PUNJAB'S UNIQUE MODEL FOR EASE OF DOING BUSINESS

INVEST PUNJAB
BUSINESS FIRST

INVESTMENTS
1 Office
Invest Punjab
1 Officer
CEO, Invest Punjab
1 Portal
www.investpunjab.gov.in
1 Email
invest@investpunjab.gov.in

Investment Promotion Agency | Unified Regulator | Aftercare Agency

WE COMMIT. WE DELIVER.
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- Punjab: Emerging IT/ITeS and ESDM Hub
- Advantage Punjab: The Next Generation Investment Destination
- Investment Opportunities
The market size of IT/ITeS is expected to grow to USD 350 billion by 2025 (INR 24.5 Lakhs Crore).

<table>
<thead>
<tr>
<th>Domestic (USD bn)</th>
<th>Export (USD bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>34</td>
<td>35</td>
</tr>
<tr>
<td>37</td>
<td>41</td>
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<tr>
<td>FY 13</td>
<td>FY14</td>
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<td>108</td>
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<tr>
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<td>FY18</td>
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<td>154</td>
<td>167</td>
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<tr>
<td>FY 2025</td>
<td></td>
</tr>
<tr>
<td>350</td>
<td></td>
</tr>
</tbody>
</table>

Source: India Brand Equity Foundation, Invest India, Make in India, NPE

**INDIA IT/ITES INDUSTRY REVENUE (USD BN)**

- **1 USD=70 INR**

**Snapshot of IT/ITeS and ESDM Sector**

- **ESDM**
  - The Indian electronics hardware market is one of the largest in the world and is expected to reach USD 400 billion (INR 28 Lakhs Crore) in 2025 from USD 59 billion (INR 4.13 Lakhs Crore) in 2017-18.
  - **FDI** (INR 0.42 Lakhs Crore) (2017-18) (2nd largest sector in FDI inflows)
  - USD 6 billion FDI (INR 3,164 Crore) up from USD 197 million (INR 1,379 Crore) (2017-18) USD 452 million (2018-19)
  - **Share in GDP** 2.3%
  - **CAGR** 26.7%

**FDI (INR 0.42 Lakhs Crore) (2017-18)**

- **USD 6 billion FDI** (INR 3,164 Crore) up from USD 197 million (INR 1,379 Crore) (2017-18)
  - USD 452 million (2018-19)
  - **Share in GDP** 2.3%
  - **CAGR** 26.7%
Snapshot of IT/ITeS and ESDM Sector

**IT/ITeS**

- **Share in GDP**: 8%
- **Share in services export**: 45%
- **Share in global outsourcing market**: 56%
- **FDI**
  - **USD 6 billion** (INR 0.42 Lakhs Crore) (2017-18)
  - (2nd largest sector in FDI inflows)
- **Employment**
  - **4 million** (FY 2017-18)

The market size of IT/ITeS is expected to grow to **USD 350 billion by 2025** (INR 24.5 Lakhs Crore).

**INDIA IT/ITES INDUSTRY REVENUE (USD BN)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic (USD bn)</th>
<th>Export (USD bn)</th>
<th>Total (USD bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 13</td>
<td>76</td>
<td>32</td>
<td>108</td>
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<tr>
<td>FY 14</td>
<td>87</td>
<td>34</td>
<td>121</td>
</tr>
<tr>
<td>FY 15</td>
<td>98.5</td>
<td>35</td>
<td>133.5</td>
</tr>
<tr>
<td>FY 16</td>
<td>108</td>
<td>37</td>
<td>145</td>
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<tr>
<td>FY 17</td>
<td>117</td>
<td>37</td>
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</tr>
<tr>
<td>FY 18</td>
<td>126</td>
<td>41</td>
<td>167</td>
</tr>
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<td>FY 2025</td>
<td>350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ESDM**

The Indian electronics hardware market is one of the largest in the world and is expected to reach **USD 400 billion** (INR 28 Lakhs Crore) in **2025** from **USD 59 billion** (INR 4.13 Lakhs Crore) in **2017-18**.

