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</tbody>
</table>
Executive summary

1 Strong economic growth
- At current prices, the total GSDP of Haryana reached Rs. 9.40 trillion (US$ 133.31 billion) in 2020-21.
- The state's GSDP increased at a Compound Annual Growth Rate (CAGR) (in Rs.) of 13.65% between 2015-16 and 2020-21.

2 Leading manufacturing hub
- Haryana is home to Maruti Udyog Ltd, India's largest passenger car manufacturer & Hero MotoCorp Ltd, world's largest manufacturer of two wheelers. Under 'Make in India' project, Manesar-Bawal Investment Region has been identified by the Government to be a manufacturing hub.

3 Leading food producer
- Haryana is the second largest contributor of food grains to India's central pool.
- The state accounted for 7.28% of India's agricultural exports in 2018-19. The state exported major agricultural products worth US$ 2,290.71 million in FY20 and US$ 1,543.43 million between April and November 2020.

4 Growing IT sector
- Haryana is the third-largest exporter of software and one of the preferred destinations for IT/ITeS facilities in India.

5 Infrastructure support
- The state has invested in the development of world class infrastructure facilities such as special economic zones (SEZs), Kundli-Manesar-Palwal (KMP) global corridor and Delhi-Mumbai Industrial Corridor (DMIC).
- Haryana enjoys a location advantage, with nearly one-third of the state's area under the National Capital Region (NCR), a prominent trade and consumption centre.
- Haryana was ranked third best state in the country ease of doing business in the Business Reforms Action Plan 2017.
INTRODUCTION
Haryana is surrounded by Uttar Pradesh in the east, Punjab in the west, Himachal Pradesh in the north and Rajasthan in the south. The state surrounds the national capital city, New Delhi, from three sides.

The most commonly spoken languages are Hindi and Haryanvi. English is the medium of education in most schools.

Gurgaon, Faridabad, Karnal, Ambala, Panipat and Kurukshetra are some of the key districts of the state.

The state has three major seasons, viz. summer (April-June), monsoon (July-September) and winter (October-March).
State Advantage

Leading business hub

- Haryana is one of the leading states in terms of industrial production, especially passenger cars, two-wheelers, mobile cranes and tractors. The Gurgaon-Manesar-Bawal belt is the auto hub of India.
- Haryana has emerged as a base for the knowledge industry, including IT & biotechnology. Many large Indian and multinational companies have set up offices in the state due to its high-quality infrastructure and proximity to Delhi.

Attractive investment avenues

- Haryana has emerged as a manufacturing hub, with immense scope for development of micro, small & medium enterprises (MSMEs) sector. The state adopted a cluster-based development approach to promote industries such as IT, textiles, food and handloom.
- The state’s real estate market is attractive and it is a preferred automotive hub. Of the total 250 large and medium OEMs, about 50 are located in Haryana.

Rich labour pool

- Haryana has a large base of skilled labour, making it an ideal destination for knowledge-based & manufacturing sectors. It also has a large pool for support services.
- The state has set up various national level institutions such as Indian Institute of Management (IIM), Indian Institute of Corporate Affairs (IICA), Central Institute for Plastics Engineering & Technology (CIPET), National Institute of Food Technology and Entrepreneurship & Management (NIFTEM).

Policy & infrastructure support

- With a stable political environment, successive Governments have been committed to creating a progressive environment.
- The state offers a wide range of fiscal & policy incentives for businesses under the Industrial & Investment Policy, 2011. It also has sector-specific policies, particularly for IT and tourism.
- It has well developed infrastructure like power, roads and railways. For trade promotion, the state has planned several projects.

Source: Ministry of Statistics and Programme Implementation, News articles
State Vision

1 ECONOMY
- Contain revenue & fiscal deficit.
- Commencement of mining & e-taxation projects would reduce revenue deficit.

2 IRRIGATION
- Manage surface water resources efficiently.
- Improve water availability by pursuing upstream storage dams.
- Implement schemes for remodelling, rehabilitate water courses, flood control.

3 AGRICULTURE
- Timely availability of quality feedstock at subsidised rates.
- Modernise irrigation systems.
- Pursue crop diversification & introduce modern technologies.

4 WELFARE
- Schemes to develop SC, BC and other vulnerable sections of society.
- Healthcare for women and children.
- Modernise police department.

5 EDUCATION
- Improve quality of education and access to schools.
- Expand college and university network.
- Enhance sports education and infrastructure to prepare people for competing at international & national events.

6 TOURISM
- Fully utilise nature’s endowment
- Create network of business and tourism facilities.

7 HOUSING
- Ensure availability of affordable housing for all.
- Provide financial assistance for construction.
- Offer loans at reasonable terms to BPL families.

8 INFRASTRUCTURE
- Develop IMTs, industrial parks & expand industrial estates
- Create E-biz portal to ensure ease of doing business.
- Address needs of MSMEs in areas of R&D and technology; develop rail connectivity to airports, etc.

Source: Government of Haryana
### Haryana in figures

#### Haryana’ Contribution to Indian Economy (2019-20)

<table>
<thead>
<tr>
<th>Category</th>
<th>India</th>
<th>Haryana</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSDP as a percentage of all states’ GSDP</td>
<td>100.00</td>
<td>3.32</td>
</tr>
<tr>
<td>GSDP growth rate** (%)</td>
<td>12.3</td>
<td>13.65</td>
</tr>
<tr>
<td>Per capita GSDP* (US$)</td>
<td>1,750.29</td>
<td>4,124.16</td>
</tr>
</tbody>
</table>

#### Haryana’ Contribution to Indian Economy (2018-19)

<table>
<thead>
<tr>
<th>Category</th>
<th>India</th>
<th>Haryana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literacy rate (%)</td>
<td>74.0</td>
<td>75.6</td>
</tr>
<tr>
<td>Birth rate (per 1,000 population) (2018)</td>
<td>20.4</td>
<td>20.7</td>
</tr>
</tbody>
</table>

