RAJASTHAN
THE LAND OF PROMISE
Honda Siel’s Plant at Tapukara

Key Highlights

Galloping on Economic Growth

Advantage Rajasthan

10 Access to Centres of Economic Growth
12 Robust Connectivity
14 Powering Growth
16 Skilled Manpower
18 Ready Infrastructure
20 Financial Incentives
22 Doing Business in Rajasthan

Sectors for Investment

30 Auto & Auto Components
34 ESDM
38 Healthcare
42 Defence
44 IT/ITeS
48 MSME
52 Renewable Energy
56 Tourism
60 Textiles
64 Mining & Ceramics
68 Agriculture
72 Support Infrastructure

78 Industry Speak
80 Contact
Front runner in building startup and entrepreneurship lead economy

Jaipur ranked second among emerging investment destinations in India

Skilling India first in private ITI capacity in the country

Land facilitation through state industrial development agency

CAGR of 5.7% in the period 2011-15

Access to 1/3rd of country’s GDP & population and India’s leading industrial centers

Rajasthan’s Neighbouring States

Sixth rank in ease of doing business index

Rajasthan ranked second among emerging investment destinations in India

India

Access to 1/3rd of country’s GDP & population and India’s leading industrial centers

Rajasthan’s Neighbouring States

EY India Attractiveness Survey 2015

HIGHEST number of solar plant commissioned

40% of DFC falls in the state

GSDP of INR 5.4 trillion in 2015-16 at constant prices

Rajasthan, located in the north-western region of India, has emerged as one of the fastest growing states in the country. With GDP of INR 5,440 billion at constant (2011-12) prices in 2015-16 and in the last four years, the GSDP grew at a CAGR of 5.7% at constant (2011-2012) prices. The per capita income in 2015-16 was INR 66,979 at constant (2011-12) prices and grew at a CAGR of 3.9% during the last four years. As per a study by D&B, the GSDP of Rajasthan is expected to grow at 9.9% during FY2016-17.

Traditionally, being an agrarian economy, the contribution of agriculture sector to GSDP was about 43%, and 57% from industry and service sector in 1990-91. After the wave of industrialisation and policy initiatives in Rajasthan, industry and services now account for 75.9% of contribution of GVA in 2015-16.

Industrial Scenario in Rajasthan

The industrial sector’s contribution to the State’s GSDP has been growing consistently. In the period 2010-15, the contribution from this sector grew at a CAGR of 6.53%.

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GSDP (in INR billion) at constant (2011-12) prices

Per Capita Income (INR billion at constant (2011-12) prices (INR)

Industrial Output (INR billion at constant (2011-12) prices)

Sector Composition of Contribution of GVA at Constant Prices

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Large Industries

Large industries continue to play a significant role in the economy of the State. This category of industry employed about 0.18 million people and has garnered fixed capital investment of about INR 1,222 billion till March, 2015. The three districts of Barmer, Alwar and Chittorgarh account for about 50% of investment in the State and the districts of Bhilwara, Alwar and Banswara employ about 55% of industrial workforce in the State.

Micro, Small and Medium Industries

Micro, small and medium scale industries contribute significantly to the backbone of the industrial sector in Rajasthan. The small scale industry forms a major portion of the number of industrial units in the State and has led to huge employment generation. The small scale industry is spread across various key clusters in the State. Some of the key clusters are Auto Component (Alwar), Handicraft (Dausa, Jaipur, Bagra), Pottery (Udaipur), Terracotta (Dungarpur, Rajsamand, Sirohi), Textile (Sikar, Jodhpur, Kota, Bikaner) among others. The MSME sector in Rajasthan cumulatively employed 0.72 million people and cumulative investment in the sector amounted to about INR 173 billion till March 2015. The three districts of Alwar, Jaipur & Udaipur account for about 56% of investment in MSME sector while the districts of Jaipur, Alwar and Jodhpur employ about 45% of MSME workforce.

Industrialisation & Employment: Leading Districts

All figures are cumulative till March 2015.
Source: Commissioner of Industries, Government of Rajasthan.
Rajasthan shares its boundary with the states of Punjab, Haryana, Madhya Pradesh, Uttar Pradesh and Gujarat along with proximity to Delhi. These regions present tremendous opportunity to investors with providing access to a large consumer facing market.

402 mn people live in these States, that is, one-third of India's population

30% of India's GDP is contributed by these States

33% of population in these States is urban

The combined growth of these states during the period 2009–14 was around 7% which was higher than the national growth rate.

Further, Rajasthan enjoys proximity to the largest urban conglomerate of Delhi-NCR region. The Delhi-NCR region is constituted of 20 districts which have high growth potential. Some districts have established a strong industrial base, providing investors in Rajasthan easy market linkage with respect to supply and demand. Some of the leading industrial centres such as Faridabad, Gurgaon, Panipat, Ghaziabad and Noida are within 350 km from Jaipur.
Rajasthan enjoys seamless connectivity with the rest of India through airways, railways and roadways.

- Direct air connectivity to 6 metro cities, 2 Tier-1 cities and 3 international destinations from Jaipur
- Rail length of 5,870 km in the State connecting key cities and to ports in Kandla, Mumbai and Mundra, Gujarat
- National Highways with length of 8,016 km and total road length of 2,08,341 km in the State connect to key cities such as Delhi, Ahmedabad, Vadodara, Mumbai, Bhopal, Agra, Gwalior, Indore and Amritsar
- Air-Cargo Complex at Jaipur, and Inland Container Depots at Jaipur, Jodhpur, Bhiwara & Bhiwadi facilitate trade within and outside India

**DMIC (Delhi-Mumbai Industrial Corridor)**

Dedicated Freight Corridor (DFC) is a 1,483 km long rail corridor connecting Jawaharal Nehru Port near Mumbai to Dadri near Delhi. DFC will allow high-speed connectivity for high-axle load wagons (25 tonnes) of double stacked container trains supported by high power locomotives.

