



**DEPARTMENT OF INDUSTRIAL POLICY AND PROMOTION
MINISTRY OF COMMERCE AND INDUSTRY
GOVERNMENT OF INDIA**

THE CHALLENGES

- " Grow at 10% for 3 decades*
- " Ease of doing business*
- " Making India a part of global supply chain*
- " Boosting domestic businesses*
- " Developing India to a manufacturing based economy*
- " Young India – skilling the nation and creating opportunities*
- " Making India hub for R&D*
- " Urbanization – a unique opportunity*



ADVANTAGE INDIA

GDP

3rd

Largest
size in GDP
(PPP)

\$ 8.6 Trillion

Growth Rate

7.6%

Fastest growing
Economy in the
World (2015-16)

Foreign
Reserves

\$366.7
Billion

Road network

2nd

Largest
In the world
33 Lakh KM

Internet
Users

462

Million
2nd largest
in the world

Population
between
age group
15 - 64

767
Million

Urban
Population

377

Million
30 people move
every minute to
urban areas

Railway network

2nd

Largest
23 Million
people travel
everyday



UNPARALLELED OPPORTUNITY

ECONOMIC

Huge Consumer Market

\$3.6 by 2025
(BCG Study)
Trillion

Substantial GDP Growth

\$20 by 2025
(PPP)
Trillion

SOCIAL

Youngest Nation

29 Average age
in 2025
Years

Upward mobility

150 more added
to middle
class by 2025
Million

Skilled work force

99% Literacy rate
by 2025

POLITICAL

Inclusion in Banking system

241 accounts
opened under
Banking for all
Million

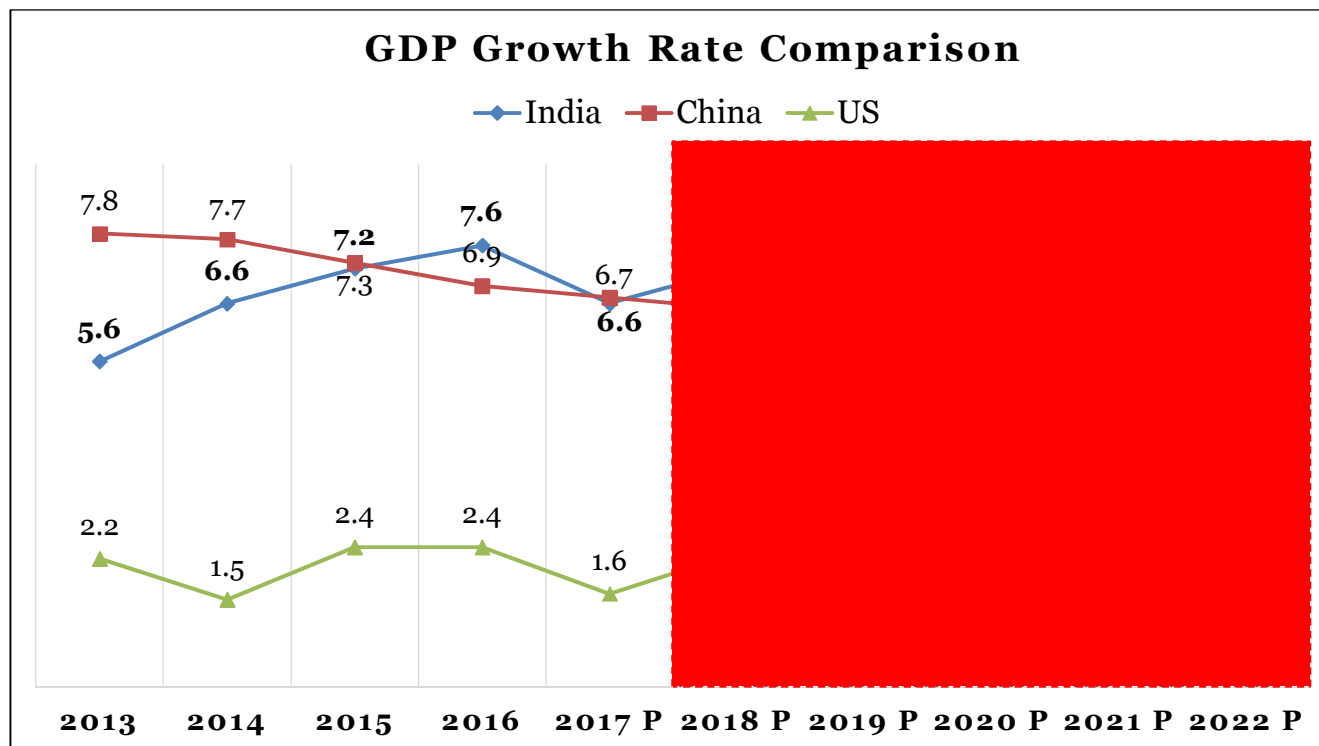
Deregulation

1000+ Archaic laws
repealed to
reduce red-tape



ADVANTAGE INDIA

Projections of a strong economic growth amongst global slowdown



" P = Projected

" Source: International Monetary Fund

India remains an ***oasis of growth*** amongst slowing global outlook

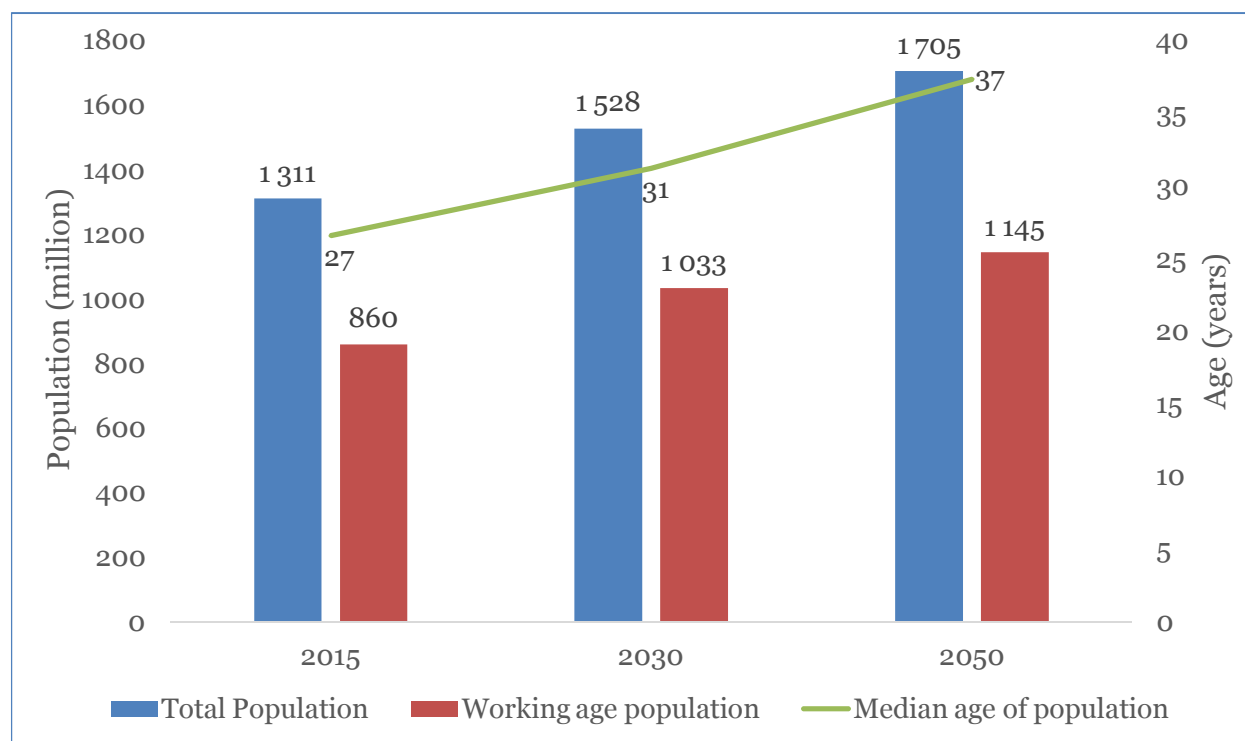
India is projected to be the fastest growing ***major economy in 2017*** surpassing ***China***

The trend is expected to continue at least ***till 2021***



ADVANTAGE INDIA

Promise of a strong consumer market combined with a large working population



Income levels is expected to **triple**
by 2025

Urban market shall account for
2/3rd of consumption growth
over the coming decade

Working population to increase by
33% to reach **1.14 billion by 2025**

India as a **“young nation”**, with
average **median age** shall be:
37.3 years by 2050

