

# Gujarat

NOVEMBER  
2011

THE GROWTH ENGINE OF INDIA



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- ❖ Infrastructure Status
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## Gujarat Factfile



Source: Maps of India

→ Gujarat is located on the Western coast of India and has the longest coastline of 1,600 km in the country. The state shares its border with Rajasthan, Madhya Pradesh, Maharashtra and the Union Territories of Daman & Diu and Dadra & Nagar Haveli. The Arabian Sea borders the state both to the West and the South-West.

- Ahmedabad, Vadodara, Surat, Rajkot, Bhavnagar and Jamnagar are some of the key cities of the state.
- There are eight agro climatic zones in the state that support cultivation of a wide range of crops.
- The most commonly spoken language of the state is Gujarati. Hindi and English are the other Indian languages used.

| Parameters                              | Gujarat     |
|---|-------------|
| Capital                                 | Gandhinagar |
| Geographical area (sq km)               | 196,024     |
| Administrative districts (No)           | 26          |
| Population density (persons per sq km)* | 308         |
| Total population (million)*             | 60.3        |
| Male population (million)*              | 31.4        |
| Female population (million)*            | 28.9        |
| Sex ratio (females per 1,000 males)*    | 918         |
| Literacy rate (%)*                      | 79.3        |

Sources: Government of Gujarat Website,  
www.gujaratindia.com,

\*Provisional Data – Census 2011

## Gujarat in Figures ... (1/2)

| Parameter                                | Gujarat    | All-States  | Source   |
|--|------------|-------------|--|
| <b>Economy</b>                           |            |             |  |
| GSDP as a percentage of all states' GSDP | 7.4        | 100         | CMIE, as of 2009-10, current prices                                      |
| Average GSDP growth rate (%)*            | 16.1       | 15.5        | CMIE, 2004-05 to 2009-10, current prices                                 |
| Per capita GSDP (US\$)                   | 1,563.8    | 1,302.4     | CMIE, as of 2009-10, current prices                                      |
| <b>Physical Infrastructure</b>           |            |             |  |
| Installed power capacity (MW)            | 15,722.6   | 173,626.4   | Central Electricity Authority, as of March 2011                          |
| GSM cellular subscribers (No)            | 37,534,211 | 618,284,322 | Cellular Operators Association of India, as of September 2011            |
| Broadband subscribers (No)               | 656,041    | 10,737,850  | Ministry of Communications & Information Technology, as of November 2010 |
| National Highways (km)                   | 3,245      | 70,934      | Ministry of Road Transport & Highways, Annual Report 2010-11             |
| Major and minor ports (No)               | 1 + 41     | 12 + 187    | Indian Ports Association   |
| Airports (No)                            | 14         | 133         | Airport Authority of India   |

\* Calculated in Indian Rupee Terms

## Gujarat in Figures ... (2/2)

| Parameter                              | Gujarat | All-States | Source   |
|--|---------|------------|--|
| <b>Social Indicators</b>               |         |            |  |
| Literacy rate (%)                      | 79.3    | 74.0       | Provisional Data – Census 2011   |
| Birth rate (per 1,000 population)      | 22.3    | 22.5       | SRS Bulletin, 2009   |
| <b>Investments</b>                     |         |            |  |
| FDI equity inflows (US\$ billion)      | 7.2     | 132.9      | Department of Industrial Policy & Promotion,<br>April 2000 to April 2011 |
| Outstanding investments (US\$ billion) | 991.3   | 7,449.3    | CMIE (2009-10)   |
| <b>Industrial Infrastructure</b>       |         |            |  |
| PPP projects (No)                      | 66      | 808        | www.pppindiaatabase.com  |
| SEZs (No)                              | 30      | 380        | Notified as of October 2011,<br>www.sezindia.nic.in                      |

PPP: Public Private Partnership, SEZ: Special Economic Zone, SRS: Sample Registration System

## Advantage Gujarat ... (1/2)

### Facilitating Infrastructure

Gujarat has excellent infrastructure as compared to the other states. There are 42 ports, 13 domestic airports and one international airport. The state also has extensive road and rail network. The urban and rural areas have 24-hour power supply. A 2,200 km gas-grid supplies gas to the industrial areas. There are 83 product clusters, 257 industrial estates, 30 notified Special Economic Zones (SEZ) and upcoming infrastructure on the Delhi-Mumbai Industrial Corridor (DMIC). Almost one-third of the DMIC project is taking place in Gujarat alone. A Dedicated Freight Corridor (DFC) is being set up between Mumbai and Delhi. Of the 20 industrial nodes identified across six states where DFC passes, six have been proposed for Gujarat alone.

### Industrially Developed State

Gujarat is the 'Petro Capital' of India, the state contributes significantly to the country's petrochemicals production (62 per cent), chemicals production (51 per cent) and pharmaceuticals production (35 per cent). It has achieved the distinction of being one of the most industrially developed states. Accounting for 5 per cent of the total Indian population, Gujarat contributes 21 per cent to India's exports and 13 per cent to its industrial production.

### Availability of Skilled Manpower

Gujarat has good educational infrastructure with premier institutes in management, fashion, design, infrastructure planning and pharmaceuticals. Also, there are industrial training institutes in each district for training manpower for shop floor level. The State Government has many initiatives to encourage innovation in the education sector.

## Advantage Gujarat ... (2/2)

### Policy Support

Gujarat is the only state in India where the State Government has framed policies in almost all key sectors such as industry, power, ports, road, IT, agriculture, minerals and tourism. Gujarat's Industrial Policy, 2009, offers attractive incentives and concessions for prospective investors.

### Growing Economy and Industry

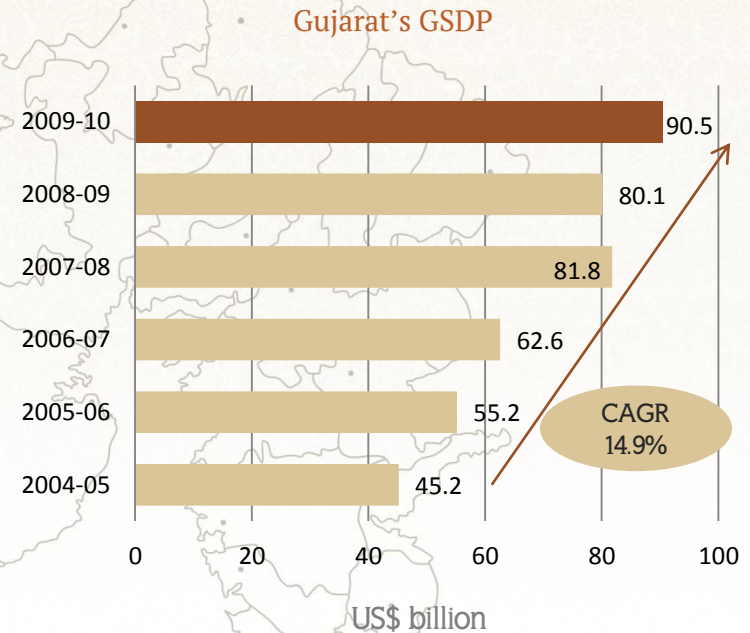
The average annual GSDP (Gross State Domestic Product) growth rate from 2004-05 to 2009-10, was about 14.9 per cent. A robust financial growth and presence of diverse industry sectors with leading national and international companies makes it one of the most attractive investment destinations in the country.

### Abundant Natural Resources

Gujarat is a mineral rich state both in terms of capacity reserves and production, as it has large natural reserves of oil and gas and produces the highest amount of crude oil. It also has reserves of bauxite, limestone and clay deposits in India.

## Economic Snapshot – GSDP

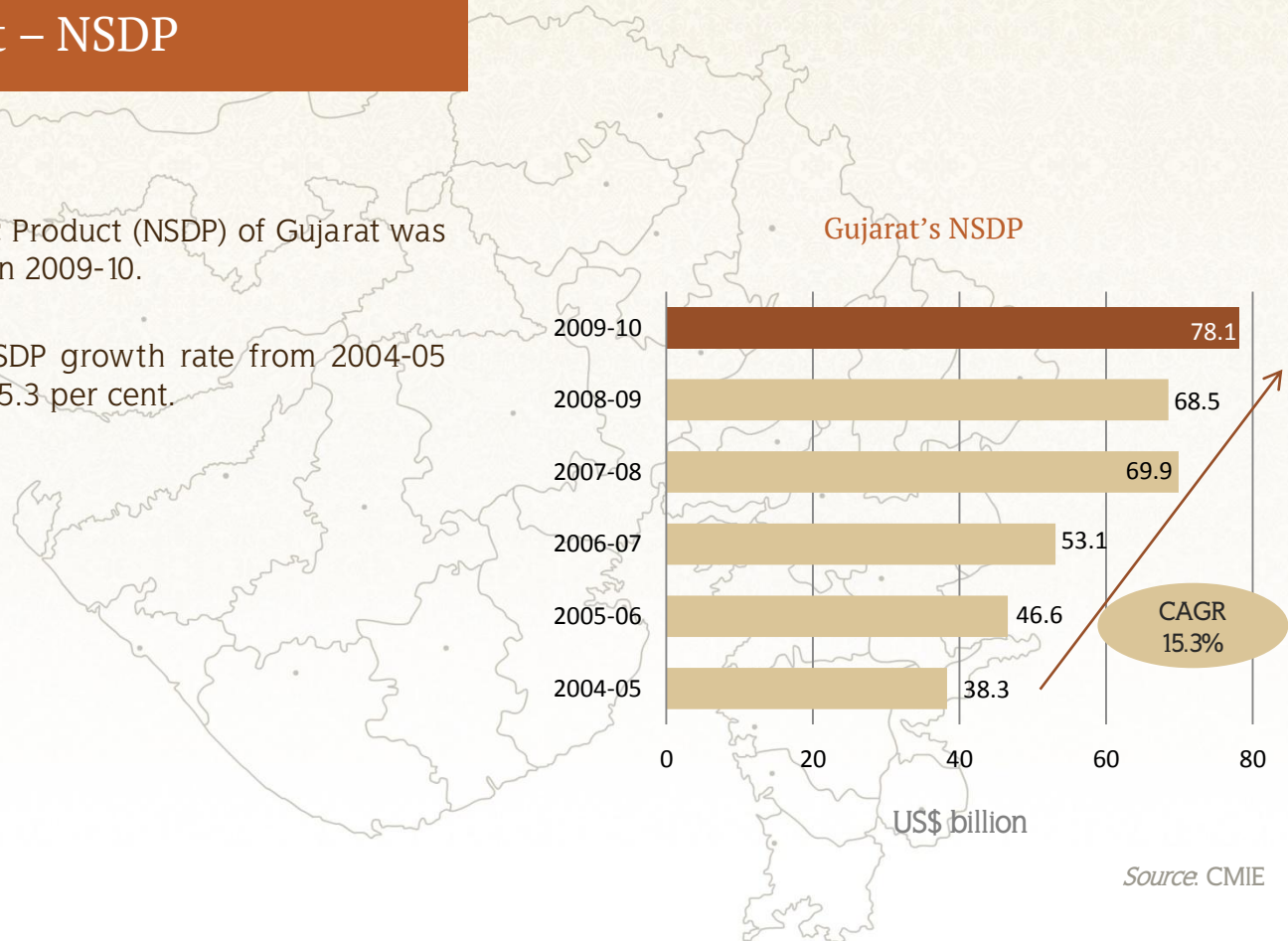
- At current prices, the Gross State Domestic Product (GSDP) of Gujarat was about US\$ 90.5 billion in 2009-10.
- The average annual GSDP growth rate from 2004-05 to 2009-10, was about 14.9 per cent.



Source: CMIE

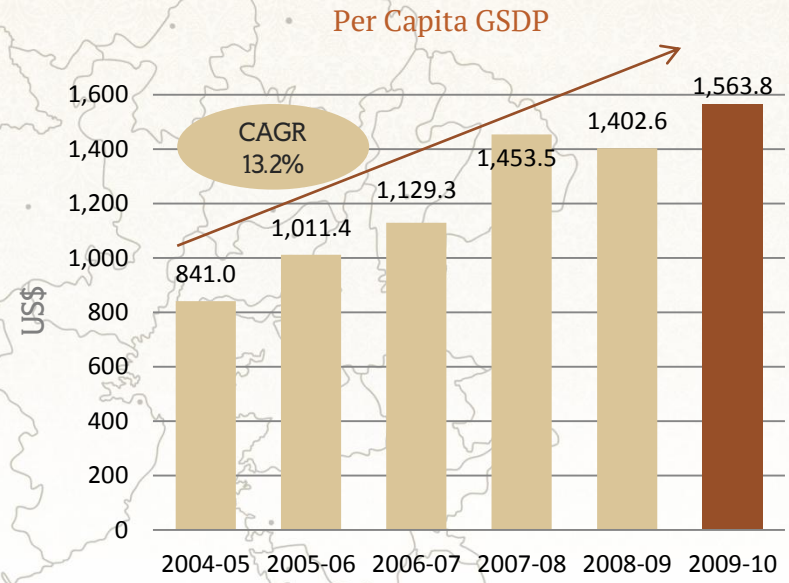
## Economic Snapshot – NSDP

- The Net State Domestic Product (NSDP) of Gujarat was about US\$ 78.1 billion in 2009-10.
- The average annual NSDP growth rate from 2004-05 to 2009-10 was about 15.3 per cent.



