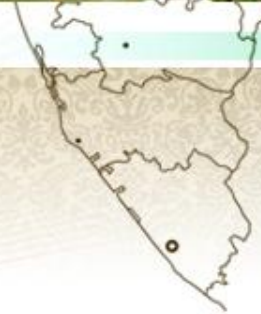


# Kerala

NOVEMBER  
2011

GOD'S OWN COUNTRY



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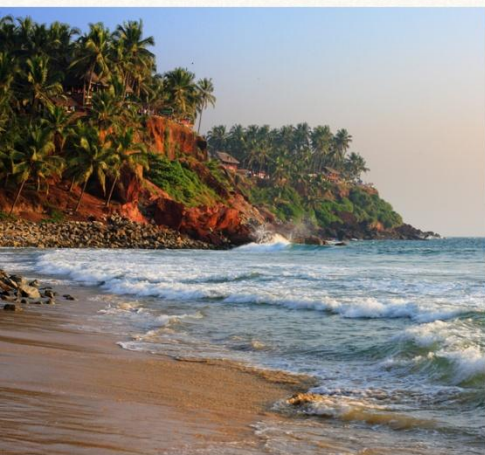
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## Contents

- ❖ Kerala – An Introduction
- ❖ Infrastructure Status
- ❖ Business Opportunities
- ❖ Doing Business in Kerala
- ❖ State Acts & Policies



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## Kerala Factfile



Source: Maps of India

- Kerala is located along the coastline, to the extreme South-West of the Indian peninsula, flanked by the Arabian Sea on the West and the mountains of the Western Ghats on the East. The state has a coastline of 580 km.
- Kerala has the highest literacy rate among all the states in the country. Malayalam is the most commonly spoken language. Hindi, English and Tamil are the other languages used.

- Kochi, Kozhikode, Kollam, Thrissur, Alappuzha, Palakkad, Thalassery, Ponnani and Manjeri are some of the key cities in the state.
- There are 44 rivers flowing through Kerala, the major ones being the Periyar (244 km), the Bharathapuzha (209 km), and the Pamba (176 km).

| Parameters                              | Kerala             |
|-----------------------------------------|--------------------|
| Capital                                 | Thiruvananthapuram |
| Geographical area (sq km)               | 38,863             |
| Administrative districts (No)           | 14                 |
| Population density (persons per sq km)* | 859                |
| Total population (million)*             | 33.38              |
| Male population (million)*              | 16.02              |
| Female population (million)*            | 17.36              |
| Sex ratio (females per 1,000 males)*    | 1,084              |
| Literacy rate (%)*                      | 93.9               |

Sources: Kerala at a Glance, Government of Kerala Website, [www.kerala.gov.in](http://www.kerala.gov.in)

\*Provisional Data – Census 2011

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

| Parameter                                | Kerala     | All-States  | Source                                                                   |
|------------------------------------------|------------|-------------|--------------------------------------------------------------------------|
| <b>Economy</b>                           |            |             |                                                                          |
| GSDP as a percentage of all states' GSDP | 4.0        | 100         | CMIE, as of 2009-10, current prices                                      |
| Average GSDP growth rate (%)*            | 14.0       | 15.5        | CMIE, 2004-05 to 2009-10, current prices                                 |
| Per capita GSDP (US\$)                   | 1,419.7    | 1,302.4     | CMIE, as of 2009-10, current prices                                      |
| <b>Physical Infrastructure</b>           |            |             |                                                                          |
| Installed power capacity (MW)            | 3,718.8    | 173,626.4   | Central Electricity Authority, as of March 2011                          |
| GSM cellular subscribers (No)            | 26,050,158 | 618,284,322 | Cellular Operators Association of India, as of September 2011            |
| Broadband subscribers (No)               | 699,429    | 10,737,850  | Ministry of Communications & Information Technology, as of November 2010 |
| National Highway length (km)             | 1,457      | 70,934      | Ministry of Road Transport & Highways, Annual Report 2010-11             |
| Major and minor ports (No)^              | 1+17       | 12 +187     | Indian Ports Association                                                 |
| Airports (No)                            | 3          | 133         | Airport Authority of India                                               |

\*Calculated in Indian Rupee Terms  
^Minor Ports Include Intermediary Ports

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

| Parameter                              | Kerala | All-States | Source                                                                   |
|----------------------------------------|--------|------------|--------------------------------------------------------------------------|
| <b>Social Indicators</b>               |        |            |                                                                          |
| Literacy rate (%)                      | 93.9   | 74.0       | Provisional Data – Census 2011                                           |
| Birth rate (per 1,000 live birth)      | 14.7   | 22.5       | SRS Bulletin, 2009                                                       |
| <b>Investment</b>                      |        |            |                                                                          |
| FDI equity inflows (US\$ billion)      | 0.4*   | 132.9      | Department of Industrial Policy & Promotion,<br>April 2000 to April 2011 |
| Outstanding Investments (US\$ billion) | 150.4  | 7449.3     | CMIE (2009-10)                                                           |
| <b>Industrial Infrastructure</b>       |        |            |                                                                          |
| PPP projects (No)                      | 33     | 808        | www.pppindiadatabase.com                                                 |
| SEZs (No)                              | 20     | 380        | Notified as of October 2011,<br>www.sezindia.nic.in                      |

PPP: Public Private Partnership, SEZ: Special Economic Zone, SRS: Sample Registration System  
\*Including Lakshadweep

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

### Agricultural and IT Centre

Kerala is a leading agricultural state in the country, specialising in rubber, spices and coir production. It has also been promoting knowledge-based industries such as IT/ITeS, computer hardware, and biotechnology.

### Policy and Fiscal Incentives

The state offers a wide range of fiscal and policy incentives for businesses under the Industrial Policy, 2007. Additionally, the state has well drafted sector-specific policies.

### Rich Labour Pool

Kerala has a large base of skilled labour, making it an ideal destination for knowledge-based sectors. The state has the highest literacy rate in the country.

## Advantage Kerala ... (2/2)

### Facilitating Infrastructure

The state has well-developed social, physical and industrial infrastructure and virtual connectivity. Physical infrastructure includes power, airport and port infrastructure.

### High Economic Growth

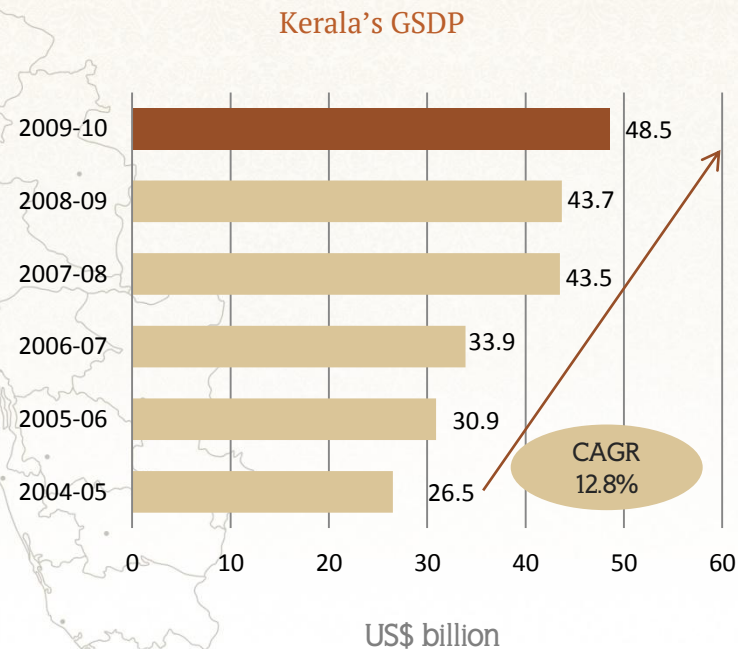
The state's GSDP grew at a CAGR (Compound Annual Growth Rate) of 12.8 per cent between 2004-05 and 2009-10.

### Cultural Diversity and Well-Developed Tourism Sector

Known as "God's own Country", Kerala is one of the few states to have marketed its natural beauty successfully to the leisure tourism sector. Its unique heritage and cultural diversity have helped attract tourists from the world over.

