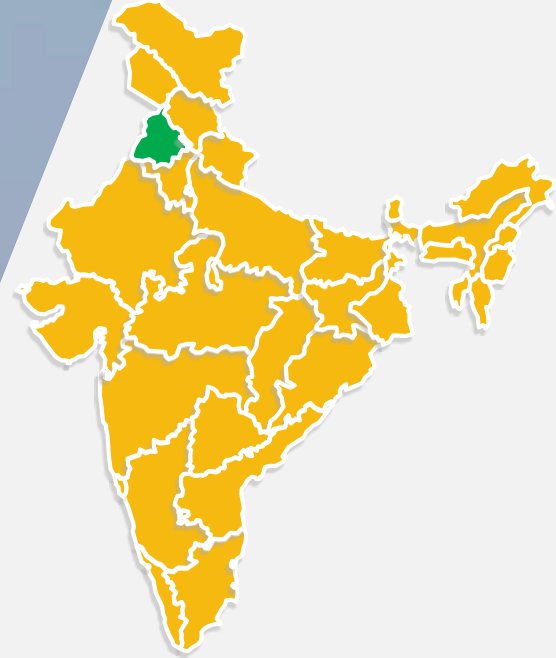




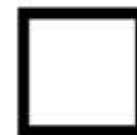
**PUNJAB**

**LAND OF FIVE RIVERS**



# Table of Content

▶ Executive Summary .....	3
▶ Introduction .....	4
▶ Economic Snapshot .....	9
▶ Physical Infrastructure .....	15
▶ Social Infrastructure .....	22
▶ Industrial Infrastructure .....	25
▶ Key Sectors .....	29
▶ Key Procedures & Policies.....	38
▶ Annexure.....	50



## Textile hub

- Punjab has emerged as a key hub for textile-based industries including yarn, readymade garments & hosiery. With the development of apparel parks, favourable textile policies & other incentives for the creation of textile infrastructure, the state offers opportunities for investment.
- State is the source of 95 per cent of India's Woollen Knitwear production, 85 per cent of India's sewing machine production and 75 per cent of India's sports goods production.

## Good infrastructure facilities

- Punjab has been ranked first in India in terms of infrastructure facilities offered.
- Punjab's road, rail & air transport network, connectivity, construction of bridges & infrastructure facilities are among the best.

## Strong agriculture production

- Punjab has a strong agriculture base with the huge production of principal crops such as rice, maize, sugarcane & barley.
- Total food grain production in the state in 2018-19 is estimated at 30.45 million metric tonnes.

## Increased focus on renewable energy

- The state government of Punjab is increasing its focus on using renewable sources of energy.
- By 2022, the state has to achieve 4,772 MW of capacity from solar power, 50 MW from small hydro projects and 244 MW from biomass.
- The total investment potential for renewable energy is expected to reach US\$ 6 billion by 2022.

*Source: Department of Agriculture, Government of Punjab, Central Electricity Authority, As per Punjab Investor Summit 2015, Punjab Economic Survey 2017-18, MNRE*

# INTRODUCTION



- The state is bordered by the Pakistani province of Punjab to its west, Jammu & Kashmir in the north, Himachal Pradesh in the northeast, Haryana in the south and southeast, and Rajasthan in the southwest.
- The most commonly spoken language of the state is Punjabi. Hindi and English are the other widely used languages.
- Amritsar, Ludhiana, Jalandhar, Bhatinda, Mohali, Pathankot and Patiala are some of the major cities in the state.
- The state has three major seasons – summer (April-June), rainy season (July-September) and winter (October-March). Due to the presence of large rivers, most of the state is a fertile plain. The state has three major rivers flowing through it: Ravi, Beas and Satluj.

Parameters	Punjab
Capital	Chandigarh
Geographical area (lakh sq. km)	50,362
Administrative districts (No)	22
Population density (persons per sq. km)	550
Total population (million)	27.7
Male population (million)	14.6
Female population (million)	13.1
Sex ratio (females per 1,000 males)	893
Literacy rate (%)	76.7



Source: Government of Punjab, Census 2011, MapsofIndia

## Fertile and productive land

- The confluence of five rivers makes Punjab's agricultural land rich and productive. Approximately 82 per cent of the state's land is under cultivation compared with the national average of 40 per cent.
- Punjab is one of the largest wheat and rice producers in India. It is also a leading exporter of rice, including the well-known Basmati variety.

## Policy and fiscal incentives

- Punjab offers industries with a wide range of fiscal and policy incentives under the Industrial and Business Development Policy, 2017.
- In order to improve the current cropping pattern and restructure the incentives, the state government introduced Agriculture Policy for Punjab 2013.

## Advantage Punjab

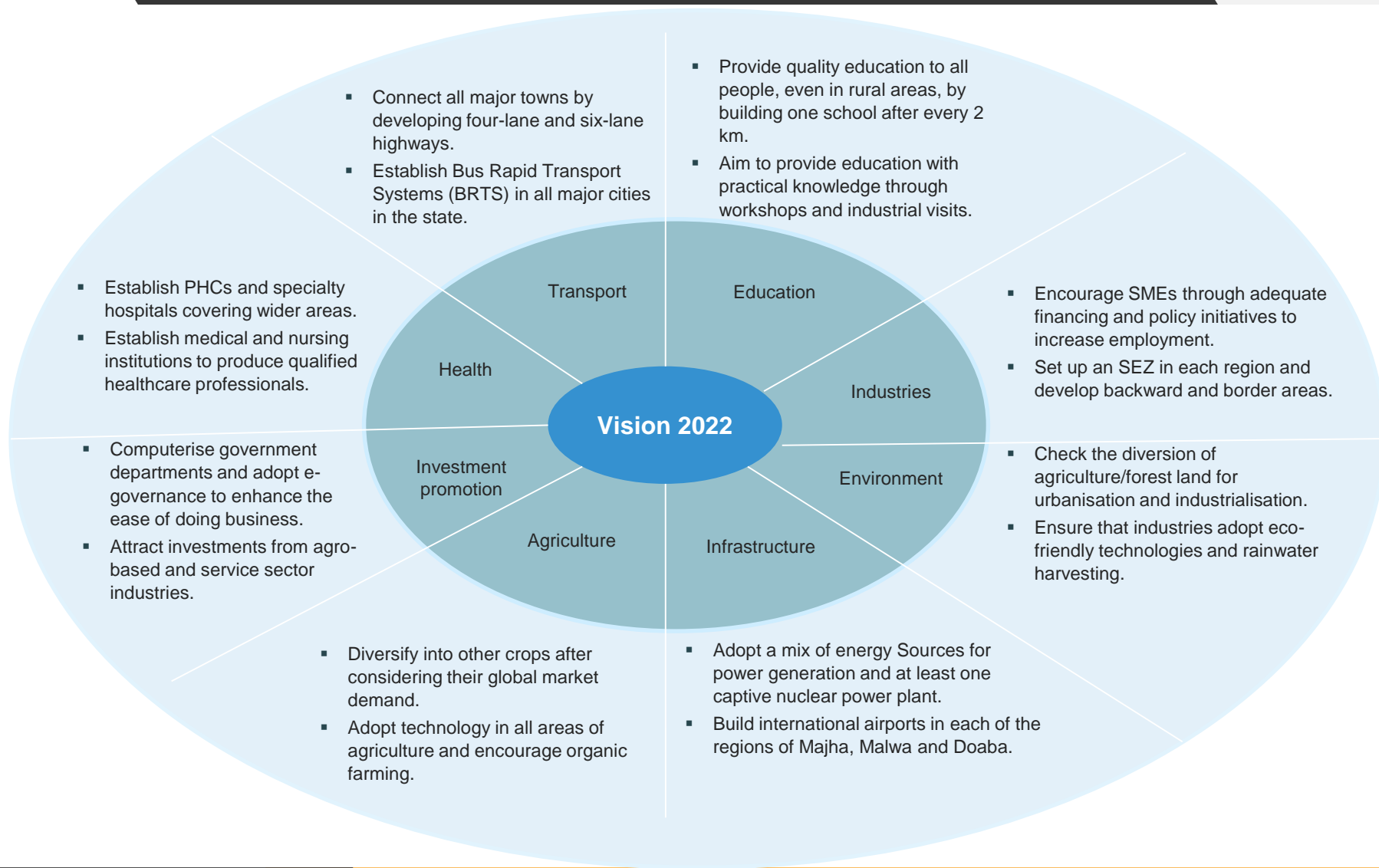
## High economic growth

- The state's GSDP (in Rs) grew at a compound annual growth rate (CAGR) of 9.97 per cent between 2011-12 and 2018-19.
- The state provides investment opportunities in sectors such as textiles, agro-based industries, IT & ITeS, automotive and auto components, sports goods and light engineering goods.

## Strong infrastructure

- Punjab has a well developed social and industrial infrastructure. Its transport network is one of the best in India, with easy access to key markets such as the Delhi-NCR region.
- Punjab has witnessed impressive growth in the number of clusters and hubs, with the establishment of several PPPs.

