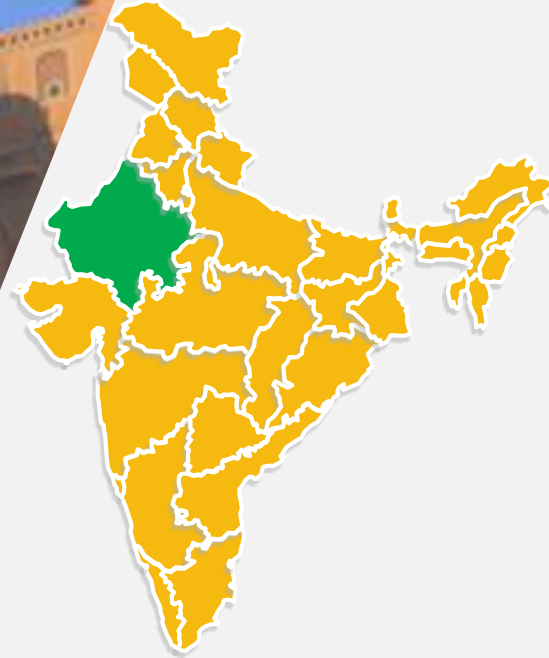


HAWA MAHAL IN JAIPUR, RAJASTHAN



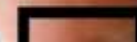
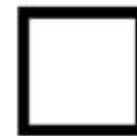
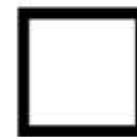
RAJASTHAN

ROYAL HERITAGE



Table of Content

- ▶ Executive Summary3
- ▶ Introduction4
- ▶ Economic Snapshot.....9
- ▶ Physical Infrastructure.....15
- ▶ Social Infrastructure.....23
- ▶ Industrial Infrastructure.....26
- ▶ Key Sectors.....29
- ▶ Key Procedures And Policies.....36
- ▶ Annexure.....49



Thriving tourism industry

- During 2018, tourist arrivals in the state reached 51.9 million. Historic palaces, especially those in Jaipur and Udaipur, offer opportunities to expand the luxury tourism segment, with increasing number of tourists visiting wild life sanctuaries and desert locations.

Leading producer of agro-based products

- Rajasthan is the second largest producer of oilseeds and largest producer of coarse cereals in India, as of FY17. Tremendous opportunities exist in the areas of organic and contract farming as well as in infrastructure developments related to agriculture.

Focus on renewable energy

- The state has immense potential for electricity generation through renewable energy sources and wind power. Rajasthan Renewable Energy Corporation Ltd has actively promoted solar energy and biomass projects.

Strong economic growth

- Rajasthan's Gross State Domestic Product (GSDP) expanded at a CAGR (in Rs) of 11.37 per cent over 2011-12 to 2018-19.

Conducive policy environment

- The policy environment has been favourable for the establishment of industrial units. A Single Window Clearance System (SWCS) for investment approvals is operational in the state and the Bureau of Investment Promotion (BIP) was set up to focus on investments above US\$ 2.2 million.

One of the largest producers of crude oil

- Rajasthan is the second largest* producer of crude oil in India, recording production of approximately 7.72 million metric tonnes (MMT) of crude oil[^] in FY18P, which was 22.68 per cent of the total domestic crude oil production in the country.

*Note: 2nd largest * – After Offshore production, ^does not include condensate, E- Estimate, P - Provisional*

Source: Bureau of Investment Promotion, Ministry of Tourism, Rajasthan Economic Survey 2018-19, Central Statistics Office



INTRODUCTION



Source: Confederation of Indian Industry

High economic growth and stable political environment

- GSDP grew at a CAGR (in Rs) of 11.37 per cent between 2011-12 and 2018-19.
- With a stable political environment, the government is committed towards creating a progressive business environment.

Rich labour pool and infrastructure support

- Rajasthan has been investing in capacity building through the development of a strong institutional network at all levels. The state has renowned higher education institutions in various disciplines, producing thousands of skilled and proficient young individuals every year.
- The state is developing sector specific infrastructure, such as special purpose industrial parks and special economic zones (SEZs) for exports of handicrafts, IT and electronic goods.

Advantage Rajasthan

Abundant mineral resources and location advantage

- Rajasthan offers a variety of unexploited agricultural and mineral resources, which is indicative of the scope for value addition and exports.
- It borders six major states in the northern, western and central parts of India. Rajasthan is a natural corridor between the wealthy northern and the prosperous western states, making it an important trade and commerce centre.

Policy and incentives

- The state offers a wide range of fiscal and policy incentives for businesses. The Government has introduced sector-specific policies for tourism, biotechnology, IT and ITeS industries.
- Rajasthan has a favourable industrial relations environment. In addition, the law & order situation in the state ensures a good working environment.

Note: E - Estimate

Source: GSDP: Gross State Domestic Product



Source: Maps of India

- Rajasthan is the largest state, by area, in India, is situated in the north-western part of the subcontinent. It is surrounded on the north and north-east by Punjab, Haryana and Uttar Pradesh; on the east and south-east by Uttar Pradesh and Madhya Pradesh and on the south-west by Gujarat.
- Jaisalmer, Udaipur, Jodhpur, Ajmer, Bikaner, Alwar, Amber and Chittorgarh are some of the key cities and towns in the state.
- The most commonly spoken language of the state is Hindi. Marwari, Jaipuri (Dhundhari), Mewari and Malvi are the other dialects popular in the state. English is the medium of education in most schools.

Source: Economic Review of Rajasthan 2017-18, Census 2011

Parameters	Rajasthan
Capital	Jaipur
Geographical area (lakh sq. km)	342,239
Administrative districts (No)	33
Population density (persons per sq. km)	200
Total population (million)	68.6
Male population (million)	35.6
Female population (million)	33.0
Sex ratio (females per 1,000 males)	928
Literacy rate (%)	66.1

Rajasthan's Contribution to Indian Economy (2018-19)

Parameter	Rajasthan	India
GSDP as a percentage of all states' GSDP	4.85	100.00
GSDP growth rate (%)	12.30	11.5
Per capita GSDP (US\$)	1,676.28	1,982.65

Social Indicators

Parameter	Rajasthan	India
Literacy rate (%)	66.1	73.0
Birth rate (per 1,000 population)	24.3	20.4

Industrial Infrastructure

Parameter	Rajasthan	India
Operational PPP projects (No) (November 2019)	175	1824
Operational SEZs (No) (November 2019)	3	238

Physical Infrastructure in Rajasthan

Parameter	Rajasthan	India
Installed power capacity (MW) (October 2019)	24,145.60	364,960.14
Wireless subscribers (million) (Sept 2019)	65.66	1195.24
Internet subscribers (As of June 19) (million)	38.15	665.31
National highway length (km) (March 2019)	10,342	132,499
Airports (No) (July 2018)	7	129

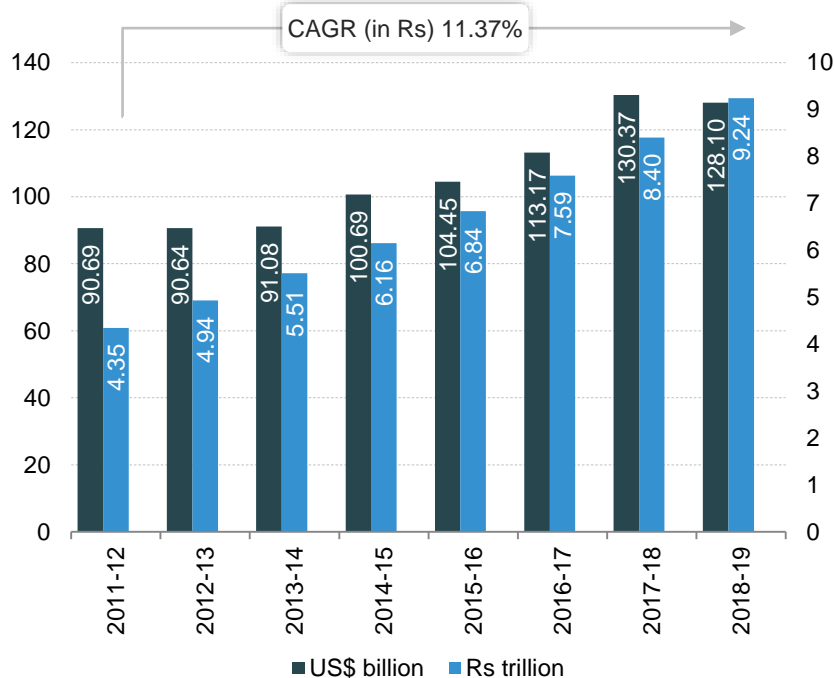
Investments (as of June 2019)