## Economic Snapshot – GSDP

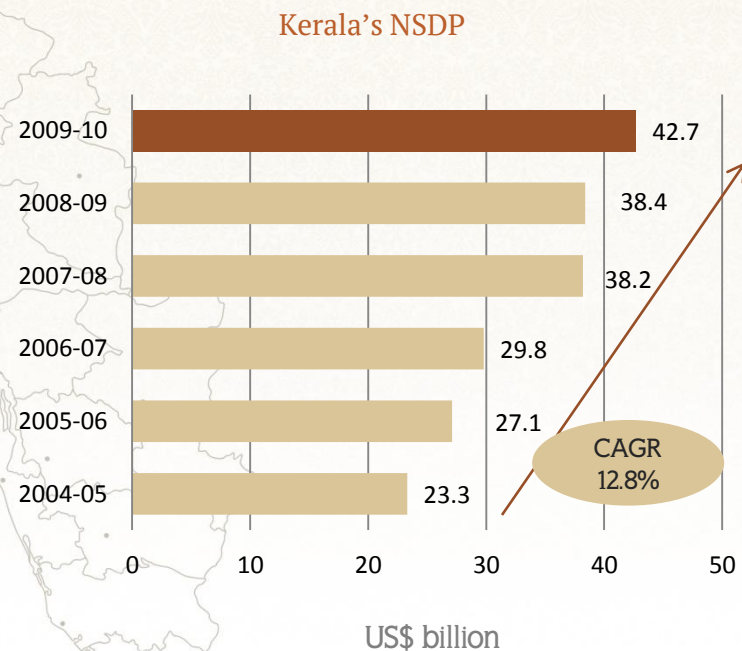
- At current prices, the Gross State Domestic Product (GSDP) of Kerala was about US\$ 48.5 billion in 2009-10.
- The state's GSDP grew at a CAGR of 12.8 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – NSDP

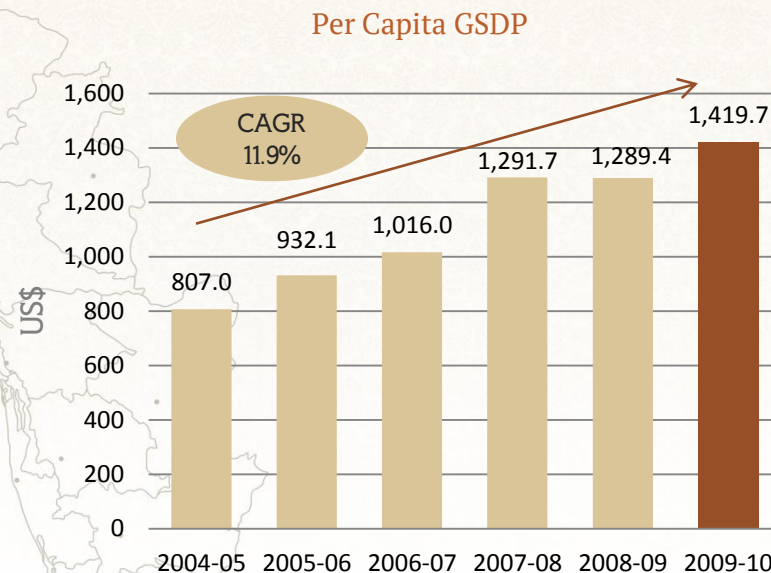
- At current prices, the Net State Domestic Product (NSDP) of Kerala was about US\$ 42.7 billion in 2009-10.
- The NSDP grew at a CAGR of 12.8 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – Per Capita GSDP

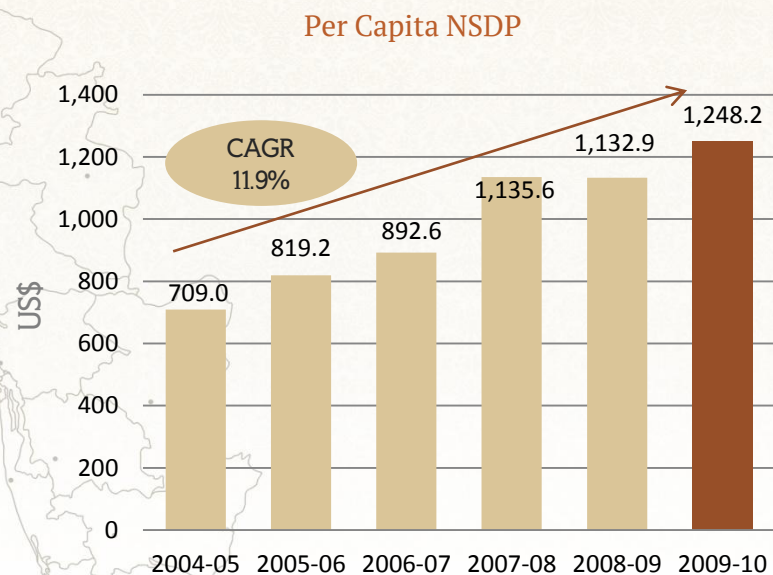
- The state's per capita GSDP in 2009-10 was US\$ 1,419.7 as compared to US\$ 807 in 2004-05.
- The per capita GSDP increased at a CAGR of 11.9 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – Per Capita NSDP

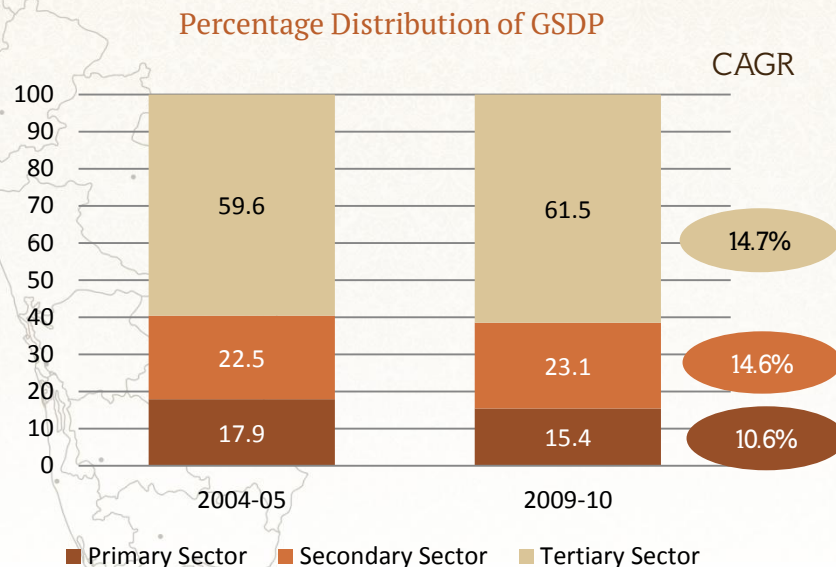
- The state's per capita NSDP in 2009-10 was US\$ 1,248.2 as compared to US\$ 709 in 2004-05.
- The per capita NSDP increased at a CAGR of 11.9 per cent between 2004-05 and 2009-10.