Source: Punjab economic survey 2017-18, Department Of Industries & Commerce



## Punjab's Contribution to Indian Economy (2018-19)

Parameter	Punjab	India
GSDP as a percentage of all states' GSDP	2.72	100.0
GSDP growth rate* (%)	8.99	11.50
Per capita GSDP (US\$)	2,346.03	1,982.65

## Social Indicators

Parameter	Punjab	India
Literacy rate (%)	76.7	73.0
Birth rate (per 1,000 population) (2017)	14.9	20.4

## Industrial Infrastructure

Parameter	Punjab	India
Number of PPP projects (No) (December 2019)	62	1824
Exporting SEZs (November 2019)	3	238

## Physical Infrastructure in Punjab

Parameter	Punjab	India
Installed power capacity (MW) (November 2019)	13,525.32	365,980.54
Wireless subscribers (mn) (October 2019)	40.60	1183.40
Internet subscribers (mn) (June 2019)	24.04	665.31
National highway length (km) (March 2019)	3,274	132,499
Airports (No)	5	132

## Investments (US\$ billion)

Parameter	Punjab <sup>1</sup>	India
Cumulative FDI equity inflows <sup>1</sup> between April 2000 and June 2019	2.15	436.47

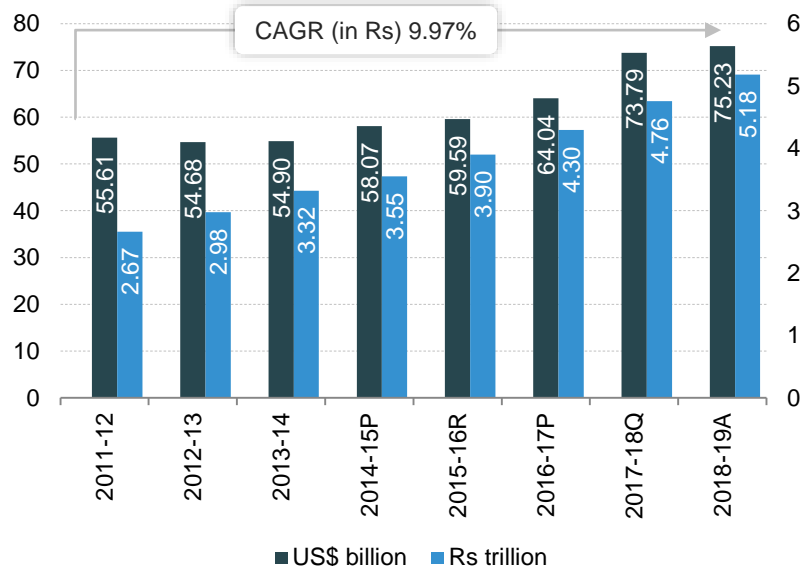
**Note:** \*in Rs terms, GSDP, per capita GSDP figures are taken at current prices, Exchange Rate used is average of 2017-18, i.e. 2018-19, i.e. US\$ = INR 69.89, <sup>1</sup>Including Chandigarh, Punjab and Haryana, \*\* operational, Refer to Annexure for sources



# ECONOMIC SNAPSHOT

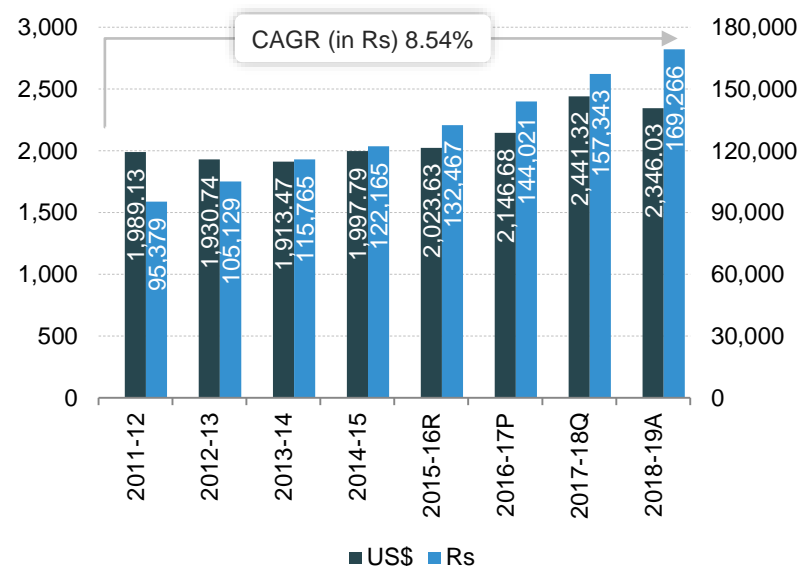


## GSDP of Punjab at Current Prices



- At current prices, the Gross State Domestic Product of Punjab reached Rs 5.18 trillion (US\$ 71.84 billion) in 2018-19 (A).
- The state's GSDP (in Rs) increased at a Compound Annual Growth Rate of 9.97 per cent between 2011-12 and 2018-19.

## Per Capita GSDP of Punjab at Current Prices

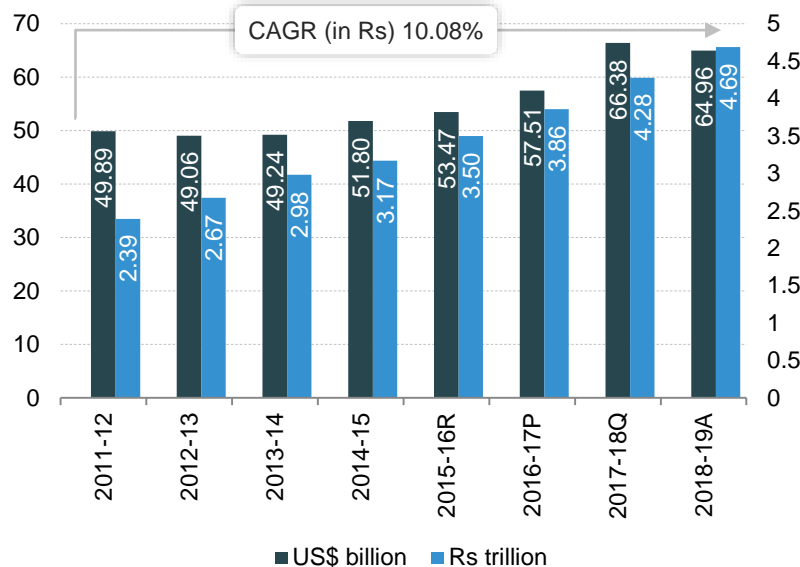


- The state's per capita GSDP in 2018-19 (A) was Rs 169,266 (US\$ 2,346.03).
- The per capita GSDP (in Rs) increased a CAGR of 8.54 per cent between 2011-12 and 2018-19.

**Note:** exchange rates used are averages of each year, P – provisional estimate, R- Revised estimate, Q – quick estimate, A – advance estimate.

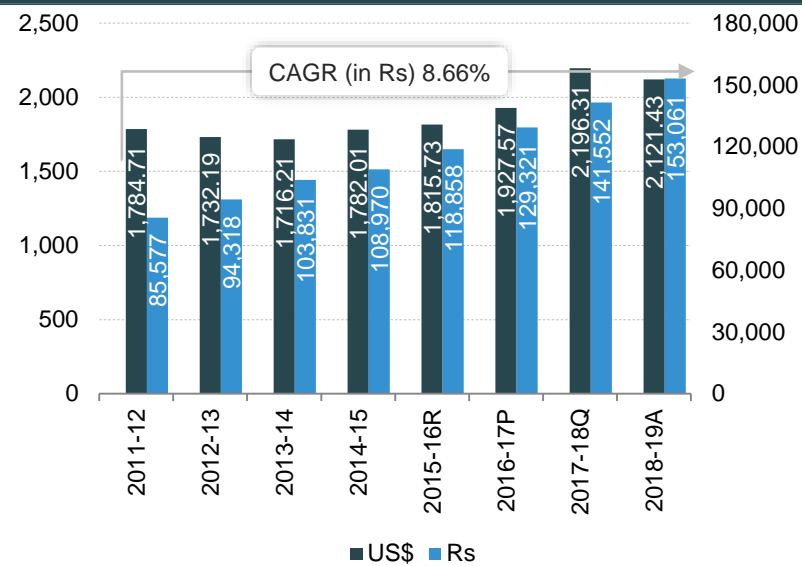
**Source:** Economic & Statistical Organisation of Punjab, MOSPI

## NSDP of Punjab at Current Prices



- At current prices, the Net State Domestic Product of Punjab reached Rs 4.69 trillion (US\$ 64.96 billion) in 2018-19 (A).
- The state's NSDP (in Rs) increased at a Compound Annual Growth Rate of 10.08 per cent between 2011-12 and 2018-19.

## Per Capita NSDP of Punjab at Current Prices



- The state's per capita NSDP in 2018-19 (A) was Rs 153,061 (US\$ 2,121.43).
- The per capita NSDP (in Rs) increased at a CAGR of 8.66 per cent between 2011-12 and 2018-19.

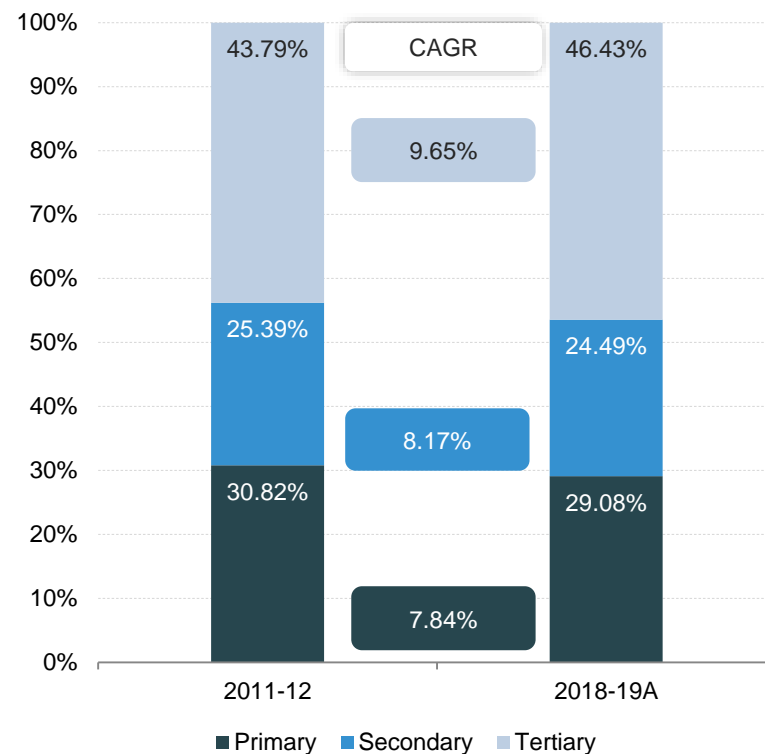
**Note:** exchange rates used are averages of each year, P – provisional estimate, R- Revised estimate, Q – quick estimate, A – advance estimate.

