

INVEST INDIA

India's National Investment
Promotion & Facilitation Agency
BELGIUM - OCTOBER 2017



**INVEST
INDIA**

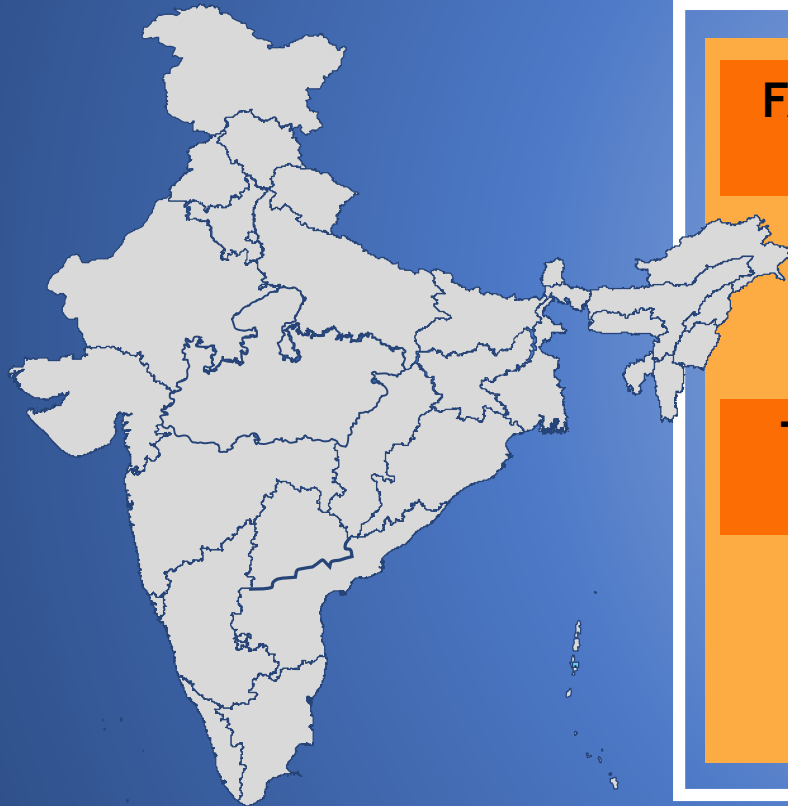
NATIONAL INVESTMENT
PROMOTION AND
FACILITATION AGENCY

TRANSFORMING INDIA



**INVEST
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**FASTEST GROWING
ECONOMY**

**7.1%
\$2.3T**

**TOP INVESTMENT
DESTINATION**

\$175B
April 2014-June 2017

POPULATION

1.5B
2030

AVERAGE AGE

29
2025

CONSUMER MARKET

4T
2025

MIDDLE CLASS

600M
300M in 2004

MISSION INDIA- INCLUSIVE GROWTH

DIGITAL INDIA



1.2 billion
Broadband Users
(462 million)

STARTUP INDIA



**Fastest growing
ecosystem**

SKILL INDIA



19 million
skilled workers

JAN DHAN YOJANA



300 million
bank accounts

AADHAR



1.17 billion
enrolments

MAKE IN INDIA



**Sectors, Processes,
Infrastructure &
Mind-set**

'MAKE IN INDIA'

Launched: September 2014

Vision: Manufacturing share of GDP to 25%

Objective: Make India the most preferred global manufacturing & design destination

25 focus sectors

> 7000 procedures / policy revisions



MAKE IN INDIA

'MAKE IN INDIA' FOCUS SECTORS



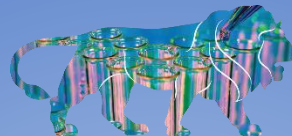
Auto
\$300 billion



Auto Comp
\$115 billion



Aviation
\$82 billion



Biotech
\$100 billion



Mining
\$80 billion



Oil & Gas
\$110 billion



Pharma
\$55 billion



Chemicals
\$430 billion



Construction
\$640 billion



Defence
\$130 billion



Capital Goods
\$112 billion



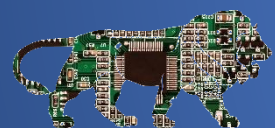
Railways
\$142 billion



Renewables
\$260 billion



Roads
\$150 billion



Electronics
\$400 billion



Food Processing
\$320 billion



IT / BPM
\$350 billion



Leather
\$30 billion



Textiles
\$223 billion



Thermal Power
\$125 billion



Tourism & Hospitality
\$419 billion



Media & Entertainment
\$30 billion



Wellness
\$7 billion



Ports
\$150 billion



Space
\$40 billion

MAKE IN INDIA: EASE OF DOING BUSINESS



FDI POLICY 2016

Open Economy

GOODS & SERVICES TAX

Single Tax System (July 2017)