Source: CMIE

## Economic Snapshot – Percentage Distribution of GSDP

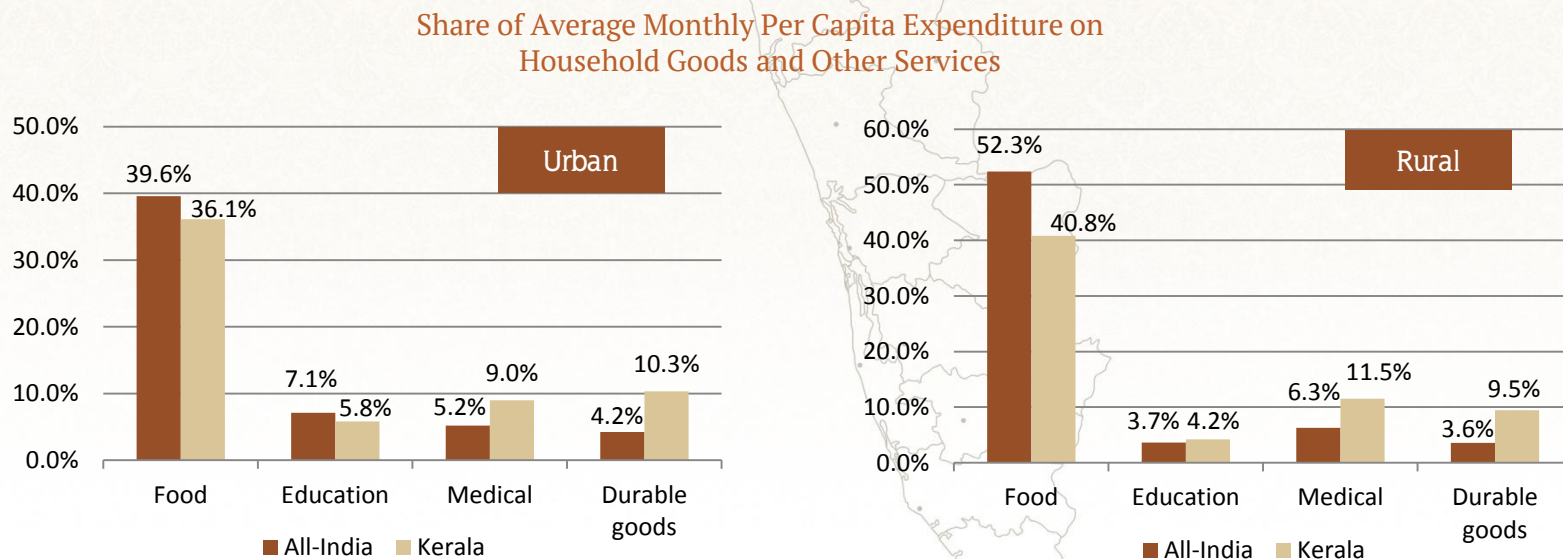
- In 2009-10, the tertiary sector contributed 61.5 per cent to the state's GSDP at current prices. It was followed by the secondary sector at 23.1 per cent.
- The tertiary sector grew at an average rate of 14.7 per cent between 2004-05 and 2009-10; driven by trade, hotels, real estate, finance, insurance, transport, communications and other services.
- The secondary sector grew at an average rate of 14.6 per cent during the period 2004-05 and 2009-10. Its growth was driven by manufacturing, construction, electricity, gas and water supply.
- The primary sector grew at an average rate of 10.6 per cent between 2004-05 and 2009-10.



Source: CMIE

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

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



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

## Economic Snapshot – Agricultural Production

- Agriculture and allied sectors contributed 11.47 per cent to the GSDP of Kerala in 2009-10.
- Kerala enjoys monopoly in pepper production in the country, contributing 86 per cent of the total pepper production in 2008-09.
- India is the fourth-largest producer of natural rubber and Kerala accounts for 91 per cent of the total rubber production in the country in 2008-09.
- In 2009-10, the agriculture income of the state amounted to US\$ 3,519 million.

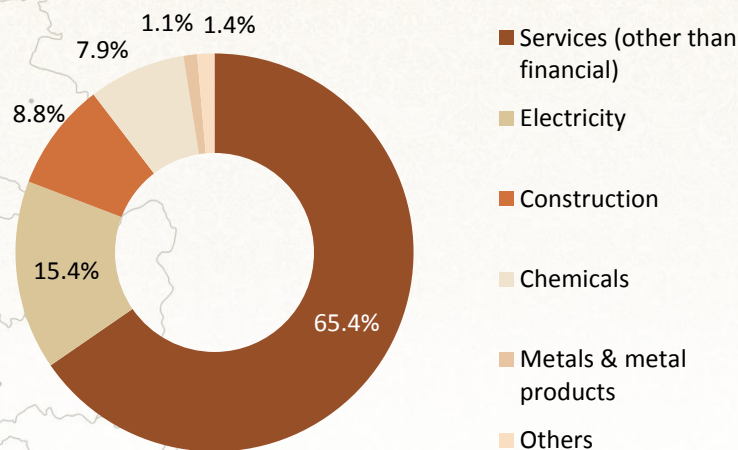
| Crop            | Annual Production (P)<br>in 2009-10 (metric tonnes) |
|-----------------|-----------------------------------------------------|
| Tapioca         | 2,525,383                                           |
| Rubber          | 745,510                                             |
| Rice            | 598,339                                             |
| Banana          | 408,405                                             |
| Other Plantains | 381,109                                             |
| Arecanut        | 127,893                                             |
| Coffee          | 59,250                                              |
| Tea             | 57,809                                              |
| Pepper          | 37,899                                              |
| Cashewnut       | 36,450                                              |
| Ginger          | 28,605                                              |
| Cardamom        | 7,800                                               |
| Turmeric        | 6,065                                               |
| Coconut         | 5,667*                                              |
| Pulses          | 3,390                                               |

Source: Economic Review of Kerala, 2010  
P: Provisional  
\*Million Nuts

## Economic Snapshot – FDI Inflows & Investments

- According to the Department of Industrial Policy & Promotion, the cumulative FDI inflows to the state from April 2000 to April 2011 amounted to US\$ 428 million (including Lakshadweep).
- In 2009-10, the outstanding investments in the state amounted to US\$ 150.4 billion.
- Of the total outstanding investments, the services (other than financial) sector accounted for around 65.4 per cent followed by electricity sector (15.4 per cent).
- Recent investments in the state have been the Integrated Infrastructure Development Centre at Kidangoor, Kinfra International Apparel Parks Ltd (KIAP) at Thiruvananthapuram, Kinfra Film and Video Park at Thiruvananthapuram, International Convention Centre Complex (ICCC) at Thiruvananthapuram, Technocity (Phase-IV expansion programme of Technopark in Thiruvananthapuram), Technopark Phase-III and a deep water port at Vizhinjam, near Thiruvananthapuram.

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



Others include food & beverages, textiles, non-metallic mineral products, machinery, mining and irrigation

Source: CMIE

## Economic Snapshot – Export Trends

- Historically, Kerala has been a major exporter of commodities such as tea, cashew kernel, sea-food, coir products, spices and coffee.
- In 2009-10, the total quantity of exports from Cochin port was 3.5 million tonnes.

### Exports from Kerala (through Cochin Port) – 2009-10

| Commodity      | Quantity (MT) | Value (US\$ Million) |
|----------------|---------------|----------------------|
| Cashew Kernels | 54,284        | 344.9                |
| Sea Food       | 138,106       | 319.1                |
| Coir Products  | 176,105       | 111.8                |
| Coffee         | 30,781        | 89.9                 |
| Tea            | 114,926       | 87.4                 |
| Spices         | 81,787        | 66.2                 |

Source: Economic Review of Kerala, 2010  
MT: Metric Tonnes

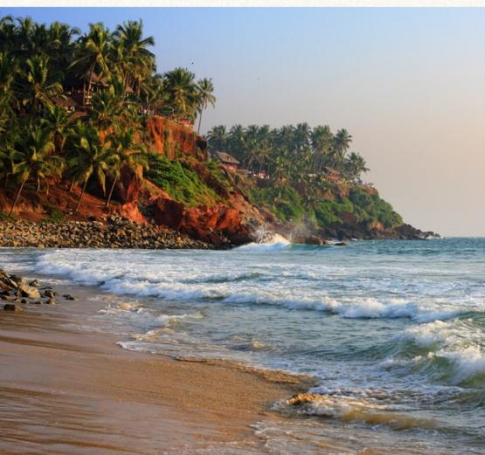
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## Physical Infrastructure – Roads



Source: Maps of India

- Kerala has 151,652 km of road length with nearly 1,457 km of National Highways.
- The state is well-connected to its neighbouring states and other parts of India through nine National Highways.

- Agencies maintaining roads in the state include the Public Works Department (PWD), panchayats, municipalities, corporations, the departments of forests, irrigation, railways and the Kerala State Electricity Board (KSEB).
- PWD roads constitute 16 per cent of the total road network.
- The Kerala State Transport Project (KSTP) was established in June 2002 to improve the 1,600 km of state roads and 77 km of inland-canals with the use of geographic information system.
- As of May 2011, The Kerala State Road Transport Corporation (KSRTC) provides road transport services in Kerala and operates 5,730 buses.

| Road Type         | Road Length (km) |
|-------------------|------------------|
| National Highways | 1,457            |
| State Highways    | 4,341            |
| District Roads    | 18,900           |

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

## Physical Infrastructure – Railways



Source: Maps of India

- Kerala is well-connected to the other parts of the country via the railways. As of 2010, it had a railway network of 1,198 km with around 200 railway stations.
- The State Government has appointed Kerala State Industrial Development Corporation Ltd (KSIDC) as nodal agency for developing a project to establish a North-South High Speed Rail Corridor (HSRC) to facilitate smooth and speedy passenger movement between various cities and towns in the state.
- Railway divisions at Thiruvananthapuram, Palakkad and Madurai jointly carry out railway operations in Kerala.