Parameter	Rajasthan	India
Cumulative FDI equity inflows since April 2000 (US\$ billion)	1.98	436.35



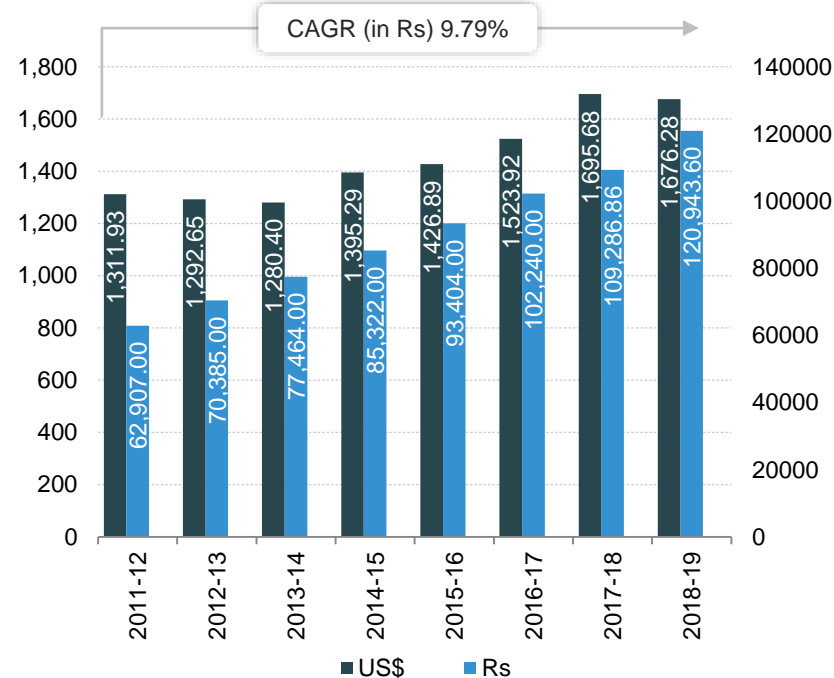
ECONOMIC SNAPSHOT

Rajasthan's GSDP at current prices



- At current prices, Rajasthan's GSDP stood at US\$ 128.10 billion in 2018-19, in comparison with US\$ 90.69 billion in 2011-12.
- Between 2011-12 and 2018-19, GSDP of Rajasthan grew at a CAGR (in Rs) of 11.37 per cent.

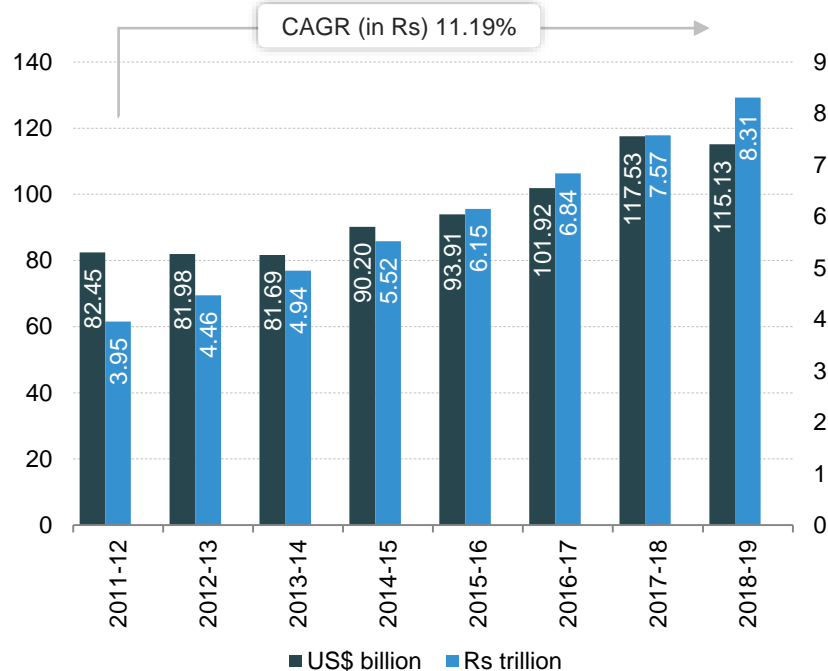
GSDP per capita of Rajasthan at current prices



- In 2018-19, Rajasthan's per capita GSDP at current prices was US\$ 1,676.28 as compared to US\$ 1,311.93 in 2011-12.
- Per capita GSDP is estimated to have increased at a CAGR (in Rs) of 9.79 per cent between 2011-12 and 2018-19.

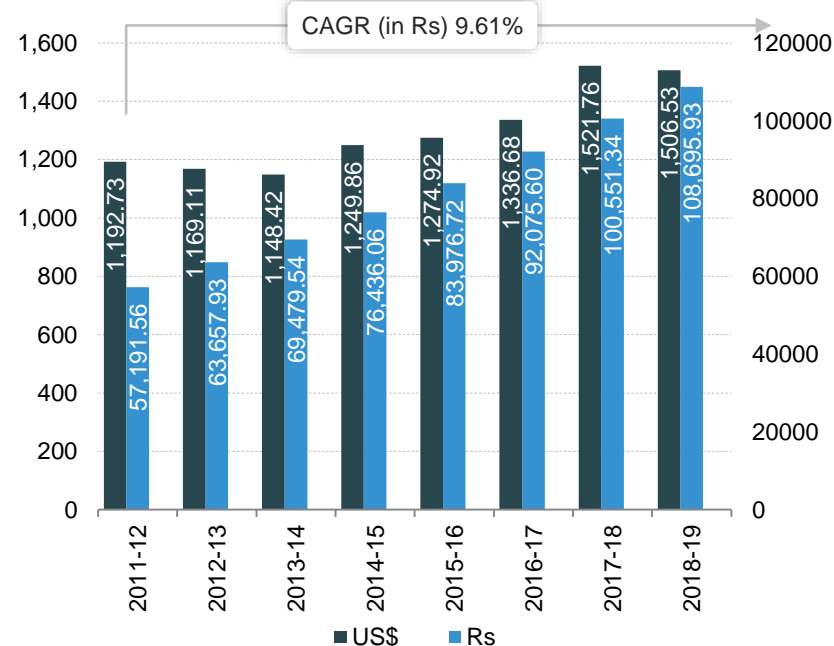
Source: MOSPI

Rajasthan's NSDP at current prices



- At current prices, net state domestic product (NSDP) stood at US\$ 115.13 billion in 2018-19, in comparison with US\$ 82.45 billion in 2011-12.
- Between 2011-12 and 2018-19, NSDP registered growth at a CAGR (in Rs) of 11.19 per cent.

