

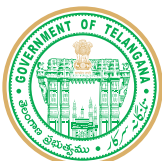


Shri K. Chandrashekar Rao
Hon'ble Chief Minister



Shri K. T. Rama Rao
Hon'ble Industries Minister

ANNUAL REPORT | 2022 2023



Industries & Commerce Department
Government of Telangana
Hyderabad, India

Index

From the Minister's Desk	3
Key Achievements	4
Economic Growth	6
TS-iPASS	9
EoDB & Invest Telangana	10
Telangana State Industrial Infrastructure Corporation (TSIIC)	12
Pharma and Life Sciences.....	15
Food Processing.....	24
Aerospace and Defence.....	28
Automotive & EV	33
Handlooms & Textiles	37
Logistics	42
Toys	45
Retail and eCommerce	47
MSME	48
Telangana State Leather Industries Promotion Corporation Limited (TSLIPC)	51
Telangana State Trade Promotion Corporation (TSTPC).....	52
Sugar Department	54
Research and Innovation Circle of Hyderabad (RICH)	57
Telangana Industrial Health Clinic Ltd (TIHCL).....	62
Digital Employment Exchange of Telangana (DEET)	63
Telangana Social Impact Group (T-SIG)	65
Industry Events	68
Awards and Recognition	70
Contacts	71

From the Minister's Desk



Telangana celebrated nine years of its formation on 2nd of this June. The State economy has continued its good performance with a GSDP growth rate of 15.6% at current prices in FY 2022-23. At constant prices, Telangana's GSDP is at 7.45% compared to India's GDP growth rate of 6.95%. Telangana's per capita income jumped to Rs. 3,17,115/- this year compared to India's at only Rs. 1,70,620/-.

In FY 2022-23, Telangana attracted major investments due to the proactive efforts of the Government. Telangana participated in two Davos events in May 2022 and January 2023 and attracted cumulative investments of over Rs. 25,200 Crs. Companies such as 3F Industries, BSV Global, Ashirvad pipes, Biliti Electric, Fishin' Company, Lulu Group, Hyundai, Ganesh Group, Kitex, Sahajanand Medical Technologies, Voltly Energy, Rajesh Exports, Stadler Rail, VEM Technologies, Agger Technologies Pvt. Ltd., Amara Raja Batteries Ltd., Gemini Edibles & Fats India Ltd., Daifuku, Hatsun, Indian Immunologicals Ltd., Page Industries, Malabar Gems & Jewellery, Allox, Blackberry, Eurofins, Bristol Myers Squibb, Foxconn, Apollo Tyres, Foxx Life Sciences, SGD Pharma-Corning Inc., Gland Pharma, TUV Rheinland and ATS, Godrej Agrovet, among others chose to invest in our State. We also inaugurated facilities of Advance Auto parts, Callaway Golf Company, Ferring Pharmaceuticals, Fisker Inc., Google, Thermofisher, Wipro, Alpha India, DFE Pharma, DifGen Pharmaceuticals Inc., M G Automotives EV Park, Safran, Titan Watches, G V Research Platform, Vimta Labs, Yapan Bio, Rx-Propellant and ITC Ltd.

There were several repeat investments from companies such as GMM Pfaudler, P&G, Ravi Foods Pvt. Ltd., Biological E, Mivi, Nicomac Taikisha Cleanrooms Pvt. Ltd., Schneider Electric, Infor, Mahindra & Mahindra and Welspun. This clearly reflects the positive investor supporting ecosystem of Telangana.

We inaugurated three major facilities developed by Govt. of Telangana of T-Hub 2.0, T-Works, which is the largest prototyping centre in India and the new Telangana Govt. Secretariat. Major events organized by the Govt. during the year were Bioasia, Hyderabad E-Mobility Week and Food Conclave.

Telangana through its flagship initiative of **TS-iPASS** attracted Rs. 26,791 Crs. of investment in FY 2022-23 through 3,191 new industries and created employment for 1,02,099 people. Cumulatively TS-iPASS has attracted 22,745 industries so far, investments of Rs. 2,60,060 Crs. and created employment for 17.54 lakhs people.

TSIIC developed 19 new Industrial Parks on 8,560 acres of land in FY 2022-23. So far it has developed 109 new

Industrial Parks on 35,581 acres of land during FY. 2014-23. The **Life Sciences sector** attracted 240 investments with an amount of Rs. 3600 Crs. and proposed employment generation of 17,247 in FY 2022-23. Cumulatively, since 2014, the sector has attracted investments worth 25,000 Crs. with employment generation of more than 4.5 lakhs. The **Food Processing** sector has generated investments of Rs. 6,864 Crs. leading to establishment of 3,807 units, and creation of 80,000 employment opportunities since 2014. Telangana in **Aerospace & Defence** sector won the Best State Award from Ministry of Civil Aviation consecutively for the third time in a row (2018, 2020, 2022), for being the Indian State with the most forward outlook towards Aerospace & Aviation sector and as one of the most cost-effective global aerospace hubs. Under **EV sector**, Telangana Mobility Valley (TMV) which is India's first and one-of-its-kind New Mobility focused cluster was launched in February 2023 during Hyderabad E-Mobility Week. TMV aims to attract investments of Rs. 50,000 Crs. and generate more than 4 lakh jobs in the next 5 years. In the last nine years, **Handlooms & Textiles** sector has attracted total investments of Rs. 6,496 Crs. with employment potential of 43,370 people.

UK Headquartered real estate services giant, Savills released the report '*Hyderabad: The Sprint*', stating that Hyderabad is surging ahead as the economic powerhouse of India. In FY 2022-23, Telangana was selected in 'Top Achievers' category in the implementation of Business Reforms Action Plan (BRAP) 2020. Telangana was also placed among the 'Top Performers' in the State Start up ranking 2021. Telangana ranked No. 2 in India Innovation Index 2021 and the Innovation ecosystem enabler T-Hub won the 'Best Incubator in India' award. Telangana also topped the country in digital governance with maximum e-transactions of 1.58 lakhs per 1,000 population between June 2014 and January 2023. Hyderabad City bagged the prestigious World Green City Awards 2022 by International Association of Horticultural Producers (AIPH).

The progress achieved and accolades won in FY 2022-23 have been exceptionally good and I hope that in the coming year our state will continue to strive to be the best not only in India but also globally. I look forward to continued support from industries, associations, and local stakeholders in realizing the vision of our Hon'ble CM of '*Bangaru Telangana*'.

Shri K. T. Rama Rao
Hon'ble Industries Minister

Key Achievements



In a major achievement, Telangana was selected in India's 'Top Achievers' category in the implementation of the Business Reforms Action Plan (BRAP) 2020. The report was released by Finance Minister Nirmala Sitharaman in 2022 where States and UTs were ranked under four categories like top achievers, achievers, aspirers, and emerging business ecosystems.



Telangana was placed among the 'Top Performers' in the States' Startup Ranking, 2021 by the Department for Promotion of Industry and Internal Trade (DPIIT).

Telangana ranked No. 2 in India Innovation Index 2021, which ranks states and union territories on the basis of 66 indicators such as human capital, investment, knowledge diffusion, and business environment.



