



समृद्ध किसान - समृद्ध भारत



Progressive Haryana: Economic Profile

Progressive Haryana: Economic Profile

February 2019

PHD RESEARCH BUREAU

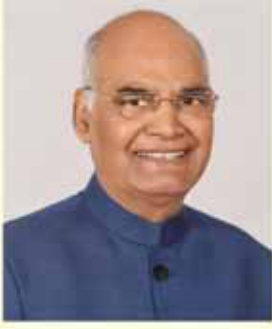
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सत्यमेव जयते

राष्ट्रपति

भारत गणतंत्र

PRESIDENT

REPUBLIC OF INDIA

MESSAGE

I am happy to know that the Government of Haryana is organising the 4th Agri Leadership Summit 2019 from February 15-17, 2019 at Haryana.

Agriculture is the backbone of the Indian economy, providing livelihood to a large segment of our population. We need to focus on opportunities in the agriculture sector and also address any concerns faced by different stakeholders. I am confident that the 4th Agri Leadership Summit 2019 will discuss opportunities for agri-start-ups and young agripreneurs and provide a roadmap for sustainable growth in the sector.

I extend my warm greetings and felicitations to the organisers and participants of the Summit. I wish the Summit every success.

(Ram Nath Kovind)

New Delhi
February 13, 2019



सत्यमेव जयते

उप-राष्ट्रपति, भारत

VICE-PRESIDENT OF INDIA

MESSAGE

I am glad to note that the 4th Agriculture Leadership Summit – 2019, is being organized by the Government of Haryana from 15 to 17 February 2019 in Gannaur, Sonapat. It is a timely initiative to provide a platform to national and international stakeholders to showcase their innovations intended to enhance agricultural productivity and fast track the growth of food processing industry in Haryana.

India has taken significant strides towards increasing the production of food grains over the last many decades. Today, India ranks high in the world in the production of milk, wheat, rice, fruits, and vegetables.

Strong Agriculture Sector is crucial to put India's economy on a sustainable & higher growth trajectory. Agriculture presents a unique opportunity to promote 'all-inclusive-growth' due to its multiplier effect on the rural economy.

My best wishes for the success of the 4th Agri Leadership Summit 2019.


(M. Venkaiah Naidu)

New Delhi
11th February, 2019.



सत्यमेव जयते

प्रधान मंत्री

Prime Minister
MESSAGE

I am pleased to learn that the 4th Agri Leadership Summit 2019 is being organized from February 15-17, 2019 at India International Horticulture Market (IIHM), Ganaur, Haryana.

Agriculture forms the backbone of our socio-economic system and the nation is indebted to the farmers. We remain firmly committed to ensure the all-round development of farmers, which is reflected in our resolve to double the income of farmers by 2022.

During the Budget, our Government announced the historic PM Kisan Samman Nidhi, under which farmers having less than five acres of land will be given Rs. 6,000 per year as support. The PM Kisan Samman Nidhi, along with other farmer-friendly measures like the Pradhan Mantri Fasal Bima Yojana, Pradhan Mantri Krishi Sinachai Yojana, Soil Health Cards, Minimum Support Prices, e-NAM, will surely benefit our hardworking farmer sisters and brothers.

The deliberations at the 4th Agri Leadership Summit will create an enabling environment for the participants to showcase the latest and best agricultural practices, resolve technical issues and bring about synergy among the various stakeholders in agriculture and its allied sectors.

Best wishes for successful deliberations at the Summit.

(Narendra Modi)

New Delhi
12 February, 2019

Dr. Mahesh Y Reddy
Secretary General
PHD Chamber of Commerce
PHD House, 4/2 Siri Institutional Area
August Kranti Marg
New Delhi- 110016



राधा मोहन सिंह
RADHA MOHAN SINGH



कृषि एवं किसान कल्याण मंत्री
भारत सरकार
MINISTER OF AGRICULTURE
& FARMERS WELFARE
GOVERNMENT OF INDIA

D.O 480/AM 13.02.2019

Message

India is now the fastest growing emerging economy in the world. Agriculture sector is one of the most important sectors of the Indian Economy. About half of the workforce still relies on agriculture as its principle source of income. Accelerating the growth of agriculture sector is therefore necessary not only to ensure food security but also to achieve a high growth trajectory.

I am delighted to note that the State Government of Haryana is organizing the 4th Agri Leadership Summit from 15-17 February 2019 in Gannaur, Sonapat, Haryana. The State has always been at the forefront in contributing to the agriculture growth in the country by adopting state-of-the art technologies and innovative agriculture practices.

This unique platform will bring together all relevant stakeholders to discuss flagged concerns and formulate strategies for expeditious and effective implementation of various central and state initiatives and policies particularly intended for giving a thrust to the participation of women and rural youth in agriculture.

The Agri Leadership Summit will provide a promising platform to all the stakeholders involved in agriculture and allied activities for exploring avenues for enhancing growth of agriculture sector, farmers, agro-processing industries and the economy as a whole.

I wish the Agri Leadership Summit 2019 all the success and hope it will accomplish its objectives.


(Radha Mohan Singh)

Hon'ble Chief Minister, Haryana

संदेश

हरियाणा के किसानों की मेहनत और सरकार द्वारा मुहैया करवाई गई ढांचागत सुविधाओं से भारत खाद्यान्न उत्पादन में आत्मनिर्भर बन रहा है। हरियाणा के किसान हमेशा ही कृषि उन्मुखी में अपनाई जाने वाली नई और नवीनतम तकनीकों को अपनाने में आगे रहे हैं।

वर्तमान में राज्य सरकार की आधुनिक कृषि और पशुपालन की तकनीकों के माध्यम से मिट्टी की उत्पादकता में बढ़ोतरी और पशुधन में वृद्धि, घाटे को कम करने के लिए कृषि ढांचागत भण्डारण में बढ़ोतरी, बाजार और कृषि के बीच के अन्तराल को कम करना तथा किसानों की आय में बढ़ोतरी को ध्यान में रखते हुए मूल्यवर्धित उत्पाद के सृजन को प्रोत्साहित करना मुख्य प्राथमिकता है। राज्य सरकार के प्राथमिक क्षेत्रों में किसानों, ग्रामीण युवा एवं महिलाओं की उद्यम दक्षता को निखारना शामिल है।

पिछले वर्षों की सफलता को देखते हुए राज्य सरकार कृषि नेतृत्व शिखर सम्मेलन का आयोजन करने जा रही है। मुझे यह जानकार खुशी है कि चौथा कृषि नेतृत्व शिखर सम्मेलन-2019 सोनीपत के गन्नौर स्थित आईआईएचएम में आयोजित किया जा रहा है।

मुझे विश्वास है कि चौथा कृषि नेतृत्व शिखर सम्मेलन-2019 सफलता के नये आयाम स्थापित करेगा और माननीय प्रधानमंत्री द्वारा उठाए गये प्रमुख कदमों के तहत वर्ष 2022 तक किसानों की आय दोगुणा करने को आगे बढ़ाएगा।

मैं सभी हितधारकों, जो इस अद्वितीय मंच का भाग हैं, को बधाई देता हूँ और सफलता की कामना करता हूँ।

(मनोहर लाल)

Om Prakash Dhankar



D.O. No.

Agriculture, Development &
Panchayats, Mines & Geology,
Animal Husbandry & Dairying
and Fisheries Minister, Haryana.

Dated Chandigarh

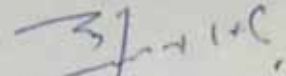
संदेश

कृषि क्षेत्र हरियाणा की अर्थव्यवस्था के अति महत्वपूर्ण क्षेत्रों में से एक है। इस क्षेत्र ने राज्य की सकल घरेलू उत्पाद दर की वृद्धि में न केवल उल्लेखनीय योगदान दिया है बल्कि भविष्य में राज्य की प्रगति में अपना योगदान बढ़ाने के लिए महत्वपूर्ण रणनीतियां भी तैयार की हैं। एक छोटा राज्य होने के बावजूद भी हरियाणा ने केन्द्रीय पुल में खाद्यान्नों की आपूर्ति में बड़ा योगदान देकर देश में अपनी एक अलग पहचान बनाई है। कृषि, कृषि-व्यतिकी एवं जलभराव तथा मत्स्य उपक्षेत्र-राज्य के कृषि एवं सम्बद्ध क्षेत्र का एक समावेश है।

किसानों के लिए आकर्षित विकल्प चुनने के कार्यक्रम तैयार करके कृषि को और अधिक लाभकारी व्यवसाय बनाने के लिए राज्य सरकार निरंतर प्रयास कर रही है। कृषि आय में वृद्धि हो इसके लिए राज्य में कृषि एवं एग्री व्यवसाय को बढ़ावा देने के लिए नई-नई योजनाओं एवं कार्यक्रमों को नियमित रूप से लागू किया गया है। इससे कृषि उत्पादकता, गुणवत्ता, मूल्यवर्धन, विपणन सुविधाएं, निवेश एवं भागीदारिता बढ़ना भी सुनिश्चित हुई हैं।

मेरे लिए यह अत्यंत खुशी व गर्व का विषय है कि राज्य सरकार ने वर्ष 2019 के लिए कृषि नेतृत्व शिखर सम्मेलन के चौथे चैप्टर का आयोजन करने की पहल की है। मुझे आशा है कि यह सम्मेलन स्टैक होल्डर्स को वर्तमान योजनाओं, राज्य सरकार की नीतियों एवं कदमों को बेहतर ढंग से समझने का एक अवसर प्रदान करेगा और वे इस अवसर का अधिक से अधिक लाभ उठाएंगे तथा यह सफलतापूर्वक हरियाणा के कृषि क्षेत्र को नई बुलंदियों पर ले जाने में सार्थक योगदान देगा।

मैं समारोह के सफल आयोजन के लिए अपनी शुभकामनाएं प्रेषित करता हूँ।


(ओम प्रकाश धनखड़)

**SANJAY AGARWAL
SECRETARY**



भारत सरकार
कृषि एवं किसान कल्याण मंत्रालय
कृषि, सहकारिता एवं किसान कल्याण विभाग
Government of India
Ministry of Agriculture & Farmers Welfare
Department of Agriculture, Cooperation
& Farmers Welfare



MESSAGE

The Government of India has initiated several policies and schemes for enhancing crop and livestock productivity, soil health and for doubling the farmer's income by 2022. In the recent budget, the Government announced direct income support to 12 crore small and marginal farmer families at the rate of Rs.6,000 per annum under PM Kisan Samman Nidhi [PM-KISAN] to bring in transparency and enhance farm incomes.

The State of Haryana is one of the fastest growing agrarian states. The agriculture sector contributes to around 19% of the state's GVA. Being self-sufficient in agricultural production, the state holds tremendous potential for investors to invest in agrobased industries.

I am pleased to note that the State Government is continuously taking steps towards higher value addition and enhanced processing in agriculture and allied sectors.

The noble initiative of State Government in organizing the Agri Leadership Summit, 2019 is highly appreciable. This will promote awareness amongst stakeholders about the vast investment opportunities underlying agriculture and food processing sector of Haryana. This will create better understanding of new agricultural technologies amongst farmers. The Agri Leadership Summit 2019 would thus contribute towards sustainable development of the state.

I wish the Agri Leadership Summit 2019 a grand success.


[Sanjay Agarwal]

February 12, 2019

D. S. Dhesi, IAS



D.O. No.

**Chief Secretary, Haryana,
Chandigarh - 160 001.**

E.mail : cs@hry.nic.in

Dated


MESSAGE

Haryana is one of the leading industrial states in the country and at the same time holds a place of significance in terms of agriculture production. This has been made possible due to the overall conducive business environment that the State offers for micro, small and medium scale industries facilitating ease of doing business, fiscal incentives and skill development for the promotion of agro-based food processing industries as an engine of growth.

The State Government is working continuously towards betterment of agriculture and industry in the State. The aim is to promote sustainable agriculture that will not only give a boost to industrial output but also provide food security and increase in income of millions of farmers. Several steps are being taken to enhance the employability of the rural youth and women in agriculture sector, motivating them and incubating them into agri entrepreneurs and thus bring about income sustainability in the rural economy.

I am sure that the 4th Agri Leadership Summit, 2019 will provide an awareness platform for the stakeholders about the present government schemes and developmental policies and result in generating agri leaders of the future.

I extend my best wishes for the success of the event.


(D.S. Dhesi)

Navraj Sandhu, I.A.S



D.O No: PS/ACC Agri/2019/14
Additional Chief Secretary to
Government Haryana,
Agriculture & Farmers Welfare Department,
Dated 11/02/2019

Message

Haryana is known for its progressive agriculture policies and practices. State Government had provided a strong infrastructure and facilities for increasing productivity and marketing of agricultural products.

Today, many of farmers are leading in production of agriculture and horticulture crops. These Agri-leaders need to be supported with technical knowledge. The State is poised for ushering in a new era of Agri- entrepreneurship led by farmers and FPOs. We want to upgrade our farmers in the value chain so that they can access better income.

I believe that the continued efforts of the state government in organizing the Agri. Leadership Summit over the last 3 years will help agriculture growth with a special focus on agribusiness sustainable agriculture, micro irrigation, organic farming, increasing productivity.

Agri-Leadership Summit has been a successful step in linking farmers with the market.. I believe that this 4th leadership summit will further strengthen this movement towards farmers' entrepreneurship in agribusiness.

Hope the event will be grand success.


(Navraj Sandhu)



KRISHNA GAHLAWAT,
EX. MINISTER

No. 33

Date: 11-02-2019

CHAIRPERSON
HARYANA STATE AGRICULTURAL MARKETING BOARD
C-6, SECTOR-6, PANCHKULA - 134 109 (HARYANA)
Ph. : (0) 0172-2560092

**Message from Smt Krishna Gahlawat, Chairman, Haryana State
Agriculture Marketing Board**

The state of Haryana is being proudly known as the "Bread Basket of India" contributing 45% of rice and 65% of wheat to the central pool and more than 5% to total food production of the country. It has been in the forefront in terms of the adoption of latest technologies in agriculture and is also counted as one of the leading states for Agriculture production in the country. Haryana is self-sufficient in food production and the second largest contributor to India's central pool of food grains.

To move forward, the state has adopted agriculture best practices that ensure the production of quality agriculture produce and attract better prices in national and international markets. Several initiatives have been taken by the Haryana State Agriculture Marketing Board to enable farmers to sell fresh vegetables and fruits directly to the consumers and get remunerative prices for their produce.

I am sure that the 4th Agri Leadership summit will be a guiding light for the farmers to grow up as Agriculture leaders and attain a status of the National Prosperous Farming Community.

Best wishes for the Agri Leadership Summit to attain a grand success.

Krishna Gahlawat
(Krishna Gahlawat)



समृद्ध किसान, हमारी पहचान

HARYANA STATE AGRICULTURAL MARKETING BOARD

MANDI BHAWAN, C-6, SECTOR-6, PANCHKULA-134 109 (HARYANA)

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No. P.SCA-109

Dated 12.02.2019

Haryana is known as the 'food bowl' of India and provides promising prospects in the agriculture sector. The Haryana State Agricultural Marketing Board has been tasked with promoting the agriculture marketing in the State. I am happy to share that the HSAMB has been successfully implementing this task through its wide network of mandis for the past four decades.

Taking forward the vision of the Hon'ble Prime Minister of India of doubling the farmers' income, the HSAMB has been successfully implementing schemes like the e-NAM and the Bhavantar Bharpai Yojna (BBY). The promotion of direct marketing and elimination of the middlemen has made positive changes in the farmers income.

The 4th Agri Leadership Summit is an opportunity wherein the HSAMB can showcase its achievements and can also learn from the farmers and agri leaders. This Summit provides an excellent platform wherein various stakeholders came together and there is a positive sharing of ideas. I am very excited to be hosting this event and extend a very warm welcome to one and all.

(Dr. J. Ganesan, IAS)



समृद्ध किसान - समृद्ध भारत



Progressive Haryana: Economic Profile

From President's Desk, PHD Chamber



Shri Rajeev Talwar

Agriculture sector plays a significant role in providing food security, reducing poverty and sustaining economic growth. The sector forms important demand supply linkages with industry and service sectors. The sector contributes around 16% to India's GVA and provides livelihood to significant proportion of the population.

The government of India has announced an agro-export policy to double exports from around USD30 billion to USD60 billion in next two years. Further, the government has given major thrust to doubling farmers' income by 2022. I am confident that these reform measures would lead to significant outcomes and enhance the productivity of agriculture sector, going forward.

Haryana is an agrarian state and one of the key contributors to the national food basket. The state enjoys top position in the production of basmati rice.

The Government of Haryana has been regularly endeavoring to give a fillip to the agriculture sector by undertaking various initiatives and schemes for giving an impetus to agriculture and allied sectors in the state.

The state government's initiative of organizing an Agri Leadership Summit, 2019 is highly appreciable. My best wishes for the success of the Agri Leadership Summit 2019.

(Rajeev Talwar)





समृद्ध किसान - समृद्ध भारत



Progressive Haryana: Economic Profile

From Senior Vice President's Desk, PHD Chamber



Shri D K Aggarwal

The state of Haryana has made a special place for itself in the agriculture sector of India. The state is self sufficient in food production and is the second largest contributor of food grains to the central pool. Haryana is blessed with diverse cropping pattern and agro-ecology. The state is also emerging as one of the leading states in the field of horticulture. The state holds tremendous potential for the agro-based and food processing industries.