NSDP per capita of Rajasthan at current prices



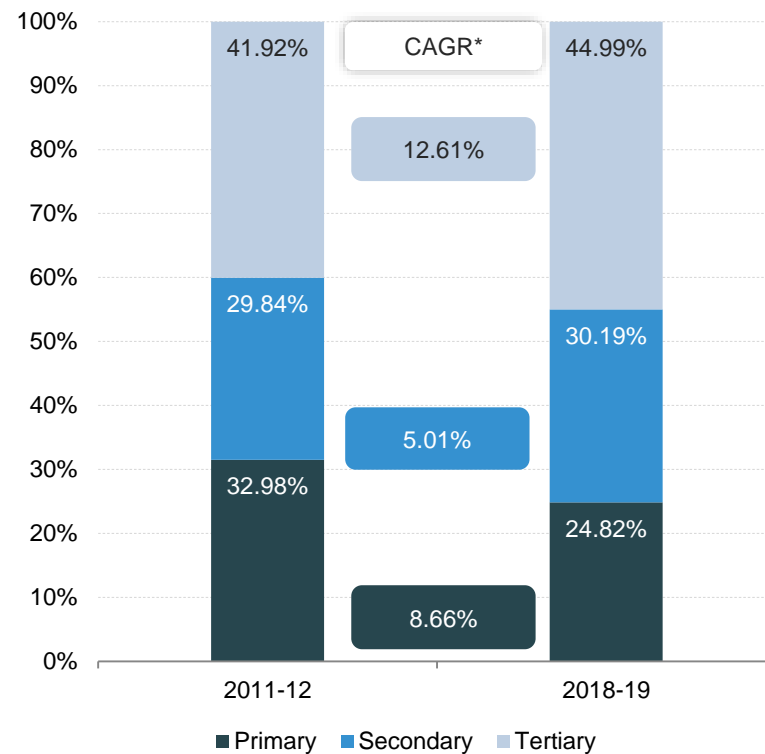
- In 2018-19, Rajasthan's per capita NSDP at current prices stood at US\$ 1,506.53 as compared to US\$ 1,192.73 in 2011-12.
- Per capita NSDP is estimated to have expanded at a CAGR (in Rs) of 9.61 per cent between 2011-12 and 2018-19.

Source: MOSPI

ECONOMIC SNAPSHOT – PERCENTAGE DISTRIBUTION OF GSDP

- In 2018-19, the services sector contributed 44.99 per cent to the state's GSDP at current prices, followed by industries (30.19 per cent) and agriculture (24.82 per cent).
- The services sector expanded at a CAGR of 12.61 per cent between 2011-12 and 2018-19.
- At a CAGR of 8.66 per cent, the primary sector reported the second fastest growth during 2011-12 to 2018-19.

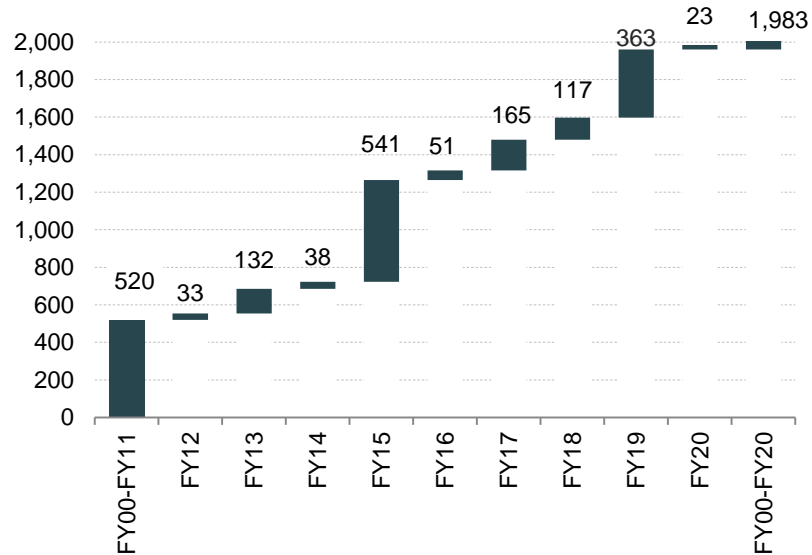
GSVA composition by sector



*Note: *in Rs terms*
Source: MOSPI

ECONOMIC SNAPSHOT – FDI INFLOWS & INVESTMENTS

FDI inflows in Rajasthan in April 2000-June 2019 (US\$ million)



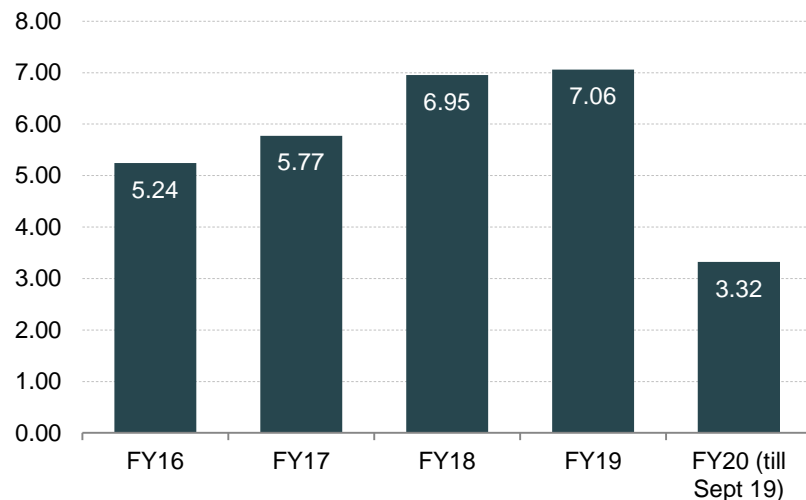
Investment Intentions filed in Rajasthan

Year	Number	Proposed Investments (US\$ million)
2015	76	1,070.04
2016	97	871.21
2017	99	1,113.64
2018	92	5,489.40
2019 (As of October 19)	88	1,224.21

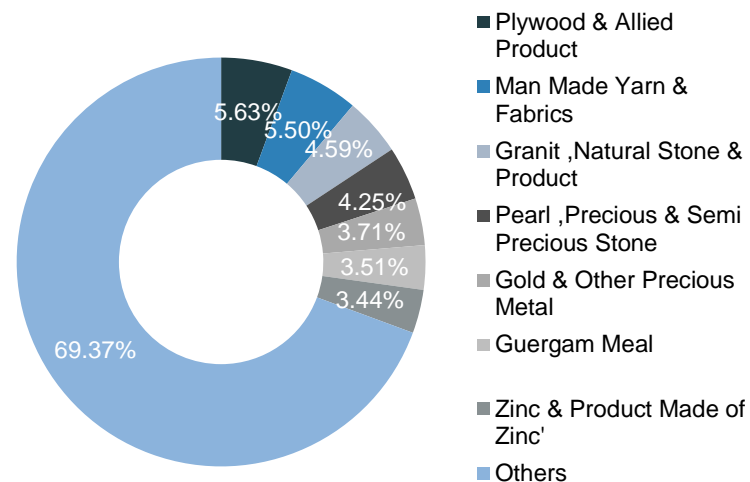
- According to the Department of Industrial Policy and Promotion (DIPP), FDI inflows in Rajasthan between April 2000 and June 2019 stood at US\$ 1.98 billion.
- During 2019 (as of October 19), 88 investment intentions were filed in the state with total investment of Rs 8,556 crore (US\$ 1.22 billion).
- As of October 2018, Vedanta Ltd is planning to invest US\$ 4.1 billion to enhance oil production from its Barmer block in Rajasthan.

Source: Department for Promotion of Industry and Internal Trade

Merchandise Exports from Rajasthan (US\$ billion)



Major Commodities Exported in FY19



- Total merchandise exports from Rajasthan were US\$ 7.06 billion in FY19. Merchandise exports during FY20 (till Sept 2019) reached US\$ 3.32 billion.
- Plywood & Allied Product, Man made yarn & Fabrics, Zinc and Granit ,Natural Stone & Product account for a majority of the share in the overall exports of the state.
- Pearls, Precious and Semi Precious Stones and Gold & Other Precious Metals are the other major products that account for a significant share in Rajasthan's export basket.

Source: DGCIS Analytics



PHYSICAL INFRASTRUCTURE

PHYSICAL INFRASTRUCTURE – ROADS

- As of March 2019, Rajasthan had 10,342 km of national highways.
- As on 31 March, 2019, state has a total road length of 2,36,572.27 km. The road density in the state is 69.12 km per 100 sq. km.
- As per Budget 2018-19, a provision of US\$ 118.32 million has been made by the state government for construction of rural roads under Gramin Gaurav Path and Missing Link schemes.
- In year 2018-19 , 50 State Highways, 39 District Roads, 15 Urban Roads and 1,783 Rural Roads have been sanctioned.