**Source:** Economic & Statistical Organisation of Punjab, MOSPI

# ECONOMIC SNAPSHOT – PERCENTAGE DISTRIBUTION OF GSVA

- With a CAGR (in Rs) of 9.65 per cent between 2011-12 and 2018-19A, the tertiary sector has been the fastest growing sector and was also the largest contributor to Punjab's economy in 2018-19A, with a 46.43 per cent share in the state's GSVA. The growth was driven by transport, communications, real estate, public administration, financial services, insurance, and other services.
- The primary sector contributed 29.08 per cent to Punjab's GSVA in 2018-19A and grew at 7.84 per cent CAGR between 2011-12 and 2018-19A while the secondary sector grew at 8.17 per cent CAGR in the same period and contributed 24.49 per cent in 2018-19A.

**GSVA Composition by Sector at Current Prices**

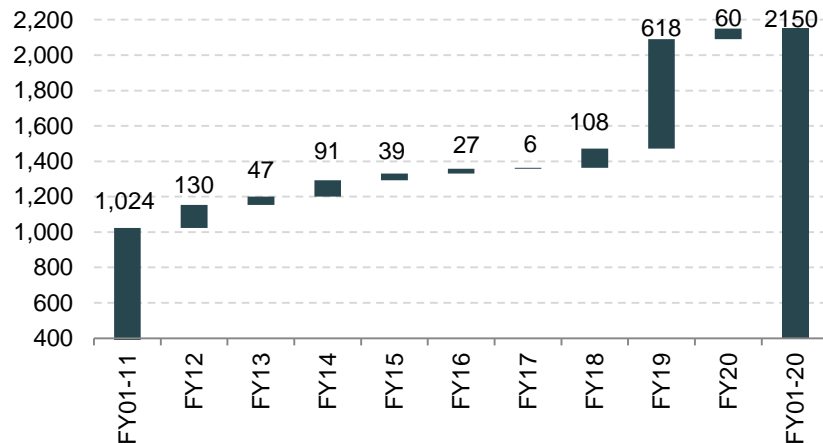


*Note: A – advance estimate, GSVA – Gross State Value Added*

*Source: Economic & Statistical Organisation of Punjab, MOSPI*

# ECONOMIC SNAPSHOT – FDI INFLOWS & INVESTMENTS

**FDI Inflows in Punjab<sup>1</sup> in April 2000-June 2020 (US\$ million)**



**Proposed Investments**

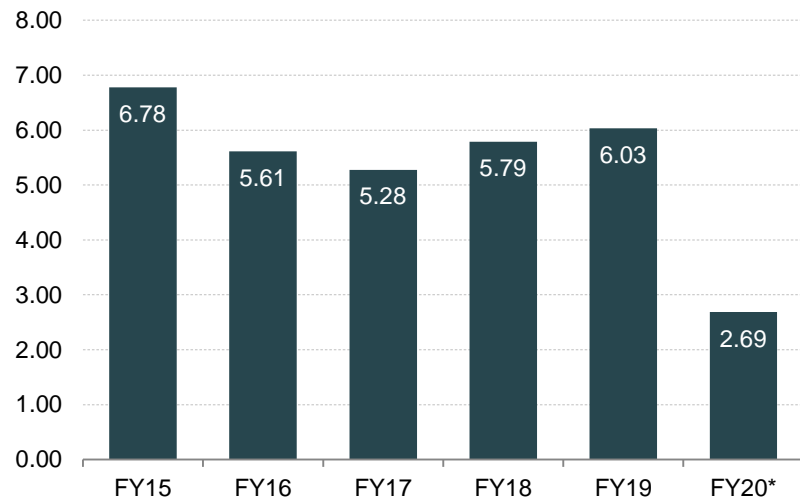
Year	IEMs filed	Proposed investments (in US\$ million)
2016	49	868.3
2017	34	280.4
2018	41	2,979.2
2019 (up to October 2019)	49	249.68

- According to the Department of Industrial Policy & Promotion (DIPP), cumulative FDI inflows to Punjab<sup>1</sup> between April 2000–March 2019 amounted to US\$ 2.09 billion and in Q1FY20 US\$ 60 million.
- During 2019 (up to October 2019), Punjab Government received 49 IEMs with proposed investments of Rs 1,745 crore (US\$ 249.68 million).
- In October 2018, the state government appointed 13 business facilitators at district level to speed up regulatory clearances of private investments worth Rs 60,000 crore (US\$ 8.55 billion).

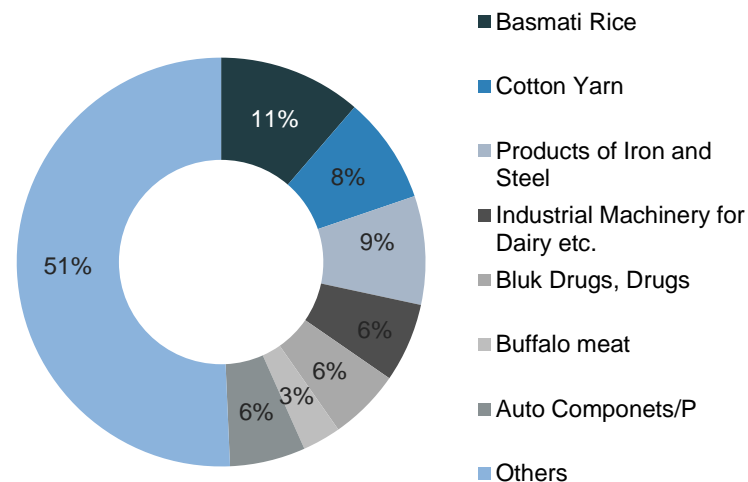
*Note:* <sup>1</sup>Includes Chandigarh, Punjab, Himachal Pradesh and Haryana, IEMs – Industrial Entrepreneur Memorandum Intentions

*Source:* Department for Promotion of Industry and Internal Trade (DPIIT), Invest Punjab

### Merchandise Exports from Punjab (US\$ billion)



### Major Commodities Exported in 2019-20\*



- Total merchandise exports from Punjab were US\$ 6.03 billion in FY19 and reached US\$ 2.69 billion during April-September 2019.
- Basmati Rice, Cotton Yarn, Products of iron and steel and Industrial Machinery account for most of the share in the overall exports of the state.
- Bulk drugs, Buffalo meat and Auto components are the other major products that account for a significant share in Punjab’s export basket.

*Note: \*-till September 2019*

*Source: Department of Industries and Commerce, Government of Punjab, Punjab Economic Survey 2017-18, DGCIS Analytics*

# PHYSICAL INFRASTRUCTURE



# PHYSICAL INFRASTRUCTURE – ROADS

- Punjab is well connected to its four neighbouring states and the rest of India through 15 national highways. Total length of the road network in the state was 72,212, as per the state's economic survey 2017-18.
- As of March 2019, the state had 3,274 km of national highways.
- Under State Budget 2019-20, Rs 1,312 crore (US\$ 187.72 million) has been allocated for construction and maintenance of new roads, bridges and building in the state. Rs 235 crore (US\$ 36.46 million) has been allocated for rural roads under Pradhan Mantri Gram Sadak Yojana (PMGSY) and Rs 300 crore (US\$ 46.55 million) for the Central Road Funds scheme.

Road type	Road length (km)
Total Road Network	72,212
National highways (March 2019)	3,274
State highways	1,503
Rural roads	58,688



*Source: Ministry of Road Transport & Highways, State Budget 2018-19, Ministry of Road Transport and Highways, Maps of India, Updated data expected in Punjab Economic Survey 2018-19*



# PHYSICAL INFRASTRUCTURE – RAILWAYS

- The railways play a major role in the state, connecting major industrial units in the oil refining, cement, fertiliser, thermal power and manufacturing sectors to suppliers and markets.
- Punjab's railway network is more than two times that of the country's average rail density. In 2018-19, commissioning of 4,100 km of railway tracks is targeted which includes 1,000 km of new lines, 1,000 km of gauge conversion and 2,100 km of doubling.
- As per Punjab Economic Survey 2018-19, the state had a railway track network of 1844.65 km.
- Indian railways have built freight corridors—Eastern Freight Corridor from Ludhiana to Dankuni (1,856 km) under its arm Dedicated Freight Corridor Corp. of India Ltd (DFCCIL).
- As of August 2019, tenders have been allotted for the doubling of railway track between Rajpura and Bathinda under a project that will cost Rs 1,769.24 crore (US\$ 253.14 million).

