Government of Telangana Welcomes JETRO Delegates
TELANGANA AT A GLANCE

- Telangana is the youngest State (29th) in the Union of India.
- Capital: Hyderabad
- Area: 1,12,077 Sq Km (larger than S. Korea)
- Population: 35 Million (more than Canada)
- Urban population: 38.9% of population
- GSDP (2016-17): $ 100.15 Billion
- Growth % : 13.7%
- Per Capita Income: $ 2421
- Revenue Surplus State
- Districts: 31
- Households: 10 Million
- Major Industries: IT, Pharma & Biotech, Textiles, Aviation, Food Processing, Automotive, Plastics & Chemicals
ADVANTAGE TELANGANA

- Natural gateway to both North and South India

- 24,245 kms of road length with 3,152 kms of State Highways, 12,079 kms of Major District Roads, and 9,014 kms of Other District Roads
  - 16 National Highways covering 2,592 kms

- Airport connecting international and domestic key cities

- Abundant Natural Resources and Minerals
CM K Chandrashekar Rao chosen as ‘Most Popular CM’ in India 2016 (VDP Associates)

CNN IBN ‘Indian of the year 2014’ Popular Choice Award to CM K. Chandrashekar Rao

Audi-Ritz ‘Most Inspirational Icon of the Year’ Award for Minister K T Rama Rao 2015

Skoch IT Minister of the year to Minister K T Rama Rao 2017

India Today State of States 2015 Award for Inclusive Development in Best Infrastructure Category.

HUDCO’s Award for Water Grid Project

India Today Conclave 2014 Best Infrastructure Award

Outstanding Performance in Renewable Energy Award at Renewable Energy Global Investment and Expo 2015
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>BEST REFORMS</strong></td>
<td>Telangana ranked 1\textsuperscript{st} in Ease of Doing Business Reforms 2015-16</td>
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<td><strong>ECONOMIC GROWTH</strong></td>
<td>Increased from 6.43% to 9.24% since formation</td>
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<td><strong>REVENUE SURPLUS</strong></td>
<td>Budget for a record 3\textsuperscript{rd} time – high financial discipline maintained by State Government</td>
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<td><strong>E-TRANSACTIONS</strong></td>
<td>Telangana achieved 1\textsuperscript{st} rank in India in cashless transactions</td>
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<td><strong>HIGH PER CAPITA INCOME</strong></td>
<td>Rs 1,58,360 in 2016-17 which is higher than national average of Rs 1,03,818</td>
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<td><strong>BEST POLICY</strong></td>
<td>Industry friendly policy – TS-iPASS</td>
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<td><strong>AWARDS</strong></td>
<td>Telangana chosen as ‘Promising State of the Year’ by CNBC-TV18</td>
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<td><strong>MANUFACTURING SECTOR</strong></td>
<td>Growth from 5.85% in 2014-15 to current growth of 9.50%</td>
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MAJOR GOVERNMENT INITIATIVES

- **Mission Bhagiratha**
  Tap water to One Crore homes

- **Mission Kakatiya**
  To restore 46,631 water bodies with storage capacity of 265 TMC over four years

- **Haritha Haram**
  Forest area to go up to 33% from current 23%

- **150,000 Acres**
  Ready Land Bank

- **2 Bed-Room**
  Houses for Poor

- **Telangana Fiber Grid**
  Optic Fiber to One Crore homes

- **16% Power generation**
  through Solar power, much above the recommended 10% under National Solar Mission

- **400% Capacity Addition**
  Power addition planned for next 4 years

- **Assured Water**
  10% of all irrigation projects earmarked for industries

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Total length of pipelines, in this project is 144,000 kms which includes construction of new pipeline of 100,000 kms.

The work progress is at advanced stage of completion. The physical progress of works is in line with advanced action plan.

A great volume of work was done with mission mode approach within the short period of 2 years. Till date 3216 habitations are covered with Bulk supply.

The original targeted plan of completing by 2018 is advanced and action plan is prepared for supply of potable water to all the 24,225 habitations by December-2017.

The Gajwel Sub-segment was already commissioned by the Hon’ble Prime Minister on 7th August 2016.

Along with the pipes laid down under Mission Bhagiratha, Optical Fiber Cable duct is also being provided to give access to broad band services to each household and institutions under Digital Telangana Program.
SIGNIFICANCE AND OBJECTIVES OF MISSION KAKATIYA

• Over 85% of the farmers are small and marginal category with an average land holding size of 1.11 ha.

• 63% of the farmers in Telangana depend on rain fed agriculture and more than 70% of cropped area is rain fed resulting in lower yields per unit area

Objectives

• To effectively utilize the 265 TMC of water allocated for minor irrigation sector under Godavari & Krishna River basins.