A band of 150 km has been chosen on both sides of the DFC to be developed as the Delhi-Mumbai Industrial Corridor (DMIC).

Nearly 39% of DFC passes through Rajasthan, and about 61% of the State’s area and 81% population (in 22 districts including Jaipur, Alwar, Kota and Bhiwadi) fall in the project influence area.

5 DMIC nodes have been proposed in Rajasthan. For establishing the 1st node at Khushkhera-Bhiwadi-Neemrana, an estimated capital outlay of INR 226 bn has been budgeted. The node will drive the next level of economic growth in the region.
POWERING GROWTH

Through dedicated State and private sector initiatives, the State has now emerged as a near zero power deficit State and assures uninterrupted supply to industrial consumers. With firm steps to augment availability of power for industrial, commercial, domestic and agricultural consumption, Rajasthan has arrived at a total power generation capacity of over 17,281 MW with over 26% from renewable energy sources. To fuel industrial development, the State plans to add another 6500 MW in generation capacity over the next five years.

Installed power capacity grew at
CAGR OF 13.5% while renewable grew at 22.4% in the last 5 years

MoU’s of more than 40,000 MW signed with
leading players for solar parks & power generation

Hindustan Zinc’s facility at Dariba

Kota Thermal Power Station

MoU’s of more than 40,000 MW

Renewable

Powering
Growth

MoU’s of more than

40,000 MW

installed solar capacity

1259 MW

Installed Power Capacity (in MW)

2015-16

2013-14

2014-15

2011-12

2012-13

2016-17

2017-18
With a focus to strengthen the industrial scenario in Rajasthan, the State has emphasised on development of manpower in the State. The training capacity of Industrial Training Institutes (ITIs) in the State is around 0.23 million seats to ensure a steady supply of skilled manpower to industries in Rajasthan. Further, the Government has established 300 new skill development centres (SDCs), in collaboration with private partners, in all 33 districts of the State. Rajasthan has been awarded twice for the Best State in skill development at the Assocham’s Skilling India Summit-cum-Awards.
To facilitate industrial development in the State, the State Government has invested in developing industrial parks with basic infrastructure provided for. RIICO, a Government corporation, has pioneered industrialization and is responsible for setting up of industrial parks.

RIICO has developed 339 industrial parks with an area of more than 82,000 acres.

- Dedicated parks for textile, agro-processing, stone, gems & jewelry and SEZs for IT/ITeS, engineering, gems & jewelry and handicrafts.
- Dedicated Japanese & Korean zones. Japanese Zone-1 has attracted investment of INR 42 billion and employs more than 9,000 people.

Ease of doing business: No construction permit required for plot size less than 40,000 sft and deemed approval for larger plot sizes.

Rahimtown Business Park, Bhiwadi
**FINANCIAL INCENTIVES**

**Manufacturing Sector**
- Investment Subsidy @ 30% of VAT and CST for 7 years
- Employment Generation Subsidy up to 20% of VAT and CST for 7 years
- 50% exemption in Electricity Duty, Land Tax and Mandi Tax for 7 years
- 50% exemption in Conversion Charges for change of land use
- 50% exemption in Stamp Duty on purchase or lease of land
- Additional Investment Subsidy for Women/PwD/SC/ST to the extent of 10% of VAT and CST
- 100% exemption from Entry Tax, to the enterprise making investment more than INR750 crore

**Service Sector**
- Reimbursement of 50% of amount of VAT paid on purchase of plant and machinery or equipment for 7 years
- 50% exemption in Electricity Duty for 7 years
- 50% exemption in Entertainment Tax, Land Tax and Luxury Tax for 7 years
- 50% exemption in Conversion Charges for change of land use
- 50% exemption in Stamp Duty for purchase or lease of land
- Additional 10% reimbursement of VAT/CST paid, for Women/ PwD/SC/ST
- 100% exemption from Entry Tax, to the enterprise making investment more than INR750 crore

**Customized Package for:**
- Enterprise investing >INR400 crore or with employment > 400 persons
- Enterprise investing > INR200 crore using minerals which are available in abundance in the State
- Service Enterprise investing > INR500 crore or providing employment to > 500 persons

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**RIPS 2014**

The Rajasthan Investment Promotion Scheme 2014 (RIPS-2014) is a comprehensive package of attractive incentives for setting up businesses in the State. Besides a general package, the Scheme also offers incentives for investment in specific sectors such as ESDM, Textiles and MSME.

**Detailed Policy document is available at:** resurgent.rajasthan.gov.in

Scan to download RIPS 2014
Enabling Ease of Doing Business

Setting up business in Rajasthan

- Government of India has introduced online registration of Micro Small & Medium Enterprises (MSME) with a Unique ID – ‘Udyog Aadhar’. Udyog Aadhar has now replaced Enterprise Memorandum EM I and EM II. Rajasthan is among the first states to implement filing of Udyog Aadhar Memorandum completely online.
- The Single Window System facilitates application, approval, payment, clearance and tracking online through a single Unique ID.
- Government of Rajasthan has made it convenient for investors to make online application and payment through eMitra portal as well. The State has further established eMitra kiosks and Common Service Centers. An investor can visit these kiosks and centers to take assistance for making online application and payment.
Allotment of Land and Obtaining Construction Permits

- No construction permit/building plan approval is required in Rajasthan State Industrial Development and Investment Corporation (RIICO) industrial areas for plot size up to 40,000 sqm.
- RIICO does not seek any certificate for no-tax dues, notarised affidavit for not staking building material on public land, No Objection Certificate (NOC) from Traffic and Coordination Department and NOC from Storm-water and Drainage Department.
- Geographic Information System (GIS) for new RIICO industrial areas ready for allotment has been developed.