Key Achievements

Innovation hub and ecosystem enabler T-Hub won the 'Best Incubator in India' award in the 3rd edition of National Startup Awards 2022 on National Startup Day. T-Hub emerged as the winner in the category for its efforts to support the growth of the startup ecosystem in Telangana.



Electronic Transactions



Telangana tops the country in digital governance with maximum e-transactions of 1.58 lakhs per 1,000 population between June 2014 and January 2023.

Rajanna Sircilla District and Peddapalli District of Telangana received 1st and 3rd ranks respectively in the quarter Oct-Dec 2022 under Swachh Survekshan Grameen 2023, in 4-star categories. Khammam District secured 1st rank in the 3-star category.



WORLD GREEN CITY AWARDS 2022

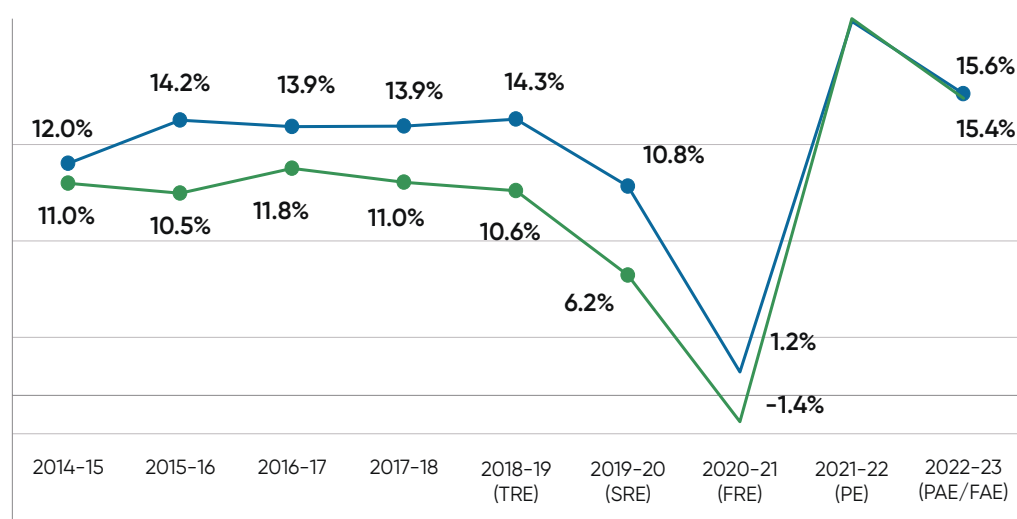
Hyderabad City bags the prestigious World Green City Awards 2022 by International Association of Horticultural Producers (AIPH). The award was given to the Telangana Government's massive green initiative – 'Haritha Haram'. AIPH has also chosen Hyderabad for 'Living Green for Economic Recovery and Inclusive Growth' Award.

Economic Growth

In 2022-23, Telangana's Gross State Domestic Product (GSDP) at current prices was Rs. 13.27 lakh Crs. Telangana's GSDP at current prices was increased by 15.6% in 2022- 23.

Telangana's nominal growth rate exceeded that of India's by 1.0 percentage point in 2014-15. The gap increased to 4.6 percentage points by 2019-20, declining thereafter as the pandemic hit the entire country in 2020-21, and as the pan-Indian economy recovered from the pandemic in 2021-22. In 2022-23, Telangana's nominal GSDP was 15.6% higher in comparison with the previous year, and India's nominal GDP had increased by 15.4%.

Growth Rate of GDP vs GSDP at Current Prices for India and Telangana (2014-15 to 2022-23)



Contribution of Telangana's GSDP to India's GDP at Current Prices (2014-15 to 2022-23)

	2014-15	2015-16	2016-17	2017-18	2018-19 (TRE)	2019-20 (SRE)	2020-21 (FRE)	2021-22 (PE)	2022-23 (PAE/FAE)
Telangana	5,05,849	5,77,902	6,58,325	7,50,050	8,57,427	9,50,287	9,61,800	11,48,115	13,27,495
All-India	1,24,67,959	1,37,71,874	1,53,91,669	1,70,90,042	1,88,99,668	2,00,74,856	1,98,00,914	2,36,64,637	2,73,07,751
Contribution	4.1%	4.2%	4.3%	4.4%	4.5%	4.7%	4.9%	4.9%	4.9%

Year-on-year GSDP vs GDP at constant prices (in Rs. crore)

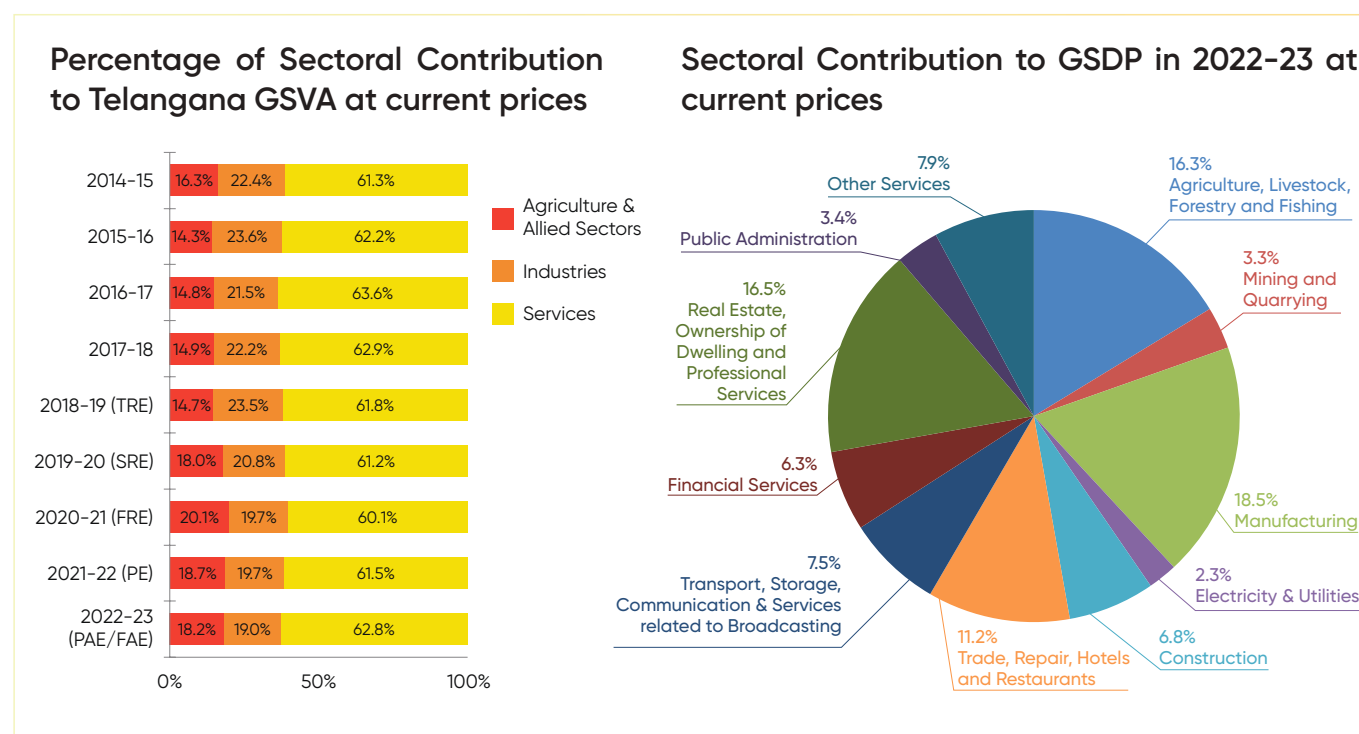
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19 (TRE)	2019-20 (SRE)	2020-21 (FRE)	2021-22 (PE)	2022-23 (PAE/FAE)
Telangana	3,89,957	4,16,332	4,64,542	5,07,946	5,57,410	6,08,401	6,41,244	6,09,927	6,76,304	7,26,670
All-India	98,01,370	1,05,27,674	1,13,69,493	1,23,08,193	1,31,44,582	1,39,92,914	1,45,15,958	1,35,58,473	1,47,35,515	1,57,60,363