## Economic Snapshot – Per Capita GSDP

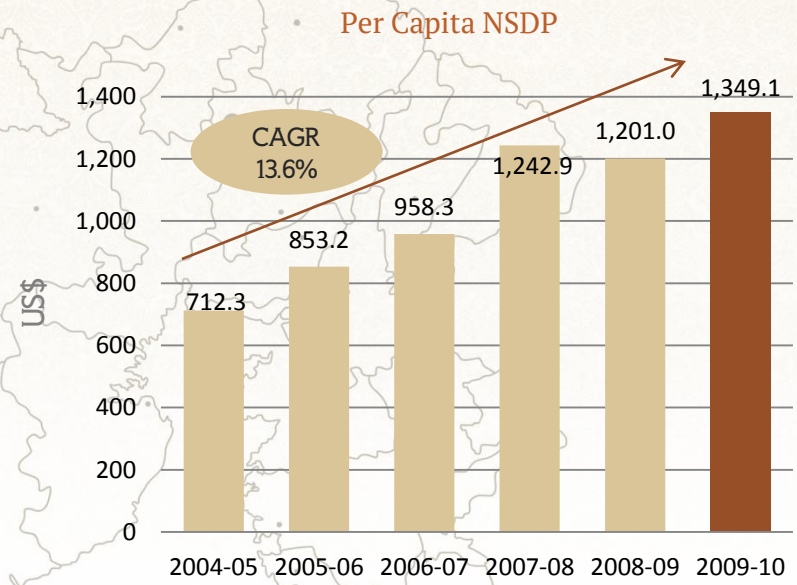
- The state's per capita GSDP in 2009-10 was US\$ 1,563.8 as compared to US\$ 841 in 2004-05.
- The per capita GSDP increased at a CAGR (Compound Annual Growth Rate) of 13.2 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – Per Capita NSDP

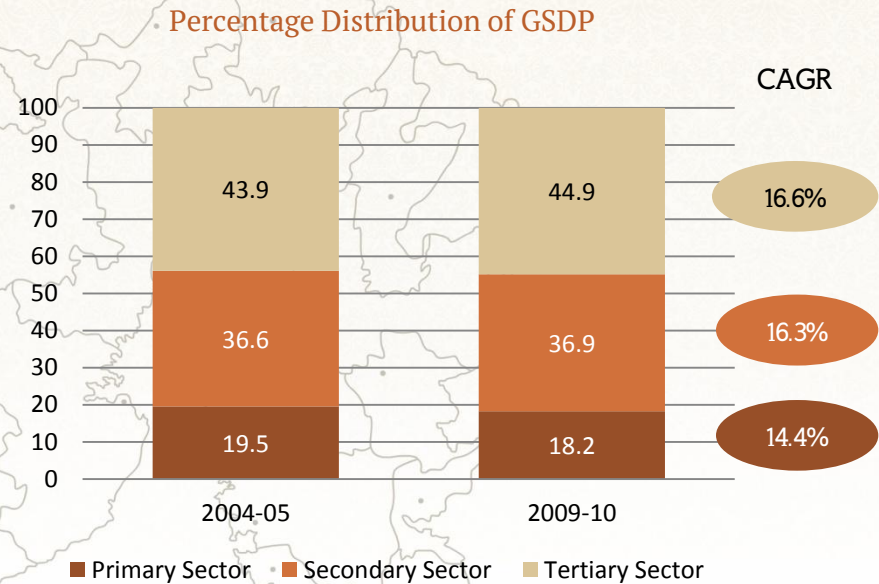
- The state's per capita NSDP in 2009-10 was US\$ 1,349.1 as compared to US\$ 712.3 in 2004-05.
- The per capita NSDP increased at an average rate of 13.6 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – Percentage Distribution of GSDP

- In 2009-10, the tertiary sector contributed 44.9 per cent to the state's GSDP at current prices, followed by secondary sector (36.9 per cent) and primary sector (18.2 per cent).
- At a CAGR of 16.6 per cent, the tertiary sector has been the fastest growing among the three sectors from 2004-05 to 2009-10. The growth has been driven by trade, hotels, real estate, finance, insurance, transport, communications and other services.
- The secondary sector grew at a CAGR of 16.3 per cent between 2004-05 and 2009-10. It was driven by manufacturing, construction and electricity, gas and water supply.
- The primary sector grew at a CAGR of 14.4 per cent between 2004-05 and 2009-10.

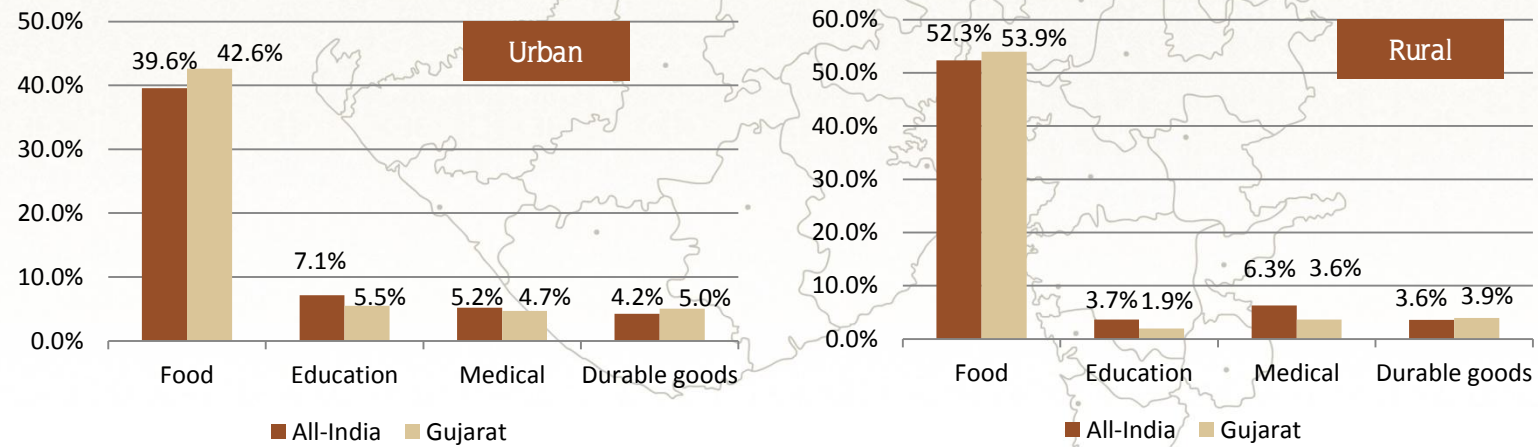


Source: CMIE

## Economic Snapshot – Consumer Expenditure on Household Goods and Services

→ Gujarat is ahead as compared to all-India in share of per capita expenditure on food and durable goods.

Share of Average Monthly Per Capita Expenditure on Household Goods and Other Services



Source: Household Consumer Expenditure in India, 2007-08 NSS 64th Round

## Economic Snapshot – Agricultural Production

- Gujarat has a robust agricultural economy; the total crop area covers more than 50 per cent of the state's total land area.
- In 2009-10, the total food grain production in the state was around 5.6 million tonnes and the total oilseeds production in the state was around 3 million tonnes.
- Sugarcane is the major crop in the state followed by cotton, wheat, groundnuts and potato. The total sugarcane production in the state was around 15.5 million tonnes in 2008-09.
- The other major crops grown in the state include tobacco, coconuts, rice, onion, jowar (sorghum), bajra (millets), oilseeds, maize, tur and gram.
- In 2009-10, banana production in the state was around 3.7 million tonnes.

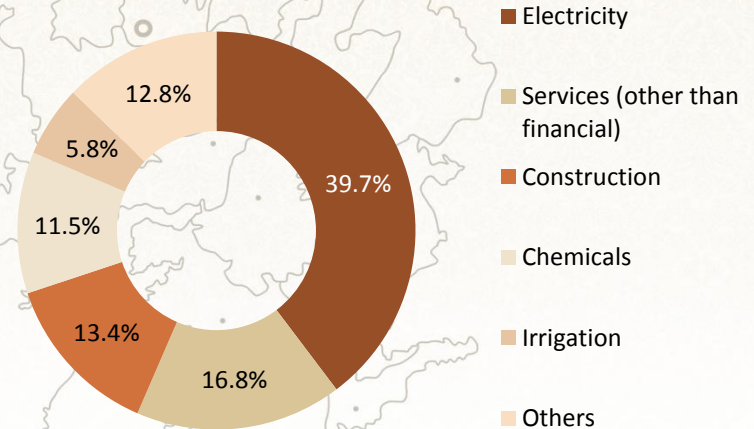
| Crop                 | Annual Production as of 2009-10 ('000 metric tonnes) |
|----------------------|--|
| Sugarcane*           | 15,510   |
| Cotton               | 7,401^   |
| Wheat                | 2,351  |
| Groundnut            | 1,757  |
| Potato               | 1,657  |
| Rice                 | 1,293  |
| Onion                | 1,078.6  |
| Bajra (millet)       | 828  |
| Castor seed          | 650  |
| Maize                | 397  |
| Rapeseed and Mustard | 320  |
| Coconut              | 108  |
| Tobacco              | 102  |

Sources: Socio-Economic Review of Gujarat, 2010-11, Indian Horticulture Database – 2010, National Horticulture Board, Indian Oilseeds and Produce Export Promotion Council, Department of Agriculture and Cooperation, Government of India  
^'000 Bales (170 kgs each)  
\*As of 2008-09

## Economic Snapshot – FDI Inflows & Investments

- According to the Department of Industrial Policy & Promotion, the cumulative FDI inflows from April 2000 to April 2011 amounted to US\$ 7.2 billion.
- In 2009-10, outstanding investments in the state were US\$ 991.3 billion.
- Of the total outstanding investments, the electricity sector accounted for around 39.7 per cent followed by services (other than financial) sector at 16.8 per cent.

Break up of Outstanding Investments by Sector (2009-10)



Others include Food & beverages, Textiles, Non-metallic mineral products, metals & metal products, Machinery and Mining

Source: CMIE

## Economic Snapshot – Export Trends

- Gujarat contributes 22 per cent to India's total exports of merchandised goods and services.
- Exports include products from sectors such as textiles, petroleum, chemicals, pharmaceuticals, engineering, gems and jewellery.
- Export products from intermediate and minor ports include naphtha, petrol, clinker, cement, oil cakes, bauxite, paraxylene, salt, soda ash, food grains; cement clinker, ethylene, Pet-cock etc.
- The total cargo handled by the Kandla Port has increased from 72.2 million tonnes in the year 2008-09 to 79.5 million tonnes in the year 2009-10, showing an increase of 10.1 per cent over the previous year (including transshipment).

*Sources:* Industries Commissionerate, Gujarat Government, "Socio-Economic Review of Gujarat 2010-11", Directorate of Economics & Statistics

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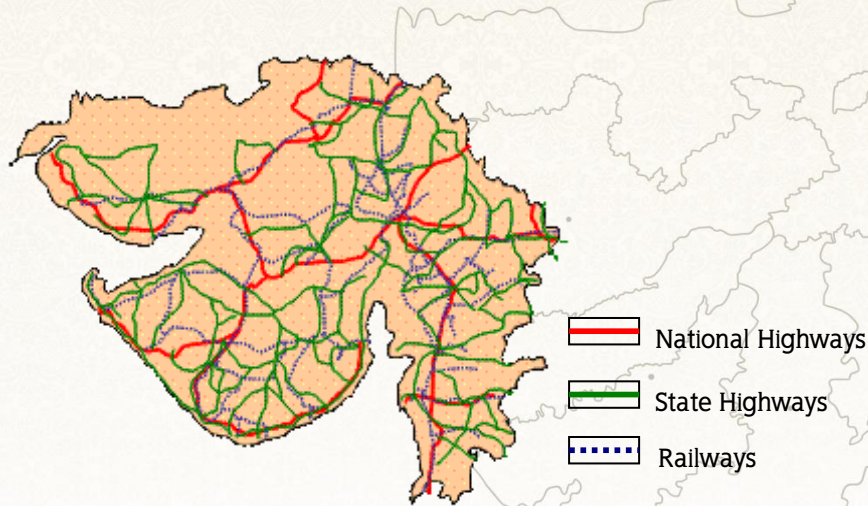
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## Physical Infrastructure – Roads



Source: Gujarat State Road Development Corporation

- As of March 2008, the state has around 18,447 km of State Highways, 20,564 km of Major district roads, 10,352 km of Other district roads and 21,505 km of Village roads.
- 96.49 per cent of the total roads in the state are surfaced as of March 2008.

- Government of Gujarat through Gujarat Infrastructure Development Board (GIDB) has prepared a vision document, Blueprint for Infrastructure in Gujarat (BIG) – 2020. It has identified a shelf of projects and investments required across road sector to be implemented on priority basis for the inclusive growth of the state.
- 'Pragatipath Yojana', a State Government initiative introduced in 2005, envisages the development of nine high-speed corridors and widening of highways to connect the tribal, coastal, industrial and rural areas with mainstream areas.

| Road Type            | Road Length (km) |
|----------------------|------------------|
| National Highways    | 3,245            |
| State Highways       | 18,447           |
| Major District Roads | 20,564           |
| Other District Roads | 10,352           |
| Village Roads        | 21,505           |

Sources: Ministry of Road Transport & Highways, Annual Report - 2010-11, Socio-Economic Review of Gujarat, 2010-11

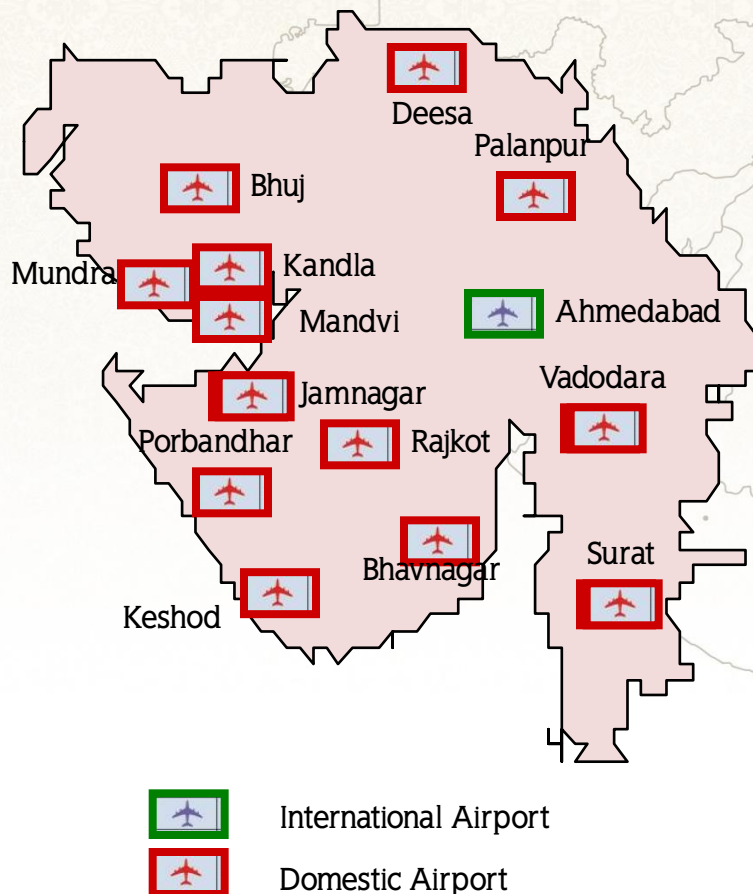
## Physical Infrastructure – Railways



Source: Maps of India

- The rail traffic in Gujarat mainly falls under the following divisions of Western Railway, namely: Vadodara, Rajkot, Bhavnagar, Mumbai and Ahmedabad.
- The state has a railway network of 5,328 km as of March 2009. It comprises 3,193 km of broad gauge, 1,364 km of metre gauge and 771 km of narrow gauge.
- Ahmedabad, Anand, Bhavnagar, Bhuj, Godhra, Porbandar, Rajkot, Vadodara (Baroda) and Valsad are some of the important railway stations in the state.