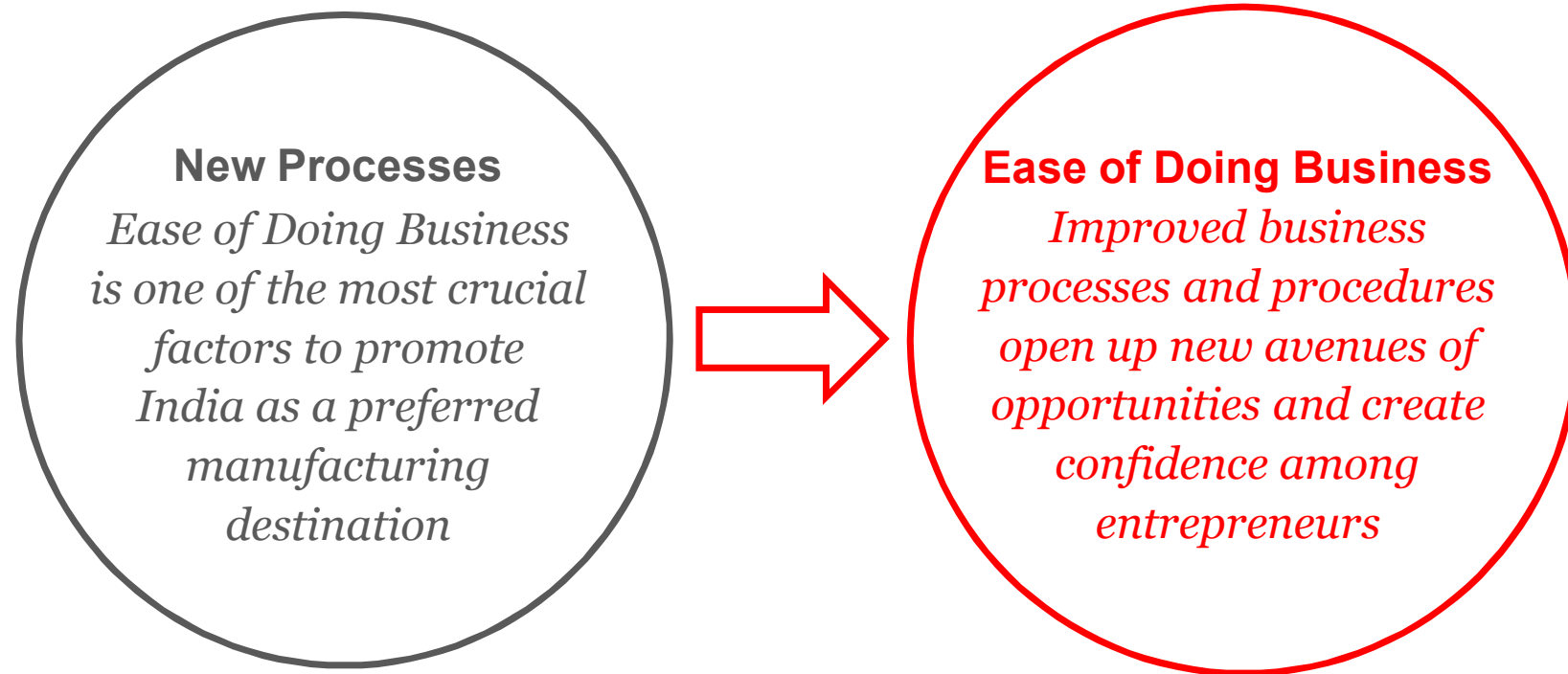
**Source: UNDP Asia Pacific Human Development Report 2016*



PILLARS OF NEW RESURGENT INDIA



MAKE IN INDIA INITIATIVE



EASE OF DOING BUSINESS

Emphasis of GoI on EoDB:

- *Make India the easiest and simplest place to do business*
- *Improvement, Simplification and Rationalization of existing rules and acts*
- *Introduction of IT for more efficient and effective governance*

EODB
Rankings

**Up 111
Places**

"Getting
Electricity"

Parameter of World
Bank's Doing Business
Report (2014-16)

Environmental
Clearance

Validity increased
from 3 to

7
years



EASE OF DOING BUSINESS

Single
Window
Clearance

Integrated
for

6

DEPARTMENTS

Customs

**24X7 custom
clearance at
19 PORTS
17 AIR CARGO
COMPLEXES**

Environmental
Clearance

Not required
for

**36 WHITE
INDUSTRIES**



EODB – STATE FOCUS

- “ States in India competing to become the most investment friendly destination in India
- “ 7124 EODB reforms implemented by 36 States & UTs

S. No.	Reform Category	Reforms taken by States (2015-16)	No. of States implementing the Reform
1.	Tax Reform	100% implementation	6 States
2.	Single Window System	Online system for filing of tax returns	13 States
		Single window for payments & approvals	16 States
		100% implementation of Single window system reforms	8 States
3.	Environmental Reform	100% implementation of EODB Environmental reforms	15 States
		Exemption of selected green/white industries from pollution board clearances	18 States



EODB – STATE FOCUS

S. No.	Reform Category	Reforms taken by States (2015-16)	No. of States implementing the Reform
4.	Post construction inspection	100% implementation in Inspection reforms	10 States
		Permission for joint-inspection under 10 Acts	18 States
5.	Building Plan Approval	Online system for automated building plan approvals	13 States
6.	Dispute Resolution	E-filing system for commercial disputes in District + Commercial courts	11 States
		Establishing specialized courts at District Court level to resolve commercial disputes	13 States



GST – GOODS & SERVICES TAX

What GST holds for the future

EODB

Removal of 17 indirect tax levies, thus reducing cascading effect of tax

Simplification of tax administration & compliance

More transparent Indirect Tax regime; increased tax collection

Removal of Inter-State tax levies

Inclusivity

Unorganized sector to come under the tax regime

Cost Advantages

Drop in costs of capital goods, lower inventory and working capital requirements

Seamless transfer of goods in the country : efficient & low cost logistics



DE-MONETIZATION

GDP Growth

Inclusion of informal economy to formal one

Rural economy and small scale sector to move to e-payments

Strengthening the Banking Structure

Banks to reduce interest rates and expand credit due to **higher liquidity available**

Formal payment structure for contract labors and daily wage earners

Boost to online/ e-transactions

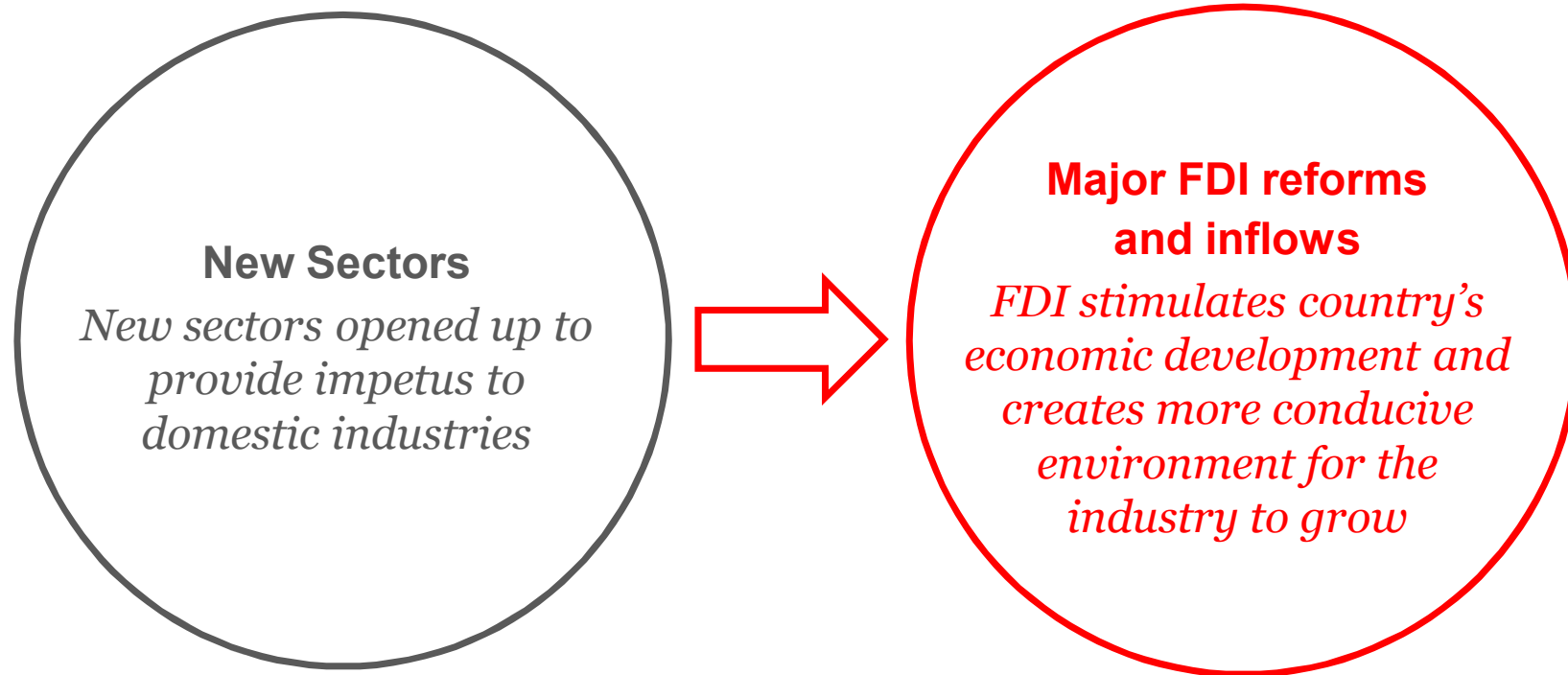
A boost to on-line/ formal businesses with elimination of ~~£~~Cash on Delivery model