Complying with Environmental Procedures

- For 88 categories of industries that are Green industries, acknowledgment of the receipt of consent application (along with fees) serves the purpose of consent.
- Rajasthan Pollution Control Board (RPCB) Portal for submission of application, registration, renewal and issuing of certificates online. This portal allows for uploading of supporting documents required while applying for Consent to Establish and Operate (CTE/CTO).
- The certificates issued by RPCB are verifiable through a Quick Response Code (QR code). An individual can scan the QR code via phone as well and verify the details of the certificate such as name of the company and validity of the certificate.

Complying with Labour Regulations

- Labour Department Management System (LDMS) and Rajasthan Factories and Boilers Module (RAJ FAB) allows online filing of applications, registrations, licenses, renewals, payments and filing of returns under 12 major labour legislations and compliance with Chief Inspector of Boilers.
- With respect to installation and repair of boilers, no prior permission is required and the investor has been given the choice for selecting a competent person to certify the boilers. Further, annual renewal has been dispensed with.
- Under Factory Act, 1948, self-certification scheme in lieu of inspection under the Act has been implemented, thereby ending "Inspector Raj."
Obtaining Infrastructure related utilities
- Clear timelines defined for obtaining electricity connection, water connection, gas connection and sewage/sewer connection
- Single Window System facilitates online application, approval, clearance and tracking for electricity connection

Carrying out Inspections
- Joint inspection for Acts under labour and factories & boilers legislations
- Prior approval from higher authorities is required for inspection by labour inspectors and any establishment can be inspected only once a year
- Inspection reports issued within 72 hours for Environmental, Labour, Factories & Boilers and Tax registration, permits, legislations, etc.

Registering & Complying with Tax Procedures
- All processes related to registrations, assessment, filing of taxes and refunds are online
- Single ID for state commercial taxes
- State also facilitates online refund
- e-GRAS is an online Government Receipt and Accounting System which facilitates collection of tax/non-tax revenue online
- Professional tax has been repealed in the State
- There are no static check-posts and mobile squads in the State

In September, 2015 “Assessment of State Implementation of Business Reforms” published by the Department of Industrial Policy Promotion (DIPP), Government of India on the ranking of Indian states on ease of doing business, Rajasthan has led several Indian states in introducing business reforms. The DIPP assessment, conducted in partnership with the World Bank has ranked Rajasthan 6th among states recognised as Aspiring Leaders, the top 5 being Gujarat, Andhra Pradesh, Chhattisgarh, Jharkhand and Madhya Pradesh.

Among Top States recognised as ‘Aspiring Leader’
3rd in complying with environment procedures, registering & complying with tax procedures
4th in allotment of land & obtaining construction permits
5th in setting up a business; carrying out inspections
6th in over all rank; 61% implementation status
Alwar district, part of the NCR, contributes significantly towards the overall automobile production of NCR region. Currently, more than half of the cars, motorcycles and scooters in India are produced in the NCR region. Rajasthan has developed into an important automotive hub, with Bhiwadi, Neemrana, Pathredi and Alwar city in Alwar district being host to over 150 automotive and auto parts manufacturing companies. The auto industry in Rajasthan is present across the entire industry value chain. The State has attracted investments of over INR162.5 billion in two-wheeler, car, truck, bus/body building and off-road vehicle manufacturing from companies such as Honda, JCB, Ashok Leyland, Hero MotoCorp, etc. Rajasthan produces almost everything that goes into making of an automobile.
Ample Skilled Manpower
- 214 polytechnics with intake capacity of 56,735 students and 1,693 ITIs with intake capacity of 2,32,996 students
- Honda Vocational Training Center and R&D center of Hero MotoCorp Ltd.
- A Tool Room cum Training Center for automotive industry is being established in Bhiwadi region by Government of India
- Partnership with Nettur Technical Training Foundation (NTTF) and The Overseas Human Resources and Industry Development Association (HIDA), Japan

The competitive advantage of the State lies in its strategic market access, developed ecosystem for automotive industry, skilled labour, ready availability of large contiguous land parcels and uninterrupted power supply which are the prerequisites for any automotive industry to set up.
The Electronic System Design and Manufacturing (ESDM) industry in India is growing rapidly due to increasing demand, large talent pool and government initiatives. Government of India, through the Department of Electronics and Information Technology (DeitY), has instituted a number of forward-looking policies such as the National Policy on Electronics (NPE), Electronic Manufacturing Clusters (EMCs) Scheme, Electronics Development Fund (EDF), Modified Special Incentive Package Scheme (M-SIPS), and incentives for setting up semiconductor fabrication units. Rajasthan is positioned to offer the players in this sector unparalleled advantages to locate here, grow & benefit. The State is also emerging as the most favoured destination for auto, solar, power and ceramic & glass sectors. The input requirement of numerous companies in these industries will provide a ready market of ESDM players that choose to locate here.

Total ESDM market in India is estimated to have reached INR 6123 bn in 2015 & is expected to grow at CAGR of 9.9%
The huge & growing automotive industry based in and around the State is expected to be a major growth driver for the ESDM sector in Rajasthan. Currently, 25% of the auto components are electronics-based & this number is expected to go up substantially in coming years.

The State Government is keen to develop the ESDM sector and attract investments in developing mobile phones, LED TVs, solar panels, computer devices, ATMs and other electronic devices. Some of the large investors have expressed interest in setting up mobile phone manufacturing units in Rajasthan. Sectors such as automotive electronics, mobile phone manufacturing, solar manufacturing and defence electronics, hold tremendous investment potential for the State as foreign and domestic companies look to manufacture in India.