The government of Haryana has given high priority to the agriculture and allied sector and has taken commendable steps to promote inter cropping with agro forestry, farm mechanization and value addition of crop produce.

I believe that the continued efforts of the state government in organizing the Agri Leadership Summit over the last 3 years will help agriculture in Haryana getting a status of Sustainable Agriculture.

At this backdrop I am sure that the state will continue its proactive measures to boost the agriculture sector through Agri Leadership Summit 2019.

I wish the Agri Leadership Summit 2019 a grand success.

(DK Aggarwal)





समृद्ध किसान - समृद्ध भारत



Progressive Haryana: Economic Profile



Shri Sanjay Aggarwal

From Vice President's Desk, PHD Chamber

Haryana has witnessed a significant growth path over the years. The state is being proudly known as the "Bread Basket of India". It has been in the forefront in terms of the adoption of latest technologies in agriculture and is also counted as one of the leading states for Agriculture production in the country. The state is consistently encouraging farmers to adopt latest farm technology to increase the farm sector output.

Considering, the susceptibility of agriculture to natural risks and uncertainties, the State Government has taken commendable steps to mitigate the risks in agriculture.

The state government is taking strides in the direction of producing fine quality of crop produce that will attract higher prices not only in the domestic markets but will also can gain popularity on the global platforms.

I am sure that the Agri Leadership Summit, 2019 would support the state government's objective to make farming a profitable enterprise and give a boost to the agricultural sector of the state. My best wishes for the success of the Agri Leadership Summit 2019.

(Sanjay Aggarwal)





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Progressive Haryana: Economic Profile



Dr Mahesh Y Reddy

From Secretary General's Desk, PHD Chamber

Haryana is a very progressive state in the adoption of policy environment and a leading state for setting the pace for other states in the growth and productivity levels of agricultural produce.

The agri-infrastructural linkages such as cold chain, storage and warehouses and road connectivity are important for the growth and productivity of the agriculture sector and to reduce the wastages. Therefore, state of the art technology plays a very important role in the adoption of the dynamic schemes of the central government and state governments for fruitful outcomes and welfare creation for the masses at the ground level.

As Haryana is always at the forefront of implementation of policy environment, the state focussed on organizing the 4th Agri Leadership Summit to connect the farmers, government, academia, intellectuals and other stakeholders to come on stage to share the expertise and thought process and to move ahead for the progress of the state to the next level with the improved incomes of farmers.

PHD Chamber has its strong linkages with the government, industry stakeholders, academia, experts, socio-economic segments and farmers; the Chamber has provided its full hand-holding to the dynamic state government to make this year's Agri Summit, a grand success and to make visible the fruitful outcomes of this noble initiative of state government.

(Dr Mahesh Y Reddy)





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Progressive Haryana: Economic Profile



Shri Pranav Gupta

From Chairman's Desk, Haryana Chapter, PHD Chamber

Haryana has become a food surplus state due to its strong agri-infrastructure facilities and agriculture research and development support. The state contributes significantly to India's agricultural exports. The state's vision 2030 is appreciable as it focuses on modernization of irrigation systems, persuasion of crop diversification, timely availability of quality feedstock at subsidized rates and introduction of modern technologies, among others.

The continued efforts of the state government in organizing the Agri Leadership Summit over the last few years are appreciable. The engagement of all the stakeholders in the summit, the government, academia, industry and growers is encouraging for further policy plan for an inclusive and balanced growth of the sector and the rural economy.

I am hoping that this Summit would support in the government's effort in boosting agriculture sector of the state. My best wishes for the success of the Agri Leadership Summit 2019.

(Pranav Gupta)





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Progressive Haryana: Economic Profile

Abbreviations

A&D	Aerospace & Defence	LIG	Lower Income Group
AE	Advance Estimates	LOI	letter of Intent
Agri	Agriculture	MOFPI	Ministry of Food Processing Industries
BE	Budget Estimate	MoU	Memorandum of Understanding
BPM	Business Process Management	MRO	Maintenance, Repair and Overhaul
BRAP	Business Reform Action Plan	MSME	Micro, medium and small enterprise
CAGR	Compound Annual Growth Rate	MW	Mega Watt
Capex	Capital Expenditure	NCR	National Capital Region
CB	Commercial Banks	NFSM	National Food Security Mission
CCDP	Crop Cluster Development Programme	NIFTEM	National Institute of Food Technology Entrepreneurship and Management
CD	Credit to Deposit	NNI	Net National Income
CEO	Chief	NOC	No Objection Certificate
CETP	Common Effluent Treatment Plant	NSDP	Net State Domestic Product
CGTMS E	Credit Guarantee Fund Trust for Micro and Small Enterprises.	OEM	Original Equipment Manufacturer
CLU	Change of Land Use	PD	Primary Deficit
CPCB	Central Pollution Control Board	PE	Provisional Estimates
Cr	Crore	PMFBY	Pradhan Mantri Fasal Bima Yojana
DFC	District Facilitation Centers	PPP	Public Private Partnerships
DMIC	Delhi Mumbai Industrial Corridor	QE	Quick Estimates
DSR	Direct Seeding of Rice	R&D	Research and Development
EDW	External Development Works	RBI	Reserve Bank of India
e-NAM	National Agriculture Market	RCD	Regional Cooperation for Development
EPP	Enterprise Promotion Policy 2015	RD	Revenue Deficit
ESDM	Electronics System Design and Manufacturing	RE	Revised Estimate
EWS	Economically Weaker Sections	RKVY	Rashtriya Krishi Vikas Yojana
FAM	Familiarization	ROB	Road Over Bridges





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Progressive Haryana: Economic Profile

FBO	Fixed Base Operator	RRB	Regional Rural Banks
FDI	Foreign Direct Investment	Rs	Rupee
FIGs	Farmer Interest Groups	SAARC	South Asian Association for Regional Cooperation
FPOs	Farmers Producer Organization	SEZ	Special Economic Zones
FY	Financial Year	Sq. km	Square Kilometer
GDP	Gross Domestic Product	TDR	Transfer of Development Rights
GFCF	Gross Fixed Capital Formation	UGPL	Under Ground Pipe Line
GFD	Gross Fiscal Deficit	USD	United States Dollar
GOI	Government of India		
GSDP	Gross State Domestic Product		
GSVA	Gross State Value Added		
HAFED	Haryana State Co-Op. Supply & Marketing Fed.		
HLRDC	Haryana Land Reclamation & Development Corporation		
Hon'ble	Honorable		
HSAMB	Haryana State Agricultural Marketing Board		
HSDC	Haryana Seeds Development Corporation Ltd.		
HSDM	Haryana Skill Development Mission		
HSIIDC	Haryana State Industrial and Infrastructure Development Corporation		
IBEF	India Brand Equity Foundation		
IGI	Indira Gandhi International		
IT	Information Technology		
ITeS	Information Technology enabled Services		
IWRD	Irrigation & Water Resources Department, Haryana		
Km	Kilometer		





Progressive Haryana: Economic Profile

Haryana

Haryana is a state known for its rich cultural and heritage strengths. The state is acknowledged for its famous legends and vedic references. The state holds strong footprints in the great epic of Mahabharata. The state is a land where saint Ved Vyas wrote Mahabharata which is one of the famous Indian epics. Haryana is a land locked state located in the northern part of India. The state shares its boundary with Uttar Pradesh in the East, Punjab in the West, Himachal Pradesh in the North and Rajasthan in the South. The state also surrounds national capital of Delhi from three sides. It is one of the prosperous states of India endowed with rich natural and agricultural resources. Haryana is mainly an agricultural state with abundant fertile land. The agriculture sector of the state has benefited by the Green Revolution which took place in the state. Further, the state is home to many species of flora and fauna.

Haryana has witnessed fast pace of industrial development over the years. The state is famous for its handicrafts and handlooms which are exported to various parts of the world. Phulkari embroidery is a prominent art work of Haryana.





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Progressive Haryana: Economic Profile

Executive Summary

Haryana, the 'Bread Basket of India', is known for its rich cultural and heritage strengths. The state is acknowledged for its famous legends and vedic references. The state is one of the fastest growing agrarian states and has created a distinct place for itself in Indian Economy. At the same time, Haryana has transformed and emerged as a veritable hub of knowledge and a vibrant and fast growing industrial powerhouse.

The GSDP of Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 3.5 lakh crore in FY2013 to about Rs. 6.1 lakh crore in FY2018. The size of economy of Haryana is expected to surpass more than Rs. 11.2 lakh crore by FY2023. Tertiary sector contributes a significant share of around 49.8% in the GSVA of the state followed by the secondary sector and primary sector at 30.7% and 19.5% respectively during FY2017. The NSDP (at current prices) of the Haryana has increased significantly from Rs 3.1 lakh crore in FY2013 to around Rs 4.9 lakh crore in FY2017.

The GSDP (at constant prices) of the state has grown at 7.9% (average) during the period FY2013 to FY2018. Going forward, the state could achieve a sustainable 10% GDP growth (at constant prices) in the next three to five years and thereafter could strive for 12% GDP growth. To achieve this, it would be imperative to focus on improving quality of infrastructure, agriculture, rural development, industry, education, services sector and tourism that would boost economic development in the state.

Haryana offers a wide range of fiscal and policy incentives for boosting growth of various sectors of the economy. The state has made impressive strides over the years in industrialization. The key industries of the state are agro-based industry, automotive, bicycles, IT/ITeS, oil refining, sanitary ware, textiles, among others. The key districts of the state include Ambala, Faridabad, Gurugram, Kurukshetra, Karnal, Panipat, among others.

Haryana is an agricultural state with majority of the state's total geographical area under cultivation. The state has diverse agro-ecology and cropping pattern. The state enjoys first position in the production of basmati rice and productivity in pearl millet and rapeseed and mustard. Major crops grown in the state include rice, wheat, pulses, cotton, sugarcane, pearl millet and rapeseed and mustard. Going ahead, the exploration of the potential of agro-based and food processing industry would provide a boost to the economy of the state and create employment.

During the last decade, the services sector of the state has performed significantly better and has emerged as a major segment with a growth rate of around 10.5% in the last five years. The state has done very well in the field of information technology with the emergence of Gurugram as the hub of IT Industry. The numbers of commercial banks and regional rural banks have increased over





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Progressive Haryana: Economic Profile

the years in the state. The total deposits of commercial banks and regional rural banks stood at around Rs 3.1 lakh crore in September 2017 and total advances at around Rs 2.1 lakh crore in September 2017. Further enhancement of financial infrastructure, through innovative schemes and measures would increase financial inclusion in the state.

Haryana has continuously focused on providing better and modernised infrastructural facilities in the state. In order to build a strong infrastructure base in the state, participation of private sector is highly encouraged by the state government through public private partnerships (PPP). Haryana boasts of having good network of road and railway infrastructure. The state has 2741 km of national highways and 1801 km of state highways.

Going forward, the focus on improving quality of infrastructure, enhancing agriculture productivity, establishing agro-based and food processing industries in the rural areas of the state, bringing appropriate reforms in the labor market and reforming manufacturing sector, would push the state on high growth trajectory in the coming times.



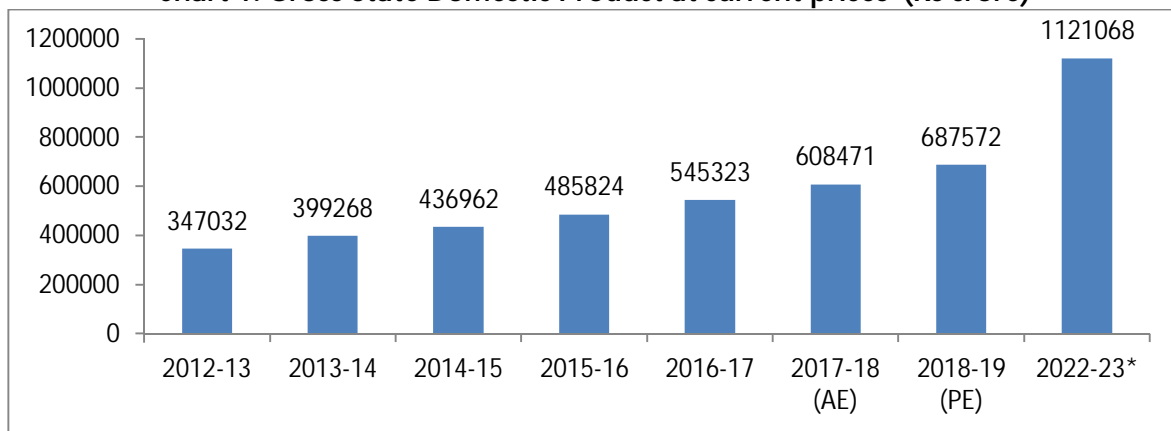


Progressive Haryana: Economic Profile

1. Structure of the Economy

The GSDP Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 3,47,302 crore in FY2013 to about Rs. 6,08,471 crore in FY2018. The GSDP (at current prices) of the state has grown at 11.9% (average) during the period FY2013 to FY2018. The size of economy of Haryana is expected to surpass more than Rs. 11.2 lakh crore by FY2023.

Chart 1: Gross State Domestic Product at current prices (Rs crore)



Source: PHD Research Bureau, compiled from Haryana State Budget 2018-19 (Note: *PHD Research Bureau estimates; PE: Provisional Estimates; AE: Advanced Estimates)

Tertiary sector contributes a significant share of around 49.8% in the GSVA of the state followed by the secondary sector and primary sector at 30.7% and 19.5% respectively during FY2017. The NSDP at current prices of the Haryana has increased significantly from Rs 3,14,353 crore in FY2013 to around Rs 4,94,090 crore in FY2017.

Table 1: Gross State Domestic Product and its Composition

Components	FY2013	FY2015	FY2017
GSDP at current prices (Rs. crore)	347032	436962	545323
NSDP at current prices (Rs. crore)	314353	395890	494090
Economic Growth % (GSDP at constant prices)	7.7	5.7	8.7
Sectorial Contribution in GSVA at current prices (%)			
Primary	22.4	20.2	19.5
Secondary	32.4	31.5	30.7
Tertiary	45.2	48.3	49.8

Source: PHD Research Bureau, compiled from Ministry of Statistics and Programme Implementation, Government of India and Haryana State Budget 2018-19. Primary sector include Agriculture, forestry and fishing and Mining and quarrying; Secondary sector include Manufacturing, Electricity, gas, water supply & other utility services and Construction; Tertiary sector include Trade, repair, hotels and restaurants, Financial services, Real estate, ownership of dwelling & professional services, Public administration and Other services





Progressive Haryana: Economic Profile

Table 2: Summary of socio-economic indicators

State Capital	Chandigarh
Hon'ble Governor of Haryana	Shri Satyadeo Narain Arya
Hon'ble Chief Minister of Haryana	Shri Manohar Lal Khattar
Geographical Area (Sq. km)#	44,212
Population (Census 2011)	27.4 Million
Population Density (persons/Sq. Km) Census 2011	573
No. of districts	22
GSDP at Current Prices (FY2018)	Rs. 6,08,471crores
Growth of GSDP at Current Prices (FY2018)	11.6%
NSDP at Current Prices (FY2017)	Rs. 4,94,090 crores
Growth of NSDP at Current Prices (FY2017)	12.8%
Per Capita NSDP at Current Prices (FY2017)	Rs. 1,80,174
Growth of Per Capita NSDP at Current Prices (FY2017)	11.2%
Population below poverty line (%)^	11.2%
Gross Fiscal Deficit as % of GSDP (FY2019-BE)	2.9%
National Highway length (Kms)	2741
State Highways (Kms)	1801
Literacy Rate (2011 Census)	75.6%
Sex Ratio (2011 Census)	879 female per 1000 males
Key Industries	Agro-Based Industry, Automotive, Bicycles, Biotechnology And Petrochemicals, IT/ITesS, Oil Refining, Real Estate and Construction Sanitary Ware, Scientific Instruments, Textiles, Tourism,
Main Districts of the State	Ambala, Faridabad, Gurugram, Karnal, Kurukshetra and Panipat
Prominent tourist destinations	Karna Lake (Karnal), Loco Shed (Rewari), Mata Mansa Devi, Panchkula, Morni Hills (Panchkula), Nada Sahib Gurudwara (Panchkula), Nahar Singh Mahal (Faridabad), Pinjore (Panchkula),Yadavindra Garden, among others.