Source: Economic Review of Kerala, 2010

## Physical Infrastructure – Airports



Airport

Source: Maps of India

- The state has three airports, handling both domestic and international flights. They are located at Thiruvananthapuram, Kochi and Kozhikode.
- Together, they handled 45,715 international flights, carrying 4.9 million passengers and 36,598 domestic flights, carrying 1.9 million passengers, in 2008-09.
- The Cochin International Airport Limited (CIAL) is the first green field airport in India, set up in the Public Private Partnership (PPP) mode.
- CIAL is developing 450 acre of area around the airport as an aerotropolis to support the IT/ITes Technopark with residential and commercial space.
- A new terminal at Thiruvananthapuram airport has been inaugurated in July 2010.
- Construction of the proposed International airport at Kannur spread over 2,000 acres, is started.

## Physical Infrastructure – Ports

- There are 18 ports in Kerala, of which Kochi is the major port. In addition, there are three intermediate and 14 minor ports.
- In 2009-10, the total trade volume handled at the Kochi port was 17.4 Million Tonnes (MT), registering an increase of 12.5 per cent compared to the previous year.
- The Kochi port handled 3.93 Million Tonnes Per Annum (MTPA) of containers during 2009-10.
- Kerala is constructing the Vizhinjam deep-water international container trans-shipment terminal at Vizhinjam, 7 km south of Thiruvananthapuram, under the Public Private Partnership (PPP) mode.

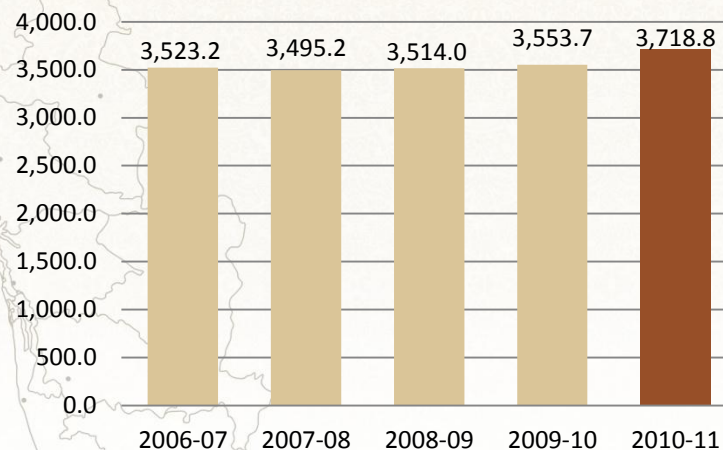
| Ports              |                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Major Ports        | <ul style="list-style-type: none"> <li>• Kochi</li> </ul>                                                                                                                                                                                                                                                                                                              |
| Intermediate Ports | <ul style="list-style-type: none"> <li>• Neendakara</li> <li>• Alappuzha</li> <li>• Kozhikkode</li> </ul>                                                                                                                                                                                                                                                              |
| Minor Ports        | <ul style="list-style-type: none"> <li>• Vzhinjam</li> <li>• Valiyathura</li> <li>• Thankasserry</li> <li>• Kayamkulam</li> <li>• Manakkodam</li> <li>• Munambam</li> <li>• Ponnani</li> <li>• Beypore</li> <li>• Vadakara</li> <li>• Thalasserry</li> <li>• Manjeswaram</li> <li>• Neeleswaram</li> <li>• Kannur</li> <li>• Azhikkal</li> <li>• Kasaragode</li> </ul> |

Sources: Cochin Port Trust,  
Kerala Ports, www.keralaports.gov.in

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

- As of March 2011, the state had an installed power capacity of 3,718.8 MW which consisted of 2,261.9 MW under state utilities, 1,261 MW under centre utilities and 195.8 MW under private sector.
- Of the total installed power capacity, 1,595.8 MW was contributed by thermal power, Hydro power contributed 1,881.5 MW of capacity. The contribution by nuclear and renewable power capacities were 95.6 MW and 145.8 MW, respectively.
- Kerala produces 83 per cent of its energy through hydroelectric power plants, and the remaining 17 per cent through thermal and captive power generation plants.

Installed Power Capacity (MW)



Source: Central Electricity Authority

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

- The Kerala Government has planned to set up a 4,000 MW power project in the next 10 years. This would help in reducing energy shortage and in promoting new industrial investments.
- Kerala State Electricity Board (KSEB) manages the state's power generation, transmission and distribution. It has 9.7 million domestic, commercial, agricultural and industrial consumers.
- The Energy Policy of Kerala lays down the need to develop renewable energy sources and provides government support for the same.

### Power Generating Stations in Kerala

- Hydel Plants Under KSEB: 23
- KSEB Thermal Plants: 2
- Central-Sector (NTPC) Owned Thermal Plant: 1
- Private Hydel Stations: 2

## Physical Infrastructure – Telecom

- Kerala has a tele-density of 96.6 per cent as compared to an all-India average of 66.1 per cent as of December 2010.
- The state has 1,245 telephonic exchanges. About 98 per cent of Kerala's telephone exchanges have Internet connectivity through the National Internet Backbone (NIB).
- VSNL has an international communication gateway at Kochi, with two high-speed submarine cable landings (SEA-ME-WE-3 and SAFE), offering 15 Gigabit per second (Gbps) bandwidth.
- According to Department of Telecommunications, Government of India, Kerala had nearly 30.1 million wireless subscribers and 3.3 million wire-line subscribers as of December 2010.
- The state is planning to build a telecom city near Technopark at Thiruvananthapuram with an investment of around US\$ 98.7 million.

### Telecom Infrastructure (December 2010)

|                           |            |
|---------------------------|------------|
| GSM Cellular Subscribers^ | 26,050,158 |
| Broadband Subscribers**   | 699,429    |
| Wireless Subscribers      | 30,132,206 |
| Wire-line Subscribers     | 3,314,886  |
| Post Offices*             | 5,070      |
| Telephone Exchanges       | 1,245      |

*Sources:* Economic Review of Kerala, 2010,  
Cellular Operators Association of India,  
Department of Telecommunications,  
Annual Report 2010-11,  
^As of September 2011  
\*As of 2009-10  
\*\*As of November 2010

### Some of the Major Telecom Operators in Kerala

Bharat Sanchar Nigam Limited (BSNL)  
Bharti Airtel  
Aircel Limited  
Vodafone Essar  
IDEA Cellular  
Tata Indicom  
Reliance Communications

## Development Projects: Urban Infrastructure

- Under the Jawaharlal Nehru National Urban Renewal Mission (JNNURM), 11 projects worth US\$ 220 million have been approved in the period 2006-2010 for the development of urban infrastructure in Thiruvananthapuram and Kochi.
- JNNURM projects have been sanctioned for improvement of water supply, sewerage, solid-waste management, traffic and transportation, tourism, drainage, land use, heritage and basic services to urban poor.
- The Kerala State Urban Development Project (KSUDP) is an Asian Development Bank assisted project covering the five municipalities of Thiruvananthapuram, Kochi, Kozhikode, Kollam, and Thrissur. With an investment of US\$ 154.7 million, the project focuses on urban infrastructure improvement, community upgrading, local government infrastructure development and capacity building and implementation assistance.
- Kerala Water Authority (KWA) is responsible for the design, construction, execution, operation and maintenance of most of the water supply schemes and also for the collection and disposal of the waste water in Kerala.
- “Kudumbashree”, the State Poverty Eradication Mission, is involved in “Clean Kerala Business” to collect door-to-door household waste and process it for economic benefit.