**Key Players present in Rajasthan**

-[Image]

**Special incentives for ESDM Companies**

Government of Rajasthan has taken various initiatives to create an ideal ESDM ecosystem in Rajasthan:

- 50 acres of land has been allotted to Electronic Industries Association of India (ELCINA) for setting up of EMC at Industrial Area, Salarpur, Khushkhera Ext area.
- 125 acres of land at Kadawas Extension, Udaipur reserved for developing dedicated zone for IT/ITES & Electronics industries.
- EMC is being planned at Karoli with a land of 120 acres.
- Special Economic Zone (SEZ) for IT including ESDM has been established by Mahindra World City at Jaipur.
- Government of India has notified Jaipur-Bhiwadi-Neemrana-Udaipur-Ajmer-Kota as Brownfield Electronic Manufacturing Cluster (EMC) for ESDM activities.

**The huge & growing automotive industry based in and around the State is expected to be a major growth driver for the ESDM sector in Rajasthan.**

**Demand-supply gap in the Indian ESDM industry (in INR billion)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total ESDM Market</th>
<th>Domestic Production &amp; services</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1,638</td>
<td>750</td>
</tr>
<tr>
<td>2011</td>
<td>1,937</td>
<td>1,000</td>
</tr>
<tr>
<td>2012</td>
<td>6,123</td>
<td>275</td>
</tr>
<tr>
<td>2013</td>
<td>26,000</td>
<td>750</td>
</tr>
</tbody>
</table>

**PROJECTS FOR INVESTMENT**

<table>
<thead>
<tr>
<th>PROJECTS</th>
<th>INVESTMENT (INR million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microwave ovens</td>
<td>275</td>
</tr>
<tr>
<td>Computer mouse, track ball etc.</td>
<td>750</td>
</tr>
<tr>
<td>Optical fibre cable</td>
<td>1,000</td>
</tr>
<tr>
<td>Computer Printers (Ink jet/Laser)</td>
<td>750</td>
</tr>
<tr>
<td>LED &amp; allied products</td>
<td>100</td>
</tr>
<tr>
<td>Mobile phones</td>
<td>2,500</td>
</tr>
<tr>
<td>Multilayer PCB</td>
<td>64</td>
</tr>
<tr>
<td>Antilock braking system</td>
<td>89</td>
</tr>
<tr>
<td>ATM/Cash dispensers etc.</td>
<td>1,500</td>
</tr>
</tbody>
</table>
Rajasthan is home to a large health delivery system with a large network of delivery centers, significant number of skilled medical resources and increasing participation of the private sector in tertiary care, health insurance and medical education.

Government of Rajasthan aims to transform the healthcare delivery in Rajasthan through enhancing public infrastructure, attracting private sector investments and successful implementation of National Health Mission and other schemes.

Due to increasing lifestyle diseases, growing awareness towards hospitalization and medical tourism, there is a large scope for hospitals in major cities of Rajasthan.

3rd State in India to launch a HEALTHCARE INSURANCE SCHEME which will provide healthcare cover of up to INR 3 lac covering 1700 ailments & is expected to cover 70% of population.
The demand for healthcare is growing rapidly in both rural and urban areas of the State. The vast majority of people both in urban and rural areas use the private sector for outpatient curative services as the first line of treatment. With the recently launched healthcare insurance scheme by the State Government, demand for super specialty hospitals in big cities as well as small hospitals and polyclinics in small towns, tehsils and at block level is expected to increase significantly, creating huge investment opportunities for private sector in the State.

To meet the growing demand for healthcare services, there is significant opportunity for the private sector to participate in developing medical, nursing, physiotherapy and paramedical training institutes in the State. Ready availability of skilled manpower will provide an impetus towards enhancing healthcare services in the State.

Presence of world-class hospitals, proximity to NCR, new State Insurance Scheme and availability of skilled manpower has strengthened State’s position to emerge as a preferred destination for medical tourism. Readily available land bank for establishing hospitals, educational institutions, and charitable organizations at concessional rates provides a tremendous support to private investors in Rajasthan.

**Investment Opportunities across different segments**

**Hospitals/Medical Institutions**
- Super specialty hospitals
- Medical & healthcare institutions in districts
- Polyclinics & small hospitals in towns, tehsils & block levels
- Medicity-like medical facilities

**Manufacturing**
- Pharma
- Formulations (packaging, bottling, tableting of drugs)
- Medical devices
- Medical equipment

**Medical Education & Research**
- Medical college
- Paramedical & nursing institutes
- Pharmacy colleges
- Skill development programs
- Research & development laboratories

**Healthcare Opportunities in PPP mode**
- Diagnostic centers/x-rays/cardiac centers in DHs/Medical colleges
- Mobile medical units/Health ATMs/Health kiosks
- Biomedical waste management
- Management and operations of public health facilities

**Key Players present in Rajasthan**
India has the third largest armed forces in the world. The allocation for defence in the 2016-17 budget is approximately INR 2,580 billion. Currently, around 60% of defence requirements are met through imports. The Government of India (GoI) has identified defence manufacturing as a key sector in its Make in India program, making it an attractive investment sector. Recent initiatives taken by GoI to attract investments in the sector include:

- Raised FDI limit to 100% and 49% under automatic route
- Equity holding greater than 49% permitted for “state-of-the-art technology” on CCS approval
- Digitised the application process
- Removed its restriction of the minimum 51% holding by a single Indian entity in a defence venture
- Identified 16 broad categories of defence items that are now allowed to be exported, bringing India at par with international laws governing arms trade
- Sharply reduced the number of products for which manufacturers require special licenses and extended the duration of defence licenses up to seven years