IPR POLICY 2016

Promote innovation, strict enforcement & expedited process

COMPANIES ACT 2015

Simplified Compliance

PERMANENT RESIDENCY

PRS for investors for 10 years

eBIZ PORTAL

Single portal for company licensing & registration

E-VISA

E-Visa for 162 countries
(Including Belgium)

BANKRUPTCY CODE

Time-bound Insolvency
Process

MAKE IN INDIA: INFRASTRUCTURE

\$ 1 trillion investments

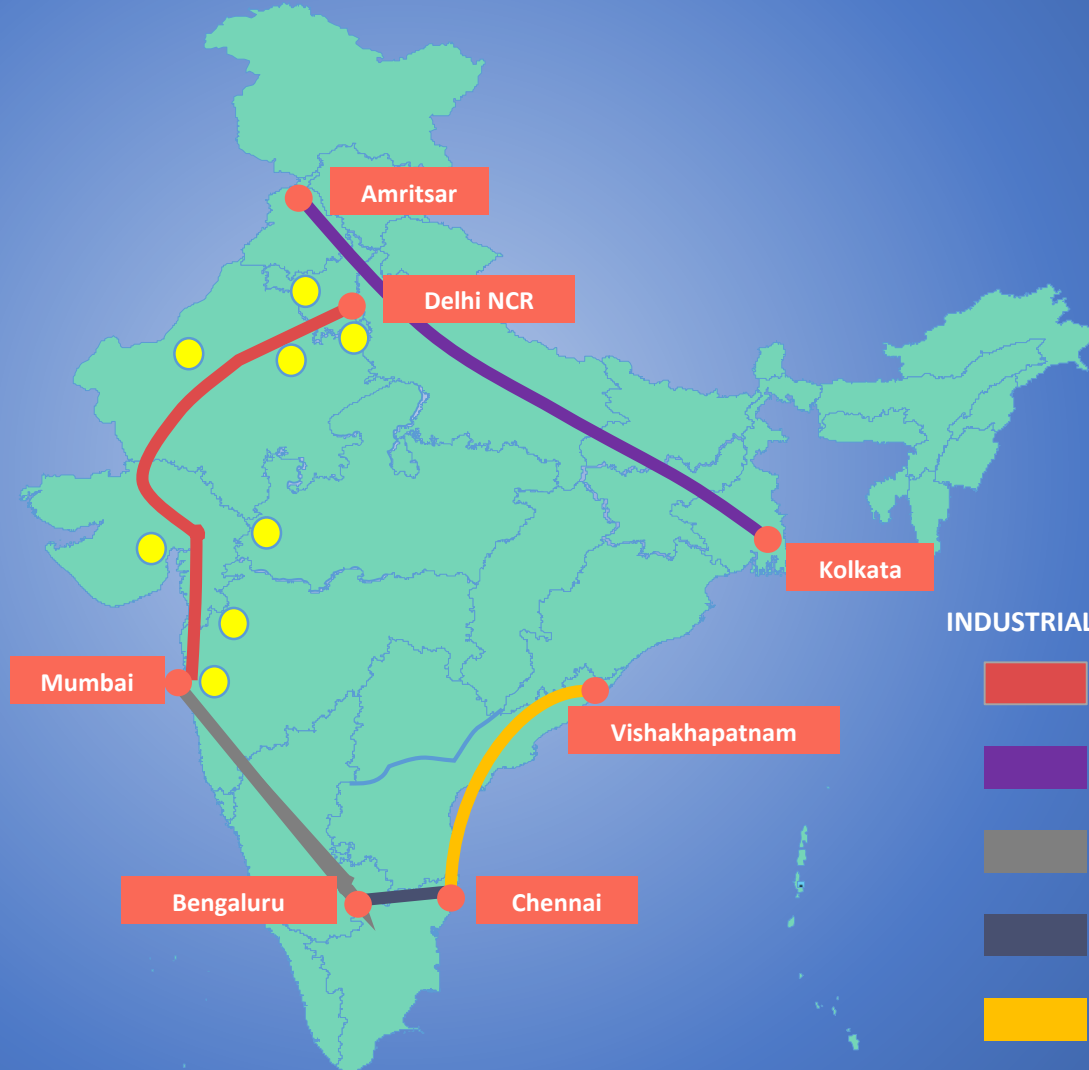
Roads	40 km / day (2017)	Aviation	250 airports
Railways	\$ 142 billion (400 stations, 6 DFCs)	Ports	\$ 57 billion Sagarmala Project
Inland Waterways	111 (To be developed)	Logistics	35+ Logistics Parks
Housing for All	110 million houses (20 million)	Smart Cities	100+ smart cities
Renewable Energy	175GW (Current: 58 GW)	Industrial Corridors	5 Industrial Corridors

