Presentation by:

Dr. Vaibhav A. Tandale
Agenda

1 - Where we are
2 - Making Way for FDI
3 - Projects
4 - Maharashtra Invites You...
Where we are
Profile of Maharashtra

Capital **Mumbai**

Geographical Area (lakh sq. km) **3.08**

Administrative districts **36**

State population **118.1 Million**

Urban: Rural population **45%:55%**

Population density (persons per sq. km) **365**

Sex Ratio **1000:929**

State Language **Marathi, Konkani, Hindi, English**

Literacy Rate **82.3 per cent**

State Human Index **0.695**

Cities with 10 lakh+ population **Greater Mumbai, Pune, Nagpur, Vasai-Virar, Aurangabad**
Profile of Maharashtra

Highest Contribution to India’s GDP

Maharashtra’s GSDP at current prices was $336.4 billion in 2016-17 and accounted for 14.8 per cent of India’s GDP.

Highest FDI in India

Total FDI in the state during April 2000 to December 2017 stood at $113.82 billion.

India’s Financial and Educational Hub

Mumbai, the commercial capital of India has evolved into a global financial hub. The city is home to several global banking and financial service firms. Pune has emerged as the educational hub.

Industrial Power House

Maharashtra has maintained the leading position in the industrial sector in India. The state is a pioneer in small scale industries and boasts of the largest number of special export promotion zones.

Largest Container Port

Jawaharlal Nehru Port, Mumbai is the largest port in India in terms of container traffic. During 2017-18 (up to February 2018), the port handled 59.876 million metric tons of traffic.
Economic Snapshot

GSDP of Maharashtra current prices

CAGR\(^\uparrow\) 11.77%

<table>
<thead>
<tr>
<th>Year</th>
<th>US$ billion</th>
<th>Rs trillion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-12</td>
<td>267.02</td>
<td></td>
</tr>
<tr>
<td>2012-13</td>
<td>268.07</td>
<td></td>
</tr>
<tr>
<td>2013-14</td>
<td>272.68</td>
<td>16.50</td>
</tr>
<tr>
<td>2014-15</td>
<td>291.21</td>
<td>17.81</td>
</tr>
<tr>
<td>2015-16</td>
<td>303.50</td>
<td>19.87</td>
</tr>
<tr>
<td>2016-17</td>
<td>336.42</td>
<td>22.57</td>
</tr>
<tr>
<td>2017-18</td>
<td>387.36</td>
<td>24.97</td>
</tr>
</tbody>
</table>

GSDP\(^\ast\) composition by sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>2011-12</th>
<th>2017-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>51.07%</td>
<td>33.60%</td>
</tr>
<tr>
<td>Secondary</td>
<td>30.88%</td>
<td>15.50%</td>
</tr>
<tr>
<td>Tertiary</td>
<td>18.05%</td>
<td>11.90%</td>
</tr>
</tbody>
</table>

FDI Inflows in Maharashtra
April 2000 – June 2018 (US$ billion)

<table>
<thead>
<tr>
<th>FY01-11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19**</th>
</tr>
</thead>
<tbody>
<tr>
<td>45.07</td>
<td>9.55</td>
<td>3.42</td>
<td>6.36</td>
<td>9.51</td>
<td>19.65</td>
<td></td>
<td></td>
<td>2.43</td>
</tr>
</tbody>
</table>

Note: Data for FDI includes Dadra & Nagar Haveli and Daman and Diu. \(^\ast\) - CAGR in Rs. \(^\ast\)\(^\ast\) - Sector-wise % share of GSDP - Geometric mean of YoY calculation from 2011-12 to 2017-18, \(^\ast\)\(^\ast\) - Up to June 2018
Source: Directorate of Economics & Statistics of Maharashtra, Central Statistics Office, Department of Industrial Policy & Promotion, Based on "Advanced Estimates" provided by Directorate of Economics and Statistics of Maharashtra, Government of Maharashtra

April 2019
Highlights

Economy

- GSDP as a percentage of all states' GSDP (2015-2016): 14.49
- GSDP growth rate (%) (2015-2016): 9.9
- Per Capita GSDP (US $) (2015-2016): 2,545

Industrial Infrastructure

- Operational PPP projects (no.): 1,144
- Operational SEZs (no.): 28

Physical Infrastructure

- Installed Power Capacity (MW): 42,356,85
- Wireless Subscribers (no.): 130,136,065
- Internet Subscribers (in million): 58.34
- National Highway Length (in Km): 15,436
- Major and Minor Ports: 2+53
- Airports: 11

Primary Sector - Forestry and Fishing
Secondary Sector - Manufacturing, Construction and Electricity, Gas & Water Supply Industries
Tertiary Sector - Trade, Hotels, Real estate, Finance, Insurance, Transport, Communications and other services
May 2017, Government unveiled a **new energy conservation policy** aiming to save 1,000 MW of electricity and US$ 933 million. The policy emphasizes on use of renewable energy and switching to energy efficient methods.