## Physical Infrastructure – Airports

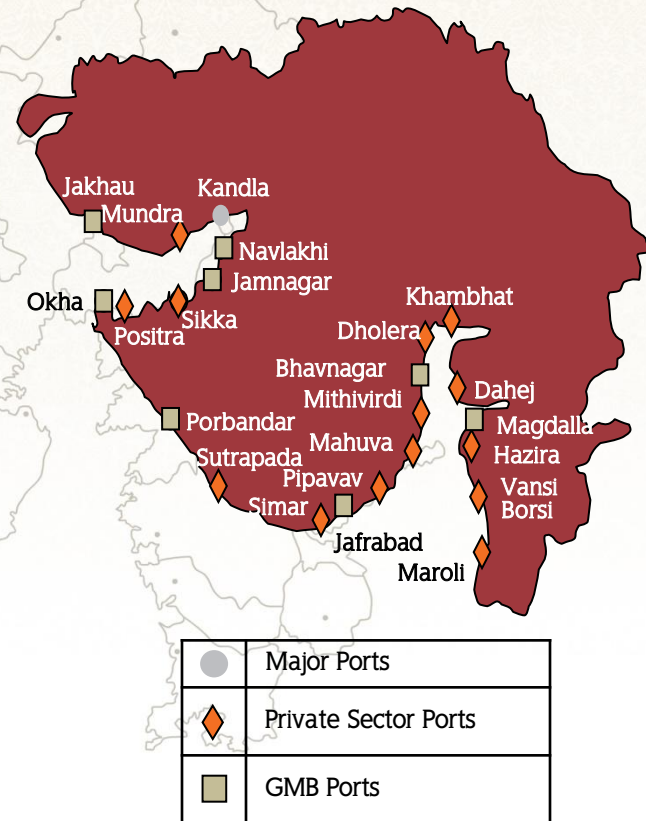


- The state has 13 domestic airports (the highest in any state) and one international airport at Ahmedabad.
- The Sardar Vallabhai Patel International Airport in Ahmedabad is India's eighth-busiest airport with an average of 150 aircraft movements a day. The airport is under renovation and once work is complete, the number of parking bays will increase from 15 to 45 and both the international and domestic terminals will have four aero-bridges each.
- In addition, there are domestic airports at Bhavnagar, Bhuj, Jamnagar, Kandla, Keshod, Deesa, Porbandar, Rajkot, Surat, Vadodara, Mundra, Mandvi and Palanpur.
- A feasibility study for an international airport at Fedra in Dholera (about 130 km away from Ahmedabad) has been completed in January 2010. Once ready, the airport could be useful for both passenger and cargo purposes.

## Physical Infrastructure – Ports ... (1/3)

- The state has one of the strongest port infrastructures in India. It is the first state in India to take up port privatisation.
- Gujarat has 42 ports along a 1,600 km coastline, including one major port at Kandla and 41 minor ports.
- The state has five direct berthing commercial ports, seven direct berthing captive port terminals and four lighterage-cargo ports.
- It handled the largest (79.47 per cent) share of cargo traffic in India's minor and intermediate ports, and 14.17 per cent in India's major ports in 2009-10.
- The state has two LNG terminals that offer transportation facilities for natural gas, crude oil and petroleum products from the Middle East and Europe.

Port Infrastructure in Gujarat



Source: "Ports of Gujarat" – Sector Profile 2008-09, Gujarat Maritime Board (GMB)

## Physical Infrastructure – Ports ... (2/3)

- The state has a vast hinterland comprising key Western, Northern and central Indian states.
- It also has a large external trade potential given its vast coastline.
- The intermediate and minor ports of Gujarat handled a total cargo of 205.5 million tonnes during 2009-10 showing an increase of about 34.5 per cent compared to the previous year.
- The total cargo handled by the Kandla Port has increased to 79.5 million tonnes during 2009-10 reflecting an increase of 10.1 per cent over the previous year.

*Source: Socio-Economic Review of Gujarat, 2010-11*



## Physical Infrastructure – Ports ... (3/3)

- Many upcoming ports are being developed as captive ports to cater to specific company and industry requirements.
- The state undertakes fast-track clearance in establishment of ports through private participation.
- There is an increase in connectivity to non-major ports owing to the development of the Delhi-Mumbai Dedicated Freight Corridor.
- More than 4,800 ships and 1,000 sailing vessels visit the ports of Gujarat every year.

*Source: "Ports of Gujarat", Sector Profile 2008-09, Gujarat Government*

### Key Private Sector Stakeholders in Gujarat's Ports Sector

Gujarat Adani Port Limited

Peninsular & Oriental Steam Navigation Company

Gujarat Pipavav Port Limited

Reliance Industries Limited

Maersk

Welspun

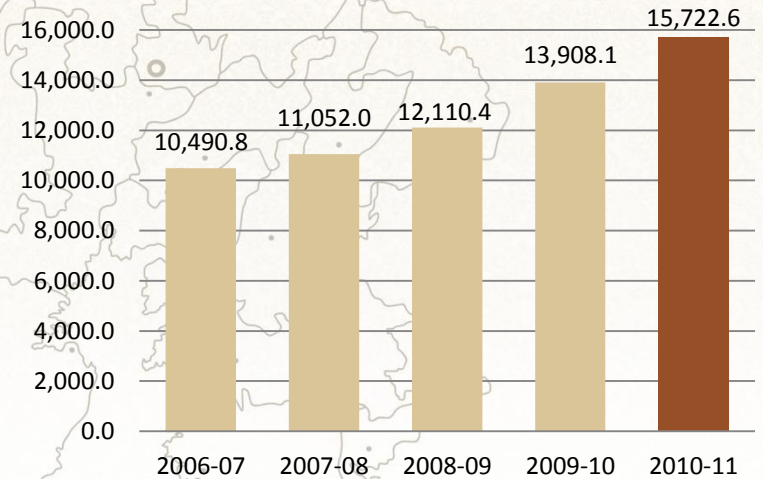
Petronet LNG

Shell

## Physical Infrastructure – Power and Gas ... (1/2)

- As of March 2011, Gujarat had a total installed power generation capacity of 15,722.65 MW, which comprised 7,178.27 MW under private utilities, 5,931.90 MW under state utilities and 2,612.48 under central utilities.
- Of the total installed power generation capacity, 12,390.86 MW was contributed by thermal power, 772 MW was contributed by hydro power, 559.32 MW was contributed by nuclear power and renewable power contributed 2,000.47 MW of capacity.
- 100 per cent of Gujarat's villages have electricity connection for 24-hour power through the "Jyotigram Yojana".
- Gujarat State Petroleum Corporation's (GSPC) gas company supplies Piped Natural Gas (PNG) to more than 225,000 domestic households, 810 commercial & non-commercial establishments and 1,018 industrial customers.

Installed Power Capacity (MW)

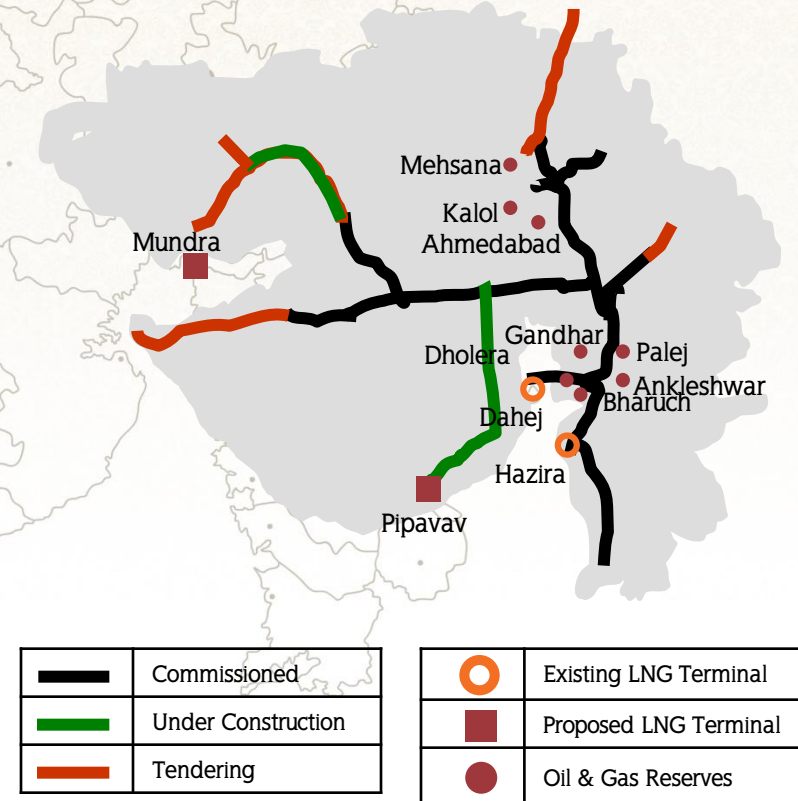


Source: Central Electricity Authority

## Physical Infrastructure – Power and Gas ... (2/2)

- GSPC has holdings in over 64 oil and gas fields, 53 of these blocks are located in India and 11 are located in Australia, Egypt, Indonesia and Yemen.
- GSPC is known for its discovery of the largest gas reserve in India at the Krishna-Godavari Basin.
- Gujarat has a 2,200 km integrated gas-grid that is operated on an open access, common carrier principle.

### Integrated Gas Grid for Energy Security



| Integrated Gas-Grid  |            |
|----------------------|------------|
| Current Transmission | 25 mmscmd* |
| Total Length         | 2,200 km   |
| Completed            | 1,420 km   |
| Under Construction   | 450 km     |
| Planned Expansion    | 330 km     |

Source: "Beyond State Boundaries", Government of Gujarat 2008-09,  
MMSCMD: Million Metric Standard Cubic Metre Per Day,  
LNG: Liquefied Natural Gas  
\*includes 10 mmscmd of re-gassified LNG

## Physical Infrastructure – Telecom and IT ... (1/2)

- As of September 2011, the state had 37.5 million GSM cellular subscribers.
- As of November 2010, the state had 656,041 broadband subscribers.
- According to the Department of Telecommunications, Government of India, Gujarat had 43.3 million wireless connections and 1.9 million wire-line subscribers with tele-density of 76.12 per cent, as of December 2010.
- All district headquarters are provided with back-up support of transportable V-SAT terminals.
- The state also has the State Disaster Resource Network (SDRN), a database of disaster management related inventory.
- The Bhaskaracharya Institute for Space Applications and Geo-informatics (BISAG) has satellite communication facilities with a dedicated bandwidth.

| Telecom Infrastructure (December 2010) |             |
|--|-------------|
| GSM Cellular Subscribers               | 37,534,211* |
| Broadband Subscribers                  | 656,041^    |
| Wireless Connections                   | 43,325,984  |
| Wire-line Connections                  | 1,971,551   |
| Post Offices                           | 8,976**     |
| Telephone Exchanges                    | 3,113       |

Sources: Cellular Operators Association of India, Department of Telecommunications, Annual Report 2010-11, Socio-Economic Review of Gujarat, 2010-11

\*As of September 2011

^As of November 2010

\*\*As of March 2010

## Physical Infrastructure – Telecom and IT ... (2/2)

- Gujarat State Wide Area Network (GSWAN), is one of the largest IP-based WAN connecting over 2,800 government offices.
- The state has the Sachivalaya Integrated Communication Network (SICN) with over 7,400 voice connections.
- There is facility for online redressing of citizen's grievances through the State Wide Attention on Grievances with Application of Technology (SWAGAT).
- Integrated Workflow and Document Management System (IWDMS) streamlines documentation in government offices.