Economic Growth

Telangana's Year-on-year GSDP vs GDP at constant prices in percentage 2014-15 to 2022-23

	2014-15	2015-16	2016-17	2017-18	2018-19 (TRE)	2019-20 (SRE)	2020-21 (FRE)	2021-22 (PE)	2022-23 (PAE/FAE)
Telangana	6.76%	11.58%	9.34%	9.74%	9.15%	5.40%	-4.88%	10.88%	7.45%
All-India	7.41%	8.00%	8.26%	6.80%	6.45%	3.74%	-6.60%	8.68%	6.95%

- The Agriculture and Allied sectors in Telangana achieved a year-on-year growth in Gross Value Added (GVA) (current prices) of 11.9% between 2021-22 and 2022-23. This is a 2.2 percentage points increase in the growth rate over the 2021-22 growth rate. Since the sector employs 45.8% of the population of the state, its economic success is crucial to improving the living standards in Telangana
- The Industrial sector in Telangana achieved a growth of 10.5% in 2022-23
- The Services sector – the primary contributor to the state's economic growth – witnessed a remarkable growth of 17.5% in its GVA at current prices in 2022-23



Sectoral Composition of GVA at Current Prices for India (2014-15 to 2022-23 PAE/FAE)

	2014-15	2015-16	2016-17	2017-18	2018-19 (TRE)	2019-20 (SRE)	2020-21 (FRE)	2021-22 (PE)	2022-23 (PAE/FAE)
Agriculture & Allied Sectors	20,93,612	22,27,533	25,18,662	28,29,826	30,29,925	33,58,364	36,09,494	39,80,067	44,77,171
Industries	34,48,189	37,66,249	40,97,108	45,28,864	49,91,798	49,37,703	48,57,375	61,26,167	70,42,576
Services	59,62,478	65,80,718	73,49,430	81,46,976	91,53,406	1,00,59,042	95,90,940	1,12,43,165	1,32,06,468
Total	1,15,04,279	1,25,74,500	1,39,65,200	1,55,05,666	1,71,75,129	1,83,55,109	1,80,57,809	2,13,49,399	2,47,26,215

Economic Growth

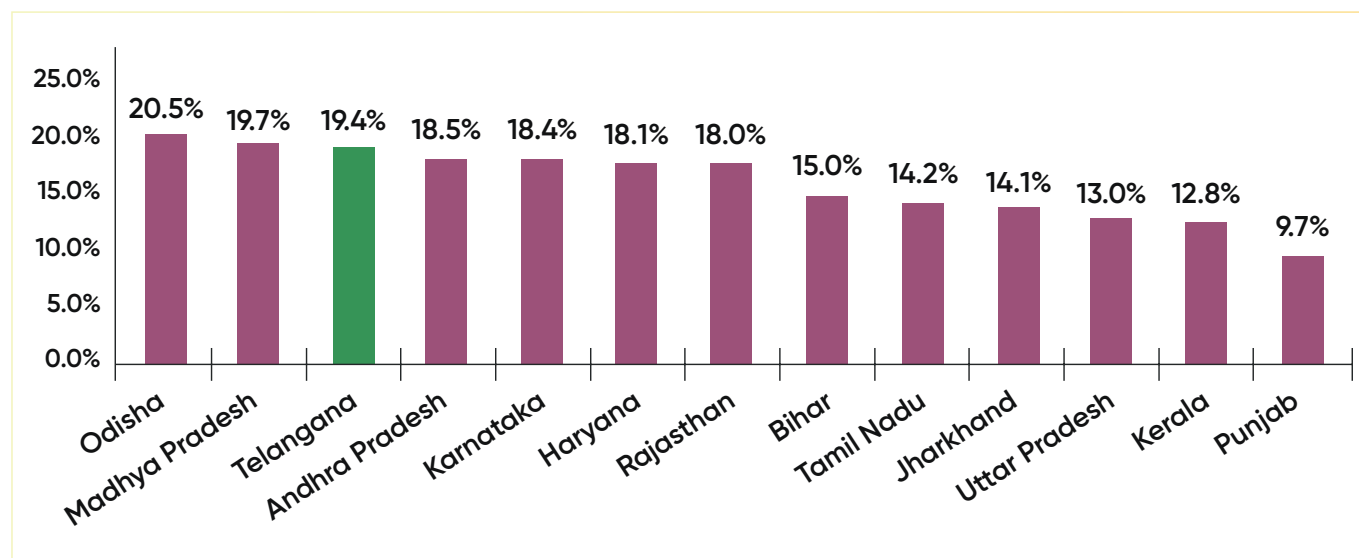
In 2022-23, the Per Capita Income (PCI) at current prices in Telangana was Rs.3.17 lakhs, which is Rs. 1.46 lakhs higher than the national per capita income in 2022-23 at Rs. 1.71 lakhs. Based on the Compound Annual Growth Rate (CAGR) of PCI at current prices for Telangana and India for 2014-15 to 2022-23, the average citizen in Telangana can expect his/her income to double in roughly 5 to 6 years, whereas the average citizens in the country as a whole would have to wait for about 8 to 9 years for their incomes to double. In the year 2021-22, Telangana's nominal PCI (Rs.2,75,443 as per Provisional Estimates) was the 2nd highest among the thirteen general states for which data had been released by MoSPI.

Per Capita Income at current prices (in Rs.) Telangana vs India (2014-15 to 2022-23)

Year	2014-15	2015-16	2016-17	2017-18	2018-19 (TRE)	2019-20 (SRE)	2020-21 (FRE)	2021-22 (PE)	2022-23 (PAE/FAE)	CAGR (2014-15 to 2022-23)	No. of years for doubling of PCI
Telangana	1,24,104	1,40,840	1,59,395	1,79,358	2,09,848	2,31,378	2,31,103	2,75,443	3,17,115	12.4%	5.8
All-India	86,647	94,797	1,03,870	1,15,224	1,25,946	1,32,115	1,26,855	1,50,007	1,70,620	8.8%	8.1
Multiplier	1.43	1.49	1.53	1.56	1.67	1.75	1.82	1.84	1.86		

In the year 2021-22, the state ranked third in terms of the growth rate of nominal GSDP (Provisional Estimates) among the thirteen General states for which data was released by the Ministry of Statistics & Programme Implementation (MoSPI)

GSDP (PE) Growth Rate at Current Prices for General States (2021-22)



Source: Ministry of Statistics and Programme Implementation (MoSPI), Government of India

TS-iPASS

<https://ipass.telangana.gov.in/>



Government of Telangana enacted the Telangana State Industrial Project Approval and Self-Certification System (TS-iPASS) Act, in 2014. (Act No.3 of 2014) The Act was legislated for issue of various clearances for setting up of industries at a single point based on the self-certificate provided by the entrepreneur and also to create investor friendly environment in the State of Telangana.