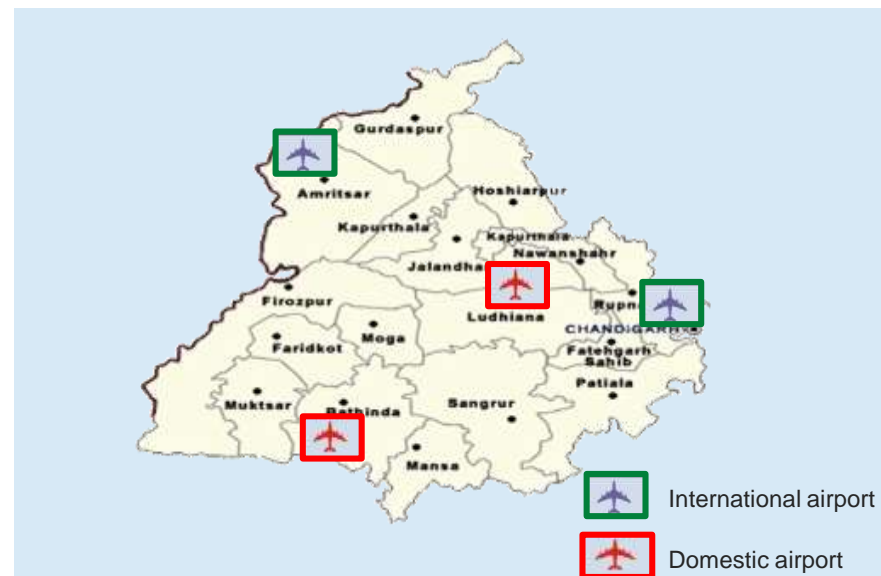


Source: Maps of India

Source: Punjab Bureau of Investment Promotion, Punjab Economic Survey 2018-19, Ministry of Railways, Government of India

# PHYSICAL INFRASTRUCTURE – AIRPORTS

- Punjab has four operational airports; two domestic airports and two international airports. Non-operational airports are expected to be started under the Government of India’s regional connectivity scheme of UDAN - Ude Desh ka Aam Naagrik.
- International flights operate from the “Sri Guru Ram Dass Jee International Airport” at Amritsar and Chandigarh airport.
- During 2018-19 Amritsar airport handled 2.52 million passengers and 1,378 metric tonnes of freight while Chandigarh airport handled 2.09 million passengers and 5,051 metric tonnes of freight.
- In December 2019, Government announced development of MRO facility at Patiala Aviation Complex.

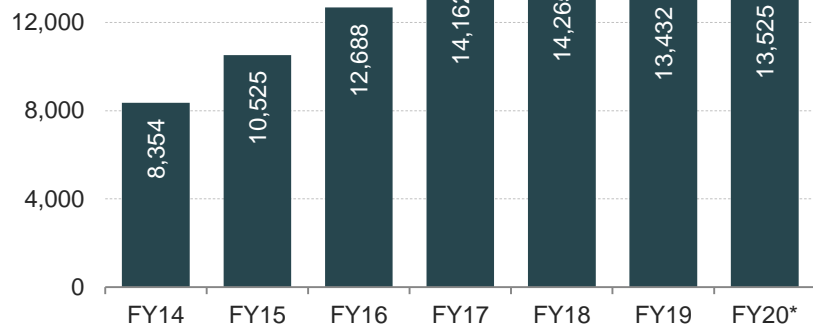


**Airport indicators**

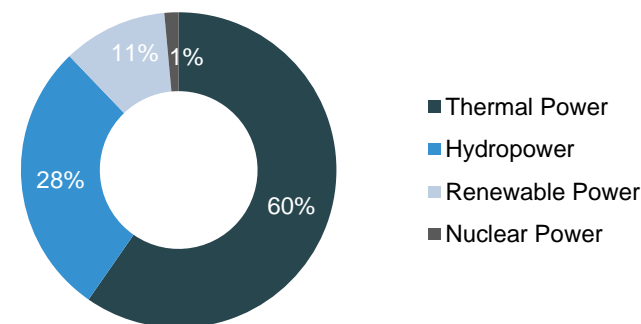
Parameter	Amritsar			Chandigarh		
	2017-18	2018-19	2019-20(Till Nov 2019)	2017-18	2018-19	2019-20(Till Nov 2019)
Aircraft movement	17,767	17,905	11,178	18,715	17,003	12,067
Passenger traffic	2,269,949	2,523,794	15,94,826	2,137,739	2,097,698	16,26,097
Freight handled (metric tonnes)	1,676	1,378	1,658	5,650	5,051	6,561

Source: Airport Authority of India, News Articles

### Installed Power Capacity (MW)



### Break-up of Installed Capacity (FY20\*)



- As of November 2019, Punjab had total installed power generation capacity of 13,525.31 MW of which 8,070.88 MW was contributed by thermal power, 3,809.12 MW by hydropower, 1,448.50 MW by renewable power and 196.81 MW by nuclear power.
- Punjab Energy Development Agency (PEDA) is the nodal organisation for renewable energy development in the state.
- The government of Punjab is continuously focusing on usage of renewable Sources of energy. Total investment potential for a target renewable energy generation capacity of 5,400 MW is projected to be US\$ 6 billion by 2022. The state government aims to achieve a target of 4,200 MW capacity additions in solar energy by 2022. and 300 MW of power generation using biomass by 2022.
- Energy requirement in the state was 40,689 million units between Apr-October 2019.

**Note:** \*-till November 2019

**Source:** Central Electricity Authority, Punjab Bureau of Investment Promotion

## Telecom Statistics (as of October 2019)

Wireless subscribers	40,601,986
Wire-line subscribers	753,184
Internet subscribers (As of June 2019)(mn)	24.04
Tele-density (%)	128.76

## Performance of Bharat Net

Total OFC laid 2018-19 in km(up to December 2018)	12,395
Number of GP for which OFC laid 2017-18 (up to January 2018)	7,903
Service Ready GPs (as of July 2019)	10,521

- At 128.76 per cent, the state has the fourth highest tele density in India, as of October 2019.
- According to the Telecom Regulatory Authority of India (TRAI), Punjab had 40.60 million wireless subscribers and 753,184 wire-line subscribers as of October 2019.
- As of December 2019, 10,521-gram panchayats in the state were service ready under the Bharat Net programme.
- As of April 2019, Reliance Jio was the leading telecom operator in Punjab with more than 12 million mobile customers and added over 2.50 lakh subscribers in March 2019.

**Note:** GP – Gram Panchayat

**Source:** Telecom Regulatory Authority of India; Department of Telecommunications- Ministry of Communications & Information Technology

- There are 167 towns and cities in Punjab and the state has 40 per cent of its population in urban areas.
- Under the Urban Infrastructure and Governance (UIG) programme, five additional projects have been sanctioned and are in the transition phase. Some of the key areas of development are roads and flyovers, water supply, sewerage and solid-waste management.
- Out of 100 smart cities to be created across India, Punjab has three smart cities for the state, which include Amritsar, Jalandhar and Ludhiana.
- As of December 2018, work on Jalandhar’s Integrated Command and Control Centre (ICCC) had been started as a part of making it a smart city.
- Under State Budget 2019-20, Rs 700 crore (US\$ 100.15 million) has been allocated for AMRUT scheme and for smart cities Rs 296 crore (US\$ 42.35 million) for development of Ludhiana, Amritsar, Jalandhar.

## Selected smart cities in Punjab

Cities	Population	Area (sq km)	Literacy rate
Amritsar	2,490,656	2,683	76.27%
Jalandhar	2,193,590	2,624	82.48%
Ludhiana	3,498,739	3,578	82.20%

- Chandigarh – The original planned city**
  - Chandigarh, the joint capital city of Haryana and Punjab, was developed as a planned city. It is also a union territory.
  - Today, it has expanded in terms of industry as well as population.
  - Chandigarh still remains a model for many other Indian cities in terms of civic amenities.
  - It has one of the best electricity distribution systems in India. The Union Ministry of Power selected it as one of the few model distribution centres in the country.
  - The Municipal Corporation of Chandigarh is responsible for its urban infrastructure facilities including water supply, sewerage, roads, slum development, fire service, environment, city beautification and house tax.

*Source: Ministry of Urban Development, Government of India; Department of Planning, Government of Punjab, State budget 2018-19*

# SOCIAL INFRASTRUCTURE



## Higher Education Infrastructure (2018-19)

Government Colleges	199
Government Universities	10
Private Aided Colleges	179
Private Universities	15
Deemed Universities	1

## School Education Statistics (September 2017)

Schools	28,898
Enrolment in Schools	19.16
College	1,063
Enrolment in College	549,972

- Punjab has a literacy rate of 76.7 per cent; male literacy rate is 81.5 per cent and female literacy rate is 71.3 per cent. Literacy rate in Punjab's urban areas is 83.2 per cent and in rural areas it is 71.4 per cent.
- Under the Rashtriya Uchchar Shiksha Abhiyan (RUSA), ten new degree colleges have been proposed for Rs 50 crore (US\$ 7.15 million).
- During 2018-19, Punjab had 199 government colleges, 179 private aided colleges, 10 government universities, 15 private universities and one deemed to be universities.
- Under State Budget 2019-20:
  - Grants to all state universities increased by 6 per cent.
  - Rs 750 crore (US\$ 107.31 million) has been allocated for Samagra Shiksha Abhiyan (Elementary) and Rs 323 crore (US\$ 46.21 million) for Samagra Shiksha (Secondary)
  - Rs 25 crore (US\$ 3.57 million) has been proposed for smart government schools.
  - Under the Rashtriya Uchchar Shiksha Abhiyan (RUSA), ten new degree colleges have been proposed for Rs 50 crore (US\$ 7.15 million).