#### Industrial Infrastructure

<table>
<thead>
<tr>
<th>Category</th>
<th>India</th>
<th>Haryana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational PPP projects (No.) (December 2019)</td>
<td>1824</td>
<td>28</td>
</tr>
<tr>
<td>Exporting SEZs (No.) (October 2020)</td>
<td>262</td>
<td>7</td>
</tr>
</tbody>
</table>

#### Physical Infrastructure in Haryana’

<table>
<thead>
<tr>
<th>Category</th>
<th>India</th>
<th>Haryana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installed power capacity (MW) (as of November 2020)</td>
<td>374,199.04</td>
<td>12,305.58</td>
</tr>
<tr>
<td>Wireless subscribers (million) (as of October 2020)</td>
<td>1,151.80</td>
<td>27.44</td>
</tr>
<tr>
<td>Internet subscribers (million) (as of June 20)</td>
<td>749.07</td>
<td>17.33</td>
</tr>
<tr>
<td>National highway length (km) (as of September 2019)</td>
<td>132,499.5</td>
<td>3,165.7</td>
</tr>
<tr>
<td>Major and minor ports (No)</td>
<td>13+187</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Investments (as of September 2020)

<table>
<thead>
<tr>
<th>Category</th>
<th>India</th>
<th>Haryana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cumulative FDI equity inflows between April 2000 to September 2020 (US$ billion)</td>
<td>721.783</td>
<td>90.9</td>
</tr>
</tbody>
</table>

**Note:** GSDP, per capita GSDP figures are for 2017-18 taken at current prices, Conversion rate: 64.45, For source refer to Annexure, * - Includes Pondicherry, ** - year-on-year, MW- megawatt, FDI- Foreign direct investment, MN- Million
Economic Snapshot – GSDP

GSDP of Haryana at Current Prices

- At current prices, the total GSDP of Haryana reached Rs. 9.40 trillion (US$ 133.31 billion) in 2020-21.
- The state’s GSDP increased at a Compound Annual Growth Rate (CAGR) (in Rs.) of 13.65% between 2015-16 and 2020-21.

Per Capita GSDP of Haryana at Current Prices

- The state’s per capita GSDP was Rs. 290,712 (US$ 4,124.16) in 2019-20.
- The per capita GSDP (in Rs.) increased at a CAGR of 12.23% between 2015-16 and 2019-20.

Note: exchange rates used are averages of each year, BE- Budget Estimates
At current prices, the Net State Domestic Product (NSDP) of Haryana was about Rs. 7.56 trillion (US$ 107.22 billion) in 2019-20.

The state’s NSDP (in Rs.) expanded at a CAGR of 14.09% between 2015-16 and 2019-20.

The state’s per capita NSDP reached Rs. 2,64,207 (US$ 3,748.15) in 2019-20, one of the highest across all Indian states.

Per capita NSDP (in Rs.) increased at a CAGR of 12.50% between 2015-16 and 2019-20.

Note: exchange rates used are averages of each year

The tertiary sector was the largest contributor (50.76%) to Haryana’s Gross State Value Added (GSVA) in 2019-20. The sector increased at a CAGR of 13.68% between 2011-12 and 2019-20.


Primary sectors contributed 19.86% to Haryana’s GSVA in 2019-20, which increased at a CAGR of 9.00% between 2011-12 and 2019-20.

Source: Directorate of Economics & Statistics of Haryana, MOSPI
According to the Department for Promotion of Industry and Internal Trade (DPIIT), cumulative Foreign Direct Investment (FDI) inflow in Haryana stood at US$ 90.9 billion between April 2000 and September 2020.

The services sector accounted for a major share in FDI followed by real estate & electricity.

**Note:** 1Includes Delhi, part of UP, IEM - Industrial Entrepreneurs’ Memorandum, *- till September 2020, **- till January 2020

**Source:** Department for Promotion of Industry and Internal Trade, *Minister of Industries and Commerce, Haryana
The setting up of SEZs in sectors like IT/ITeS, biotechnology, handicrafts, etc. has helped increase export from the state.


Haryana is amongst the biggest producers of food grains in India. More than 60% export of Basmati Rice from India is taking place from Haryana alone.

Basmati rice was the key export product in 2020, followed by RMG cotton and carpets.

Note: *- till November 2020
Source: DGCIS Analytics,
Physical infrastructure – Roads

- A new National Highway, NH-152D, with a length of 230 km will be constructed from Kurukshetra district to Mahendragarh district in Haryana at a cost of Rs. 5,108 crore (US$ 707.97 billion).

- As of November 2019, the state had a road network of 26,885 kms.

- Haryana is among the states having almost 100% connectivity to rural areas with metalled roads. Haryana Roadways, with its fleet of nearly 3,651 buses, is one of India’s biggest state road transport undertakings, which operate across 10.67 lakh kms everyday and carry an average of 9.49 lakh passengers every day.

- In budget 2020-21, the Haryana govt. has allocated Rs. 3,541.32 crore (US$ 502.4 million) for construction of roads and bridges

**Road Network in Haryana as of November 2019**

<table>
<thead>
<tr>
<th>Type</th>
<th>Length (kms)</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Highways</td>
<td>3,083</td>
</tr>
<tr>
<td>State Highways</td>
<td>1,491</td>
</tr>
<tr>
<td>Major District Roads</td>
<td>1,337</td>
</tr>
<tr>
<td>Other District Roads</td>
<td>20,974</td>
</tr>
</tbody>
</table>

*Source: Economic Survey of Haryana 2019-20, Ministry of Road Transport & Highways, Government of India, News articles, NHAI, Lok sabha*
Physical infrastructure – Railways

- Haryana has 1,710.49 kms long rail route. Kalka, Kurukshetra, Rohtak, Jind, Hisar, Ambala, Panipat, Gurgaon & Jakhal are some of the important railway stations. There is a railway workshop at Jagadhari.
- Government of Haryana has formed a joint venture with the Indian Railways named ‘Haryana Rail Infrastructure Development Corporation Limited (HRIDC)’ to undertake railway projects in the state.
- In September 2020, the Cabinet Committee on Economic Affairs, approved the 121-km Haryana Orbital Rail Corridor project, connecting Palwal to Sonipat. The estimated cost of the project is Rs. 5,617 crore (US$ 797 million) and it is likely to be completed in five years.