Inclusivity

Increased banking penetration and financial inclusion



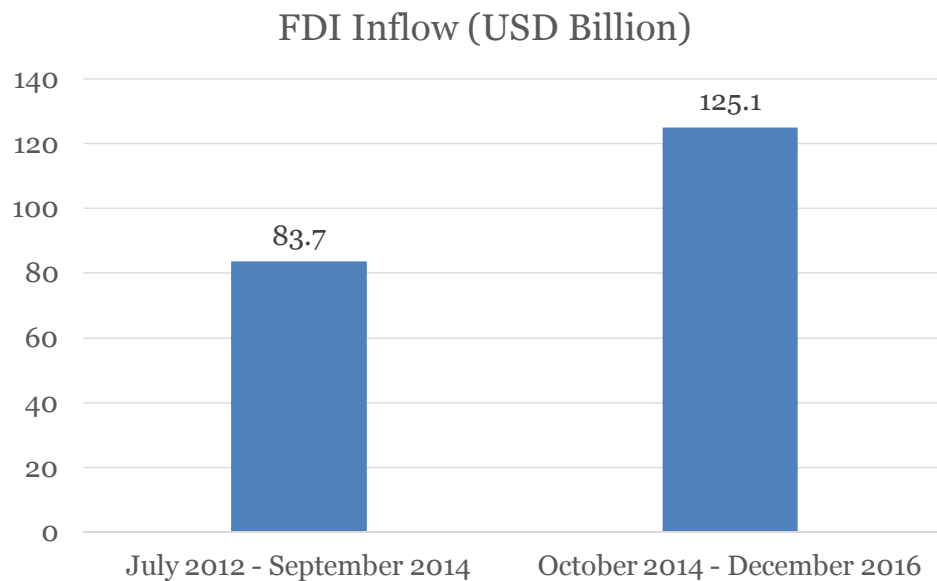
MAKE IN INDIA INITIATIVE



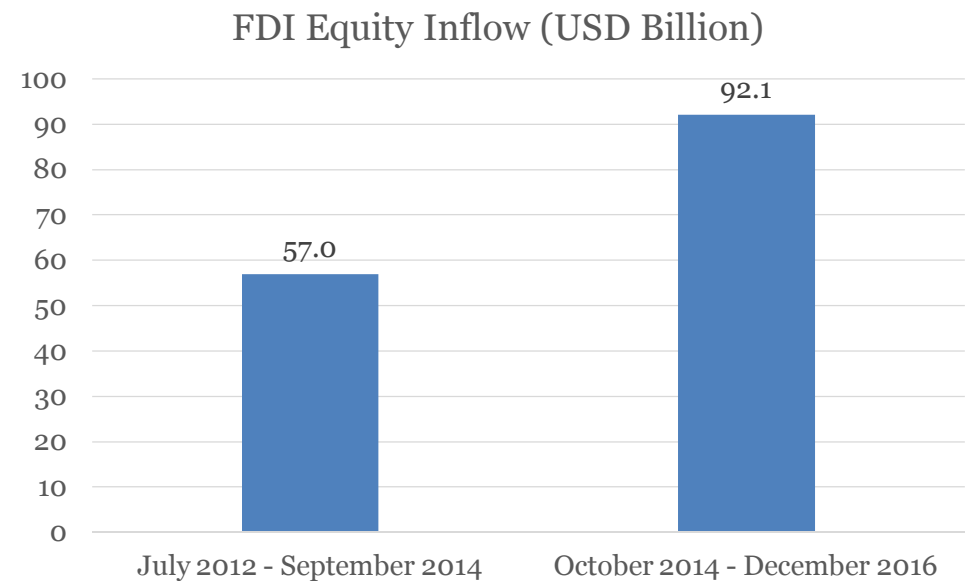
MAJOR FDI INFLOWS – MAKE IN INDIA IMPACT

Unprecedented growth in FDI inflows after launch of Make in India initiative

Growth of 49% in FDI Inflow



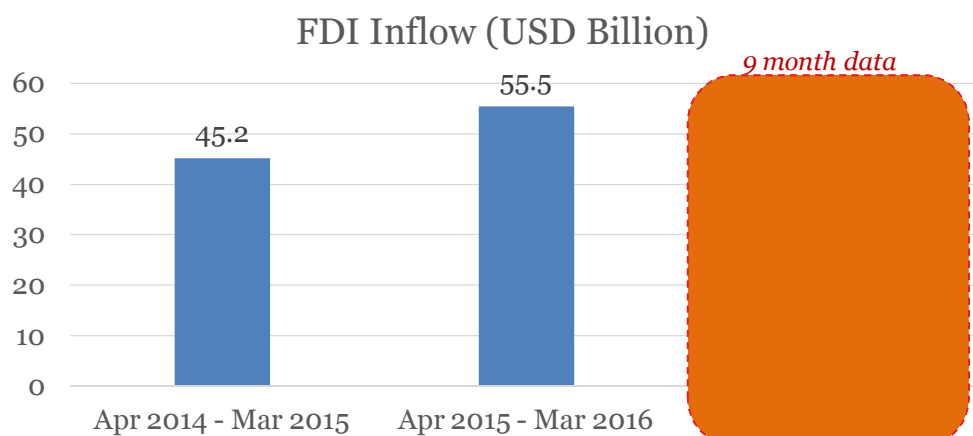
Growth of 62 % in FDI Equity Inflow



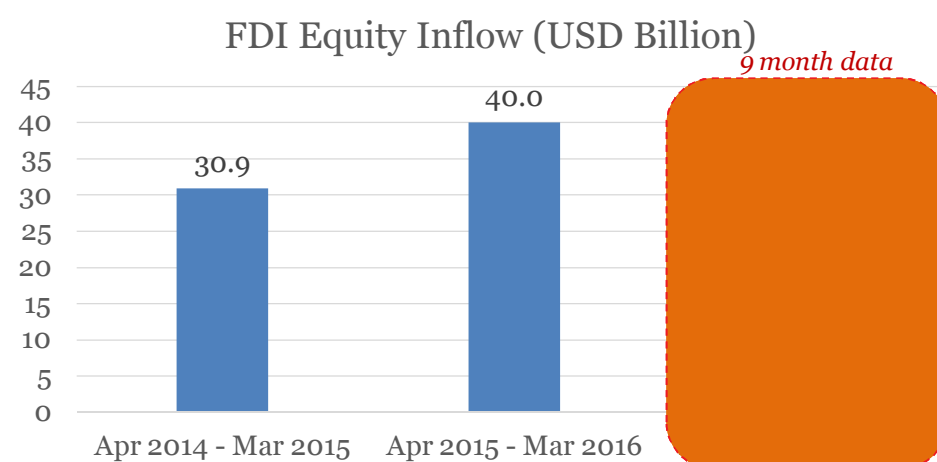
MAJOR FDI INFLOWS – YOY GROWTH

Year on Year growth showcasing strong fundamentals and increasing confidence of foreign investors

23% growth in FDI Inflow (Apr 2014 – Mar 2016)



30% growth in FDI Equity Inflow ((Apr 2014 – Mar 2016)



Highest ever FDI inflow for the last 2.5 years (USD 149 billion) – 31% of cumulative FDI inflow over past 17 years (USD 472 billion)



MAJOR FDI INFLOWS

Key FDI reforms cutting across the following sectors:



**Defence
Manufacturing**



**Food
Processing**



Telecommunication



Agriculture



Pharmaceutical



Civil Aviation



Space



**Private Security
Agencies**



Railways



Insurance & Pensions



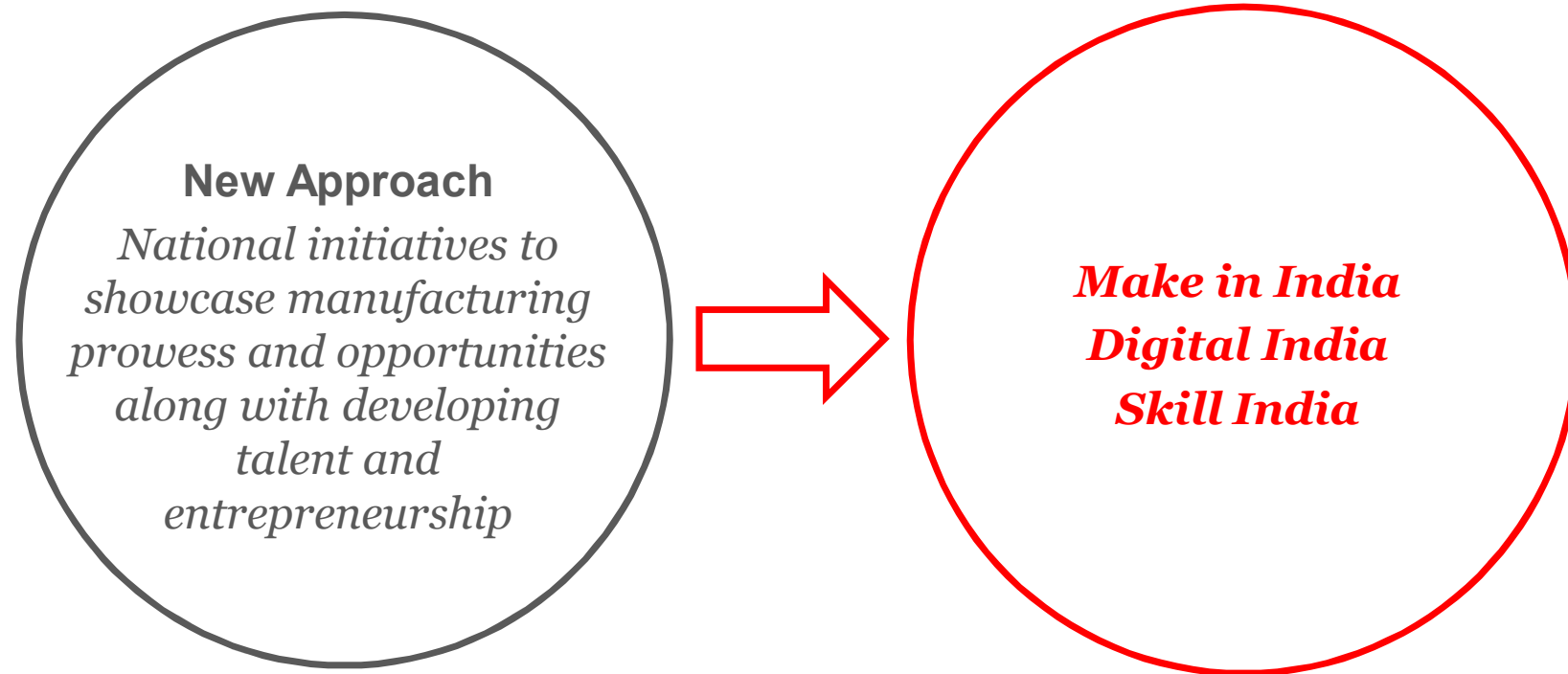
Medical Devices



Single Brand Retail



MAKE IN INDIA INITIATIVE

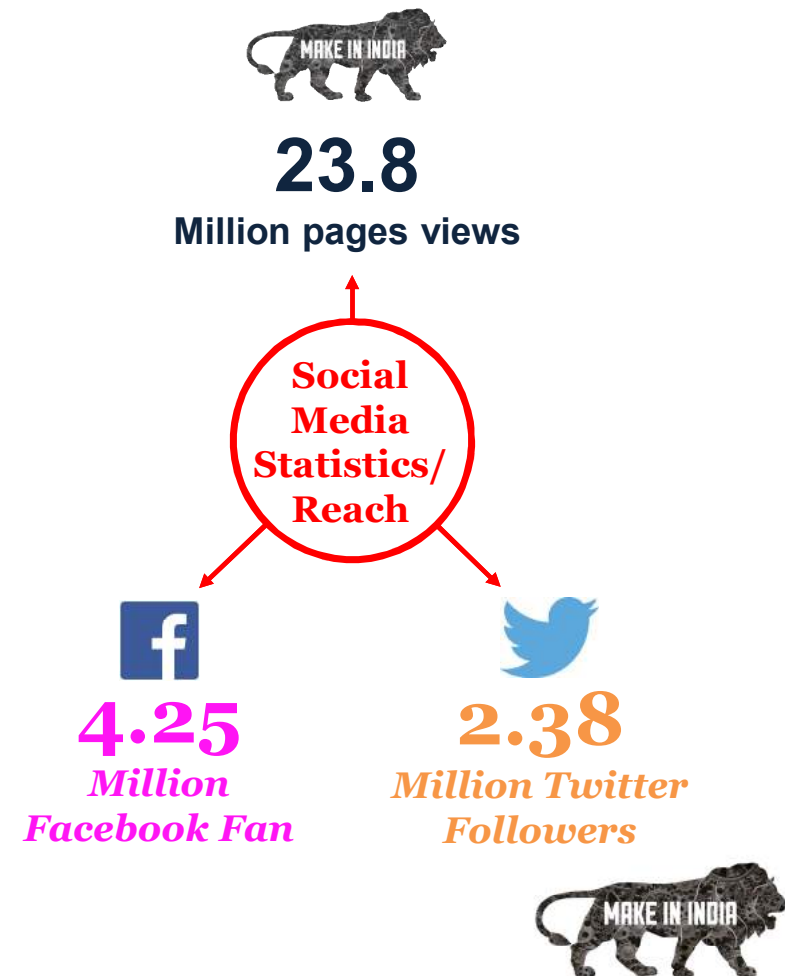


MAKE IN INDIA



Make in India has alleviated India as a manufacturing destination on the world stage. India has become 6th largest manufacturing country in the world from 9th after Make in India

Narendra Modi
Prime Minister of India



MAKE IN INDIA

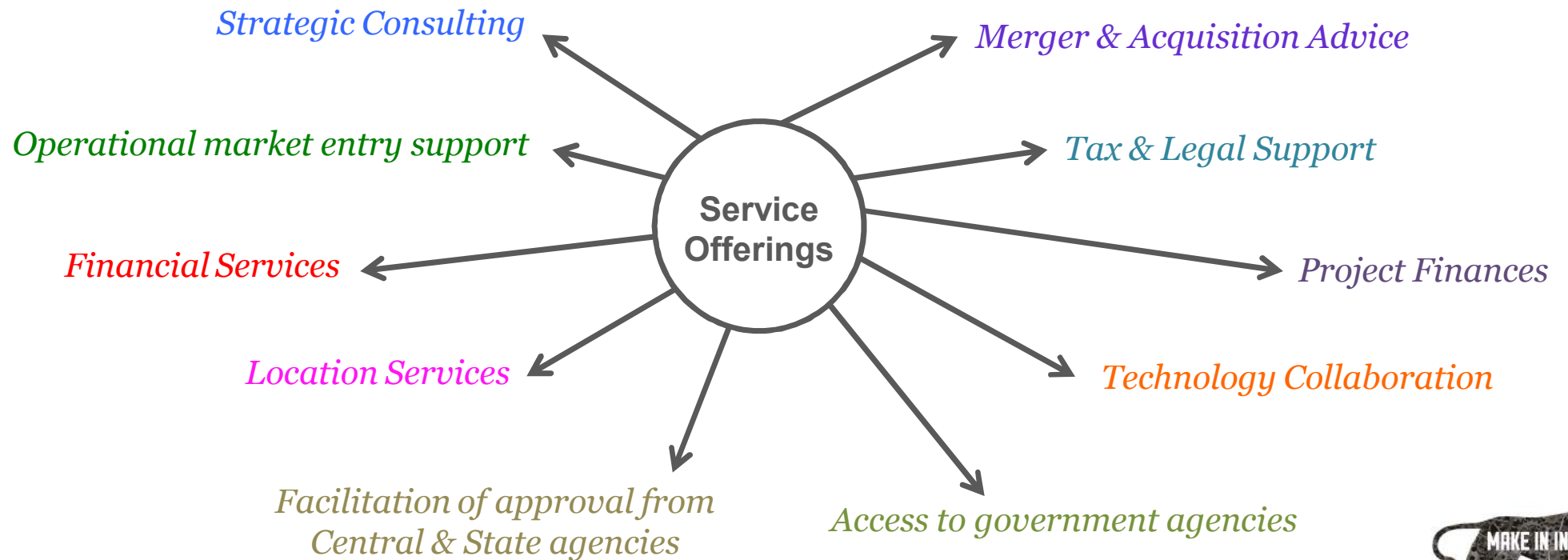
- Objective is to promote India as the most preferred global manufacturing destination
- MII Action Plan prepared in 2014 for **21 focus sectors** drawn in consultation with state governments, union ministries and industry stakeholders
- Under the MII Action Plan, a total of **57 short term Action Plans & 65 Medium Term action plans** were formulated
- **73% implementation** has been achieved for short term action **34% implementation** for medium term



MAKE IN INDIA

Taking MII to Global Arena - Make in India Mittelstand (MIIM)

Another milestone in improving the 'Ease of Doing Business' in India. Designed to attract more German companies to India by making the market entry of Mittelstand companies a smooth process. This will be replicated across other identified countries



MAKE IN INDIA MITTELSTAND (MIIM) Taking MII to Global Arena

Report Card: Sept. 2015 – Feb 2017

%Mittelstand companies approached+to the MIIM programme	#304
%Companies expressed interest+to join the programme	#75
%Personal meetings conducted+by MIIM team to evaluate %it for MIIM+	#75
%Enrolled as official members of MIIM programme+	#66
%Advanced stage of investment implementation”	#40



**Make In India Business Support Programme for
German Mittelstand and Family Owned Enterprises**



DIGITAL INDIA

Digital India strengthening the Make in India Vision

Ease of Doing Business

Enabling real time availability of services in online & mobile platform

Transformed action of services through digitization for improving Ease of Doing Business

Electronics & Cashless financial transactions

Job Creation

17 million direct jobs and atleast 85 million indirect jobs

Electronics Manufacturing

Net zero imports in electronics by 2020



SKILL INDIA

Skill India – Developing skill-sets for developing India

Provide meaningful, industry relevant and skill based training to over 400 million people



Skill India
कौशल भारत - कुशल भारत

- “ Number of trained Indian growing by 36.8%
- “ 18 lakh candidates have been trained, 40% have been trained for Manufacturing roles
- “ ITIs in the country has increased from 10,750 in May 2014 to over 13,105 in May 2016
- “ 8 new Regional Vocational Training Institutes (RVTIs) for women opened
- “ Under "Indian Leather Development Programme" 343311 persons have been trained in 2014-16 compared to 96171 trained during 2012-14.