• To increase in coverage of reliable minor irrigation facilities through surface and groundwater management;

• To increase agricultural productivity including livestock, fisheries and horticulture
WORKS PROPOSED UNDER MISSION KAKATIYA

- De-silting of Tanks
- Restoration of Feeder Channels
- Re-sectioning of Irrigation Channels
- Repairs to CM & CD works
- Repairs to Bund, Weir & Sluices
- Raising of FTL, wherever possible

CHAIN OF TANK SYSTEM

The chain of tank system is mainly existing in Telangana Region. The surplus water from upstream tank flows to downstream tank in the chain and every tank is having ayacut of its own.

In the series of tanks every tank should be in good condition, if one tank is damaged it will effect total chain system of tanks in that chain.
Feeder Channel After Restoration

Feeder Channel With Water

Improved Water Level in Restored Tank

Farmers spreading silt from tanks in their fields
**TELANGANAKU HARITHA HĀRAM**

- The State Government have initiated a flagship programme; “Telangana Haritha Haaram”.
- The goal is to achieve 33% tree cover.
- The major thrust outside forest areas will be for raising
  - Avenue plantation – Preferably in multiple rows – along the National and State Highways apart from Rural roads.
  - Institutional plantations – All government and private institutions to be covered.
  - Barren Hill afforestation
  - Tank foreshore plantations
  - River and rivulets’ bank plantations
  - Hoemstead & Industrial areas
  - Planting in Urban Residential colonies
Telanganaku Haritha Hāram
ECONOMIC DEVELOPMENT: INDUSTRY & HUMAN RESOURCES

TELANGANA
State Capital......
District…………..

28,458 Acres
Total acreage covered in Industrial Parks

5,430 Acres
Available land for allotment (including UDL)

2,34,990 Acres
Extent of Government land identified fit for Industrial use

Workforce Participation Rates

**Lowest**
Hyderabad, Rangareddy, Medak, Adilabad & Warangal

**Highest**
Mahbubnagar, Khammam, Nalgonda, Karimnagar, Nizamabad


Urban Hubs-Development Nods
- Engineering
- Textile & Garment
- Jewelry
- Agro-based industry
- Defense
- Mining & Allied

State Map with Districts and Major Economic Areas

- Engineering
- Textile & Garment
- Jewelry
- Agro-based industry
- Defense
- Mining & Allied
Ease of Doing Business

STABLE GOVERNMENT
With most industry-friendly policies

BUILDING WORLD CLASS INFRA
24/7 power, water supply, excellent rail, road, air connectivity

UNIQUE FEATURES
In State policies such as TS-iPASS - 0% Corruption achieved through transparent single window clearance policy, T-IDEA and T-PRIDE

EFFECTIVE & TRANSPARENT PROCESS
Transparency, single window clearance system, availability of land, speedy permissions & approval system in place

DECENTRALISED ADMINISTRATION
And effective planning in industrialization, infrastructure promotion, responsive & simplified regulation system
# EASE/COST OF DOING BUSINESS

## Getting Approvals made Easy:
- Attachments, 114 ►► 12 (approval)

## Inspections made Easy
- In 5 years, 50 inspections ►► 1 inspection (labor acts)

## Hassle-free Inspections
- Randomly Picked Inspections & Inspectors

## Joint Inspections
- Different days ►► Same day (department inspections)

## Single Online Register
- Registers, 10 Physical ►► 1 Online (labor acts)

- **Lower Cost** of Doing Business
- **Improved Quality** of Doing Business
TS-IPASS

► Bestowing the right to the investor for a time-bound clearance
  ► 15-day clearances for mega projects and 30-day clearance for other projects: shortest in the country
  ► Deemed to be approved on 16th day or 31st day
► Only state that allows automatic approvals based on self-certification
  ► No need to wait for a prior permission even for a day to get your operations running
► State holds itself accountable for delays
  ► Penalty will be levied on the government official causing the delay
► Example :: Micromax plant came up in 6 months
  ► From the time the land was handed over to the time the plant was fully operational - producing units, and shipping units.
  ► Took them 2.5 years to become functional in another State.