INDUSTRIAL CORRIDORS

100% FDI

\$100 billion (DMIC)

8 Greenfield Cities
24 Investment Regions



INDUSTRIAL CORRIDORS AND INFLUENCE ZONE

- Delhi Mumbai Industrial Corridor
- Amritsar Kolkata Industrial Corridor
- Bengaluru Mumbai Economic Corridor
- Chennai Bengaluru Industrial Corridor
- Chennai Vizag Industrial Corridor

ROADS AND HIGHWAYS






100% FDI

\$150 billion

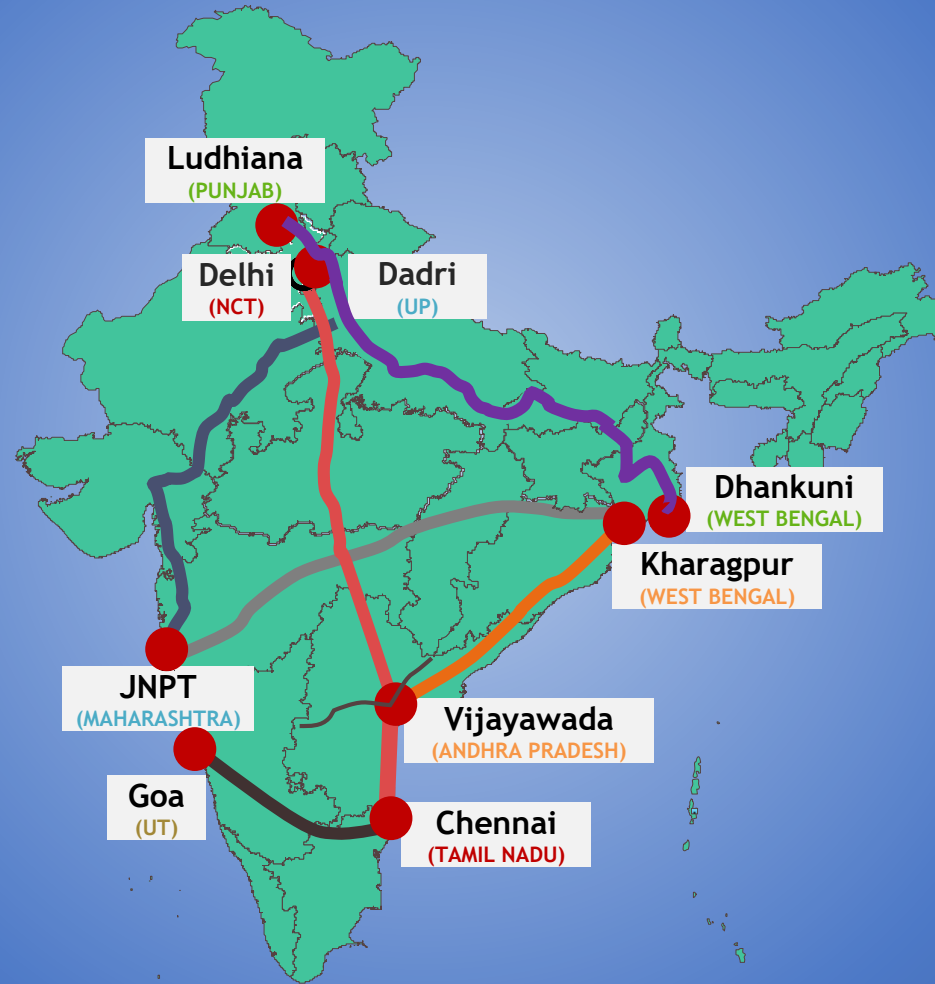
40 km / day

*NH: 100,087 km
SH: 2,731,918 km (including districts)