### Some of the Major Telecom Operators in Gujarat

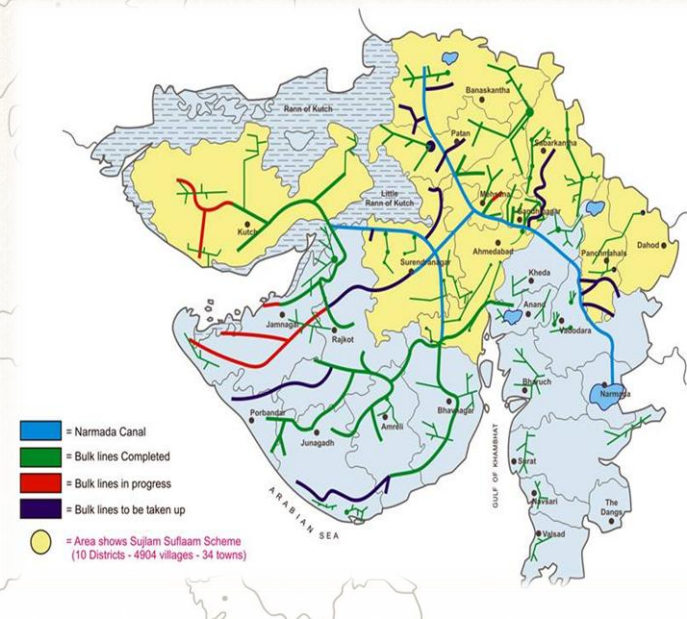
Vodafone Essar  
IDEA Cellular  
Bharti Airtel  
Bharat Sanchar Nigam Limited (BSNL)  
Reliance Communications  
Aircel Limited  
Etisalat DB Telecom

Source: Cellular Operators Association of India

## Development Projects: Urban Infrastructure – Water

- As of 2010, 1,909 km bulk pipelines and about 106,000 km of distribution pipelines have been laid across the state.
- The state has an extensive water grid network. State-wide water grid covers 75 per cent of the population with sustainable surface water resources for drinking water.
- Water conservation schemes include:
  - 133,732 check dams
  - 122,035 *bori bandhs* (dams made of sand bags)
  - Interlinking of 21 rivers in central and North Gujarat through 'Sujalam Sufalam Yojana'.
  - 19,154 deepened ponds.
- The Gujarat Water Users' Participatory Irrigation Management Bill, 2007, authorises farmers to constitute Water Users' Associations (WUA) for the management of canals handed over, after rehabilitation by the government.

State-wide Water Grid



Fresh-Water Availability in Gujarat

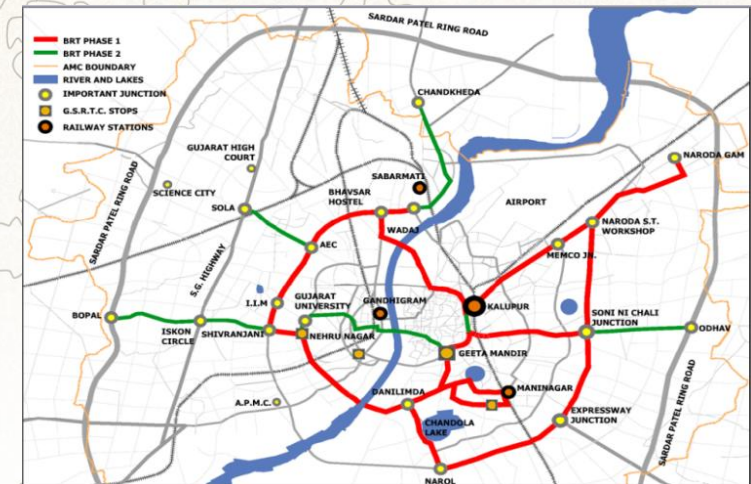
|               |                   |
|---------------|-------------------|
| Surface Water | 38,100 mcm        |
| Ground Water  | 12,000 mcm        |
| <b>Total</b>  | <b>50,100 mcm</b> |

Source: "Beyond State Boundaries", Government of Gujarat, 2008-09  
MCM: Million Cubic Metres

## Development Projects: Clean Transport Initiative through CNG and BRTS

- The state envisages replacement of conventional fuels by Compressed Natural Gas (CNG) in all buses and auto rickshaws.
- The Bus Rapid Transport System (BRTS) is being implemented in Ahmedabad jointly by the State Government, Gujarat Infrastructure Development Board (GIDB), Ahmedabad Municipal Corporation (AMC) and Ahmedabad Urban Development Authority (AUDA).
- Approved length: 88.5 km (Phase-I: 58 km + Phase-II: 30.5 km). Phase-I is already in operation. The entire project is to be completed by 2011.

Ahmedabad BRTS Map



## Development Projects: Other Initiatives in Urban Infrastructure

### River-Front Development

Development around the rivers Sabarmati and Tapi have been undertaken to revitalise the city and improve existing infrastructure.

It also envisages development of commercial, residential and recreational facilities on the river-front.

The Sabarmati River Front Development Corporation honoured with the Prime Minister's Award for Excellence in Urban Planning and Design.

### JNNURM

Under the Jawaharlal Nehru National Urban Renewal Mission (JNNURM), 70 projects costing US\$ 1.2 billion have been sanctioned for Gujarat.

The projects have been sanctioned between 2005-06 and 2009-10. The key areas of development are water supply, sewerage, solid-waste management, storm-water drainage, mass-rapid transport system, construction of flyovers and water treatment.

Gujarat Infrastructure Development Board (GIDB) has been constituted for conceiving infrastructure projects, developing and preparing them. GIDB also conducts pre-feasibility and feasibility studies for various projects.

### Other Reforms

Municipal Accounting

Solid-Waste Management

Energy Efficiency

## Development Projects: Key Public Private Partnership Projects

| Project Name                              | Sector   | PPP Type | Project Cost (US\$ million) | Stage        |
|---|----------|----------|-----------------------------|--------------|
| Hazira LNG Terminal                       | Ports    | BOOT     | 806.5                       | In Operation |
| Dahej LNG Terminal                        | Ports    | BOOT     | 497.2                       | In Operation |
| Mundra Port                               | Ports    | BOOT     | 467.6                       | In Operation |
| Himmatnagar Bypass                        | Roads    | BOT-Toll | 152.2                       | In Operation |
| Gandhidham-Palanpur Railway Project       | Railways | BOT-Toll | 108.7                       | In Operation |
| Rajkot Bypass & Gondal Jetpur             | Roads    | BOT-Toll | 96.4                        | Construction |
| Surendranagar-Pipapav Railway Project     | Railways | BOT      | 88.0                        | In Operation |
| Ahmedabad - Mehsana Road                  | Roads    | BOT-Toll | 76.0                        | In Operation |
| Dahej-Bharuch Gauge Conversion            | Railways | BOT      | 42.8                        | Construction |
| Vadodara-Halol Toll Road                  | Roads    | BOT-Toll | 38.0                        | In Operation |
| Transport Nagar at Ahmedabad              | Roads    | BOT      | 32.9                        | Construction |
| Viramgam Mehsana Gauge Conversion Project | Railways | BOT      | 22.38                       | In Operation |

*Source: pppindiadatabase.com; BOOT – Build-Own-Operate-Transfer; BOT – Build-Operate-Transfer*

## Development Projects: Special Economic Zones (SEZs) ... (1/3)

- As of October 2011, Gujarat had 45 formally approved SEZs, 6 in-principle approvals and 30 notified SEZs.
- Gujarat ranks first in terms of total area covered under SEZs in India. It is also a leading SEZ state with the highest geographical area of 29,424 hectares under SEZ development.
- Gujarat's three operational SEZs are:
  - Kandla SEZ
  - SUR SEZ
  - Surat Apparel Park
- It is the first state to formulate a SEZ policy, which includes flexible labour laws and exit options for investors.
- SEZs in Gujarat get a 10-year corporate tax holiday on export profit: 100 per cent for the initial five years and 50 per cent for the next five years.

SEZs with In-Principle Approvals\*

| Industry                         | Locations              | No. of SEZs |
|----------------------------------|------------------------|-------------|
| Free Trade and Warehousing Zones | Kandla, Kutch          | 2           |
| Multi Product                    | Valsad, Kutch, Bharuch | 3           |
| Plastic & Plastic Products       | Kutch                  | 1           |

\*As of October 2011  
Source: sezindia.nic.in

## Development Projects: Special Economic Zones (SEZs) ... (2/3)

Formally Approved SEZs\*

| Industry                   | Locations  | No. of SEZs |
|----------------------------|--|-------------|
| IT/ITes and Electronics    | Gandhinagar, Ahmedabad, Vadodara, Valsad, Gandhinagar        | 15          |
| Muti Product/ Services     | Jamnagar, Dahej, Mundra, Kandla, Gandhinagar, Bharuch, Kutch | 8           |
| Pharmaceuticals & Chemical | Ahmedabad, Bharuch, Kutch, Panoli                            | 7           |
| Engineering                | Ahmedabad, Vadodara, Amerli                                  | 4           |
| Textile & Apparel          | Ahmedabad, Anjar   | 3           |
| Oil and Gas                | Bharuch  | 2           |
| Gems & Jewellery           | Surat  | 1           |
| Ceramic & Glass            | Bharuch  | 1           |
| Biotech                    | Vadodara   | 1           |
| Handicraft                 | Kutch  | 1           |
| Non-Conventional Energy    | Kutch  | 1           |
| Food Processing            | Mehsana  | 1           |

\*As of October 2011  
Source: sezindia.nic.in

## Development Projects: Special Economic Zones (SEZs) ... (3/3)

Notified SEZs\*

| Industry                      | Locations                        | No. of SEZs |
|-------------------------------|----------------------------------|-------------|
| IT/ITes and Electronics       | Ahmedabad, Gandhinagar, Vadodara | 10          |
| Pharmaceuticals and Chemicals | Ahmedabad, Bharuch               | 6           |
| Multi-Product                 | Jamnagar, Bharuch, Kutch         | 4           |
| Multi-Services                | Gandhinagar                      | 1           |
| Engineering                   | Vadodara, Amerli, Ahmedabad      | 3           |
| Textile and Apparel           | Ahmedabad, Kutch                 | 2           |
| Gems and Jewellery            | Surat                            | 1           |
| Non-Conventional Energy       | Kutch                            | 1           |
| Biotechnology                 | Vadodara                         | 1           |
| Oil and Gas                   | Bharuch                          | 1           |

\*As of October 2011  
Source: sezindia.nic.in

## Social Infrastructure – Education ... (1/2)

- Gujarat has a literacy rate of 79.3 per cent according to the provisional data of Census 2011; the male literacy rate is 87.2 per cent and the female literacy rate is 70.7 per cent.
- In 2009-10, the state has around 42,145 primary schools with over 8.6 million students enrolled.
- ‘Kanya Kelavani’ is a state-wide girl child education campaign to increase enrolment ratio and decrease drop-out rates.
- ‘Vidhyadeep Yojna’ has been implemented where in case of an unfortunate death of a child studying in the primary school, the parents or the guardians of the child are offered US\$ 1,097 as an insurance amount.

### Gujarat's School Education Statistics (2009-10)

|                     |   |
|---------------------|---|
| Number of Schools   | Primary: 42,145<br>Secondary: 9,299<br>Higher: 1405     |
| Pupil-Teacher Ratio | Primary: 35:1<br>Secondary: 35:1<br>Higher: 32:1        |
| Net Enrolment Ratio | Primary: 98.29  |
| Number of Teachers  | Primary: 244,331<br>Secondary: 86,775<br>Higher: 20,054 |

Source: Socio-Economic Review of Gujarat, 2010-11

### Literacy Rates (%)

|                 |      |
|-----------------|------|
| Literacy Rate   | 79.3 |
| Male Literacy   | 87.2 |
| Female Literacy | 70.7 |

Source: Census 2011 (provisional data)

## Social Infrastructure – Education ... (2/2)

- 'Sakshardeep' is a literacy campaign for adult education. The total of 526,259 persons had taken benefit under Sakshardeep programme 2007.
- Society for Creating of Opportunity through Proficiency in English (SCOPE) is an initiative of the government to make Gujarati youth proficient in business English.

| No. of Seats in Technical Education (2009-10)* |        |
|--|--------|
| Engineering                                    | 35,016 |
| MBA  | 7,030  |
| Pharmacy                                       | 5,678  |
| MCA  | 3,580  |
| Architecture                                   | 436    |

### Premier Educational and Research Institutions in Gujarat

- Indian Institute of Management, Ahmedabad
- Indian Institute of Technology, Gandhinagar
- Sardar Vallabhbhai National Institute of Technology, Surat
- Institute of Rural Management (IRMA), Anand
- Mudra Institute of Communications, Ahmedabad (MICA)
- National Institute of Fashion Technology (NIFT), Gandhinagar
- National Institute of Design, Ahmedabad
- Centre for Environment Planning and Technology, Ahmedabad
- Central Salt and Marine Chemicals Research Institute, Bhavnagar

Source: Socio-Economic Review of Gujarat, 2010-11

\*In Degree (full time) Course

MBA: Master of Business Administration

MCA: Master of Computer Application

## Social Infrastructure – Health ... (1/2)

- Gujarat is in the forefront of establishing and maintaining good health infrastructure.
- The state has 1,110 Primary Health Centres (PHC), 7,274 Sub-centres, 291 Community Health Centres (CHC), 97 Mobile Healthcare Units, 24 District Hospitals and 26 Sub-district Level Hospitals.
- During 2009-10, 33.6 million patients were treated outdoors while 3.6 million patients were treated indoors through the government institutions.

| Health Indicators (2009) |      |
|--------------------------|------|
| Birth Rate*              | 22.3 |
| Death Rate*              | 6.9  |
| Infant Mortality Rate**  | 48   |

Source: Sample Registration System 2009

\*Per thousand persons

\*\*Per thousand live births

| Health Infrastructure (December 2010)      |       |
|--|-------|
| Primary Health Centres                     | 1,110 |
| Sub-Centres                                | 7,274 |
| Community Health Centres                   | 291   |
| Mobile Healthcare Units                    | 97    |
| District Hospitals                         | 24    |
| Sub-District Level Hospitals               | 26    |
| Major Hospital with Educational Institutes | 6     |
| Government Dental Hospital                 | 2     |

Source: Socio-Economic Review of Gujarat, 2010-11

## Social Infrastructure – Health ... (2/2)

### Key Health Schemes of Gujarat Government

#### Chiranjeevi Scheme

- Introduced to reduce maternity-related deaths and infant mortality; involves collaborations between government and private sector specialists to facilitate safe deliveries for the economically weaker sections.

#### Bal Sakha Yojna

- An initiative under the Chiranjeevi Scheme.
- Provided facilities for proper check up of newborns and infants by paediatricians. The main aim of the scheme is to bring down the Infant Mortality Rate (IMR) and the Maternal Mortality Rate (MMR).

