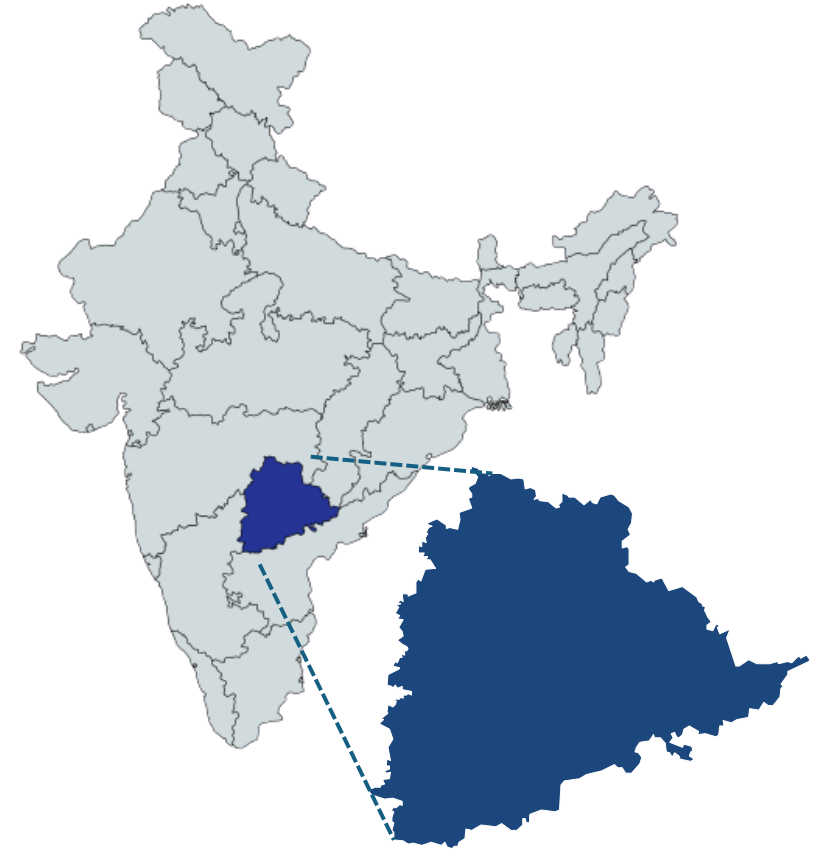




Telangana: The Top Destination for Investors in India



- ✓ Evolution of IT & Industries in Telangana
- ✓ Why Telangana?
- ✓ Planning for 2050: 3 Zones
- ✓ Focus Sectors
- ✓ Flagship projects/initiatives





Evolution of IT & Industries in Telangana



Evolution of IT & Industries in Telangana (1/1)



Since the 1990s, Hyderabad/Telangana, which was then a part of Andhra Pradesh, was strategically developed by all governments in power



**STP in 1991 and
HITEC City in 1998**



**Genome Valley
(commissioned in 1999)**



**Aerospace & Precision Engineering
SEZ, Adibatla (approved in 2008)**

1990s &
2000s

2014 -
2023

2023 &
Beyond

Evolution of IT & Industries in Telangana (2/2)



The growth story, particularly in the IT and Pharma sectors, continued after Telangana formation in 2014. The following factors contributed to this as a whole:



Infrastructure

Outer Ring Road, Metro, and other projects gave a massive boost to the growth of IT



Ease of Doing Business

Ranked top 3 consistently in EODB rankings in the country



Innovation

Presence of highly reputed educational institutes and an active focus on building innovation ecosystem



Policy Reforms

Sectoral policies
Reforms to be further fueled under the current leadership

The **most valued global tech companies and banks** have some of their **biggest offices in Hyderabad** and continue to expand in the city



1990s &
2000s

2014 -
2023

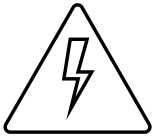
2023 &
Beyond

Evolution of IT & Industries in Telangana (3/3)



Several initiatives have been planned to make Telangana a leading global destination for investors.