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- **Share in GDP**: 2.3%
- **CAGR**: 26.7%

Source: India Brand Equity Foundation, Invest India, Make in India, NPE
Drivers of India’s IT/ITES Sector

Growing Demand
- Rising domestic demand led by BFSI, Healthcare, Retail & eCommerce
- Global BPM spending estimated to reach USD 233 billion (INR 16.31 Lakhs Crore) by 2020
- Growing demand from APAC, Latin America and Middle East
- New opportunities due to emerging technologies such as AI/Blockchain/Data Analytics

Infrastructure
- 231 exporting SEZs across the country to create employment, boost exports and encourage infrastructure development
- 57 Software Technology Parks of India (STPI) centers across the country
- Robust IT Infra like country-wide OFC network, broadband coverage, IT parks etc

Human Capital
- Presence of highly skilled, English speaking workforce
- Digitally skilled talent pool of 450,000-500,000 professionals
- Approximately 780,000 engineering graduates annually
- NASSCOM platform launched to train 2 million technology professionals and additional 2 million potential employees and students

Policy
- 100% FDI permitted under automatic route
- Focus sector under Make in India
- National Policy on software products (2019) to promote software development, create 35 lakh jobs by 2025, & nurture 10000 startups
- Dedicated software product development fund being created with a corpus of INR 1000 crore
- Thrust on Artificial Intelligence (AI) usage across all sectors

Source: India Brand Equity Foundation, Make in India, NPE 2019, NPS 2019, MeitY, WEF
Drivers of India’s ESDM Sector

Growing Demand
- Poised to be the 3rd largest consumer economy in the world
- 2nd largest digital base in the world
- Increasing per capita income and resultant change in lifestyle
- Expected growth from Tier 2 & 3 cities
- Increased presence of organized retail
- Huge demand for electronic goods in the Middle-Eastern countries, emerging markets such as North Africa and Latin America

Infrastructure
- Under Electronics Manufacturing Cluster (EMC) Scheme - 20 greenfield EMCs and 3 brownfield EMCs being set-up to attract investment of INR 54,836 crore
- ESDM Incubators being set-up by MeITy
- COEs in cutting edge electronic design have been set-up by MeITy
  - National Centre for Flexible Electronics (NCFlexE), IIT Kanpur
  - National Centre of excellence in technology for internal security – IIT Bombay

Human Capital
- Setting up of Electronics Sector Skill Council with NSDC & other Associations
- Financial Assistance to States/UTs for skill development in EDSM to train 90,000 candidates at total outlay of approx INR 114 crore
- Support for 3,000 additional PhDs in ESDM and IT sector at an estimated cost of INR 466 crore for a period of 9 yrs
- Scheme for “Skill Development in ESDM for Digital India” to facilitate skill development of 328,000 persons in ESDM at an outlay of approx INR 411 crore

Policy
- 100% FDI permitted under the automatic route
- National Policy on Electronics (NPE) 2019
  - Focus on emerging technologies such as 5G, IOT, AI, Robotics, Drone, etc.
  - Sovereign Patent Fund for development & acquisition of IP
  - Special package for export promotion, incentives for core component manufacturing ecosystem, high capital intensive projects
- Electronic Development Fund – corpus INR 6,950 crore for startup & innovation

Source: India Brand Equity Foundation, Make in India, NPE 2019, NPS 2019, MeITy, WEF
IT/ITeS Ecosystem: Overview of Present Scenario

Strong Ecosystem

Presence of firms such as Xenon Stack, Zini AI, Endoenergy Systems Private Limited in emerging technologies such as Big data, AI, Machine Learning, Exoskeleton, DevOps Consulting, Data Warehousing, XD Design Studio, Preventive & Assistive Technology for Healthcare

Top countries for IT/ITeS Exports

- USA
- Norway
- Canada
- Australia

Top IT/ITeS Companies

- Presence of 150+ registered IT units
- Approximately 35,000+ IT professionals in the region
- Higher cost savings of 9-14% over tier 1 cities
- Achieved more than twice the allotted target by bagging 2600 seats under the flagship GoI IBPO Scheme