Source: PHD Research Bureau, compiled from Government of Haryana, Census 2011, Government of India, IBEF, among other sources. # Data pertains from Economic Survey of Haryana 2017-18, ^ Percentage of Population below Poverty Line - 2011-12, according to Tendulkar Methodology Planning Commission, Government of India, June 2014



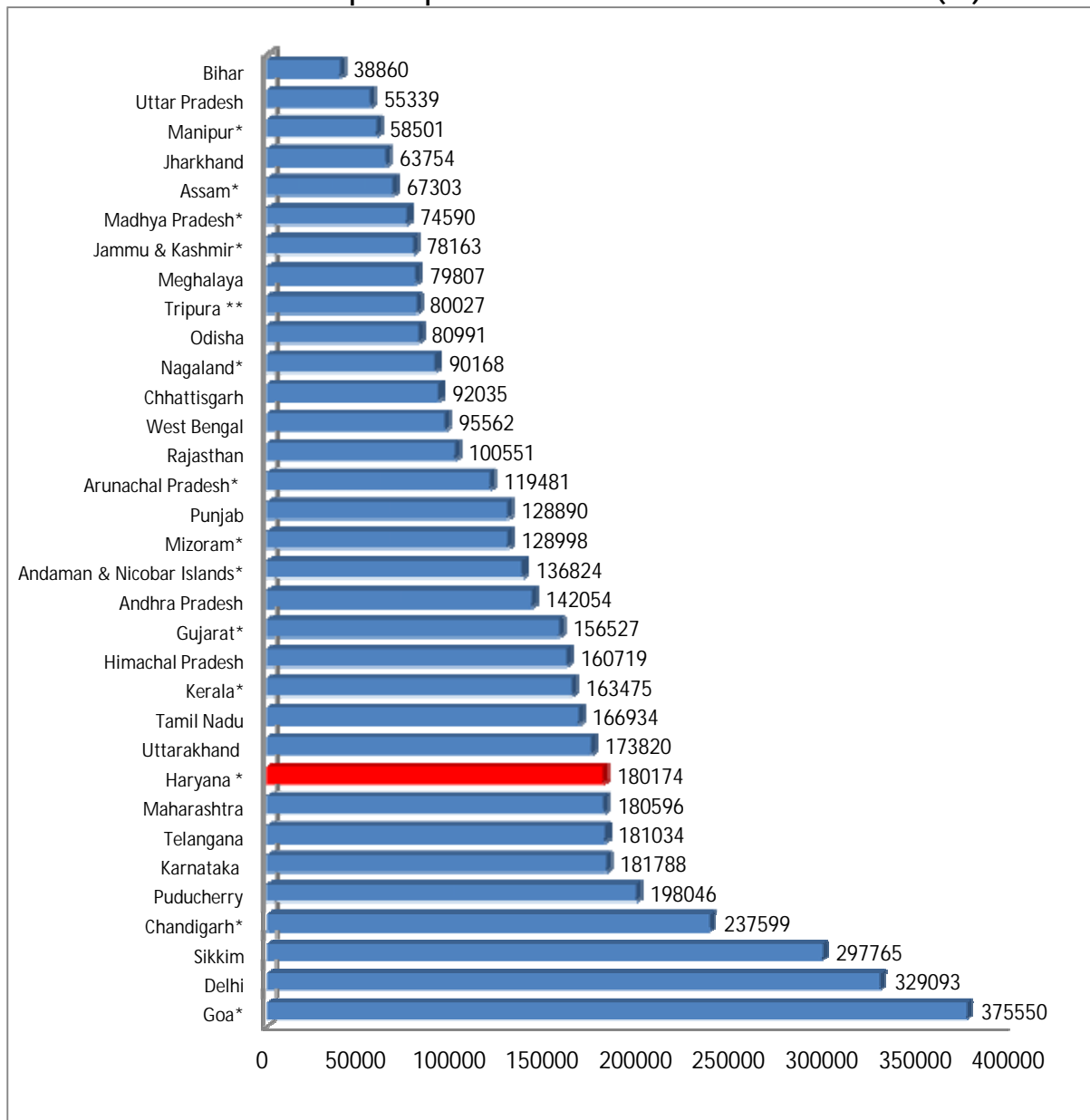


Progressive Haryana: Economic Profile

1.1 Per-capita income

Per capita income of Haryana has increased significantly over the years. The per capita NSDP (at current prices) has increased from Rs 1,06,085 in FY2012 to Rs 1,38,300 in FY2014 and Rs. 1,80,174 in FY2017.

Chart 2: Pattern of per-capita income of the Indian states in FY2018 (Rs)



Source: PHD Research Bureau, compiled from Ministry of Statistics and Programme Implementation, Govt. of India. Note: Comparable data available for FY2018 at current prices base year of 2011-12, * data pertains to FY2017, ** data pertains to FY2016, Data for Dadra and Nagar Haveli, Lakshadweep and Daman & Diu are not available.





Progressive Haryana: Economic Profile

1.2 Fiscal Deficit

The Gross fiscal deficit of the state as a percentage of GSDP has stood at 2.9% in FY2019. Primary deficit as percentage of GSDP has declined to 0.8% in FY2019 as against 2.8% in FY2018. Revenue deficit decreased to 1.2% in the FY2019 from 1.4% in FY2018.

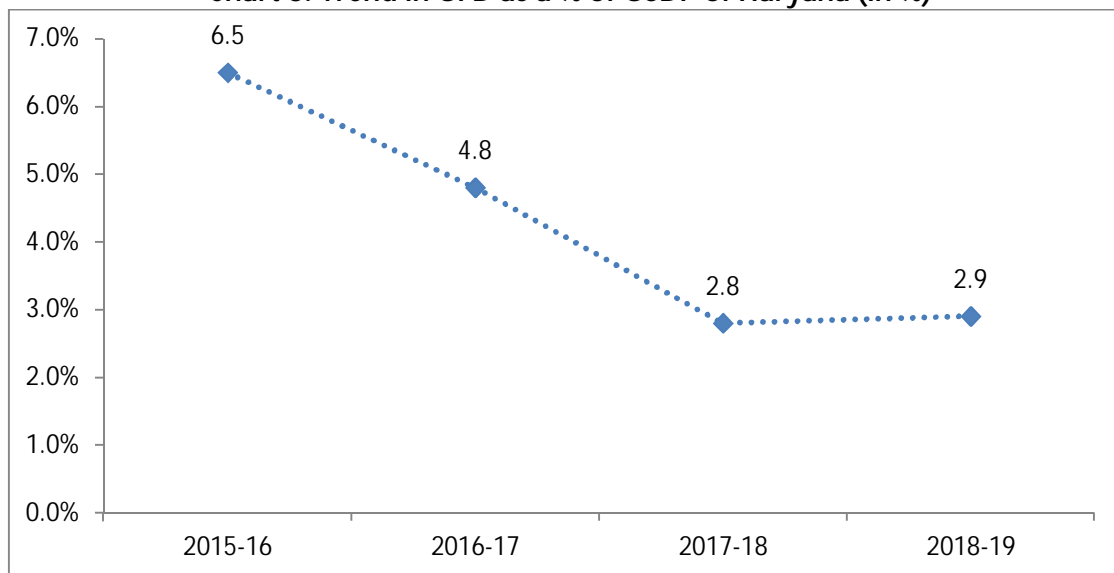
Table 3: Fiscal Indicators (% of GSDP)

Fiscal components	2015-16	2016-17	2017-18 (RE)	2018-19 (BE)
RD/GSDP	2.4	2.9	1.4	1.2
GFD/GSDP	6.5	4.8	2.8	2.9
PD/GSDP	4.8	2.9	0.9	0.8

Source: PHD Research Bureau, compiled from RBI. RD: Revenue Deficit, GFD: Gross Fiscal Deficit, PD: Primary Deficit; BE: Budgeted Estimates, RE: Revised Estimates, (-) sign refers to surplus.

The Gross fiscal deficit of the state as a percentage of GSDP stands at 2.9% in FY2019 as compared to 2.8% in previous fiscal year. The same stood at 6.5% and 4.8% in FY2016 and FY2017 respectively.

Chart 3: Trend in GFD as a % of GSDP of Haryana (in %)



Source: PHD Research Bureau, compiled from RBI



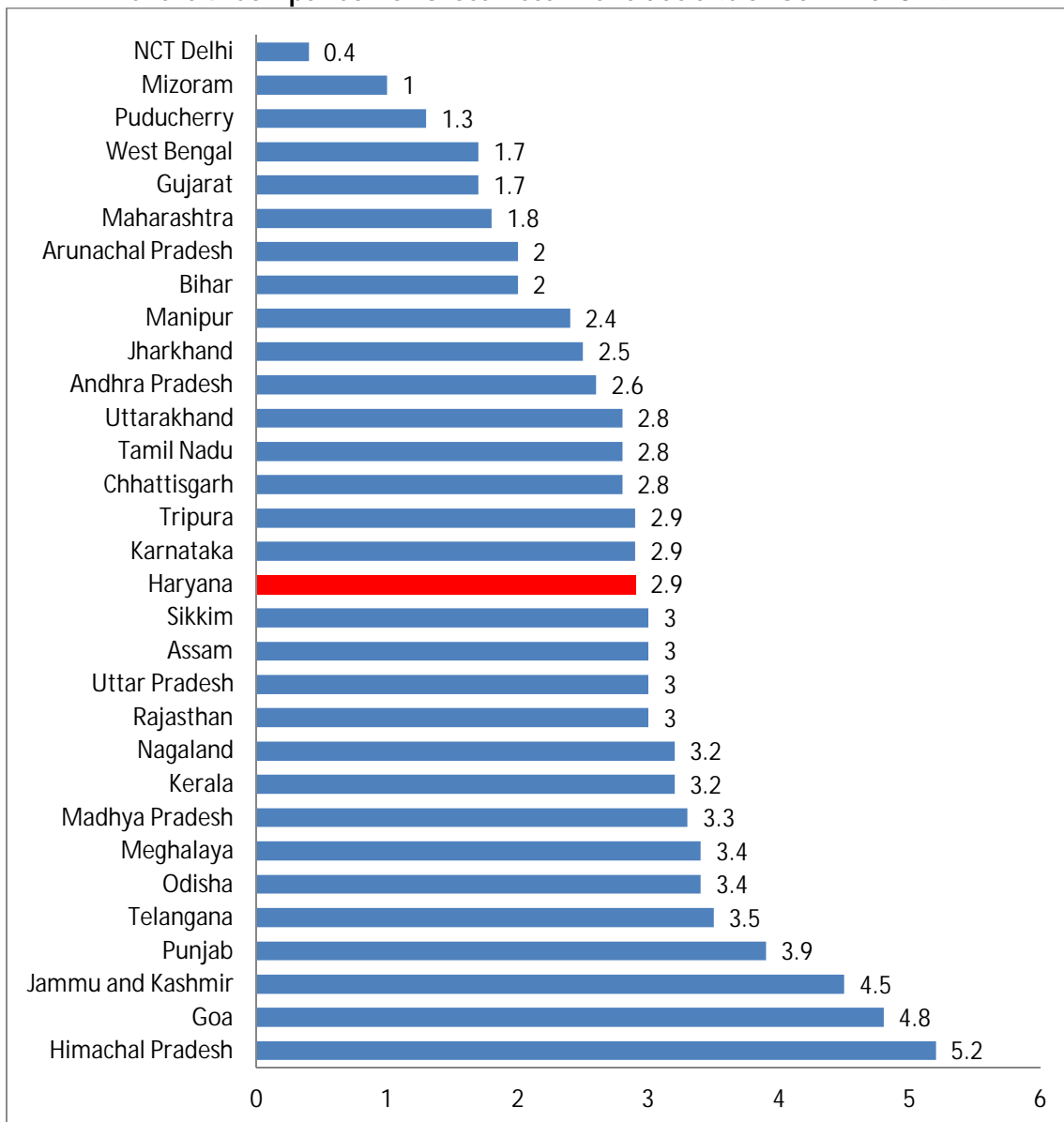


Progressive Haryana: Economic Profile

1.3 Comparison of fiscal position with other states

Gross fiscal deficit as a percentage of GSDP of Haryana is lower in comparison to states like Sikkim, Assam, Uttar Pradesh, Rajasthan, Kerala, among others and higher than the states like Delhi, Karnataka, Chhattisgarh, Tamil Nadu, Gujarat, Maharashtra, Bihar, among others.

Chart 4: Comparison of Gross Fiscal Deficit as a % of GSDP 2018-19



Source: PHD Research Bureau, Compiled from RBI, Note: Data pertains to 2018-19 (Budget Estimates)

Note: Data for Andaman and Nicobar Islands, Dadra and Nagar Haveli, Lakshadweep, Daman & Diu, Chandigarh are not available.





Progressive Haryana: Economic Profile

1.4 Industrial investments

Haryana has emerged as one of the most industrialized States in the country in the recent times. Haryana has transformed and emerged as a veritable hub of knowledge and a vibrant and fast growing industrial powerhouse. Haryana is strategically located in the heart of India and surrounds the National Capital Delhi on three sides. Nearly 40% of the State falls in the National Capital Region and 66% under the DMIC Influence zone.

The State has made impressive strides over the years to make a special place for itself in the fields of automobiles, electronic hardware, engineering, hi-technology industries, Information Technology, leather and textiles. The State has been a leader in manufacturing of a number of products like cars, footwear, scientific instruments, tractors, two-wheelers, etc. Gurugram has emerged as the Business Process Management (BPM) Capital of the country employing about 5% of the total worldwide workforce in the sector, besides being home to offices of a number of international and national corporates.

The state has taken numerous initiatives for promoting industrialisation in the sectors such as Auto, Auto components and general engineering, agro-based, food processing and allied industry, apparel and handlooms, defence and aerospace manufacturing, pharmaceutical and chemical industry, renewable energy and solar parks, textiles, transportation/logistics hub/inland port/container depot, among others, through ease of doing business and facilitation, e-governance and investment promotion. Department of Industries and Commerce, Town and Country Planning Department, Commerce Department/ Trade Fair Authority Haryana, District Facilitation Centers (DFC), Investment Promotion Center, Textile Incubation Center, among others are making significant contribution to facilitate entrepreneurs and develop industrial infrastructure in the state.

The share of Haryana in India's industrial investment proposals has shown a fluctuating trend over the years. The average share of Haryana in country's industrial investment proposals stands at around 0.7% during 2014 to 2017.

Table 4: Industrial Investment Proposals in Haryana vis-à-vis India (Rs Crore)

Year	Haryana	India	Share of Haryana in India's Total industrial investment proposal (%)
2014	2681	405027	0.7
2015	2872	311031	0.9
2016	2152	414086	0.5
2017	2469	395296	0.6
2018(November)	2319	411738	0.6

Source: PHD Research Bureau, Compiled from Department of Industrial Policy and Promotion, Govt. of India



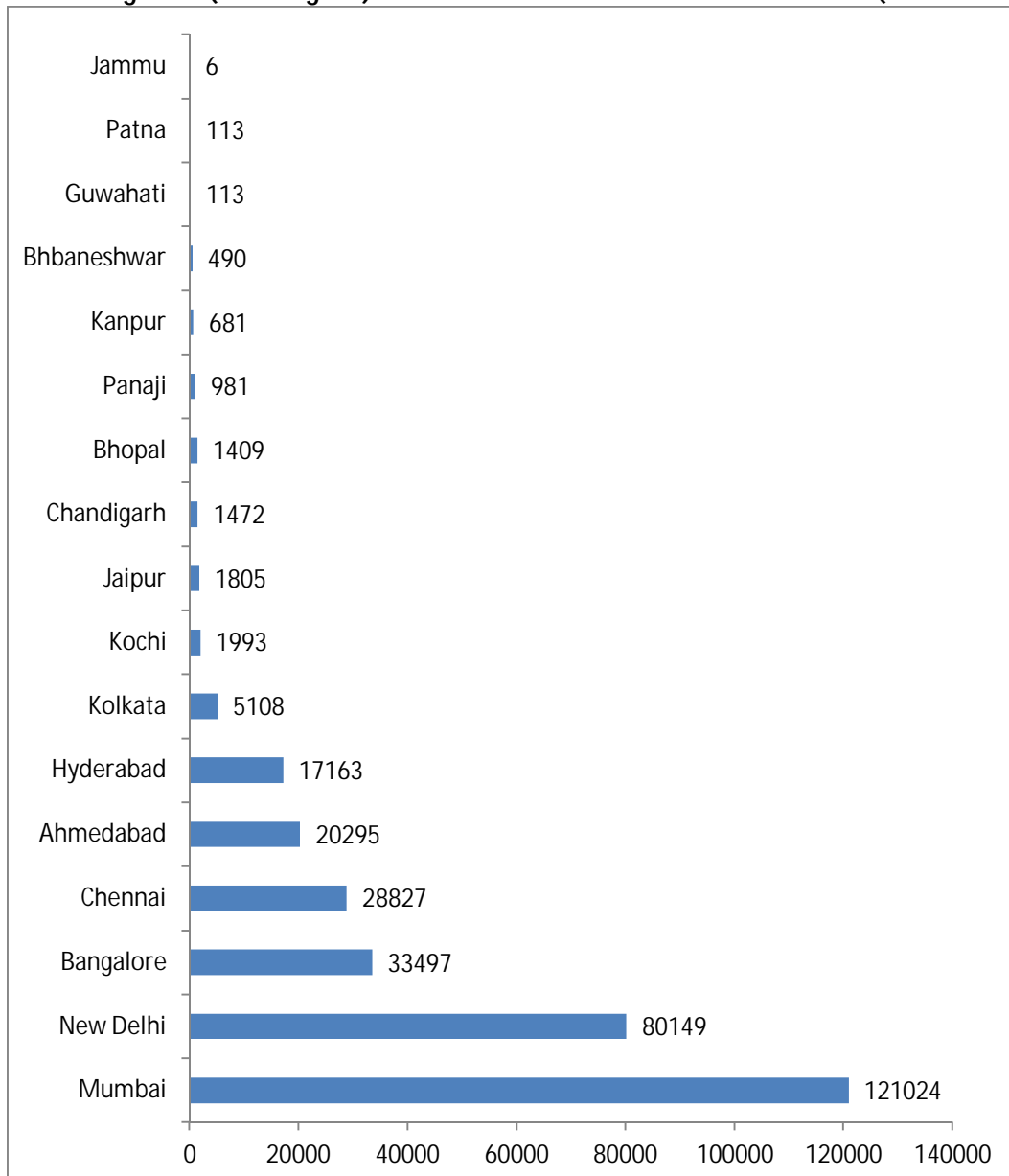


Progressive Haryana: Economic Profile

1.5 FDI inflows

During recent years, the FDI inflows (Chandigarh region)¹ in the state have posted a steady growth. The region constitutes 0.5% of the total FDI inflows in India.

