

About Invest India

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

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

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

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

The firm is one of the most awarded Investment Promotion Agency in the world, and has won the Best Investment Project Award three years in a row (2016, 2017 and 2018) at the Annual Investment Meeting (AIM) organized by the Ministry of Economy, UAE. Invest India also won the prestigious The UNCTAD Award 2018 for promoting investment in sustainable development, the UNCTAD Investment Promotion Award 2016 for excellence in partnering for investment promotion, and the Investment Award 2016 from the Indian Ocean Rim Association, among others.

Please learn more about Invest India at
<https://www.investindia.gov.in/>

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About JLL

JLL (NYSE: JLL) is a leading professional services firm that specialises in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of \$16.3 billion, operations in over 80 countries and a global workforce of over 90,000 as of December 31, 2018. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit jll.com

About JLL India

JLL is India's premier and largest professional services firm specialising in real estate. With an audited revenue of 4,134 crores for FY 2018-19, the Firm is growing from strength to strength in India for the past two decades. JLL India has an extensive presence across 10 major cities (Mumbai, Delhi NCR, Bengaluru, Pune, Chennai, Hyderabad, Kolkata, Ahmedabad, Kochi and Coimbatore) and over 130 tier II & III markets with a cumulative strength of close to 12,000 professionals.

The Firm provides investors, developers, local corporates and multinational companies with a comprehensive range of services. This includes leasing, capital markets, research & advisory, transaction management, project development, facility management and property & asset management. These services cover various asset classes such as commercial, residential, industrial, retail, warehouse and logistics, hospitality, healthcare, senior living, data centre and education.

JLL India won the Five Star Award for 'Best Property Consultancy at the International Property Awards Asia Pacific 2018 -19. The Firm was also recognised amongst the 'Top 100 Best Places to Work in India' three years in a row (2017, 2018 and 2019) in the annual survey conducted by Great Place to Work® and The Economic Times. It has also been acknowledged as 'Property Consultant of the Decade' at the 10th CNBC-Awaaz Real Estate Awards 2015. For further information, please visit jll.co.in

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Hyderabad

Fostering new innovations
in manufacturing sector



Hyderabad has emerged as the second silicon valley of India and is often referred to as Cyberabad. The region is a significant contributor to the IT, pharma, bio-tech, medical devices, aerospace, defence and ESDM sectors.

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Commissionerate of Industries



Industries & Commerce Department



Telangana State Industrial Infrastructure Corporation (TSIIC)

Quli Qutb Shahi Tombs, Hyderabad

STATE SNAPSHOT



GSDP Growth Rate (FY18):
10.2%



HDI Rank (2018):
9th Rank



Logistic Performance Index (2019): **8th Rank**



12th Rank; INR 210 bn
IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY 18):
15,263; 6th Rank



State's contribution to India's Exports (FY19): **10th Rank, 6.4%**

Note: Excludes Union Territories

Telangana contributes:



50% of India's **bulk drugs exports**



10% of global **generics drugs** volume



Telangana State Industrial Project Approval and Self-Certification System (TS-iPASS)

Speedy processing of applications for various clearances for setting up of industries at a single point

- Definitive timeframe (ranging from 1 - 30 days)
- Penalties on government officers for any delays in granting approvals

Policy & Institutional Support – Proactive government

- Telangana ICT Policy, 2016
- Telangana Electronics Policy, 2016
- Telangana Innovation Policy, 2016
- Exclusive Data Center policy (**first in India**)
- IMAGE Policy, 2016 (Animation & Gaming)
- IoT Policy 2017
- Block-chain Policy (draft stage) (**first in India**)
- Drone Policy 2019 (**first in India**)
- of India, and is a node on the Chennai – Bengaluru Industrial Corridor

WHY HYDERABAD?