*Note: Updated data is expected in Punjab Economic Survey 2018-19*

*Source: Economic Survey of Punjab, 2017-18, Census 2011, UDISE, AISHE 2017-18*

## Health Infrastructure (as of December 2019)

Sub-Centres	4,069
Primary Health Centres	566
Community Health Centres	369
Sub District Hospitals	55
District Hospitals	31
<b>Total</b>	<b>5,090</b>

## Health indicators (SRS Bulletin September 2017)

Population served per hospital bed*	1,100
Birth rate <sup>1</sup>	14.9
Death rate <sup>1</sup>	6.0
Infant mortality rate <sup>2</sup>	21

- The public healthcare infrastructure of the state has a 3-tier structure comprising hospitals, primary health centres & sub-centres, health units & community health centres. Around 90 per cent of non-hospital healthcare & 67 per cent of hospital care cases are handled by private healthcare services.
- In State Budget 2019-20, Rs 3,465 crore (US\$ 495.77 million) has been allocated for primary and secondary healthcare services and Rs 978.12 crore (US\$ 139.95 million) has been allocated for upgradation of health infrastructure under National Health Mission (NHM).
- Under Budget 2019-20, Rs 250 crore (US\$ 35.77 million) for Sarbat Sehat Bima Yojana for providing Rs 5 lakh (US\$ 7,000) per family annual health care to 70 per cent Punjab's population.
- The state government is implementing the Integrated Disease Surveillance Programme (IDSP) to identify outbreaks of communicable diseases and respond to them in an effective manner.

**Source:** Economic Survey of Punjab, State Budget 2019-20; Punjab Bureau of Investment Promotion; <sup>1</sup>Per thousand persons; <sup>2</sup>Per thousand live births, \* As of 2016



# INDUSTRIAL INFRASTRUCTURE



# INDUSTRIAL INFRASTRUCTURE ... (2/2)

- Punjab State Industrial Development Corporation Ltd (PSIDC) and Punjab Small Industry and Export Corporation (PSIEC) are responsible for developing industrial infrastructure in the state. Punjab Agro Industries Corporation (PAIC) is responsible for developing agro-based units.
- In 2017-18, the state government announced plans to develop 16 specific industrial parks. There is also a plan to set up MSME Facilitation Councils at regional level at Ludhiana, Jalandhar, Amritsar and Patiala for providing effective facilitation services to MSME units.

Name/Developer	Area	Primary industry
<b>Operational SEZ</b>		
Ranbaxy Laboratories Ltd.	Mohali	Pharmaceuticals
Quarkcity India Pvt. Ltd.	Mohali	IT/ITeS
Infosys Ltd.	Mohali, Punjab	IT/ITeS
<b>Formal approved SEZ</b>		
Lark Projects Private Limited	Mohali, Punjab	Electronic hardware and software
Sukhm Infrastructure Pvt Ltd.	Mohali	IT
Quarkcity India Pvt. Ltd.	Mohali, Punjab	IT
Ranbaxy Laboratories Ltd.	Mohali, Punjab	Pharmaceuticals
Infosys Ltd.	Mohali, Punjab	IT/ITeS
<b>Notified SEZ</b>		
Quarkcity India Pvt. Ltd.	Mohali, Punjab	IT
Ranbaxy Laboratories Ltd.	Mohali, Punjab	Pharmaceuticals

Source: Department of Planning, Government of Punjab, Ministry of Commerce & Industry

Name and location	Primary industry	Description
Electronics Township (ELTOP), Mohali	Electronics	<ul style="list-style-type: none"> <li>Set up by Punjab Information and Communication Technology Corporation Limited (Punjab Infotech) for the promotion and growth of the electronics industry in the state.</li> </ul>
Industry clusters	Industry specific	<ul style="list-style-type: none"> <li>Clusters identified for bicycles and bicycle parts (Ludhiana), steel re-rolling (Mandi Gobindgarh), textiles (Ludhiana), sports and leather goods (Jalandhar), and woollens (Amritsar).</li> </ul>
Food Park Project, Sirhind, Fatehgarh Sahib District	Agro-processing	<ul style="list-style-type: none"> <li>Joint initiative of a Non-Resident Indian (NRI) group and Punjab Agro Industries Corporation; spread over 25 acres and one of India's largest and most sophisticated integrated vegetable and fruit processing complexes with support facilities for an annual capacity of over 5,000 million tonnes (MT) frozen storage facility and 5,000 MT cold storage facility.</li> </ul>
Apparel Park, Doraha, Ludhiana	Textiles	<ul style="list-style-type: none"> <li>Integrated textile park with 115 plots jointly developed by Punjab Small Industry and Export Corporation Limited and the Association of Textile Industry.</li> </ul>
Biotech Park, Dera Bassi, Chandigarh	Biotech	<ul style="list-style-type: none"> <li>Has all the basic facilities including water, electricity, R&amp;D lab and sewage treatment facility, etc.</li> </ul>
SEZ, Mohali	IT and electronics; pharmaceuticals	<ul style="list-style-type: none"> <li>SEZ status granted to QuarkCity in Mohali to promote IT and electronics sectors and to Ranbaxy's SEZ at SAS Nagar, Mohali.</li> </ul>

Source: Department of Planning, Government of Punjab, Ministry of Commerce & Industry

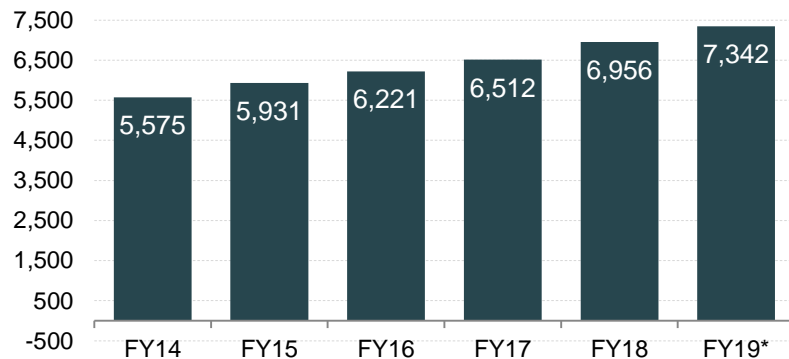
# KEY SECTORS

- ❖ Agriculture and Allied Industries
- ❖ IT, Electronics and Light Engineering Goods
- ❖ Textiles
- ❖ Petrochemicals and Fertilizers



# KEY SECTOR – AGRICULTURAL AND ALLIED INDUSTRIES... (1/3)

**Horticulture Production ('000 MT)**



**Crop**

**Production 2018-19 E ('000 metric tonnes)**

Rice	12,822
Wheat	17,050
Total Cereals	30,399
Total Pulses	46
Total Food grains	30,445

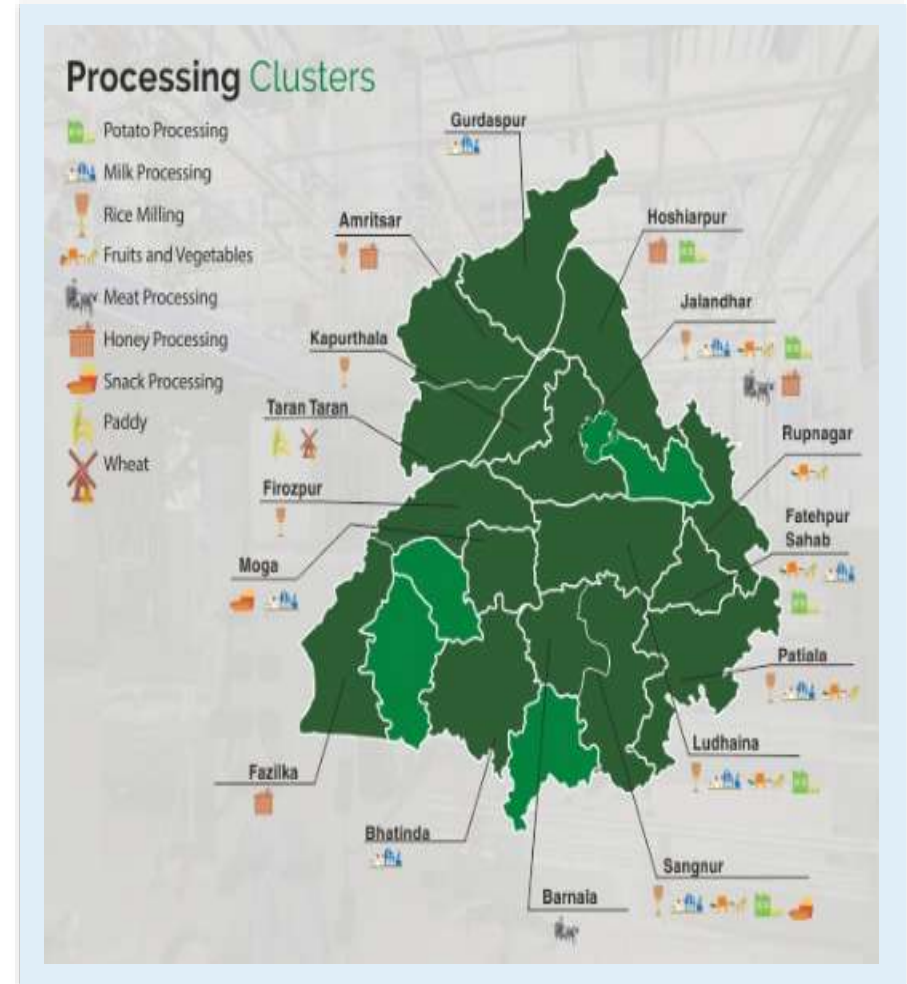
- Agriculture is one of the significant sectors for the growth of Punjab's economy. It is providing livelihoods to more than 60 per cent of the state's population and is known as the 'Bread Basket of India' leading to the first Green Revolution in the country. Principal crops sown in Punjab are cotton, wheat, rice, maize and sugarcane. The major fruits grown in Punjab include orange, kinnows, lemon, malta, pear, grapes, mango & guava. Potato is the only major vegetable produced in the state. The state accounts for the highest yield of rice, paddy and wheat in India.
- Basmati rice is the most exported commodity from the state. Its exports reached US\$ 597.22 million in FY19 and US\$ 304.28 million between Apr-Sept 2019.
- Total food grain production during 2018-19 is stood at 30.44 million metric tonnes, as per state's economic survey 2018-19. Horticulture production in the state reached 7,342.12 thousand metric tonnes in 2018-19, as per the third advance estimates.