Source: Economic Survey of Haryana, State Budget 2018-19, 2017-18, Maps of India
Physical infrastructure – Airports

- There is a domestic airport at Chandigarh and civil aerodromes at Pinjore, Karnal, Hissar, Bhiwani and Narnaul. The state has a total of eight airports, which includes both operational and non-operational airports.

- In September 2015, a new terminal at Chandigarh airport was inaugurated. The terminal is capable of handling both domestic and international flights. The cost incurred in the construction of the airport by AAI is US$ 155.77 million. A stake of 51% was taken by the AAI and shares of 24.5% each were held by the state’s of Punjab and Haryana.

- Hisar civil aerodrome will be upgraded into an international airport. Under the first phase of construction, the aerodrome would be converted into a domestic airport. The airport will also be covered under the regional connectivity scheme of UDAAN. Domestic flights from the Hisar airport are expected to begin from November 2018.

- Under State Budget 2018-19, Rs. 201.27 crore (US$ 31.23 million) was allocated for civil aviation.

- Chandigarh airport handled 24,45,202 passengers and 8,939 metric tonnes of freight and saw 18,321 aircraft movements in 2019-20.

- In 2020-21*, 4,64,966 passengers travelled through the Chandigarh airport

<table>
<thead>
<tr>
<th>Domestic airport</th>
<th>Passengers</th>
<th>Aircraft movement</th>
<th>Freight (MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chandigarh</td>
<td>2,137,739</td>
<td>2,097,698</td>
<td>24,45,202</td>
</tr>
</tbody>
</table>

Note: MT - Metric tonnes, *April to November 2020
Source: Airports Authority of India
As of November 2020, Haryana had a total installed power generation capacity of 12,305.58 MW. Contribution from the private sector, state utilities and central utilities stood at 5572.92 MW, 2,929.30 MW and 3803.36 MW, respectively.

Energy requirement in Haryana was 54,505 million units in FY20.

Peak demand in the state for 2019-20 reached 11,001 MW.

Under State Budget 2019-20, Rs. 12,988.61 crore (US$ 1.86 billion) for Power Department and Rs. 475.91 crore (US$ 68 million) for Department of New and Renewable Energy.

In the state budget 2020-21, Rs. 6,360 crore (US$ 902.3 million) has been allocated for providing subsidy for rural electrification and domestic consumers.

Also, the state govt. has envisaged an expenditure of Rs. 7,559 crore (US$ 1.0 billion) on power and non-conventional energy sector in 2020-21

Note: GWH - Giga Watt Hours, MW- Megawatt, *- till November 2020
Source: Central Electricity Authority, Annual Budget 2019-20, Economic Survey of Haryana 2018-19
Physical infrastructure – Telecom

According to the Telecom Regulatory Authority of India (TRAI), Haryana had 27.44 million wireless and 292,542 wireline subscribers as of October 2020. The number of internet subscribers in the state stood at 17.33 million as of June 2020.

By October 2020, 18.63 million subscribers had submitted requests for mobile number portability in Haryana.

The state had a teledensity of 94.50% as of October 2020.

In consultation with telecom power companies, Haryana Government has rolled out a new Communication and Connectivity Policy to provide a major push to telecom and communication infrastructure in the state.

As of April 11, 2020, there were 6,188 service ready gram panchayats in the state, connected through optical fibre under the Bharat Net.

<table>
<thead>
<tr>
<th>Telecom Infrastructure (As of October 2020)</th>
<th>Performance of Bharat Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wireless subscribers</td>
<td>Optical Fiber Cable laid (up to December 02, 2018)</td>
</tr>
<tr>
<td>Wireline subscribers</td>
<td>12,013</td>
</tr>
<tr>
<td>Internet subscribers (as of June 2020) (million)</td>
<td>Service Ready GPs (as of April 11, 2020)</td>
</tr>
<tr>
<td>Tele density (%)</td>
<td>6,188</td>
</tr>
</tbody>
</table>

Wireless subscribers 27,440,345
Wireline subscribers 292,542
Internet subscribers (as of June 2020) (million) 17.33
Tele density (%) 94.50

Source: Telecom Regulatory Authority of India; Department of Telecommunications- Ministry of Communications & Information Technology, India Post

Note: GP-Gram Panchayat
The State Government has provided an impetus and would continue to the financial status of urban local bodies and provide adequate funds for improving civic amenities in urban areas. There are 77 urban local bodies in the state, consisting of 9 municipal corporations, 19 municipal councils & 50 municipal committees.

Under State-Budget 2019-20, Rs. 3,994.95 crore (US$ 571.61 million) has been allocated for urban development.

Under the State-Budget 2019-20, Government has allocated Rs. 400 crore (US$ 57.23 million) for the development of smart cities and AMRUT missions.

Swachh Bharat Mission (Urban) has been implemented in all 80 statutory towns & cities in Haryana. The state has been declared Open Defecation Free.

The state’s 20 cities & towns are included in the AMRUT Mission. As of January 2019, Rs. 2,565.74 crore (US$ 398.1 million) has been allocated to cities in Haryana under the AMRUT scheme.

In budget 2020-21, Rs. 609 crore (US$ 86.4 million) and Rs. 1,200 crore (US$ 170.2 million) have been given as grants to municipalities by the Union and State Finance Commissions, respectively.

### Smart cities in Haryana

<table>
<thead>
<tr>
<th>Cities</th>
<th>Population</th>
<th>Area (sq. km)</th>
<th>Literacy rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faridabad</td>
<td>1,809,733</td>
<td>741</td>
<td>81.70%</td>
</tr>
<tr>
<td>Karnal</td>
<td>1,505,324</td>
<td>1,967</td>
<td>74.73%</td>
</tr>
</tbody>
</table>

SOCIAL INFRASTRUCTURE
Social infrastructure – Education

The state has a strong primary education infrastructure, with a primary school located within a 1.03 km radius of each village and a middle school within a 1.07 km radius.