Chart 5: Regional (Chandigarh) share of FDI in India's total FDI inflows (USD million)



Source: PHD Research Bureau, Compiled from Department of Industrial Policy and Promotion, Govt. of India.
Note: Data pertains to April'00-September '18 and represents FDI equity inflows

¹Pertains to Chandigarh, Punjab, Haryana, Himachal, Pradesh





Progressive Haryana: Economic Profile

FDI inflows² in Chandigarh region has increased tremendously from USD6 million during FY2017 to USD108 million in FY2018. The cumulative FDI inflows during April, 2000-September, 2018 stands at about USD 1472 million.

Table 5: Pattern in attracting FDI (equity) inflows: Chandigarh Region

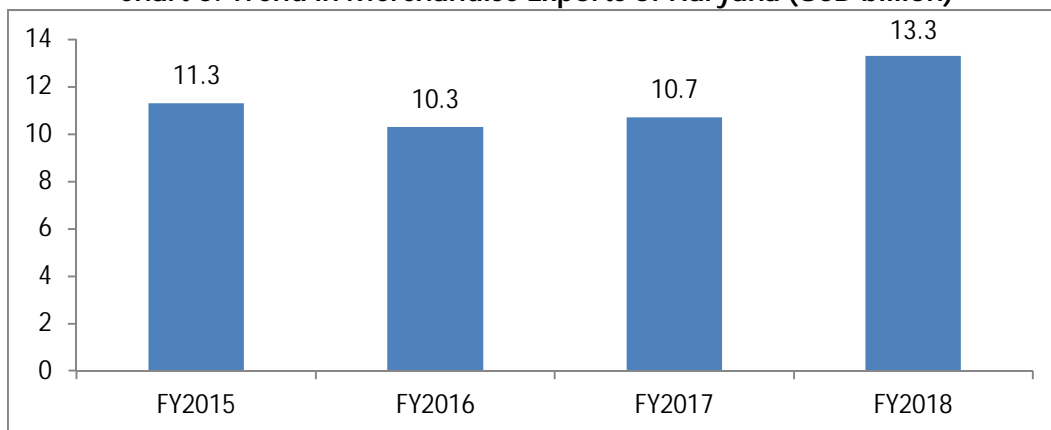
Year	FDI inflows (USD million)
FY 2016-17	6
FY 2017-18	108
Cumulative Inflows (April, 2000 -September, 2018)	1472

Source: PHD Research Bureau, compiled from Department of Industrial Policy and Promotion, Government of India.

1.6 Exports

Exports play a vital role in the economic growth of Haryana as the state's performance on the export front has been excellent. The total exports from the state have increased from USD11.3 billion during FY2015 to USD13.3 billion during FY2018. The major export items from the state are software, handloom products, scientific instruments, garments, automobiles and automotive components, electrical appliances, rice, pickles, etc. Haryana is among the leading states in terms of IT exports. As of September 2015, Gurugram accounted for a share of around 9% in the overall software exports from the country. Haryana is one of the biggest contributors of foodgrains to the Central Pool. The state boasts of contributing a share of more than 60% in the export of Basmati Rice. In order to encourage exports from the state, the state government has taken several policy measures to harness entrepreneurial efforts in the state. The state exported basmati rice worth USD 361.35 million in April-October 2017.

Chart 6: Trend in Merchandise Exports of Haryana (USD billion)



Source: PHD Research Bureau, compiled from IBEF (* Data till September 2018)

²Represents FDI equity inflows

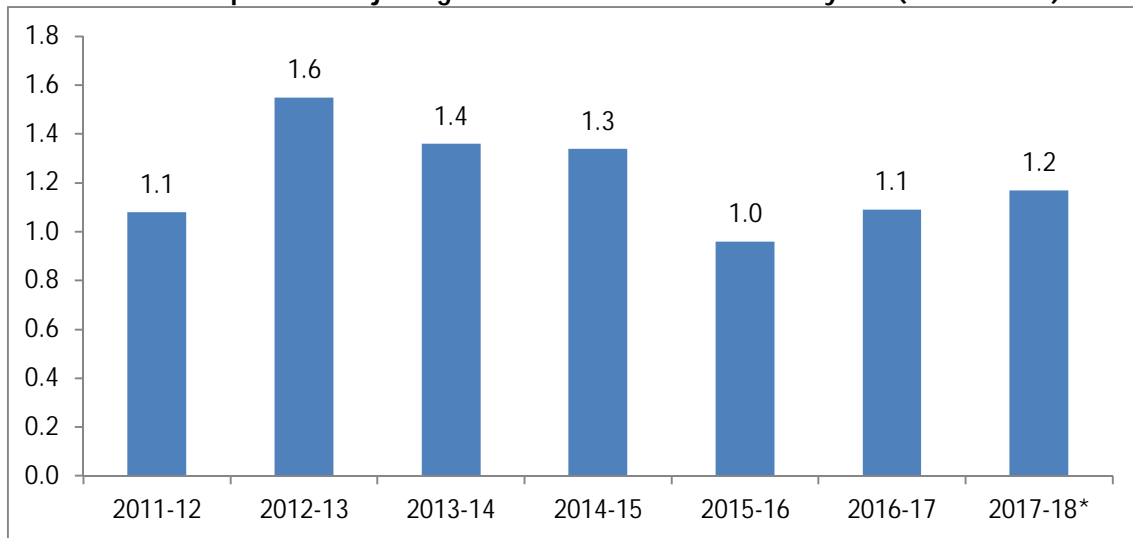




Progressive Haryana: Economic Profile

Haryana's exports of major agricultural products stood at USD 1.2 billion in 2017-18³ as compared to USD1.1 billion in the previous fiscal year. The state accounted for 7% of India's agricultural exports in FY2018.

Chart 7- Export of Major Agricultural Products from Haryana (USD Billion)



Sources: PHD Research Bureau, Compiled from various sources, IBEF; * Represents data up to February 2018

The state government has also launched a scheme of State Export Awards in the year 1996 with a view to acknowledge and recognise the contribution of exporting units. The export performance of the state has increased during the last few years. The State Government emphasizes on tapping the potential of Special Economic Zones (SEZ) in driving industrial/ economic growth and facilitating exports. The State has come out with Haryana Special Economic Zones Act, 2006 for facilitating development of SEZs in the state. The setting up of SEZs in sectors like IT/ITeS, biotechnology, handicrafts, etc., has facilitated exports in the state.

³Upto February 2018





Progressive Haryana: Economic Profile

2. Agriculture and Allied Sector

Haryana is an agricultural state with nearly 80% of the state's total geographical area under cultivation. The state has diverse agro-ecology and cropping pattern. There are mainly three agro-eco-regions in the state which have better irrigation facilities and quality infrastructure. Haryana is one of the key contributors to the national food basket. The state enjoys first position in the production of basmati rice and productivity in pearl millet and rapeseed and mustard. Major crops grown in the state include rice, wheat, pulses, cotton, sugarcane, pearl millet and rapeseed and mustard. The main horticultural crops of the state having good potential are cauliflower, onion, potato, tomato, chillies, guava and kinnow. The state is well known for Murrah buffaloes which are exported to other states of the country and even abroad.

Table 6: Summary of agro statistics

Sr. No	Components	Growth/production
1	Agriculture & allied GSVA at Current prices (FY2017)	Rs 95,620 Crore
2	Growth of Agriculture & allied GSVA (Constant Prices) (FY2017)	7%
3	Agricultural & allied sector's contribution in GSVA (FY 2017)	19.5%
4	Total food grains production (FY2018)	16.58 million tonnes*
5	Total wheat production (FY2018)	11,162 thousand tonnes*
6	Total cotton production (FY2018)	1,626 thousand tonnes
7	Total rice production (FY2018)	4,523 thousand tonnes*
8	Total oilseeds production (FY2018)	1,118 thousand tonnes*
9	Total sugarcane production (FY2018)	9,633 thousand tonnes*
10	Net area sown (FY2015)	3,522 thousand hectare
11	Area under Wheat (FY2016-17 ^{&})	2,558 thousand hectare
12	Area under Paddy (FY2016-17 ^{&})	1,386 thousand hectare
13	Area under Cotton (FY2016-17 ^{&})	570 thousand hectare

Source: PHD Research Bureau, compiled from various sources (Note: * 4th Advanced Estimates; & Provisional Estimates)





Progressive Haryana: Economic Profile

3. Economic Policy Environment

Haryana today has emerged as one of the most industrialized States in the country. The State has made impressive strides over the years to carve out a niche for itself in the fields of automobiles, electronic hardware, engineering, hi-technology industries, Information Technology, leather, and textiles. The State has been a leader in manufacture of a number of products like cars, footwear, scientific instruments, two-wheelers, tractors, etc.

3.1 Haryana Agri Business and Food Processing Policy 2018

Food processing industry has immense potential to contribute to India's growth story and create ample employment opportunities. The growth of food processing sector is essential to meet the twin objective of "inclusive growth" and "food security".

Haryana Agri-Business and Food Processing Policy 2018 endeavors to give a major boost to the Food processing industry in the state. Further by establishing efficient forward and backward linkages, it aims to create greater employment opportunities across the entire food value chain, thus promoting agriculture and rural prosperity. Food processing is the bridge between the industry and farming and the policy aims at doubling the farmer's income through large scale promotion of fresh produce of Haryana specially fruits, vegetables, milk and fish.

Chart 8: Main objectives of the Haryana Agri Business and Food Processing Policy 2018

To make Haryana a clear destination of choice for investments in Food processing sector	To promote value addition in Agriculture and allied sectors as Dairy, Horticulture, Livestock, Fishery and Poultry
To strengthen infrastructure by investing in Food Processing clusters thus developing strong and robust value chain	To Strengthen Farmer Producer Organizations through market linkages and capacity building initiatives
To promote farm-gate processing of Fresh Food specially fruits, vegetables, milk and fish	To promote start-ups in agri-business space; To enable the farmers to increase their income through new agro-marketing reforms
The industries to be set-up would work as Level changer, and the areas having sufficient production of a particular produce would be considered for the establishment of that kind of units in that particular area.	

Source: PHD Research Bureau, Compiled from Haryana Agri Business and Food Processing Policy 2018





Progressive Haryana: Economic Profile

3.2 Textile Policy 2017

The textile industry in Haryana exhibits strength across the entire value chain from fibre to fashion. The state is one of the leading cotton producers in the country with Bhiwani, Fatehabad, Hisar, Jind and Sirsa being the main cotton producing districts. This bounteous availability of raw materials gives Haryana a competitive advantage in the textile sector. The cluster based approach to industrial development has produced robust textile centres such as Panipat, Gurugram, Faridabad, Hisar and Sonapat. The sector today provides employment to approximately 1 million people with readymade garments worth USD 2 billion being exported from the state annually. The salient features of the policy are as under:

Table 7: Highlights of Haryana Textile Policy 2017

Vision	To establish Haryana as a preferred destination for textile manufacturing not only in India but also globally and to promote sustainable growth of the entire value chain.
Mission	<ul style="list-style-type: none"> To promote export of all type of textiles with special thrust on products such as garments, made ups, technical textiles etc. by creating a favorable ecosystem for the same. Foster a culture of excellence in research, innovation and entrepreneurship. To create world class training infrastructure in textile to nurture and develop the local talent to globally competitive standard.
Objective	<ul style="list-style-type: none"> To attract investment in the textile sector to the tune of Rs 5000 Cr. To generate 50000 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
Incentives	<ul style="list-style-type: none"> Interest Subsidy- Interest subsidy shall be given to all categories of textile enterprises, garments/ made-ups/knitting, ginning/ cotton spinning/dyeing, among others Capital subsidy @10% on the Eligible capital investment for new/expansion/diversification/modernization projects to all categories of textile enterprises across state 100% refund of stamp duty on purchase/ leasing of land for establishment of enterprise. Mandi Fees Exemption, Employment Generation Subsidy, Electricity Duty Exemption, among others
Infrastructure Augmentation	<ul style="list-style-type: none"> Support for Common Effluent Treatment Plant (CETP) International Quality Testing Centre at Panipat Setting up of a Sliver Plant, among others
Textile Parks/Clusters	Government will provide assistance to promoter/developer of the Textile Park with provision for at least 10 manufacturing enterprises for developing common infrastructure facilities.

Source: PHD Research Bureau, Compiled from Haryana Textile Policy 2017





Progressive Haryana: Economic Profile

Keen on making Haryana a global hub of textile manufacturing, and a preferred investment destination, the Haryana Government in February 2018 approved a new Textile Policy 2018 to incentivize setting up of new units, and ensure growth and modernization of the existing textile industry in the state. Given the thrust on textile development in the state and various incentives for the manufacturers, it is expected that the sector will grow at a CAGR of around 20-22% and create employment opportunities for more than 50,000, going forward.

3.3 IT & ESDM Policy 2017

The State government envisages next five years as a period for accelerating growth and all-round, inclusive development, especially by expanding opportunities for employment, entrepreneurship and empowerment. Haryana 'IT-ESDM Policy, 2017' targets an all-round development of the sector in the State by laying an equal emphasis on providing the right talent, smart infrastructure and conducive business climate.

Table 8: Highlights of Haryana IT & ESDM Policy 2017

Vision	To position Haryana as a pre-eminent investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation and technology, and skill development for nurturing entrepreneurship and generating employment opportunities
Mission	<ul style="list-style-type: none"> • Make Haryana a clear destination of choice for investments in IT and ESDM sector • Make IT and ESDM sector as the key enabler of equitable growth to spread prosperity and development across the State • Develop MSMEs as the growth engine of economy • Become recognized leaders in availability of high quality talent pool in the sector • Foster a culture of excellence in pioneering research, innovation and entrepreneurship.
Goals	<ul style="list-style-type: none"> • Attract investments of Rs. 20,222 crore in IT and ESDM sector • Employment of 1.2 lakh people in IT and ESDM sector in next 5 years • Increase IT and ESDM sector contribution to State's GDP from around 9% to 15% • Promote equitable development across the state with 25% increase in contribution of tier 2 and 3 cities to state workforce in the sector.
Fiscal Incentives under IT & ITeS	IT Industry shall be eligible for 100% reimbursement of stamp duty; 100% exemption for a period of 7 years from commercial operations; Property Tax on IT / ITeS units shall be at par with the industrial rates and further definition of IT /ITeS industry; 100% reimbursement (net tax) for a period of 10 years subject to maximum of 100% of Fixed Capital Investment , etc.
Fiscal Incentives under ESDM	State to provide 50% top up of Capex support provided by DEITY to units setting up in notified EMCs under M-SIPS of government of India; 100% reimbursement





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(net tax) subject to maximum of 100% of Fixed Capital Investment; 100% exemption for a period of 7 years from commercial operations; Mega projects shall be eligible for Special package of incentives over and above of the standard package for ESDM units shall be considered by the empowered committee on case to case basis, etc.

Source: PHD Research Bureau, Compiled from Haryana IT & ESDM Policy 2017

The fiscal incentives coupled with state government's focus on growth of the sector would go a long way in creating immense employment opportunities for the growing population, going forward.

3.4 Aerospace and Defence Policy 2016

The vision of Aerospace and Defence Policy 2016 of Haryana is to establish Haryana as the country's prominent aerospace and defence manufacturing hub and preferred MRO (Maintenance, Repair and Overhaul), FBO (Fixed Base Operator) destination of the Asian region.

Haryana is moving towards positioning itself as the country's leading Aerospace and Defence Manufacturing hub. The State has well-recognized manufacturing proficiency and state-of-the art infrastructure that can help in meeting India's critical need to be self-reliant in the sector.

The policy objectives are as follows:

- 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
- Attract investors to set-up Mega and Ultra-Mega Anchor units and thereby attract 10% by value of the orders in defence industry in India
- Attract investment of over INR 25,000 crores throughout the value-chain
- To create direct employment for 32,000 people by 2020
- To increase the share of industry in GSDP to 32% by leveraging the A&D sector
- To attract 50% by value of MRO activities of which market size in India is estimated to be around USD 700 million

The Haryana government came out with a draft Aerospace and Defence Policy 2017 in June 2017, to provide investors in the sector with an "enabling business eco-system" in the state. The policy would help Haryana in becoming a thriving aerospace and defence manufacturing hub, and provide strategic direction for development of the sector in the coming times.





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3.5 Entrepreneur and Startup Policy 2017

Haryana has given birth place to many successful business magnets and large industrial houses of India and is a home land of various new age entrepreneurs. Gurugram has evolved as a technology startup hub of India and has nurtured many successful startups, which now have become big brands. The Government of Haryana is keen to harness the potential of young entrepreneurs by providing the necessary policy push and maximum convergence by linking the policy with the larger perspectives of Government of India initiatives including Digital India, Make in India, Standup and Startup India and Skill India.