## Development Projects: Key Public Private Partnership Project ... (1/2)

→ Kerala has around 33 PPP projects, spread across sectors such as airports, roads, tourism, urban infrastructure and ports.

| Project Name                                                                     | Sector            | PPP Type    | Contract Authority                                                                             | Project Cost (US\$ million) |
|----------------------------------------------------------------------------------|-------------------|-------------|------------------------------------------------------------------------------------------------|-----------------------------|
| Kochi International Airport                                                      | Airports          | BOOT        | Airport Authority of India                                                                     | 75.4                        |
| Coimbatore Bypass Road                                                           | Roads             | BOT-Toll    | Department of Road Transport and Highways                                                      | 24.6                        |
| Development of Water Supply Project at Bekal Kasargod District                   | Tourism           | BOT-Annuity | Bekal Resorts Development Corporation                                                          | 4.2                         |
| Development of New Bridge Connecting Mattancherry and Willingdon Island at Kochi | Roads             | BOT-Toll    | The Greater Cochin Development Authority                                                       | 6.7                         |
| Development of a Super-Market at Vadakara                                        | Urban Development | BOT-Annuity | Vadakara Municipality                                                                          | 3.7                         |
| Development of Resorts at Bekal Kasaraode District                               | Tourism           | BOOT        | Bekal Resorts Development Corporation (BRDC) and Kerala Tourism Development Corporation (KTDC) | 13.7                        |
| Kochi Metro-Rail Project                                                         | Urban Development | BOT-Annuity | Kerala Industrial Infrastructure Development Corporation                                       | 758.2                       |

BOT: Build-Operate-Transfer, BOOT: Build-Own-Operate-Transfer

Source: www.pppindiaatabase.com

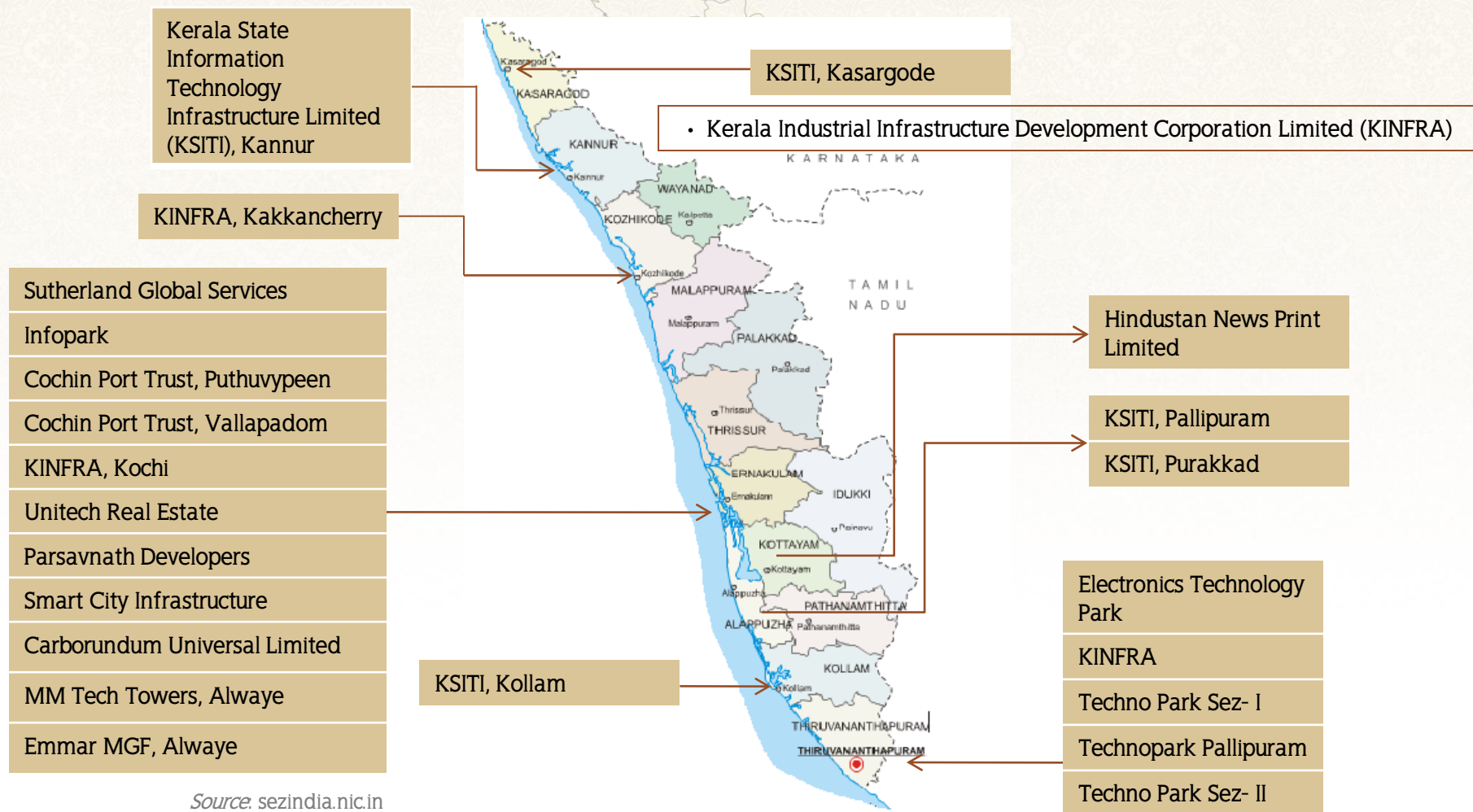
## Development Projects: Key Public Private Partnership Project ... (2/2)

| Project Name                                                 | Sector            | PPP Type    | Contract Authority                          | Project Cost (US\$ million) |
|--------------------------------------------------------------|-------------------|-------------|---------------------------------------------|-----------------------------|
| Six-Laning of Vadakkancherry Thrissur Section                | Roads             | BOT-Toll    | National Highways Authority of India (NHAI) | 153.5                       |
| Thrissur-Edapalli                                            | Roads             | BOT-Toll    | NHAI                                        | 77.6                        |
| Trivandrum City Road Improvement Project                     | Urban Development | BOT-Toll    | Kerala Road Fund Board                      | 27.9                        |
| Vallarpadam Container Transshipment Terminal                 | Ports             | BOT-Toll    | Cochin Port Trust                           | 526.9                       |
| Vizhinjam Port International                                 | Ports             | BOT-Annuity | Directorate of Ports, Government of Kerala  | 1,330.3                     |
| Four-Laning of Karnataka and Kerala Border to Kannur section | Roads             | BOT-Toll    | NHAI                                        | 257.1                       |
| Four-Laning of Walayar-Vadakkancherry section                | Roads             | BOT-Toll    | NHAI                                        | 151.6                       |
| Kannur-Kuttiapuram Package-2                                 | Roads             | BOT-Toll    | NHAI                                        | 291.5                       |
| Kannur-Kuttiapuram Package-1                                 | Roads             | BOT-Toll    | NHAI                                        | 303.5                       |

Source: www.pppindiadatabase.com

BOOT: Build-Own-Operate-Transfer, BOT: Build-Operate-Transfer

## Development Projects: SEZs



Source: sezindia.nic.in

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

- Kerala has the highest literacy rate among all states in the country. The state has a literacy rate of 93.9 per cent according to the provisional data of Census 2011; the male literacy rate is 96.0 per cent and the female literacy rate is 92.0 per cent.
- About 30 per cent of total students are enrolled in government schools, 61.7 per cent in government-aided private schools and 8.3 per cent in unaided private schools.
- Girl students constitute 49.2 per cent of total student enrolment in schools in the state.

| Literacy Rate (%) |      |
|-------------------|------|
| Total             | 93.9 |
| Male              | 96.0 |
| Female            | 92.0 |

*Source:* Census 2011 (Provision Data)

| Kerala Primary Education Statistics (2009-10) |                                                                      |
|-----------------------------------------------|----------------------------------------------------------------------|
| Schools (No)                                  | Lower Primary: 6,788<br>Higher Primary: 3,040<br>High Schools: 2,814 |
| School Dropout Rate (%) (2008-09)             | Lower Primary: 0.42<br>Higher Primary: 0.40<br>High School: 1.20     |
| Pupil-Teacher Ratio                           | 26:1                                                                 |

*Source:* Economic Review of Kerala, 2010

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

→ Kerala is home to several premier institutions such as:

- Indian Institute of Management, Kozhikode
- Indian Institute of Space Science and Technology, Thiruvananthapuram
- National Institute of Technology, Calicut
- National University of Advanced Legal Studies, Kaloor
- Central Institute of Fisheries Nautical and Engineering Training, Kochi
- Central Institute of Fisheries Technology, Cochin
- Central Marine Fisheries Research Institute, Ernakulam
- Institute of Human Resource Development, Thiruvananthapuram

| Educational Infrastructure (2009-10) |        |
|--------------------------------------|--------|
| Schools                              | 12,642 |
| Universities                         | 9      |
| Engineering Institutions             | 119    |
| Arts and Science Colleges            | 190    |
| Polytechnics                         | 49     |

*Source: Economic Review of Kerala, 2010*

## Social Infrastructure – Health

- The state has good health infrastructure comprising 835 Primary Health Centres, 24 Dispensaries, 237 Community Health Centres and 5403 Sub-Centres.
- As of 2010, there were 154 Hospitals with 20,102 beds under the Directorate of Health Services.