Central Location: A key to access large hinterland

1/3rd of global **vaccine** production

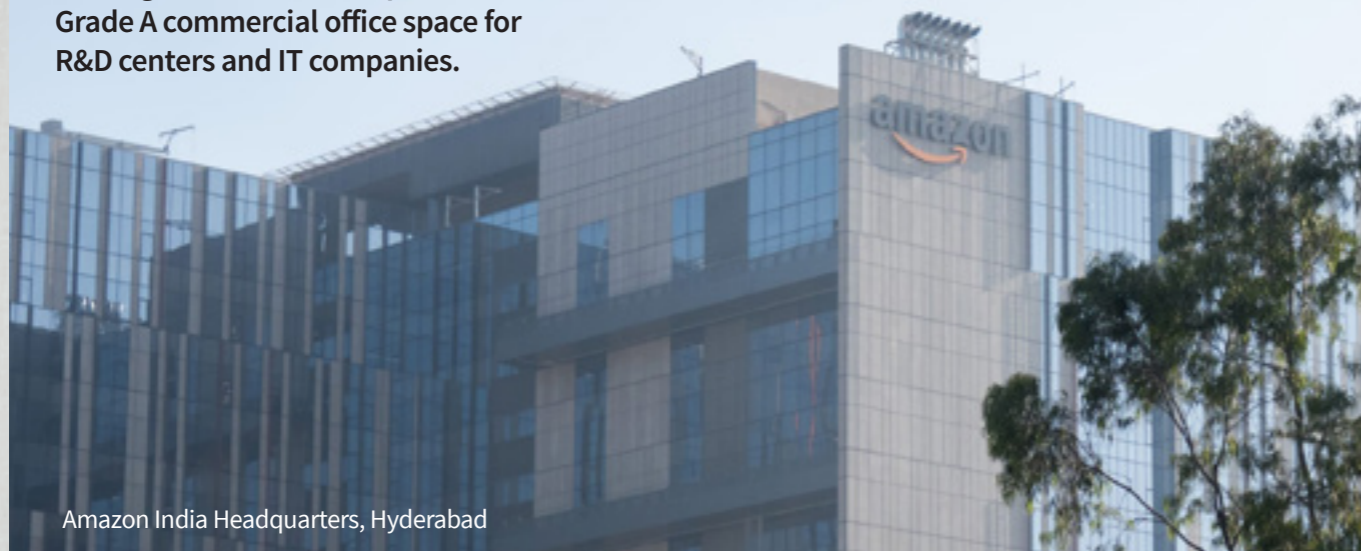
2/5th of domestic **pharma production**

16% of India's **software exports**

1/5th of national **defence production**

53 IT SEZs
Largest cluster of IT SEZs
in the country

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



Amazon India Headquarters, Hyderabad

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

Skilled labor pool:

18 ITIs (vocational training centers) in the Hyderabad Metropolitan

Region (HMR) and its vicinity.

Source: Dept. of Employment & Training, Govt. of Telangana

SECTOR SNAPSHOT

 Pharma & Lifesciences Genome Valley (Genome Valley 2.0 planned) India's first and largest R&D and biotech cluster. Includes Life sciences focused incubators and multi-tenanted lab space	 Aerospace & Defence Adibhatla Aerospace SEZ & GMR Aerospace Park India's only multi-product SEZ near an airport, along with domestic tariff area	 Hardware & ESDM NIMZ & Fab City – E-City Dedicated manufacturing zones for ESDM	 IT & ITes Established and expanding cluster aroundHITEC City and Gachibowli	 Innovation as a Driver T-HUB : India's largest technology incubator. It is a first-of-its-kind PPP, incorporated in 2015: -457 start-ups incubated till Jan 2019 T-Works : India's largest prototyping center for ESDM hardware and mechanical start-ups; launched in 2019 B-HUB (Biotech Hub) : Announced in 2018, a scaled-up manufacturing facility for biopharma R&D companies, with a turnkey incubator
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- **Pharma City (upcoming)** – World's largest integrated industrial cluster for pharmaceuticals
- **Bharat Biotech** – World's first company to file a Zika virus vaccine candidate patent

Niche focus: High-skill and superior technology manufacturing sectors:

- Drone technology
- Nano-sciences
- Artificial intelligence
- Self-driven car technology

Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acers)	Major Occupiers	Remarks
Kakatiya Mega Textile Park	1,190	Upcoming	Biggest textile park in India. Envisioned for an integrated value chain concept of "fibre to fabric" facility. Korean company Youngone is the anchor investor.
Hyderabad Pharmacy	19,333	Upcoming	Proposed integrated development with objective is to set up the entire value chain of the pharmaceutical industry.
EMC ECity	603	Upcoming	Greenfield electronics manufacturing cluster.
EMC Maheshwaram	302		
IKP Knowledge Park	200	Laurus, USP, Du Pont, Adama, Escientia Biopharma, Sai Life Sciences, Biological E	Part of Genome Valley, India's first organized R&D cluster.
MN Park	400	TCI-Tokyo Chemicals, Mylan, Novartis, GSK, Alembic	India's first Industrial Park to offer turn-key fully fitted lab & office spaces.
Medical Devices Park, Sultanpur	250	Apollo Hospitals, Cyient, Sahajanand Medical Technologies	Private Industrial Park for engineering, food processing, automotive, logistics and aerospace developed with Sumitomo Corporation.
GMR Aerospace Park	5,500	Citron, Cyient, Safran	Automobiles, Electronics and Float Glass.
Adibhatla Aerospace SEZ	337.8	TATA Advanced Systems Limited, JV units with Lockheed Martin, Sikorsky & GE	Focus greenfield industrial area for ESDM.
Zaheerabad NIMZ**	12,635	Upcoming	Automotive & auto ancillary cluster.

The major industrial clusters can be identified as Kompally – Medchal, Shamshabad, Cherlapally – Uppal – Nagole and Patancheru – Balanagar. The land rates in these corridors range between INR 3,700 to INR 19,800 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

SL. ProjectName

LIFE SCIENCE ZONE

- 1 DuPont
- 2 Escientia Lifesciences
- 3 US Pharmacopeia
- 4 Adama
- 5 Laurus Labs r & D Center
- 6 Laxai Life Sciences
- 7 Sai Lifesciences
- 8 GSK Consumer Healthcare
- 9 B Hub

TRADITIONAL PHARMA ZONE

- 10 Hi tech Pharmaceuticals
- 11 Mylan Laboratories Ltd.
- 12 Transgene Biotek
- 13 Gland Pharma
- 14 Hyderabad Ammonia & Chemicals Pvt
- 15 Dr. Reddy's Laboratories
- 21 Aurobindo Pharma
- 22 Hyderabad Chemical Pvt Ltd
- 23 Daewoong Pharmaceutical
- 35 Lucid Laboratories Pvt Ltd.