Chart 9: Summary of Entrepreneur and Startup Policy 2017

Vision	Objectives	Mission
<ul style="list-style-type: none"> To become a resourceful & inventive Start-up Hub of the country by supporting & assisting the new-age innovators and entrepreneurial talents across the State. 	<ul style="list-style-type: none"> Attract Rs. 1500 Crores investments into the Incubation and Startup Ecosystem in Haryana during policy period Establish at least 22 Technology /Business Incubators / Accelerators in each of the different sectors in every district of Haryana Develop 1 million sq. ft. of Incubation/ Common Office space Facilitate Venture Capital funding of a minimum of INR 200 Crore Encourage/Facilitate/Incubate at least 500 startup 	<ul style="list-style-type: none"> Establishing an IT Startup Hub in Gurugram. Build Incubation center in all part of State Creating a sustainable ecosystem of Innovation, R&D and Engineering in the state. Aligning Haryana with the 'Startup India' flagship initiative of the Government of India. Enhancing links between universities, research institutions and the business community. Promoting businesses that are aligned with a region's unique areas of opportunity

Source: PHD Research Bureau, Compiled from Entrepreneur and Startup Policy 2017





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Highlights of the policy:

- 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 USD4,656 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 USD 1.5 million dedicated to meet the funding requirement for scalability.
- Policy includes infrastructure augmentation in the form of developing training and plug and play infrastructure, formation of incubation centers and incubation center network and promote cyber security businesses.

3.6 New Integrated Licensing Policy-2016

New Integrated Licensing Policy-2016 came into effect by superseding the New Integrated Licensing Policy-2015 for Residential and Commercial Uses in Hyper/High Potential Zones to extend the benefits of this policy to the Medium and Low Potential Zones of the State of Haryana.

Salient objectives of the New Integrated Licensing Policy-2016 are:

- The policy aims to achieve the basic objective of optimum utilization of scarce and high priced land resource by rationalizing the existing parameters
- Integrated development of residential sectors.
- Dedicated land for EWS, LIG and middle income groups (affordable housing).
- Dedicated land for community facilities.
- Rationalization of fee and charges to generate additional revenue for the state exchequer.
- The policy further aims to accelerate the development of housing along with necessary social and physical infrastructure.
- To effectively check the lopsided provision of social infrastructure on account of proposed reduction in minimum area norms for grant of licence.





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Highlights of the policy:

- The policy intends to facilitate individual land owners whose land is located either within a residential sector or within the alignment of a sector road or sites/ areas designated for external development works within the development plan/ sectoral plan, for obtaining TDR (Transfer of Development Rights) certificates.
- This policy will be applicable in for the area available beyond 20% allowed for group housing in a residential sector as per existing policy. The licence for an integrated residential colony will be considered for minimum 25/15/10 acres of land in Hyper and High/Medium/Low Potential Zones respectively.
- The department can consider grant of licence for an additional area subsequent to grant of first licence.

3.7 Haryana Industrial and Investment Promotion Policy 2015

The Industrial Policy has been benchmarked against the best practices in other leading States in order to improve the 'Ease of Doing' Business in Haryana. The 'Make in India', 'Digital India' and 'Skilling India' campaigns launched by the Hon'ble Prime Minister of India forms the pervasive themes across all areas in the policy which embraces these landmark initiatives and reflect in the industrial growth strategy of the State.

Table 9: Summary of Haryana Industrial and Investment Promotion Policy 2015

Vision	To position Haryana as a pre-eminent Investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation & technology and skill development for nurturing entrepreneurship and generating employment opportunities
Mission	<ul style="list-style-type: none"> • Reposition Haryana as a "Preferred Destination" for doing business; • Facilitate State GDP growth rate in excess of 8%; • Employment generation for 4 lakh persons; • Investments into the State of Rs.1 lakh crore; • Increase contribution of secondary sector in the State GDP from 27% to 32% in tandem with the Government of India's National Manufacturing Policy and 'Make in India' initiative; • Promote balanced regional development through geographical dispersal of industry; • Increasing the competitiveness of the MSMEs through cluster development and adoption of "Zero Defect Zero Effect" manufacturing practices
Strategic Interventions	<ul style="list-style-type: none"> • Creating a pool of inexpensive land bank and support infrastructure for the Industry and Investor Facilitation; • Putting in place a Business friendly regulatory system which supports Ease of Doing Business;





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	<ul style="list-style-type: none"> • Revitalizing the Industrialization in the State through specific interventions. • Promoting labour Intensive and employment generating industries like Textiles, Agro processing etc.; • Generating inclusive economic development through geographical dispersal of Industry; • Bringing in labour reforms to match the aspirations of the industry and the labour; • Initiating skill development programs in collaboration with the Industry; • Leveraging Central Government Schemes for building and upgrading infrastructure; • Encouraging adoption of green, clean energy business practices and technologies;
Other Highlights	<ul style="list-style-type: none"> • Thrust Areas have been identified based on competitive strength/advantages of the State - geographical location, available resources and skill-base, raw material availability, existing manufacturing practices and expertise, and; growth potential and Sunrise area offering new growth opportunities. • Mega Project/Mother Units – land on lease to projects which support ancillarization or employment generation, use green technologies or use of local raw material, involving Hi-tech manufacturing and requiring lesser space like Electronics etc.; • Industry by Invitation – Fortune 500 companies/large Corporates/MNCs would be invited to set up projects in the State;
MSMEs	<ul style="list-style-type: none"> • Leveraging all the Schemes of Ministry of MSMEs - Easier exit mechanism for MSMEs, Mudra Bank for financial support to the MSMEs, etc; • Focus on Cluster development – More clusters planned for Food, Leather, Textile, IT/ITES, Plywood, Metal/utensils etc. • MSME Parks on Panchayat lands – Small sized Plots/Flatted Factories with plug & play facilities on lease basis; • Fiscal Incentives; • Creation of Rs.1,000 crore corpus under Credit Guarantee Fund Trust For Micro And Small Enterprises for collateral free loans;
Environment Related Reforms	<ul style="list-style-type: none"> • Inspections – reduced periodicity, once in 5 years and/or Inspections by exception with prior intimation duly authorized by top Authority – report with 72 hours; • Increased periodicity for approvals – Red (5 years), Amber (10 years) & Green (life time); • Categorization/norms as per CPCB; • Online filing of returns through a single form under all Acts; • Self-certification and third party verifications through private agencies/colleges etc.





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Other Areas of Focus under Industrial Policy	<ul style="list-style-type: none">• Labor Reforms• Enhancing Skill Levels and Employability• Promoting Green Initiatives and Technologies• Infrastructure and Industrial Estate/Parks Development• Export Promotion• Estate Management Procedures, among others.
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Source: PHD Research Bureau, Compiled from Industrial Policy of Haryana 2015

3.8 Haryana Sports and Physical Fitness Policy 2015

The vision for the Policy is to have, by 2020: "A dynamic and innovative culture that promotes and celebrates participation and excellence in sports."

Implicit in the vision is the notion that Haryana is a leading sports hub where all Haryana residents can pursue sports to the extent of their abilities and interests, including performing at the highest competitive levels; and where sports delivers benefits for increasing numbers, to individual health and well-being, and contributes to socio-economic outcomes.

Goals of the Policy:

- Introduction to Sport: citizens to have the fundamental skills, knowledge and attitudes to participate in organized and unorganized sports.
- Recreational Sport: citizens to have the opportunity to participate in sports for fun, health, social interaction and relaxation.
- Competitive Sport: citizens to have the opportunity to systematically improve and measure their performance against others in competition in a safe and ethical manner.
- High Performance Sport: athletes to achieve world-class results at the highest levels of international competition through fair and ethical means.
- Sports for Development: Sports is used as a tool for social and economic development, and the promotion of positive values at home and abroad.

Objectives of the policy:

- Educators, parents and community support the development of physical literacy and safe, healthy, values-based play and sports among children and youth.
- Opportunities are provided for persons from traditionally underrepresented and/or marginalized populations to actively engage in all aspects of sports participation.
- Partnerships among sports and other sectors deliver quality age and stage-appropriate programs to an increasing number of participants.
- Programming is accessible, equitable and inclusive to meet the needs, motivation and interests of participants in a fun and safe experience.





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- Children and youth have access to safe and appropriate spaces for unstructured play and self-organized sports.
- Educators increase the opportunities for children to learn and practice the fundamentals of sports.

Role of the Government:

The focus points of the state government are: providing support for participation and volunteerism, athlete development, coaching and coach education, training of officials, and high performance sports through state sports organizations and national and regional sports centres and academies. Government of Haryana provides support to hosting organisations of districts, state and national games, as well as international events. The state government is committed to enhancing access for traditionally underrepresented and/or marginalized populations, promoting sports and its values within its jurisdictions, and working with the Central Government and to coordinate policy and programs.

3.9 Enterprise Promotion Policy 2015

The State has taken lead in terms of planned Industrial and Urban growth which has resulted in development of vibrant urban and industrial complexes close to the National Capital. However, a large part of the State away from National Capital did not experience similar growth in urban and industrial areas. It is envisioned that this policy would catalyse Haryana's Position as a pre-eminent Investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation and technology, and skill development for nurturing entrepreneurship and generating employment opportunities. The Policy envisages generating investments of more than Rs.1 lakh crore and providing employment to in excess of 4 lakh.

Table 10: Highlights of Enterprise Promotion Policy 2015

Vision	"To position Haryana as a pre-eminent Investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation and technology, and skill development for nurturing entrepreneurship and generating employment opportunities"."
Mission	<ul style="list-style-type: none"> • Facilitate State GDP growth rate in excess of 8%; • Employment generation for 4 lakh persons; • Investments into the State of Rs.1 lakh crore; • Increase contribution of secondary sector in the State GDP from 27% to 32% in tandem with • the Government of India's National Manufacturing Policy and 'Make in India' initiative; • Promote balanced regional development through geographical dispersal of industry;





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	<ul style="list-style-type: none"> Increasing the competitiveness of the MSMEs through cluster development and adoption of "Zero Defect Zero Effect" manufacturing practices.
Ease of Doing Business	<ul style="list-style-type: none"> Implementation Mechanism Project Clearance Mechanism No Change of Land Use/ Auto – Change of Land Use Simplified Estate Management Procedures Service Guarantee/ Deemed Clearance Integration with e-Biz Portal (Labor and Environmental Reforms) Constitution of a Disputes Settlement Committee to decide the structure, process & mechanism to settle existing disputes/litigations pertaining to various Departments One Stop clearance within 2 months for project by Empowered Executive Committee, housed in Chief Minister's office and by a Committee headed by Deputy Commissioner. 119 Services related to industrial activities under the Right to Service Act. No CLU/NOC required in 31 Blocks Automatic CLU in 75 Blocks Liberalisation and simplification of Estate Management Procedure Private Industrial Parks with Mixed Land Use
Making Enterprise Competitive	<ul style="list-style-type: none"> Minimizing Cost of doing Business through No Enhancement in plots allotted by HSIIDC, incentive amounting to 1000 Cr for industrialization and special assistance of 100 Cr for critical infrastructure Enhancing Productivity through Haryana Skill Development Mission HSDM, Setting up Skill Development university, Institutes for Training and Virtual Employment Exchange Support to ESDM/IT/ITES through innovation campus, Mobile Application Development Centre, Rural BPO's in University Towns and leveraging on federal Governments Digital India initiative
Facilitating Balanced Regional Development	<ul style="list-style-type: none"> Incentives led geographical dispersal: Identification and Disbursement of India wide best incentive for D Category Blocks & Thrust Areas/ Focus Sectors State industrial corridors: Leveraging the dedicated freight corridor Establish Group/ Cooperatives/ Society in each District for set up manufacturing units. Development of Ultra Mega/Iconic Projects through Special Incentives
Supporting the MSME Sector	<ul style="list-style-type: none"> Development of Clusters- Traditional Clusters, Thrust Areas/Focus Sector and Rural Functional Clusters Creation of MSME fund with corpus of Rs 1000 Crore to assist entrepreneur with collateral free debt upto Rs. 1 Crore Infrastructure support and incentives of Rs. 1000 Crore Power Tariff Subsidy, among others



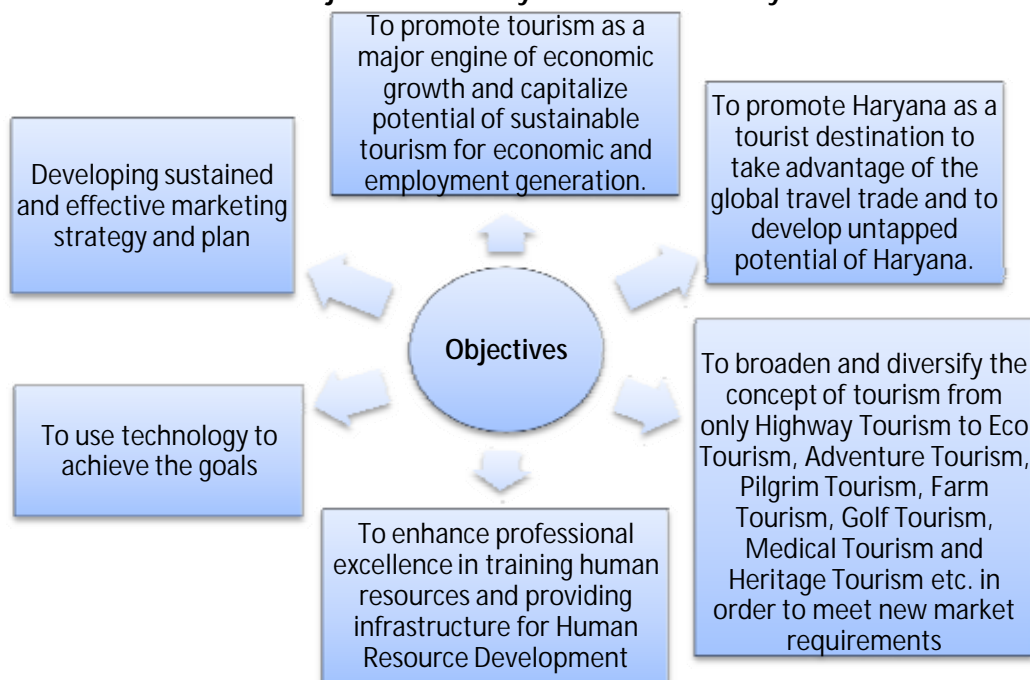


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3.10 Tourism Policy 2008

Haryana has immense possibilities of growth in the Tourism sector with its varied attractions. The State aims to harness the direct and multiplier effects of tourism in employment generation, poverty alleviation and women empowerment in an environmentally sustainable manner. The State proposes to reposition itself as most preferred destination by maximizing productivity of Haryana's cultural, human, natural and technical resources.

Chart 10: Objectives of Haryana Tourism Policy 2008



Source: PHD Research Bureau, Compiled from Tourism Policy 2008

Facilitating the Role of Private Sector:

- The Tourism Policy also provides that the concessions available to the industry in the industrially backward blocks will also be available to the hotels/tourism projects.
- The Policy seeks to include Thanesar, Pehowa, Jagadhri, Panipat, Hisar, Bhiwani and Rewari blocks of the State and the said incentives will also be available to the tourism/hotel projects in these blocks.

The eligibility norms and the details of incentives proposed to be given to hotel/tourism projects have been specifically mentioned in the policy in which the projects of hotels (3 star and above), amusement parks/recreational parks/theme parks, golf courses, adventure tourism, multiplexes and malls and heritage hotels will be eligible for the concessions/incentives.





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3.11 MSMEs in Haryana

On the industrial front, Haryana is an emerging manufacturing hub for Indian economy having immense scope for the development of the micro, small and medium enterprises (MSMEs) sector. MSMEs sector of the state has potential to drive growth of manufacturing sector and boost employment in the state. There are 9.7 Lakhs MSMEs in Haryana that constitute 1.5% of the MSMEs in all over India. The state has presence of many manufacturing clusters in the cities of Ambala, Panipat, Karnal, Kaithal, Yamunanagar, Sonapat, Rohtak among others which has boosted industries such as IT, textiles, food and handlooms.

	Micro	Small	Medium	Total MSME
Haryana	9.5	0.2	0	9.7
All India	630.5	3.3	0.1	633.9
Share of Haryana MSME in All India	1.5%	5.1%	0	1.5%

Source: Compiled by PHD Research Bureau, Annual report of MSMEs 2017-18 (State-wise Distribution Estimated Number of MSME (NSS 73rd Round, Annexure-I)) [Note: The figures are as per the National Sample Survey (NSS) 73rd round, conducted by National Sample Survey Office, Ministry of Statistics & Programme Implementation during the period 2015-16]

MSMEs are complementary to large industries as ancillary units. Therefore, Government of Haryana has placed strong focus on the development of this sector.

3.12 Services Sector in Haryana

During the last decade, the services sector of the state has performed significantly and emerged to be as a major contributor to the economic growth of Haryana. Services sector of the state has marked an impressive growth (at constant prices) of about 10.8% during FY2017. The contribution of services sector in GSDP (current prices) of Haryana stands around 50% during FY2017. The services sector accounted for a major share in FDI followed by real estate & electricity.

Areas under focus in services sector:

- Government to give equal importance to the Services Sector
- Design and develop Services led growth strategy focusing on Health, Education, IT, Tourism, Logistics, Bulk Courier Services, knowledge based and Non Polluting Services, Sports etc.
- These sectors to be accorded the Status of Industry for the purpose of incentives and electricity tariffs;
- Focus on promoting Incubation Centres for supporting the Service Sector.