*Note: \*2nd advance estimates, E - Estimated*

*Source: Department of Agriculture, Government of Punjab, Punjab Economic Survey 2017-18, Department of Agriculture Cooperation and farmers Welfare*

# KEY SECTOR – AGRICULTURAL AND ALLIED INDUSTRIES... (2/3)

- Food processing is considered to be a focus area in the state and the government has made various efforts in aiding deserving investments for the food processing industry.
- By 2025, it is expected that the state will be among the leading producers of non food grains as well as exporter of various agri-products.
- Three mega food parks and one food park in Punjab have been notified by the Ministry of Food Processing Industries out of which one mega food park is operational and second is partially operational as of April 2019.
- Government plans to make third mega food park at Phagwara operational by 2020.
- There are 33 mega agro processing projects and 19 cold storage chains in the state.
- In January 2019, the state inaugurated its first agriculture skill centre.



Source: Ministry of Food Processing Industries

# KEY SECTOR – AGRICULTURAL AND ALLIED INDUSTRIES... (3/3)

## Key players



**Nestle India**

- A subsidiary of Nestle SA, Switzerland, the company started milk collection in Moga, Punjab, in 1961 and has expanded operations to a network of more than 85,000 farmers.
- The company has its processing unit in Moga.



**MilkFed**

- MILKFED (The Punjab State Cooperative Milk Producers' Federation Ltd) was formed in 1973 with the objectives of providing remunerative prices to milk producers in the state, marketing their produce and providing technical inputs for the enhancement of milk production.
- The company has a strong network of about 7,370 milk producers' cooperative societies at the village level, 12 milk plants and two cattle-feed factories.



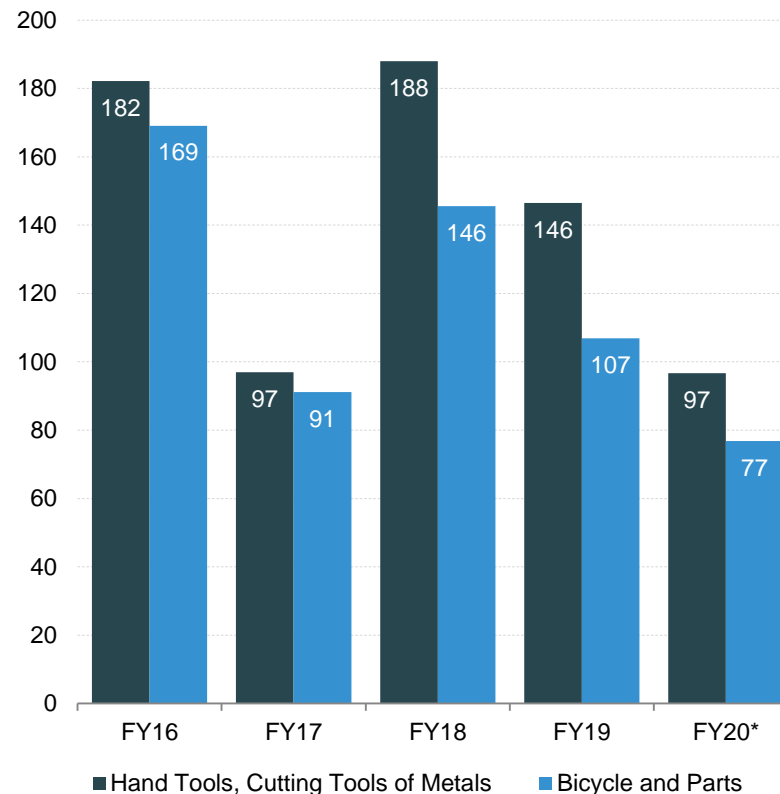
**Markfed**

- Punjab Markfed is a marketing federation of over 3,069 societies. The cooperative has won recognition and many awards from the Government of India in several areas of excellence; Markfed represents the interests of over a million farmers in the state.

# KEY SECTOR - IT, ELECTRONICS AND LIGHT ENGINEERING GOODS ... (1/2)

- Punjab's IT policy and the incentives offered to the IT industry are aimed at promoting Punjab as an attractive destination for the industry. Mohali has been developed as an IT and ITeS hub in the state.
- Exports from Software Technology Parks of India (STPIs) in Punjab reached Rs 425.5 crore (US\$ 63 million) in FY17 while exports from IT/ITeS SEZs in the state reached Rs 323.5 crore (US\$ 48 million) in the same year.
- The light engineering goods industry in Punjab includes bicycle and bicycle parts, machine tools/hand.
- Hand tools such as wrenches, hand drills, pullers, vices, hammers, screw drivers, pliers, spanners, etc., are manufactured mainly in Ludhiana and Jalandhar. Sewing machines and their parts are mostly manufactured in Jalandhar.
- The machine tools industry comprising lathes, shapers, milling machines, drilling machines and special purpose machines for different industries is mainly concentrated in Batala and Ludhiana

**Light Engineering Goods Exports from Punjab (US\$ million)**



*Note: STPI - Software Technology Parks of India, Data is as per latest available information*

*Source: Department of information and Technology, Government of Punjab*



# KEY SECTOR - IT, ELECTRONICS AND LIGHT ENGINEERING GOODS ... (2/2)

## Key players



**Infosys Ltd**

- Infosys, which recorded consolidated revenues of US\$ 2.69 billion in Q3 FY18, has thirty two development centres across the country, with one in Mohali, set up in 2001. The Mohali centre is equipped with the latest technology and solutions for enterprise networking, office productivity, collaborative software engineering and distributed project management.
- In 2014, Infosys started work from at its IT unit at Mohali.



**APLAB Ltd**

- APLAB Ltd is a public enterprise incorporated in 1962 to provide solutions to business sectors such as telecommunication, IT, retail banking, retail fuel-dispensing as well as power control and conditioning. The company has four independent product divisions: test and measurement equipment, power conversion and Uninterrupted Power Systems (UPS), self-service terminals for banking, and self service terminals for petroleum sectors. In Punjab, the company has presence in Chandigarh, Ludhiana, Amritsar and Jalandhar.



**Hero Cycles**

- A part of the Hero Group and among the world's largest producers of bicycles, the company's annual bicycle production is 19,500 cycles per day. It started exporting to Africa and the Middle East in 1963. Today, more than 50% of its bicycle exports are to Europe and the US. It has tied up with National Bicycle Industries, a part of the Matsushita Group, Japan, to manufacture high-end bicycles. It has a manufacturing unit in Ludhiana.



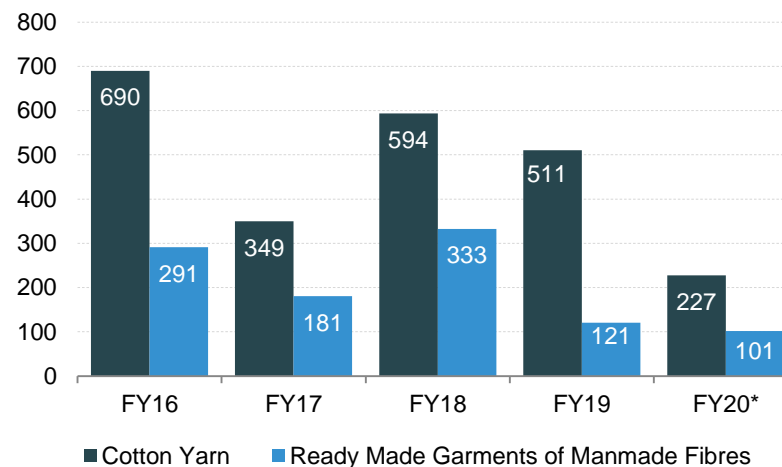
**PABLA Bearings Ltd**

- Pabla is a leading manufacturer and exporter of superior quality bearings, agricultural machinery bearings, home appliances bearings, auto bearings, two-wheeler auto bearings, four-wheeler auto bearings, etc. The company is based in Ludhiana, Punjab. Its major markets include India, Indonesia, Sri Lanka, Egypt, Europe, Middle East, Bangladesh, Thailand and Singapore.

## Current projects in Punjab

Name of textile park	Location	Area	Key activity
Ludhiana Integrated Textile Park	Ludhiana	60	Circular knitting, flat knitting- manual and computerized garmenting
Rhythm Textile & Apparel Park	Shaheed Bhagat Singh Nagar	20	Garmenting & knitting
Lotus Integrated Textile Park	Barnala	100	Production of towels, melange yarn, bathrobes and training center
Punjab Apparel Park	Ludhiana	85	Production of readymade garments

## Textiles Exports from Punjab (US\$ million)



- The textile sector in the state is strong on all aspects of the value chain, i.e., from the raw material stage to the finished products (garments) stage.
- Punjab is among the largest producers of cotton and blended yarn as well as mill-made fabrics in India. Ludhiana is often referred to as the 'Manchester of India'.
- In 2018-19, cotton production in the state is estimated at 1.259 million bales.
- In FY20\*, Punjab exported cotton yarn worth US\$ 227.27 million and ready-made garments (manmade fibres) worth US\$ 101 million.