JAM TRINITY

Using technology to leapfrog – JAM trinity



Jan Dhan

Integrated approach to bring financial inclusion of all citizens

~219 million accounts opened so far



Aadhaar

Unique identity to every resident citizen

1 billion enrollments under Aadhaar scheme



Mobile

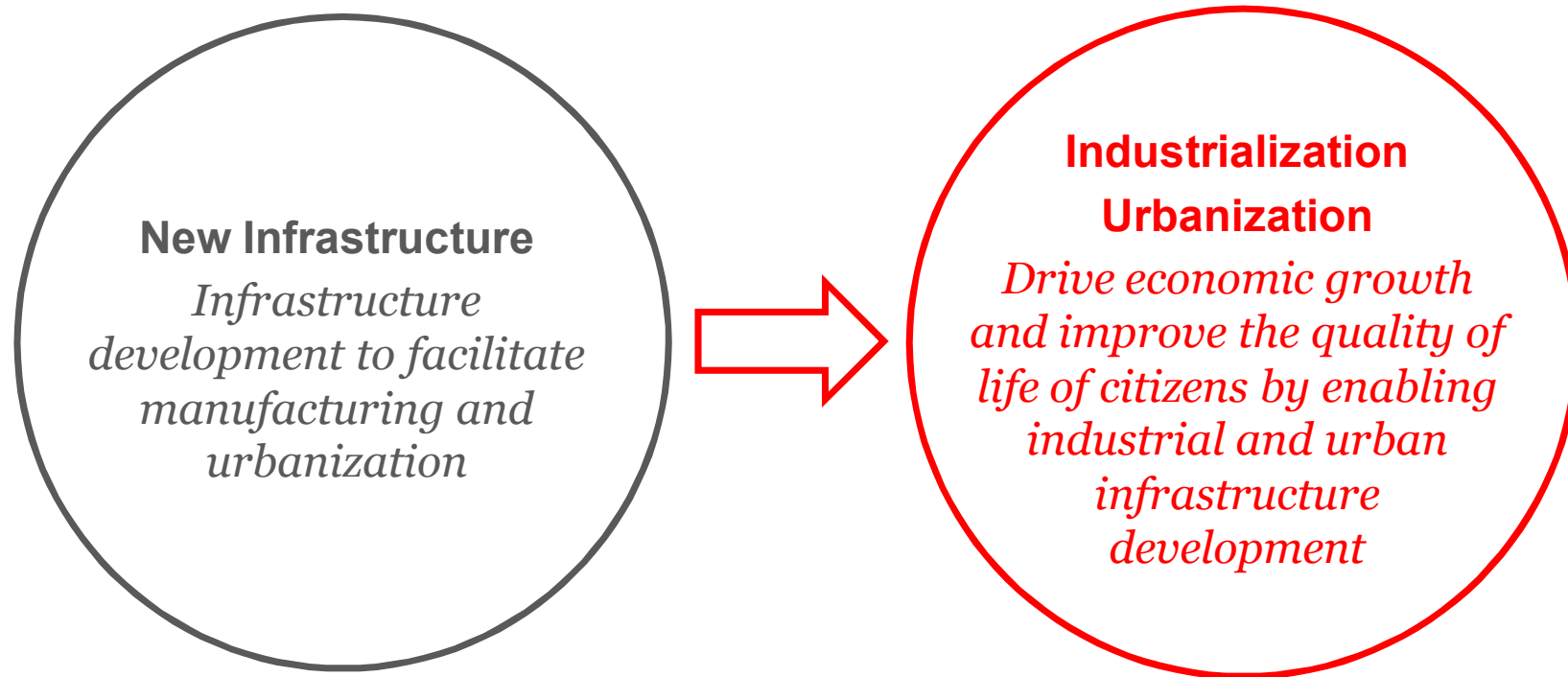
Indian market is the second largest in the world

More than 1 billion mobile subscribers

Inclusivity, banking for all, connectivity for all; 3 pillars to Create Huge Demand, Motivate Investment, Manufacturing and Economic Growth to achieve the MII vision

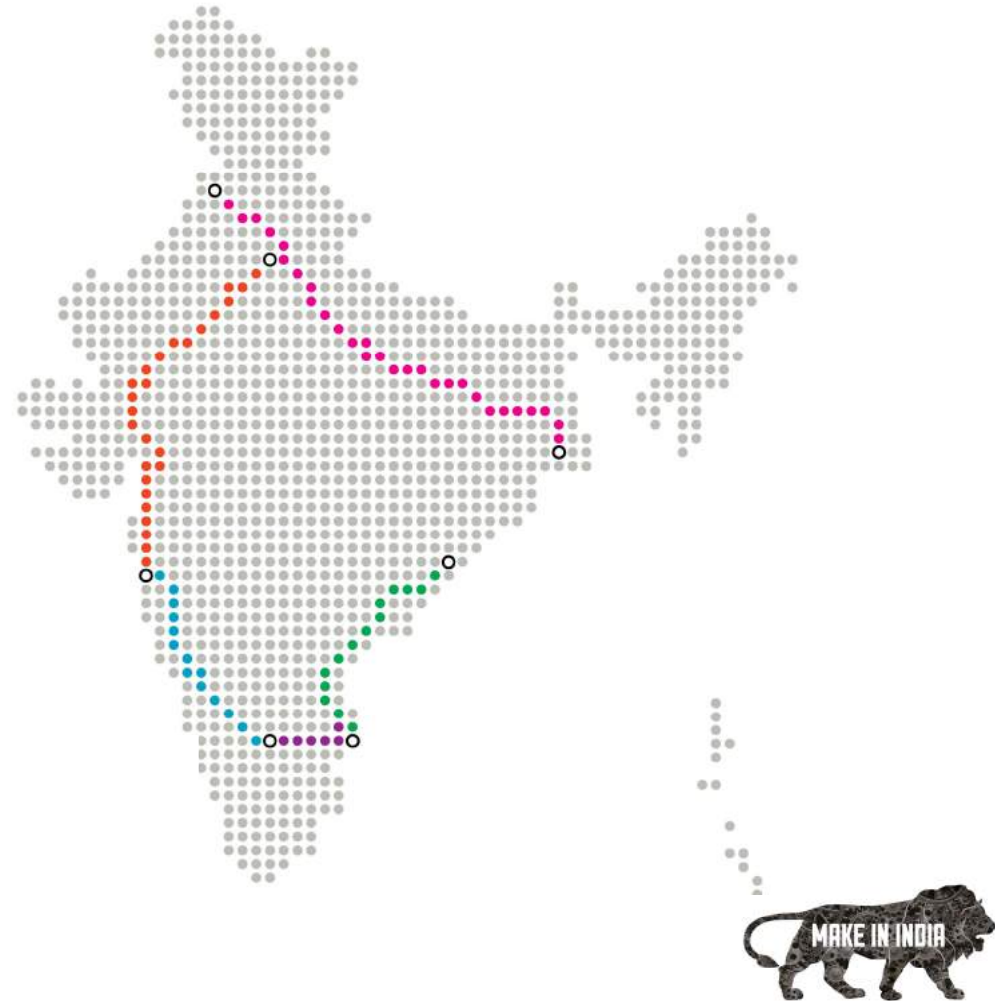


MAKE IN INDIA INITIATIVE



INDUSTRIAL CORRIDORS

- *Delhi-Mumbai Industrial Corridor (DMIC)*
- *Chennai-Bengaluru Industrial Corridor (CBIC)*
- *Bengaluru-Mumbai Economic Corridor (BMEC)*
- *Vizag-Chennai Industrial Corridor (VCIC)*
- *Amritsar Kolkata Industrial Corridor (AKIC)*



INDUSTRIAL CORRIDORS – INDIA'S NEW INVESTMENT DESTINATIONS

Industrial corridors present numerous advantages as investment destinations for driving investments across industrial, physical, urban and social infrastructure:



DELHI MUMBAI INDUSTRIAL CORRIDOR (DMIC)

Will reduce the transportation time of goods from **14 days** to **14 hours**

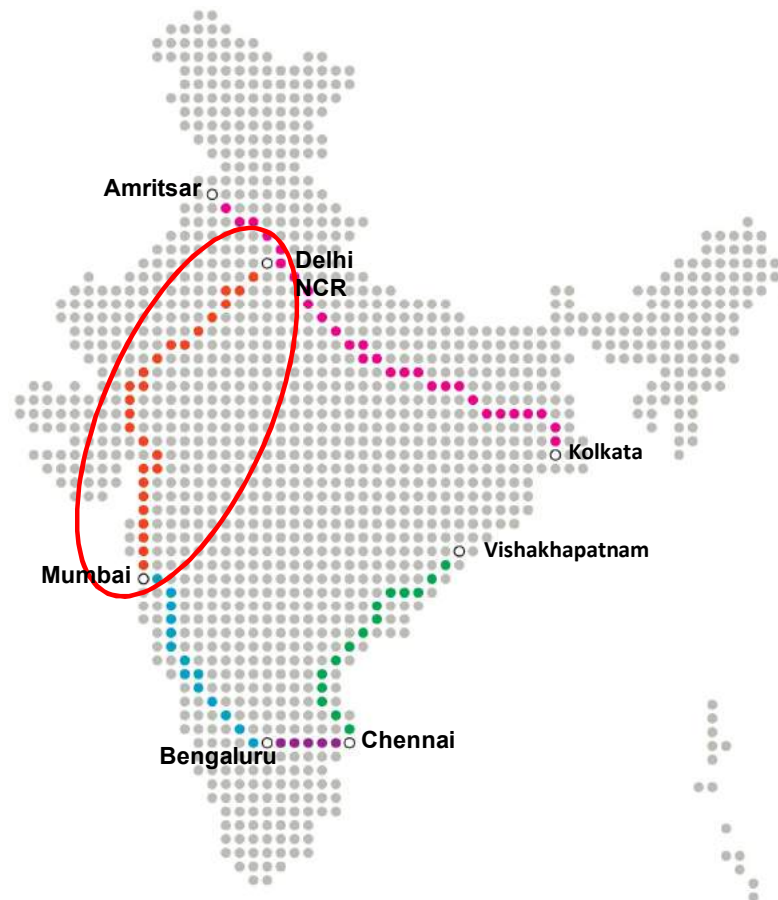
Estimated Investment: **\$100 Billion**

Dedicated Freight Corridor (DFC) of **1504 km** as the backbone

Intersects 7 states namely Delhi, Uttar Pradesh, Haryana, Rajasthan, Madhya Pradesh, Gujarat and Maharashtra