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3.12.1 Ease of Doing Business in Haryana

According to the Business Reform Action Plan (BRAP) rankings for 2017-18, Haryana ranked 3rd in terms of ease of doing business⁴. Recently, on December 20th, 2018, the Department of Industrial Policy and Promotion (DIPP) announced results of the first ever States' Start-up Ranking 2018 in which Haryana emerged among the 'Aspiring Leaders'.

Table 12: State-wise Business Implementation Reform

S. NO.	State	Rank	Score (%)
1.	Andhra Pradesh	1	98.30
2.	Telangana	2	98.28
3.	Haryana	3	98.06
4.	Jharkhand	4	98.05
5.	Gujarat	5	97.99
6.	Chhatisgarh	6	97.31
7.	Madhya Pradesh	7	97.30
8.	Karnataka	8	96.42
9.	Rajasthan	9	95.70
10.	West Bengal	10	94.59
11.	Uttarakhand	11	94.24
12.	Uttar Pradesh	12	92.89
13.	Maharashtra	13	92.88
14.	Odisha	14	92.08
15.	Tamil Nadu	15	90.68
16.	Himachal Pradesh	16	87.90
17.	Assam	17	84.75
18.	Bihar	18	81.91
19.	Goa	19	57.34
20.	Punjab	20	54.36
21.	Kerala	21	44.82
22.	Jammu & Kashmir	22	32.76
23.	Delhi	23	31.69
24.	Daman & Diu	24	28.69
25.	Tripura	25	22.45
26.	Dadra Nagar & Haveli	26	21.88
27.	Puducherry	27	15.65
28.	Nagaland	28	14.16
29.	Chandigarh	29	11.54
30.	Mizoram	30	3.66
31.	Andaman & Nicobar Islands	31	1.25

⁴ Business reform action plan, Department of industrial Policy and Promotion, Ministry of Commerce and Industry, Government of India





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32.	Manipur	32	0.27
33.	Sikkim	33	0.14
34.	Arunachal Pradesh	34	0.00
35.	Lakshadweep	34	0.00
36.	Meghalaya	34	0.00

Source: PHD Research Bureau compiled from the Department of Industrial Policy and Promotion, Government of India as on 5th January 2019

The state has taken many initiatives for improving the Business Environment - Ease of Doing Business, such as:

- Online and time bound approvals under the same roof/cloud – through empowered CEO to be housed in the Chief Minister’s Office;
- Concurrent powers of 10 Departments to the CEO under the Industrial Promotion Act 2005 for project having investment in plant and machinery (criteria as per MSME Act) above Rs.1 crore and CLU (Change of Land Use) of land above 1 acre;
- All project related approvals in 2 phases within 2 months ;
- Time bound clearances with provision of deemed approvals under Clause 11 of IPA;
- 34 Services relating to Industries Department notified under Right to Service Act;
- 30 services to be delivered through the e-biz portal;
- For project having investment in plant and machinery (criteria as per MSME Act) upto Rs.1 crore and CLU of land upto 1 acre as per TandCP norms, power with the DCs under Industrial Promotion Act 2005;
- Strengthening of the Investment Promotion Center;
- Creation of Foreign Investment Promotion Board;
- District Facilitation Centers – to support the industry and troubleshooting;
- Relationship Managers for handholding the Mega Projects.

The Government is committed to ensure ease-of-doing-business and facilitate industry from the point of view of labour related regulations and clearances.

Table 13: Few initiatives for facilitating Ease of Doing Business in Haryana

1	Web-enabling of services	IT Plan has been approved which consists of web-enabling of several other services under various Labour Laws. It also provides for on-line filing of returns under various labour laws and transparent inspection schemes etc.
2	Streamlining the process of inspections of the units	Inspections of the units will be undertaken only with the approval of the head of the department(s) and after prior intimation, unless otherwise warranted. Normally, not more than 20 percent of the units shall be picked





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		randomly for inspection in a year which shall be carried out only once regarding implementation of all the applicable laws.
3	Filing of Statutory Returns through on-line mode	There are about 12 central labour laws under which statutory returns have to be filed by the employers every year. The Ministry of Labour, Government of India has already combined all these returns into one and notified it. The State Government would enable and implement these norms through on-line mode expeditiously
4	Certification of factory building plans	The process of certification of factory building plans prescribed under the Factories Act, 1948, have been streamlined and powers decentralized. The plans for NCR region are approved locally at the level of Additional Labour Commissioner, Gurugram and for the rest of the State at the Head Office.
5	Creation of Virtual Employment Exchanges for labour sourcing	Creation of Virtual Employment Exchanges for labour sourcing under PPP Model or any other suitable model would be considered
6	Increase in coverage limit for small industries under Factories Act, 1948, Among others	The draft of Small Industries Conditions of Service Bill has already been finalized by the Ministry of Labour, Government of India and is under consideration for further approvals. This law would provide for raising the limit of number of workers to 40 for exemption from coverage under Factories Act, 1948. The State Government would be prompt in implementing the provisions after its approval for benefit of small industries.

Source: PHD Research Bureau compiled from Industrial Policy of Haryana 2015





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3.13 Banking

Banks are a significant indicator of the industrial and social development of any economy. Over the years the total number of Commercial Banks (CBs) and Regional Rural Banks (RRBs) working in Haryana has increased from about 4025 as on September 2014 to 4708 as on September 2017.

Table 14: Banking in Haryana (as of September end)

	2014-15	2016-17
Deposit (Rs Crore)	2,03,698	3,19,469
Credit (Rs Crore)	1,65,349	2,10,193
CD Ratio (%)	81%	66%

Source: PHD Research Bureau compiled from Economic Survey of Haryana

The total deposits of commercial banks and regional rural banks have grown from Rs 2,03,698 crore in September 2014 to Rs 3,19,469 crore in September 2017. Further, the state has also observed an increase in the total advances. The total advances in the state have increased from Rs 1,65,349 crore in September 2014 to Rs 2,10,193 crore in September 2017. CD Ratio in September 2014 was 81%, which reached to 66% in September 2017.

Table 15: Thrust Areas of Haryana

Water Management	<ul style="list-style-type: none"> • Water management is a thrust area not only for the State Agriculture and Farmers Welfare Department but also a very critical need to the Nation. • Major thrust has been given for the promotion of Water Saving Technologies under “On farm Water Management” programme. • The department is providing assistance to farmers for laying of Under Ground Pipe Line System, Sprinkler Irrigation System and Drip Irrigation System in cotton and sugarcane crops
Automobile and Auto Component	<ul style="list-style-type: none"> • Haryana is one of India’s largest automobile hubs. • The state manufactures 80% of excavators, 52% of cranes, 50% of cars and 33% of two-wheelers in India. • Due to existing forward and backward linkages with several segments of automotive industry, 50 of 250 large OEMs in India are located in Haryana. • The role of the General Engineering sector is very important if the State has to capture the entire value chain of the automobile, aero-space, petro-chemicals, domestic appliances, and paper and textile sectors. This sector has the potential to provide the supply chain to the other thrust area sectors.





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<p>IT and IT Enabled Services (ITES)</p>	<ul style="list-style-type: none"> IT sector in Haryana contributes significantly to the state's GDP and state's export. Haryana is the third-largest exporter of software and one of the preferred destinations for IT/ITeS facilities. Electronics and IT exports from Haryana in 2016-17 were over 6% of national exports. The state employs over 2,00,000 people in this sector and is a world BPO hub, with 5% of worldwide and 13% of Indian BPO employees coming from Gurugram.
<p>Textiles</p>	<ul style="list-style-type: none"> Haryana is the one of the largest producer of cotton in the country. Abundant availability of raw materials gives Haryana a competitive advantage in the textile sector The state exports readymade garments worth USD1.3 billion each year. A cluster of high-fashion readymade garment units has come up in the well-developed industrial area of Udyog Vihar, Gurugram The textile sector in Haryana employs around 1 million workers. The handloom business is expected to receive a further boost with the establishment of the proposed International Trade and Convention Centre in Panipat. A Textile Incubation Center at Panipat has already been approved by the Ministry of Textiles. HSIIDC has filed an application for setting up a Textile Park at Panipat under the SITP Scheme over an area of about 85 acres. An International Trade and Convention Centre is also being developed at Panipat to promote handloom products.
<p>Renewable Energy</p>	<ul style="list-style-type: none"> Haryana has installed rooftop projects of 70 MW so far and plans to add to 22.5 MW during 2017. It is one of the few states in India to have achieved 100% rural electrification. The state aims to set up solar power projects of more than 4000 MW and achieve a target of 1.6 GW of solar rooftop capacity by 2022. The state government has proposed to set up around 3,055 solar water pumping systems in the state during 2017-18.





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<p>Agro and Food-Processing Industry</p>	<ul style="list-style-type: none">• Agriculture is one of the biggest employment generators in rural Haryana, with strong potential in value addition and exports.• Haryana aggressively promotes organic farming; financial assistance is provided to farmers for production and use of vermicompos.• In November 2017, at World Food India 2017, the state government signed pacts worth US\$ 321 million with 44 agro-based and food processing companies that will provide employment to 5,012 persons.• The State has some good agro-processing industries, mostly in and around cities. However, rural based low cost small scale agro-industries in the State are required for process able surpluses. These would not only help in reducing the post-harvest losses but would also generate much needed rural employment opportunities.
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Source: PHD Research Bureau compiled from various sources





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4. Infrastructure

Infrastructure is an important growth driver and its development is essential for long term growth prospects of an economy. Quality infrastructure is a prerequisite for the development of all sectors of states' economy. Haryana has also focused on providing better and modernised infrastructural facilities in the state. In order to build a strong infrastructure base in the state, participation of private sector is highly encouraged by the state government through public private partnerships (PPP).

4.1 Roads- Roads are the major mode of transportation services available in Haryana. The state has 2741 km of national highways, 1801 km of state highways, 1395 km of major district roads and other RCD roads of 20,430 km. Under State Budget 2018-19, 4.73% of the total expenditure was allocated to roads and bridges. The Kundli-Manesar-Palwal Expressway was inaugurated in November 2018. Haryana is among the states having almost 100 per cent connectivity to rural areas with metalled roads. Further, in order to further strengthen the road network and making it more efficient as per traffic requirements, the main emphasis has been laid on the improvement/up-gradation of existing road network, construction of bye passes, bridges/ROBs and completion of road construction works.

Table 16: Road infrastructure in Haryana

Category of road	Length in Kms
National Highways	2,741
State Highways	1,801
Major district roads	1,395
Other RCD Road	20,430

Source: PHD Research Bureau, Compiled from IBEF (Note: Data till December 2017)

4.2 Railways - Railways have an important role to play in promoting the development of Haryana. As of March 2016, Haryana had a 1,710.5 km long rail route. Kalka, Kurukshetra, Rohtak, Jind, Hisar, Ambala, Panipat, Gurgaon and Jakhhal are some of the important railway stations. 160 km of new railway lines has been constructed in Haryana over the period of 2014-18 (upto June 2018), out of 2574 km of new railway lines constructed in India as a whole during the same period. A new high speed rail network between Delhi and Haryana was approved in June 2018 with work on it expected to be started by March 2019.

Ministry of Railways has planned to set up a new joint venture between the Haryana government and Railways for upgradation of railway stations and strengthening infrastructure in the state. Railways has also signed a MOU with Haryana government regarding the plantation of saplings on vacant land on both sides of railway lines.



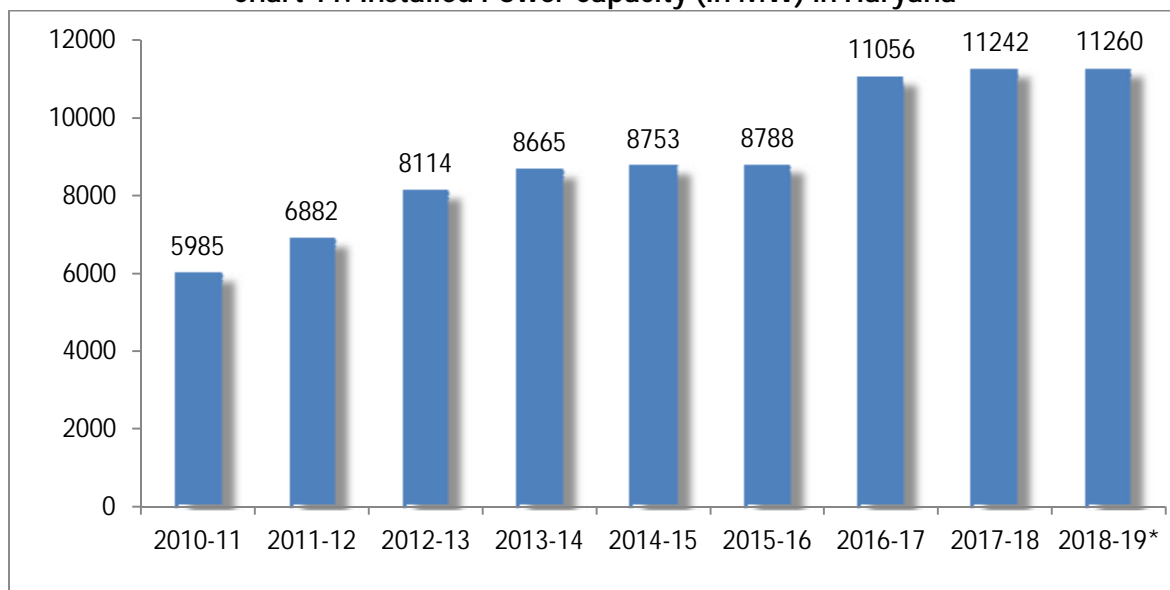


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4.3 Aviation-There is a domestic airport at Chandigarh and civil aerodromes at Pinjore, Karnal, Hissar, Bhiwani and Narnaul. The state has a total of eight airports, which includes both operational and nonoperational airports Civil Aviation Department, Haryana has 5 Airstrips in the State at Pinjore, Karnal, Hisar, Bhiwani and Narnaul. Three Flying Training Centres of Haryana Institute of Civil Aviation are established to provide flying training to people at Hisar, Karnal and Pinjore. In September 2015, a new terminal at Chandigarh airport was inaugurated. The terminal is capable of handling both domestic and international flights

4.4 Power – Perennial supply of power is significant in order to achieve sustained economic growth. Although Haryana has limited availability of natural sources of energy, however, the state has taken several initiatives in this regard. As of November 2018, Haryana had a total installed power generation capacity of 11,260 MW; of which, 4,628 MW by the private sector, 4,032 MW was contributed by the state and 2,600 MW by the central sector.

Chart 11: Installed Power Capacity (In MW) in Haryana



Source: PHD Research Bureau, Compiled from IBEF (Note: *data is upto November 2018)

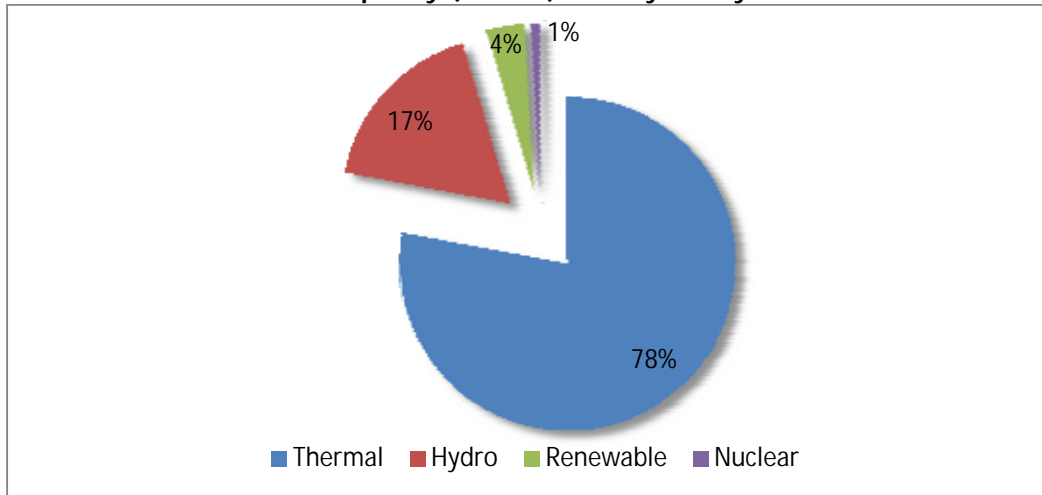
Under State Budget 2018-19, Rs. 15,372.16 crore was allocated for power department and Rs. 112.85 crore for non-conventional energy department. The main four sources of installed power capacity in Haryana are hydro, nuclear, renewable and thermal. The major is held by thermal, which occupied a share of 78%, followed by hydro source, which held 17% share, renewable (4%) and nuclear (1%).





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Chart 12: Installed Power Capacity (In MW) in Haryana by Source, November 2018



Source: PHD Research Bureau, Compiled from IBEF

The total number of electricity consumers in the state increased from 35,44,380 in 2001-02 to 59,40,158 in 2016-17. The per capita consumption of electricity increased from 57 units in 1967-68 to 1628 units in 2015-16. Considering the need for maximizing power availability in the State, various short term and long term measures such as addition in capacity generation, improvement in operational efficiency, rehabilitation and extension of distribution network etc. have been taken up.

4.6 Urban Infrastructure- Haryana is highly committed to provide urban infrastructure services in the state as more than 34.8%⁵ of state's population lives in urban areas. The state government endeavours to improve connectivity of its towns with National Capital of Delhi in order to facilitate smooth and uninterrupted flow of goods and passengers both within the urban centres in the state as well as with National Capital of Delhi.