Key recent developments/announcements in Defence sector in India

- Indian players, L&T, SAAB, Textron, Bharat Forge, Punj Lloyd and Mahindra & Mahindra looking for partnership or have already formed joint ventures
- Tata Advanced Systems Limited (TASL) with Boeing and Mahindra Defence with Airbus Helicopters are examples of such partnerships
- US and India signed a 10-year defence pact towards joint development and manufacture of defence equipment and technology in India

INR 250 billion to be invested in the sector during next 7-8 years to avail defence offset obligation

Advantage Rajasthan

- Readily available large tracts of land for setting up defence units
- Established Automotive industry in NCR that can be leveraged for production of defence equipment
- State promoting ESOM industry that can be leveraged for promoting defence related electronics communications, radars, sonars and electronic warfare systems
- Well-established specialty steel/copper/brass tubes manufacturing units
- Defence being a thrust sector for the State, various incentives such as VAT, CST, Entry tax are provided under RIPS 2014

9 FOLD INCREASE

FDI inflows in 2014.

FDI Capital inflows of INR26 bn in 2014 (up from INR3 bn in 2013)
Rajasthan is emerging as one of the best locations in India to invest in the IT/ITeS sector with software exports growing at a CAGR of 35% between FY10-15. The State Government has taken all the required initiatives to promote and develop IT/ITeS sector by way of creating infrastructure in terms of IT Parks, communication infrastructure, earth stations & optical fibre based networks, availability of skilled and trained manpower through institutional set-ups and also customised packages of incentives to this sector.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Software Exports (INR mn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>3,670</td>
</tr>
<tr>
<td>2015</td>
<td>16,650</td>
</tr>
</tbody>
</table>

CAGR: 35%
Mahindra World City, Jaipur has established one of the largest SEZ with an area of over 460 acres, which hosts several leading IT/ITeS firms such as Infosys, Genpact, Deutsche Bank, etc. Mahindra World City is a well-planned business city designed on a plug-n-play concept. In addition to Jaipur, other major cities in Rajasthan like Jodhpur, Udaipur and Kota are also being developed as speed data communication centres by a number of telecommunication suppliers.

As per 2015 CII India Skills Report, Skilled Manpower in Rajasthan ranks 5th on behavioral traits (skills like learning agility, adaptability and interpersonal skills) which are preferred requirements for IT/ITeS employers.

Rajasthan has been ranked 5th in terms of total number of colleges and universities in India and houses an IIM, an IIT, BITS Pilani, NIT and an IIIT.

- 126 engineering colleges with a capacity of 58,633 and 77 MBA colleges with a capacity of 6,105 students

*An investor-friendly IT & ITeS Policy*

& the Rajasthan Incentive Scheme for BPO/KPO Centres are already in place

Jaipur has emerged as a preferred INVESTMENT DESTINATION among first-time investors in telecom and IT-enabled services
Bhagwati Metals, Ajmer

MSME sector is important for the socio-economic development of the State as the sector leads to higher economic activities and job creation. Rajasthan’s industrial landscape, comprising diverse sectors such as mining, textile, auto & engineering, agro & food processing, provides ample opportunities for MSME players. The MSME sector in Rajasthan has grown steadily and now is the largest employer after agriculture.

Investments in SSI units in Rajasthan grew at a CAGR of 19% in the last decade (2004-2014), and cumulative investment was INR239 billion. In the same period, employment grew at a CAGR of 23%.

Growth engine OF INDUSTRIAL SECTOR
Key Sectors under MSME Segment

Rajasthan produces 11% of country’s milk, 35% of goat meat and 31% of wool. There are around 20,000 agro-processing units in the State, making agro-processing the largest sector under MSMEs. Agro-processing units are also largest contributor (25%) to exports for Rajasthan.

Gems & Jewellery is 2nd largest export item of Rajasthan. More than 1300 exporters in this segment employ 2 lakh people in the State.

The State is the 7th largest producer of plastics in the country. About 1300 plastic manufacturing units currently employ about 3 lac people.

Jaipur is the hub of Garment exports with almost 300 units operating. With about 2500 garment manufacturers and exporters, garments account for annual exports worth INR850 crore, of which INR500 crore is from direct exports.

Mineral grinding is concentrated in Beawar. There are 150 grinding units of quartz & feldspar in this cluster and 50 new units are in pipeline. 85% of the grinded mineral goes outside the State for industrial use in glass and ceramic, rubber & paint industry.

Handicraft is the 6th largest export item from Rajasthan. Over 500 handicraft manufacturing and export units are operating in the State.

Engineering Cluster: Jodhpur has a concentration of more than 100 units engaged in manufacturing of stainless re-rolling and fabrication.

For registration of entrepreneurs and to promote ease of doing business, Government of India has come out with a one-page Udyog Aadhaar Memorandum (UAM). Rajasthan has been proactive in implementation of this scheme and has made significant progress in generating UAMs.

MSME Policy 2015 has been recently announced and aims at strengthening of pillars driving growth of the MSME sector.