-  The Golden Quadrilateral
-  North-South Corridor
-  East-West Corridor

RAILWAYS: DEDICATED FREIGHT CORRIDORS



Under Implementation

 Eastern DFC 1,840 km

 Western DFC 1,504 km

Planning Stage

 North-South DFC 2,343 km

 East-West DFC 2,330 km

 East Coast DFC 1,100 km

Approved

 Southern DFC 899 km

Total Length: 108,706 km

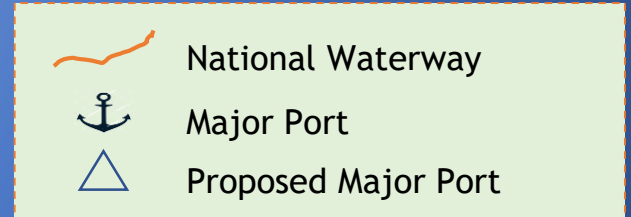
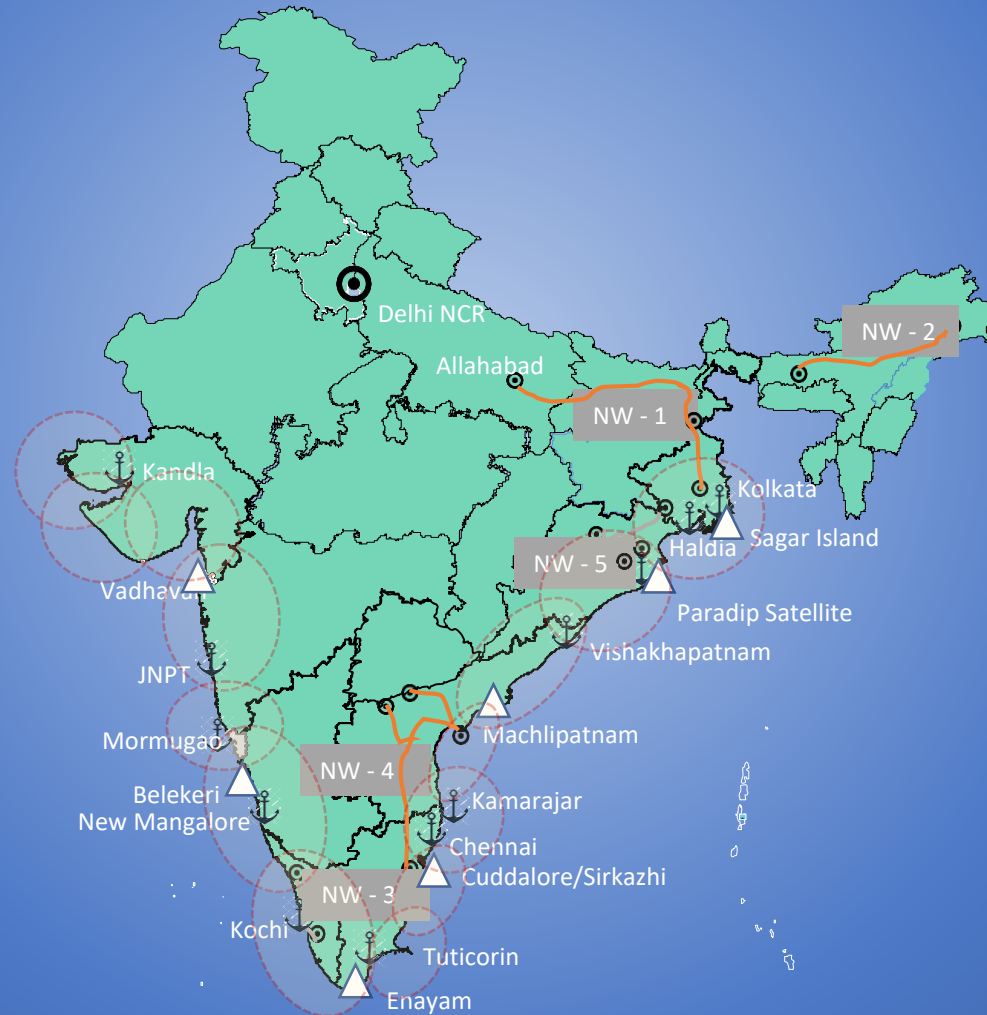
100% FDI