#### Centre-Aided Health Insurance Scheme

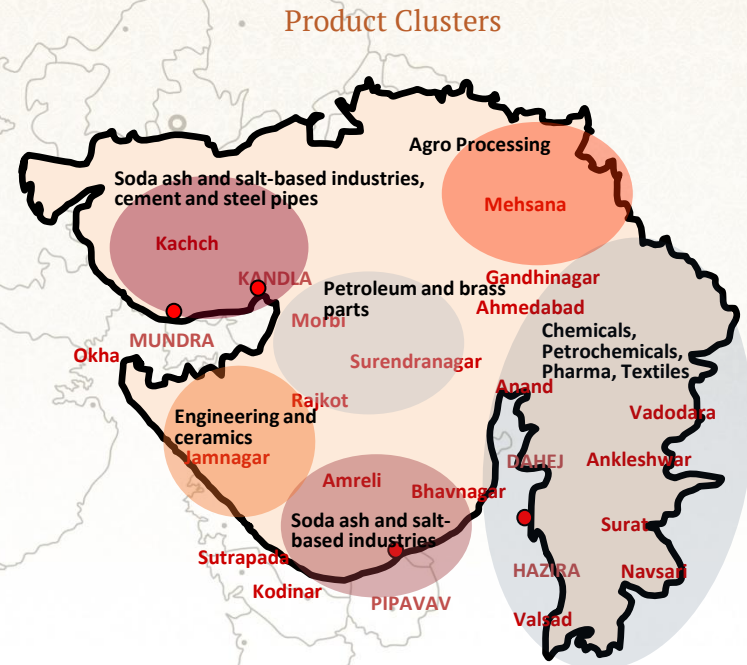
- The scheme has been launched in five districts in Gujarat and covers about 650,000 families with income-level in the Below Poverty Line (BPL) category.
- Total insured amount is about US\$ 650 per family.

## Cultural Infrastructure

- Various dance forms of the state include Dandiya Raas, Garba, Garbi, Rasaka, Tippani and Padhar.
- Many fairs and festivals are celebrated in the state such as Bhavnath Mahadev Mela, Dangs Darbar, Vichitra Mela, Dhrang Fair, Trinetreshwar Mahadev Fair, Vautha Mela, Shamlaji Mela, Kutch Mahotsav, Bhadra Purnima, Kavant Mela, Modhera (dance festival), Makar Sankranthi, International Kite Festival (Uttarayan) and Navrathri Festival.
- Museums in the state include The Gandhi Smarak Sangrahalaya (Ahmedabad), Calico Museum of Textiles (Ahmedabad), Vadodara Museum (Vadodara), Maharaja Fatehsingh Museum (Vadodara), Gandhi Museum (Bhavnagar), Kite Museum (Ahmedabad), Watson Museum (Rajkot) and the Lady Wilson Museum (Valsad).
- Prominent stadiums in the state include the Sardar Patel Cricket Stadium (Ahmedabad), Moti Bagh Stadium (Vadodara), Indian Petrochemicals Corporation Ltd (IPCL) Sports Complex (Vadodara) and the Surat Indoor Stadium. Golf courses in the state include Gaekwad Baroda Golf Club (Vadodara), Gulmohar Greens Golf & Country Club (Ahmedabad), Aalloa Hills Golf Resort (Ahmedabad), Kensville Golf and Country Club (Ahmedabad), Cambay Golf Club (Gandhinagar), and an integrated Golf Course in Ganesh Housing Corporation (Ahmedabad).
- A world-class sporting infrastructure complex is coming up in Ahmedabad in 2011 at a cost of US\$ 65 million. The facility which will incorporate a 25,000 seat stadium, is a collaboration between the Government of Gujarat and SE TransStadia Private Limited.

## Industrial Infrastructure

- The state's manufacturing industry is supported by 0.2 million MSMEs.
- Gujarat has 83 product clusters. The Cluster Development Scheme has been launched for furthering the growth of product clusters.
- Successful clusters include ceramics cluster at Morbi, brass-parts cluster at Jamnagar, fish-processing cluster at Veraval and power-looms cluster at Ahmedabad.
- Gujarat has 202 industrial estates established by the Gujarat Industrial Development Corporation (GIDC) for specific sectors such as chemicals, electronics, gems, apparels and granite.
- The State Government has taken care to set up industrial estates on non-agricultural land after assessment of industrial viability.



Source: Industries Commissionerate, Government of Gujarat

# Gujarat

NOVEMBER  
2011

THE GROWTH ENGINE OF INDIA

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- ❖ State Acts & Policies



For updated information, please visit [www.ibef.org](http://www.ibef.org)

## Key Industries ... (1/2)

- Gujarat contributes 15.5 per cent to the industrial output of the country.
- There are 12 major industry groups that together account for 86 per cent of total factories, 96 per cent of total fixed capital investment, 94 per cent of the value of output and 95 per cent of value-addition in the state's industrial products.
- Gujarat is a leader in several industrial sectors such as chemicals, petrochemicals, dairy, drugs and pharmaceuticals, cement and ceramics, gems and jewellery, textiles and engineering.
- The industrial sector comprises of over 800 large industries and over 345,000 micro, small and medium industries.

### Key Industries in Gujarat

- Agro and Food Processing
- Dairy
- Chemicals and Petrochemicals
- Textiles and Apparels
- Engineering and Auto
- Gems and Jewellery
- Oil and Gas
- Pharmaceuticals and Biotechnology
- IT
- Minerals
- Ports
- Power
- Tourism

Source: Government of Gujarat website

## Key Industries ... (2/2)

→ Home to India's first Liquefied Natural Gas (LNG) port terminal at Hazira.

→ Petroleum accounts for the highest industrial production in Gujarat with a 34 per cent share. It is followed by chemicals and pharmaceuticals with 27 per cent share.

→ Gujarat is:

→ The world's largest producer of processed diamonds and wall clocks.

→ The world's largest gas-based, single-location sponge iron plant.

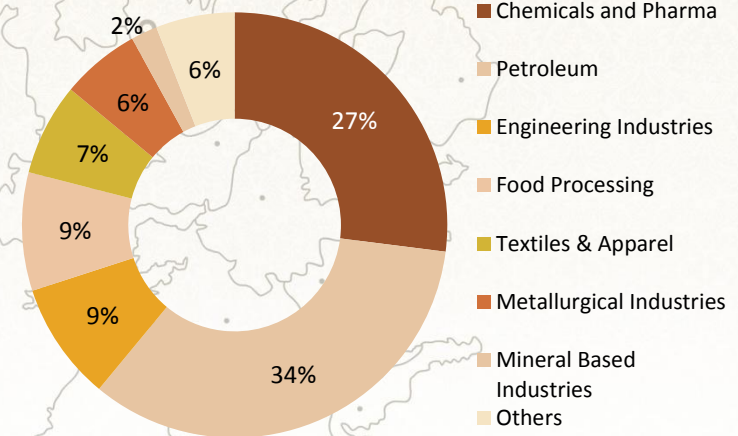
→ The world's largest producer of castor and cumin.

→ The world's third largest producer of denim.

→ Asia's largest grassroots petroleum refinery at Jamnagar.

→ India's largest producer of cotton.

Share of Industry Sectors in Gujarat



Source: Industries Commissionerate, Gujarat Government

## Key Players



## Key Industries – Agro and Food Processing ... (1/3)

- The agro sector including animal husbandry, contributed 13.8 per cent to Gujarat's GSDP in 2009-10.
- Cotton, Groundnut, Bajra, Paddy, Maize, Jowar, Sesamum, Castor, and Tur (Pigeon pea) along with fodder and vegetables are the major kharif crops of the state. Normal area under kharif cultivation is 8.9 million hectares.
- There were 205 Agriculture Produce Market Committees (APMCs), 198 main yards and 202 sub market yards operational in the state during 2009-10.
- Gujarat Agro Industries Corporation (GAIC) promotes agricultural activities at the ground-level and aids the development of agro industries in the state.

### Some of the Key Players

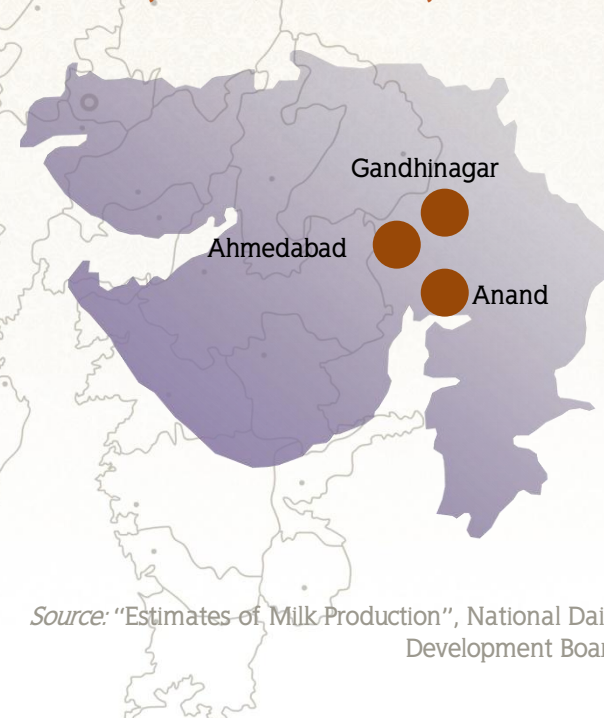
- Amul
- Parle Products Pvt Ltd
- Vadilal
- Rasna

## Key Industries – Agro and Food Processing – the Dairy Industry ... (2/3)

- Gujarat's dairy sector consists of 13 district milk producers' unions.
- There are around 13,761 milk co-operative societies in the state.
- The total milk production in Gujarat was 8.8 million tonnes in 2009-10.
- The National Dairy Development Board in Anand is involved in promoting, financing and supporting milk-distribution organisations across India.
- GCMMF, a cooperative dairy giant, sells Amul and Sagar brands of dairy products through 500,000 unorganised retailers and 3,000 distributors.
- GCMMF became the first billion - dollar cooperative in 2006-07 and registered a turnover of US\$ 1.1. GCMMF recorded a turnover of US\$ 2.1 billion in 2010-11.

GCMMF: Gujarat Co-operative Milk Marketing Federation

### Key Districts in the Dairy Sector



Source: "Estimates of Milk Production", National Dairy Development Board

## Key Industries – Agro and Food Processing

... (3/3)

### Amul



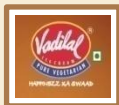
- The Anand Milk Union Limited (AMUL) was established in 1956 in Anand, Gujarat. Amul had revenues of US 2.1 billion during 2010-11.
- A market leader in butter, whole-milk, cheese, ice cream, dairy whitener, condensed milk, saturated fats and long-life milk.
- Daily average collection of 11.22 million litres of milk from 15,322 village societies in 2009-10.

### Parle Products Pvt Ltd



- India's largest manufacturer of biscuits, confectionery and fruit juices, for almost 80 years.
- Brands include Parle-G, Krackjack, Monaco, Hide and Seek, Poppins, Melody and Mango Bite.
- The company has a factory at Bhuj in Gujarat.

### Vadilal



- Established in 1907 at Ahmedabad. Manufactures ice-creams and frozen desserts.
- Exports processed products.
- Revenue of US\$ 53.6 million in 2010-11. Two manufacturing plants at Gujarat (in Ahmedabad and at Pundhra in Gandhinagar district).

### Rasna



- Started in 1984. Had 93 per cent market-share in Indian soft-drink concentrate market in 2009.
- Wide range of products in processed-foods category such as fruit jams, energy sports drink powder, fruit cordial, rose syrup and iced-tea.
- Largest capacity in Asia to make powder concentrate with seven facilities spread across India. The company is based in Ahmedabad.

## Key Industries – Textiles and Apparel ... (1/2)

- Gujarat is the largest producer (35 per cent) and exporter (60 per cent) of cotton in the country.
- As per Government of Gujarat's Socio-Economic Review-2010-11, technical textiles is a key emerging area with over 860 units in Gujarat.
- Textile contributes 6 per cent of the total industrial production in the state (organised sector).
- Over 40 per cent of the country's art-silk fabric is produced in Surat. Gujarat is the largest producer of denim in India (65 to 70 per cent) and the third-largest in the world.
- Textiles account for 21 per cent of total employment in the state. In 2008-09, the state contributed 33 per cent of mill-made fabric and 25 per cent power-loom fabric to the total fabric produced in the country.

| Area      | Textile Clusters  |
|-----------|---|
| Ahmedabad | Cotton and Blended Fabric, Denim, Made - ups, Ladies Dresses, Textile Machinery and Spare Parts.        |
| Surat     | Art-silk Fabric, Synthetic Textiles, Jari Manufacturing, Embroidery, Textile Machinery and Spare Parts. |
| Umargam   | Modern Power Looms, Synthetic Suiting and Shirting.   |
| Jetpur    | Hand Printing and Processing Units.   |
| Manavadar | Cotton Ginning  |
| Kutch     | Textile Handicrafts   |

### Some of the Key Players

- Arvind Ltd
- Ashima Group
- Digjam Ltd
- Raymond Ltd

## Key Industries – Textiles and Apparel

... (2/2)

### Arvind Ltd



- One of the top-three producers of denim in the world and largest producer in Asia.
- Product line includes fabrics (denims, shirtings, khakis and knitwear) and garments.
- Asia's first fabric-manufacturing unit to receive an ISO-14001 certification.
- Has the denim and voiles divisions at Ahmedabad; shirting, khakhi and knits divisions at Gandhinagar.

### Ashima Group



- 100 per cent cotton-fabric manufacturers and a vertically-integrated group with a turnover of over US\$ 100 million per annum.
- Registered office at Ahmedabad.
- Exports fabric to over 45 countries, markets to over 150 Indian garment exporters.