Under the State Budget 2019-20, Rs. 6,101 crore (US$ 872.9 million) and Rs. 3,389 crore (US$ 484.90 million) has been allocated by Government for the growth of Government primary and secondary schools.

Haryana has 9,961 primary schools, 5,528 middle schools, 3,222 high schools and 4,786 senior secondary schools in operation.

For higher education, there are 48 universities and 1038 colleges operational in the state as per All India Survey on Higher Education 2018-19.

In the 2020-21 budget, Rs 19,343 crore (US$ 2.74 billion) has been earmarked for the education, sports, arts and culture departments. Among this, Rs. 641 crore (US$ 90.9 million) has been allocated for the Sarva Shiksha Abhiyan and Rs. 340 crore (US$ 48.2 million) for the Mid-Day Meal scheme. Also, Rs. 1,766 crore (US$ 250.5 million) has been provided as capital outlay on education, sports, arts and culture.

**Higher Education Statistics (2018-19)**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universities</td>
<td>48</td>
</tr>
<tr>
<td>Colleges</td>
<td>1038</td>
</tr>
<tr>
<td>Gross Enrolment Ratio</td>
<td>28.7</td>
</tr>
<tr>
<td>Pupil teacher Ratio</td>
<td>26</td>
</tr>
</tbody>
</table>

**School Education Statistics**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Schools (Government + Private)</td>
<td>8,747 + 1,214</td>
</tr>
<tr>
<td>Middle Schools (Government + Private)</td>
<td>2,433 + 3,095</td>
</tr>
<tr>
<td>High Schools (Government + Private)</td>
<td>1,215 + 2,007</td>
</tr>
<tr>
<td>Senior Secondary Schools (Government + Private)</td>
<td>2,056 + 2,730</td>
</tr>
<tr>
<td>Pupil Teacher Ratio*</td>
<td>18</td>
</tr>
</tbody>
</table>

Note: * 2016-17

Social infrastructure – Health

According to State Budget 2019-20, for the development of hospitals and dispensaries Government has allocated Rs. 1,094 crore (US$ 156.53 million) and Rs. 995 crore (US$ 142.36 million) for primary health centres in rural areas.

Under ‘Mukhya Mantri Muft Ilaj Yojana’ seven types of medical services are being provided for free in Haryana. Further, the state Government has also decided to set up an AYUSH University as well as AYUSH Cell across every PHC of the state.

Haryana ranked first at the national level by Ministry of Health and Family Welfare (MoHFW) to earn the bonus of Rs. 71.72 crore (US$ 10.17 million) for performing outstanding services in the healthcare sector.

State govt. has allocated Rs. 6,533.75 crore (US$ 927 million) for the Health, Medical Education & Family Welfare, Ayush, ESI and Food & Drugs department in budget 2020-21. Rs. 737 crore (US$ 104.6 million) has been allocated for the National Health Mission and Rs. 278 crore (US$39.4 million) for the Ayushman Bharat scheme.

Note: ¹Per thousand persons, ²Per thousand live births,
Source: Annual Budget, Sample Registration System (SRS) Bulletin, Haryana economic survey
Historically an agrarian state, Haryana today is a well-developed industrial state. HSIIDC is the state’s premier industrial promotion agency. It is responsible for providing reliable and efficient facilities to entrepreneurs investing in the state.

HSIIDC has developed a number of industrial estates, industrial model townships and specialised parks for industrial cluster development.

As of October 2020, the state had seven exporting Special Economic Zones.

The Government is developing sector specific theme parks and sub-cities along the Kundli-Manesar-Palwal (KMP) expressway. The 135-km KMP expressway will act as a Delhi bypass and provide seamless connectivity across NH-1, NH-2, NH-8 and NH-10. Total cost of the project is US$ 414.73 million.

In budget 2020-21, the state govt. has allocated Rs. 349.3 crore (US$ 49.6 million) for industries and the commerce department.

**Mega-projects of Haryana**

- Kundli-Manesar-Palwal (KMP) Expressway on Build-Operate-Transfer (BOT) basis
- Delhi-Mumbai Industrial Corridor (DMIC) Project
- Manesar Bawal Investment Region (MBIR)
- Early Bird Projects (Global City Project, Integrated Multimodal Logistics Hub (IMLH), Mass Rapid Transit System Between Gurgaon-Manesar-Bawal (MRTS)

**Source:** Ministry of Commerce & Industry, Government of India, HSIIDC
## Industrial infrastructure… (2/3) - Industrial estates

<table>
<thead>
<tr>
<th>Estate/location</th>
<th>Brief Description</th>
</tr>
</thead>
</table>
| **IMT Manesar**  | - Located at a distance of 50 km from Delhi on NH-8 & about 32 km from the IGI Airport.  
- Focus on hi-tech and hi-precision non-polluting units such as automotive, readymade garments, ITeS and packaging.  
(Phase I is complete, Phases II, III, IV and V are undergoing development) |
| **IIDC, Saha (Status- Planned & Developed)** | - Located on NH-10, about 250 kms from New Delhi.  
- HSIIDC acquired around 76 acres of land for setting up IIDC in Saha. |
| **Udyog Vihar, Gurgaon** | - Located on NH-8, about 8 km from IGI.  
- Focus on IT/ITeS, electronics, electrical goods, pharmaceuticals, light engineering, auto parts and components and readymade garment sectors.  
- Maruti Udyog, a leading car manufacturer of India, has its base in Udyog Vihar. |
| **Kundli** | - Located on NH-1 on the Delhi-Haryana border, about 20 km from Delhi.  
- Has industrial units from general engineering, cycle parts, dairy products & agro-based sectors.  
Phases I, II, IV, EPIP and Electronic Hardware Technology Park (Status - Planned & Developed) |
| **Faridabad** | - Located about 35 km from New Delhi, on the Delhi-Mathura highway.  
- Has industrial units for the light engineering sector. |
| **Murthal** | - Located about 50 km from New Delhi, on NH-1.  
- Has industrial units from general engineering, malt, chemicals & cycle parts sectors. |
| **Panipat (Status - Fully Developed)** | - Located about 89 km from New Delhi, on NH-1.  
- It covers 922 acres of area and is a well-equipped facility with an internal road network & electric distribution system. |