Salient Features of TS-iPASS

- Telangana is the only state in the country that has made it a right to get industrial clearances
- Approvals based on Self-certification by the applicant
- A Combined Application form is designed to cater to the requirements of all departments
- Number of required attachments reduced from 110 to 10, which are common for all departments
- All state approvals under the ambit of TS-iPASS. 27 Departments are providing 39 Pre-Establishment and Pre-Operation approvals under TS-iPASS
- Timelines notified for all clearances
- Clearances given within the set time limit varying from 7 days to a maximum of 30 days, depending upon the complexity of the approval, failing which the approval is said to be deemed
- For Mega projects, i.e. Projects with investment more than Rs.200 Crs., provisional clearances issued within 15 days, based on self-certificates furnished by applicants. Formal approvals/ clearances issued before the unit commences its operations
- Creation of "Industry Chasing Cell" in the office of Chief Minister headed by a Principal Secretary to monitor the implementation of major projects and oversee inter-departmental coordination
- All clearances under TS-iPASS provided through a user friendly End-to-End online System where an investor is guided in each step. He can upload the required documents, make online payment, track status of approvals, view and download the issued approvals
- E-mails and SMS alerts at all stages of the application process
- Model documents to be attached are provided on the Web portal
- Applicant can pay the scrutiny/ processing/ approval/ licensing fee for all departments through a single payment gateway
- Clearances are issued online which can be downloaded by applicant and verified by any third party
- The applicant is entitled to know the reasons for delay in getting the clearance within time limits
- Effective Grievance Redressal Mechanism
- The Act envisages provision for imposing penalties on the officers who fail to accord clearance within time limits @ Rs.1,000 per day
- TS-iPASS obviates the need to meet any official and gives all approvals in a time bound manner. Thus, it is a graft free industrial approval process

Implementation stages of approved projects

S.No	Progress	No. of units	Investment (Rs. in Crs.)	Total Employment
1	Commenced Operations	18,423	1,54,966.30	10,99,398
2	Advanced Stage / Initial Stage / Yet to start construction	4,322	1,05,093.80	6,55,259
	Total	22,745	2,60,060.10	17,54,657
	Total 2022-2023	3,191	26,791.42	1,02,099

EoDB & Invest Telangana



<https://invest.telangana.gov.in/ease-of-doing-business/>
<https://invest.telangana.gov.in/>

Ease of Doing Business (EoDB)

The Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce & Industry, Government of India, has taken up a series of measures to improve Ease of Doing Business. The emphasis has been on simplification and rationalization of the existing rules and introduction of Information Technology to make governance more efficient and effective. DPIIT, every year, is communicating a set of reforms to all states and is ranking the states based on level of compliance of these reforms by the states. Since 2016, Telangana stood among the top-ranking states in the country.

The reforms were implemented in the areas including Labour Regulation-Enablers, Access to Information and Transparency Enablers, Commercial Dispute Resolution Enablers, Land administration and Transfer of Land and Property, Land Availability and Allotment,

Inspection Enablers, Construction Permit Enablers, Single Window System, Environmental Registration Enablers, Obtaining Electricity Connection, Paying Taxes, Sector Specific and others.

EoDB-2022

For the year 2022, DPIIT has introduced Business Reform Action Plan (BRAP) with 352 reform points. During this assessment year, citizen services are introduced with the aim of achieving "Ease of Living". As part of this, several citizen services such as birth, death, income, caste, domicile, marriage registration are entirely digitized. The State has successfully implemented all the reforms. Currently, it is under evaluation by DPIIT.

Under Minimizing Regulatory Compliance Burden (MRCB) exercise, to further simplify business approvals processes, nearly 1278 compliance burden provisions have been simplified or eliminated.

Invest Telangana

Since its formation, Telangana has attracted over USD 50 Billion in investments since 2014 in IT & Industries. The Invest Telangana Cell was formed with the sole purpose of leading the State in becoming one of the top destinations for investments not only in India but globally.

The Invest Telangana Portal, launched in 2019, has been a one-stop destination for all the investors' needs in Telangana. Highlighting the 18 focus sectors along with each sector's policy support, Telangana's strength in the sector, and the contact details for each wing, the Invest Telangana portal has facilitated many of the marquee investments that have come to the state.

Focus Sectors under Invest Telangana



EoDB & Invest Telangana

UK and WEF '22 – Davos Visit

A delegation led by the Hon'ble ITE&C and Industries Minister visited the UK and the WEF Annual Meeting in May 2022 spanning 10 days. This visit saw the Hon'ble Minister and his team attend 45 business meetings, 4 roundtable meetings, 4 panel discussions while attracting investments worth over Rs. 4,200 Crores.



WEF '23, Davos

During the recent World Economic Forum at Davos in January 2023, Telangana delegation bagged Rs. 21,000 Crs. of investments. The Telangana team conducted 52 Business meetings, 6 roundtable meetings and 2 panel discussions over four days of the event.

Savills Report Launch

UK Headquartered real estate services giant, Savills released the report 'Hyderabad: The Sprint', stating that Hyderabad is surging ahead as the economic powerhouse of India.



Launch of TIA

The Telangana Investment Advisor (TIA) was launched by the Hon'ble minister Industries, IT, MAUD Mr. K. T. Rama Rao & Principal Secretary Dr. Jayesh Ranjan - IT & Industries. The Telangana Investment Advisor symbolizes the Telangana state bird Paala pitta (Indian roller bird) which is believed to bring good luck when seen, TIA will be the virtual face of Invest Telangana. The chatbot will assist investors by guiding them with information required and will facilitate them to explore any specific sector to Invest in Telangana. Further, the investor can reach out to sector specific director and discuss their investment plans.

Telangana State Industrial Infrastructure Corporation (TSIIC)

<https://tsiic.telangana.gov.in/>

Telangana State Industrial Infrastructure Corporation Ltd (TSIIC) is the Nodal Agency for the creation of Industrial Infrastructure by way of the development of Industrial Parks across the Telangana State.

The Core Functions of TSIIC

- Identification and acquisition of potential sites for the Development of Industrial Clusters
- Providing State of Art Infrastructure facilities in Industrial Parks/IT Parks/Biotech Parks/ Textile & Apparel Parks/SEZs with its own engineering division
- Allotment of land/plots/sheds for various industries
- Identification and development of infrastructure projects under PPP mode

Land Allotment

So far TSIIC has developed 109 New Industrial Parks on an extent of 35,581 acres in the State and allotted land to about 3680 industries on an extent of 7806 acres with an expected investment of Rs. 63,125 Crs. and employment potential of nearly 263222 persons during the F.Y.2014-23.