Telangana Clean & Green Energy Policy 2025



- To ensure Telangana's energy security with reliable, affordable power, self-sufficient utilities, and sustainable growth. Promote renewables, energy storage, green hydrogen, manufacturing, investments, and job creation.

Skilling & Workers' Welfare



- Young India Skills University established in PPP mode in Hyderabad for industry-aligned skilling programmes across sectors
- Special focus on neglected areas like support for workers housing, upskilling, digital employment exchange etc.
- Comprehensive legislation on Gig Workers

Export Enhancement Policy



- Aim to make Telangana an export powerhouse
- Increase exports from the current value of US\$ 11.4 billion to US\$ 65 billion by 2030 **(6x increase over next 6 years)**

MSME Policy



- Dedicated policy to support MSMEs with improved technology, ability to recruit skilled manpower, financing, market access, and prevention of industrial sickness

1990s &
2000s

2014 -
2023

2023 &
Beyond



Why Telangana?





1. TG-iPASS

Single-window clearance system which gives approvals based on self-certification in less than 15 days.

2. Progressive Policies

New Industrial policy and Sectoral policies on EV, Life Sciences, AVGC, Semiconductors etc. to be launched soon.

3. Meet or Beat Incentives

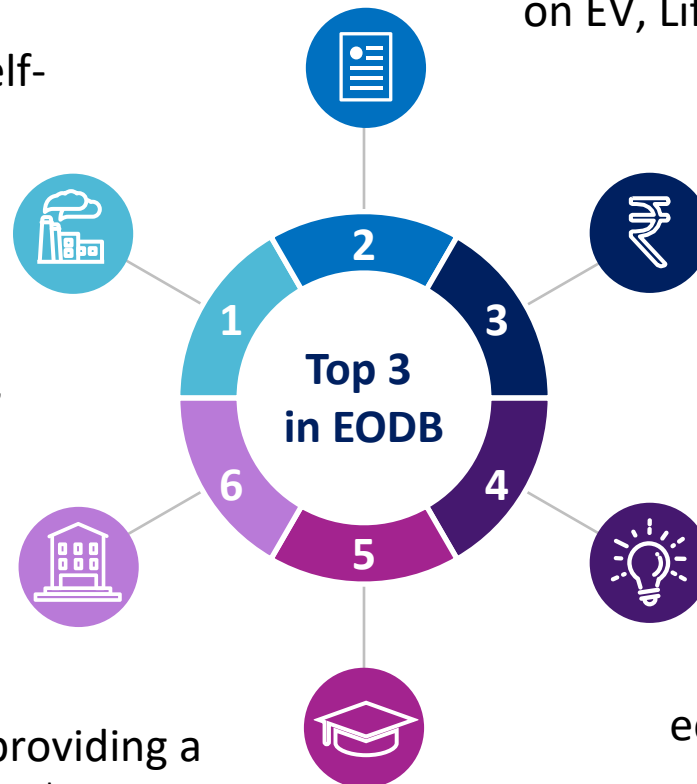
Competitive incentives in comparison to other states are given to Mega Projects*

4. Innovation Ecosystem

Ranked 2nd in Innovation in India because of a vibrant innovation ecosystem with world-class facilities like T-Hub and T-Works

5. Talent Pool

Home to top universities in India providing a skilled workforce. The state ranks 3rd in India in net positive talent balance.



6. Advantage Hyderabad

Hyderabad provides world class amenities, low cost of living, great infrastructure and travel connectivity to residents

* Mega Projects are projects with investment over USD 25M or which provide employment for minimum of 1000 personnel

Telangana | Best in Class Infrastructure



KEY INFRASTRUCTURE INITIATIVES

Road Infra

24,245 km road incl. 2,690 km of National Highways & 3,152 km of State Highways

Outer Ring Road

158 km long ORR around Hyderabad connecting major industrial areas with airport and residential areas

Regional Ring Road

340 km long 4-laned access controlled RRR being planned connecting major suburbs



CONNECTING HYD TO THE WORLD | Enabling Global Trade



Non-stop and one-stop flights to the **20+ International & 60+ Domestic destinations**