STPI Exports amounting to INR 4,400 crore

PUNJAB: EMERGING IT/ITeS and ESDM HUB
IT/ITeS Ecosystem: Overview of Present Scenario

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- Norway
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- Australia

Top IT/ITeS Companies
Mohali - The Next Big IT Destination

**Greenfield City:** Rapidly Developing as IT Hub. Presence of Infosys, Teleperformance & Emerson among the top IT Companies

**World Class Amenities:** Residential Complexes and International Sports Facilities

**Strategic Location:** Presence of International Airport. Proximity to Delhi NCR

**Chandigarh Tricity:** Mohali along with Chandigarh & Panchkula form part of Tricity

**Knowledge Hub:** Universities & Research Institutions such as IISER, NIPER, ISB etc

**STPI, Mohali- Largest in India**
Mohali- The Upcoming Center of Growth

**STPI**
- Tier III standard world class Data Center with 160 rack capacity
- Biggest Incubation Centre with an area of 1.4 lakh sq. ft
- Plug & Play Facilities: State-of-the-art Network Operations Centre

**IT City**
- Project area of 1700 acres
- Approximately 45 companies present in various stages of operationalization
- Surrounded by existing Aerocity, World Trade Centre, leading Research & Academic Institutes

**QUARK City**
- Notified IT SEZ
- Approximately 10 lakh sq. ft of area
- Presence of over 70 IT/ITeS Companies
- Power from Quark City’s own 66KV substation
- Multi tenant facility with 24 X 7 operations

**BESTECH Towers**
- IT Park/ commercial complex
- Multi-Level Car Parking, Centralized Air- Conditioning & 100% Power Backup
- 3.5 lakh sq. ft. area available
- Options for Sale & Lease of bare shell & Plug N Play
Neuron: Centre of Excellence at STPI Mohali

Neuron is an initiative, to identify and evaluate promising startups in the field of AI/Data Analytics, IoT and Audio, Visual, Gaming (AVG) that will be hosted in the Startup Punjab Hub at STPI Mohali Incubator

1. Artificial Intelligence
2. Internet of Things
3. Data Analytics
4. Audio, Visual, Gaming

500 SEATER INCUBATOR
with an Investment of INR 20 crore at STPI Mohali.
250 Startups to be incubated in Cutting Edge Technologies

Founding Members
ESDM Sector in Punjab

India’s only large scale ASIC Fabrication Laboratory

Contributing to space and beyond through cutting edge R&D

Semiconductor Laboratory (SCL) supplied more than 100,000 units of Multiplexed Analog Signal Processor (MANAS) ASIC for use in high energy physics experiments (ALICE) at Large Hadron Collider, CERN - Geneva

SCL Developed two kinds of Low Drop Out (LDOs) Regulators for use in fabrication of equipment on-board spacecraft rocket Chandrayaan - 2

Major ESDM Companies in Punjab

Research Institutes
Snapshot of ESDM Ecosystem in the Region

- **Semi-Conductor Lab**
  - SCL is engaged in research and development of Microelectronics
  - The country’s only CMOS fabrication facility (Fab)
  - Designed over 150 ASIC/ Standard Blocks in last 5 years, meeting ISRO’s requirements

- **Defence**
  - Ordinance cable factory, established in collaboration with SUMITOMO Japan in 1963
  - Product portfolio includes Carrier Quad Table, Spring Steel Wires Air Field, Filled Cable Assemblies for T-72 & BMP-I

- **Testing & Development Centre**
  - ETDC, Mohali is a leading laboratory engaged in providing Accredited Calibration and Testing Facilities
  - Serves small and medium scale electronic industries

- **Scientific & Industrial Instruments**
  - CSIR is a premier national laboratory dedicated to R&D and design of scientific and industrial instruments
  - Offers R&D facilities in areas like agrionics, medical instrumentation, optics, cockpit bases instrumentation, transducers etc
Snapshot of ESDM Ecosystem in the Region