\$142 billion

- 2019 - Target for Commissioning Eastern & Western DFC
- 400 stations to be modernized
- High Speed Railway Diamond Quadrilateral

PORTS & INLAND WATERWAYS

- 7 Greenfield major ports,
- 44 capacity enhancement projects
- 12 Major Ports, 200 Non-Major Ports, and 5 waterways
- Key private sectors ports are Mundra, Pipavav, Krishnapatnam



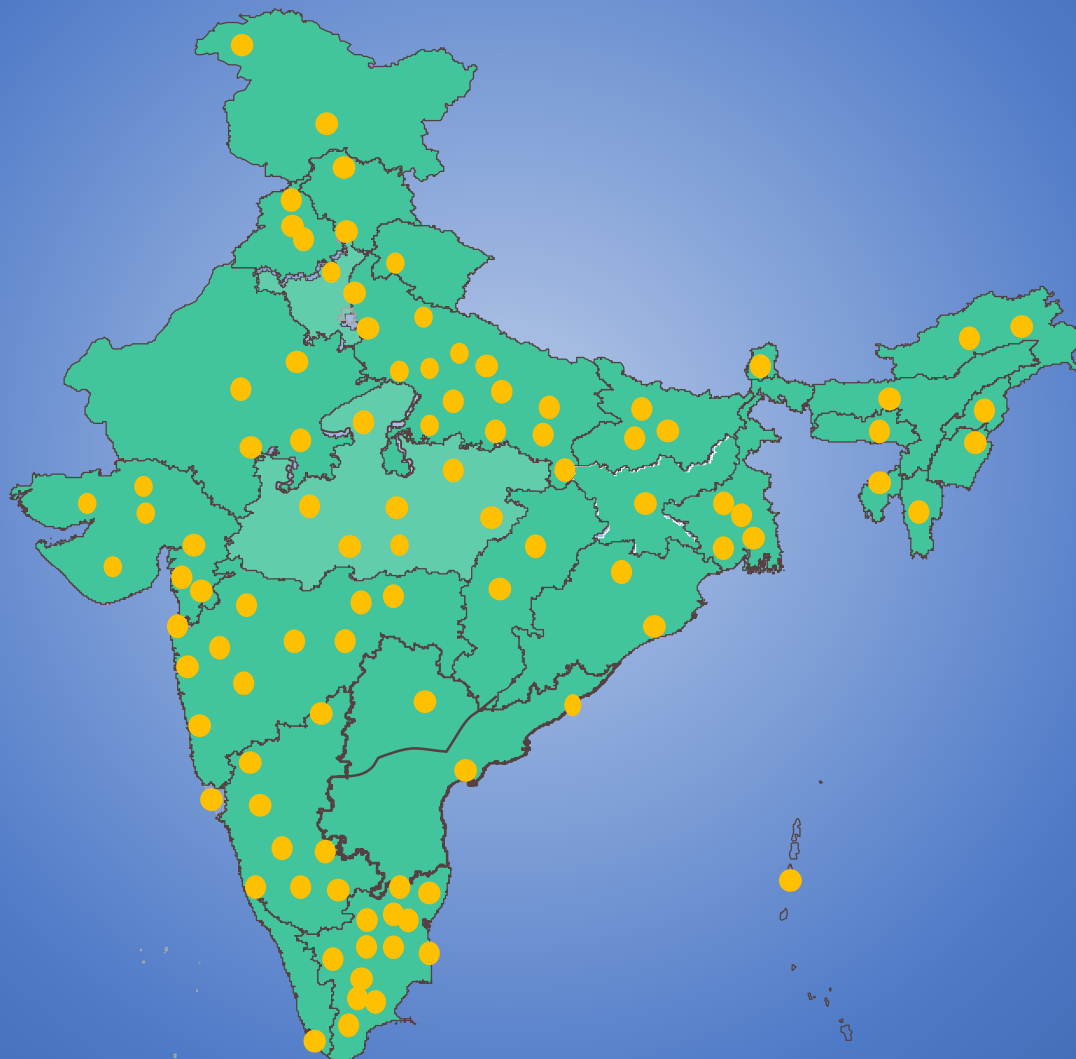
100% FDI

\$150 billion

SMART CITIES

100% FDI

\$150 billion



Shortlisted Cities

107
Smart
Cities
by 2022

90
Cities already
shortlisted

\$15 bn
Budgetary
support over
next four
years

MAKE IN INDIA: INFRASTRUCTURE

\$ 1 trillion investments

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MAKE IN INDIA: INVEST INDIA - ONE STOP SHOP