RGIA Expansion

Airport's capacity expanded to up to **40 million passengers per annum**

Expansion of Hyd. Metro

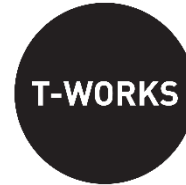
Third operational network in India, with further expansion & connectivity to airport soon

Telangana | Integrated Innovation and R&D Ecosystem



T-Hub

World's largest incubator ecosystem; actively working with 2000+ national and international startups raising funding of \$1.94 Bn



T-Works

India's largest prototyping Centre with a vision to create and celebrate a culture of experimentation and innovation



WE Hub:

Exclusive startup ecosystem for women entrepreneurs, already incubated 5,967 startups



RICH
Research and Innovation
Circle of Hyderabad

Research & Innovation Circle of Hyd.

links research institutions, academia and industry along with VCs, angel investors and incubator, and actively facilitates process of taking their research to market



TELANGANA STATE
INNOVATION CELL

Telangana State Innovation Cell

An initiative by State Government for aspiring innovators, start-ups, and changemakers



EMERGING TECHNOLOGIES
ITE&C DEPARTMENT

Emerging Technologies Wing

is created to develop ecosystem required for industry and govt. depts to leverage emerging tech, in 8 key areas such as Blockchain, AI, IoT, Cloud, 3D Printing, VR/AR, Robotics and Big Data

Telangana | Powerhouse of Talent



SKILLS AND EDUCATION REPORT - SCIENCE AND TECH.



176,531

Students in UG, PG and Diploma Programs



34,510

Teaching and Training Faculty in Science & Tech.



297

Acclaimed Institutions for Science & Technology



Young India Skills University (YISU)

to bridge the gap between industry needs and academic offerings through real world demand-oriented curriculum

Telangana Academy for Skill and Knowledge

enhances skilling synergy among institutions of Government, Industry & Academia.



UNIVERSITIES AND RESEARCH INSTITUTES



Hyderabad | The Safest and Most Livable City in India



27,000+
Schools



900+
Hospitals



5,000+
Diagnostic
Centers

COST OF LIVING INDEX : 21.4
(Compared to New York at 100)

SAFEST CITY
Safety and security
for women



CITY TRAFFIC
Hyderabad is rated one of
the best cities in India in
terms of city traffic
management.



**AFFORDABLE RESIDENTIAL
MARKET**
– JLL's Home Purchase
Affordability Index (HPAI)



CULTURE & HERITAGE
Remarkable cultural diversity
known for its rich cuisine,
historical monuments, dance and
art forms



SPORTS & LEISURE
Presence of 10+ golf courses
and 12 world-class stadiums



Hyderabad ranked most dynamic city in India

– JLL City Moment report

'Most Livable City' in India for the 6th consecutive year

– Mercer's Quality of Living Index



Planning for 2050



Planning for 2050: 3 Proposed Zones for Decentralized Development



3-Ring Structure

CURE *(Urban)*

- Area inside the Outer Ring Road (ORR)
- Already has high development in IT, GCCs and multiple other sectors
- Core Economic Growth Engine to become one of the top 5 Global Cities by 2050

PURE *(Semi-Urban)*

- Area between ORR and proposed Regional Ring Road (RRR)
- Will focus on Manufacturing Clusters, City-centric Agri and value-add zones
- Net Zero City, Sports Hub, AI City, Pharma Villages etc. are being planned here

RARE *(Rural)*

- Area beyond RRR to the state boundaries
- Industrialization and Development in this zone not given importance earlier
- IT hubs being planned in Tier 2/Tier 3 towns
- Developmental initiatives, Citizen Welfare & Productivity schemes will be focused here.