- **Research & Development**
  - C-DAC, Mohali is a premier R&D organization set-up in 1989 to train manpower in electronic design & technology
  - Product and services include high performance computing, grid and cloud computing, cyber security and forensics, software technologies, multilingual & heritage computing

- **Electronics**
  - BEL is a manufacturer of diversified product portfolio ranging from defence focused state-of-the-art equipment to civil products such as electronic voting machine, tablet PC, solar power traffic signal system and access control systems
  - Caters to domestic as well as 53 international customers across countries such as Japan, Germany, France, USA, UK and Vietnam

- **Telecom**
  - Punjab Communication Ltd is a Telecom and IT equipment manufacturer & solution provider
  - Product range covers voice/data, multiplexers, power line carriers, broadband equipment and services etc
  - It is a ISO 9001:2000 certified company with state of the art SMT manufacturing facility

- **Electronics**
  - CDIL is a renowned semiconductor manufacturer of silicon chips and devices since 1964 with state-of-the-art equipment
  - It has a sales and distribution network in over 35 countries
ADVANTAGE PUNJAB: THE NEXT GENERATION INVESTMENT DESTINATION
Punjab: Strategically Located & Well Connected

Proximity to National Capital

NEW DELHI
150 Miles
4 Hrs
55 Min

Connected to Freight Corridor for easy movement of goods

Connected to all major metro cities
Robust Connectivity

- 100% Road Connectivity
- All Major Towns Connected with 4/6 Lane Highways
- Road Density 2 times higher than National Average

- 2nd highest rail density in India

Direct Flights Available from Amritsar & Mohali
- Sharjah (4 hrs)
- London (9 hrs)
- Tashkent (2.5 hrs)
- Dubai (4 hrs)
- Birmingham (9 hrs)
- Doha (4.5 hrs)
- Kuala Lumpur (6 hrs)
- Singapore (6 hrs)
Ranked 2nd in Ease of Logistics in India

LAND & RAILWAY PORT
Amritsar

5 ICDs
- Amritsar
- Jalandhar
- Ludhiana
- Bathinda
- Derabassi

DEDICATED FREIGHT CORRIDORS
[Eastern & Western]
(Intersection Point – Dadri)

- Max Speed
  46 to 62 Miles/Hr

- Load Capacity Per Train
  5300 to 13000 tonnes

- Reduction in Freight Cost
  By 33%

MULTIMODAL LOGISTICS PARKS,
Ludhiana
- Adani Logistics Ltd.
- Hind Terminal Pvt. Ltd.
  (Sharaf Group, UAE)
- Punjab Logistics Infrastructure Ltd (PLIL)

Ranked Best in India on Safety & Security of Cargo Movement

Source: LEADS Index 2019, Government of India
Attractive Fiscal Incentives

IT/ITeS and ESDM sector has been identified as a thrust sector

**Capital Subsidy for IT/ITeS Units**
50% of Fixed Capital Investment (FCI) subject to a ceiling of INR 2.5 crore per unit

**Anchor Units**

- **Net GST reimbursement** for 15 years subject to 200% of FCI
- **100% exemption from CLU/EDC Charges**
- **Property Tax Exemption** up to 100% for 10 years
- **Employment generation subsidy @ INR 36,000/employee/year** for a period of 5 years; INR 48,000/employee/year for women and SC/ST/OBC employees
- **Stamp Duty exemption up to 100%**
- **Electricity Duty Exemption up to 100% for 10 years**

Anchor unit- minimum FCI of INR 50 crore or minimum direct employment of 500 people
Ease of Doing Business - Punjab Bureau of Investment Promotion

- **UNIFIED REGULATOR**
  - (23 Departments)
- **INVESTMENT PROMOTION AGENCY**
- **DEDICATED RELATIONSHIP OFFICER**
- **DIGITAL APPROVALS**