### Digjam Ltd



- Part of the S.K. Birla Group, the company was established in Jamnagar, Gujarat in 1949.
- The company manufactures fabrics for suiting and casual wear.
- It has restructured its business portfolios to focus on textile manufacturing and marketing of fabrics and ready-to-wear clothing under its own brands.

### Raymond Ltd



- With over 60 per cent market share in India, Raymond is one of the largest integrated manufacturers of worsted fabric in the world. The group is into textiles, engineering and aviation.
- Raymond Apparel Limited is a 100 per cent subsidiary of Raymond Limited.
- The plant at Vapi in Gujarat has production of 14 million metres per annum.

## Key Industries – Chemicals and Petrochemicals ... (1/2)

- Gujarat contributed about 51 per cent to the national production of chemicals in 2010-11.
- It is the highest contributor to the total national production of petrochemical products.
- Gujarat's contribution in the national production of the following is:
  - Soda ash: About 98 per cent
  - Salt: 78 per cent
  - Petrochemical: 62 per cent
  - Onshore Crude oil: 53 per cent
- The State Government is developing the Petroleum, Chemicals and Petrochemicals Integrated Region (PCPIR) at Dahej.

### Some of the Key Players

- Asian Paints Ltd
- Tata Chemicals Ltd
- Gujarat State Fertilisers and Chemicals Ltd
- Excel Industries Ltd

## Key Industries – Chemicals and Petrochemicals ... (2/2)

### Asian Paints Ltd



- It is India's largest paint company and ranks among the top ten decorative-coatings companies in the world.
- Asian Paints along with its subsidiaries has operations in 17 countries across the world and 23 paint manufacturing facilities.
- Manufacturing facility at Ankleshwar in Gujarat.

### Tata Chemicals Ltd (TCL)



- TCL is a global company with interests in chemicals, crop nutrition and consumer products. It is the world's second largest producer of soda-ash.
- Established in 1939 at Mithapur in Gujarat, TCL is a part of the Tata group. The plant has an installed capacity of 875,000 tonnes per annum; about 34 per cent of the country's capacity. The plant is one of the largest producers of synthetic soda ash in the world and has a five-star rating from the British Safety Council.

### Gujarat State Fertilisers and Chemicals Ltd



- Established in 1962. Fertiliser plant at Fertiliser Nagar (Vadodara), fibre unit at Kosamba, Di-Ammonia Phosphate (DAP) fertiliser unit at Sikka and polymer unit at Nandesari.
- Had revenue of US\$ 1.04 billion in 2010-11.

### Excel Industries Ltd



- Established in 1941, the company manufactures agro-chemicals, water treatment chemicals and polymer additives.
- Plants in Gujarat at Piplaj and Ahmedabad.
- Turnover of US\$ 59.8 million in 2010-11.

## Key Industries – Engineering and Automotive ... (1/4)

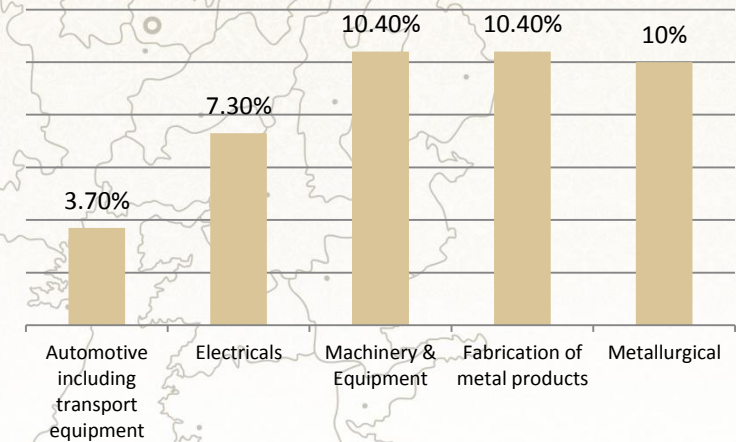
- The state's engineering and automotive sectors contribute 8 per cent to India's total industrial production and over 9 per cent to the national engineering output.
- The sector comprises more than 300 units in large sector and over 75,000 units in Small and Medium Enterprises (SME) sector (excluding repair and services) operating in the state.
- The state has 30 engineering product clusters.

### Share (%) of Engineering Sector in Gujarat's Industry

|                          |      |
|--------------------------|------|
| Factory (nos.)           | 29.0 |
| Employment               | 23.6 |
| Fixed Capital Investment | 7.2  |
| Value of Output          | 10.1 |
| Value Added              | 12.7 |

Source: "Engineering & Auto", Sector Profile, Government of Gujarat

### Share of Gujarat in National Engineering Sector Output



Source: Vibrant Gujarat 2011 - Engineering and Auto Industries Sector Profile, www.vibrantgujarat.com

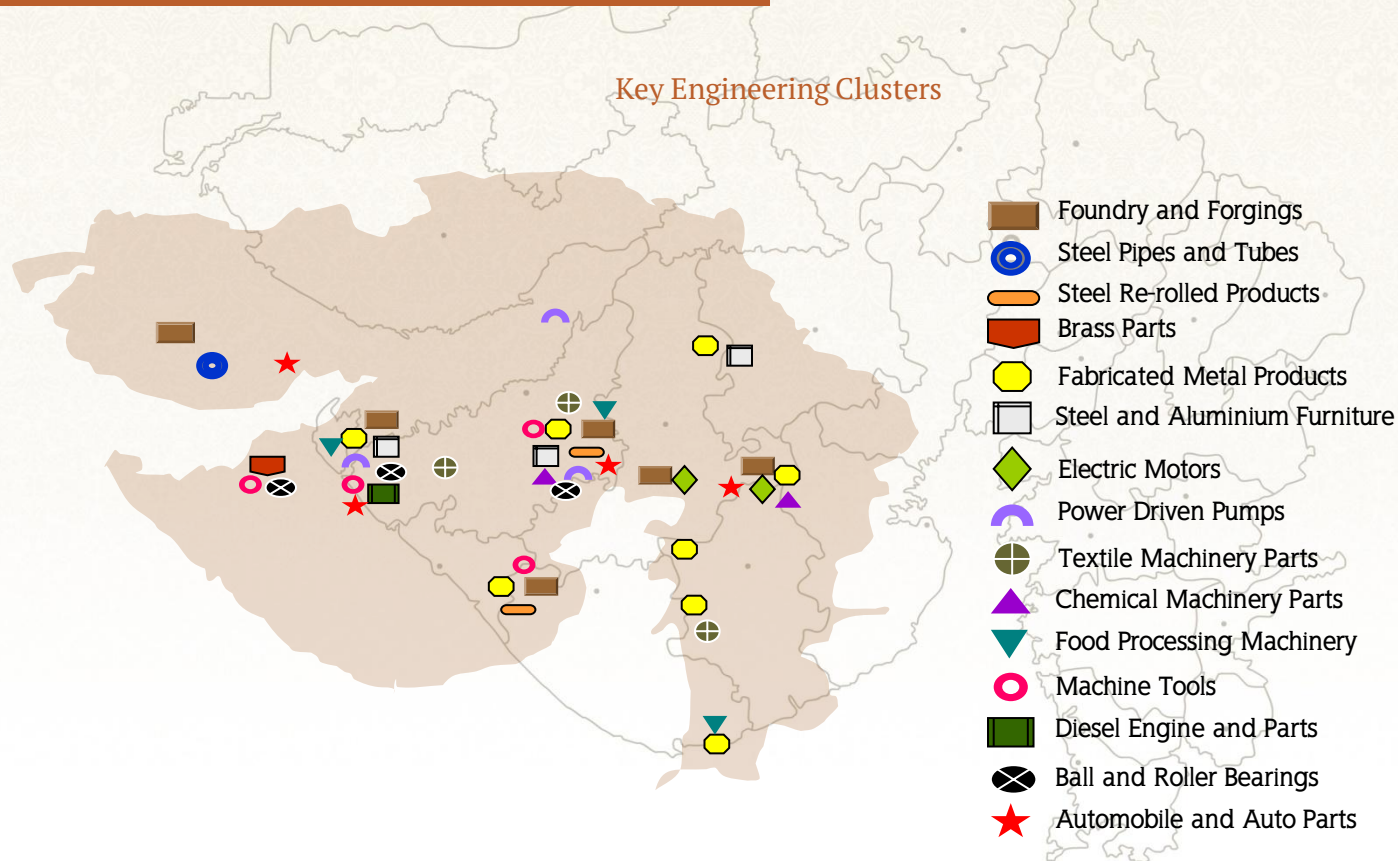
## Key Industries – Engineering and Automotive ... (2/4)

- Small-scale industry is a significant contributor to the national production of brass parts, foundry, forging and machine tools, oil engines and electric motors, submersible pumps and industrial valves and bearings.
- The brass parts cluster at Jamnagar has over 5,000 small units and meets almost the entire requirement for brass parts in India.
- General Motors has set up its automotive manufacturing facilities in Gujarat, providing a boost to its auto ancillary industry.

### Some of the Key Players

- ABB
- Larsen & Toubro (L&T)
- General Motors
- Panasonic

## Key Industries – Engineering and Automotive ... (3/4)



## Key Industries – Engineering and Automotive ... (4/4)

ABB



- Incorporated in 1949. The company manufactures cables and cable accessories, control systems, power products, semiconductors, reactors, drives, generator circuit breakers and insulation components.
- Manufacturing facility, training and operations centre located in Gujarat at Vadodara (Baroda); branch office at Ahmedabad. Had revenue of US\$ 31.5 billion in the year 2010.

Larsen & Toubro  
(L&T)



- L&T is a technology, IT, engineering, construction and manufacturing company.
- The Engineering Construction and Contracts (ECC) division of L&T is India's largest construction organisation in the country. Has a regional office at Ahmedabad.
- The company is setting up power and manufacturing plants at Hazira and Vadodara, to be completed by 2011-12. Has an investment of US\$ 1 billion and expected to provide employment to 5,000 persons.

General Motors



- Founded in 1908, GM is among the world's largest automobile makers. Headquartered in Detroit (USA), GM manufactures cars and trucks in 32 countries and has sales in 200 countries. GM has been the global automotive sales leader since 1931 and employs about 325,000 people globally.
- General Motors India, incorporated in 1994, became a fully-owned subsidiary of GM in 1999. Has a 45,000 sq m plant at Halol (Panchmahal) in Gujarat and produces brands such as the Chevrolet (Optra and Tavera) and Opel (Corsa and Sail).

Panasonic



- Panasonic (formerly known as Matsushita) is the largest Japanese electronics producer. Products include audiovisual and information/ communication equipment and home appliances.
- Among the first companies to establish a business unit in Gujarat in 1972 through a joint venture with the Indian company, Lakhanpal. Manufacturing unit located at Vadodara where it manufactures dry cell batteries.

## Key Industries – Gems and Jewellery

- Gujarat accounts for 72 per cent of the world's share of processed diamonds and 80 per cent of total diamonds processed in India.
- Contributes 90 per cent of total diamonds processed in India in 10,000 units in Surat.
- Eight out of 10 diamonds in the world are polished in Surat.
- The state has the highest labour productivity in the jewellery sector in India.
- It is also internationally renowned for the production of unique hand-made silver ornaments (85 per cent of total silver jewellery production of India).
- Renowned institutions such as the Indian Diamond Institute, Gujarat Hira Bourse, and the Gems and Jewellery Export Promotion Council provide skilled manpower for the industry.

## Key Industries – Oil and Gas ... (1/2)

- Gujarat ranks first in the production of crude oil (onshore: 53 per cent) and natural gas (onshore: 31 per cent) in India.
- The state has the highest number of oil and gas fields, both onshore and offshore, in India (31.3 per cent).
- Nearly 36.6 per cent of India's installed refining capacity is in the state of Gujarat.
- Oil and gas reserves are located at Ankleshwar, Mehsana, Tapti High, Hazira, Bharuch, Gandhar, Dahej, Jambusar, Palej and Kalol. Isolated gas fields are located around Ahmedabad.
- Gujarat has a 2,200 km state-wide integrated gas grid. It also has two LNG terminals at Hazira and Dahej. Two more terminals are proposed to be set up at Pipavav and Mundra.

### Key Players

- Cairn India
- IOCL (Indian Oil Corporation Limited)
- ONGC (Oil and Natural Gas Corporation Limited)
- Shell

### Key Players

### Oil and Gas Companies

|          |  |
|----------|--|
| Jamnagar | Reliance Industries Refinery: Third-Largest in the World; Essar Refinery |
| Dahej    | Petronet LNG's Re-gasification Terminal                                  |
| Hazira   | Shell and Total's LNG Terminal   |
| Vadodara | Indian Oil Corporation's Refinery  |
| Gandhar  | ONGC's Gas Processing Complex  |

## Key Industries – Oil and Gas ... (2/2)

### Indian Oil Corp Ltd (IOCL)



- IOCL is India's largest integrated oil refining and marketing company by sales, with a turnover of US\$ 68.8 billion in 2010-11. It is the 18th largest petroleum company in the world.
- It owns and operates 10 of India's 20 refineries; the company had a refining capacity of 65.7 MMTPA (1.3 million barrels per day). The refinery at Koyali is IOCL's largest with a capacity of 13.7 Million Metric Tonnes Per Annum (MMTPA).

### Cairn India



- The company operates the largest producing oil fields in the Indian private sector. Cairn India holds material exploration and production positions in 9 blocks across India along with new exploration rights elsewhere in India and one in Sri Lanka. Cairn has a 40 per cent share in the Cambay oil field; ONGC holds 50 per cent and Tata Petrodyne 10 per cent.
- It is building a 670 km long, heated and insulated crude oil pipeline from the Mangala Processing Terminal in Rajasthan to the Gujarat coast. When complete, the pipeline will give access to more than 75 per cent of India's refining capacity. The first phase was completed in May 2010.