Focus Sectors



Focus Area 1: IT/ITES and GCCs



Hyderabad is the **fastest growing destination in India for IT/ITeS** investments with highest **Y-o-Y growth in IT Exports**

Telangana boasted an **IT Exports figure of over \$32 Billion** recently and is **home to about 1 million tech employees**

Telangana hosts the **biggest offices outside the HQ for the biggest tech firms and banks** in the world

Focus on Emerging Technologies and AI



- Aim to make Telangana the AI Hub of the Country
- **Global AI Summit conducted** with a goal to make “**Make AI Work For All**”
- **AI City planned to foster world class AI ecosystem**

Home to R&D and Design Centers



Presence of major players in IT and ITeS



- Largest campus outside of HQ in Seattle
- More than 35,000 employees working on technology and operations

- Microsoft has its largest campus outside its headquarters in Redmond, US
- Home to 9000 employees involved in R&D, customer support service , data centers

- Biggest technology development center outside the US
- More than 35k employees work in various verticals including google Maps, google ads

- Built its largest tech development center outside of US, with a focus on development of maps for Apple products

Global Capability Centers – Tapping New Opportunities



Hyderabad is one of the **top destinations in India for GCCs**

Home to **over 200 GCCs** with a **total workforce of over 200,000** active employees in the sector

GCCs in diverse sectors including **BFSI, Retail, Software, Automobile, Food & Beverages, and Lifesciences**

Advantage Hyderabad



Declared the '**Most Livable City**' in India for 6 years as per Mercer's Quality of Living Index



Ranked as **world's Most Dynamic City** as per JLL City Momentum Index 2020

Home to GCCs by

Goldman Sachs

intel



Bristol Myers Squibb

amazon



Presence of major players with GCCs in Telangana



First GCC outside of the US with 2500+ employees



Largest campus outside of the US with 4000+ engineers



Biggest technology hub outside its headquarters with 3000 employees.



Hyderabad technology center is one of the pillars of innovation for ZF group with 3500+ R&D engineers.