The state government has provided an impetus and would continue to upscale 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 and 50 municipal committees.

Under State Budget 2018-19, Rs 5,626.84 crore has been allocated for urban development. As per guidelines of Ministry of Urban Development, 100 Cities in the country are to be developed as smart city in various phases. The center and state government has started various schemes and missions which have benefited in the urban development of Haryana, such as Rajiv Gandhi Urban Development Mission, Swachh Bharat Mission, Atal Mission for Rejuvenation and Urban Transformation, Deen Dayal Upadhyaya Sewa Basti Utthaan, among others.

⁵Census 2011





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4.7 Telecom-According to the Telecom Regulatory Authority of India, Haryana had 27.47 million wireless subscribers and 284,253 wireline subscribers, as of November 2018. The number of internet subscribers in the state as of September 2018 stood at 13.58 million. Moreover, the state of Haryana had a tele-density of 97.4% as of October 2018.

The Department of Telecommunications initiated a project in 2011, the National Optical Fibre Network (NOFN), with an aim of providing broadband services to 2,50,000 gram panchayats across the country. Haryana government has rolled out a new Communication and Connectivity Policy to provide a major push to telecom and communication infrastructure in the state, in consultation with telecom power companies. By February 2019, 6,123 gram panchayats have been connected through optical fibre under Bharat net.



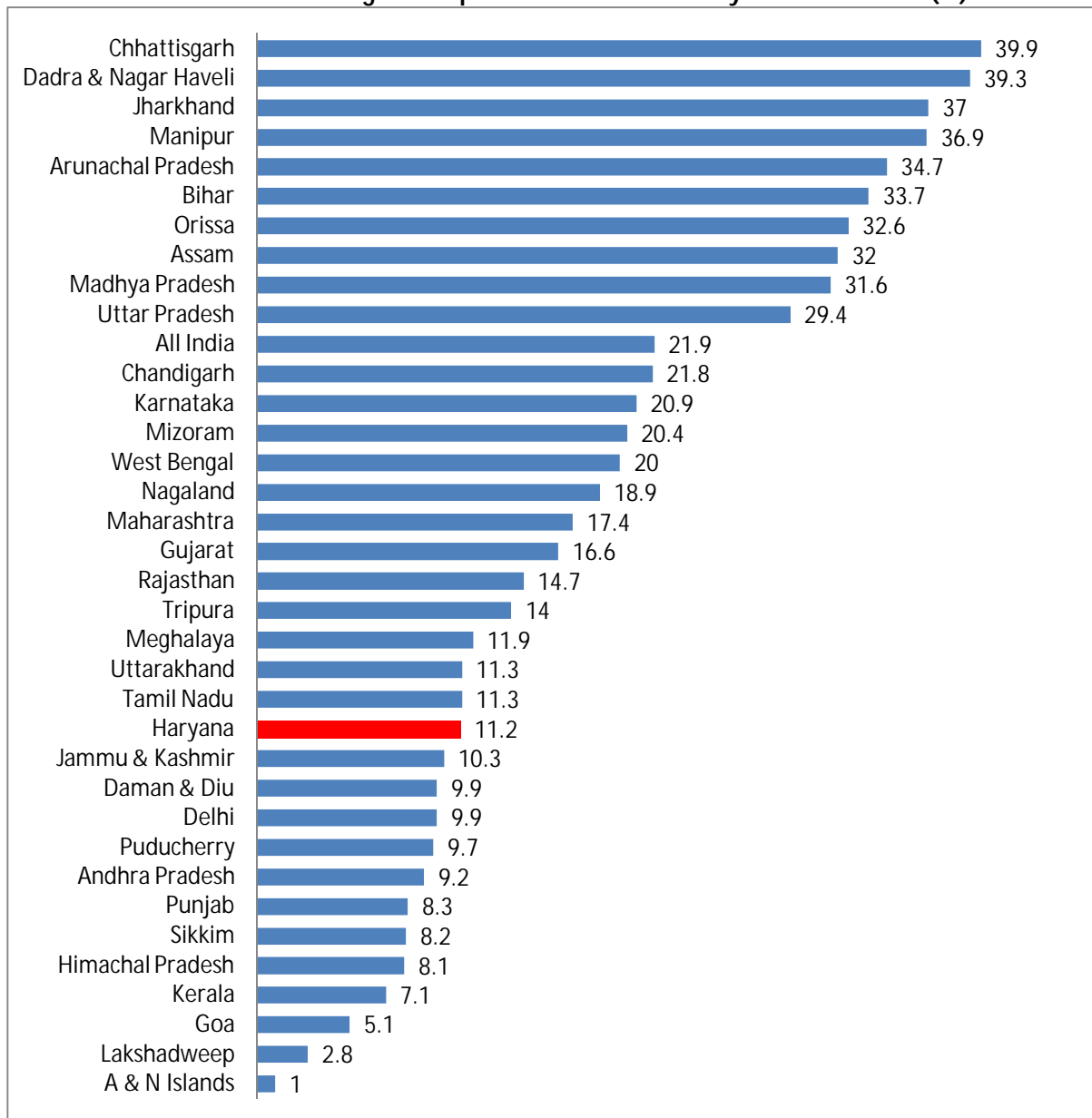


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5. Social Infrastructure

Poverty– It is encouraging to note that the state of Haryana has been able to significantly reduce its poverty numbers during the last few years. The percentage of population below poverty line of the Haryana has declined by around 3 percentage points from 14% in 2004-05 to 11.2% in 2011-12.

Chart 13: Percentage of Population below Poverty Line – 2011-12 (%)



Source: PHD Research Bureau, compiled from Planning Commission (Report of the Expert Group, 2014) Note: Data for 2011-12

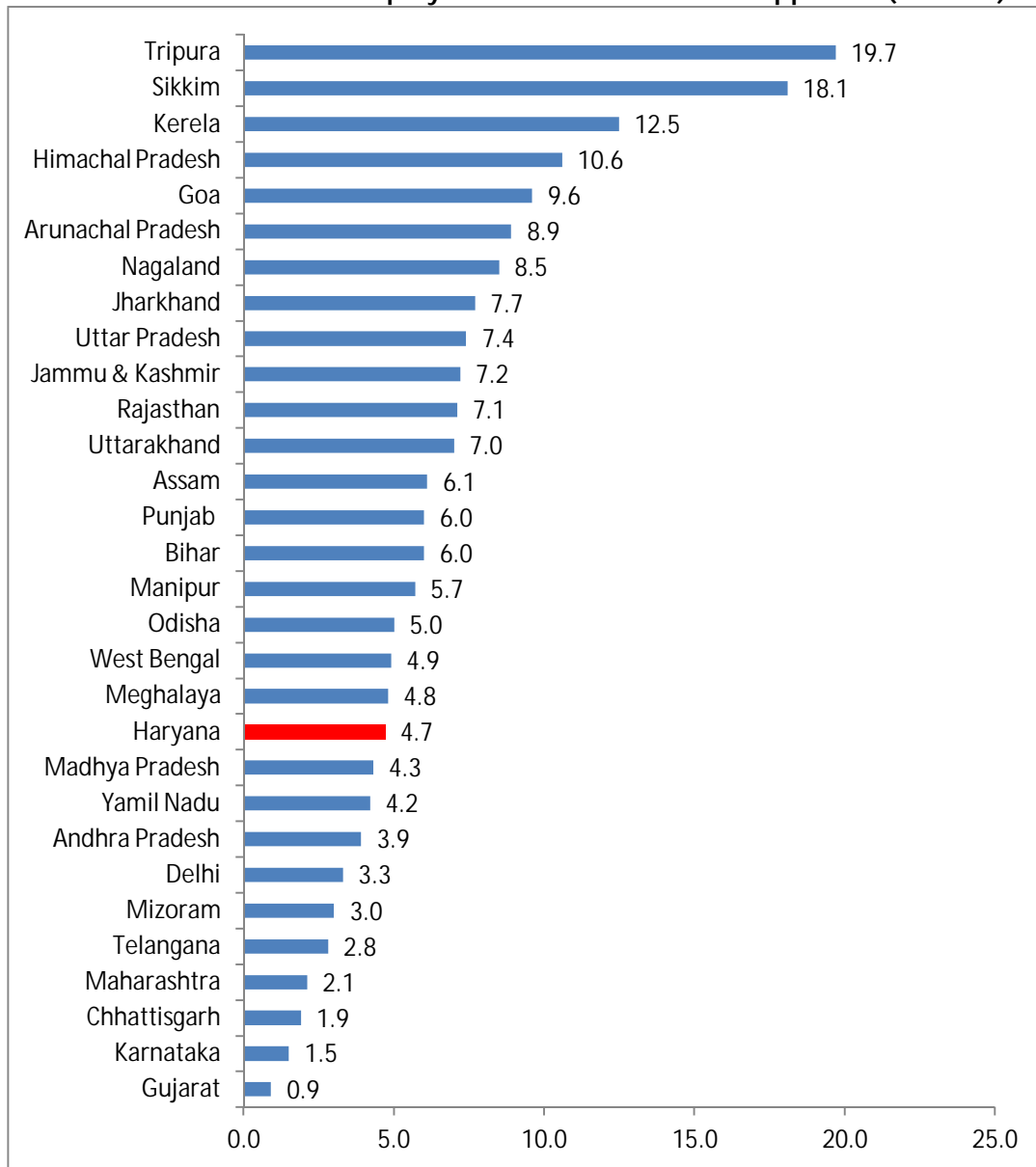




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Unemployment– The unemployment rate based on the usual principal status for the state was estimated at 4.7% as compared to the All India level which was about 5% during the period 2015-16.

Chart 14: State wise Unemployment rate based on UPS approach (2015-16)



Source: PHD Research Bureau, compiled from Annual Report on Employment & Unemployment Survey (2015-16), Ministry of Labour & Employment, Government of India

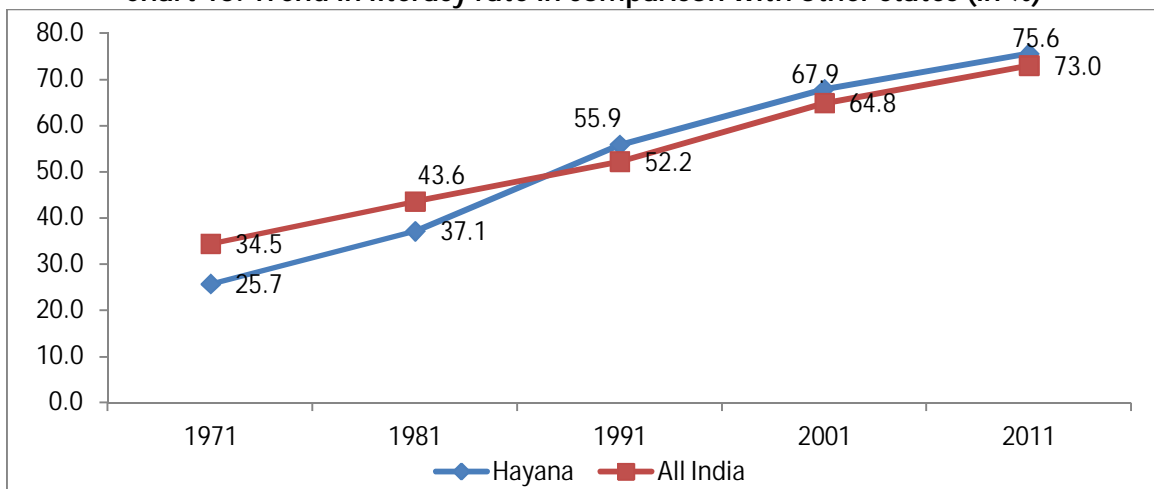




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Education– Education plays an important role in enhancing the capability of the people and in promoting human resource development. The state of Haryana is committed to provide education to all. The concerted efforts of the government have resulted in the state to increase its literacy rate significantly over the years. The state’s literacy rate has increased significantly from around 34.5% in 1971 to around 43.6% in 1981, 67.9% in 2001 and about 75.6% in 2011.

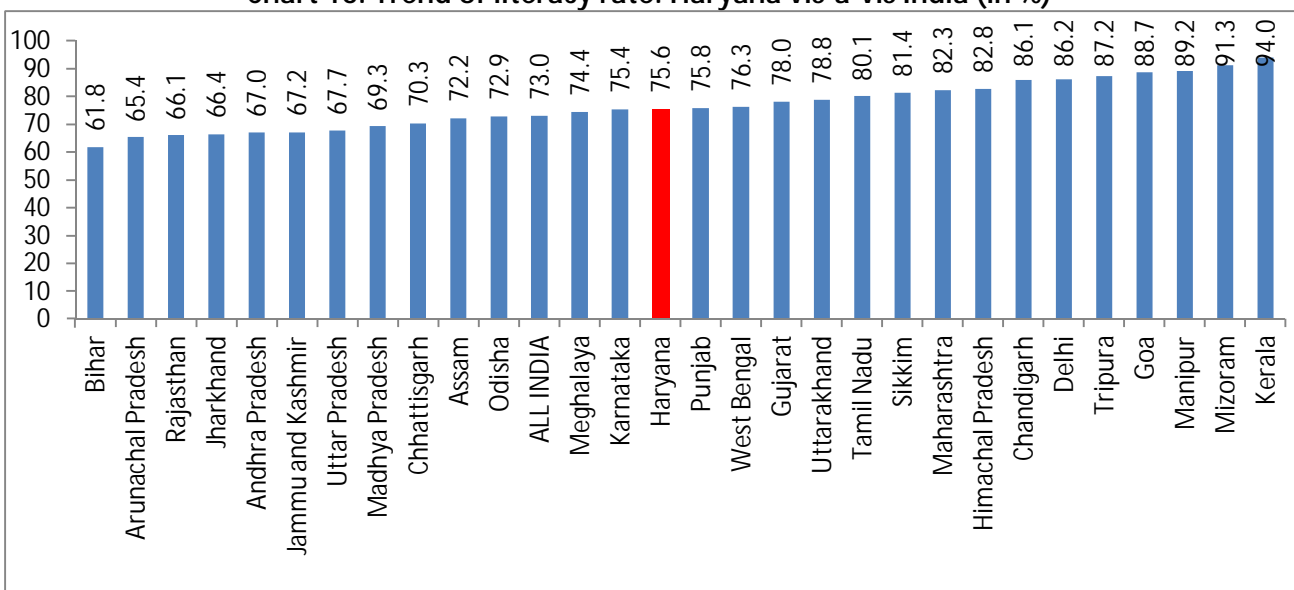
Chart 15: Trend in literacy rate in comparison with other states (in %)



Source: PHD Research Bureau, compiled from RBI

The state has a literacy rate of 75.6% which is higher than the All India average of 73% and also higher than the states such as Karnataka, Meghalaya, Assam, Madhya Pradesh, Uttar Pradesh, among others.

Chart 16: Trend of literacy rate: Haryana vis-à-vis India (in %)



Source: PHD Research Bureau, compiled from RBI, Economic Survey 2017-18





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Health—Government of Haryana is committed to provide quality health care to its all citizens. The Health Department has been constantly upgrading itself in terms of infrastructure, human resources, equipments, drugs etc. Health Department in the State is responding to the health needs of all categories of its populace including infants, children, adolescents, mothers, eligible couples and the elderly in addition to the sick and trauma victims. Also, there is a constant endeavour to keep communicable and non-communicable diseases in check and to have strong systems of recording, reporting and planning.

As per state's Economic Survey 2017-18, the state government is providing services through 60 hospitals, 124 Community Health Centres, 500 Primary Health Centres and 2,630 Sub-Health Centres. Under 'Mukhya Mantri Muft Ilaj Yojana' seven types of medical services are being provided for free in Haryana.

Government has allocated Rs 4,769.61 crore (US\$ 740.05 million) (for health and family welfare in State Budget 2018-19. Further, the state government has also decided to set up an AYUSH University as well as AYUSH Cell across every PHC of the state.

Table 17: Status of health indicators of Haryana and India

Indicators	Haryana	India
Population	27.4 Million	1.21 Billion
Female Literacy Rate	65.9	64.6
Sex-ratio (Female per 1000 male)	879	943
Birth Rate	20.7	20.4
Death Rate	5.9	6.4
Infant Mortality Rate (Per Thousand)	33	34
Maternal Mortality Ratio	146	178

Source: PHD Research Bureau, compiled from RBI and Economic Survey, Haryana 2017-18.

The infant mortality rate of Haryana has improved over the years. Infant mortality rate of Haryana is 33 which is below national average of 34. It is better than many other states like Bihar, Chhattisgarh, Rajasthan, Assam, etc.