Road type	Road length (km) as of March 2019
National highways	9079.10
State highways	15543.60
Major district roads	8802.20
Other district roads	32175.41
Village roads	170971.96
Total	236572.27

Road work completion under PMGSY

Year	Road works (No)
2014-15	1,107
2015-16	939
2016-17	252
2017-18	1,501
2018-19	2,581

Source: NHAI (National Highways Authority of India, Statistics Rajasthan Government, Rajasthan Economic Survey 2018-19

PHYSICAL INFRASTRUCTURE – RAILWAYS

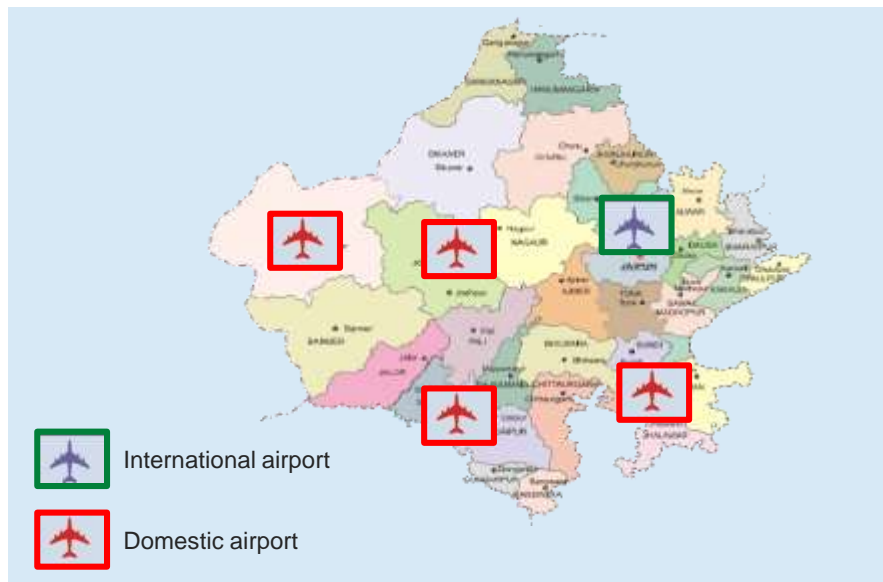
- As of March 2018, Rajasthan has a total railway network spanning 5,929 km. The railway length in state is 8.66 per cent of all India route length of 68,442 km.
- As per State Budget 2019-20, the state government allocated an amount of Rs 227 crore (US\$ 32.48 million) for the phase-I-B of metro rail project in the state.
- The Government of Rajasthan has undertaken the development of a Metro Rail Urban Transport Project in Jaipur.
 - Phase-1-A (Mansarovar to Chandpole – 12.1 km): In 2010, JMRC entered into an agreement with DMRC for Phase-1-A development on deposit work basis, encompassing 9.7 km. Work of Phase 1A has been completed. The average daily ridership for the first 46 months (June 2015 to March 2019) was 20,653.
 - Phase-1-B (Chandpole to Badi Chaupar): Comprises underground metro for 2.44 km and 2 stations. Construction work of the 2 stations is under progress.
 - Phase II (Ambabari to Sitapura – 23.1 km): Phase II is proposed to be developed on a PPP model.



Source: Maps of India

Source: State Economic Survey 2018-19, News Articles

- Domestic airports are located at Jodhpur, Udaipur, Jaisalmer, Kota and Kishanghar. The Airports Authority of India plans to operate civil airports in Jaisalmer, Jodhpur and Bikaner. An international airport is located at Jaipur.
- According to the 2018-19 Budget, the state government will undertake development of emergency landing strips on selected highways/ mega highways.
- AAI further plans to open an airport at Sawai Madhopur. An air cargo complex at Jaipur, and Inland Container Depots (ICDs) at Jaipur, Jodhpur, Bhilwara and Bhiwadi facilitate trade within and outside India.
- The airport at Jaipur has received the first rank among global airports in the Best Airport in the World in 2 to 5 million passenger category of Airport Service Quality (ASQ) awards by Airports Council International (ACI) for the year 2017.



Source: Airports Authority of India

Airport indicators in Rajasthan

No. of passengers

Airport	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20 (Till October 19)
Jaipur	1,981,951	2,197,959	2,887,195	3,783,458	4,757,178	5,471,223	28,61,130
Udaipur	435,197	457,841	711,187	1,089,899	1,147,067	1,392,210	6,51,466
Jodhpur	303,678	295,863	301,859	350,583	469,239	506,826	1,65,961

Aircraft movement

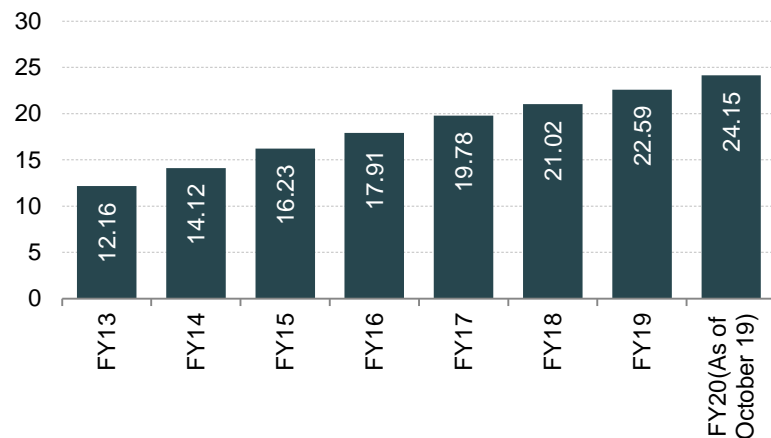
Airport	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20 (Till October 19)
Jaipur	19,808	19,852	24,034	32,340	42,289	46,185	22,570
Udaipur	5,636	5,647	7,462	9,084	9,842	11,767	5,662
Jodhpur	2,988	3,058	2,976	3,732	5,985	5,540	1,222

Freight (in tonnes)

Airport	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20 (Till October 19)
Jaipur	6,705	3,259	9,370	16,126	16,304	18,513	10,443
Udaipur	0	35	54	26	13	3	3
Jodhpur	19	12	13	8	11	7	1

Source: Airports Authority of India

Installed power capacity (GW)



Transmission network in the state (in Ckt. Km)

Voltage\Year	2015-16	2016-17	2017-18	2018-19
765 KV	425.5	425.5	425.5	425.50
400 KV	3966.65	4275.33	5640.73	7317.00
220 KV	13804.23	14500.47	15130.05	15350 .00
132 KV	16181.09	16771.05	17189.29	18012.00
Total	34377.47	35972.35	38385.57	41104 .50

- As of October 2019, Rajasthan had a total installed power generation capacity of 24,145.60 MW. This comprised of 7,570.65 MW under state owned projects, 3,774.30 MW under central sector projects and 12,800.65 MW under private sector projects.
- Out of total installed power capacity, thermal power plant contributed 12,467.17 MW, nuclear power plants contributes 556.74 MW, hydro power plant contributed 1,939.19 MW and renewable energy contributed 9,182.50 MW.
- Transmission network in the state has grown from 38385.57 ckt. Km in 2017-18 to 41104 .50 ckt. Km in 2018-19.

Note: Ckt Km – circuit kilometre
Source: Central Electricity Authority

- According to the Telecom Regulatory Authority of India (TRAI), Rajasthan had around 65.62 million wireless and 531,014 wire-line subscribers as of Sept 2019.
- As of June 2019, Rajasthan had 38.15 million internet subscribers. The state recorded a tele-density of 86.68 per cent as of September 2019.
- By the end of Sept 2019, 35.79 million subscribers had submitted request for mobile number portability in Rajasthan.