24 Investment Regions/Industrial Areas will be developed

Develop 8 sustainable industrial cities with world class infrastructure



INTERNATIONAL AVIATION HUB



RAILWAY STATION



MULTI-MODAL LOGISTICS HUB



WASTE WATER RECYCLING



POWER PLANT



ROAD LINK PROJECTS



KNOWLEDGE CITY



EXHIBITION CUM CONVENTION CENTRE



WATER SUPPLY



SOLAR POWER PROJECTS

24

Investment Regions/
Industrial Areas

8

Smart
Cities

2

Airports

5

Power
Projects

2

MRTS
Projects

2

Logistic Hubs



4 DMIC CITIES – ADVANCED STAGE

Dholera, Gujarat – 22.5 sq kms

Shendra, Maharashtra – 8.39 sq kms (1st phase)

Integrated Township, Greater Noida, Uttar Pradesh – 747.5 acres

Vikram Udyogpuri, Ujjain, Madhya Pradesh – 1100 acres

- “ *Environment Clearance obtained*
- “ *Construction of trunk infrastructure works begun*
- “ *Skilled manpower available in close vicinity*
- “ *Excellent Connectivity – Road, Rail etc.*
- “ *Land ready for allotment*
- “ *Contiguous land parcels across different land uses*

Trunk Infrastructure for all the mentioned cities to be completed by 2019



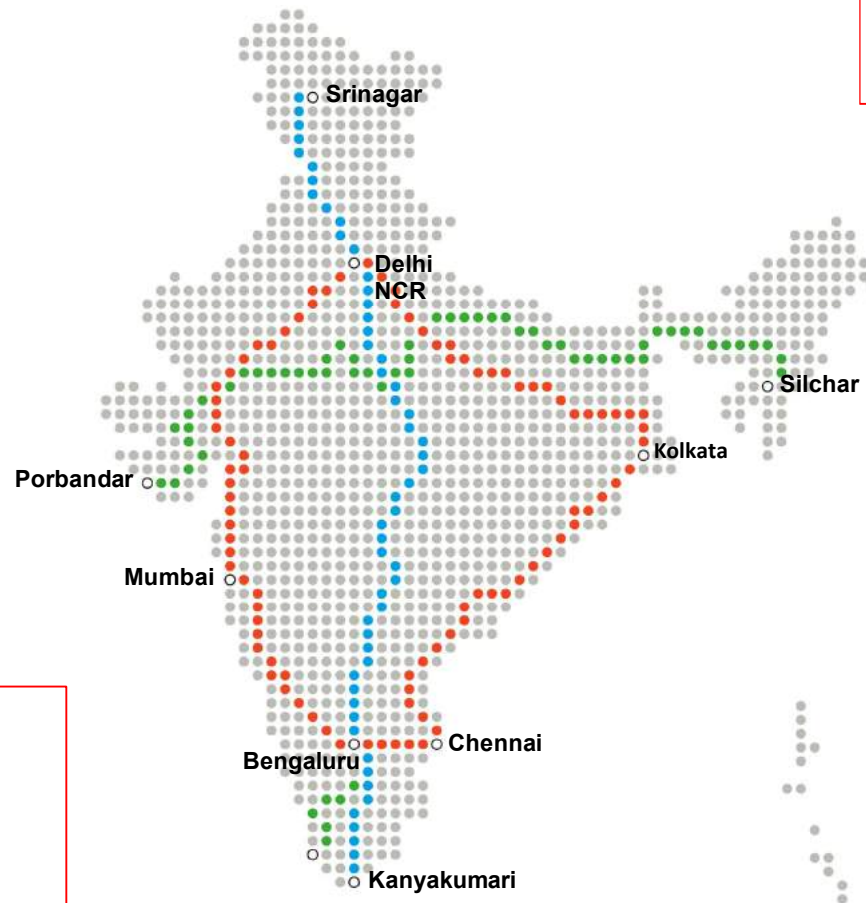
ROADS

Doubling of network of highways by 2020

22 kms of highways being constructed everyday

7660 km of National Highways/ Expressways constructed (2014-16)