### Health Infrastructure as of 2010

- Primary Health Centres: 835
- Community Health Centres: 237
- District/Taluk/Women and Children Hospitals: 95
- Dispensaries: 24
- T.B. Clinics/Centres: 17
- Grant-In-Aid Institutions: 29
- Leprosy Control Units: 3
- Sub-Centres: 5,403

### Health Indicators as of 2009

|                                  |      |
|----------------------------------|------|
| Beds (per 100,000 population)^   | 159  |
| Birth Rate*                      | 14.7 |
| Death Rate*                      | 6.8  |
| Infant Mortality Rate**          | 12   |
| Life Expectancy at Birth (years) |      |
| Male                             | 71.4 |
| Female                           | 76.3 |

Sources: Sample Registration System 2009,  
Economic Review of Kerala, 2010

\*Per thousand persons

\*\*Per thousand live births

^Government Hospitals, as of 2008

Source: Economic Review of Kerala, 2010

## Cultural Infrastructure ... (1/2)

- Kerala has been rated as one of the “Ten Paradises of the World” by National Geographic Traveller; it has been promoted as “God’s Own Country”.
- Health and wellness tourism in ayurvedic medicine has grown tremendously in the recent past.
- Temples in Kerala such as Guruvayoor and Sabarimala are major religious attractions.

| Popular Tourist Locations |                                                                                                                    |
|---------------------------|--------------------------------------------------------------------------------------------------------------------|
| Beaches                   | Kovalam, Varkala, Marari, Bekal and Kannur                                                                         |
| Backwaters                | Kumarakom, Alappuzha, Kollam, Kochi and Kozhikode                                                                  |
| Hill Stations             | Ponmudi, Munnar, Wyanad and Vagamon                                                                                |
| Wildlife Reserves         | Periyar Wildlife Sanctuary, Eraviikulam National Park, Thattekad Bird Sanctuary<br>Parambikulam Wildlife Sanctuary |

Source: Department of Tourism, Government of Kerala

## Cultural Infrastructure ... (2/2)

- Art and culture are being fostered and promoted through various bodies, such as, the following:
  - Kerala Sahitya Academy – to promote Malayalam literature
  - Sangeetha Nataka Academy – to promote traditional arts
  - Kerala Lalithkala Academy – to promote painters and sculptors
  - Kerala Folklore Academy – to promote Kerala folklore
  - Chalachitra Academy – academy for motion pictures
  - Kerala Kalamandalam – to teach traditional dances.
- The cities of Kerala have modern amenities for recreation such as golf courses, shopping malls, theatres, café-lounges, resto-bars, etc.

## Industrial Infrastructure

- The state has 28 SEZs with formal approvals and 20 notified SEZs. A cyber-park, spread over a 68 acre campus, is being developed in Kozhikode.

| Infrastructure         | Project Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Technopark             | <ul style="list-style-type: none"> <li>The Technopark at Thiruvananthapuram is spread over 330 acres.</li> <li>Technopark currently hosts over 180 IT and ITeS companies, together, employing over 25,000 IT professionals.</li> <li>Technopark Phase-II has been declared an SEZ by the Government of India.</li> <li>Technopark will become a 10 million sq ft technology park, once its Phase-III is complete. Technopark's Phase-III development is being implemented as an IT/ITeS SEZ, spread over 92 acres.</li> <li>As part of the Phase-IV, named Technocity, Technopark is developing 450 acres of land in Pallippuram, 5 km north from the main campus on the National Highway-47 to Kollam.</li> </ul> |
| Infopark               | <ul style="list-style-type: none"> <li>The Infopark at Kochi is best suited for ITeS due to its proximity to the submarine optical-cable landings.</li> <li>The total land available with Infopark is 100.8 acres, of which 80 acres has been notified as an SEZ by the Ministry of Commerce, Government of India.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                      |
| Special Economic Zones | <ul style="list-style-type: none"> <li>Apart from the SEZs in Technopark and Infopark, the other SEZs in Kerala include the KINFRA Electronics Park SEZ in Kalamassery; a multi-product SEZ at Kochi; two port-based SEZs at Vallapadam and Puthuvyppeen, at Kochi; a biotechnology SEZ at Kochi; a food processing SEZ near Calicut; a pulp and paper SEZ at Kottayam and a non-conventional energy sources SEZ at Kalamassery.</li> </ul>                                                                                                                                                                                                                                                                        |

## Industrial Infrastructure - Industrial Clusters ... (1/2)

| District           | Industries                                            |
|--------------------|-------------------------------------------------------|
| Kannur             | Handlooms, Powerlooms, Beedi                          |
| Alleppey           | Coir Products                                         |
| Idukki             | Agriculture and Forest-based                          |
| Thiruvananthapuram | Handlooms, IT                                         |
| Thrissur           | Powerlooms, Handlooms, Textile, Timber, Tile, Canning |
| Palakkad           | Powerlooms, Sericulture                               |
| Kollam             | Minerals and Mining                                   |
| Kozhikode          | Rubber                                                |
| Wayanad            | Minerals and Mining                                   |
| Kasargod           | Minerals and Mining                                   |
| Kottayam           | Rubber, Food Products, Engineering                    |
| Ernakulam          | IT                                                    |

## Industrial Infrastructure - Industrial Clusters ... (2/2)



| Symbol | Industries                   |
|--------|------------------------------|
|        | IT                           |
|        | Engineering                  |
|        | Minerals and Mining          |
|        | Handlooms and Powerlooms     |
|        | Textile                      |
|        | Tiles                        |
|        | Canning                      |
|        | Coir Products                |
|        | Agriculture and Forest-based |
|        | Sericulture                  |
|        | Rubber                       |
|        | Food Products                |
|        | Beedi                        |

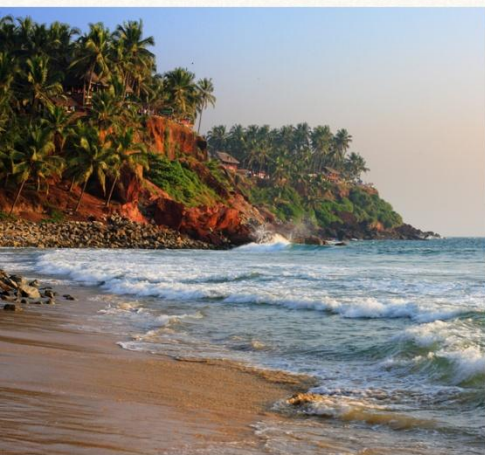
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## Key Industries

- KINFRA, KITCO Limited (formerly, Kerala Industrial and Technical Consultancy Organisation Limited), the Directorate of Industries and Commerce, and the Small Industries Development Corporation are jointly responsible for the development of industrial infrastructure in the state.
- Kerala's traditional industries include handloom, cashew, coir and handicrafts.
- In terms of industrial growth, the state's average growth from 2004-05 to 2009-10 was 16.15 per cent.
- The total number of micro, small and medium enterprises registered in Kerala was 213,740 as of March 2010. With a total investment of US\$ 1.5 billion, these units employed 831,847 people and produced goods and services worth US\$ 3.2 billion.

### Key Industries in Kerala

- Handlooms and Powerlooms
- Rubber
- Bamboo
- Coir
- Khadi and Village Industry
- Sericulture
- Seafood and Other Marine Products
- Cashew
- Beedi
- Mining
- Tourism
- Food Processing
- Spices and Spice Extracts

## Key Industries – Coir

- Kerala accounts for 95 per cent of the total coir and coir products produced in India.
- The coir industry provides employment to 0.38 million persons.
- Almost 80 per cent of the coir factories in the state are in the Alappuzha district.
- The state has three coir parks, two at Alappuzha and one at Perumon, in Kollam.
- The Coir Co-operative Marketing Federation (COIRFED) is the apex federation of 833 primary coir co-operatives societies.
- The US is the largest importer of coir products from India followed by China, the Netherlands, the U.K, Germany, Italy, Spain etc.