Telecom Infrastructure (As of Sept 2019)

Wireless subscribers	65,628,521
Wireline subscribers	531,014
Internet subscribers (As of June 19) (million)	38.15

Major telecom operators in Rajasthan

- Bharat Sanchar Nigam Limited (BSNL)
- Bharti Airtel
- Vodafone
- Reliance Jio

Source: Telecom Regulatory Authority of India

- Four cities of Rajasthan viz. Ajmer, Udaipur, Kota and Jaipur have been selected under the Smart Cities Mission of Government of India.
- Under Atal Mission for Rejuvenation and Urban Transformation (AMRUT), twenty-nine cities have been selected from the state.
- The state government has undertaken Rajasthan Urban Infrastructure Development Project (RUIDP) with the financial assistance of Asian Development Bank (ADB), in order to provide quality infrastructural facilities.
- Phase-III (Newly approved Project) – with loan assistance from ADB, Government of Rajasthan (GoR) approved the RUSDIP-RUIDP Phase III. This program will complement the past and ongoing efforts of GoR in order to improve water supply, sewerage, sanitation to the residents of the selected cities in Rajasthan. The total cost of the project is Rs 3,653.25 crore (US\$ 566.83 million).
- As of August 2018, under Smart City Mission, 140 projects have been completed or are under implementation in the state.
- Up to March 2019, 10.55 lakh LED lights have been setup in Rajasthan under energy saving Project.

Cities	Population	Literacy Rate
Ajmer	2,583,052	69.33%
Udaipur	3,068,420	61.82%
Kota	1,951,014	76.56%
Jaipur	6,626,178	75.51%

Source: Rajasthan Urban Infrastructure Development Project, Government of Rajasthan



SOCIAL INFRASTRUCTURE

- The state has a literacy rate of 66.1 per cent the male literacy rate is 80.5 per cent and the female literacy rate is 52.7 per cent.
- The state's school infrastructure consists of primary (40,184), upper primary (37,034) and secondary/sr. secondary (28,243).
- In total, the state had 1,729 colleges including 118 engineering colleges and 67 MBA colleges, that are functional.
- As of 2016-17, there were 223 government sanctioned industrial training institutes (ITIs) with a total sanction of 72,979 and 1,653 private ITIs providing training on 296,528 seating capacity.
- The state has around 197 polytechnics with an intake capacity of 50,585 students.
- Under State Budget 2018-19, an amount of US\$ 5.13 billion was allocated for general education.

Rajasthan's education statistics (2016-17)

Schools (No)	Primary: 40,184 Upper primary: 37,034 Secondary/senior secondary: 28,243
Colleges (No)	1,729
ITIs (No)	Government sanctioned: 223 Private sector: 1,653
Functional engineering colleges	118
Functional MBA institutions	67

Source: Economic Review of Rajasthan 2018-19

- Rajasthan has a 3-tier health infrastructure comprising primary health centres, health units, community health centres & sub-centres
- A number of initiatives such as the Chief Minister’s ‘Jeevan Raksha Scheme’ & the World Bank-assisted Rajasthan Health System Development Project have been taken up to improve healthcare facilities in the state.
- A total of 18,816 AYUSH doctors and 43,388 doctors having medical qualification were registered, as on 2018-end.
- As of December 2019, the state had 664 community health centres, 2,866 primary health centres and 14,575 sub-centres.

Health indicators (SRS Bulletin 2017)

Population served per hospital bed	1,451
Birth rate ¹	24.1
Death rate ¹	6.0
Infant mortality rate ²	38

Health infrastructure (as of December 05, 2019)

Community health centres	664
Primary health centres	2,866
Sub-Centres	14,575
Sub District Hospitals	365
District hospitals	36
Total	18,526

Life expectancy at birth (year)

Male (2016-20)	68.6
Female (2016-20)	71.9

Note: ¹Per thousand persons

Source: Economic Review of Rajasthan 2018-19, Sample Registration System (SRS),



INDUSTRIAL INFRASTRUCTURE

- Bureau of Investment Promotion (BIP) and Rajasthan Industrial Development and Investment Corporation (RIICO) are responsible for promoting investments and developing industrial infrastructure in the state.
- The Government of Rajasthan is promoting the development of several SEZs across the state for sectors such as gems and jewellery, handicrafts, IT, electronics, automotive/auto components and textiles.
- As of November 2019, the state was home to three operational SEZs, four notified SEZs, one SEZ with an in-principle approval and five SEZs with formal approvals.
- The Rajasthan Industrial Infrastructure Corporation (RIICO) has been assigned the responsibility of setting up industrial areas in the state. The organisation also provides loans for small, medium and large scale projects.

Industrial Corridors in Rajasthan



Source: Department of Industrial Policy & Promotion, State Budget 2019-20, IEM: Industrial Entrepreneurs Memorandum, Invest India

Start-up initiatives

- iStart Initiative
 - In November 2017, the state government launched a dedicated platform for startups called iStart. to facilitate entrepreneurship and job creation in the state.
 - The aim of this initiative is to assist anyone with an entrepreneurial aspiration to take their concepts and business to the next level – be it at idea/concept stage or MVP or early-growth stage startups.
 - The platform will work on the “access-improve-access” model. Startups will undergo mentoring programs and customised & group skill building to focus on areas that need to be improved.
 - Applyifi will provide entrepreneurs and investors a detailed assessment report and a 36-point score card on the startup’s potential and investment worthiness.
 - A one-month skill-building programme will be organised for startups and startups graduating from the programme will be offered opportunities to pitch their ideas for investments to the state government.
 - iStart will also focus on building a digital infrastructure in the form of a set of APIs that the government, startups, developers and businesses can utilise for solving problems faced by them.
 - A quarterly ‘Start-up Showcase Yatra’ will be organised in Mumbai, Delhi-NCR and Bengaluru to offer startups exposure to key investors and enablers of the startup ecosystem.
- In August 2018, the state government inaugurated Bhamashah Techno Hub, India’s biggest incubation centre, in Jaipur. The state-of-the-art facility is spread over 100,000 sq ft and is expected to house over 700 start-ups. Start-ups operating from the centre will receive various facilities including mentoring, funding, logistics and office space.

Source: iStart website, startup2day, News Articles

KEY SECTORS

- ❖ Agriculture and Allied Industries
- ❖ Tourism
- ❖ Mining and Mineral Processing
- ❖ Cement



KEY SECTOR – AGRICULTURE AND ALLIED INDUSTRIES

- The state has an agricultural economy with nine agro-climatic zones and various types of soil that help during the cultivation of crops.
- Food grain production is estimated to have reached 22.80 million tonnes in 2018-19. Production of cereals was estimated at 19.02 million tonnes, while that of pulses at 3.78 million tonnes during 2018-19.
- Cotton, which is an important cash crop, is primarily grown in Ganganagar and Hanumangarh districts. Production is estimated at 2.02 million bales in 2018-19.
- As per the State Budget 2019-20, an estimated outlay of Rs 8,057.51 crore (US\$ 1.15 billion) was made for agriculture in the state. Irrigation and flood control were allocated Rs 2,939.45 crore (US\$ 420.58 million).

Agricultural production ('000 tonnes)

Crop	Estimated annual production in 2018-19
Rice	453.171
Wheat	11511.53
Fruits	918.72
Vegetables	2128.77
Flowers	7.60
Aromatic & medicinal	410.00
Spices	1020.48
Honey	10.50
Cereals	19023.64
Pulses	3782.3
Oil Seeds	7696.0
Sugarcane	447.9
Cotton (lint)	2026.73

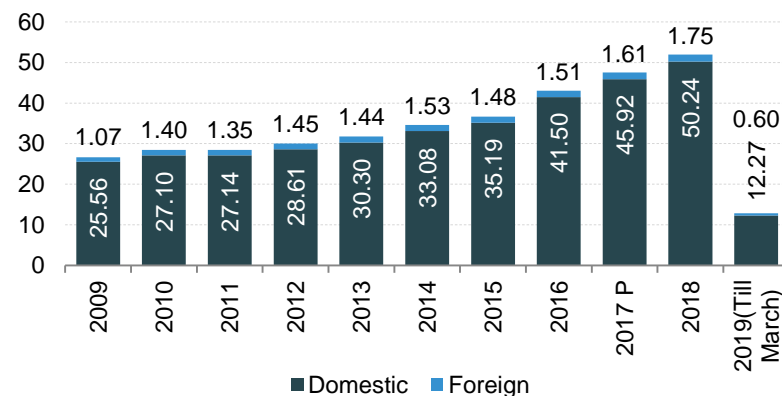
Note: ^in lakh bales (each bale of 170 kg)

Source: Ministry of Agriculture, Rajasthan Budget 2019-20, Rajasthan Economic Survey 2017-18

KEY SECTOR – TOURISM

- Developers and investors are offered attractive investment opportunities through the state's popular tourist attractions that include historic cities (Jaipur, Udaipur), wildlife sanctuaries (Sariska, Ranthambore) and deserts (Jodhpur, Jaisalmer).
- In 2018, 50.24 million domestic tourists and 1.75 million foreign tourists visited Rajasthan.
- The state runs famous luxury tourist trains such as Royal Rajasthan on Wheels and Palace on Wheels, which connect some of Rajasthan's important tourist destinations to other states.
- As per State Budget 2019-20, Rs 114.45 crore (US\$ 16.38 million) was allocated for the tourism department.