100% FDI allowed



RAILWAYS

Opportunity

400 Railway Stations

Passenger Amenities

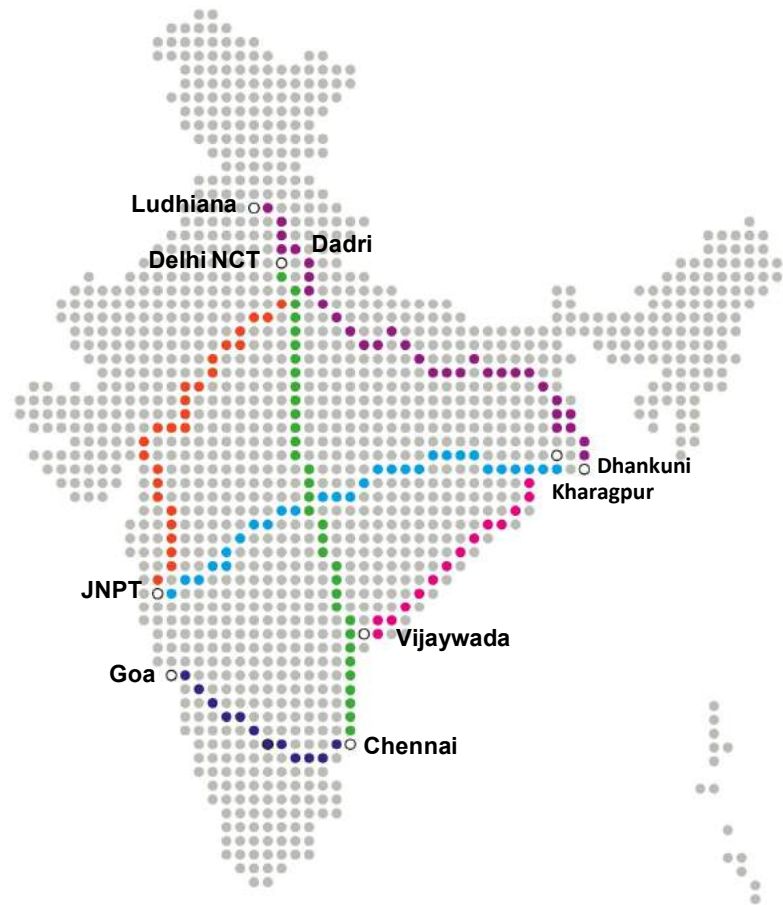
**Modernisation of
Rolling Stock**

High speed railways

Signalling Systems

**Track construction
along DFC**

Port-Mine connectivity



Under Implementation

- Eastern DFC 1,840 km
- Western DFC 1,504 km

EDFC and WDFC will
be completed by
2019

Planning Stage

- North-South DFC 2,343 km
- East-West DFC 2,330 km
- East Coast DFC 1,100 km

Approved

- Southern DFC 899 km



PORTS & INLAND WATERWAYS SAGARMALA

\$150 Billion opportunity

7 Greenfield major ports

44 capacity enhancement projects

80+ Port connectivity Projects

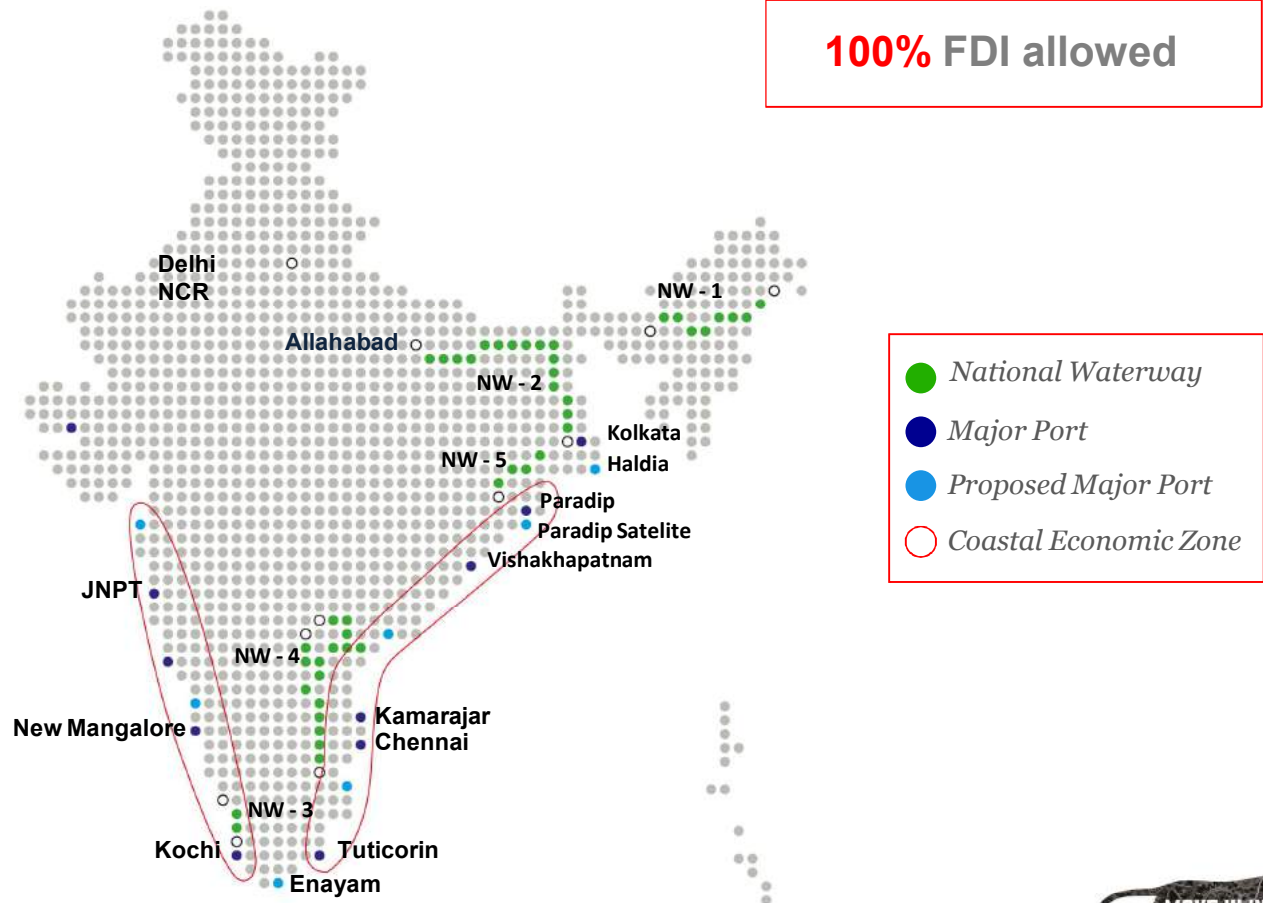
7-8 new dry ports

Coastal & ILW Projects

12 Major Ports, **200** other Ports,
and **5** waterways

Key private sectors ports Mundra,
Pipavav, Krishnapatnam

100% FDI allowed



AVIATION

\$80 Billion opportunity

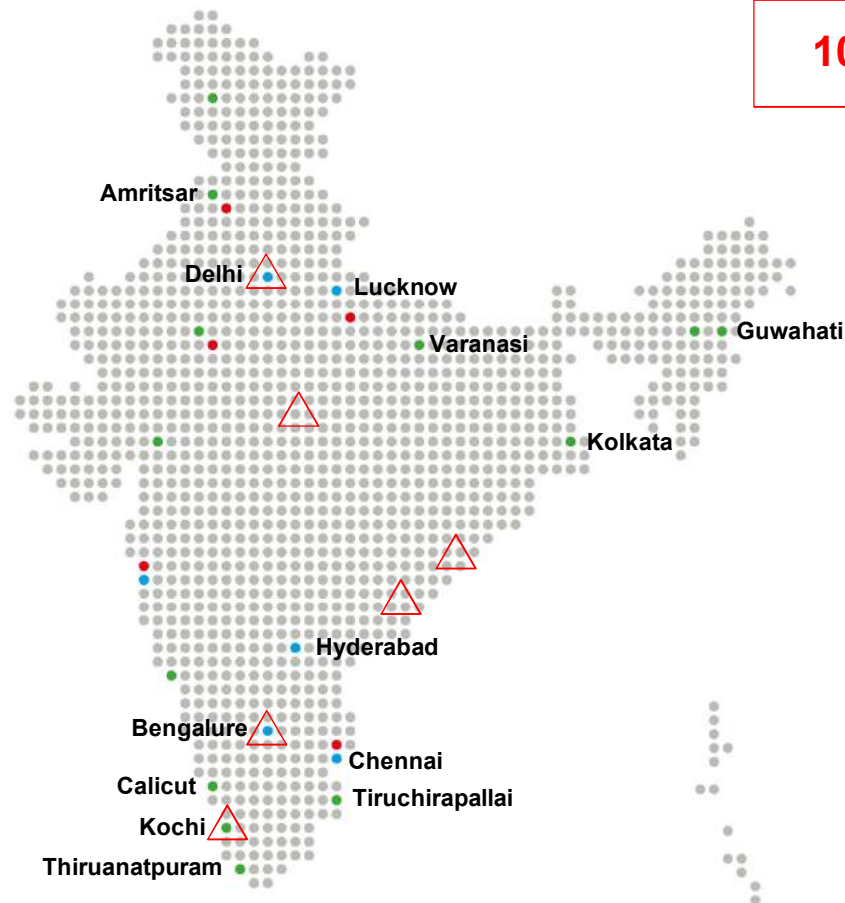
3rd Largest market by 2030

8.6% International
Traffic Growth

24.6% Domestic
Traffic Growth

250 Airports

100% FDI allowed



- Major Airports
- International Airports
- Ongoing Projects
- △ Aerospace Clusters



SMART CITIES

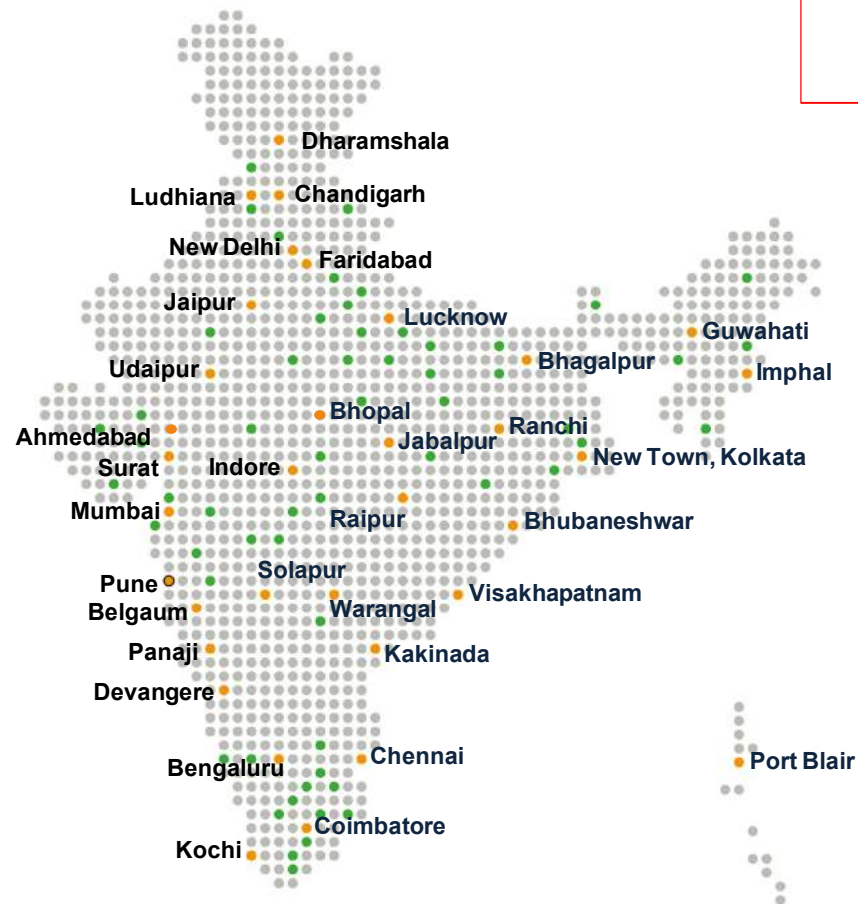
\$111 Billion opportunity

98 *Smart Cities by 2020*
Traffic Management Systems

33 *Cities already shortlisted*
for Design & Construction

\$15 *Billion budgetary*
support over next 4 years for
Sewerage systems & Waste
Management

100% FDI allowed



● Greenfield Cities
● Brownfield Cities



FOCUS ON AFFORDABLE HOUSING

AMRUT (Atal Mission For Rejuvenation And Urban Transformation)

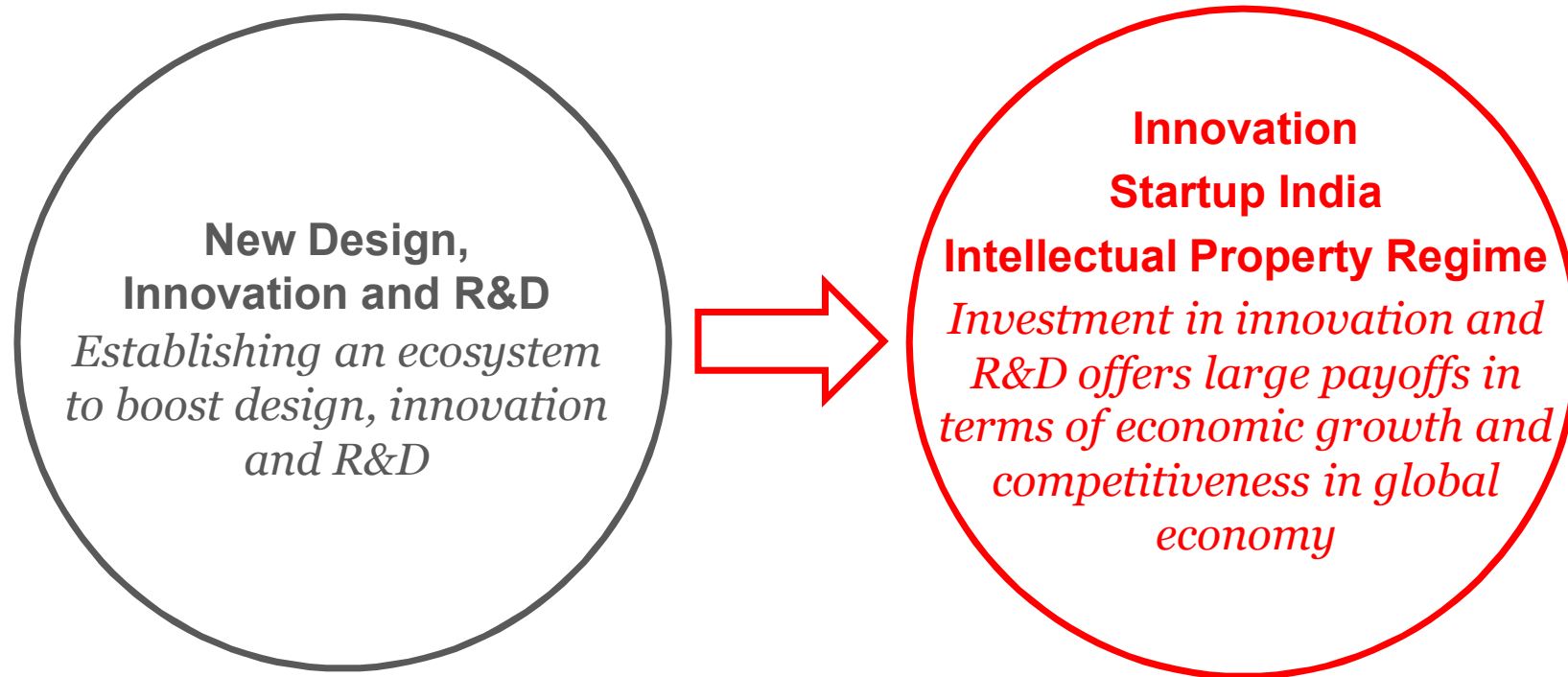
- “ Aims to recast urban landscape with capital outlay of **USD 7.5 Billion**
- “ Retrofitting works to be undertaken in 500 cities