Brief highlights of the Policy

- Incentives available under Rajasthan Investment Promotion Scheme 2014
- Interest Subsidy to unemployed youth, women, educated unemployed women and SC/ST, etc. under Chief Minister’s Employment Generation Programme, 2015
- Assistance for setting up CETP by Industry Association / SPV – land at 50% cost and 50% of capital cost
- Marketing & quality support through organization of Fairs, Expositions, Buyer-Seller meets, assistance in vendor development program, linkages for Handicrafts through e-commerce platforms
- Plug-and-Play facilities for easy entry and exit and flatted factory complexes at subsidised prices
- Rapid incubation centers in each district to encourage unemployed youth and entrepreneurs to set up business

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Rajasthan is one of the largest contributors to India’s renewable capacity expansion program. Rajasthan Renewable Energy Corporation (RREC) was set up in the year 2003 to act as state nodal agency for single window clearance of the renewable energy projects in the State. Rajasthan is a pioneer in solar energy. It approved two solar power projects, each of 5 MW, under Generation based Incentive Scheme, as early as in 2008.
25% of installed power generation capacity in Rajasthan is through renewable means. Rajasthan is 4th in terms of total installed wind-power capacity. It has the potential to develop 18,770 MW of wind power capacity. The existing installed capacity is 3,552 MW. MoUs worth more than INR 190 Bn have been signed in the solar energy sector. Jaisalmer Wind Park is the largest operational onshore wind farm in India.

Rajasthan receives maximum solar radiation intensity (5.5-6.5 kWh/m²/day) in India for most part of the year (300-330 clear sunny days). Blessed with such conducive conditions like perennial and abundant solar radiation, along with vast unutilised low cost desert land, Rajasthan is poised to become the hub for solar power technologies. Rajasthan Solar Energy Policy 2014 targets to develop 25,000 MW of solar energy in the State. The State has about 97 MW installed capacity of Biomass energy. About 4,555 MW Biomass power potential has been identified for Rajasthan.

Reliance, Adani, Essel, Sun Edison, Azure and IL&FS have signed MOUs of 40,000 MW to setup solar plants and parks.

Source: MNRE Statewise list for Target year 2022
Direct & Young Directorate: Emerging & High Renewable-Energy Growth Potential
12th Five Year Plan (2012-17), Planning Department, Government of Rajasthan
The Policy documents are available at: resurgent.rajasthan.gov.in
Tourism’s contribution to the State’s GDP is 13.4%, much higher than the world average of 9%.

Tourist Arrivals in Rajasthan (Mn)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourist Arrivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>8</td>
</tr>
<tr>
<td>2010</td>
<td>26.8</td>
</tr>
<tr>
<td>2014</td>
<td>34.6</td>
</tr>
<tr>
<td>2015</td>
<td>36.6</td>
</tr>
</tbody>
</table>

Rajasthan is blessed with majestic forts, vibrant wildlife, golden sand dunes and holy temples. The exemplary art & tradition is mirrored through its myriad folklore, handicrafts and handlooms. Having consistently been awarded as a Preferred Tourist Destination, the State boasts of some of the finest hotel properties in India. The sector has witnessed further 220 investment MoUs signed worth more than INR 100 Bn.
73% of India’s Heritage Hotels are located in Rajasthan.

3rd Award for Comprehensive Development of Tourism by Ministry of Tourism.

5th Place awarded to Palace on Wheels among global luxury trains by Readers’ Travel Awards 2015 - Conde Nast Traveller.

Eight UNESCO World Heritage sites in Rajasthan – highest in India for any state.

Tripadvisor Travellers’ Choice Awards 2015 has rated Jaipur as India’s most Favoured Destination.
Over last few decades, Rajasthan has emerged as a promising textile hub. Abundance of raw material, rich textile heritage and trained manpower have promoted growth of the textile industry in the State.

Set up Textile Unit at zero or NEGLIGIBLE INTEREST on term loan in most sectors of Textile.
Highlights

+ Largest employer and largest contributor to Rajasthan’s exports
+ Highest production of blended fabric — CAGR of 5.9% during 2010-14
+ Highest production of synthetic suiting. Bhilwara has emerged as India’s largest manufacturer of PV blended yarn and PV fabric/suitings.
+ Pali, Balotra & Jodhpur — Prominent centres in India for processing of low weight, low cost fabric.
+ Highest cumulative production of blended yarn in India during 2011-14, with a CAGR of 4.4%.
+ Production of Non-cotton yarn — CAGR of 10.4% during 2010-14 compared to national production which declined at a rate of 4.4% in the same period.
+ Number of installed rotors in the State grew at a CAGR of 10.9% vis-à-vis national CAGR of 2.1% during 2010-14.
+ Jaipur is a hub for export of fashion garments.
+ Rajasthan is famous for textile handicrafts, hand printed fabrics from Sanganer and Bagru, Tie & Dye Fabrics, Kota Doria Fabric, etc. Further, the State has also been granted Geographical Indication for Kota Doria.

Incentives for Textile Industry from Government of Rajasthan

Rajasthan Investment Promotion Scheme (RIPS): Enterprises making a minimum investment of INR 5 Million in the textile sector will be granted the following benefits:

- 5% interest subsidy
- Additional 1% interest subsidy for enterprises making investment of more than INR 250 Million
- 7% interest subsidy for Technical Textile sector

RIICO: For the loans from RIICO, a rebate of 2% on the prevailing rate of interest is admissible for timely payment of principal and interest. Additionally, a rebate of 1% is also given under the Incentive Scheme for good borrowers.

The incentive under RIPS are valid for textile machinery covered under the Technology Upgradation Funds Scheme of Government of India. The above mentioned support is over and above the support for sector from Government of India under which the maximum interest subsidy on the term loan is at 6%. Hence, for the eligible textile units in Rajasthan, the net interest rate applicable on term loans is 0% or negligible.

Opportunities for Investment in Textile Sector in Rajasthan

Blended Yarn and Fabrics

Rajasthan is the leading producer of blended yarn and fabrics. Installed capacity of spindles in Rajasthan is at 1,81,419 nos., growing rapidly with increasing investments. The total yarn export for 2014-15 is INR 20 billion.

