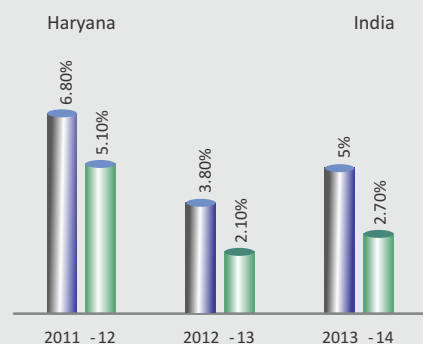
Source: NCR Planning Board

Haryana has shown robust economic growth over the years, both at the State and Individual Levels

3.3% higher per capita growth than that of the average Indian

GDP growth rate consistently higher than the National average

Only 1.3% of India's area , the state contributes nearly 3.5% to India's GDP



- 8 major diversified Industrial Clusters
- Entire state covered under at least one major industrial corridor – DMIC, AKIC or KMP
- 1,356 large and medium industries
- Largest concentration of EMC pan India - 10
- 13 districts of the state are a part of the National Capital Region (NCR)

- Greenfield Global Smart City
- Circular Metro around NCR Satellite Towns
- 20 mins from New Delhi Airport
- IT/ITeS and Manufacturing Hub
- World Class Social Infrastructure; Houses expats from 56 countries

- 99.88% metaled road connectivity
- 27000 kms of road
- 1630 kms of railroad
- 2 International Airports
- 1 Upcoming Aviation Hub

One of the largest Urban-Industrial setups in the country

Gurgaon is poised to become the benchmark of smart urban development in India

Seamless & unparalleled access within the region, country and globally






To sustain the industrial growth, over 160K skilled and semi-skilled professionals are added each year to the labor pool

Best in class skill development and education infrastructure







- Gurgaon has the second highest per capita Post Graduate population
- Haryana has 11.5% total enrolments in education in comparison of nation average of 8.3%
- 44 universities including 1 Central University, 15 State Universities, 19 Private Universities and 9 Deemed Universities with more than 777 Colleges
- Home to leading educational institutions including
 - IIM Rohtak
 - NIT Kurukshetra
 - National Dairy Research Institute
 - National Institute of Food Technology Entrepreneurship and Management
 - Footwear Design and Development Institute
 - Central Institute of Plastic Engineering
 - Regional Labor Institute
- New institutes in pipeline: NID, Extension of IIT at Rajiv Gandhi Education City, NIFD and IIIT

| Streams | No. of Institutes | Intake |
|----------------------|-------------------|---------|
| Engineering Colleges | 159 | 54,241 |
| Polytechnic | 187 | 58,915 |
| MBA Colleges | 171 | 12,875 |
| ITIs | 123 | 39,140 |
| B. Pharmacy | 33 | 2,040 |
| Medical Colleges | 5 | 600 |
| Total | 678 | 167,811 |

The State continues to invest across Industrial & Related Infrastructure to make it future ready

| Rail  | Road  | Air  |
|---|--|--|
| <ul style="list-style-type: none"> • 1630 Kms of Rail Network • Metro rail network across satellite towns of NCR at the cost of US\$ 3.1 Bn to result in a massive urban-industrial setup | <ul style="list-style-type: none"> • 27000 kms including 1462 kms of National Highways • KMP Industrial Corridor to be built at the cost of US\$ 2 Bn with 67000 acres of industrial cluster | <ul style="list-style-type: none"> • 1 domestic + 5 civil airports; 20 mins from Delhi International Airport • MRO Hub at Hisar (2200 acres) • New cargo airports |



| Education  | Health  | Telecom  |
|---|--|--|
| <ul style="list-style-type: none"> • Leading Engineering & Management Schools (NIT, IIM) • Global Education City planned at Rajiv Gandhi Education City • Prestigious AIIMS to be set up in the State at Jhajjar | <ul style="list-style-type: none"> • 57 major hospitals • Construction of 7 CHCs, 39 PHCs and 145 SHCs completed • US\$ 400 Mn. to be invested towards Public Health over a period of 3 Years | <ul style="list-style-type: none"> • Faridabad, Sonapat & Rewari connected via Broadband • The State to connect all of its villages and towns with broadband access under the BharatNet Scheme |
| Power  | Industrial  | Social  |
| <ul style="list-style-type: none"> • Generation capacity increased from 1587MW to 8790.41MW (FY05-FY15) • Over US\$ 3 Bn. being spent to strengthen T&D network • Focus on Solar Power | <ul style="list-style-type: none"> • 103 industrial estates have been established by HSIIDC • A 107 acre Export Promotion Industrial Park (EPIP) to be set up • Logistics Park at Bawal | <ul style="list-style-type: none"> • Gurgaon is home to high-end hotels, convention halls, international schools, entertainment zones. • Karnal, Faridabad and Gurgaon to be Smart Cities |