- **INVESTMENT PROMOTION**
- **FISCAL INCENTIVE APPROVALS**
- **REGULATORY CLEARANCES**
- **INVESTMENT FACILITATION**

---

**ONE STOP OFFICE**

**ADVANCED SINGLE WINDOW SYSTEM**

**ONE OF ITS KIND IN INDIA**

---

**LEVEL**

- **STATE**
- **DISTRICT**

**AUTHORITY**

- CEO, PBIP
- DC

**UNITS**

- LARGE
- MSME UNITS

### Attractive Fiscal Incentives

- **Electricity Duty Exemption** up to 100% for 10 years
- **Property Tax Exemption** up to 100% for 10 years
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- **Anchor unit- minimum FCI of INR 50 crore or minimum direct employment of 500 people**
Quality Power at Low Cost

**ABUNDANT**
- Power Surplus
- Installed Capacity 13,432 MW

**LOW COST**
- Power @ INR 5.00 per unit

**QUALITY**
- T&D Losses 14.11%
  - National Average 22%

No shortage even during peak demand

Month-wise power supply 2017-18
(in terms of peak demand and availability)

Peaceful & Competitive Workforce

**PEACEFUL**
- No Lockouts
- No Strikes
- Flexibility In Hiring

**FRIENDLY**
- State Ranks 3rd on Interstate Migrant Policy Index 2019

**REFORMS**
- 24x7 Shifts Allowed Across Genders

No disruptions in working environment
Skilled Human Capital

6000+ graduates in IT and allied fields
8000+ students trained in ESDM / IT

<table>
<thead>
<tr>
<th>Institutes</th>
<th>Number</th>
<th>Total Annual Graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering</td>
<td>89</td>
<td>45,013</td>
</tr>
<tr>
<td>Polytechnics</td>
<td>204</td>
<td>66,495</td>
</tr>
<tr>
<td>ITIs</td>
<td>344</td>
<td>70,000</td>
</tr>
</tbody>
</table>

Courses offered

Artificial Intelligence | Machine Learning | Cloud Computing | Internet of Things | Robotic Process Automation

Some Leading Institutions

- Indian School of Business Mohali
- IIM, Amritsar
- IIT, Ropar
- Thapar Institute of Engineering & Technology
- PEC, Chandigarh
- PTU, Jalandhar
- B.R Ambedkar NIT, Jalandhar
- Guru Nanak Dev University
- LPU, Jalandhar
- Chitkara University
- IISER, Mohali
Ensuring Quality of Life

Modern Health Infrastructure
- Ranks 2nd on National Health Index
- Home to leading health institutions such as PGI, Fortis, Max, Apollo

Peaceful Environment
- Abundant green spaces around settlements
- Higher air quality than Delhi NCR

Leisure Spaces

Hotels

Hospitals

Schools

Night Life

Weekend Getaways

Shimla - 130 km
Chail - 106 km
Kasauli - 54 km
Parwanoo - 30 km

*Source: As per NCRB 2017
Safest Place to do Business

Rate of Cognizable Crimes (2017)

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haryana</td>
<td>802.9</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>602.6</td>
</tr>
<tr>
<td>Gujarat</td>
<td>525</td>
</tr>
<tr>
<td>Madhya Pradesh</td>
<td>478.6</td>
</tr>
<tr>
<td>Maharashtra</td>
<td>383.4</td>
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<tr>
<td>Telangana</td>
<td>358.7</td>
</tr>
<tr>
<td>Chhattisgarh</td>
<td>344.3</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>330.7</td>
</tr>
<tr>
<td>Karnataka</td>
<td>291.7</td>
</tr>
<tr>
<td>Andhra Pradesh</td>
<td>283.9</td>
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<tr>
<td>Uttar Pradesh</td>
<td>269.6</td>
</tr>
<tr>
<td>Odisha</td>
<td>242</td>
</tr>
<tr>
<td>Punjab</td>
<td>239.9</td>
</tr>
</tbody>
</table>