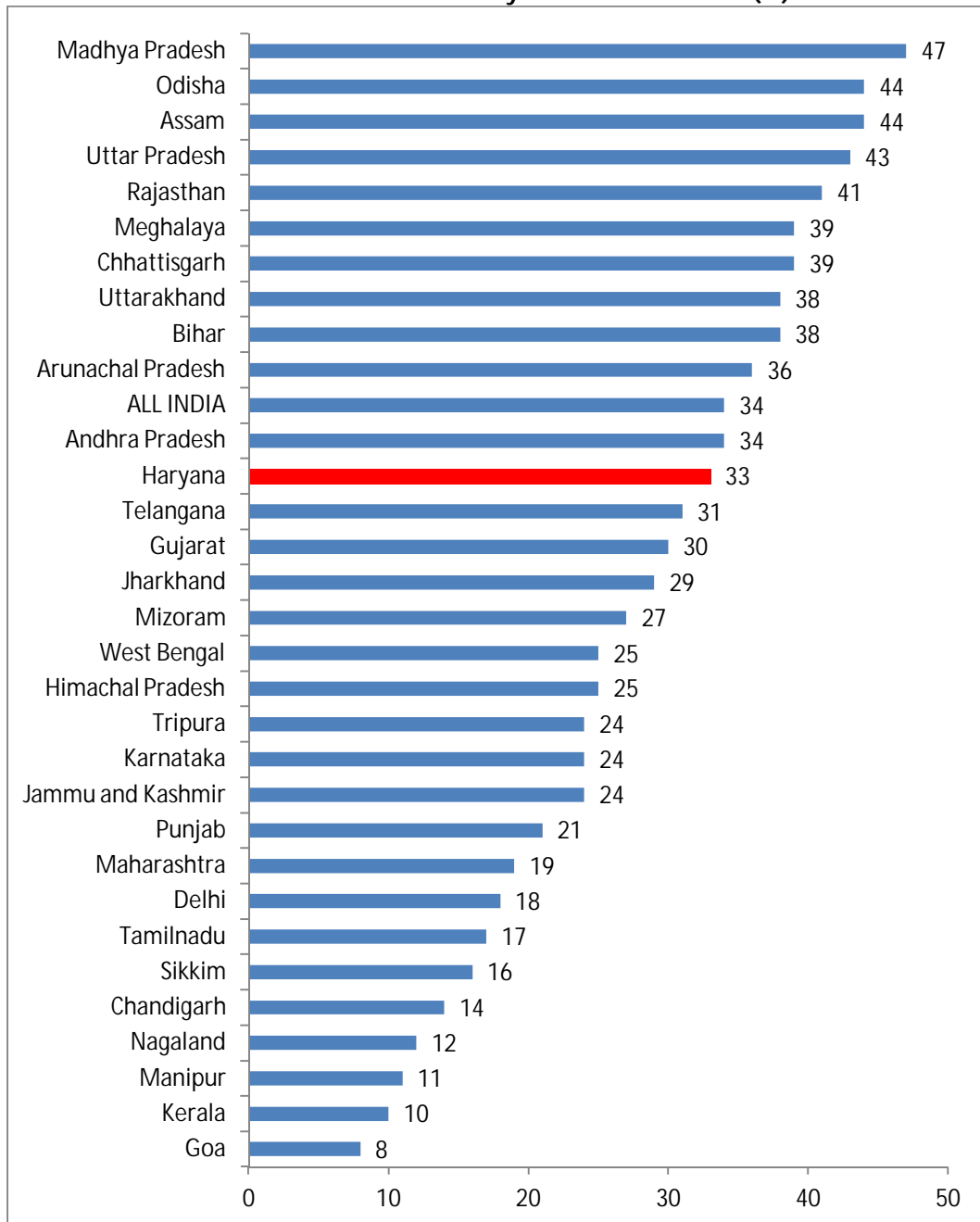


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Chart 17: Infant Mortality rate across States (%)



Source: PHD Research Bureau, compiled from RBI.





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Availability of safe drinking water and sanitation facilities

In Haryana, all the villages were provided with at least one safe source of drinking water by 31st March, 1992. Thereafter, the focus has been given to augment the drinking water supply infrastructure in the habitations. The status of drinking water in habitations is presently adjudged in terms of population coverage. During the current financial year, 74 identified habitations have been benefited.

During the year 2017-18, a sum of Rs.1483.18 crore has been provided under Capital Outlay of State/Central Plan for rural/ urban areas including Central Share of National Rural Drinking Water Programme, Desert Development Programme, NITI Aayog (Rs. 156.66 crore), as well as Central share / under National River Conservation Programme, (Rs. 25.50 crore).

At present, 14 schemes for augmentation of water supply, having a total investment of Rs. 1,158.45 crore, are in progress in 516 villages and 87 dhanies in 8 districts namely Mahendragarh, Rewari, Hisar, Sirsa, Bhiwani, Nuh (Mewat), Jind and Palwal, with financial assistance from NABARD.

State Government also launched "Swaran Jayanti Award for Sanitation Scheme" from July, 2016. The main objective of the scheme is to motivate and create a sense of competition among the Gram Panchayats to promote accelerated sanitation coverage and to eliminate the practice of open defecation in rural areas of the State.

Government of India released Rs 68.79 crore (USD10.67 million) to Haryana in 2016-17 under Swachh Bharat Mission (rural).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 and 50 municipal committees.

As of April, 2017, Swachh Bharat Mission (Urban) has been implemented in all 80 statutory towns and cities in Haryana. Around 24,986 individual household toilets out of the targeted 1,06,373 have been built, and around 1,679 public toilets have been constructed out of the target of 10,394. In Haryana, 10 towns - Panipat, Sirsa, Mandi, Dabwali, Thanesar, Pehowa, Ladwa, Shahbad, Kalanwali, Ellenabad and Rania - have been declared and certified as Open Defecation Free. Haryana has bagged the number-1 state award for its achievements in the field of sanitation and cleanliness under Swachh Survekshan Grameen-2018.





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6. Conclusions and Recommendations

Haryana is a state known for its rich cultural and heritage strengths. The state is acknowledged for its famous legends and vedic references. Haryana is a land locked state located in north India. The state shares its boundary with Uttar Pradesh in the east, Punjab in the west, Himachal Pradesh in the north and Rajasthan in the south. The state also surrounds national capital of Delhi from three sides.

The GSDP Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 3.5 lakh crore in FY2013 to about Rs. 6.1 lakh crore in FY2018. The size of economy of Haryana is expected to surpass more than Rs. 11.2 lakh crore by FY2023. Tertiary sector contributes a significant share of around 49.8% in the GSVA of the state followed by the secondary sector and primary sector at 30.7% and 19.5% respectively during FY2017. The NSDP (at current prices) of the Haryana has increased significantly from Rs 3.1 lakh crore in FY2013 to around Rs 4.9 lakh crore in FY2017.

Per capita income (Per capita NSDP at current prices) of Haryana stands at Rs. 1,80,174 (FY2017), which is significantly higher than all India per capita NNI (Net National Income at current prices) of Rs. 1,25,397⁶ (FY2019). Gross Fiscal deficit as a percentage of GSDP has remained below 3% for both the years FY2019 and FY2018.

Haryana is predominantly an agrarian state with nearly 80% of the state's total geographical area under cultivation. The state is the second largest food grains producer in the country. The state has favorable weather conditions for both Rabi and Kharif crops. It has achieved self-sustainability status in food production and milk products. Major crops grown in the state include rice, wheat, pulses, cotton, sugarcane, pearl millet and rapeseed and mustard. The main horticultural crops of the state having good potential are cauliflower, onion, potato, tomato, chillies, guava and kinnow.

The State has a huge potential for establishment of agro-based and food processing industry. Initiatives to increase investment in proper post-harvest handling facilities and inadequate infrastructure facilities along the supply chain would reduce the losses due to wastage of substantial quantity of farm produce especially perishable commodities. Moreover, the consolidation of food processing industry in Haryana, comprising a large scale international players and a multitude of small-scale players and cottage industries, would bring the benefits of economies of scale.

Further, priority to the natural resource management would accelerate and sustain agricultural growth in Haryana. Scientific land use through adoption of conservation agriculture practices in the state, could be promoted. Focus on easy availability of credit facilities to small and marginal farmers to invest in advanced farm techniques would also enhance agricultural growth in the state.

⁶According to the First Advance Estimates of National Income, 2018-19





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Haryana has emerged as one of the most industrialized States in the country. The State has taken many initiatives over the years to carve out a special place for itself in the fields of engineering, automobiles, textiles, leather, Information Technology, electronic hardware and hi-technology industries. The gross value added (at constant prices) from industry/secondary sector has increased at the rate of 6.5% over the years FY2013-FY2017.

The state has attracted Rs. 12493 crore as industrial investment proposals in last five years (2014-2018⁷). The average share of Haryana in country's industrial investment proposals stands at around 0.7% during 2014 to 2017. Strategies and action plans involving investment promotion initiatives would make Haryana an ideal investment destination. Further, the incentives to industries to set up establishments on other districts of the state apart from Faridabad, Gurugram and Manesar, would bolster industrialization across the state.

According to the Business Reform Action Plan (BRAP) rankings for 2017-18, Haryana ranked 3rd in terms of ease of doing business. Recently, on December 20th, 2018, the Department of Industrial Policy and Promotion (DIPP) announced results of the first ever States' Start-up Ranking 2018 in which Haryana emerged among the 'Aspiring Leaders'. Further work on 'access to information and transparency' aspect would improve the state's EODB rankings. Initiation of labor reforms would provide flexible and uniform labor laws to facilitate EODB and increase growth rate of the sector. Encouraging and incentivizing private sector would uplift the industrially backward regions of the state. Further, focus on use of environment friendly technologies would enable sustainable development of the state. Encouraging efficient use of waste land and water vis-à-vis promoting usage of alternate sources of energy would bring further efficiency in the industrial sector.

MSMEs sector of the state has potential to drive growth of manufacturing sector and boost employment in the state. There are 9.7 lakhs MSMEs in Haryana that constitute 1.53% of the MSMEs in all over India. The state has presence of many manufacturing clusters in the cities of Ambala, Panipat, Karnal, Kaithal, Yamunanagar, Sonapat, Rohtak among others which has boosted industries such as IT, textiles, food and handlooms. Assurance of easy loans for MSMEs at low interest, initiatives to encourage private participation, basic problems, such as R&D/Innovation, access to technology, marketing support, among others would provide boost MSMEs in the state.

Haryana has a large base of skilled labour, making it an ideal destination for knowledge based and manufacturing sectors. Given this, top priority to reforms in the manufacturing sector would facilitate its growth and generate significant employment opportunities in the state.

During the last decade, the services sector of the state has performed significantly and emerged to be as a major contributor to the economic growth of Haryana. Services sector of the state has marked an impressive growth of about 10.5% during FY2013-FY2017. Banks are a significant indicator of the industrial and social development of any economy. Over the years the total number

⁷2018 till November





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of Commercial Banks (CBs) and Regional Rural Banks (RRBs) working in Haryana has increased from about 4025 as on September 2014 to 4708 as on September 2017.

Designing and developing services led growth strategy focusing on health, education, IT, tourism, logistics, bulk courier services, knowledge based and non-polluting services, sports, among others would bolster the growth of service sector of the state. Further, encouraging new business ventures in the services sector by the state through easy availability of loans and simplification of regulatory process would bolster the growth of service sector of the state.

Exports play a vital role in the economic growth of Haryana as the state's performance on the export front has been excellent. The total exports from the state have increased from USD11.3 billion during FY2015 to USD13.3 billion during FY2018. The major export items from the state are software, handloom products, scientific instruments, garments, automobiles and automotive components, electrical appliances, rice, pickles, etc. The agro-based industry of Haryana still holds a strong potential for exports. Further, providing more facilities/incentives to the exporting units would increase exports from the state.

Going ahead, the state has immense potential to leverage its strengths in agriculture sector and develop the food processing sector. Food processing sector has an immense potential to contribute in the global food processing exports. Facilitating special incentives in the districts such as Ambala, Bhiwani, Charkhi, Dadri, Karnal, Kaithal, Kurukshetra, Mahendergarh, Panipat, Rohtak, Sonapat, Yamunanagar, among others that can be developed as food processing hubs, would lead to further growth of this sector. This would not only accelerate industrial and economic growth but would create more than 1 lakh jobs in the next five years. On the infrastructure front, the state has 2741 km of national highways, a 1,710.5 km long rail route (as of March 2016) and a total installed power generation capacity of 11,260 MW (as of January 2018).

In a nutshell, focus on improving quality of infrastructure, enhancing agriculture productivity, addressing inflexibilities in labour markets, reforming manufacturing sector to bolster industrialization, would enhance its growth trajectory. Further, improvement in the quality of education, attraction of investments in health sector and strengthening of rural development would prove to be very beneficial for the state's social-economic aspect.





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PHD Research Bureau

PHD Research Bureau; the research arm of the PHD Chamber of Commerce and Industry was constituted in 2010 with the objective to review the economic situation and policy developments at sub-national, national and international levels and comment on them in order to update the members from time to time, to present suitable memoranda to the government as and when required, to prepare State Profiles and to conduct thematic research studies on various socio-economic and business developments.

The Research Bureau has been instrumental in forecasting various lead economic indicators national and sub-national. Many of its research reports have been widely covered by media and leading newspapers. Recently, the Research Bureau has undertaken various policy projects of Government of India including Framework of University-Industry Linkages in Research assigned by DSIR, Ministry of Science & Technology, Study on SEZ for C&AG of India, Study on Impact of Project Imports under CTH 9801 for C&AG of India, among others.

Research Activities	Comments on Economic Developments	Newsletters	Consultancy
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<ul style="list-style-type: none"> • State Profiles 	<ul style="list-style-type: none"> • States Development 	<ul style="list-style-type: none"> • Forex and FEMA Newsletter 	
<ul style="list-style-type: none"> • Impact Assessments 	<ul style="list-style-type: none"> • Infrastructure 	<ul style="list-style-type: none"> • Global Economic Monitor (GEM) 	
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Studies Undertaken by PHD Research Bureau

A: Thematic research reports

1. Comparative study on power situation in Northern and Central states of India (September 2011)
2. Economic Analysis of State (October 2011)
3. Growth Prospects of the Indian Economy, Vision 2021 (December 2011)
4. Budget 2012-13: Move Towards Consolidation (March 2012)
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6. The Indian Direct Selling Industry Annual Survey 2010-11 (May 2012)
7. Global Economic Challenges: Implications for India (May 2012)
8. India Agronomics: An Agriculture Economy Update (August 2012)
9. Reforms to Push Growth on High Road (September 2012)
10. The Indian Direct Selling Industry Annual Survey 2011-12: Beating Slowdown (March 2013)
11. Budget 2013-14: Moving on reforms (March 2013)
12. India- Africa Promise Diverse Opportunities (November 2013)
13. India- Africa Promise Diverse Opportunities: Suggestions Report (November 2013)
14. Annual survey of Indian Direct Selling Industry-2012-13 (December 2013)
15. Imperatives for Double Digit Growth (December 2013)
16. Women Safety in Delhi: Issues and Challenges to Employment (March 2014)
17. Emerging Contours in the MSME sector of Uttarakhand (April 2014)
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19. Youth Economics (May 2014)
20. Economy on the Eve of Union Budget 2014-15 (July 2014)
21. Budget 2014-15: Promise of Progress (July 2014)
22. Agronomics 2014: Impact on economic growth and inflation (August 2014)
23. 100 Days of new Government (September 2014)
24. Make in India: Bolstering Manufacturing Sector (October 2014)
25. The Indian Direct Selling Industry Annual Survey 2013-14 (November 2014)
26. Participated in a survey to audit SEZs in India with CAG Office of India (November 2014)
27. Role of MSMEs in Make in India with reference to Ease of Doing Business in Ghaziabad (Nov 2014)
28. Exploring Prospects for Make in India and Made in India: A Study (January 2015)
29. SEZs in India: Criss-Cross Concerns (February 2015)
30. Socio-Economic Impact of Check Dams in Sikar District of Rajasthan (February 2015)
31. India - USA Economic Relations (February 2015)
32. Economy on the Eve of Union Budget 2015-16 (February 2015)
33. Budget Analysis (2015-16)
34. Druzhba-Dosti: India's Trade Opportunities with Russia (April 2015)
35. Impact of Labour Reforms on Industry in Rajasthan: A survey study (July 2015)
36. Progress of Make in India (September 2015)
37. Grown Diamonds, A Sunrise Industry in India: Prospects for Economic Growth (November 2015)
38. Annual survey of Indian Direct Selling Industry 2014-15 (December 2015)
39. India's Foreign Trade Policy Environment Past, Present and Future (December 2015)
40. Revisiting the emerging economic powers as drivers in promoting global economic growth (February 2016)
41. Bolstering MSMEs for Make in India with special focus on CSR (March 2016)
42. BREXIT impact on Indian Economy (July 2016)
43. India's Exports Outlook (August 2016)





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44. Ease of Doing Business : Suggestive Measures for States (October 2016)
45. Transforming India through Make in India, Skill India and Digital India (November 2016)
46. Impact of Demonetization on Economy, Businesses and People (January 2017)
47. Economy on the eve of Budget 2017-18 (January 2017)
48. Union Budget 2017-18: A budget for all-inclusive development (January 2017)
49. Annual Survey of Indian Direct Selling Industry 2015-16 (February 2017)
50. Worklife Balance and Health Concerns of Women: A Survey (March 2017)
51. Special Economic Zones: Performance, Problems and Opportunities (April 2017)
52. Feasibility Study (socio-Economic Survey) of Ambala and Rohtak Districts in Haryana (March 2017)
53. Goods and Services (GST): So far (July 2017)
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56. Senior Housing: A sunrise sector in India (August 2017)
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60. India-Israel Relations: Building Bridges of Dynamic Trade(October 2017)
61. Role of Trade Infrastructure for Export Scheme (TIES) in Improving Export Competitiveness (November 2017)
62. India - China Trade Relationship: The Trade Giants of Past, Present and Future (January 2018)
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