Investment Opportunities

60% of the state is flanked by two major industrial corridors – Delhi Mumbai Industrial Corridor (DMIC) on the northern side and Amritsar Kolkata Industrial Corridor (AKIC) on the southern side. This coupled with the Kundli-Manesar-Palwal (KMP) Expressway will provide an opportunity for investments in excess of one lakh crore.

Kundli-Manesar-Palwal (KMP) Expressway

Opportunity:

- Taking over the Annuity payment for the Manesar Palwal section
- Toll Payments for the Manesar Palwal Section through the long tenor funds

Project Details

135 km long 6 lane expressway with four major National Highways crisscrossing the state connecting Delhi with rest of the country

2 kilometer of controlled area along the KMP alignment is being developed as Economic Corridor for development of Transit & Tourism Oriented Projects, with an industrial area of 27000 hectares (66000 acres) and investment potential of US\$ 50 Billion.

The project is being implemented in two separate phases:

- The First Section, which is 52.33 km between Manesar and Palwal, being implemented under the under EPC Model at cost of Rs.401.49 Crore and the stipulated date of completion is 23.01.2016. The Toll for the road would be collected by HSIIDC through a Collection Agency
- The Second Stretch, which is 83.320 km long between Kundli & Manesar , is being developed under BOT (Annuity) Model with the project cost of Rs. 1863 Crore



Global Smart City

| Project Details | Opportunity: |
|---|---|
| Developed over an area of 1000 acres in Gurgaon district and positioned as a sub-node within the DMIC Sub-Region of Haryana | <ul style="list-style-type: none"> The project is to be developed over an area of 1000 acres with an investment of more than Rs.15000 crore (US\$ 2 billion) in infrastructure and investment potential of US\$ 15 billion ; Funding of the project through long tenor loans with longer moratorium and through equity participation by strategic equity partners |
| Joint venture between HSIIDC and DMICDC | |
| Inception Report approved | |
| Site is clear from the NCZ applicability | |



Integrated Multi Modal Logistics Hub



| Opportunity: | Project Details |
|--|---|
| <ul style="list-style-type: none"> The project is to be developed over an area of 1000 acres with an investment of more than Rs.5000 crore (US\$ 1 billion) Funding of the project through long tenor loans with longer moratorium and through equity participation by strategic equity partners | To be developed as the largest logistics hub in North India over 1200 acres |
| | Will reduce the transport time from 14 days to 14 hours |
| | To be set up at Bawal along the route |
| | To be implemented as a 50:50 joint venture between HSIIDC and DMICDC/DMIC Trust |

Mass Rapid Transit System



Opportunity:

- Project cost Rs.20,000 crore - Funding by JICA Rs. 16000 crore, which is an advanced stage;
- Balance Rs. 4000 to be contributed equally by HMRTC & DMICDC – soft loan for Rs.2000 crore or through equity participation by a **long term strategic equity partner**;
- Soft funding for cost of acquiring land for MRTS – Rs. 1500 crore for HSIIDC

Project Details

TMRTS project worth US\$ 3.1 billion approved

Circular Metro around NCR Satellite Towns in and around Gurgaon (Gurgaon Manesar Bawal)

Implementation Model ~ SPV of HMRTC and DMICDC

Alignment through Global City approved and

Maintenance, Repair and Overhaul (MRO) Hub



Opportunity:

- Set- up manufacturing hubs to cater to business needs such as Precision machined aero engines & aero structure
- Potential to develop repair and maintenance warehouses in Aerospace and Defence park

Project Details

Hisar is set to house an ultramodern integrated aviation hub that would cater to :

- Maintenance, repair and overhaul (MRO) services
- Fixed-base operations (FBO)
- Aerospace park

To be developed on around 2,000 acres adjoining the existing civil airport spread in 194-acres on the outskirts of Hisar town