Source: HSIIDC website
<table>
<thead>
<tr>
<th>Estate/location</th>
<th>Brief Description</th>
</tr>
</thead>
</table>
| **Ambala**                      | ▪ Located about 200 kms from New Delhi on NH-1.  
▪ Has industrial units from scientific instruments, electronic and light engineering sectors.  
▪ It also has a United Nations Development Programme (UNDP) assisted instrument design and development centre. |
| **Tohana (Status- Planned & Developed)** | ▪ Located about 200s km from New Delhi.  
▪ Has industrial units from agriculture implements, foundry and light engineering sectors. |
| **Jind**                        | ▪ Located about 120 kms from New Delhi.  
▪ Has agro-based industries, leather based products and chemical industries. |
| **Samalkha (Status- Planned & Developed)** | ▪ Located about 70 kms from New Delhi on NH-1.  
▪ Has light engineering and foundry units. |
| **Rai (Status- Planned & Developed)** | ▪ Located about 35 kms from New Delhi on NH-1.  
▪ A food park and a technology park have been developed here. |
| **Barwala (Phase-I Completed and Phase-II under-construction)** | ▪ Located at about 240 kms from New Delhi, Panchkula-Saha State Highway, in District Panchkula  
▪ Has industrial units of plywood, pharmaceuticals units and light engineering works. |

Other industrial estates under implementation are ancillary estates at Panchkula, Kalka, Murthal, integrated infrastructure development centre at Sirsa, built-up sheds near Sohna, and estates at Manakpur in Yamuna Nagar.

*Source: HSIIDC website*
Agriculture is one of the biggest employment generators in rural Haryana, with strong potential in value addition & exports. Haryana is self-sufficient in food production and the second largest contributor of food grains to the central pool. The Department of Horticulture encourages a cluster approach for the development of fruit cultivation. Wheat, sugarcane, rice, cotton, rapeseed and mustard are key agricultural products of the state. The state exported major agricultural products worth US$ 2,290.71 million in FY20 and US$ 1,543.43 million between April and November 2020.

Under its ‘Horticulture Vision’ the state Government aims to double the area of under horticulture from 7.5% to 15% and triple the horticulture production by 2030. The state Government has also notified the Haryana Agri-Business and Food Processing Policy 2018.

Foodgrain and horticulture production in the state reached 18.14 million tonnes and 8.65 million metric tonnes, respectively, in 2018-19.

Note: *- As per 2nd Advance Estimates, **- Targeted
### Key players

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nestle India Ltd</td>
<td>Nestle India is a subsidiary of Nestle SA, Switzerland. Its Indian headquarter is in Gurgaon, Haryana. Its famous brands in India include Nescafé, Maggi, Milkybar, Milo, Kit Kat, Bar-One, Milkmaid, Nestea, Nestle Milk, Nestle Fresh 'n' Natural Dahi and Nestle Jeera Raita. The company has a factory at Samalkha, Panipat, which was commissioned in 1993, to manufacture milk products.</td>
</tr>
<tr>
<td>GlaxoSmithKline Consumer Healthcare Ltd (GSK)</td>
<td>GlaxoSmithKline Consumer Healthcare Ltd (GSKCH) is an Indian group company/associate of GlaxoSmithKline UK and one of the largest players in the health food and drink industry in India. GSK has a factory at village Khewra, Sonipat, with a capacity of 26,100 tonnes per annum for its brand Horlicks.</td>
</tr>
<tr>
<td>Haldiram’s Foods International Ltd</td>
<td>Haldiram’s started in Bikaner and is one of India’s largest sweets and snacks manufacturers. The company sells packaged food and snacks, which are not only consumed in domestic markets but also exported to various countries viz., Pakistan, Canada, Australia, Sri Lanka, Singapore, Malaysia, South Africa, Indonesia, Qatar, Hong Kong, Japan, Kenya, Libya and South Korea. Haldiram’s also has its own outlets where it sells sweets and eatables. In Haryana, Haldiram Manufacturing Co Pvt Ltd is located in village Kherki Daula on the Delhi-Jaipur highway.</td>
</tr>
<tr>
<td>PepsiCo India</td>
<td>PepsiCo established its business operations in India in 1989. The company has a diverse range of products including carbonated drinks and potato chips. It employs 6,400 people and provides indirect employment to almost 200,000 people. It has 38 beverage bottling plants and three food plants in the country. Its corporate office is in Gurugram.</td>
</tr>
</tbody>
</table>
Haryana is a preferred destination for auto majors and auto-component manufacturers. The state is host to many large automotive players.

The state produces two-thirds of passenger cars, 50% of tractors and 60% of motorcycles manufactured in the country.

A significant % of the state’s workforce is engaged in the automotive industry; Gurgaon & Faridabad are important automobile centres.

The International Centre for Automotive Technology (ICAT) has been set up at Manesar as a part of the National Automotive Testing & Research & Development (R&D) Infrastructure Project (NATRiP). It provides testing and R&D services to the industry.

Automobiles and auto component exports from Haryana were about US$ 1.070.81 million in FY20 and have reached US$ 515.3 million in FY21 (until November 2020).

Source: NSDC & KPMG - Human Resources and Skill Requirements in Auto and Auto Components Sector, DGCIS Analytics
Key sector – Automobiles… (2/2)

Key players

Maruti Suzuki India Ltd
- Maruti Suzuki India had a market share of around 40 cent in the Indian passenger car market at the end of March 2012. Its Gurgaon facility has three integrated plants, with an installed capacity of around 900,000 units; the fourth plant is located at Manesar. The Gurgaon plant would eventually serve as a base for engine assembly and machining, while automobile assembly is done at the Manesar plant.
- The company had a 49.8% share in the Indian passenger car market during April-August 2019. The company recorded sale of 1,563,297 units in FY20.
- In May 2020, it commissioned a 5 megawatt (MW) solar power plant at Gurugram.