## Key Industries – Handloom and Powerloom

- Handloom and power-loom industry employs about 0.1 million people and ranks second among the traditional industries of the state in terms of providing employment.
- The industry is concentrated in the districts of Palakkad, Kozhikode, Thrissur, Ernakulam, Kollam and Kasaragod.
- Around 94 per cent of the total number of looms are under the cooperative sector, the rest being under industrial entrepreneurs.
- At the end of March 2010, there were 676 registered Primary Handloom Weaver's Co-operative Societies (PHWCS), consisting of 150 factory-type societies and 526 cottage-type societies.
- The overall production of cloth in the co-operative sector of Kerala was 23.9 million metres in 2009-10, valued at US\$ 34.8 million.

## Key Industries – IT ... (1/2)

- Kochi is connected by two submarine cables and satellite gateways that directly support cities including Bengaluru, has emerged as an unique IT destination.
- The state has Technopark at Thiruvananthapuram and Infopark at Kochi. A cyberpark at Kozhikode is under construction.
- The state also has many private IT parks such as Smart City-Kochi, L&T Park-Kochi, Leela Info Park-Trivandrum, Brigade Park-Kochi and Muthoot Pappachan Technopolis-Kochi.

### Some of the Key Players

- Tata Consultancy Services
- Infosys
- iGATE Patni
- RR Donnelley India Outsource Pvt Ltd

## Key Industries – IT ... (2/2)

### Tata Consultancy Services



- Tata Consultancy Services (TCS) is among the largest providers of IT and Business Process Outsourcing (BPO) services in India. TCS employed more than 198,500 IT consultants and had a revenue of US\$ 8.2 billion in 2010-11.
- TCS provides IT consulting and services in banking, financial services, healthcare and life sciences, insurance, manufacturing, media, entertainment, transportation, travel and hospitality, retail, utilities and energy resources. TCS has its software development and training centre at Technopark, in Thiruvananthapuram.

### Infosys



- Established in 1981, Infosys employs more than 130,820 people. The company has a revenue of US\$ 6.04 billion in March 2011. It is engaged in IT consulting, modular global sourcing, process re-engineering, and BPO services.
- The company has operations in Australia, China and US, and marketing and technological alliances with FileNet, IBM, Intel, Microsoft, Oracle, etc. Infosys has offices in 22 countries and development centres in India, China, Australia, UK, Canada and Japan. Infosys has a centre at Technopark, Thiruvananthapuram.

### iGATE Patni



- iGATE Patni (formerly known as Patni computers ltd) has been recently acquired by iGATE. The company provides IT solutions in financial services, manufacturing, telecom, life sciences, product engineering, energy and utilities, logistics and transportation, etc.
- The company is setting up a US\$ 32 million development centre in the Phase-III of Technopark at Thiruvananthapuram.

### RR Donnelley India Outsource Pvt Ltd



- Founded in 1995, RR Donnelley Global BPO employs 7,700 people in 28 delivery and 41 onsite operation centres across nine countries.
- It is a subsidiary of RR Donnelley (RRD) which is a global provider of integrated communications, business services and supply chain solutions. RR Donnelley is a US\$ 11 billion, Fortune 300 company with around 65,000 employees across the world. The company has an office at Technopark, Trivandrum.

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

- The self-contained Electronics Technology Park at Technopark, Trivandrum, has been instrumental in attracting global electronics manufacturers.
- The state has the availability of skilled and semi-skilled workers for the electronics industry.

### Key Players

- Traco Cable Company Limited
- Transformers and Electricals Kerala Ltd (TELK)
- Kerala State Electronics Development Corporation Ltd (Keltron)

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

### Traco Cable Co Ltd



- Traco Cable Company Limited commenced operations in 1964, manufacturing high quality cables and wires in technical collaboration with Kelesey Engineering Co, Canada. TCC currently meets the needs of public sector undertakings in India, such as, railways and the electricity boards of various states. The company has its head office at Kochi with factories at Ernakulam, Kannur and Thiruvalla.

### Transformers and Electricals Kerala Ltd (TELK)



- TELK was incorporated in 1963 under an agreement with the Government of Kerala, State Industrial Development Corporation and Hitachi Limited, Japan. TELK manufactures transformers, bushings and on-load changing gears. The factory and head office is located at Angamally, near Kochi.

### Kerala State Electronics Development Corp (Keltron)



- Founded in 1973, Keltron is a state-owned electronic enterprise, employing more than 2,000 people in 11 manufacturing locations. Keltron provides technical manpower to major organisations such as Oil and Natural Gas Corporation Limited (ONGC). Keltron also has strategic-alliances with companies such as IBM India, Acer, Degree Controls, SAB Sweden, Hitachi, ABB, Toshiba and Camille Bauer. Keltron is headquartered in Thiruvananthapuram and has training centres in 13 locations across Kerala.

## Key Industries – Tourism

- Tourism is a primary economic activity in Kerala. The sector contributes about 7.8 per cent to the GDP of the state.
- Kerala had 8.4 million tourists visiting the state during 2009.
- Kerala Tourism has won many national and international awards. The state has been voted the 'Best Asian Holiday Destination 2010' by SmartTravelAsia.com ahead of other destinations such as Bali, Phuket and Maldives.
- Some of the popular tourist destinations in Kerala include beaches of Kovalam, Varkala, Marari, Bekal and Kannur; backwaters of Kumarakom, Alappuzha, Kollam, Kochi and Kozhikode; and hill stations of Ponmudi, Munnar, Wayanad and Wagamon.
- Kerala also has a number of well known wildlife reserves, including the Periyar Wildlife Sanctuary, the Eravikulam National Park, the Thattekad Bird Sanctuary and the Parambikulam Wildlife Sanctuary.

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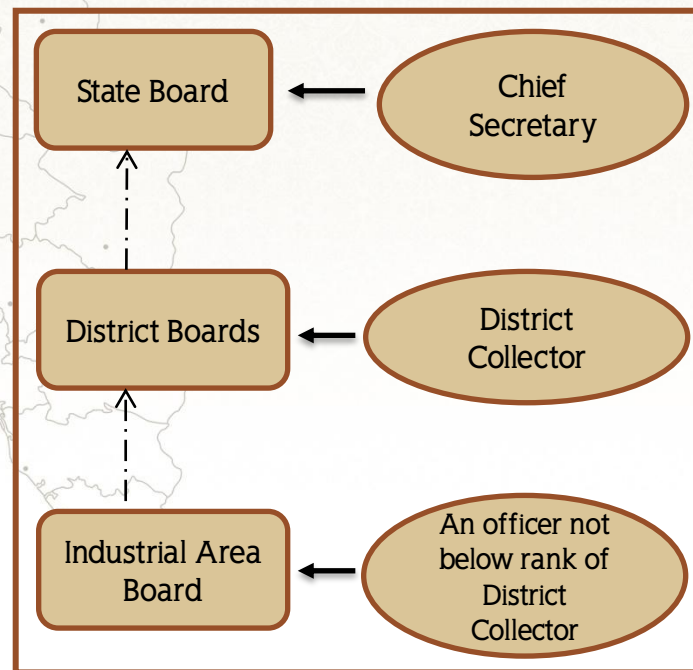
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## Three-Tier Single-Window Clearance

- A Single-Window Clearance Mechanism (SWM) was established in June 2000, with the intention of expediting clearances for new industrial projects.
- A state-level board, headed by the Chief Secretary, issues clearances within a timeframe of 45 days to medium and large scale industries.
- KSIDC is the single point of contact and convenor of the State Board.
- District-level Boards have been constituted for issuing clearances required by small scale industries.
- The District Collector of the respective district is the Chairman and General Manager of the Board; the District Industries Centre (DIC) is the convenor for such Boards.

→ Industrial Area Boards have also been set up in various industrial areas of the state for clearance of projects; an officer, not below the rank of District Collector, is the chairman of each Board, with the Designated Authority of the Industrial Area as the Convenor.