GOVERNMENT

Centre / States

Foreign Missions / Agencies



INDUSTRY

Associations / Corporates

Professional Advisors /
Academia

Awareness &
Engagement

Business Advisory

Strategy &
Implementation

Investor Aftercare

Long term
partnership

Opportunity
Assessment

Partner / Location
Search
Market Strategy

Regulatory Clearances
Policy Guidance

Issue Redressal

Continuous
Engagements



UNCTAD Award for World's
Best Practice IPA
2016



IPA in South Asia,
East Asia, Oceania
2016



Best Investment
Deal for IUIH
2016

INVEST INDIA CASE STUDY : Smart phone manufacturing in India



Situation

Company: JV between a Chinese manufacturer and leading Indian brand with >85K retail counters

Investment Plans

- Manufacture 30M+ smartphones annually (Phase 1)
 - 10 acres land needed
 - 44 production & 24 packaging lines
- Employment: 3,200

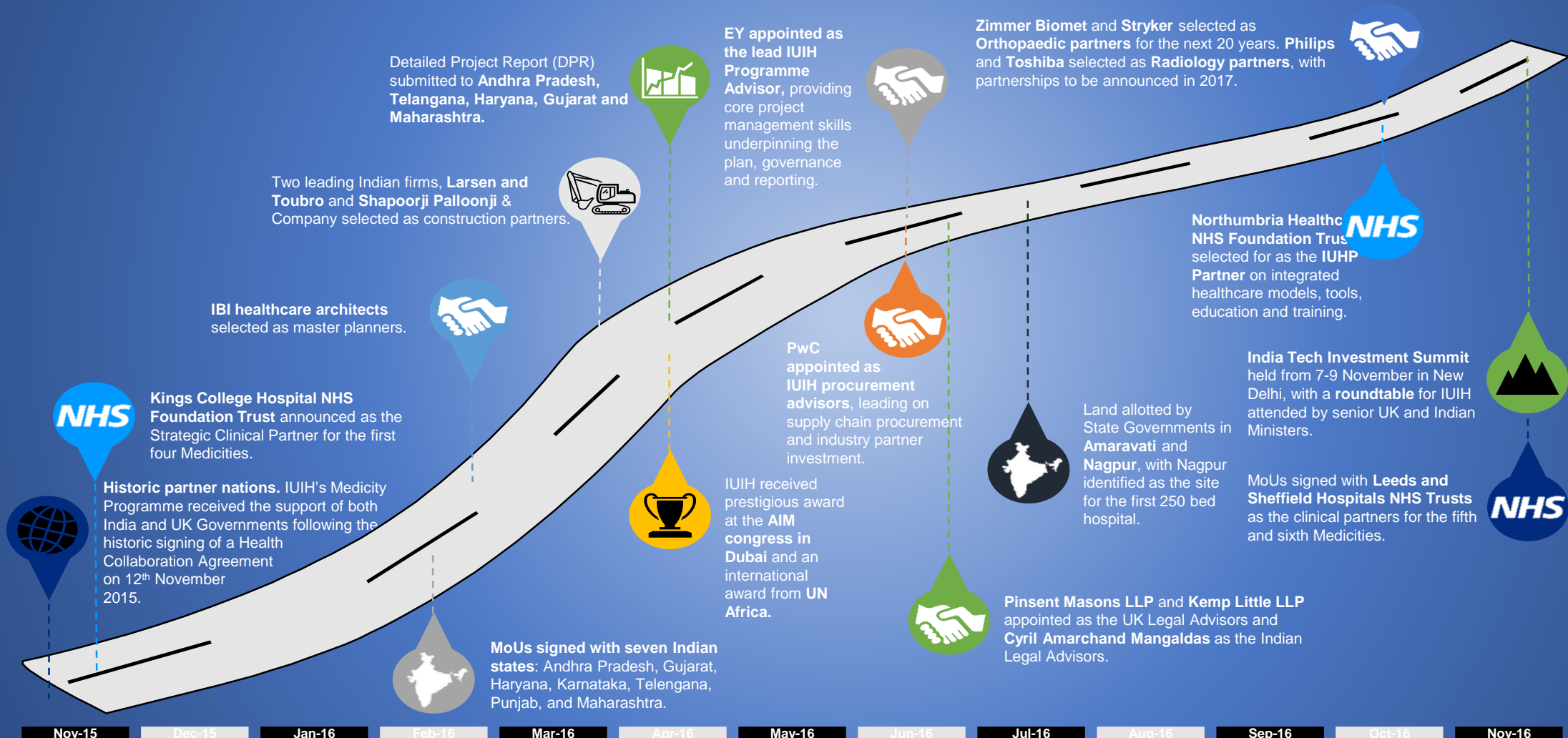
Invest India support

- **Pre-Investment Stage:** Clarify FEMA rules, Assist with Company incorporation, Help apply for Sector benefits and registrations
- **Investment Execution:** Assist to select site, help apply for incentives, coordinate among various Central and State departments
