Invest India, the National Investment Promotion and Facilitation Agency of the Government of India, is mandated to facilitate investments in India. Besides investor targeting and facilitation, Invest India runs effective programs for resolving issues and grievances of existing investors through its after-care programs.

A 150+ member team provides sector and state-specific investment opportunities, advises investors on regulatory procedures and clearances, and forms India’s investment potential through the entire investment process. Invest India’s team comprises of highly educated and experienced professionals, with prior experience of working with foreign multinationals across areas such as investment banking, consulting, corporate strategy, taxation and tax.

Headquartered at New Delhi, Invest India coordinates with all Indian stakeholders such as central ministries, state governments, Indian missions across the globe, regulatory bodies, industry chambers, etc. In addition, Invest India has forged partnerships with a large number of foreign stakeholders such as foreign missions and trade offices in India, investment promotion agencies for key FDI source countries, export industry associations and bilateral chambers. The firm has a strong working relationship with all Indian states and union territories, where it seeks to build capacity, formulation of regional plans for investment facilitation and industrial cluster development.

Invest India, set up in 2009, is a non-profit venture under the Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, Government of India. Currently, it manages key national missions and initiatives such as Make in India, Startup India, Project Monitoring Group, Accelerating Growth of New India’s Innovations (AGNI), India Investment Grid (IIG) and Industrial Information System (IIS).

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The firm provides investors, developers, local corporates and multinational companies with a comprehensive range of services. These include business strategy, market research & advisory, transaction management, project development, facility management and property asset management. These services cover various asset classes such as commercial, industrial, retail, warehousing and logistics, hospitality, healthcare, senior living, data center and education.

JLL India is the leading global real estate services firm, providing a complete range of services in the commercial, retail, hospitality, industrial, residential and investment management sectors. We have over 17,000 professionals and 300 locations worldwide. We are the leading property consultant with the largest presence and network of offices in India, with a presence in over 100 cities and 1,000+ locations across the country.

JLL (NYSE: JLL) is a leading professional services firm that specialises in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of $16.3 billion, operations in over 80 countries and a global workforce of over 90,000 as of December 31, 2018. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit www.jll.com
Hyderabad has emerged as the second silicon valley of India and is often referred to as Cyberabad. The region is a significant contributor to the IT, pharma, bio-tech, medical devices, aerospace, defence and ESDM sectors.

Hyderabad

GSDP Growth Rate (FY18): 10.2%
HDI Rank (2018): 9th Rank
Logistic Performance Index (2019): 8th Rank

Telangana State Industrial Project Approval and Self-Certification System (TS-iPASS)
Speedy processing of applications for various clearances for setting up of industries at a single point
- Definitive timeframe (ranging from 1 - 30 days)
- Penalties on government officers for any delays in granting approvals

Policy & Institutional Support – Proactive government
- Telangana ICT Policy, 2016
- Telangana Electronics Policy, 2016
- Telangana Innovation Policy, 2016
- Exclusive Data Center policy (first in India)
- IMAGE Policy, 2016 (Animation & Gaming)

Telangana contributes:
- 50% of India’s bulk drugs exports
- 10% of global generics drugs volume

Telangana State’s contribution to India’s Exports (FY19): 10th Rank, 6.4%
Logistic Performance Index (2019): 8th Rank

Telangana’s contribution to India’s Exports (FY19):
- INR 210 bn
- 12th Rank
- 10th Rank
- 50% of India’s bulk drugs exports
- 10% of global generics drugs volume
- HDI Rank (2018): 9th Rank
- Logistic Performance Index (2019): 8th Rank
- No. of Factories in State (FY 18): 15,263; 6th Rank
- State’s contribution to India’s Exports (FY19): 10th Rank, 6.4%
- GSDP Growth Rate (FY18): 10.2%
- HDI Rank (2018): 9th Rank

Note: Excludes Union Territories

Quli Qutb Shahi Tombs, Hyderabad
WHY HYDERABAD?

Central Location: A key to access large hinterland

- 1/3rd of global vaccine production
- 2/5th of domestic pharma production
- 16% of India’s software exports
- 1/5th of national defence production
- 53 IT SEZs Largest cluster of IT SEZs in the country

Hyderabad is giving stiff competition to Bengaluru in the absorption rate of Grade A commercial office space for R&D centers and IT companies.