### SWM Structure in Kerala



Source: KSIDC

## Key Investment Promotion Offices ... (1/2)

| Agency                                                                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Kerala Industrial Infrastructure Development Corporation (KINFRA)                          | <ul style="list-style-type: none"> <li>The aim of the organisation is to speed up industrial growth in Kerala through infrastructure support.</li> <li>It operates industrial parks in various sectors with 313 operating units, an investment of US\$ 167 million and provides employment opportunities to over 19,000 persons.</li> <li>It has three newly operational parks – Kera Park (at Trissur), a Spices Park (at Idukki), and a Rubber Park (at Pathanamthitta).</li> <li>KINFRA's four upcoming projects include a Marine Park (at Beypore), a Technology Park (at Ramanattukara), a Food Park (at Wayanad) and an Industrial Park (at Palakkad).</li> </ul> |
| KITCO Limited (formerly, Kerala Industrial and Technical Consultancy Organisation Limited) | <ul style="list-style-type: none"> <li>The organisation is involved in providing technical consultancy assistance to banks by appraisal of projects for priority sector lending and to entrepreneurs in the Small Medium Enterprises (SMEs) sector by way of preparation of project reports &amp; market studies and by conducting training programmes for entrepreneurship development.</li> </ul>                                                                                                                                                                                                                                                                     |
| Directorate of Industries and Commerce                                                     | <ul style="list-style-type: none"> <li>It is the implementing agency for the Department of Industries, Government of Kerala.</li> <li>It provides infrastructure facilities for small scale sector by acquiring land and developing facilities such as road, water supply, electricity and civil works.</li> </ul>                                                                                                                                                                                                                                                                                                                                                      |
| Small Industries Development Corporation                                                   | <ul style="list-style-type: none"> <li>It provides infrastructure facilities for the small scale sector through its major- and mini-industrial estates.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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

| Agency                                                                                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Kerala State Industrial Development Corporation (KSIDC): the Single-Window Clearance and Monitoring Agency | <p>Purpose:</p> <ul style="list-style-type: none"> <li>Formed in 1961 with the objective of promoting, stimulating, financing and facilitating the development of large and medium scale industries in Kerala.</li> <li>Acts as a promotional agency, involved in catalysing the development of physical and social infrastructure required for the constant growth of industry.</li> </ul> <p>Composition:</p> <ul style="list-style-type: none"> <li>Consists of a group of professionals from various fields, including engineering, management, finance and law.</li> <li>Services offered include project lending, single-window clearance, equipment purchase loans and consultancies.</li> </ul> |

## Contact List

| Agency                                                            | Contact Information                                                                                                                                                  |
|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Directorate of Industries and Commerce                            | Vikas Bhavan P O Thiruvananthapuram<br>Kerala-695 033<br>Phone: 91-471-2302 774<br>Fax: 91-471-2305 493<br>E-mail: tvm_dindust@asianetindia.com                      |
| Kerala State Industrial Development Corporation Limited (KSIDC)   | T C XI/266, Keston Road, Kowdiar,<br>Thiruvananthapuram-695 003<br>Phone: 91-471-2318 922<br>Fax: 91-471-2315 893<br>E-mail: ksidc@vsnl.com                          |
| KITCO Limited                                                     | P B No 1820, Ravipuram<br>M G Road, Kochi-682 016<br>Phone: 91-484 -4129 000 / 2357 437/2357 699 / 2357 478<br>Fax: 91-484 -2357 687<br>E-mail: mail@kitco.in        |
| Kerala Industrial Infrastructure Development Corporation (KINFRA) | KINFRA HOUSE, TC 31/2312<br>Sasthamangalam, Trivandrum-695 010<br>Phone: +91-471-2726 585<br>Fax: +91-471-2724 773<br>E-mail: kinfra@vsnl.com                        |
| Small Industries Development Corporation                          | Santhinagar<br>P B No 50<br>Thiruvananthapuram- 695 001<br>Phone: 91-471-2330401, 2330 413, 2330 818,<br>Fax: 91-471- 2330 904<br>E-mail: tvm_kersidco@sancharnet.in |

## Key Approvals Required

| Approvals and Clearances Required                                          | Departments to be Consulted                                                                     | Mechanism and Estimated Time                                                                                                                                                                                                                                   |
|----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Incorporation of the Company                                               | Registrar of Companies                                                                          | <p>Single-Window Clearance:<br/>The state single-window facility clears investment proposals in 45 to 60 days on an average; the single-window mechanism helps obtain all approvals necessary for the investment proposals within the specified timeframe.</p> |
| Registration, Industrial Entrepreneurs Memorandum, Industrial Licences     | District Industries Centre for small scale industries and KSIDC for large and medium industries |                                                                                                                                                                                                                                                                |
| Allotment of Land                                                          | State Department of Industries/KSIDC/KINFRA                                                     |                                                                                                                                                                                                                                                                |
| Permission for Land Use                                                    | State Department of Industries, Kerala Town and Country Planning Department                     |                                                                                                                                                                                                                                                                |
| Environment Approval for the Site                                          | Kerala State Pollution Control Board and Central Ministry of Environment and Forests            |                                                                                                                                                                                                                                                                |
| No-Objection Certificate and Consent under Water and Pollution Control Act | Kerala State Pollution Control Board                                                            |                                                                                                                                                                                                                                                                |
| Approval of Construction Activity and Building Plan                        | Kerala Town and Country Planning Department                                                     |                                                                                                                                                                                                                                                                |
| Sanction of Power                                                          | Kerala State Electricity Board (KSEB)                                                           |                                                                                                                                                                                                                                                                |
| Registration under State's Sales Tax Act and Central and State Excise Act  | Sales Tax Department, Central and State Excise Departments                                      |                                                                                                                                                                                                                                                                |

## Cost of Doing Business in Kerala

| Cost Parameter                             | Cost Estimate                                         | Source                                                 |
|--------------------------------------------|-------------------------------------------------------|--------------------------------------------------------|
| Industrial Land (per sq m)                 | US\$ 33 to US\$ 190 (Kochi)                           | Industry Sources                                       |
| Five Star Hotel                            | US\$ 142 to US\$ 415 per room per night               | Leading Hotels in the State                            |
| Office Space Rent (per sq ft)              | US\$ 6 to US\$ 30 per month                           | Industry Sources                                       |
| Residential Space Rent (2,000 sq ft house) | US\$ 350 to US\$ 750 per month                        | Industry Sources                                       |
| Power (per kWh)                            | Commercial and Industrial: US 7 cents to US 12 cents  | Kerala State Electricity Board                         |
| Labour (minimum wages per day)             | US\$ 2.4 to US\$ 5.7                                  | Ministry of Labour and Employment, Government of India |
| Water (1,000 litres)                       | Commercial and Industrial: US 22 cents to US 55 cents | Kerala Water Authority                                 |

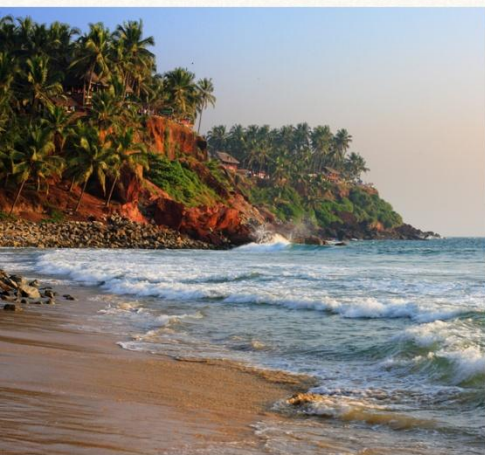
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## State Acts & Policies ... (1/2)

### SEZ Policy 2008

#### Objective

- To make Kerala's economy more export-oriented by giving various exemptions and concessions.

[Read more](#)

### IT Policy 2007

#### Objectives

- To facilitate growth of the IT sector through incentives, some of which have been in force since December 2005.
- To turn the state into a knowledge society with sustainable economic growth, social harmony and high quality of life for all.

[Read more](#)

### Industrial & Commercial Policy 2007

#### Objectives

- To make Kerala an investment-friendly destination and to achieve a high economic growth.
- To convert state into a favored destination for Manufacturing, Agro Processing, Health Services, Knowledge based Industries and Services.

[Read more](#)

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

### Kerala Biotechnology Policy 2003

#### Objective

- The policy focuses on catalysing the development and application of biotechnology while taking advantage of the state's resources and keeping global requirements in perspective.

[Read more](#)

### Labour Policy 2001

#### Objectives

- Focuses on the welfare and protection of labour to empower and improve the quality of their life.
- To provide labour market security, income security and decent working conditions for the working population.

[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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