Tourist arrivals in Rajasthan (in million)



Key Hotels

- Rambagh Palace
- Rajvilas
- Udaivilas
- Fairmont
- ITC-Sheraton
- The Oberoi
- Holiday Inn
- Radisson Blu
- Le Meridien

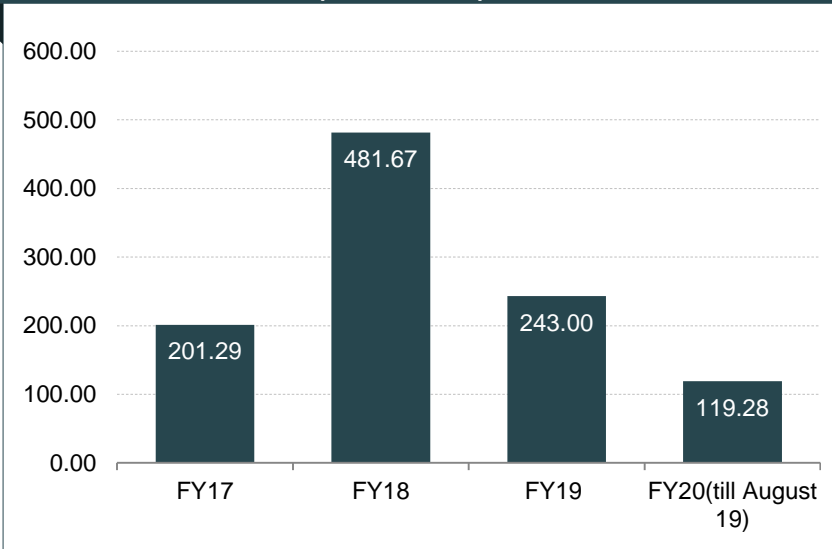
Note: P – Provisional, an update is expected in October or November 2019 from Ministry of Tourism Statistics 2019.

Source: Ministry of tourism, Government of India

KEY SECTOR – MINING AND MINERAL PROCESSING

... (1/2)

Exports of Zinc and Products Made of Zinc from Rajasthan (US\$ million)



Mineral production in the state of Rajasthan (as of Feb 19)

Mineral	Unit	2016-17	2017-18	2018-19
Lead & Zinc Ore	Tonnes	11,881,236	12,613,866	12,379,942
Copper ore	Tonnes	1,117,241	1,161,111	1,233,954
Phosphorite	Tonnes	1,112,504	1,420,966	1,043,268
Silver	Kg	460,642	557,518	598,313
Lignite	Thousand tonnes	6,902	7,606	6,757
Manganese Ore	Tonnes	2,545	7,497	8,125
Iron ore	Thousand tonnes	1,228	1,317	1,033

- Rajasthan is among the largest mineral-producing states in India. Around 81 varieties of minerals are available in the state and 57 minerals are produced on a commercial scale.
- It also contributes significantly to production of dimensional and decorative stones, such as marble, sandstone, and granite etc.
- Value of all minerals produced* during 2018-19 (as of Feb 19) in the state stood at Rs 11,534 crore (US\$ 1.65 billion).
- As of October 2018, Stonex India has invested Rs 75 crore (US\$ 10.69 million) to set up a manufacturing plant in Rajasthan. The total capacity of the facility is 10 million sq ft annually and current capacity utilisation is around 75 per cent.
- The Government of India has planned auctions of 16 mineral blocks in Rajasthan in 2018-19.

Note: *Excluding Fuel, Atomic and Minor Minerals

Source: Indian Bureau of Mines, Ministry of Mines, Government of India

Key players in mining and mineral processing industry



HINDUSTAN ZINC LIMITED

**Hindustan Zinc Ltd
(HZL)**

- HZL is a part of the Vedanta Resources Group and has four mines in Rajasthan. Rampura Agucha mine is a zinc mine with annual ore production capacity of 6.15 MTPA.
- Sindesar Khurd mine has reserves and a resource base of 85.0 million tonnes. Sindesar Khurd has annual ore production capacity of 2 million tonnes per annum (MTPA)
- The Zawar mine has a reserves and resources base of 76.4 MT, with ore production capacity of 1.2 MTPA.



Hindustan Copper Ltd

- Hindustan Copper Limited is a public sector undertaking under the administrative control of the Ministry of Mines. It is a vertically integrated copper producing company, with facilities of mining, beneficiation, smelting, refining and casting of refined copper metal into downstream-saleable products. HCL has four operating units of mines and plants, one of which is the Khetri Copper Complex (KCC) at Khetrinagar in Rajasthan.



**Rajasthan State Mines
and Minerals Limited
(RSMML)**

- RSMML is a public sector enterprise of the Government of Rajasthan, primarily engaged in mining and marketing of industrial minerals. The company has various Strategic Business Units (SBUs) in Rajasthan. The rock phosphate SBU is located at Udaipur, gypsum SBU at Bikaner, limestone SBU at Jodhpur and lignite SBU at Jaipur.



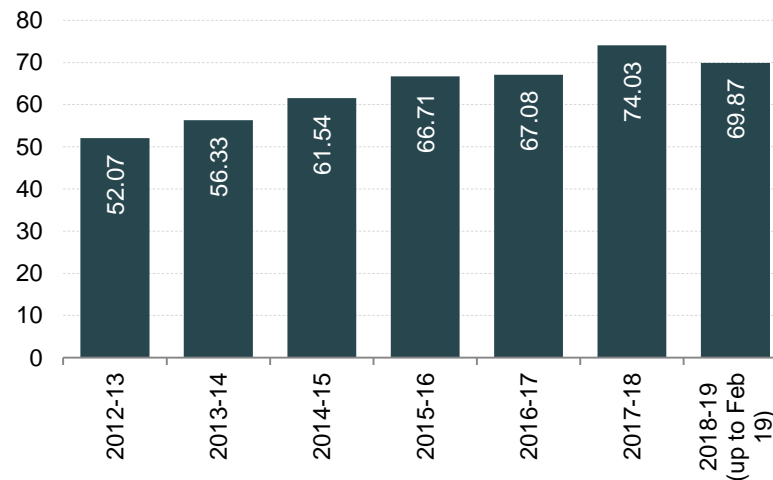
Liberty Whiteware Ltd

- Liberty Whiteware Limited has a sanitary-ware unit, located at Neemrana in Rajasthan.
- The company has an annual production capacity of 500,000 pieces.
- Company is engaged in the production of bathroom products includes shower trays, wash basins and sinks.

KEY SECTOR – CEMENT ... (1/2)

- The state is the leading producer of cement grade limestone in India. Production of limestone during 2018-19 (up to Feb 19) reached 69.8 million tonnes.
- As of 2016-17, cement production capacity of cement plants in the state was estimated at 61.13 million tonnes.#
- The state has about 26 per cent share in proven limestone reserves in the country.^
- Ultratech Cement is setting up a 3.5 MTPA greenfield integrated cement plant in Rajasthan with an investment of Rs 1,850 crore (US\$ 287.76 million). Commercial production from the plant is expected to begin by June 2020.
- In August 2019, Wonder Cement announced set up of its third cement plant at Nimbahera in Rajasthan's Chittorgarh district.

Limestone production (in million tonnes)



Key players

- ACC
- Ambuja Cement
- Grasim Industries
- Shree Cement
- Ultratech Cement

Note: ^proven limestone reserves – STD111, #As per Indian Minerals Yearbook 2017 – an update is expected in 2019,
Source: Indian Bureau of Mines

Key players in cement industry



ACC Ltd

- ACC is the largest cement producer in India; its plant at Lakheri (Bundi), Rajasthan, has a production capacity of 1.5 MTPA. The company is also one of the largest manufacturers of ready-mix concrete in India.