Escorts Group
- Escorts is a leading engineering conglomerate in the high growth sectors of agri-machinery, construction and material handling equipment, railway equipment and auto components. Its corporate headquarters and manufacturing facilities for tractor assembly, transmission and engines, crankshaft and hydraulics is located in Faridabad.

Yamaha Motor Pvt Ltd
- Yamaha Motors is a 100% subsidiary of Yamaha Motor Company Ltd, Japan. The company has more than 2,000 employees in India, and a countrywide network of over 400 dealers. It has a manufacturing plant in Faridabad, which supplies bikes to the domestic as well as overseas market.
Gurugram has emerged as a preferred destination for the IT industry in North India. As per Haryana’s economic survey 2017-18, license was granted to 49 IT parks. As of October 2020, seven IT/ITeS SEZs were operational in the state.

Haryana is among the leading states in terms of IT export. Export of electric machinery and equipment for Haryana reached US$ 379.3 million in FY20 and US$ 254.4 million in FY21 (until November 2020).

The state Government has notified following policies for creating an ecosystem to take Haryana on the path of digital revolution:

- IT & ESDM Policy 2017
- Entrepreneur & Start up Policy 2017
- Communication & Connectivity Infrastructure Policy 2017
- Cyber Security Policy 2017

**Note:** ESDM - Electronics System Design & Manufacturing, *- till November 2020

**Source:** Haryana Economic Survey 2017-18, State Budget 2018-19, Government of Haryana, DGCIS Analytics
**Key Sector – IT & ESDM… (2/2)**

<table>
<thead>
<tr>
<th>Key players</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM Global Process</td>
<td>IBM Global Process Services (formerly IBM Daksh) is a leading provider of business process solutions, with its corporate office in Gurgaon. The company has 23 service delivery centres at nine locations in India and Philippines and employs more than 100,000 persons, making it one of the largest Business Process Outsourcing (BPO) vendors in India in terms of headcount. Haryana was awarded the software centre of excellence by IBM.</td>
</tr>
<tr>
<td>Services (TCS)</td>
<td>TCS is among the largest providers of IT and BPO services in India. The company’s clients are in BFSI, healthcare &amp; life sciences, insurance, manufacturing, media, entertainment, transportation, travel &amp; hospitality, retail, utilities and energy resources sectors. It commenced operations in Gurgaon in 1995.</td>
</tr>
<tr>
<td>Microsoft Corporation</td>
<td>Microsoft entered India in 1990 and works closely with the Indian Government, IT industry, academia and the local developer community. In India, Microsoft employs about 5,800 people and has six business units representing the complete Microsoft product lifecycle. The company has two offices in Haryana, both at Gurgaon.</td>
</tr>
<tr>
<td>Google</td>
<td>Google, a web based search engine, is the flagship product owned by Google, Inc. It offers special features such as synonyms, weather forecasts, time zones, stock quotes, maps, earthquake data, movie-show times, airports, home listings and sports scores. Google has a sales office in Gurgaon. It is a direct sales organisation and helps the world's biggest advertisers to enjoy immediate and accountable communication with the consumer. The sales teams here are structured according to industry verticals.</td>
</tr>
</tbody>
</table>
Haryana is the fourth largest producer of cotton in India and contributes around 6% of the country’s total production. Easy availability of raw material provides the state with competitive advantage in the textiles sector, which provides employment to around one million people in Haryana.

Districts such as Panipat, Gurugram, Faridabad, Hisar and Sonepat have developed into robust textile centers in Haryana.

Readymade cotton garments are one of the major exports from Haryana. Exports reached US$ 834.87 million in FY19 and US$ 310.8 million in FY21 (until November 2020).

The state Government also notified a new Textile Policy 2018 to promote the development of the sector in the state.

Note: *including accessories, **- till November 2020, ^- Targeted
Source: Economic Survey of Haryana, DGCIS Analytics, Haryana Textile Policy 2018, Invest India, Agriculture Department of Haryana
Single–window clearance mechanism

- Single-window clearance mechanism was established under the Haryana Industrial Promotion Act, 2005. It has a three-tier structure to grant exemption/relaxation from any of the provisions/rules of the Act.
- The Investment Promotion Centres (IPC) located in New Delhi and Chandigarh and District Industries Centres (DIC) at the district level serve as nodal agencies and provide support to the committees.
## Key investment promotion offices