Percentage Share of State for Cognizable Crime in India

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uttar Pradesh</td>
<td>12</td>
</tr>
<tr>
<td>Maharashtra</td>
<td>9.3</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>8.4</td>
</tr>
<tr>
<td>Madhya Pradesh</td>
<td>7.6</td>
</tr>
<tr>
<td>Gujarat</td>
<td>6.7</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>4.9</td>
</tr>
<tr>
<td>Bihar</td>
<td>4.7</td>
</tr>
<tr>
<td>Haryana</td>
<td>4.5</td>
</tr>
<tr>
<td>West Bengal</td>
<td>3.9</td>
</tr>
<tr>
<td>Karnataka</td>
<td>3.7</td>
</tr>
<tr>
<td>Andhra Pradesh</td>
<td>3.2</td>
</tr>
<tr>
<td>Telangana</td>
<td>2.7</td>
</tr>
<tr>
<td>Odisha</td>
<td>2.1</td>
</tr>
<tr>
<td>Chhattisgarh</td>
<td>1.8</td>
</tr>
<tr>
<td>Punjab</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Recorded Lowest Share of Cognizable Crime amongst major industrialized states of India

*Source: As per NCRB 2017*
INVESTMENT OPPORTUNITIES
Mohali has a great ecosystem for the development of IT/ITeS services. Infosys has been operating in this region for many years and Invest Punjab has been extremely proactive and cooperative to facilitate the setting up of the Infosys campus at IT City, Mohali. The city has highly skilled manpower and is emerging as a big IT destination in India, comparable to leading global cities.

Komal Talwar
Co-Founder and Managing Director

The Government of Punjab has taken multiple steps to ensure efficiency of its processes and to remove hurdles faced by investors. Punjab Bureau of Investment Promotion which acts as a single point of contact for investors, facilitates all essential regulatory approvals required by investors by granting timely approvals.

STPI Amritsar: Expanding Horizon of ITeS Sector to Other Cities

- Facilities in STPI Amritsar Centre (to be operationalized by next fiscal year)
  - Being developed on 3 acre land with an estimated cost of INR 20 crore
  - State-of-the-art Network Operation Centre
  - State-of-the-art Plug N Play Incubation Facility
  - Raw Space for Incubation Facility
  - Finishing School

- Will provide services to Small and Medium Enterprises & spread IT/ITeS and BPO industry

Advantage Amritsar

<table>
<thead>
<tr>
<th>Hub of Diversified Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robust Connectivity</td>
</tr>
<tr>
<td>Presence of Enormous Talent Pool</td>
</tr>
<tr>
<td>Lower cost of operations</td>
</tr>
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The Government of Punjab has taken multiple steps to ensure efficiency of its processes and to remove hurdles faced by investors. Punjab Bureau of Investment Promotion which acts as a single point of contact for investors, facilitates all essential regulatory approvals required by investors by granting timely approvals.

Mohali has developed as a prominent city for software development and exports in the northern region. The city is open to expansion of major players in the IT/ITeS sector with ready availability of IT professionals.
Mr. Kamaljit Singh  
Senior Vice President  

Punjab has abundant skilled IT/ITeS manpower which fosters the current ecosystem. The state government has proactively put IT/ITeS as a thrust area thereby providing attractive incentives.

Sanjay Raitani  
Operations  

With support from Invest Punjab and Dept. of IT, Govt. of Punjab, Teleperformance successfully bid 1,600 seats in Mohali, in the IBPO Scheme. The quality of life and infrastructure in Mohali and its close proximity to International Airport were the key drivers for setting up our BPO operations in this city. Invest Punjab office and state authorities have been extremely cooperative in facilitating setting up of our newest campus in one of the prominent state-of-the-art buildings in Mohali.
Major IT/ITES & ESDM Players in Punjab

TechTier  
Infosys®  
Jio

smartData ENTERPRISES  
airtel  
SPAN

edifecs  
Quark  
DRISH INFOTECH

eiMPACT  
PunCom  
Teleperformance

Megrisoft  
bebo  
 netsmartz

EMERSON  
XEAM  
OutlineSystems, Inc.

FIS  
MERITECH  
WINSHUTTLE

Gilard  
HELLA®  
Godrej & Boyce