Ambuja Cements Ltd

- Ambuja Cements Limited has cement plants in Rajasthan, Maharashtra, Gujarat, Himachal Pradesh, Punjab, Chhattisgarh, Uttar Pradesh and West Bengal.
- The production facility in Rajasthan has a capacity of 2.8 MTPA. The company has an integrated cement plant at Rabriyawas, District Pali, Rajasthan.



Shree Cement

- Shree Cement is the largest cement manufacturer in North India and among the top six cement manufacturing groups in the country. The company sells cement under the brands of Shree Ultra, Bangur and Rockstrong.
- Shree Cement has manufacturing plants at Beawar, Ras, Khushkhera, Suratgarh and Jaipur in Rajasthan.



- Grasim Industries Limited is a flagship company of the Aditya Birla Group.
- Grasim's subsidiary UltraTech Cement has 20 integrated plants, 26 grinding units, seven bulk terminals, one clinkerisation plant and 101 ready-mix concrete plants across India, the UAE, Bahrain, Bangladesh and Sri Lanka.
- UltraTech Cement has a capacity of 102.75 MTPA. The company has plants at Kotputli and Shambhupura in Rajasthan.



KEY POLICIES AND PROCEDURES

SINGLE-WINDOW APPROVAL MECHANISM

- Rajasthan's Single Window Clearance System (SWCS) is a single point of contact to reduce the time and efforts involved in various clearances and approvals of layouts/applications for the proposed investment submitted by investors. This online application shall render transparency to the system, thereby facilitating investors with expeditious and time-bound clearances and approvals.
- This system has come into effect from 1 April 2011 in all the districts of the state.
- Application through SWCS is mandatory for all projects involving investments above US\$ 165,893.
- This system will grant permissions, invoking and using clearance mechanism, in case of failure of the original competent authorities to decide on application within the specified time. This system will serve as a single point interface between investors and various Government departments.
- SWCS will provide an electronic-based transparent system for online tracking of application/forms and also keep entrepreneurs updated on information relating to relevant rules, regulations, orders, policy initiatives and schemes for guidance.
- With the introduction of the Single Window Ordinance/Act and Single Window Clearance Portal, setting up and operationalising projects and investment proposals in the state is expected to become a speedy, uninterrupted and hassle-free process.
- Investor also has the right to appeal against the decision of rejection by the Department before the State Empowered Committee.

KEY INVESTMENT PROMOTION OFFICES ... (1/3)

Agency	Description	Contact information
Bureau of Investment Promotion (BIP)	<ul style="list-style-type: none"> ▪ BIP is a nodal agency of the Government of Rajasthan that facilitates investments in various sectors in the state. It provides one stop service, mainly for large projects, by acting as an interface between entrepreneurs and the Government. ▪ Role of BIP in Rajasthan: <ul style="list-style-type: none"> • Identifying investment opportunities. • Providing access to information that is critical for setting up of projects. • Assisting translation of investment possibilities into concrete investment proposals. • Nodal agency for single-window clearances. • Facilitation on behalf of investors with all Government departments /agencies to ensure that proposals get immediate attention. • Assisting in site selection and obtaining infrastructural facilities. • Interfacing with Government departments for required clearances. 	<p>Udyog Bhawan, Tilak Marg Jaipur - 302005, Rajasthan Phone: 91-141-2227 274, 2227 812, 2227 713 Fax: 91-141- 2227 506 E-mail: bip.raj@nic.in Website: http://resurgent.rajasthan.gov.in/</p>

KEY INVESTMENT PROMOTION OFFICES ... (2/3)

Agency	Description	Contact information
<p>Rajasthan State Industrial Development and Investment Corporation (RIICO)</p>	<ul style="list-style-type: none"> ▪ RIICO is the sole agency in the state that develops land for industrial growth. It provides financial assistance and other vital infrastructural facilities for industries. ▪ Role of RIICO: <ul style="list-style-type: none"> • Identifying investment opportunities. • Providing access to information that is critical for setting up of projects. • Assisting translation of investment possibilities into concrete investment proposals. • Nodal agency for single-window clearances. • Facilitation on behalf of investors with all Government departments /agencies to ensure that proposals get immediate attention. • Assisting in site selection and obtaining infrastructural facilities. • Interfacing with Government departments for required clearances. 	<p>Udyog Bhawan, Tilak Marg Jaipur, Rajasthan</p> <p>Phone: 91-141-5113 201 / 222 7751-55</p> <p>E-mail: riico@riico.co.in</p> <p>Website: http://www.riico.co.in/</p>

KEY INVESTMENT PROMOTION OFFICES ... (3/3)

Agency	Description	Contact information
Rajasthan Financial Corporation (RFC)	RFC provides medium- and long-term loans for new industrial units in the SME sector. It also assists in planning a balanced development of industries in the state.	Udyog Bhawan, Tilak Marg Jaipur - 302005, Rajasthan Phone: 91-141-2385 522 Fax: 91-141-2385 503 E-mail: info@rfc.rajasthan.gov.in Website: http://rfcapp.industries.rajasthan.gov.in/
PDCOR Limited	PDCOR Limited (PDCOR) is a company jointly promoted by the Government of Rajasthan and Infrastructure Leasing & Financial Services Limited (IL&FS) to facilitate private sector investment in the infrastructure sector of Rajasthan.	First Floor, LIC Jeevan Nidhi Building Near Ambedkar Circle, Bhawani Singh Road, Jaipur - 302005, Rajasthan Phone: 91-141-2747012-14 Fax: 91-141-2747045 E-mail: info@pdcor.com Website: http://www.pdcor.com/

KEY APPROVALS REQUIRED ... (1/3)

Permission and clearances required	Respective departments/ organisations of state	Time limit (within working days)
Land conversion	Revenue department	<ul style="list-style-type: none"> Up to 10 hectares: 30 days from submission of completed application to district collector. Above 10 hectares: 60 days from submission of completed application to State Government.
Land allotment		<ul style="list-style-type: none"> In case the allotment is to be made at the district level: 30 days from submission of completed application to district collector. In case Government's approval is required: 60 days from submission of completed application to the State Government.
Exemption in the land ceiling limit		<ul style="list-style-type: none"> 60 days at the level of State Government from the date of submission of application in the district collector's office.
Permission for land use (In case industry is located outside an industrial area)		<ul style="list-style-type: none"> a) IDCO b) Department of Town and Country Planning c) Local authority/District Collector
No-Objection Certificate (NOC) and consent under Water and Air Pollution Control Act		<ul style="list-style-type: none"> Orissa State Pollution Control Board (OSPCB)

Source: Industries Department Notification, News Articles

KEY APPROVALS REQUIRED ... (2/3)

Permission and clearances required	Respective departments/ organisations of state	Time limit (within working days)
Release of power connection	Energy Department (Jaipur Vidyut Vitran Nigam Ltd)	<p>For loads up to 25 kW:</p> <ul style="list-style-type: none"> ▪ Issue of demand notice: 21 days from receipt of application. ▪ Release of connection: 30 days after compliance of demand notice if no augmentation is required. Otherwise 45 days. <p>For loads above 25 kW and up to 300 kW:</p> <ul style="list-style-type: none"> ▪ Issue of demand notice: 21 days from receipt of application. ▪ Release of connection: 60 days after compliance of demand notice. <p>For loads above 300 kW and up to 2,000 kW</p> <ul style="list-style-type: none"> ▪ Issue of demand notice: 21 days from receipt of application. ▪ Release of connection: 60 days after compliance of demand notice. <p>For loads above 2,000 kW and up to 3,000 kW:</p> <ul style="list-style-type: none"> ▪ Issue of demand notice: 60 days from receipt of application. ▪ Release of connection: 60 days after compliance of demand notice.