Estimated Project Cost: US\$ 5,000 Crore

Prominent Corporate Presence

Thriving presence of more than
250 Fortune 500 companies



Focus Sectors



Focus Sectors Highlights and Potential Opportunities

Highlights

Potential Opportunities

Automotive Industry



- India's Largest Auto Hub: Produces 50% of the passenger vehicles, 39% of India's 2-wheeler production, and 11% of India's tractor production
- Home to three SME auto-component clusters, and a strong base of about 90,000 SMEs, thus providing a robust network of auto ancillary companies

- Huge demand for electric vehicles that are suited for safe short distance urban travelling
- Develop R&D Centre to support multinational companies and training for smaller auto-ancillary companies
- Opportunity to set up large manufacturing centers along the industrial corridors
- Industry sales are expected to increase to USD 40 billion by 2016 with about USD 20 billion generated from exports

IT/ITeS & ESDM



- 3rd largest exporter of software in the country
- More than 400 IT and ITeS companies in Gurgaon with a workforce of 2.53 lakh people
- Gurgaon is the BPM capital of the world, employing nearly 5% of worldwide BPM workforce

- Huge potential for Electronic System Design & Hardware Manufacturing
- Animation, Visual Effects, Gaming & Comics is a high growth sector, and there is abundant availability of skilled workforce in Gurgaon.
- Cost-effective labor pool for Tier-2 townships to set up Rural BPOs, incentives by state
- Data Centres are worth USD 1 bn, India set to become regional hub

Focus Sectors Highlights and Potential Opportunities

Highlights

Potential Opportunities

Textiles



- 4th largest producer of cotton in the country
- Readymade garments worth around US\$ 1.3 billion exported annually
- Panipat, known as the "City of Weavers" with 150 ginning units and employment of one million workers established itself on the Global Map

- Opportunity for Textile & Footwear Parks
- Manufacturing of Home Furnishings in and around Panipat
- Textile specific Skill Development Centres can be set up in Haryana with textile-allied skills
- Integrated Textile Units (Spinning, Knitting, Dyeing)
- Manufacturing of Technical Textile – (Sports, Automotive, Agro, Defense)

Footwear & Accessories



- India is the 2nd largest producer of footwear and leather garments; has largest livestock population in world
- Haryana is one of India's major production centres of leather and leather products
- Footwear hub proposed along with Footwear technology institute, with some funding channelized under "Mega Leather Footwear Park" of Gol

- Latest Enterprise Promotion policy offers excellent support to investors for investing in Haryana
- Industrial estates and Footwear Park at Bahadurgarh which is also a footwear hub
- Investments in major footwear clusters at Karnal, Faridabad, Bahadurgarh, Gurgaon, Manesar, Sonapat, Kundli and Ambala which are involved in end to end product value chain

Focus Sectors Highlights and Potential Opportunities

Highlights

Potential Opportunities

Agro based and Food Processing



- 2nd largest contributor of food grains to India's central pool
- More than 60 per cent of the export of Basmati rice in the country
- One of the biggest employment generators in rural Haryana with strong potential in value addition and exports.

- Investments in planned Integrated Logistics hub at the upcoming Delhi-Mumbai Industrial Corridor (DMIC)
- Cold Storages, Silos, warehouses, Packaging houses, Quality Control and R&D Labs
- Mega Food Parks in Rai (Sonapat) and in Saha(Ambala)
- Technology initiatives, Agro-cargo handling, mechanized grain handling & storage.

Renewable Energy



- Solar Power generation present installed capacity is ~8 MW (2014)
- Endowed with solar radiations with about 320 days of clear Sun in a year
- Government has granted licenses to 50 proposals for establishment of IT/Cyber projects as of August 2015

- Development of first solar park in Haryana (300 acres earmarked by HSIIDC and HPGCL)
- Commercial solar power generation projects in Bhiwani, Hisar, Jhajjar, Karnal and Mahendergarh areas. Some in consultation with irrigation department
- Huge Demand: The solar power generation capacity by 2022 is required to be increased to 1300 MW to meet solar RPO

Focus Sectors Highlights and Potential Opportunities

Highlights

Potential Opportunities

Aerospace and Defence



- Strategic location: No place in the State is more than 250 kms from India's largest international airport (Delhi)
- Haryana has 5 civil airstrips and 2 defence airforce stations
- Upcoming Aviation Hub providing MRO facilities at Hisar

- Investments in the Aviation hub at Hisar which consists of an airstrip, Maintenance Repair and Overhaul (MRO), FBO & A&D Mft
- Setting up an Aerospace and Defence Mft Facility for aircraft as well as equipment manufacture
- Defence equipment testing facility and spare part manufacturing facility
- Cargo Warehouse in association with proposed International cargo airport at Biwal in Rewari