TSIIC has developed 19 New Industrial Parks on an extent of 8560 acres in the State and allotted land to about 2515 industries on an extent of 956 acres with an expected investment of Rs. 7256 Crs. and employment potential of nearly 52562 persons during the F.Y.2022-23

- TSIIC has allotted land to 586 ST & ST entrepreneurs to an extent of 295 acres during F.Y.2014-23. These ST & ST entrepreneurs were given a land rebate of Rs. 45.95 Cr.
- TSIIC has allotted land to 56 ST & ST entrepreneurs to an extent of 48 acres during F.Y.2022-23. These ST & ST entrepreneurs were given a land rebate of Rs. 8.95 Cr.
- The rebate on land rates for SC & ST Entrepreneurs is increased from Rs.10 lakhs to Rs.30 lakhs, upfront payment of only 25% with a moratorium of 2 years and payment of balance amount in 8 years. The interest rate is also reduced from 16% pa to 4%
- TSIIC has initiated / developed around 19 Industrial Parks during 2022-23 and about 70 new Industrial Parks are in the pipeline

Support to MSMEs

Government of Telangana has been implementing various initiatives for promoting the entrepreneurial spirit, growth and sustainability of MSMEs.

- Developed largest MSME Cluster at Dandumalkapur in over 500 acres
- Over 20 MSME Parks and Flatted Factory Complexes are being developed so far
- Atleast one new MSME Park in each district and Plug & Play Facilities / Flatted Factory Complexes across the State will be developed in the next 2 years for MSMEs to ensure and consolidate distributed industrial growth and help industrialization of rural & backward areas
- Plug & Play Facility of 1 lakh Sft to encourage Innovation at the grass root level among rural entrepreneurs, SHGs, handicrafts and handloom artisans. Integration with "Dalit Bandhu Scheme" with an objective to boost the local economy and generate employment for local people



French Delegation to TSIIC



HSIIDC Officials' Visit

Telangana State Industrial Infrastructure Corporation (TSIIC)

Mega Projects

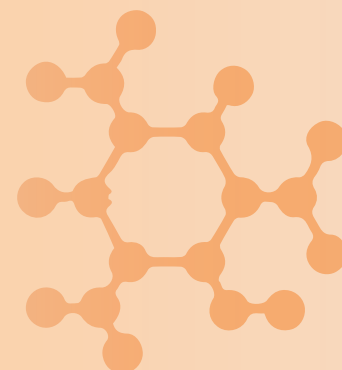
Following are the Mega Projects initiated during 2022 – 23 by TSIIC

S.No.	Name of the Megaproject	Location	Investment (Rs. in Lakhs)	Employment
1	Drillmec International Private Limited	IP Seetharampur	1,40,000	3000
2	Chandenvally Infra Park Limited	IP Chandanvelly	7,91,900	1200
3	M/S. Microsoft Corporation (India) Private Limited	IP Chandanvelly	2,61,711	147
4	Kitex Apparel Parks Ltd	IP Seetharampur	1,40,000	11233
5	Kitex Apparel Parks Ltd	Kakatiya Mega Textile Park	1,20,000	11095
6	Hindustan Coca Cola Beverages Pvt Ltd	Food Proc Park Bandathimmapur	1,20,000	150
7	M/S. Radiant Appliances & Electronics Pvt Ltd	EHMC Non-SEZ area	1,00,060	4400
8	M/S. CtrlS Datacenters Limited	IP Chandanvelly	92,016	495
9	Vem Technologies Pvt Ltd	NIMZ-Ph-1	78,598	1050
10	Premier Energies International Pvt Limited	Non SEZ E-City	71,800	259
11	Indian Immunologicals Limited	IP BT Park Ph 3 Karkapatla	66,993	376
12	Nextra Data Limited	IP Chandanvelly	56,700	500
13	Ashirvad Pipes Pvt. Ltd	IP Chandanvelly	49,885	520
14	M/S Azad Engineering Pvt Limited	Mangampet	42,293	721
15	Bharat Petroleum Corporation Limited	UDL Dandu Malkapur (Sy.no617-1)	41,600	235
16	KRIBHCO Green Energy Private Limited	UDL Stambampalli KRIBHCO	35,085	200
17	KRIBHCO Green Energy Private Limited	UDL Stambampalli KRIBHCO	35,085	200
18	Azad Engineering Pvt Ltd	IP Thunkibollaram	32,800	948
19	TIF Integrated Industrial Parks Private Limited	UDL Malkapur1	30,853	2560
20	Ciro Pharma Pvt Ltd	IP BT Park Ph 3 Karkapatla	30,500	540
21	Malabar Gems And Jewellery Manufacturing Pvt Ltd	General Park Maheshwaram	27,473	1782

Telangana State Industrial Infrastructure Corporation (TSIIC)

22	GM Modular Private Limited	IP Chandanvelly	26,289	1132
23	Dandu Biosciences Private Limited	IP BT Park Ph-3 Karkapatla	25,000	120
24	Premier Energies Global Environment Pvt Ltd	Non SEZ E-City	24,606	650
25	M/S. Masqati Dairy Products Limited	TSFPZ wargal At Mulugu	24,249	1050
26	Vivek Bio-Products Private Limited	TSFPZ Lingampally	20,760	200
27	Avishkaran Industries Pvt Ltd	EHMC Non-SEZ area	20,459	1000
28	M/S Resojet Pvt Ltd	Non SEZ E-City	18,600	2200
29	Manikanta Concerns	TSFPZ Vangara	18,476	213
30	M/S. Avisa Foods Private Limited	Mega Food Park, Buggapadu	17,612	2406
31	M/S. Mankind Consumer Healthcare Private Limited	TSFPZ Wargal At Mulugu	17,273	200
32	Gangula Hariharan Sai Rice Millers	TSFPZ Wargal	17,000	243
33	Manchukonda Prakasham Foods & Spices	UDL Rangaipally	16,462	700
34	Apollo Micro Systems Ltd	TSIIC Hardware Park Ph-2	15,000	350
35	Astral Limited	IP Chandanvelly	14,734	500
36	3F Industries Limited	Food Proc Park -Bandathimmapur	14,700	246
37	Dhatri Bio Solutions Private Limited	UDL Veliminedu	13,402	395
38	M/S. SCL Electronics India Pvt Ltd	EHMC Non-SEZ area	12,670	502
39	Nicomac Taikisha Clean Rooms Private Limited	IP Chandanvelly	12,622	810
40	Bharat Serums And Vaccines Ltd.	IP Btpark Ph-2, Karkapatla	12,336	137
41	Trefoil Packaging Pvt Ltd	IP Chandanvelly	12,000	118
42	Monarch Ergo Private Limited	UDL Bandamailaram 127	11,472	620
43	Biliti Electric India Private Limited	IP Yelumala	11,250	510
44	Standard Glass Lining Technology Private Limited	UDL-Jinnaram-New	11,073	300
45	Nile Li-Cycle Private Limited	EMC Maheshwaram	10,101	75
46	Lazuline Biotech Pvt Ltd	IP Btpark Ph-3, Karkapatla	10,000	93

Pharma and Life Sciences



<https://invest.telangana.gov.in/pharma/>

Telangana has emerged as a leading life sciences hub in Asia housing more than 1000 life sciences companies with a combined valued of USD 80 Bn. The vision is "To become the leading Life Sciences hub in Asia through innovation-driven and tech enabled growth, while increasing the sectoral value to USD 250 Billion by 2030." Hyderabad is the only city in the country that has an ever-growing Genome Valley, an expanding Medtech Park and an upcoming Pharma City, which will be the world's largest.