<table>
<thead>
<tr>
<th>Agency</th>
<th>Description</th>
</tr>
</thead>
</table>
| Haryana State Industrial and Infrastructure Development Corporation Ltd (HSIIDC) | - Focusses on the development of medium- and large-scale industries.  
- Provides financial assistance by way of term loans, equipment re-finance, equipment leasing and working capital. |
| Haryana Agro Industries Corporation Ltd (HAIC)              | - Engaged in trading activities such as sale of seeds, fertilisers, pesticides, tractors and other agricultural machinery at economical prices to the farming community.                                         |
| Haryana State Electronics Development Corporation Ltd (HARTRON) | - Nodal agency of the Government of Haryana for promoting electronics and IT industries.  
- It offers expertise in infrastructure development as well as promotion of projects. |
<p>| Haryana Urban Development Authority (HUDA)                  | - Responsible for promoting and securing development of urban areas; activities include land acquisition, development and sale of property for residential, industrial and commercial purposes. |
| Haryana Finance Corporation (HFC)                           | - Meets the credit needs of small- and medium-scale industrial units by advancing term loans.                                                                                                                  |</p>
<table>
<thead>
<tr>
<th>Agency</th>
<th>Contact information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haryana State Industrial and Infrastructure Development Corporation Ltd (HSIIDC)</td>
<td>Plot No C-13-14, Sector 6, Panchkula-134109 Phone: 91-172-2590 481 Fax: 91-172-2590 474 E-mail: <a href="mailto:info@hsiidc.org">info@hsiidc.org</a> Website: <a href="http://www.hsiidc.org">www.hsiidc.org</a></td>
</tr>
<tr>
<td>Haryana Urban Development Authority (HUDA)</td>
<td>C-3, Sector-6, Panchkula Phone: 91-172-2567 857 E-mail: <a href="mailto:huda@hry.nic.in">huda@hry.nic.in</a> Website: <a href="http://www.huda.gov.in">www.huda.gov.in</a></td>
</tr>
<tr>
<td>Haryana Finance Corporation (HFC)</td>
<td>Bays 17-18-19, Sector 17-A, Chandigarh-160017 Phone: 91-172-2702 755-57 Fax: 91-172-2702 666 E-mail: <a href="mailto:mdhfc@airtelmail.in">mdhfc@airtelmail.in</a> Website: <a href="http://www.hfcindia.org">www.hfcindia.org</a></td>
</tr>
<tr>
<td>Haryana State Electronics Development Corporation Ltd (HARTRON)</td>
<td>SCO-109-110, Sector 17-B, Chandigarh -160017 E-mail: <a href="mailto:hartron@hartron.org">hartron@hartron.org</a> Website: <a href="http://www.hartron.org.in">www.hartron.org.in</a></td>
</tr>
</tbody>
</table>
## Key approvals required

<table>
<thead>
<tr>
<th>Approvals and clearances required</th>
<th>Department</th>
<th>Estimated time</th>
</tr>
</thead>
</table>
| Site clearances and No-objection Certificate                          | Department of Environment/Haryana Pollution Control Board | Site and/or environment clearance: 60 days  
No-objection certificate to establish: 7 days  
No-objection certificate to operate: 30 days  
Renewal of consent: 21 days |
| Approval, No-objection Certificate and change of industrial land      | Department of Town and Country Planning          | Change of land use in industrial zone: 30 days  
No objection certificate for establishment of industrial unit under the Urban Area Act: 15 days  
Approval of building plan: 30 days |
| Approval and licence                                                  | Labour Department/ Chief Inspector of Factories  | Approval of factory plan under the Factories Act, 1948 (Act 63 of 1948): 90 days  
Licence for running factory: 15 days |
| Release of power connection                                          | Uttar Haryana Bijli Vitran Nigam/Dakshin Haryana Bijli Vitran Nigam | Load up to 20 KW: 21 days  
Load up to 70 KW: 45 days  
Load above 250 KW: 60 days  
Load above 1 MW: 60 days |
| Sales tax                                                            | Excise and Taxation                              | Sales tax registration: 15 days |
## Cost of doing business in Haryana

<table>
<thead>
<tr>
<th>Cost parameter</th>
<th>Cost estimate</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial land (per sq m)</td>
<td>US$ 28.7-67</td>
<td>Industry sources</td>
</tr>
<tr>
<td>Office space rent (per sq ft)</td>
<td>Gurgaon: US 31 cents to US 74 cents per month</td>
<td>Industry sources</td>
</tr>
<tr>
<td>Residential rent (2,000 sq ft)</td>
<td>US$ 287 to US$ 478 per month</td>
<td>Industry sources</td>
</tr>
<tr>
<td>Five-star hotel room rent</td>
<td>US$ 80.4 per room per night</td>
<td>Leading hotels in the state</td>
</tr>
<tr>
<td>Power (per kWh)</td>
<td>Commercial &amp; Industrial: US 9.6 cents</td>
<td>Industry sources</td>
</tr>
<tr>
<td>Water (per 1,000 litres)</td>
<td>Commercial &amp; Industrial: US 9.6 cents</td>
<td>Water Supply and Sanitation Department</td>
</tr>
</tbody>
</table>

- As per the World Bank and Department of Industrial Policy and Promotion (DIPP) report - Assessment of State Implementation of Business Reforms 2017, the state ranked 3rd in the Ease of Doing Business Index.
## State acts and policies ...(1/2)

<table>
<thead>
<tr>
<th>Policy Name</th>
<th>Objectives</th>
</tr>
</thead>
</table>
| **Haryana Enterprises and Employment Policy 2020** | - Establish the state as a competitive and favoured investment destination  
- Attract investment of over Rs 1 lakh crore and generate 5 lakh jobs in the state                                                                 |
| **Haryana Agri-Business And Food Processing Policy 2018** | - Make the state a preferred investment destination for food processing sector  
- Promote start-ups in agri-business space in Haryana  
- Increase farmers’ income through new agro-marketing reforms                                                                 |
| **Textile Policy 2019**                         | - To generate 50,000 new jobs in the textile sector  
- To boost textile export by CAGR of 20% during the policy period  
- To achieve balanced regional growth especially promoting growth in the regions that are lagging in development |
| **IT & ESDM Policy 2017**                       | - Attract US$ 2.79 billion as investments in IT & EDSM sector in the next five years  
- Provide employment to 120,000 people in the sector.  
- Increase IT & EDSM sector’s contribution to the state’s GDP from 9.4% to 15%.                                                                 |
| **Aerospace and Defence Policy 2016**           | - Attract orders for at least 15% of all offset obligations discharged by companies in India by leveraging the existing ancillary base and promoting new MSMEs dedicatedly for A&D sector  
- To attract investment of over Rs. 25,000 crore (US$ 3.55 billion) throughout the value-chain including research, design, development, manufacturing, maintenance, quality control and training |

[Read more](#) [Read more](#) [Read more](#) [Read more](#)
State acts and policies ...(1/2)

1. **Haryana Enterprises and Employment Policy 2020**
   - Establish the state as a competitive and favoured investment destination
   - Attract investment of over Rs 1 lakh crore and generate 5 lakh jobs in the state

2. **Haryana Agri-Business And Food Processing Policy 2018**
   - Make the state a preferred investment destination for food processing sector
   - Promote start-ups in agri-business space in Haryana
   - Increase farmers’ income through new agro-marketing reforms

3. **Textile Policy 2019**
   - To generate 50,000 new jobs in the textile sector
   - To boost textile export by CAGR of 20% during the policy period
   - To achieve balanced regional growth in the regions that are lagging in development

4. **IT & ESDM Policy 2017**
   - Attract US$ 2.79 billion as investments in IT & EDSM sector in the next five years
   - Provide employment to 120,000 people in the sector.
   - Increase IT & EDSM sector’s contribution to the state’s GDP from 9.4% to 15%.