Pharmaceuticals & Chemicals



- More than 450 working factories producing chemicals and chemical products
- Centre of Excellence on DNA Testing & Diagnostics facility for research & application at Centre for Plant Biotechnology, Hisar
- Integrated Petro-chemical Hub near IOCL Refinery in Panipat

- Development of industrial corridors include a growing construction industry with need of paints, adhesives, polymer-based material, plastics and coatings
- Availability of raw material, especially Naptha, PX, PTA from Indian Oil Refinery at Panipat offers a great scope for downstream oil and petrochemical industries
- Agriculturally a rich state, Haryana has potential for investments in fertilizer manufacture at Karnal, Panipat, etc

Policy Support

The Enterprise Promotion Policy 2015 (EPP) aims at balanced industrial growth in the State

5 Pillars of EPP 2015



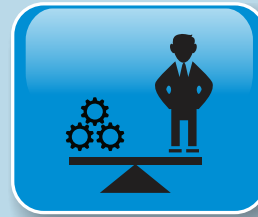
Ease of
Doing Business



Enhancing Competitive
ness of Industry



Building MSME &
Services Sector



Balanced
Regional Growth

Implementation Mechanism/
Structures of IIBPP 2015

Fiscal and Non-Fiscal incentives to lower the Cost of Doing Business

VAT/SGST Reimbursement

- Tax Reimbursement: @50-75% of VAT/SGST net paid for 8-10 years

Interest Subsidy

- Reduced interest: @5%-6% on term loan for 3-5 years

Support to Thrust Sectors

- Special incentives have been provided to the thrust sectors i.e. Textiles, Food Processing & Agro based industries, Footwear Industries, Defence/Aerospace Industries etc.

Service Sector

- 2VAT/SGST net paid @50%
- 50% - 75% Electricity Duty Exemption
- 30%-50% Refund of Stamp Duty

Land Related Incentives

- No Enhancements on future land allocations
- Land with a clear title

MahaNivesh Yojana

- 1 Special dispensation including mix land use etc. developed over \geq 500 acres with a minimum investment of US\$ 1 billion

Zero Defect and Zero Effect

- Financial assistance and support for quality certification, technology acquisition & upgradation as well as establishment of ETPs

Increase in FAR

- Higher FAR of 150% will be provided with approval of HEPB

Support to Startups

- Collateral free loan
- US\$1.5 billion fund for soft loans

Support to MSMEs

MSME Fund

- Rs. 1000 Crore (US\$ 160 Mn.) MSME Fund to assist entrepreneur with collateral free debt upto Rs. 1 Crore

Infrastructure Support

- Rs. 1000 Crore (US\$ 160 Mn.) for infrastructure support to MSMEs
- Creation of developed sheds/flatted factories in Industrial Estates for MSMEs on Panchayat lands on lease basis

Cluster Development

- More than 20 clusters have been identified for development /support across the state involving more than 6000 MSMEs.
- Special focus is being laid on Traditional Clusters, Rural Functional Clusters and Thrust /Focus Clusters



Power Tariff Subsidy

- Rs. 2 per unit for Micro and Small Enterprise in 'C' and 'D' Category blocks for 3 years from the date of release of electricity connection