Key Highlights

In last two years, the life sciences sector in Telangana has grown at the rate of 23 percent while the national average has been around 14 percent.

Summary of Investments in Life Sciences sector in FY 22-23

Number of Investment proposal in Life Sciences sector	240
Investment	INR 35999 Crs.
Proposed employment generation	17,247

Source: TS-IPASS

Key Investments

Companies like Bristol Myer Squibb, Sanofi, Roche, Novartis (Sandoz) have announced their investment plans in Hyderabad. With these, 4 of the top 10 global innovator companies now have a direct presence in Hyderabad through their dedicated centers. Following are the key announcements:

Bristol Myers Squibb

Bristol Myers Squibb announced setting up of a state-of-the-art facility in Hyderabad with an investment of USD 100 Mn. The proposed facility in Telangana will employ about 1,500 local youth.



Roche

Roche, one of world's largest and global pioneer in pharma & diagnostics announced setting up of its Global Analytics and Technology Center of Excellence (GATE) in Hyderabad.

Sanofi

Global healthcare giant Sanofi announced to establish its Global Medical Hub in Hyderabad to support growth ambitions and build workforce for future. Currently, the hub plans 350-strong workforce, which it will significantly expand later.



Pharma and Life Sciences

Sandoz

Sandoz announced setting up of their GCC in Hyderabad. The GCC will provide support for their worldwide knowledge services.



Thermo Fisher Scientific

Hon'ble Minister Mr. K. T. Rama Rao inaugurated ThermoFisher Scientific's India Engineering Center (IEC) in Hyderabad. The Thermo Fisher's IEC at Hyderabad is a 42,000 sq. ft facility that includes an engineering lab and will support new product development for laboratory and analytical solutions for Thermo Fisher's global sites.

Center for the Fourth Industrial Revolution- C4IR Telangana

World Economic Forum has announced to set up a Centre for the Fourth Industrial Revolution (C4IR Telangana), India's first centre thematically focused on healthcare and life sciences, in Hyderabad. Government of Telangana and World Economic Forum signed an MoU to this effect at Davos.



BioAsia 2023

The 20th edition of BioAsia 2023 was held at HICC Hyderabad from February 24-26th. The three-day annual global forum organized by the Government of Telangana, was inaugurated by Mr. K. T. Rama Rao, Hon'ble Minister for Industries and Commerce, Government of Telangana, with the theme of 'Advancing For One', focused on Shaping the next generation of humanized healthcare. The event brought together experience and expertise of global life sciences industry, eminent scientists, researchers, science parks, Government & Regulatory Authorities, Venture Capitalists and Investors, incubation centers, technology licensing professionals, policy makers, academia, medical practitioners, students and industry leaders from across the life science landscape. With participation from 2015 registered delegates and over 500 exhibition visitors from 50 countries, the event witnessed many strategic and investment announcements like Bistol Myers Squibb

(BMS), Corning Technologies etc. aimed to boost the growth of life sciences industry in the state. Few closed-door Roundtables were also hosted on the sidelines of BioAsia namely, Telangana-Flanders Task Force roundtable, BioAsia- Medtech CEO roundtable, Telangana-UK roundtable.

This year's BioAsia International Trade Exhibition saw a massive participation wherein over 175 companies exhibited their innovations and developments from the fields of med-tech, pharma, biotech, life sciences and health-tech. The exhibition also consisted of an innovation zone comprising of the 76 shortlisted startups in the Startup Stage Pavilion and 10 incubators in Incubator Pavilion, additionally 25 companies exhibited in the MSME pavilion in partnership with the Ministry of Micro, Small & Medium Enterprises, Government of India, and 11 companies exhibited in the Med-tech pavilion in partnership with the Department of Pharmaceuticals, Government of India. Top five start-up companies were selected and handed over startup

Pharma and Life Sciences

awards, including Rs. 50,000 cash awards sponsored by BIRAC and \$22,000 amazon web services credits.

Investment announcements as part of BioAsia 2023

- Jubilant Bhartia Group, a global leader in Pharma & Life Science announced to establish a state-of-the-art facility for its Jubilant Biosys Ltd. in Genome Valley
- Corning Incorporated, a fortune 500 company and SGD Pharma's are investing Rs. 500 Crs. to set-up a world-class manufacturing facility of packaging glass production for pharmaceuticals. The project will create more than 550 jobs & advance manufacturing capabilities in India, accelerating the delivery of critical drugs
- US headquartered Foxx Life Sciences plans to invest Rs. 200 crore in Telangana to expand its capabilities in pharmaceutical single-use technology for drug manufacturing. The company opened their first international plant a few years ago in Telangana & successfully established a warehouse & a white room for laboratory products
- The UK-based Surface Measurement Systems (SMS) opened its Particle Characterisation Laboratory in Hyderabad. The only such lab in India, it is spread across 7,000 sqm and the facility will be a state-of-the-art laboratory with focus on pharmaceutical powder characterisation
- Eagle Genomics, a pioneering tech bio platform company headquartered in UK, has announced that it is expanding its capabilities rapidly in Hyderabad

Biopharma Hub

Hon'ble Minister Mr. K. T. Rama Rao laid the foundation stone for Biopharma Hub (B-Hub), a first-of-its-kind Growth-Phase Centre and Biopharma Scale-up manufacturing facility, in Genome Valley. B-Hub is a unique initiative by Government of Telangana and Department of Biotechnology to support small and medium sized biopharma companies in conducting proof-of-concept studies in its 200L Single Use scale-up.



Life Sciences University

The Govt of Telangana has entered into MoU with King's College London during the visit of state delegation to London. The MoU sets out a joint intention between King's College London and Government of Telangana to explore development of higher educational provision in Life Sciences University within the Hyderabad Pharma City.

Flow Chemistry Technology Hub

Country's first multi-stakeholder hub on Flow Chemistry Technology (FCT) Hub was inaugurated by Dr. Jayesh Ranjan. FCT Hub houses state-of-the-art flow chemistry equipment to provide hands-on training and promote scientific capability building to ensure greater incorporation of flow chemistry techniques during pharma R&D and greater adoption of continuous synthesis for manufacturing of APIs.



Pharma and Life Sciences

Announcements

Bharat Serums and Vaccines

Bharat Serums and Vaccines announced setting up of state-of-the-art injectable & vaccine manufacturing facility in Genome Valley with an investment of Rs. 210 Crs.



Ferring Pharmaceuticals

Hon'ble Minister Mr. K. T. Rama Rao inaugurated the Ferring Laboratory plant at Genome Valley in Hyderabad. The facility has been established with an investment of about 30 Million Euros.

Biological E

Biological E announced their expansion plans for investment of more than Rs. 1800 Crs. & employment creation of over 2500 people in their 3 facilities in Genome Valley, Hyderabad. This expansion makes Hyderabad the only region in the world to produce 14 billion doses of vaccines.



DFE Pharma

Hon'ble Minister Mr. K. T. Rama Rao inaugurated DFE Pharma's new Center of Excellence in Hyderabad. The new 'Closer to the Formulator' (C2F) center, based in Genome Valley, offers DFE Pharma's excipient expertise to help pharmaceutical companies achieve 'first-time right' formulations.