PMAY (Pradhan Mantri Awas Yojana)

- “ Primary aim is to ensure building **20 millions houses** by 2022
- “ In Phase I, 100 cities are to be taken up



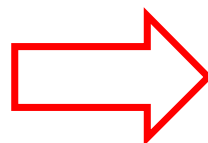
MAKE IN INDIA INITIATIVE



STARTUP INDIA

" 3rd largest Start-Up Ecosystem globally

" 3-4 Start-Ups are born every day

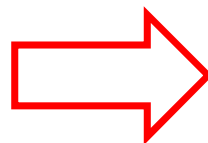


MORE THAN 20,000 STARTUPS

" Median age of a founder is 31 years

" 12 Indian Start-Ups in Billion Dollar Club

" 55% of Youth would prefer to work for a Start-Up over corporates in 2016

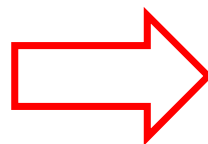


"START-UP WAVE" HAS CAPTURED THE IMAGINATION OF THE YOUTH

" Tech Startups are expected to be 11,500 in 2020 from 4,300 in 2015

" Number of incubators has grown by 40% to 140 during 2015-16

" 15-20% growth in the number of active Angel & VC investors in 2016



530+ ACTIVE INVESTORS HAVE EMERGED FOR THE STARTUP SPACE

**TOTAL FUNDING AT USD 3.8 – 4.0 BILLION
NO. OF DEALS UP BY 6-10% IN 2016**

STREAMLINING OF IP PROCESSES

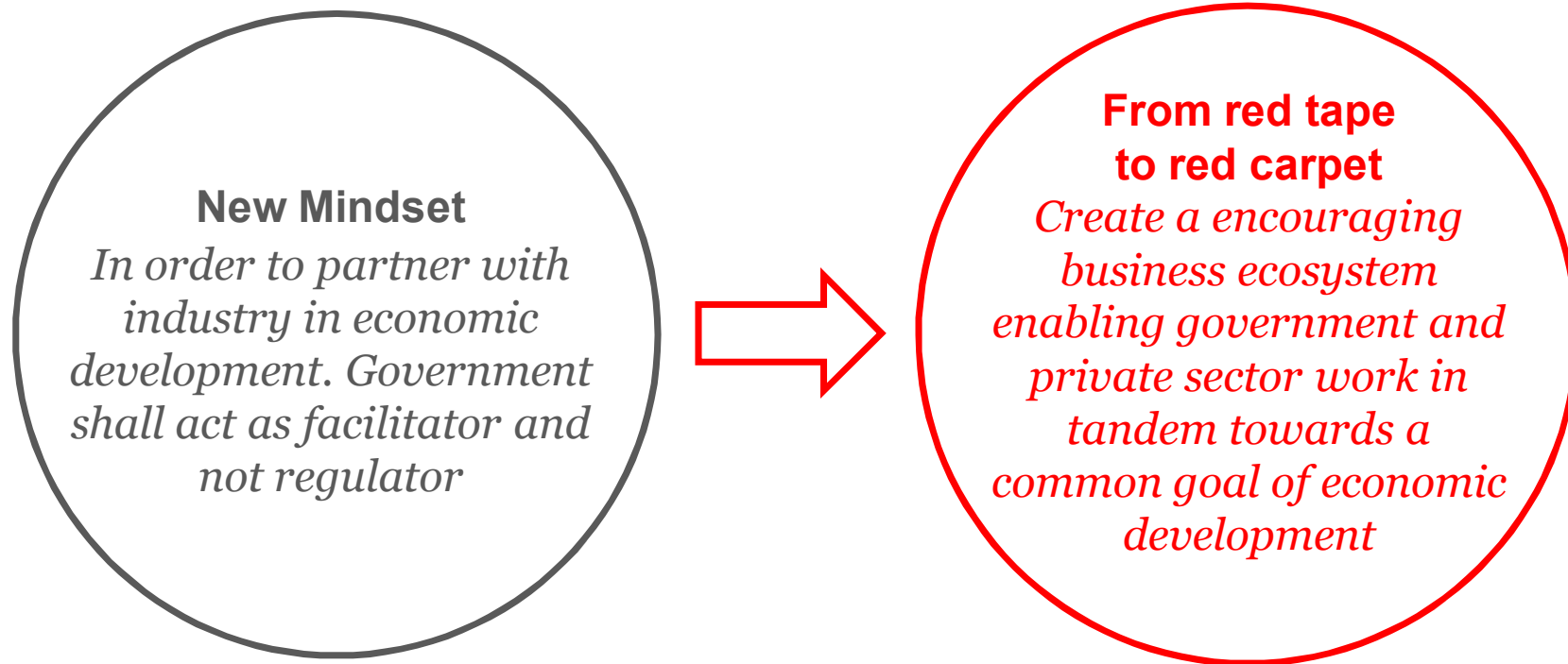
Manpower augmentation in IP offices - 459 new Patent Examiners selected in addition to existing 130; 296 have started actual examination work

Clearing Backlog/ Reducing Pendency

- “ Trademarks examination up 2 ½ times this F.Y. as against last year till January
- “ Pendency in Trademark examination brought down from 13 months to 1 month, much earlier than the target date of March 2017
- “ Pendency in Patent examination is targeted to be brought down from the present 5 to 7 years to 18 months by 2018-19



MAKE IN INDIA INITIATIVE



INVESTMENT FACILITATION – INVEST INDIA

World's #1 Investment Promotion Agency (UNCTAD, 2016)



61,523 Queries responded

From **119 Countries** and **34** States and UTs

Across **43** Sectors

Efficient response time:

92% < 72 hours, **78%** 24 hours

US\$ 60.65 billion Investment commitments being facilitated

US\$ 3.1 billion Investments received facilitated

1,725,525 Jobs committed

286,946 Jobs provided



**1ST AMONG THE
TOP 10 FDI
DESTINATIONS**

Source: UNCTAD

**1ST AMONG
THE WORLD'S
FASTEST
GROWING
ECONOMIES
IN BOTH 2016
& 2017**

Source: IMF & UN

**1ST AMONG THE
WORLD'S BEST
COUNTRIES TO
INVEST IN**

Source: U.S. News, BAV
Consulting & Wharton School

**1ST AMONG THE
WORLD'S MOST
ATTRACTIVE
INVESTMENT
DESTINATIONS**

Source: Ernst & Young

**1ST AMONG THE
WORLD'S
TOPMOST
GREENFIELD FDI
DESTINATIONS**

Source: Financial Times, 2015

**1ST AMONG 100
COUNTRIES ON
THE GROWTH,
INNOVATION AND
LEADERSHIP
INDEX**

Source: Frost & Sullivan

**1ST AMONG 110
INVESTMENT
DESTINATIONS
POLLED
GLOBALLY**

Source: Foreign Policy Magazine

**1ST CHOICE FOR
TECH MNCs
TO SET UP
R&D CENTRES
OUTSIDE
THEIR HOME
COUNTRIES**

Source: Zinnov Management
Consulting



**6TH
LARGEST
MANUFACTURING
NATION IN THE
WORLD**

Source: UNIDO

**7TH
MOST VALUED
NATION BRAND
IN THE WORLD**

Source: Brand Finance

**UP
15 PLACES
ON THE GLOBAL
INNOVATION INDEX**

Source: WIPO, 2016

**UP
19 PLACES
ON THE LOGISTICS
PERFORMANCE INDEX**

Source: World Bank, 2016

**UP
32 PLACES ON THE GLOBAL
COMPETITIVENESS INDEX**

Source: World Bank, 2014-16

**62%
GROWTH IN FDI EQUITY
INFLOWS 2014-2016**

Source: Department of Industrial Policy
& Promotion, Government of India

**USD
149
BILLION
INDIA'S HIGHEST EVER
RECORDED FDI INFLOW
[APRIL 2014- NOVEMBER 2016]**

Source: Department of Industrial Policy
& Promotion, Government of India