Fabric for Garment Industry

- Rajasthan is a major producer of printed and dyed fabric for fashion industry.
- Owing to the high production of apparels in the State, the linked demand for fabric for garment production is also growing.

Garments

- With highest production of PV suiting fabric, Rajasthan is the most appropriate destination for manufacturing formal men’s wear.
- Existing industry base and availability of trained manpower make Rajasthan a preferred choice for venturing into manufacturing of fashion garments.

Technical Textiles

Rajasthan has emerged as an important automotive hub which entails a direct demand for Mobiltech products.

Textile Handicrafts & Madeups

Textile Handicrafts from Rajasthan are famous all over the world. Investment opportunities exist across the spectrum of textile handicrafts, e.g. hand block and screen printing, quilting, khadi and Kota Doria.
Rajasthan is endowed with both, metallic and non-metallic minerals. 57 of 79 minerals are being commercially exploited, of which 20 are major minerals and 37 minor minerals. Some of the metallic minerals being produced include copper, lead, manganese, cadmium, etc. State also has 3 actively mined fuel minerals i.e. lignite, natural gas and petroleum (crude oil).
Major minerals used in ceramic industry and abundantly available in the State include ball clay, fire clay, silica sand, feldspar, gypsum, china clay, limestone and dolomite. State has signed MoUs worth INR 764 Bn in the sector.

Ceramic & Glass Zone

Around 500 ceramic units covering the value chain are operating in the State. An exclusive Ceramic & Glass Zone over 650 acres is being planned at Ghiloth near Neemrana.

Revenue Contribution to Government (INR bn)

<table>
<thead>
<tr>
<th>Year</th>
<th>Value (INR bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>15</td>
</tr>
<tr>
<td>2014</td>
<td>30</td>
</tr>
</tbody>
</table>

Key Players present in Rajasthan

1. Kajaria Ceramics Ltd.
2. Shree Cement’s Limestone Mines in Raas, Pali
Agriculture contributes about 24% (at constant prices 2011-12) to the State Domestic Product. The water from the Indira Gandhi Canal (Rajasthan Canal) is now helping in the cultivation of a handsome crop of citrus fruits, including tangerines, oranges and lemons. Agriculture sector in the State enjoys many distinctions with respect to other states in India.
Opportunities for Investments in Agriculture Sector in Rajasthan

Mega Food Parks
Mega Food Park Scheme is considered to be an inclusive concept aimed at establishing “direct linkages from the farm to processing and on to the consumer markets”, through a vast network of collection centres and primary processing centres.

Agro-Processing

**Oranges**
Rajasthan is the 4th largest orange producing state in India. Oranges are grown in Jhalawar, Kota, Baran and Chittorgarh areas of Rajasthan.

**Kinnow**
Rajasthan is amongst largest producers of kinnows in India.

**Pomegranate**
The State ranks 8th in India in production of pomegranate. Pomegranate is grown in Rajasthan in the areas of Jaipur, Ajmer, Alwar, Tonk, Sriganganagar, Kota, etc.

**Guargum**
India accounts for 90% of the world’s guargum produce, of which 72% comes from Rajasthan. Hanumangarh and Bikaner are the leading guargum producing districts.

**Spices**
Rajasthan is the third largest spice producing State in India.

Rajasthan has a share of 12% of national production of spices. Rajasthan was the biggest producer of ajwain (carom), coriander seeds and fenugreek. Rajasthan was also highest in production of seed spices like cumin, dill seeds and fennel.

**Barley for Malt**
Rajasthan is amongst the biggest suppliers of barley for malt used by the breweries for production of beer across India. Rajasthan accounts for 51.4% of India’s production of barley.

**Maize**
Mewar region has a vast production and as such provides scope for maize-based processing plants which may include starch plant, corn syrup preparation, various enzymatic preparations, etc.

**Isabgol Processing**
In spite of more than 80% of country’s production, the State has inadequate processing facilities.

**Potato Processing**
Bharatpur and Dholpur districts have sizeable volume of potato production but no processing plant.

**Dehydration of Onion and Garlic**
Rajasthan is the 3rd largest garlic producer in India with a share of 17% in the country's production. The vegetable is grown mostly in the areas of Baran, Chittorgarh, Jhalawar and Jodhpur. There is a good market for onion and garlic flex and powder.

Horticulture
There is a good opportunity for investing in the horticulture in NCR, as many vegetables such as brinjal, cabbage, cauliflower, etc. are grown in Alwar, Jaipur, Bundi, Tonk, Ajmer and other parts of the State.

**Warehousing and Supply Chain**
Development of an end-to-end supply chain for vegetables shall reduce post harvest losses and efficient transport system shall move them at marketing/distribution hub. This shall enhance farmers’ income. Thus investment in supply chain, which includes procurement centres, pack houses, transport vehicles, cold storages and improved marketing infrastructures are avenues of investment.

**Processing of Herbal Products**

- **Amla/Aonla**
India is the biggest producer of Aonla/Amla (Indian Gooseberry) in the world with Rajasthan being the 3rd largest producer of Aonla in India.

Henna Processing
Gujarat, Madhya Pradesh and Punjab farm henna, primarily to be sold as hair dye. Rajasthan henna farms often produce body art quality henna. Sojat and the surrounding areas in the Pali district of Rajasthan are the most intensive henna cultivation areas in India.