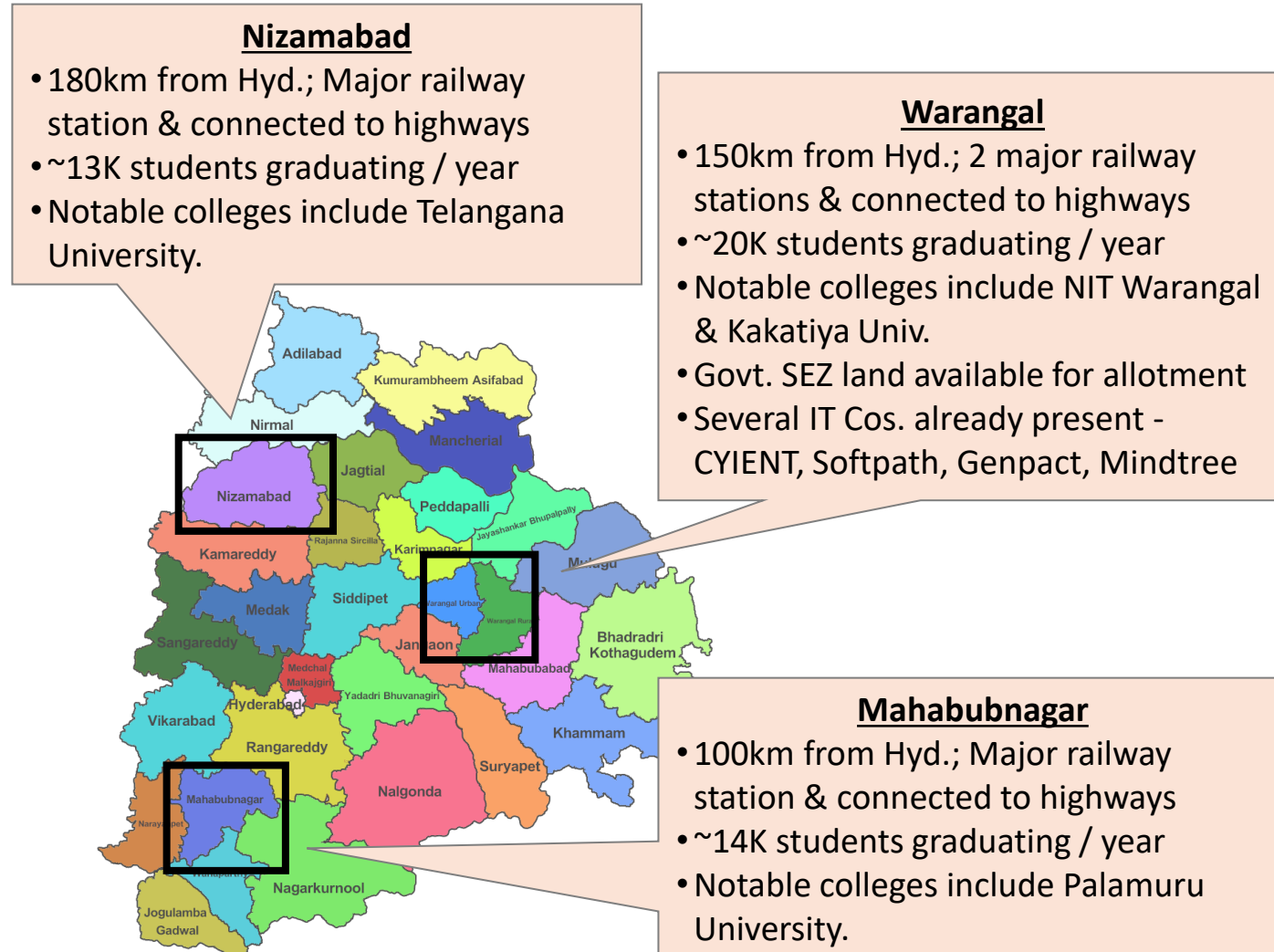


Largest campus outside of the US with 2500+ employees

Dispersal of IT Sector and GCCs



- The IT industry & GCCs are **currently concentrated in Hyderabad.**
- Different **Tier 2 cities** in the state have been identified, with **quality infrastructure, good connectivity and state-of-the-art colleges** producing good talent.
- The current government aims to **plug loopholes** in the previous approach and **expand the IT sector across the state**



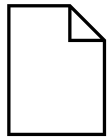
Tentative Cities for focused dispersal of IT Sector and GCCs



Focus Area 2: Data Centers - Powering the Digital Future

Hyderabad Leads India in Data Center Growth, Offering Advanced Tier-IV Infrastructure and Unparalleled Network Connectivity for Mission-Critical Operations.

Highlights of Data Centers Ecosystem in Telangana



1st state in India with an active Data Center Policy since 2016

Increased Hyperscale Investment precommitments due to AI led demand

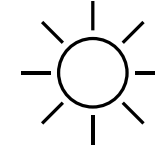


BFSI and TMT segments account for 51% and 31% share of the local enterprise users

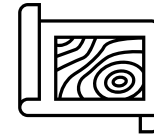
Telangana Advantages



Strategic Location



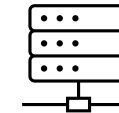
Stable weather with low humidity



Seismic Stability



High-Capacity Substations



Robust IT infra & Skilled Manpower



Cost Efficiency

Presence of major Data Centers & Expansion





Focus Area 3: Life Sciences and Pharmaceuticals

Hyderabad is considered the **Life Sciences Capital of Asia**


- **1800+** Life Sciences Companies
- **\$80 Bn** Ecosystem Value
- **250+** USFDA approved sites (Only region in the World)

Best-in-class industry infrastructure:


- 1.Genome Valley:** India’s first & largest life sciences hub with 200+ companies
- 2.Medical Devices Park:** India’s largest med-tech park with 60+ companies

Highlights of Life Sciences Sector in Telangana

 1/3rd of Global Vaccine Production

 40% of National Pharma Production

 20+ Life Sciences and Medtech Incubators

 40+ National Research/ Academic Institutions

Major Events & Facilities

- BioAsia** – Annual Lifesciences Event
- Biopharma Hub** – Scale-up Mfg. Facility
- Flow Chemistry Hub** – Advanced Mfg. Process
- World Economic Forum’s C4IR** Telangana Centre
- Antimicrobial Resistance CoE**

Presence of major players across Life Sciences value chain

In the last 2 years, 3 of the top 10 global pharma companies announced establishment of innovation centers in Hyderabad. Now, Hyderabad has 5 of the top 10 companies having direct centers in Hyderabad.