*Note: \*- till September 2019*

*Source: Ministry of Textiles, Government of India, Central Silk Board, Department of Agriculture Cooperation And Farmers Welfare, Punjab Economic Survey 2017-18, DGCIS Analytics*

## Key players



**Nahar Group of Companies**

- The Nahar Group of companies is also known as the OWM Group. The group's portfolio comprises spinning, knitting, fabrics and hosiery garments. It operates seven firms: Oswal Woollen Mills Ltd, Nahar Spinning Mills Ltd, Nahar Industrial Enterprises Ltd, Nahar Poly Films Ltd, Monte Carlo Fashion Ltd, Cotton County Retail Ltd and Nahar Capital & Financial Services Ltd. Most of its manufacturing facilities are located at Ludhiana and Mohali.



**Vardhmān**

**Vardhman Group**

- Vardhman Textiles Limited, formerly Mahavir Spinning Mills Limited, is a large textile producer in India. The company operates in five segments: yarn, sewing thread, steel, fibre and fabric. The yarn segment comprises production of various types of yarns (cotton, manmade fibres and blends) and yarn processing activities.
- . The company has its corporate office at Ludhiana, yarn manufacturing units at Ludhiana, Hoshiarpur and Malerkotla and dyeing units at Ludhiana and Hoshiarpur. The company recorded total revenues of US\$ 244.3 million in Q3 FY18.



**JCT Ltd**

- JCT Limited, one of the leading manufacturers of textiles and filament yarn, is the flagship company of the Thapar group. It has operations in two distinct businesses: cotton, synthetic and blended textiles, and nylon filament yarn.
- The company has an integrated textile facility at Phagwara, Punjab.

- Industrial activity in the petrochemicals and fertiliser categories includes refining, petrochemicals, chemicals, fertilizers and other related products and distribution.
- Under “Soil Health Management (SHM), various initiatives have been taken by the government. One of the major initiatives in the fertiliser sector is strengthening the existing quality control procedures for fertilisers in laboratories.

### Fertilizer Requirement and Sales in Punjab (for October 2019)

Type	Requirement (metric tonnes)	Sales (metric tonnes)
Urea	350,000	304,912.16
Diammonium Phosphate (DAP)	150,000	112,782.5
Muriate of Potash (MOP)	15,000	5,607.35
Nitrogen-Phosphorus-Potassium (NPK)	30,000	4,409.8

### Some of the key players

- Hindustan Petroleum Corporation Ltd
- National Fertilisers Ltd
- Punjab Chemicals and Crop Protection Ltd
- Punjab Alkalies & Chemicals Ltd

Source: Annual Plan 2016-17, The Fertilisers Association of India, Department of Fertilizers

# KEY SECTOR – PETROCHEMICALS AND FERTILISERS

... (2/2)



**Hindustan Petroleum Corp Ltd (HPCL)**

- HPCL is a Fortune 500 company.
- HPCL-Mittal Energy Limited (HMEL), a joint venture company of HPCL with Mittal Energy Investments Pte Limited, has set up a state-of-the-art, 9 million metric tonnes per annum (MMTPA) refinery at Bathinda in Punjab.



**National Fertilizer Ltd**

- NFL is one of the largest producers of nitrogenous fertilisers in the country. It is actively promoting the use of bio-fertilisers in the state and produces neem-coated urea at its facility in Bhatinda.



**Punjab Chemicals and Crop Protection Ltd**

- Punjab Chemicals and Crop Protection Limited is engaged in the business of agrochemicals; it manufactures technical grade pesticides, herbicides, fungicides and biocides, as well as their formulations. The company has presence in both domestic and international markets. It has its registered office in Chandigarh.



**Punjab Alkalies & Chemicals Ltd**

- Punjab Alkalies & Chemicals Limited's three principal products include caustic soda lye, chlorine and hydrochloric acid. Its plant is located at Naya Nangal in Punjab.

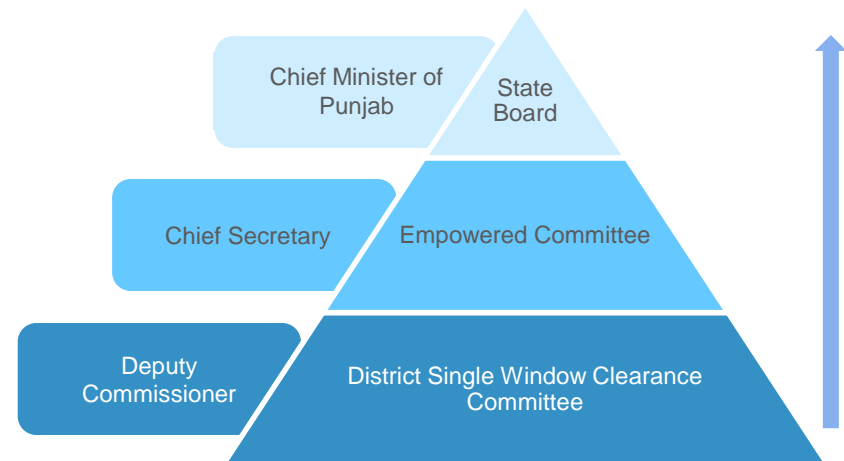
# KEY PROCEDURES & POLICIES



# THREE-TIER SINGLE-WINDOW CLEARANCE MECHANISM ... (1/2)

- The Single-Window Clearance Mechanism (SWM) has been established under the Punjab Industrial Facilitation Act, 2005, with the following three-tier structure to grant exemption/relaxation from any of the provisions/rules of the act:
  - **District Single-Window Clearance Committee:** Instituted in each district of the state, the committee is chaired by the Deputy Commissioner and has the senior-most officers of district departments as its members.
  - **Empowered Committee:** This committee is chaired by the Chief Secretary to the Government of Punjab and has the principal secretaries of state departments as its members.
  - **State Board:** The board has the Chief Minister of Punjab as its chairman and ministers of state departments as its members.

## Single-Window Clearance Mechanism in Punjab



Source: Department of Industry, Government of Punjab

# THREE-TIER SINGLE-WINDOW CLEARANCE MECHANISM ... (2/2)

Level	Nodal agency	Composition & role
State-level	Udyog Sahayak	<p>The agency members include officers from the Punjab State Electricity Board (PSEB), Punjab Pollution Control Board (PPCB), Punjab Infotech, PSIDC, PFC, PSIEC, Department of Labour, PAIC and the Directorate of Industries.</p> <p>The agency handles the composite application forms received from entrepreneurs and assists in obtaining clearances from various departments within the stipulated time period. It also provides guidance and information to investors about policies and programmes; it is monitored by an empowered committee.</p>
District-level	DIC	<p>The DIC is headed by the general manager at the district level and includes the environmental engineer of the PPCB, the superintending engineer/executive engineer of PSEB, the district officer of the Housing and Urban Development Authority and the assistant director of factories from the Directorate of Factories. The DIC provides sanctions and clearances for setting up small scale industrial units in the state.</p>

*Source: Department of Industry, Government of Punjab, PSIDC: Punjab State Industrial Development Corporation Ltd, PFC: Punjab Financial Corporation, PSIEC: Punjab Small Industries & Export Corporation Limited, PAIC: Punjab Agro Industries Corporation Limited*



# KEY INVESTMENT PROMOTION OFFICES

Agency	Description
Punjab Small Industry and Export Corporation Limited (PSIEC)	<ul style="list-style-type: none"> <li>▪ Focuses on the development of SSI units and promotion of exports.</li> <li>▪ Responsible for setting up industrial focal points.</li> </ul>
Punjab Finance Corporation (PFC)	<ul style="list-style-type: none"> <li>▪ Provides medium and long term loans for setting up new industrial units, expanding existing units and reviving sick units in the state (loan limits set by the State Financial Corporation Act, 1951).</li> </ul>
Punjab Agro Industries Corporation (PAIC)	<ul style="list-style-type: none"> <li>▪ Acts as the promoter for agro-based industries in Punjab and provides inputs such as fertilisers, machinery, seeds and pesticides to farmers.</li> <li>▪ Assists investors in obtaining all necessary approvals for new projects and facilitates contract farming.</li> </ul>
Punjab State Industrial Development Corporation Limited (PSIDC)	<ul style="list-style-type: none"> <li>▪ Promotes large- and medium-scale projects in the state.</li> <li>▪ Provides escort services, especially for industrial ventures, and has been instrumental in facilitating the projects of Godrej-GE (white goods), Century Textiles (pulp and paper), Gujarat Ambuja (cement), ICI (paints) and HPCL-Saudi Aramco (mega project for gas).</li> <li>▪ Acts as an infrastructure developer and financial facilitator.</li> </ul>

Source: Department of Industry, Government of Punjab

# CONTACT LIST

Agency	Contact information
Punjab Small Industry and Export Corporation Limited (PSIEC)	Udyog Bhawan 18, Himalaya Marg, Sector-17/A Chandigarh-160017 Phone: 91-172-2704756, 2704865, 2702751, 2702656 Mob: 09814700407 Fax: 91-172-2702039 E-mail: psiec_chd@yahoo.co.in
Punjab State Industrial Development Corporation Limited (PSIDC)	Udyog Bhawan 18, Himalaya Marg, Sector-17 Chandigarh-160 017 Phone: 91-172-2704040, 2702881-84, 2702 791 Fax: 91-172-2704 145 E-mail: psidc@rediffmail.com, psidcltd@yahoo.co.in

# KEY APPROVALS REQUIRED

Service or facility	Agency	Timelines
Industrial License	Department of Industries	2 weeks
Sponsorship for raw materials and inputs		4 weeks
Land allotment		4 weeks
Incentives	Udyog Sahayak	Sales tax exemption: 1 week Investment incentive: 4 weeks Other incentives: 2 weeks
Sanction of loan	PFC/PSIDC	8 weeks
Release of power connection	PSEB	Load up to 20 kW: 8 weeks Load from 21–100 kW: 12 weeks Load from 101–500 kW: 12 weeks Load above 500 kW: 90 days
Site approval/environmental clearance	Department of Environment, Pollution Control Board	60 days
Adequacy certificate		30 days
No-objection certificate		Green category: 15 days Red category: 30 days