The Government proposed a scheme **for improving electricity distribution system** in the State. As per the budget 2016-17, an investment of US$ 45.98 million has been projected for this new scheme.

The **private sector is the biggest contributor** to the total installed thermal power generation capacity in Maharashtra with a capacity of 13,024.00 MW.

April 2018, the **Maharashtra State Electricity Company Ltd** embarked a US$ 20.17 million project to develop and expand power infrastructure in Mumbai, Thane, Navi Mumbai and Kalyan-Dombivili.

As of January 2019, the state had a total installed power generation capacity of **43,779.10 MW**.
Aggregate deposits and credit of scheduled commercial banks in Maharashtra stood at US$ 334.2 billion and US$ 355.20 billion respectively, in 2017-18.

Mumbai is the capital of the state of Maharashtra and the financial capital of India. The city houses a majority of the headquarters of large corporates and financial institutions in the country. In addition, major stock exchanges, commodity exchanges and capital markets of India are situated in Mumbai.

Mumbai is home to 3 stock exchanges (BSE, NSE and MSE) and 3 commodity exchanges (ICEX, MCX, NCDEX). The market capitalization of BSE and NSE has increased at a CAGR of 19.5 per cent and 14.5 per cent to US$ 2.3 trillion and US$ 1.8 trillion, during FY12 to FY17, respectively.
The number of companies listed on NSE and BSE have increased to 7,547 in FY18 as compared to 6,779 in FY12.

A new financial technology policy was approved by the state government in February 2018 with the aim of making Maharashtra one of the top five financial technology centers in the world in the next five years. A venture capital fund of Rs 200 Crore (US$ 30.89 million) for fin-tech startups in the state.

The Government is setting up the Delhi-Mumbai Industrial Corridor (DMIC) with the help of the Government of Japan, which has agreed to lend US$ 4.5 billion for this project. Seven nodes are in the development stage for the Phase-1 of the project, which is expected to greatly boost India’s manufacturing sector.
According to the Department of Industrial Policy and Promotion (DIPP), cumulative FDI inflows in the state of Maharashtra during April 2000 to June 2018 stood at US$ 118.13 billion.

In 2017, 354 investment intentions worth US$ 7.46 billion have been proposed in the state, making up 12.29% of all the proposals in India.
Transport

Roadways

➢ The state is well connected to its six neighboring states and other parts of India through **18 national highways**

➢ The 94.5 km long Mumbai-Pune expressway is **India's 1st 6-lane, concrete**, high speed, tolled expressway, which connects the state capital & financial hub, Mumbai, with the neighboring industrial hub, Pune.

➢ The state government plans to construct a **new proposed 8-lane highway**, between Mumbai & Nagpur, in which concept of land pooling will come into play.

Railways

➢ The rail transport system of Maharashtra is very well developed. The state is well-connected to other parts of the country with a railway network spanning **6,103 km** (including 378 km of Konkan Railway)

➢ There are **36 on-going projects** `59,624 crorecr for 5976 kms in length`
Airways

➢ There are **seven domestic** and **four international airports** functioning in Maharashtra.
➢ Mumbai airport is one of the busiest airports in India.
➢ Upcoming 8 airports - Navi Mumbai, Solapur, Shirdi, Chandrapur, Karhad, Akola, Amaravati,
➢ In May 2017, the Mumbai airport received environmental clearance for US$ 520.6 million expansion plan, which will allow it to ferry **50 million passengers** by 2020.

Waterways

➢ There are two principal ports: **Mumbai Port Trust (MbPT)** and **Jawaharlal Nehru Port Trust (JNPT)**.
➢ In addition, there are **53 minor ports**. During April-November 2017, total traffic handled at the two major ports in Maharashtra was recorded at **85.59 million tons**.
➢ The non-major ports of Maharashtra collectively handled passenger traffic of around **8.2 million passengers** and **cargo of 15.5 million tons**, during 2016-17 (up to September 2017)
Digital Maharashtra

4.77 million wireline subscribers
130.14 million wireless subscribers
Tele-density: 108.03 per cent

Digital Initiatives

- Smart Cities
- Digital Villages
- Bharatnet & MahaNet
- Aaple Sarkar portal
- Mahalabharthi
- WhatsApp for FIR Registration
- Cyber Security