- **Aftercare Services:** Advisory for expansion, help set-up cluster for ESDM units (Phase II), Inputs to state government on electronics policy

Results

- The factory has started production, now 1,800 employees
- Application for MSIPS was made and approval received
- Special incentive package from the state

INVEST INDIA CASE STUDY : HOSPITAL CHAIN



INVEST INDIA CASE STUDY : Automobile manufacturer



Company Background & Requirements

- French multinational automobile manufacturer
- establishing **greenfield and brownfield facility for passenger cars** across various countries

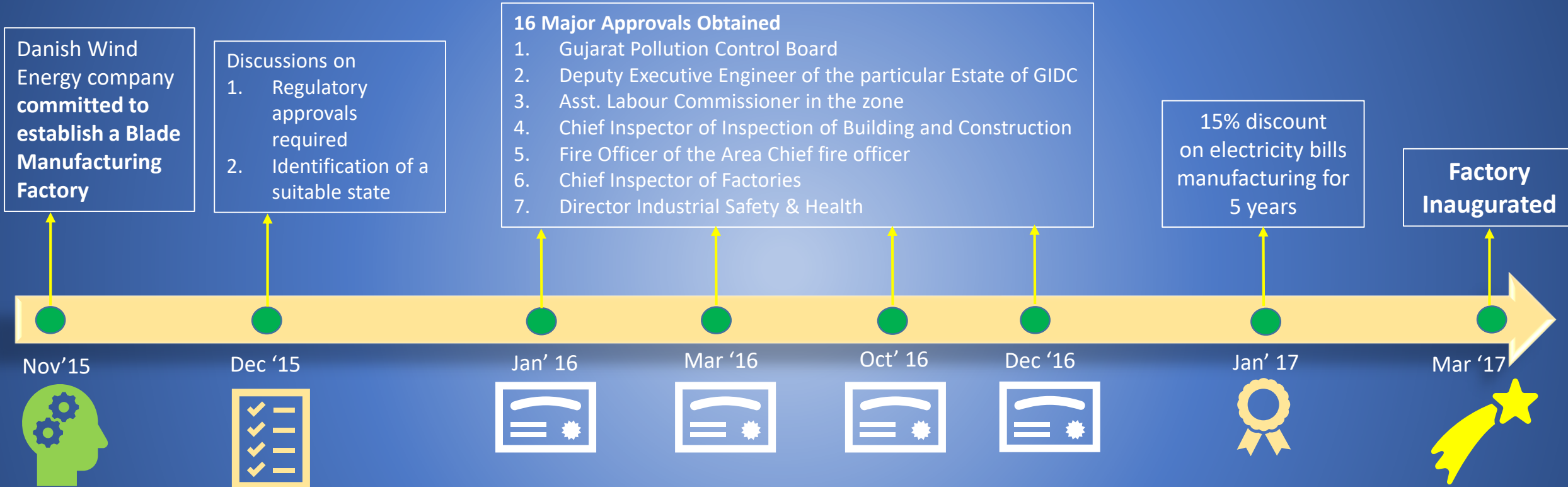
Business Advisory & Facilitation

- Facilitated communication between Federal Government and Company Board
- Held **several rounds of discussions with the senior management of the company** to understand their requirements and business plan to pitch India vis-à-vis other competing countries
- Advised on **suitable company structure and India market entry strategy**
- Identified and shortlisted potential states & locations within
- Initiated discussions and negotiations between States and senior management of company
- Advised on **procedures, applicable policies, incentives and regulations**