► Telangana: Pioneer in ‘Ease of Doing Business’

► More than 4941 units have got clearances in time bound manner
► More than 59.5% of the units have commenced production

► >$16.44B Investments
► 3,60,000+ employed
**INDUSTRY**

**Life Sciences**
- 20% of world’s vaccines are produced in Hyderabad; Producing bulk drug formulation
- Genome Valley - dedicated ecosystem

**IT Industry**
- Second largest IT exporter in India
- Has large ecosystem of software, hardware, finance, banking, insurance companies

**Defense & Aerospace**
- Largest concentration of defense R&D institutions in India
- More than 1000+ SMEs involves in defense and aerospace industry
- SMEs of Hyderabad produced more than 30% of components for Mars Orbiter Mission

**Other**
- Robust Textile and Gems/Jewelry industry and ecosystem
- Automobile, mineral based, and food processing industry
INDUSTRIAL POLICY - SALIENT FEATURES

► **Land**: Largest Industrial land bank in the country – 140,000 acres

► **Power**: Self-Sufficient; Separate power grid & DISCOM for industries

► **Water**: 10% water from all irrigation sources reserved exclusively for industries

► **Infrastructure**: Industrial parks; ORR; proximity to airport; Development of Industrial parks with state-of-the-art infrastructure

► **Skilled workforce**: Massive Skill Development Programs – through state and central schemes; top universities; hundreds of engineering colleges

► **Ease of Business**: Landmark and unprecedented award winning TS-iPASS

14 Thrust Sectors Identified

► Life Sciences
► Electronics & Semiconductors
► Aviation, Aerospace, and Defense
► Food Processing
► Automobiles
► Textiles and apparel
► Plastics and Polymers

► FMCG and Domestic Appliances
► Metallurgy
► Gems and Jewelry
► Waste Management
► Renewable Energy
► Minerals and Wood
► Transportation and Logistics
Telangana already becoming the most preferred destination – Novartics, Dupoint

- Hyderabad now recognized as one of the leading IT hubs globally
- Over 1400 IT companies, employing 450,000
- $13 B in Software and IT exports
Telangana Ranks 2nd India in IT exports with exports of USD 13 Billion in 2016-17

IT sector provides direct employment to over 450,000 in the State

IT / ITES Exports in the year 2016-17 is 13000 million $ USD

IT / ITES Exports in the year 2015-16 is 11500 million $ USD

Telangana has 40 IT SEZs, out of 348 approved IT SEZs in the country

IT-BPM sector contributes 21% of the total GDP of Telangana as compared to 8.1% in India

Hyderabad stands in second position in the country by contributing 11% of nationwide IT exports

Hyderabad is the 3rd best city globally in LinkedIn IT talent survey – 2014
MAJOR SOFTWARE PLAYERS

Microsoft  facebook  EA Sports  Google

Oracle  HP  Tata Consultancy Services  Yahoo!

Amazon  IBM  DE Shaw & Co  Cognizant

Wipro  Infosys  Dell  Capgemini
Several Malls and international retail stores have their presence in Hyderabad.

Both FlipKart and Amazon picked Telangana for their largest fulfilment center in India.

Ikea to set up its maiden India store in Hyderabad.
ACADEMIC INSTITUTIONS

Indian Institute of Technology Hyderabad
LOGISTICS IN HYDERABAD

- Hyderabad airport ranked 3rd best in the world (three years in a row)
- Air Traffic grew 20% year-over-year 2014-15

- Availability of all radio taxi services – Uber, Ola, Meru etc.

- First phase of Metro Rail inaugurated in Nov 2017 – Aimed at improving the utility of life in Hyderabad
- $2.2B, 31km Metro; ETA for other phase Dec 2018

- Bus service from Airport to city
- Available bus service for within and outside city routes
Famous alumni of Hyderabad Public school (HPS)
► Satya Nadella, CEO Microsoft ;
► Shantanu Narayen, CEO Adobe Systems
► Ajay Banga, President and CEO, MasterCard
► T K Kurien, CEO Wipro
► Karan Bilimoria, Chairman, Cobra Beer
► Talat Aziz, Ghazal Singer, composer
► Prem V. Watsa, CEO FairFax Financial
► Dr. Hari Prasad, CEO Apollo Hospitals
► Syed Akbaruddin, India’s representative to the UN
**TELANGANA ECOSYSTEM**

- **Incubator**
  - T-Hub
  - Domain Incubator
  - ITE&C

- **Funds**
  - T-Fund
  - TSFC
  - ITE&C + Industries

- **Skill**
  - TASK
  - Domain Skill
  - ITE&C + Education

- **Research**
  - TTRI
  - Research Institutes
  - ITE&C + Education + Science Tech + Industries

- **Prototyping**
  - T-Works
  - ITE&C + Industries

- **Production**
  - T-Prod
  - Industries

**Domains:**
- Skill
- Research
- Prototype
- Production

**Facilities:**
- VCs
- Patent Cell
- Telangana Technology Research Institute

**Decrease the barrier to:**
- Startup
- Access to Market
- Access to Mentors

- Access to Capital
- Access to Talent Pool
- Access to Workforce

- Access to Research
  - Access to IP Protection
  - Access to Small Production

- Decrease the barrier to Prototyping
  - Access to Large Production

**Target Enterprises:**
- 0-1
- 1-10
- 10-1000
THANK YOU