Apple, Amazon, Facebook, Microsoft, Uber, Google (ongoing), Qualcomm (ongoing) – largest campus outside the US

Skilled labor pool:

- 18 ITIs (vocational training centers) in the Hyderabad Metropolitan Region (HMR) and its vicinity.
- Source: Dept. of Employment & Training, Govt. of Telangana

Amazon India Headquarters, Hyderabad

SECTOR SNAPSHOT

Prominent industrial areas for greenfield and secondary transactions

<table>
<thead>
<tr>
<th>Industrial Park</th>
<th>Total Area (Acers)</th>
<th>Major Occupiers</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kakatiya Mega Textile Park</td>
<td>1,190</td>
<td>Upcoming</td>
<td>Biggest textile park in India. Envisioned for an integrated value chain model of “Door to fabric” facility. Youngone is the anchor investor.</td>
</tr>
<tr>
<td>Hyderabad Phamacity</td>
<td>19,333</td>
<td>Upcoming</td>
<td>Proposed integrated development with objective to set up the entire value chain of the pharmaceutical industry.</td>
</tr>
<tr>
<td>EMC ECity</td>
<td>603</td>
<td>Upcoming</td>
<td>Greenfield electronics manufacturing cluster.</td>
</tr>
<tr>
<td>EMC Maheshwaram</td>
<td>302</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IPK Knowledge Park</td>
<td>200</td>
<td>Laurus, USP, Du Pont, Acama, Escienta Biopharma, Sai Life Sciences, Biological E</td>
<td>Part of Genomics Valley, India’s first organized R&amp;D cluster.</td>
</tr>
<tr>
<td>MN Park</td>
<td>400</td>
<td>TCI-Chemicals, Miylan, Novartis, GSK, Almirac</td>
<td>Ready-to-use multi-tenanted modular wet labs and land for customization of R&amp;D facilities.</td>
</tr>
<tr>
<td>Medical Devices Park, Sultanpur</td>
<td>250</td>
<td>Apollo Hospitals, Cyient, Sahajanand Medical Technologies</td>
<td>India’s first Industrial Park to offer turnkey fully fitted lab &amp; office spaces.</td>
</tr>
<tr>
<td>GMR Aerospace Park</td>
<td>5,500</td>
<td>Citcom, Cyient, Safnan</td>
<td>Automobiles, Electronics and Float Glass.</td>
</tr>
<tr>
<td>Adibhatta Aerospace SEZ</td>
<td>337.8</td>
<td>TATA Advanced Systems Limited, JV units with Lockheed Martin, Sikorsky &amp; GE</td>
<td>Focus greenfield industrial area for ESDM.</td>
</tr>
<tr>
<td>Zaheerabad NIMZ</td>
<td>32.67</td>
<td>Upcoming</td>
<td>Automotive &amp; auto ancillary cluster.</td>
</tr>
</tbody>
</table>

Emerging Sectors

- Pharma City (upcoming) – World’s largest integrated industrial cluster for pharmaceuticals
- Bharat Biotech – World’s first company to file a Zika virus vaccine candidate patent
- Niche focus: High-skill and superior technology manufacturing sectors:
  - Drone technology
  - Nano-sciences
  - Artificial intelligence
  - Self-driven car technology

T-HUB: India’s largest technology incubator, is a first-of-its-kind PPP. Inaugurated in 2015. 451 startups incubated till Jan 2019.

B-HUB (Biotech Hub): Announced in 2018, a scaled-up manufacturing facility for biopharma SME companies, with斯坦key investments.

The map of Industrial clusters can be identified in Kompally – Motors, Shamshabad, Chicquapally – IPCL – Nalgonda and Park City – Balanagar. The land rates in these corridors range between INR 3,700 to INR 13,800 per sqm. The rates mentioned are indicative and may vary on other parameters as well.
Bharat Biotech is the youngest Indian vaccine manufacturer of multiple human vaccines. Hyderabad is close to the centre of India & easily accessible. The city has eminent scientific institutions such as Center for Cellular & Molecular Biology, Indian Institute of Chemical Technology, Jawaharlal Nehru Technological University, Osmania University, Central University of Hyderabad, three other vaccine manufacturing companies, Hub for Bulk Drugs & highly ranked pharmaceutical formulation & filling companies & cosmopolitan capital city.

- Dr. G. F. I. A. Harshavardhan, Director, Bharat Biotech International Ltd.

Hyderabad continues to be an attractive location when looking at several key criteria including access to a highly educated science and digital talent pool with extensive pharmaceutical experience, a mature global services delivery centre and cost effectiveness. Hyderabad has a strong innovation ecosystem with T-Hub being India’s largest start-up incubator. The city is the bedrock for technology driven firms through a fast modernising infrastructure and availability of talent.

- Sanjay Mundleshwar, Country President, Novartis