5. **Aerospace and Defence Policy 2016**
   - Attract orders for at least 15% of all offset obligations discharged by companies in India by leveraging the existing ancillary base and promoting new MSMEs dedicatedly for A&D sector
   - To attract investment of over Rs. 25,000 crore (US$ 3.55 billion) throughout the value-chain including research, design, development, manufacturing, maintenance, quality control and training
### State acts and policies ...(1/2)

<table>
<thead>
<tr>
<th>No.</th>
<th>Policy Title</th>
<th>Details</th>
</tr>
</thead>
</table>
| 6   | Haryana Sports and Physical Fitness Policy 2015       | - The policy aims at two themes, namely - Sports for All and Excellence in Sports  
- The policy covers five major goals such as - introduction to sports, recreational sports, competitive sports, high performance sports and sports for development. |
| 7   | Enterprise Promotion Policy, 2015                     | - The major objectives of this policy is to facilitate ease of doing business in the state, reduction in cost of doing business in order to attract more number of players, and have an increased focus on MSMEs |
| 8   | New Integrated Licensing Policy (NILP) 2015            | - To develop hyper & high potential urban complexes in the state  
- To allow real estate developers in setting up projects that are less than 100 acres of area |
| 9   | Industrial and Investment Policy 2011                  | - To achieve higher, sustainable and inclusive economic growth by attracting investments in a focussed and structured manner in potential areas.  
- Encourage private sector investment and promote the manufacturing sector |
| 10  | Rehabilitation and Resettlement Policy, 2010          | - To smoothen out the land acquisition process under the Land Pooling Scheme.  
- To make fair payment of market value as compensation for land to land owners. |
Startup policy 2017

- The policy visualises Haryana as a resourceful and innovative startup hub by supporting & assisting the new-age innovators and entrepreneurial talents across the state.

- Objectives:
  - Attract investments into the incubation and startup ecosystem in Haryana during policy period
  - Establish at least 10 technology /business incubators / accelerators in each of the different sectors in the state in different regions of the state
  - Develop 1 million sq. ft. of incubation space
  - Encourage/facilitate/incubate at least 500 startups

- Haryana State Electronic Development Corporation Limited (HARTRON) introduced a start-up warehouse on 10,000 sq. ft. of land in Gurugram under the policy.

- The policy also proposed building of sector specific incubation centers which would provide facilities such as common working space, test and demonstration facilities, mediation and network, training and coaching and business support.

- Various incentives are offered to startups/entrepreneurs under the policy. Few of these are interest subsidy, lease rental subsidy and innovation promotion subsidy.

- The Government also decided to create a fund of funds to support startups at the stages of seed funding and venture capital.
  - Seed capital of upto US$ 4,656 shall be provided for validation of idea, prototype development and initial activities to setup the startup. A total of 500 ideas would be supported with seed capital.
  - The Government would also create a fund of US$ 1.5 million dedicated to meet the funding requirement for scalability.
## Sources

<table>
<thead>
<tr>
<th>Data</th>
<th>Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSDP (state)</td>
<td>Economic Survey</td>
</tr>
<tr>
<td>Per capita GSDP figures</td>
<td>Central Statistics Office</td>
</tr>
<tr>
<td>GSDP (India)</td>
<td>Central Statistics Office</td>
</tr>
<tr>
<td>Installed power capacity (MW)</td>
<td>Central Electricity Authority</td>
</tr>
<tr>
<td>Wireless subscribers (No)</td>
<td>Telecom Regulatory Authority of India</td>
</tr>
<tr>
<td>Internet subscribers (million)</td>
<td>Telecom Regulatory Authority of India</td>
</tr>
<tr>
<td>National highway length (km)</td>
<td>NHAI, Roads and Building Department-Government of India</td>
</tr>
<tr>
<td>Airports (No)</td>
<td>Airports Authority of India</td>
</tr>
<tr>
<td>Literacy rate (%)</td>
<td>Census 2011</td>
</tr>
<tr>
<td>Birth rate (per 1,000 population)</td>
<td>SRS Bulletin September 2017</td>
</tr>
<tr>
<td>Cumulative FDI equity inflows (US$ billion)</td>
<td>Department for Promotion of Industry and Internal Trade</td>
</tr>
<tr>
<td>Operational PPP projects (No)</td>
<td>DEA, Ministry of Finance, Government of India</td>
</tr>
<tr>
<td>Operational SEZs (No)</td>
<td>Notified as of December 2017, Ministry of Commerce &amp; Industry, Department of Commerce</td>
</tr>
</tbody>
</table>
## Exchange rates

<table>
<thead>
<tr>
<th>Year</th>
<th>Rs. Equivalent of one US$</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004-05</td>
<td>44.95</td>
</tr>
<tr>
<td>2005-06</td>
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<td>2012-13</td>
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<td>2018-19</td>
<td>69.89</td>
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<tr>
<td>2019-20</td>
<td>70.49</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Rs. Equivalent of one US$</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>44.11</td>
</tr>
<tr>
<td>2006</td>
<td>45.33</td>
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<td>2010</td>
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<td>2011</td>
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<td>2012</td>
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<tr>
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<tr>
<td>2018</td>
<td>68.36</td>
</tr>
<tr>
<td>2019</td>
<td>69.89</td>
</tr>
</tbody>
</table>

*Source: Reserve Bank of India, Average for the year*
India Brand Equity Foundation (IBEF) engaged Sutherland Global Services private Limited to prepare/update this presentation.

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