### ONGC



- ONGC is India's leading exploration and production company for oil and gas. It has 240 onshore production installations, 69 drilling rigs and 17,500 km pipeline network.
- ONGC has a plant at Hazira; assets in Mehsana, Ahmedabad and Ankleshwar.
- The company has the Institute of Reservoir Studies (IRS) at Ahmedabad and regional office at Baroda.

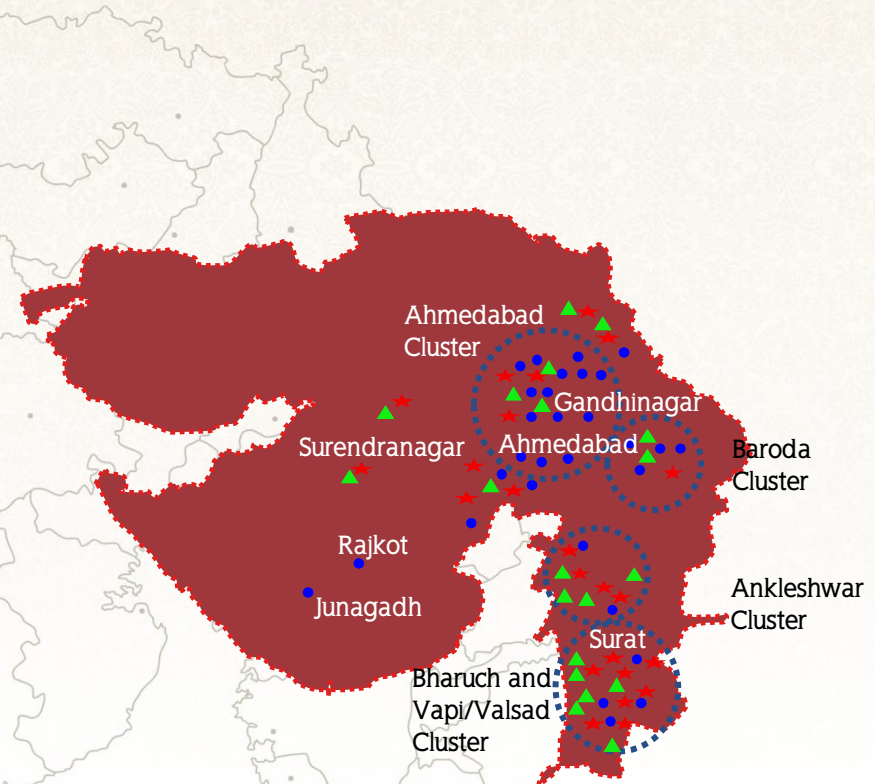
### Shell



- Shell is among the global leaders in oil, gas and petrochemicals sector, with interests in bio-fuels, wind, solar power and hydrogen. The company operates in over 130 countries, employing 108,000 people worldwide.
- It is a large and diversified international investor in India's energy sector. The company is the only global major to operate petro-fuel retail outlets in India. The Hazira LNG Terminal and port project is Shell's largest venture in India.

## Key Industries – Pharmaceuticals and Biotechnology ... (1/3)

- Gujarat accounted for 35 per cent of the national pharmaceutical production and around 22 per cent of pharma exports in 2010-11.
- The state accounts for 80 per cent of intravenous sets manufactured in the country.
- It has the largest number of clinical research organisations in India and over 100 companies with WHO-compliant manufacturing units.
- Gujarat has a considerable presence in homoeopathic medicine with 7,500 practitioners, 216 government dispensaries and 15 colleges.
- A Pharma Special Economic Zone (PhaEZ) is being established by Cadilla Pharma near Ahmedabad with about 30 units and an investment of US\$ 650 million.
- The landscape of Gujarat biotechnology industry consist of more than 50 biotechnology companies and 66 support organisations.



|   |                      |
|---|----------------------|
| • | Manufacturing        |
| ▲ | Academic Institution |
| ★ | R&D Organisation     |

## Key Industries – Pharmaceuticals and Biotechnology ... (2/3)

| Location                               | Biotech Zones (Proposed)                             |
|--|--|
| Ahmedabad-Surendranagar                | Biopharma Zone                                       |
| Jamnagar-Dwarka-Porbandhar             | Marine Biotech Zone                                  |
| Vadodara-Anand-Nadiad                  | Food and Food Processing for Animal Biotechnology    |
| Vapi-Surat-Bharuch-Ankleshwar          | Biochemical Engineering for Industrial Biotechnology |
| Junagadh-Bhavnagar-Banaskantha-Mehsana | Agri Biotechnology                                   |

| Some of the Key Players  |
|--|
| <ul style="list-style-type: none"> <li>• Sun Pharma</li> <li>• Bayer Cropscience</li> <li>• Quintles</li> <li>• Zydus Cadilla</li> </ul> |

| Location            | Biotech Zones (Proposed)  |
|---------------------|---------------------------|
| Vadodara            | Industrial Park           |
| Anand               | Food Biotechnology Park   |
| Jamnagar/Bhavnagar  | Marine Biotechnology Park |
| Gandhinagar/Mehsana | Agri Biotechnology Park   |

## Key Industries – Pharmaceuticals and Biotechnology ... (3/3)

### Sun Pharma



- Sun Pharma was established in 1983. It manufactures Active Pharmaceutical Ingredients (APIs) and specialty pharmaceuticals. The company has 17 manufacturing plants in three continents and reported revenues of US\$ 435.7 million during 2010-11.
- Sun Pharmaceutical Advanced Research Centre (SPAC) is situated in Vadodara (Baroda). Manufacturing plants in Gujarat are located at Vapi, Halol, Ankleshwar, Ahmednagar and Vadodara.

### Bayer Cropscience



- Bayer is a global enterprise with core competencies in the fields of healthcare, nutrition and high-tech materials. In India, Bayer operates five companies including Bayer Cropscience, which offers a range of products and it has service back-up for modern agriculture and non-agricultural applications. The company has three business groups: crop protection, environmental science and bio-science.
- It has two factories in Gujarat, at Ankleshwar and Himatnagar.

### Quintiles



- Quintiles is a fully integrated biotech and pharmaceutical services provider offering clinical, commercial, consulting and capital solutions. Key services in India include biostatistics, data management, clinical monitoring, central laboratory services, electrocardiogram monitoring services, project management and regulatory services.
- Quintiles India, the Indian subsidiary, has four offices in India. The research laboratory of the company is located at Ahmedabad.

### Zydus Cadila



- Zydus Cadila is a leading pharmaceuticals company with sales of US\$ 992.1 million in 2010-11. Product line includes formulations, APIs, diagnostics, health-foods and diet-foods, skin care and animal healthcare products. Focus areas for exports include cardiovascular, gastrointestinal and pain management.
- Production units are located in Ahmedabad, Vadodara and Ankleshwar for manufacturing tablets, injectibles, capsules, liquids and APIs.

## Key Industries – Shipbuilding Industry

- There are several shipyards present in Gujarat such as ABG Shipyard, Alcock Ashdown and the Vipul Shipyard.
- The infrastructure available for development of the shipbuilding industry includes:
  - Availability of raw materials such as ship building plates and engines
  - Stillness of water and deep draft
  - Proximity to ancillary industries
  - Sufficient anchorage space
- New shipyards are being established in Pipavav and Hazira. They will be accommodated in a cluster of shipyards called Marine Shipbuilding Parks that will have common infrastructure and ancillary facilities.
- A mega marine shipyard is proposed to be built at Dahej and in the Gulf of Kutch.



Source: Gujarat Maritime Board

## Key Industries – Tourism

- The state has a rich architectural and cultural heritage owing to its historical parentage of the Indus Valley Civilisation sites such as Lothal and Harappa. There are many forests and natural ecosystems, heritage monuments, beaches and coastal sites, gardens, lakes, archaeological and architectural sites in Gujarat.
- Eight tourism hubs have been created for the convenience of tourists visiting Gujarat. They are in Ahmedabad-metro, Ahmedabad (North Gujarat); Surat (South Gujarat), Vadodara (Central Gujarat), Rajkot, Junagadh and Jamnagar (Saurashtra) and Bhuj (Kutch).
- The year 2006 was celebrated as Tourism Year in Gujarat to promote it as a key tourist destination of India.
- Gujarat received “Best Tourism Pavilion” award in 2008 at Asia’s biggest Tourism and Travel exhibition - “SATTE-2008” held at New Delhi.
- In 2010-11, around 19.8 million tourists visited the state.

# Gujarat

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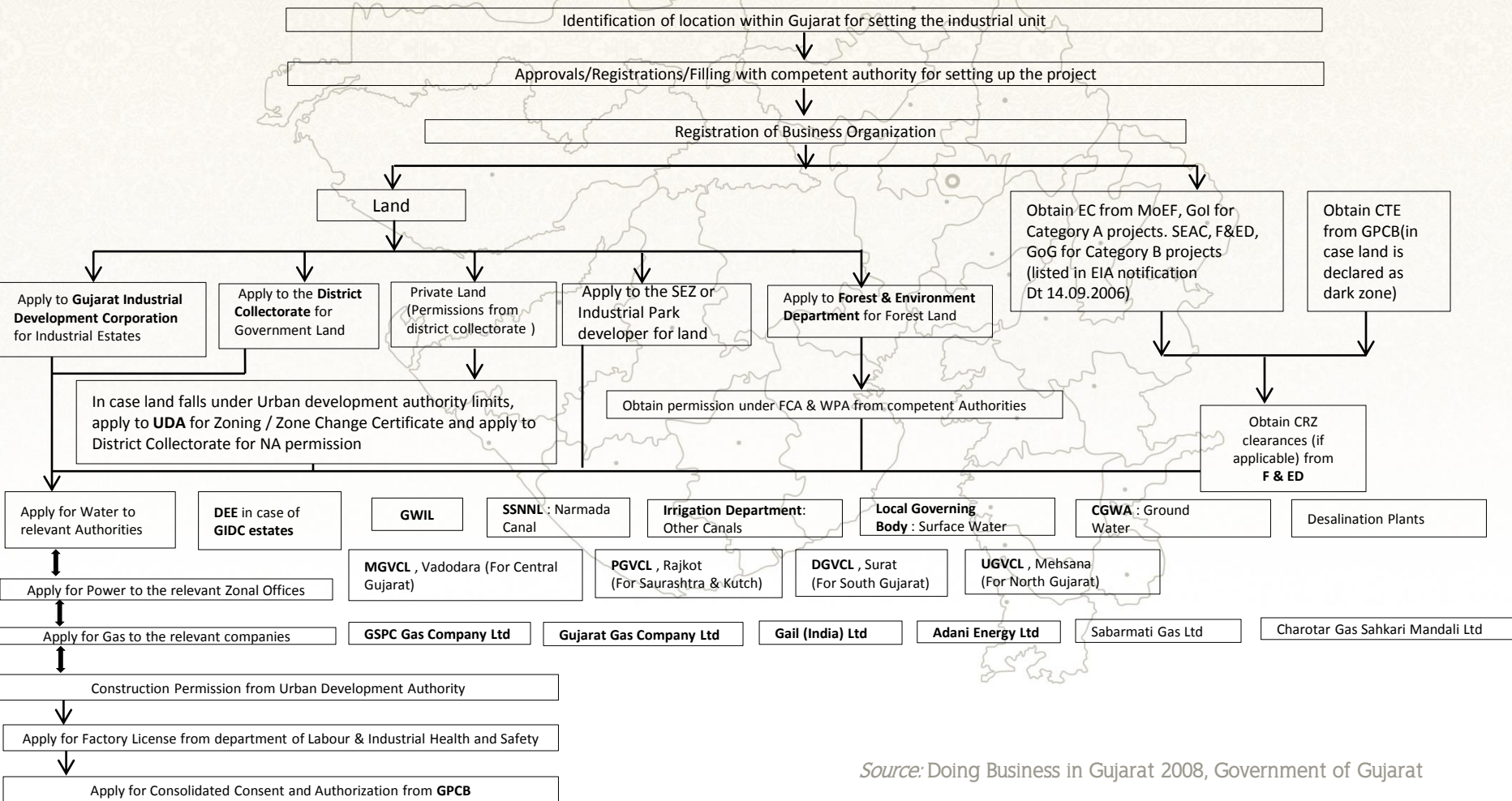
## Contents

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## A Roadmap for Doing Business in Gujarat



Source: Doing Business in Gujarat 2008, Government of Gujarat

## Key Investment Promotion Offices ... (1/4)

| Agency  | Description   |
|---|---|
| Industrial Extension Bureau (iNDEXTb)             | <ul style="list-style-type: none"> <li>• Promotes investment in industrial and infrastructure projects, acts as a single-point contact.</li> <li>• Identifies new investment opportunities and prepares project profiles.</li> <li>• Prepares and publishes status reports and status papers on different industry groups.</li> <li>• Coordinates with various government departments, chambers of commerce and industry associations at the state and central levels.</li> </ul> |
| Gujarat Industrial Development Corporation (GIDC) | <ul style="list-style-type: none"> <li>• Premier promotional agency, for providing all basic infrastructure to the industries in Gujarat.</li> <li>• Develops industrial estates at strategic locations all over the state.</li> <li>• Also offers basic amenities in industrial estates.</li> <li>• Develops functional estates to fulfill specific needs of certain industries.</li> <li>• Checks environmental degradation by resorting to specific measures.</li> </ul>       |
| Gujarat Agro Industries Corporation (GAIC)        | <ul style="list-style-type: none"> <li>• Promotes agricultural activities at the ground level and helps in development of agro industries.</li> <li>• Accelerates demand-based production of agro products to develop agro industries in the new global agricultural environment.</li> </ul>  |