Digital Milestones

- First State to make all police stations and criminal records online
- 393 services are available online at a click along with many of them also accessible on the Aaple Sarkar mobile app
- Digitization of police stations, Cyber-crime labs & CCTV surveillance in Mumbai and Pune has been undertaken for advanced security with the assistance of technology

India’s Transparency International Ranking – 78 out of 180 countries
Qualified Professionals

### Educational Infrastructure (2017-18)

<table>
<thead>
<tr>
<th>Type of Institute</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Schools</td>
<td>106527</td>
</tr>
<tr>
<td>Secondary and Higher Secondary Schools</td>
<td>26879</td>
</tr>
<tr>
<td>Engineering Colleges</td>
<td>1025</td>
</tr>
<tr>
<td>Industrial Training Institutes</td>
<td>881</td>
</tr>
<tr>
<td>Architecture Colleges</td>
<td>97</td>
</tr>
<tr>
<td>Arts, Science, commerce and Law colleges</td>
<td>2341</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>576</td>
</tr>
</tbody>
</table>

Availability of qualified, multi-sectoral professionals and skilled labour force
Smart Cities

➢ **Identifying the true needs and views of the citizens** through extensive citizen engagement

➢ **Focus on ‘More with Less’ solutions** initiatives that have a high impact on quality of service and infrastructure but are less capital intensive and are easier to implement

➢ **Directing cities raising funds from own sources** making the city’s infrastructure projects to become self-sustainable and not dependent on State or Central funds to develop city infrastructure.

➢ **Aiming on low-cost Information-Communication & Technology (ICT) based solutions** to improve quality of infrastructure.

➢ **Focusing on ability, feasibility and impact which** will ensures that plans and proposals made are not just paper plans but real, effective solutions that will actually solve the city’s problems.
Making way for FDI
## Policies

<table>
<thead>
<tr>
<th>Public Cloud Policy</th>
<th>The policy mandates Government departments to shift their data storage onto Cloud. It will also accelerate investments into the Mumbai Metropolitan Region as it supports a number of data centers and has advantages like availability of uninterrupted power, presence of academia and skilled manpower.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maharashtra Electric Vehicle Policy 2018</td>
<td>State to give a push to battery operated vehicles in a big way and to realize this around five lakh battery-powered vehicles will be manufactured in five years. Investment of 25,000 crore to be made. One lakh employment opportunities to be created. In first phase six cities: Mumbai, Thane, Pune, Nashik, Aurangabad, and Nagpur to be covered.</td>
</tr>
<tr>
<td>Fintech Policy 2018</td>
<td>Maharashtra first State to establish Fintech policy in the country. The State Government will support 300 startups in the next three years. Fintech startups to be provided 200 crore as venture capital. Will make State one of the top five fin-tech centers in the world in the next five years. Fintech startups to be provided with better facilities/opportunities.</td>
</tr>
</tbody>
</table>
### Policies

<table>
<thead>
<tr>
<th>Maharashtra Logistics Park Policy 2018</th>
</tr>
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<tbody>
<tr>
<td>Bhiwandi, Panvel, Taloja, Nashik, Aurangabad, Talegaon, Nagpur have been designated as ‘Logistics Zones’. Logistic services, merchant-commercial facility to be provided. Additional FSI upto 200 percent, among other benefits.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Maharashtra State Innovation &amp; Start-Up Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistance: Development of infrastructure and facilities; Human capital and skill development; fiscal and non-fiscal incentives, concessions/encouragement; Industry engagement and monitoring; Rural and social enterprises</td>
</tr>
<tr>
<td>Industries: construction, production, manufacturing, textile, automotive, hospitality, healthcare, banking, finance and insurance, organized retail, pharmaceutical and chemical, information technology and enabled services, agro-processing and biotechnology</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Electronic System Design and Manufacturing Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>The ESDM policy create a specialized governance structure within the Government for the specific needs of the sector and to promote creation of Intellectual Property (IP) by allocating more funds to Research and Development for start-ups in the electronic and nano electronics sector.</td>
</tr>
</tbody>
</table>
Ease of doing Business

India’s current EODB Rank is 77 - Improved by 23 Positions from 2017

PROPERTY REGISTRATION
- Sub Registrar office is computerized
- Computerized property bills
- E-payment of fees

ELECTRICITY
- Procedures reduced from 7 to 3
- Time from 67 to 15 days

LAND REFORMS
- Increase in FSI from 1 to 1.5 for industry set up
- Additional FSI up to 200% for IT SEZ

LABOR REFORMS
- Self-certification scheme with Single Integrated Return Form for 16 Labor Laws