Source: Department of Industry, Government of Punjab

# LIST OF APPROVALS - Punjab Bureau of Investment Promotion

Regulatory Authority	Power vested with PBIP (Punjab Bureau of Investment Promotion)
Punjab Pollution Control Board (PPCB)	<ul style="list-style-type: none"> <li>▪ Consent to establish</li> <li>▪ Consent to operate (under Water Act &amp; Air Act)</li> <li>▪ Authorization under Hazardous Waste Rules</li> <li>▪ Registration for Recycling of Hazardous Waste Rules</li> <li>▪ CSA Clearance</li> <li>▪ Authorization under E-waste Rules, 2011</li> <li>▪ Registration under Plastic Rules</li> <li>▪ Authorization for Bio Medical Waste Disposal</li> <li>▪ Site appraisal/approval</li> </ul>
Excise & Taxation	<ul style="list-style-type: none"> <li>▪ VAT Incentives</li> </ul>
Labour	<ul style="list-style-type: none"> <li>▪ Shop Registration</li> <li>▪ Permission for engaging contractor for labour</li> <li>▪ Annual returns under Labour Laws</li> </ul>
Factories Department	<ul style="list-style-type: none"> <li>▪ Factories License</li> <li>▪ Annual Filling under Factories Act</li> <li>▪ Factory Building Plan approval</li> </ul>
Industries	<ul style="list-style-type: none"> <li>▪ Registration under Boilers Act</li> </ul>
Housing and Urban Development	<ul style="list-style-type: none"> <li>▪ Change of land use and approvals of building plans</li> </ul>

Source: Punjab Bureau of Investment Promotion

# COST OF DOING BUSINESS IN PUNJAB

Cost parameter	Cost estimate
Industrial land (per sq mt)	Mohali: US\$ 35.42, Ludhiana: US\$ 17.71, Amritsar: US\$ 11.10
Office space rent (per sq ft per month)	US 17 cents to US 32 cents
Residential rent (2,000 sq m house per month)	US\$ 287-US\$ 478.72
5-star hotel room (per night)	US\$ 57.45– US\$ 80.43
Electricity (per kWh)	US 8.6 cents
Water	Commercial and industrial: US 14.0 cents per 1,000 litres

*Source: Ministry of Labour and Employment, Government of India, Punjab State Electricity Regulatory Commission, Industrial Sources, Municipal Corporation Mohali*

## Objectives

### Tourism Policy, 2018

- To promote tourism and to double the annual tourist visits in the State from 25 million to 50 million in the next five years by creating new infrastructure and improving the existing one.

[Readmore](#)

### Industrial and Business Development Policy 2017

- To accelerate industrial growth and job creation
- To accelerate growth of MSMEs
- To improve the ease of doing business in the State

[Read more](#)

### SPIRE Punjab 2016

- Develop 10 top class start up hubs and bring in place 3 world class accelerators to support the efforts by 2021.
- To make available 50,000 sq. ft. incubation space for startups.

[Read more](#)

### Industrial Promotion Policy, 2013

- Enhance the contribution of secondary and tertiary sectors in the state's growth.
- Ensure overall development of the state by providing incentives to less developed zones.

[Read more](#)

### Agriculture Policy for Punjab, 2013

- The State Agriculture Policy aims to address various interlinked concerns of sustainability of the current cropping pattern and stagnating farm incomes through a simultaneous and multi-pronged action with an emphasis on improvement in production technology and infrastructure, pushing up capital formation, restructuring the incentives and streamlining the institutions.

[Read more](#)

### New and Renewable Sources of Energy (NRSE) Policy, 2012

- To maximise and improve the share of new and renewable Sources of energy to 10% of the total installed power capacity in the state by 2022.

[Read more](#)

## Objectives

Agro-Industrial Policy,  
2009

- To make Punjab the destination of choice for investors and processors, globally as well as domestically.

[Read more](#)

Special Economic Zone  
(SEZ) Act, 2009

- To promote SEZs in the state by providing unique incentives to infrastructure developers.
- To promote and set up self-contained large industrial townships.

[Read more](#)

IT/Knowledge Industrial  
Policy, 2009

- To create an enabling environment for IT and knowledge-based industries by focusing on creating the necessary infrastructure, developing human capital, proactively engaging with investors and ensuring effective policy implementation.

Industrial Policy, 2009

- To establish synergy between the agriculture and industrial sectors, rejuvenate the small scale industries and attract more investments in the large scale industries.

[Read more](#)

Notification Textile  
Policy, 2006

- To facilitate and promote the growth of the textile industry, achieve global standards in product quality, contribute more to exports and encourage textile clusters.

Land Allotment Policy,  
2008

- To accelerate the pace of growth of industry in the state and make the process of land acquisition quicker for entrepreneurs.

[Read more](#)

Industry Type	Investment Promotion
Agro and food processing	<ul style="list-style-type: none"> <li>▪ Food Park - Kapurthala: Aid in meeting current and future market requirements</li> <li>▪ Food Park - Ladhawal: Provide modern infrastructure facilities for food processing</li> <li>▪ Mega Food Park – Fazilka: multi-dimensional food processing infrastructure facility</li> </ul>
Light engineering	<ul style="list-style-type: none"> <li>▪ Excellent infrastructure in terms of availability of power and connectivity</li> <li>▪ Good record of industrial relations</li> </ul>
Textile	<ul style="list-style-type: none"> <li>▪ Punjab accounts for 14% of the total cotton yarn production in India</li> <li>▪ South western region of the state, comprising of Mansa, Muktsar, Bathinda and Faridkot, is the main cotton producing area in Punjab.</li> </ul>
Information technology	<ul style="list-style-type: none"> <li>▪ Area of 1,700 acres is available for immediate development, located in the vicinity of the Sri Guru Ram Dass Jee International Airport (Amritsar) and the railway station</li> <li>▪ 40 acres of land in the IT City has been earmarked for electronics and hardware companies</li> </ul>
Bio-Science and health care	<ul style="list-style-type: none"> <li>▪ Medicity comprises 260 acres for the development of world class hospitals, pharmaceutical and bio-technology institutions, research centres and a medical college.</li> <li>▪ Phase I of development of Medicity is underway with the setting up of Tata Cancer &amp; Research Hospital.</li> </ul>
Infrastructure and renewable energy	<ul style="list-style-type: none"> <li>▪ Ensure availability of quality power to industrial and domestic users at competitive prices</li> <li>▪ Bus Rapid Transit Systems (BRTS) have been planned in the major cities of the state to augment the urban infrastructure</li> <li>▪ State has plans to further augment the road infrastructure with four and six lane expressways to connect all the major towns of Punjab</li> </ul>

Source: Punjab Bureau of Investment Promotion



Industry Type	Investment Promotion
Housing and real estate	<ul style="list-style-type: none"> <li>▪ In the next four years, Punjab plans to provide all its 147 cities and towns with planned development including 24 x 7 availability of quality power, 100% coverage for sewerage, solid waste management facilities and projects to ensure smooth traffic flow</li> </ul>
Education and skills development	<ul style="list-style-type: none"> <li>▪ Land measuring 1,500 acres is under acquisition for development of an Integrated Knowledge/ Education city</li> <li>▪ Land is available for setting up of universities, higher education institutes, R&amp;D institutions and colleges in various disciplines.</li> </ul>
Amritsar-Kolkata Industrial Corridor	<ul style="list-style-type: none"> <li>▪ Major cities like Amritsar, Jalandhar, Ludhiana connected via the corridor</li> <li>▪ Major expansion of infrastructure using the Public-Private Partnership (PPP) approach</li> <li>▪ Access to north and north eastern markets regions, which house 40% of India's population</li> <li>▪ Easy movement of freight across states</li> <li>▪ Push for industrialization and job creation</li> </ul>

Source: Punjab Bureau of Investment Promotion

# ANNEXURE



# ANNEXURE...(1/2) - SOURCES

Data	Sources
GSDP (state)	Economic & Statistical Organisation of Punjab
Per capita GSDP figures	Directorate of Economics & Statistics of Punjab, Central Statistics Office
GSDP (India)	Central Statistics Office
Installed power capacity (MW)	Central Electricity Authority
Wireless subscribers (No)	Telecom Regulatory Authority of India
Internet subscribers (Mn)	Telecom Regulatory Authority of India
National highway length (km)	NHAI, Roads and Building Department-Government of India
Airports (No)	Airports Authority of India
Literacy rate (%)	Census 2011
Birth rate (per 1,000 population)	SRS Bulletin September 2017
Cumulative FDI equity inflows (US\$ billion)	Department for Promotion of Industry and Internal Trade
Operational PPP projects (No)	DEA , Ministry of Finance, Government of India

# ANNEXURE...(2/2) - EXCHANGE RATES

## Exchange Rates (Fiscal Year)

Year INR	INR Equivalent of one US\$
2004-05	44.95
2005-06	44.28
2006-07	45.29
2007-08	40.24
2008-09	45.91
2009-10	47.42
2010-11	45.58
2011-12	47.95
2012-13	54.45
2013-14	60.50
2014-15	61.15
2015-16	65.46
2016-17	67.09
2017-18	64.45
2018-19	69.89

## Exchange Rates (Calendar Year)

Year	INR Equivalent of one US\$
2005	44.11
2006	45.33
2007	41.29
2008	43.42
2009	48.35
2010	45.74
2011	46.67
2012	53.49
2013	58.63
2014	61.03
2015	64.15
2016	67.21
2017	65.12
2018	68.36

Source: Reserve Bank of India, Average for the year

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