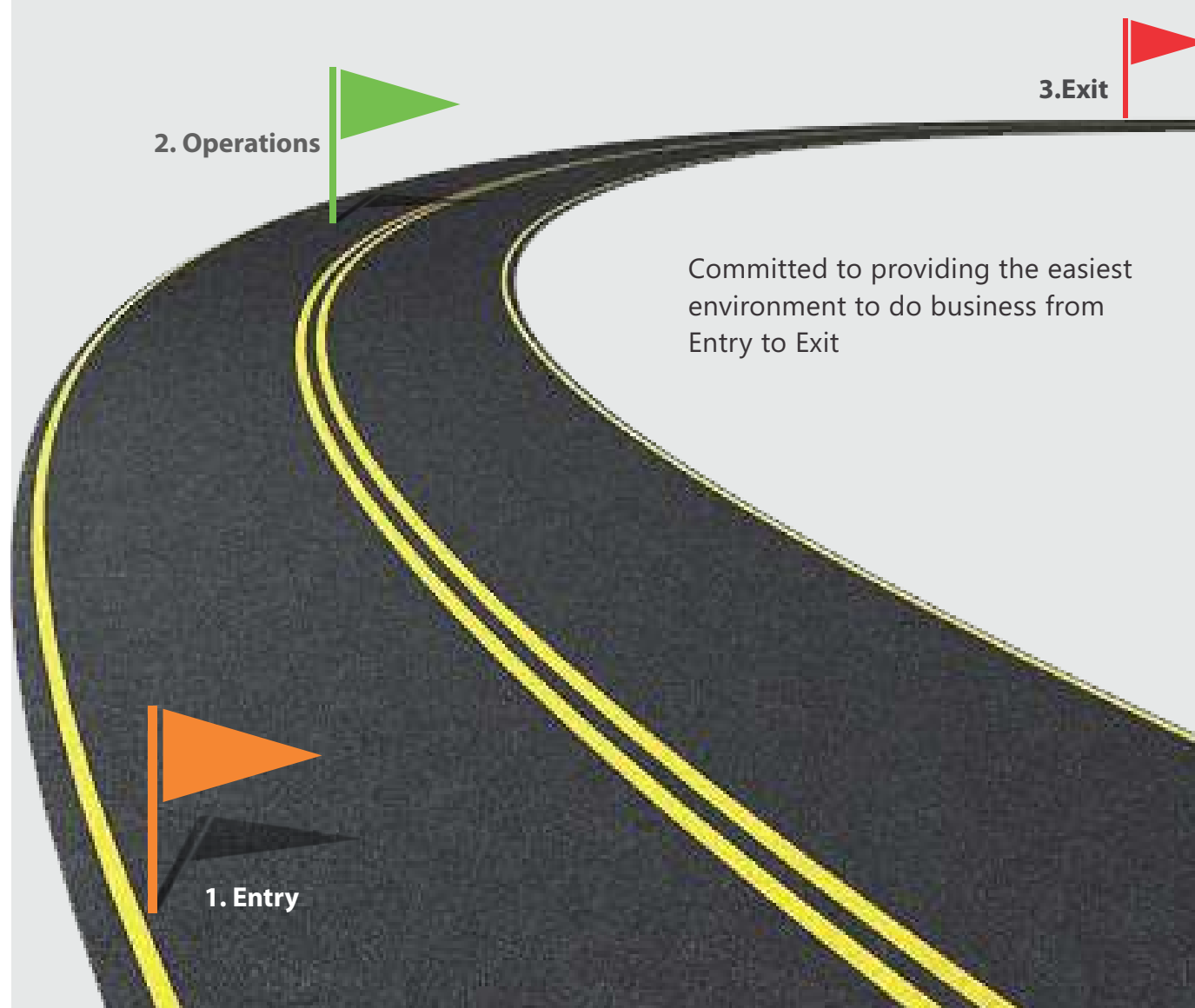
e-Commerce Portal

- An e-commerce portal for online trading, marketing of MSMEs/ Khadi/ Handicraft products to be set up
- Financial provision of Rs. 10 Crore (US\$ 1.5 Mn) will be made for this purpose

Skilling

- 2 technology centres cum skill development centres at Rohtak and Saha
- Rs. 225 crore (US\$ 37 Mn.) investment for the purpose

Ease of Doing Business



1

Single Roof System for Clearance

- Deemed acceptance of key approvals in case of delay
- Different empowered committee's to give approval basis scale of project
- Provision of constituting Haryana Enterprise Promotion Board under Chairmanship of Hon'ble Chief Minister

Time bound clearance

- Enactment of Right to Public Service Act for time bound delivery of services
- A total of 119 services to industries are notified under the act

Simplified Land Allotment

- Allotment of Industrial plots based on objective criteria
- Removal of requirement of CLU (Change of Land Use) in 31 Industrial blocks
- Provision of automatic CLU in 75 industrial blocks

Investor Facilitation

- individual relationship managers for every large investor

2

Tiered Grievance Redressal System

- Creation of policy implementation, monitoring & grievance redressal structure
- Enterprise Assistance Group - Correction plan to detect stress and corrective plan

Relaxation on labor/Environment Inspections

- No random inspections unless specific violations
- Decrease In periodicity of inspections
- Time bound electronic mechanism

Security

- Industrial Intelligence Unit set up for quick action
- Police Stations within Industrial Parks

3

Relaxation in labor laws

- Relaxation in threshold in event of retrenchment/lay off/closure limit under Industrial Disputes Act
- Relaxation in applicability of Contract labour Act