Key Outcomes

- **Commitment of an investment of USD 1 billion in Phase 1**
- Ongoing negotiations of MoU between State Government and Company
- Official press announcement made to **formalize a partnership deal by 2018 and launch their products by end-2021**
- Invest India is in active discussions with the company to open unit for powertrain, gearboxes, assembly of cars and R&D centre

INVEST INDIA CASE STUDY: WIND ENERGY COMPANY



A factory set up in only 14 months 's, shortest timeline for the Danish Wind Energy company in the world

WABCO: INDIA JOURNEY

Advantage India

80%

Market Share in Braking Systems for Commercial Vehicles

1/3rd

of Global Workforce in India (4,434)

5

Manufacturing Sites - *Ambattur, Jamshedpur, Mahindra World City, Pant Nagar, Lucknow*

\$320mn

Annual Revenue (FY16-17)

R&D Hub

1/3rd

Groups engineers
in India

85%

Chennai engineers involved in
Global Development

2

Development Centres

50%

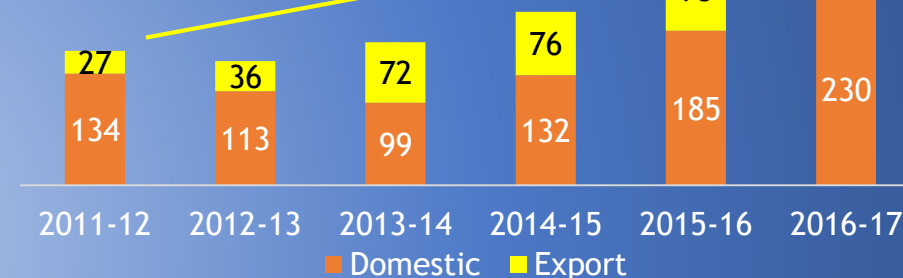
Ambattur engineers involved in
Global Development

Indian engineers built an assembly line in India at 1/2 the cost as in China

INDIA AS AN EXPORT HUB

Sales (in \$MM)

Export CAGR: 27%

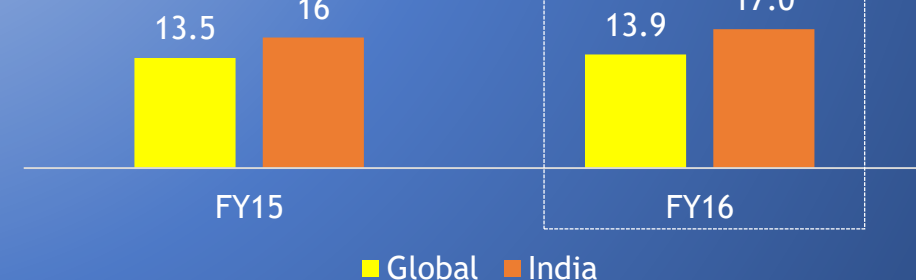


~30% of local production is exported to Japan, Europe, US and South American markets

HIGHER PROFITABILITY IN INDIA

Operating Margin (%)

FY17



INDIA: LEADING DESTINATION FOR FDI

1ST WORLD'S
FASTEST
GROWING
LARGE
ECONOMY IN
2016 & 2017
Source: IMF & UN

1ST WORLD'S
MOST
ATTRACTIVE
INVESTMENT
DESTINATION
*Source: Ernst &
Young*

1ST WORLD'S
GREENFIELD
FDI
DESTINATIONS
*Source: Financial
Times, 2015*

1ST ON THE
GROWTH,
INNOVATION AND
LEADERSHIP
INDEX
*Source: Frost &
Sullivan*

7TH
MOST VALUED
NATION BRAND
IN THE WORLD
*Source: Brand
Finance*



6TH
LARGEST
MANUFACTURING
NATION IN THE
WORLD
Source: UNIDO

1ST CHOICE FOR
TECH MNC'S
TO SET UP
R&D CENTRES
OUTSIDE
THEIR HOME
COUNTRIES
Source: Zinnov

**UP
32** PLACES
ON THE GLOBAL
COMPETITIVENESS INDEX
Source: World Bank 2014-16

73%
TRUST IN GOVERNMENT
Source: OECD

94%
INDIAN BUSINESSES ARE
CONFIDENT OF INDIA'S
ECONOMIC GROWTH
Source: Grant Thornton

THANK YOU
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