## Key Investment Promotion Offices ... (2/4)

| Agency  | Description  |
|---|--|
| Gujarat Small Industries Corporation (GSIC)     | <ul style="list-style-type: none"> <li>• Encourages the growth of industries in the SSI sector.</li> <li>• Acts as an authorised distributor and stockist of steel producers.</li> <li>• Assists SSI units by providing imported/indigenous raw materials.</li> </ul>  |
| Gujarat Infrastructure Development Board (GIDB) | <ul style="list-style-type: none"> <li>• Attracts private sector investment in infrastructure development projects</li> <li>• Frames policies for involvement of other public sector infrastructure development agencies.</li> <li>• Liaison with banks and other financial institutions interested in financing infrastructure projects.</li> </ul> |
| Gujarat State Financial Corporation (GSFC)      | <ul style="list-style-type: none"> <li>• Finances industrial units in Gujarat and the Union Territories of Dadra and Nagar Haveli.</li> <li>• Provides financial assistance to new and existing SSI units.</li> <li>• Offers finance to SSI units for obtaining ISO-9000 certification, marketing and sales promotion activities.</li> </ul>         |

## Key Investment Promotion Offices ... (3/4)

| Agency                                   | Description  |
|--|--|
| Industries Commissionerate               | <ul style="list-style-type: none"> <li>• The commissionerate functions under the Industries, Mines and Tourism Department of Government of Gujarat, and implements industrial policies of the state and central governments.</li> <li>• Promotes development, monitors and controls functions for planned industrial developments in tiny, small, medium and large sectors, through a network of district industry centres, attached offices and industrial promotion corporations.</li> </ul> |
| Gujarat Power Corporation Limited (GPCL) | <ul style="list-style-type: none"> <li>• Acts as a nodal agency for augmenting power generating capacity through private sector participation.</li> <li>• Identifies power projects based on different fuels and prepares techno-economic feasibility reports.</li> <li>• Obtains approvals from relevant authorities to prepare Power System Master Plan for the state.</li> </ul>  |
| Gujarat Maritime Board (GMB)             | <ul style="list-style-type: none"> <li>• Contributes to the development of vital port infrastructure.</li> <li>• Synchronises with hinterland development.</li> <li>• Identifies green field ports for development.</li> <li>• Specifies missing links in roads and railways and suggests upgrading existing links to facilitate easier approach to port locations.</li> </ul>   |

## Key Investment Promotion Offices ... (4/4)

| Agency   | Description   |
|--|---|
| Gujarat Industrial Investment Corporation Limited (GIIC) | <ul style="list-style-type: none"> <li>• Finances medium and large scale industries.</li> <li>• Arranges finance for large projects available in consortium with other central and state-level financial institutions and banks.</li> <li>• Provides Infrastructure financing and offers a variety of financial packages.</li> </ul>  |
| Tourism Corporation of Gujarat Limited (TCGL)            | <ul style="list-style-type: none"> <li>• Identifies tourism potential in the state.</li> <li>• Undertakes the task of developing tourism and related commercial activities.</li> <li>• Maintains and upgrades tourism infrastructure and hotel projects with the help of privatised professional services.</li> <li>• Encourages investment for development of tourism-related infrastructure.</li> </ul> |

## Contact List ... (1/2)

| Agency  | Contact Information  |
|---|--|
| Industrial Extension Bureau                       | Block No 18, 2nd Floor<br>Udyog Bhavan, Sector-11,<br>Gandhinagar-382 017<br>Phone: 91-79-23250492/93<br>Fax: 91-79-23250490<br>E-mail: <a href="mailto:indextb@indextb.com">indextb@indextb.com</a>   |
| Gujarat Industrial Development Corporation (GIDC) | Block No 4, 2nd Floor<br>Udyog Bhavan, Sector-11<br>Gandhinagar - 382 017<br>Phone: 91-79-2325 0636, 2325 0637<br>Fax: 91-79-2325 0587, 2325 9359<br>E-mail: <a href="mailto:gmdevad1@sancharnet.in">gmdevad1@sancharnet.in</a>  |
| Gujarat Agro Industries Corporation (GAIC)        | Khet Udyog Bhavan ,<br>Opp. Old Gujarat High Court,<br>Navrangpura, Ahmedabad-380 014<br>Phone: 91-79-2754 4741/42/43<br>Fax: 91-79-2754 2518<br>E-mail: <a href="mailto:gaicltdad1@sancharnet.in">gaicltdad1@sancharnet.in</a> , <a href="mailto:gaicltd@gujagro.org">gaicltd@gujagro.org</a> |
| Gujarat Small Industries Corporation (GSIC)       | Block Nos.6 & 8,<br>Udyog Bhavan, 6th Floor,<br>Sector-11, Gandhinagar - 382 011<br>Phone: 91-79-3223 653, 3232 280<br>Fax: 91-79-3232 166   |

## Contact List ... (2/2)

| Agency   | Contact Information   |
|--|---|
| Gujarat Industrial Investment Corporation Limited (GIIC) | Block No 11 & 12, 6th Floor,<br>Udyog Bhawan, Sector-11,<br>Gandhinagar-382 011<br>Phone: 91-79-2324 9641-44<br>Fax: 91-79-2323 6230                                    |
| Gujarat State Financial Corporation (GSFC)               | Block No 10, 1st Floor,<br>Udyog Bhavan, Sector-11<br>Gandhinagar - 382 011<br>Phone : 91-79-23256793<br>Fax : 91-79-2325 2204<br>E-mail: webmaster-gsfc@gujarat.gov.in |
| Gujarat Infrastructure Development Board (GIDB)          | Block No 18, 8th Floor ,<br>Sector-11, Udyog Bhavan<br>Gandhinagar - 382 017<br>Phone: 91-79-23232701/ 4<br>Fax: 91-79-23222481<br>E-mail: gidb@gidb.org                |
| Industries Commissionerate                               | Block No 1, 2nd Floor, Udyog Bhavan<br>Gandhinagar - 382 010<br>Phone : 91-79-23252683, 23252617<br>E-mail: iccord@gujarat.gov.in                                       |

## Key Approvals Required ... (1/4)

| Approvals and Clearances Required                                | Departments   |
|--|---|
| Approvals/Registration/Filing Information for Setting up Project | <ul style="list-style-type: none"> <li>• SSI Registration – District Industries Centre (DIC)</li> <li>• Industrial Entrepreneur’s Memorandum (IEM) – DIC/ Industries Commissionerate, Government of Gujarat</li> <li>• Filing Industrial Entrepreneur’s Memorandum (IEM) and Letter of Intent (LoI) – Secretariat for Industrial Assistance, Ministry of Commerce and Industry, Government of India</li> <li>• Letter of Permission (LoP) - The Development Commissioner, Kandla Special Economic Zone, Ministry of Commerce and Industry, Government of India, Kandla (Dist. Kutch), Gujarat</li> <li>• For automatic approvals - The Development Commissioner, Kandla Special Economic Zone, Ministry of Commerce and Industry, Government of India, Kandla (district Kutch), Gujarat.</li> <li>• For other industries - Secretariat for Industrial Assistance, Ministry of Commerce and Industry, Government of India, New Delhi.</li> </ul> |
| Registration of Business Organisation                            | <ul style="list-style-type: none"> <li>• Registrar of Partnership Firms, Government of Gujarat for partnership firms and Registrar of Companies, Government of India (office located in Ahmedabad) for corporations.</li> </ul>   |
| Acquisition of Land  | <p>Authority for lands:</p> <ul style="list-style-type: none"> <li>• In GIDC estate - Concerned office of GIDC</li> <li>• Government land - Concerned district collector or collector/district development officer</li> <li>• Private land (purchase of agricultural land for non-agricultural use) – Private land owner</li> <li>• Forest land - Ministry of Forest &amp; Environment, State Wild Life Board, National Wild Life Board and Supreme Court (for land reserved for wildlife sanctuaries or national parks).</li> </ul>  |

## Key Approvals Required ... (2/4)

| List of Approvals and Clearances Required | Respective Departments of States   |
|---|--|
| Clearance from Pollution Control Board    | No Objection Certificate (NOC) to be obtained from Gujarat Pollution Control Board (GPCB)<br>Environmental clearance:- Ministry of Environment and Forest and Government of Gujarat (State Impact Assessment Committee).   |
| Arrangement of Power                      | <ul style="list-style-type: none"> <li>• GIDC estates - Zonal office</li> <li>• Locations other than GIDC estates - Zonal distribution company</li> <li>• Captive power - Gujarat Energy Transmission Corporation Limited (GETCO)</li> </ul>   |
| Arrangement of Gas                        | Gujarat State Petroleum Corporation (GSPC) or private distributor.   |
| Arrangement of Water                      | <p>Authority depends on the location of unit:<br/>                     Proximity to Narmada Canal – Sardar Sarovar Narmada Nigam Limited (SSNNL)<br/>                     For drawing canal/underground water other than Narmada Canal – Irrigation department.<br/>                     For drawing water from the pipeline of Gujarat Water Infrastructure Limited (GWIL) – GWIL<br/>                     Surface water – Local governing bodies (municipal corporations)<br/>                     For the usage of ground water for industrial purposes from the area falling under dark zone, over-exploited area or saline area – The Superintendent, from Gujarat, Gujarat Water Resources Development Corporation (GWRDC)<br/>                     Water supply for industrial purposes within GIDC estate–Deputy Executive Engineer of the concerned estate.</p> |
| Approval of Building Plans                | <p>Authority depends on location of the unit, if the unit is located:</p> <ul style="list-style-type: none"> <li>• In GIDC estates – GIDC executive engineer in the region.</li> <li>• Inside and Outside GIDC estates – Director, Industrial Safety and Health, is authorised to give approval to plans of the premises, equipment layout and process layout, registration of factory and grant of licenses.</li> </ul>   |

## Key Approvals Required ... (3/4)

| Approvals and Clearances Required   | Departments   |
|---|---|
| Approval from Labour Department   | Labour Commissioner   |
| Approval from Commercial Tax Department   | Value-Added Tax (VAT) registration and Central Sales Tax (CST) registration: Respective area officer in whose jurisdiction the chief place of business falls. |
| Mining Lease Approval   | Department of Geology and Mining  |
| Boiler Registration   | Chief Inspectorate, Steam and Boiler, Government of Gujarat   |
| Handling of Hazardous Items   | Director of Industrial Safety and Health, Government of Gujarat   |
| Storage of Explosive Materials  | Directorate of Explosives, Government of India  |
| Customs Bonding for 100 per cent Export Oriented Units Located Outside Special Economic Zones | Collector of Customs & Central Excise, Government of India  |
| Quality Certification   | Bureau of Indian Standards (office located in Gujarat)  |

## Key Approvals Required ... (4/4)

| Sector-Specific Approvals                      |  |
|--|--|
| Sector   | Authority  |
| Food and Drug Manufacturing Units              | Commissionerate of Food & Drug Administration, Government of Gujarat |
| Registration for Milk Products                 | Milk and Milk Products Board, New Delhi                              |
| Projects Located within 500 m of the Coastline | Gujarat Maritime Board   |

Single-Window Clearance  
Industrial Extension Bureau (iNDEXTb) provides single point contact for all investment activities in Gujarat

Source: Doing Business in Gujarat 2008

## Cost of Doing Business in Gujarat

| Cost Parameter                               | Cost Estimates                        | Source   |
|--|---------------------------------------|--|
| Cost of Land (per sq ft)                     | US\$ 10 to US\$ 150                   | Industry Sources                                       |
| Hotel Room Cost (per night)                  | US\$ 40 to US\$ 180                   | Indian Hotel Survey                                    |
| Office Space (rent per sq ft per annum)      | US\$ 4 to US\$ 12                     | Industry Sources                                       |
| Residential Space (rent per sq ft per annum) | US\$ 2 to US\$ 6.5                    | Industry Sources                                       |
| Power Cost (per kWh)                         | Energy Charges: US\$ 0.07 to US\$ 0.1 | Gujarat Urja Vikas Nigam Limited                       |
| Labour Cost (minimum wage per day)           | US\$ 2.2 to US\$ 4.1                  | Ministry of Labour and Employment, Government of India |

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## State Acts & Policies ... (1/3)

### Shipbuilding Policy 2010

#### Objectives

- To explore potential as well as resources available on the Gujarat coast for shipbuilding.
- To enhance industrial growth of the state by encouraging establishment of downstream ancillary industries.

[Read more](#)

### Gujarat Industrial Policy 2009

#### Objective

- To facilitate investments in the state, generate employment and adhere to high quality standards.

[Read more](#)

### Power Generation Policy 2009

#### Objectives

- To develop the state of Gujarat as a power-generation hub.
- To have adequate availability of power in the state for agriculture, households, industry etc.

[Read more](#)

## State Acts & Policies ... (2/3)

### Solar Power Policy 2009

#### Objectives

- To promote power generation of green and clean power in the state using solar energy.
- To promote employment generation and skill enhancement of local youth.

[Read more](#)

### IT Policy 2006-2011

#### Objectives

- Overall growth of IT sector in Gujarat.
- To endeavor for rapid expansion and growth of knowledge based economy in the state.

[Read more](#)

### Gujarat State Mineral Policy 2003

#### Objectives

- To explore opportunities in the sector of mineral resources of the state.
- To enhance efficiency by adopting e-governance.

[Read more](#)

## State Acts & Policies ... (3/3)

### SEZ Policy of Gujarat, 2002

#### Objective

- To encourage investment and export oriented units in the state through specified facilities and concessions.

[Read more](#)

### Agro Industrial Policy, 2000

#### Objective

- To make Gujarat the destination of choice for investors and processors, both global and domestic.

[Read more](#)

### Gujarat Port Policy

#### Objectives

- To promote Gujarat's share in ports.
- To attract private sector investment in the existing minor and intermediate ports.

[Read more](#)

### Gujarat Road Policy

#### Objectives

- To facilitate investments in the road sector.
- To induct more scientific principles of resource allocation for maintenance and new construction programmes.

[Read more](#)

## Annexure

### Exchange Rates

| Year    | INR equivalent of one US\$ |
|---------|----------------------------|
| 2004-05 | 44.95                      |
| 2005-06 | 44.28                      |
| 2006-07 | 45.28                      |
| 2007-08 | 40.24                      |
| 2008-09 | 45.91                      |
| 2009-10 | 47.41                      |
| 2010-11 | 45.57                      |

Average for the year

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