Focus Area 4: Electronics and Semiconductors



1st city in India to envision an industrial park exclusively for semiconductor manufacturing – set up Fab City in 2006

World class infrastructure with red category environmental clearance; Support from TASK for Skilling; Friendly Labour Policies in the state

Govt. introducing open access to renewable energy for high tech industries. Dual grid power for the semiconductor industry

Recent Investments



Home to R&D and Design Centers



Electronics Hearables manufacturing; To employ 25,000 people

Manufacturing of Adv. Electronics

Presence of major players across Electronics value chain



Manufacturing of Mobiles & TVs

JV with Skyworth; manufact. 25% of LED TVs in India (Top Brands)

Electrical harnesses for advanced aircraft engines

Manufacturing of BLDC Motors and Electrical Appliances

Electricals system plant; Recognised as Japan India Inst. of Manufacturing



Optical Fiber & OFC manufacturing

Consumer electronics manufacturing

Smart Factory for Electronics safety products

R&D Centre, largest facility outside of China

Largest Global R&D Centre



Focus Area 5: Textiles and Apparel

Telangana is known for its **production of long staple cotton** - quality **highly regarded**

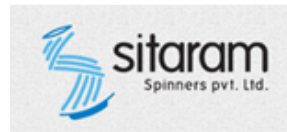
Telangana Textile & Apparel Policy (T-TAP)

1. 25% Capex subsidy up to Rs 40 Crore
2. Power Subsidy, SGST Reimbursement, Transport Subsidy, CETP O&M Reimbursement
3. 24X7 Water, Power, Connectivity, CETP at Textile Parks, Plug & Play Infra
4. Capacity building support & training subsidy

Presence of Technical Textiles / Spinning Companies



Presence of Apparel & Garments / Exports Companies



Kakatiya Mega Textile Park





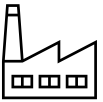
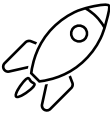


Focus Area 6: Aerospace and Defense

Availability of essential infrastructure such as **4 dedicated aerospace parks, 2 hardware parks and 50 general engineering parks**

Telangana State Innovation Policy (TSIP) and Hyderabad Aerospace and Precision Engineering Park (HAPE) driving collaboration and innovation

Hyderabad ranked as the **most cost-effective Aerospace city of future globally** by Financial Times FDA rank.

Highlights of Aerospace Sector in Telangana

| | | | |
|---|--|---|--|
|  | Largest Defence R&D and Manufacturing hub |  | 30% of parts produced for Mars Orbital Mission |
|  | First state to launch its Space and Drone Policy |  | 1500+ MSMEs catering to A&D and space sector |

Notable Facilities and Centers

- Safran’s largest aero engine MRO center
- Midhani – largest defense PSU in A&D materials
- National Remote Sensing Centre Headquarters
- National Centre for Additive Manufacturing

Presence of major sectoral players in Telangana



Focus Area 7: Automotives and EV




- Telangana is building **India's first dedicated mobility cluster called the Telangana Mobility Valley (TMV)**.
- TMV being developed as four mega clusters spreading over 3000 acres in and around Hyderabad to provide end to end ecosystem support and make the state the most competitive destination for EV manufacturing and R&D in India

Major Automotives & EV investments in Telangana



TMV features

-  **Experience Zone:** Innovation led immersion zone housing modern factory line using auto I4.0 tech
-  **Engineering Zone:** With shared proving grounds, testing & prototyping laboratories
-  **Manufacturing Zone:** With common facilities and well-established social and commercial infrastructure
-  **Innovation Zone:** Providing access to incubators, R&D labs, co-working spaces etc.
-  **Talent Zone:** With mobility focused skilling through ITIs, skill universities & CoEs at leading colleges

Focus Area 8: Food Processing



Telangana is a **leader in the production of turmeric, sweet orange, inland fisheries and seed business**

Food processing industry in Telangana **processes ~25% agri & allied output by value and adds 12.5% in value.**

India's **first fully integrated freshwater Aqua Hub** (for fish production, processing and export) is coming up Telangana

Telangana Production Profile

Rice: 26 Million MT (2nd largest producer in India)

Cotton: 6 million bales (3rd largest producer in India)