Indian Immunologicals

Indian Immunologicals Limited (IIL) announced that the company will invest about Rs. 700 Crs. to set up a new animal vaccine manufacturing facility in Genome Valley, Hyderabad.



Pharma and Life Sciences

Inauguration of Labspace in Genome Valley

Hon'ble Minister Mr. K. T. Rama Rao launched the development of 9 lakh square feet of Life Sciences labspace Infrastructure in Genome Valley by Rx-Propellant. The new additions to Telangana's life sciences ecosystem will bring an investment of Rs. 1,100 Crs. and about 3,000 jobs.



GV Research Platform

Hon'ble Minister Mr. K. T. Rama Rao inaugurated GV Research Platform's state-of-the-art facility that offers a suite of preclinical research services. The 28,000 sq ft facility will have opportunities for Veterinary Science, Toxicology, Pharmacology and Analytical Research professionals.

Vimta Labs

Hon'ble Minister Mr. K. T. Rama Rao inaugurated Vimta Labs' state-of-the-art EMI/EMC Lab at Neovantage Park (MN Park) in Genome Valley. It will handle advanced and complex testing to support ESDM requirements of Active Medical Devices, Wireless, Defense, other electronic Industrial sectors.



Gland Pharma

Gland Pharma announced their plans to expand footprint in Genome Valley by investing Rs. 400 Crs. and creating 500 more jobs for advanced areas such as biologicals.

Sahajanand Medical Technologies

Hon'ble Minister Mr. K. T. Rama Rao inaugurated the Sahajanand Medical Technologies, a global hub for manufacturing and R&D facility in Medical Devices Park, Sangareddy.



Pharma and Life Sciences

Surface Measurement Systems

UK-headquartered Surface Measurement Systems announced the establishment of Particle Characterization Laboratory in Hyderabad.



Glaxosmithkline (GSK)

The state delegation to UK led by Hon'ble Minister met with Mr. Franck Riot, Global R&D Head, GSK Consumer Health to discuss the growth witnessed by their safety & regulatory set up in Telangana and their expansion plans for the state as they become Haleon in mid-2022.

Panel Discussion on Telangana Life Sciences

Hon'ble Minister participated in a panel discussion on 'Telangana Lifesciences Industry's Vision For 2030' organized by MoneyControl at Davos '22. The other panelists included Co-Chairman & MD of Dr. Reddy's Laboratories Mr. GV Prasad and India Partner of PwC Mr. Mohammad Athar.



Chemo

Spanish Multinational Chemo announced the expansion plans to invest about Rs. 100 Crore in their Hyderabad site expansion over next two years.

Novartis

Hon'ble Minister Mr. K. T. Rama Rao met with Mr. Vas Narasimhan, CEO, Novartis to discuss on the growth of Novartis from Hyderabad. Hyderabad has now become their largest Center outside their HQ at Basel with about 9000 people and also a Center of innovation.



Pharma and Life Sciences

Roche

Hon'ble Minister Mr. K. T. Rama Rao met with Dr. Chirstoph Franz to discuss the expansion plans of Roche for Hyderabad.



Ferring Pharma

Switzerland headquartered Ferring Pharma announced that it will be expanding in Hyderabad with an investment of Rs. 500 Crs. for setting up of another formulation unit.

Serum Institute of India

Mr. Adar Poonawala, CEO of the World's leading vaccine company, Serum Institute of India met with Hon'ble Minister Mr. K. T. Rama Rao to discuss the opportunities related to vaccine R&D and manufacturing in Telangana.



Jubilant Group

Hon'ble Minister Mr. K. T. Rama Rao met with Jubilant Group's Chairman Mr. Shyam S Bhartia, and Managing Director, Mr. Hari S Bhartia to discuss the investment opportunities in Hyderabad.

EMPE Diagnostics

Sweden headquartered EMPE Diagnostics announced the setting up of their global production facility for Tuberculosis diagnostic kits at Genome Valley in Hyderabad with capacity to produce 2 million kits per month.



Pharma and Life Sciences

GMM Pfaudler

GMM Pfaudler announced its expansion plans of their glass-line equipment manufacturing facility in Hyderabad with an investment of USD 10 Million. GMM Pfaudler is a global leader in corrosion-resistant technologies, systems, and services for the chemical, pharma, food and energy industry.



DFE Pharma

DFE Pharma, a global leader in pharma announced setting up of its new Centre of Excellence "Closer to the Formulator" (C2F) in Genome Valley, Hyderabad.

Biotech (R)evolution

Hon'ble Minister Mr. K. T. Rama Rao participated in an exclusive discussion as part of the Biotech (R)evolution panel at World Economic Forum, Davos. The Minister shared his thoughts on the landscape of potential for biotech revolution in the fields of medicine, food, and materials.



Roundtable by Foreign Policy and AstraZeneca

Hon'ble Minister Mr. K. T. Rama Rao participated in an exclusive roundtable on "Early Actions & Sustainable Finance to prevent Non-Communicable Diseases (NCDs) organized by Foreign Policy in partnership with AstraZeneca.

Eurofins

Eurofins, a global leader in Pharma & Bioanalytical Testing, has announced establishment of a fully-equipped, state-of-the-art laboratory campus in Genome Valley, Hyderabad.



Pharma and Life Sciences

WebPT

WebPT announced Global Capabilities Centre (GCC) in Hyderabad with Rs. 150 Crore investment. WebPT is one of the fastest-growing outpatient rehab therapy software platforms in the world.



DifGen Pharmaceuticals

DifGen Pharmaceuticals Inc., USA opened their Centre of Excellence with 27,000 SFT of R&D lab in Hyderabad.

Serum Institute of India

Serum Institute of India announced establishment of Dr. Cyrus Poonawalla Center of Excellence in Infectious Diseases and Pandemic Preparedness in Hyderabad.



Hon'ble Minister Mr. K. T. Rama Rao inaugurated Yapan Bio's Process Development Facility



Dr. Jayesh Ranjan inaugurated WebPT's tech centre in Hyderabad



Providence

Providence, a US-based healthcare systems provider, which inaugurated its global innovation centre in Hyderabad in 2020 announced that it plans to grow 3X in the Hyderabad centre. The Providence Hyderabad GIC, which has grown to 1000 employees since 2020, is now expected to grow to over 3,500 people over the next couple of years.