Animal Husbandry
- Breeding of animals
- Bulls, horses, and camels
- Sheep for wool and milk
- Mobile treatment facilities for animals
- Modernisation of slaughter houses
- Dairy Farming

Agriculture has witnessed 20 MoUs signed with GoR. These MoUs are worth INR 41.43 Bn with projected employment for 9,674 workmen.
SUPPORTING INFRASTRUCTURE
BACKBONE FOR INCLUSIVE GROWTH

By the end of the XII Plan (2017) period, urban population of Rajasthan is projected to be 27% of its total population. The urban settlements are likely to go up to 330 from 297. More than 57% of the urban population is concentrated in 20 class-1 towns.
Rapid urbanisation presents a unique opportunity for Rajasthan to undergo a planned inclusive development process and mitigate negative impact of unplanned urbanisation.

An investment of INR 10,000 Crores for the State highways has been announced besides investments in smart cities, AMRUT Cities and Chief Minister’s housing for all scheme.

Opportunities in Infrastructure

Smart Cities

Jaipur, Ajmer, Kota and Udaipur identified to be developed as smart cities. Each city will receive INR 1000 Crores per year. An equal amount, will have to be contributed by the State/Urban Local

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As per census 2011, 25% of population in Urban Areas by 2030, average 47% of population to be living in town & cities of India.

Opportunities in Infrastructure

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Bodies,

Atal Mission for Rejuvenation and Urban Transformation (AMRUT)
29 cities selected under the mission. Each city shall receive INR1 bn for a period of 5 years to provide basic services to households and build amenities

Heritage City Development and Augmentation Yojana (HRIDAY)
Ajmer to be developed under HRIDAY by GoI. INR400 mn has been earmarked for the city with duration of 27 months (completing in March 2017)

Housing for All Scheme (Pradhan Mantri Awas Yojana)
The mission will support construction of houses upto 30 sqm carpet area with basic civic infrastructure. 40 cities have been selected from Rajasthan under the scheme.

Chief Minister’s Jan Awas Yojana, 2015
To achieve the objective of affordable housing for all, development of EWS/LIG housing to bridge shortage.

Roadways
PWD: PWD’s projects worth INR56.3 bn are to be completed in the immediate future.

NHAI: MoRTH has identified 11 nos. of state roads with length of 1491 Km to be declared as National Highways in Rajasthan with total expenditure amounting to INR30.23 bn

JDA: JDA shall be taking up projects for road at INR5 bn every year for the next 4 years.

Construction of ROBs and RUBs: The work on 5 ROBs on DFC route is yet to be started.

Bharatmala Pariyojana: Approx. 1500 km road network to be developed in the State to improve connectivity in border area.

Jaipur Metro Rail Corporation: The Phase II of Jaipur Metro Rail is to be implemented with a total outlay of INR100 bn.

DMIC: 5 industrial nodes to be developed in DMIC

Other Projects
- Rejuvenation of Amanishah Stream, Jaipur
- Mapping of Underground Utilities & Ducting, Jaipur
- Integrated Townships: Dausa, Kishangarh, Hanumangarh, Dungarpur, Chakki, Abu Road, Bahadra, Sambhar, Puskar, Sumerpur, Sheegarh and Suratgarh.
- Slum Redevelopment in Jaipur, Jodhpur and Udaipur
- Bicycle Mobility Services: Jaipur, Jodhpur, Udaipur, Kota, Ajmer, Pushkar and Jaisalmer

Key Players Present in Rajasthan

Source:
Urbanisation in Rajasthan: Census 2011
4th Largest Road Network in Country (2nd rank in NH) (Source: Infrastructure Statistics 2014; Ministry of Statistics and Programme Implementation, GoI)
PWD’s works worth INR9.2 bn are to be completed in the immediate future (www.pwd.rajasthan.gov.in).
Connectivity of the site is excellent and the bureaucracy and political leadership were
very pro-active in assisting us through the entire process of getting approvals.
Vipin Sondhi
Managing Director, JCB India Ltd

Of 46 investors from Japan to Neemrana, 40 Japanese companies are already operating here. Big names also joining there are Daikin, Unicharm, Nissin Brakes, Mitsubishi Chemical, Mitsui Chemical... I believe, the State is one of the most favorable investment destinations for the Japanese.
N Noguchi
Chairman & DG, JETRO

The State has climbed several notches up to be at the 6th position in the country in terms of Ease of Doing Business. Rajasthan is really poised in an enviable way in projecting itself as a State which is serious about Ease of Doing Business as well as ensuring a good share of return on investment to the investors.
Lafarge is very satisfied with the investment climate in the State of Rajasthan. We also used the Single Window Clearance system of the State, which helped us a lot for the efficient implementation of the project.
Martin Kriegner
Country CEO, Lafarge India

As a business location, Jaipur stands out for its location and connectivity, excellent infrastructure, low start-up and running costs and good availability of trained manpower.
Anand Mahindra, Chairman & MD, Mahindra & Mahindra Ltd

Cities of Rajasthan offer a good pool of qualified young manpower and low operating costs. Infosys is happy to have located in Jaipur and plans to further strengthen its presence here.
S. D. Shibulal
CEO & MD, Infosys

The first thing we felt is the proactiveness and openness of the government... they are genuinely looking forward to help investors... their orientation towards the labour front is very practical which is sort of a very progressive outlook.
Pawan Munjal
Vice-Chairman & MD, Hero Motocorp Ltd

Barmer Oil and Gas Block in Rajasthan has contributed immensely towards meeting India’s domestic crude requirement. It is a world-class resource base with immense possibilities. Continuous commitment and support from Government of Rajasthan has played a vital role in realizing its true potential, benefitting all stakeholders.
Mayank Ashar
MD & CEO, Cairn India Limited

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Bureau of Investment Promotion

The Bureau of Investment Promotion (BIP) is the agency in charge of investment promotion and single window clearances in the state of Rajasthan, India. BIP also plays a significant role in developing investment policies for the State. BIP provides support to investors during the exploratory phase, implementation phase and during the operational phase of project.

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