SINGLE WINDOW
- MAITRI: Investor facilitation cell
- Assists investors in obtaining approvals for 31 services across 8 departments

CONSTRUCTION PERMITS
- Procedures reduced from 27 to 11
- Time reduced from 162 to 50

ENVIRONMENT
- MPCB: Randomized risk based inspection & submission of inspection reports within 24 Hrs
- River Regulation Zone policy: Discontinued

TAX
- Common Application form for VAT, Professional tax & CST
- Property Tax payment: Mobile app
- Commercial cases: 7 benches High Court judges appointed

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As envisaged in the Industrial Policy 2013, the State has started Investor Facilitation Cell which marks a shift in the mind-set of the Government from being a regulator to that of a facilitator.

MAITRI is a completely digital, one stop Government to Business (G2B) Portal for existing and prospective investors to get consolidated information about the investment process with regards to expanding their existing units, or to set up a new business unit in the State.

MAITRI will provide services such as handholding support, management of web-based portal, coordination with different government agencies etc.
Projects
Key Projects

**Delhi Mumbai Industrial Corridor**

Covers 8 districts, 29% of area; 4 major nodes have been identified in the DMIC influence area.

**SUPA – Japanese Investment Zone**

Multiproduct Industrial park to be set up on the contiguous land of 500 acres at Supa.
Key Projects

Dighi Port Industrial Area
Shendra – Sidkin Mega Industrial Park

Metro Rail Projects

Metro projects in Mumbai, Pune and Nagpur

Navi Mumbai Airport

Designed to accommodate the new large aircrafts compatible with ICAO Aerodrome Code 4F
Upcoming Projects

Mumbai Trans Harbor

International Financial Services Centre

MADC-MIHAN

NAINA City
Maharashtra Invites You...
Creating Smart Villages: Digitalization of 29,000 Gram Panchayats under MahaNet on the lines of BharatNet will help 40,913 villages across Maharashtra.

Developing Infrastructure: With large number of infrastructure projects, the Government has taken a step ahead to keep pace with urbanization. Nagpur-Mumbai Super communication Expressway, the longest eight-lane stretch at 706 km spreading its dividends to 24 districts, would help in the development of two and three tier cities/towns across the State.

Tapping into each city's forte: Mumbai will become the Fintech capital of India, Pune the IT and start-up capital, Amravati the textile hub and Nagpur the electronic and defense hub. Aurangabad is emerging as the new industrial corridor and Nashik as a pilgrimage and tourism destination.

Building connectivity: Through rapid integrated transport system model quick connectivity is essentially being created. Mumbai, is moving with a 272 km metro network creating additional commuter capacity of 90 lakh. The metro work underway in Nagpur and Pune, gives Maharashtra a clear edge in terms of transport facilities.

Forecasting crop productivity: There are ongoing discussions about leveraging predictive technology to help Maharashtra with forecasting crop productivity.
# Mumbai and Pune Regions

<table>
<thead>
<tr>
<th>Mumbai Metropolitan Region Development Authority</th>
<th>Pune Metropolitan Region Development Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 2.48 Crore</td>
<td>• 1.01 Crore</td>
</tr>
<tr>
<td>• 4354 sq. Km.</td>
<td>• 6616 sq. km.</td>
</tr>
<tr>
<td>• Multiple metro lines</td>
<td>• Upcoming region</td>
</tr>
<tr>
<td>• Multi modal integration</td>
<td>• Multiple metro lines</td>
</tr>
<tr>
<td>• Large infrastructure projects</td>
<td>• Infrastructure projects</td>
</tr>
</tbody>
</table>

April 2019
Advantage Maharashtra

Policy incentives

- Mumbai: Trade and Commerce Capital & Financial Centre of India.
- Maharashtra has emerged as a key hub for IT and ITeS, electronics and captive business outsourcing industries.

Facilitating Infrastructure

- The Government of Maharashtra has several policies in place to set up the right kind of business climate.
- These policies aim to motivate investors to invest into various sectors in the state, thereby contributing to the overall development of the economy.

Trade and commerce hub of India

- Maharashtra has a literacy rate of 82.3% and is home to world class educational and IT institutions.
- The state has a large base of skilled and industrial labour, making it an ideal destination for knowledge based and manufacturing sectors.

Rich pool of skilled labour

- A well developed social, physical and industrial infrastructure. And a well developed power supply grid.
- Infrastructure sector has grown with a rise in the number of industrial clusters and Public Private Partnership (PPP) projects.
Call to Opportunity

- Large contract execution
- Consulting/Strategy advise assignments
- PPP projects, concessionaire projects
- Funding opportunities
Thank You