Source: Industries Department Notification, News Articles

KEY APPROVALS REQUIRED ... (3/3)

Permission and clearances required	Respective departments/ organisations of state	Time limit (within working days)
Release of power connection	Energy Department (Jaipur Vidyut Vitran Nigam Ltd)	For loads above 3,000 kW and up to 5,000 kW: <ul style="list-style-type: none"> ▪ Issue of demand notice: 21 days from receipt of application. ▪ Release of connection: 120 days after compliance of demand notice.
Sanction of loan	Rajasthan State Industrial Development and Investment Corporation (RIICO)	40 days
Allotment of plots in industrial area		30 days
Registration under the VAT Act	Commercial Taxes Department	24 hours
Registration under the CST Act		24 hours
Tax clearance certificate		One day in case of non-default of tax payment
Drug Licence – Wholesale		15 days
Drug Licence – Retail	Medical and Health Directorate	15 days
Manufacturing of gauge bandage, cotton, repacking		45 days

Source: Industries Department Notification, News Articles

COST OF DOING BUSINESS IN RAJASTHAN

Cost parameter	Cost estimate	Source
Industrial land (per sq ft)	US\$ 70 to US\$ 130	Industry sources
Labour cost (minimum wages per day)	US\$ 3.0 to US\$ 5.5	Ministry of Labour and Employment, Government of India, April 2014
Hotel costs (five star)	US\$ 95 to US\$ 385 per room per night	Leading hotels in the state
Office space rental (per sq ft)	US\$ 0.22 to US\$ 2.5 per month	Industry sources
Residential space rental	US\$ 0.05 to US\$ 0.28 per sq ft per month (rates depend on the type of structure and location)	Industry sources
Power cost (per kWh)	Domestic: 7.9 cents (US), Commercial: 11.3 cents (US), Industrial: 9.7 cents (US), Agriculture: 2.5 cents (US)	DCH Databook, October 2013

Objectives

Rajasthan Solar Energy Policy 2019

- To develop a global hub of solar power of 50GW capacity in next 5-6 years to meet energy requirements of Rajasthan and India.
- To create an R&D hub for deployment of various combinations of RE power technologies and Wind-Solar based hybrid, co-generation technologies which will focus on improving efficiency in existing applications and will reduce the cost of balance of system.

[Read more](#)

Rajasthan Start-up and Innovation Policy 2019

- The policy will be in force for a period of five years.
- Key objectives of the policy are to operationalized and manage government owned 10 incubators, support 2,000 startups, mobilise US\$ 14.31 million of Angel and Venture Capital and develop an innovation culture in the state.
- It also aims to create employment opportunity for 10 million people in state
- Efforts will be made to provide relevant benefits available under various schemes of the central and state government to all startups.
- A major startup fest and two mini startup fests will be organised to provide national and international visibility to startups.

[Read more](#)

Objectives

E-Governance and IT/ITeS Policy, 2015

- Released in November, 2015, the main objective of the policy is to bring the citizens and public services closer to one another.
- Provision of IT for good governance in the state.
- Enhanced investments in IT/ITeS, ESDM and robotics sector for promoting economic development of the state.
- Achieving efficiency, transparency and reliability in different public services to improve these services by controlling e-Governance in the state.

[Read more](#)

Rajasthan Mineral Policy 2015

- The Rajasthan Mineral Policy 2015 aims at providing a favourable framework for the legal, procedural, fiscal as well as regulatory aspects in the investment system.
- The other objective of the policy is to improve the exploration of the mineral wealth of Rajasthan through various in-house facilities and by outsourcing different enhanced techniques.
- To enhance and improve the employment opportunities in the state.

[Read more](#)

Biotech Policy 2015

- Positioning Rajasthan as an attractive destination for the biotech industry.
- Creating and upgrading biotechnology infrastructure.
- Creating quality infrastructure for research and commercial activities.
- Creating a strong base in academics
- Creating most basic understanding about the sector
- Human resources should be generated for the sector
- More and more biotech industries should be invited in the state

[Read more](#)

Objectives

Tourism Policy of Rajasthan

- The Rajasthan Tourism Unit Policy, 2015 is expected to reinforce existing infrastructure
- It will encourage infrastructural development
- It will generate income as well as employment and will also increase the availability of rooms in hotels for tourists
- Rural tourism is expected to increase with opening up of heritage hotels in the rural or panchayat areas

[Read more](#)

Rajasthan Solar Energy Policy, 2014

- To reduce dependence on conventional sources of energy by promoting the development of non-conventional energy sources, especially solar power.
- To help Rajasthan attain self-sufficiency in its energy needs.
- To facilitate installation of 25,000 MW solar power through state or private enterprises or through public private partnerships or through individual efforts.

[Read more](#)

Policy for Promoting Generation of Electricity from Wind, 2012

- To promote generation of power from wind.
- To offer solutions to various problems faced by developers, power producers and utilities.
- Renewable Purchase Obligation (RPO) has been increased to 6.8%.

[Read more](#)

Policy for Promoting Generation of Electricity from Biomass, 2010

- To promote generation of power from biomass.
- To offer solutions to various problems faced by developers, investors, Independent Power Producers (IPPs) and utilities.

[Read more](#)

Objectives

Rajasthan Investment Promotion Scheme, 2014

- To promote investment in the state and generate employment opportunities through such investment
- **Benefits to Manufacturing Enterprises**
 - Exemption from payment of 50 per cent of land tax for seven years
 - Exemption from payment of 50 per cent of electricity duty for seven years
- **Benefits to Services Enterprises**
 - Exemption from payment of 50 per cent of Entertainment Tax for seven years
 - Exemption from payment of 50 per cent of land tax for seven years
 - Exemption from payment of 50 per cent of electricity duty for seven years

[Read more](#)

Rajasthan Agro-Processing and Agri-Marketing Promotion Policy - 2015

- To create supply chain infrastructure needed for agro industrial development.
- To encourage value addition in agricultural produce and to reduce post-harvest losses.
- To bring in new technologies and practices to modernise agro-processing and marketing.
- To increase the export of value added agri-products from the State
- To accelerate a close interface among research, extension, industries and farmer in agri-sector.

[Read more](#)

Rajasthan State Environment Policy, 2010

- Conserve and enhance environmental resources.
- Assure environmental sustainability of key economic sectors.
- Improve environmental governance and build capacity.

[Read more](#)



ANNEXURE

ANNEXURE...(1/2)- SOURCES

Data	Sources
GSDP (state)	Ministry of Statistics and Programme Implementation
Per capita GSDP figures	Ministry of Statistics and Programme Implementation
GSDP (India)	Ministry of Statistics and Programme Implementation
Installed power capacity (MW)	Central Electricity Authority, as of October 2019
Wireless subscribers (No)	Telecom Regulatory Authority of India, as of September 2019
Internet subscribers (Mn)	Telecom Regulatory Authority of India, as of June 2019
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)	Census 2011
Cumulative FDI equity inflows (US\$ billion)	Department for Promotion of Industry and Internal Trade, April 2000 to June 2019
Operational PPP projects (No)	DEA , Ministry of Finance, Government of India
Operational SEZs (No)	Ministry of Commerce & Industry, Department of Commerce, December 2018

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

DISCLAIMER

India Brand Equity Foundation (IBEF) engaged TechSci Research to prepare this presentation and the same has been prepared by TechSci Research in consultation with IBEF.

All rights reserved. All copyright in this presentation and related works is solely and exclusively owned by IBEF. The same may not be reproduced, wholly or in part in any material form (including photocopying or storing it in any medium by electronic means and whether or not transiently or incidentally to some other use of this presentation), modified or in any manner communicated to any third party except with the written approval of IBEF.

This presentation is for information purposes only. While due care has been taken during the compilation of this presentation to ensure that the information is accurate to the best of TechSci Research and IBEF's knowledge and belief, the content is not to be construed in any manner whatsoever as a substitute for professional advice.

TechSci Research and IBEF neither recommend nor endorse any specific products or services that may have been mentioned in this presentation and nor do they assume any liability or responsibility for the outcome of decisions taken as a result of any reliance placed on this presentation.

Neither TechSci Research nor IBEF shall be liable for any direct or indirect damages that may arise due to any act or omission on the part of the user due to any reliance placed or guidance taken from any portion of this presentation.