AEROSPACE, DEFENCE AND ESDM ZONE

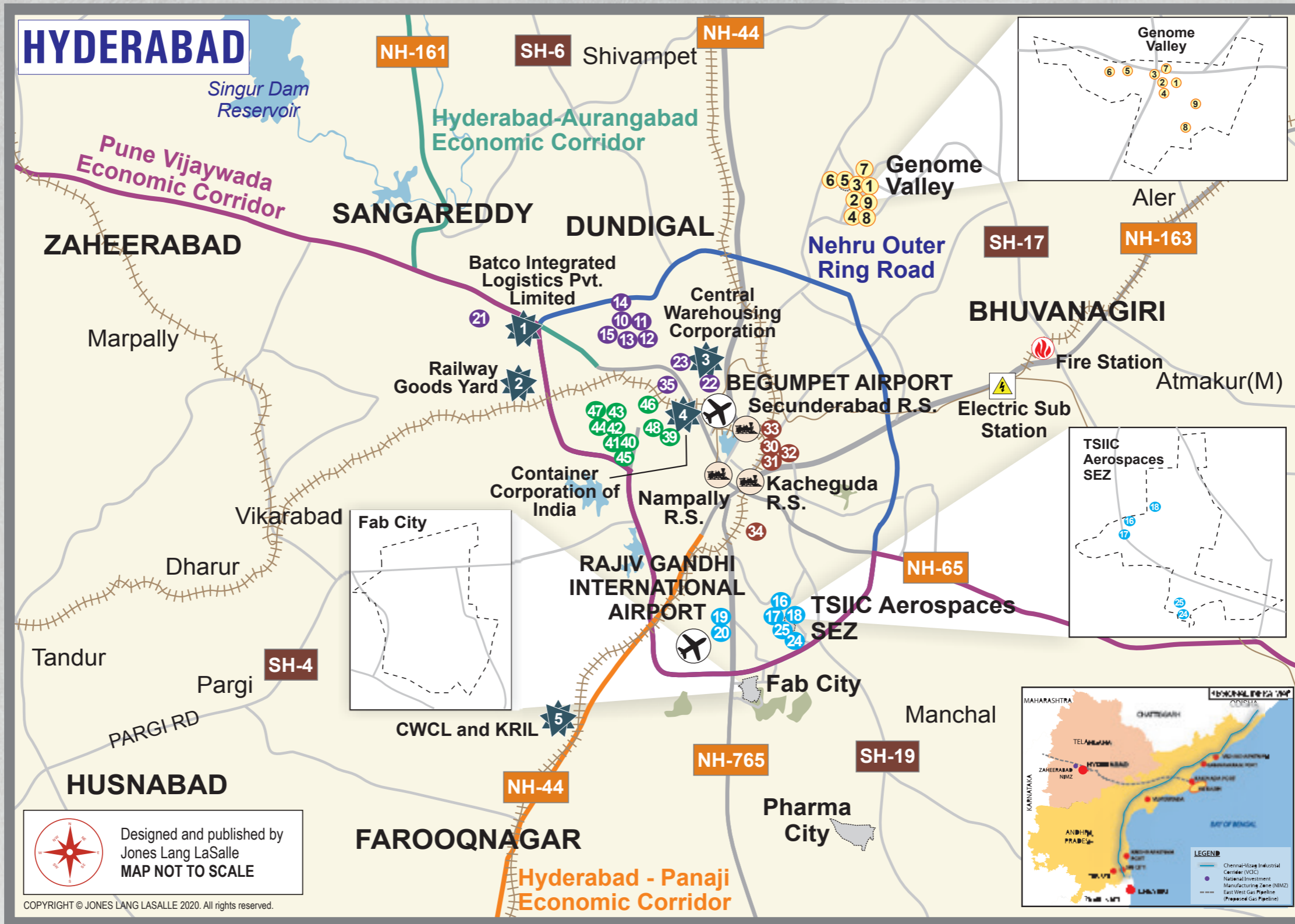
- 16 Tata Boeing Aerospace Ltd.
- 17 Tata Advanced Systems
- 18 Nucon Aerospace Pvt Ltd.
- 19 Tata Teleservices
- 20 ESDM (C-DAC)
- 24 Tata Lockheed Martin Aerostructures Ltd.
- 25 Tata Sikorsky Aerospace Limited

ICD & CFS

- 26 Central Warehousing Corporation
- 27 Container Corporation of India
- 28 CWCL and KRIL
- 29 Batco Integrated Logistics Pvt. Ltd.
- 38 Railway Goods Yard

KNOWLEDGE ZONE

- 30 CSIR – Indian Institute of Chemical Technology
- 31 CSIR – National Geophysical Research Insitute
- 32 CSIR – Centre for Cellular & Molecular Biology
- 33 National Institute of Nutrition
- 34 Central Research Institute for Dryland Agriculture



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- Nehru Outer Ring Road
- Pune Vijaywada Economic Corridor
- Hyderabad – Aurangabad Economic Corridor
- Hyderabad – Panaji Economic Corridor

“ Bharat Biotech is the youngest Indian vaccine manufacturer of multiple human vaccines. Hyderabad is close to the centre of India & easily accessible. The city has eminent scientific institutions such as Center for Cellular & Molecular Biology, Indian Institute of Chemical Technology, Jawaharlal Nehru Technological University, Osmania University, Central University of Hyderabad, three other vaccine manufacturing companies, Hub for Bulk Drugs & highly ranked pharmaceutical formulation & filling companies & cosmopolitan capitol city.”

- Dr. G.V.J.A. Harshavardhan, Director, Bharat Biotech International Ltd.

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

- Sanjay Murdeshwar, Country President, Novartis