Maize: 3 million MT (3rd largest producer in India)

Poultry: Meat - 1 million MT (5th largest), Eggs – 16,670 million (3rd largest)

Special Food Processing Zones

- **20+** Special Food Processing Zones established across Telangana
- **10,000** acres of SFPZ
- Attracted **Rs 24,372** crores of investment
- Generated **2,43,720** employment

Presence of major players in Telangana

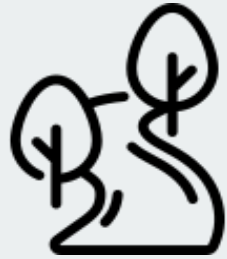




Flagship Projects / Initiatives



Flagship Projects and Initiatives (1/3)



MUSI RIVERFRONT DEVELOPMENT

- **The Musi River** - primary water source for Hyderabad for over a century.
- Plans are underway to **revitalize 55km river corridor over next 5 years**.
- The project involves **river restoration, environmental conservation, and creation of public and community spaces**.
- **25,000+ acres of land development** and **1.2 Billion Square Feet Built Potential** for Urban Infra, Office, Residence, Recreational, Green Spaces, Bridges and Iconic Squares - Will become a **Neo Hub of Culture, Commerce, Living**.



MEDICAL TOURISM

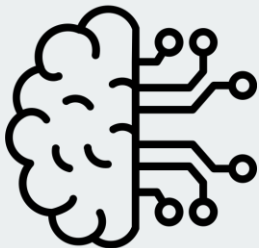
- Hyderabad is poised to capitalize on the convergence of healthcare and software, aspiring to become the **Medical Tourism capital of Asia**.
- Already leading destination for cataract surgeries, joint replacements, transplants, etc. with huge scope to expand further. Government aiming to broaden horizon and make Hyderabad an **attractive destinations for people from all geographies**.
- A **Global health hub is being planned in Hyderabad with over 20,000 beds** (with at least one block dedicated for Aarogyashri Patients) and exclusive Arena for International Medical Research.

Flagship Projects and Initiatives (2/3)



YOUNG INDIA SKILLS UNIVERSITY,

- Aim to make Telangana a **leader in skilled manpower within the next 5yrs**
- University set up in **PPP model with industry partners from different sectors**. Young India Skills University, Telangana (PPP) Bill passed by the state legislature and **Mr. Anand Mahindra appointed as the Chairperson** of the Board of Governors.
- Schools to offer degree, diploma and certificate courses in **18 different sectors**.
- **First set of courses launched in November** in temporary campus. Land identified and foundation stone laid for permanent campus.



AI CITY

- Artificial Intelligence (AI) City is aimed to create a **robust ecosystem for research, talent development and industry collaboration** in the state, enabling seamless integration of AI in key sectors such as **healthcare, agriculture, manufacturing, governance, and urban development**.
- It will be a part of Net Zero Future City and will include **Compute Infrastructure, Big Tech R&D Centers, AI Skills Institute, Centers of Excellence, AI Sandbox Testbed and Advanced Datasets and Platforms**.

Flagship Projects and Initiatives (3/3)



FUTURE CITY

- The government is developing a **Net-Zero Future City**, south of the Hyderabad Airport.
- The Future City will be **spread across 14,000 acres abetting a reserve forest area of 15,500 acres** and is being designed to embody “**Work, Live, Learn and Play**” concept.
- It will be an **integrated industrial smart city** with dedicated zones for Lifesciences, AI and Innovation, EVs, Electronics and Advanced Manufacturing, Universities, Sports, Entertainment, Medical Tourism and Eco-tourism.



REGIONAL RING RAIL

- Aligned with the proposed Regional Ring Road (RRR) as a **mass transporting alternative to Road networks**.
- Over **25 stations** planned at key hubs along the route.
- Will **decongest intra-city traffic** and enable affordable & fast transit of people & goods.



Shri. A Revanth Reddy
Hon'ble Chief Minister
Govt. of Telangana, India



Shri. Sridhar Babu Duddilla
Hon'ble Minister for IT & Industries
Govt. of Telangana, India