Investments in Food Processing Sector over the last 9 years

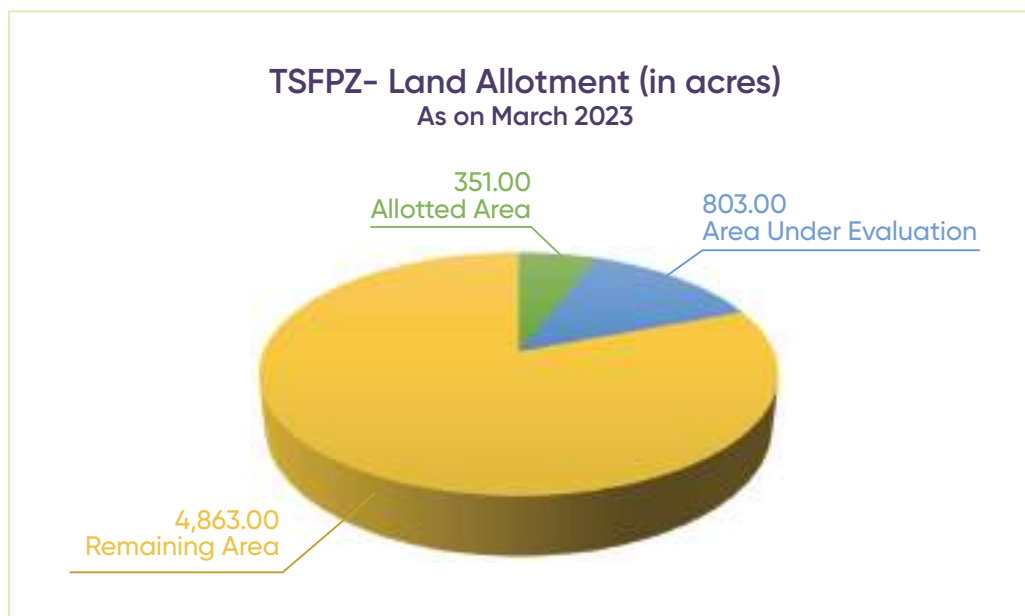
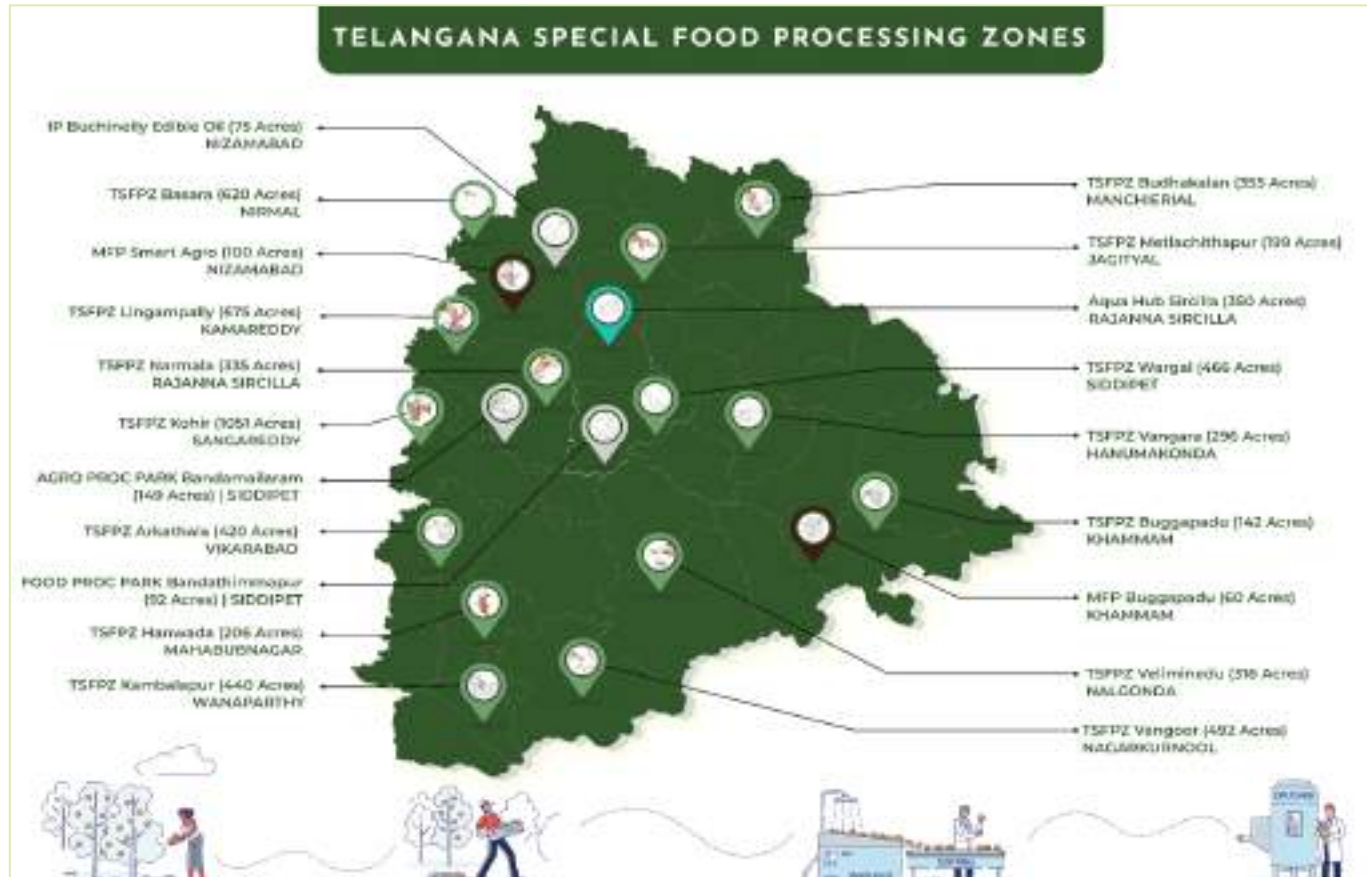
- Further, the sector is poised to grow at a much faster rate in the next few years. Additional investments worth Rs. 15,206 Crs. are at various stages of implementation and are likely to complete grounding by 2024



Food Processing

Special Food Processing Zones

The Government of Telangana is creating Special Food Processing Zones (SFPZ) across the state to support the development of large food processing clusters. Currently, the state has 14 Special Food Processing Zones aiming to cover over 10,000 acres.



As on March 2023, the total allottable area under TSPFZ was 6017 acres, out of which 351 acres had been allotted to 77 food processing companies. Applications for 803 acres are currently under evaluation. Balance 4,863 acres are available for allotment in these SFPZs.

Food Processing

S.No.	Place	Total Area (Acres)	Allotted Area (Acres)	Area to be allotted to EOI applicants (Acres)	Available area for Allotments (Acres)
1	Lingampally	675	20	32	623
2	Narmala	335	55	18	262
3	Bhuddakalan	355	6	42	307
4	Vangoor	493	4	95	394
5	Wargal	466	169	97	200
6	Buggapadu	143	3	85	55
7	Basara	620	0	24	596
8	Veliminedu	316	40	95	182
9	Arkathala	420	14	102	304
10	Metlachittapur	199	0	19	180
11	Vangara	296	41	88	168
12	Hanwada	206	0	0	206
13	Kambalapur	440	0	0	440
14	Kohir	1,051	0	106	945
	Total	6,017	351	803	4,863

Micro Food Processing Enterprises

Government of Telangana focusses on creation of micro food processing enterprises across the state empowering the small and micro entrepreneurs through end-to-end handholding support. Starting from identification of the business idea to preparation of the detailed project report, to securing collateral-free bank loans, to facilitation of installation and thereafter provision of marketing linkages to the enterprise, a dedicated inter-department team is helping to create thousands of micro food processing enterprises. The effort draws subsidy support from Pradhan Mantri Formalization of Micro Enterprises Scheme (PMFME), which is funded 60% by the centre and 40% by the state government and has been effective from 2020-21.

Progress till March 2023

- A Seed Capital amount of Rs. 36.83 Crs. has been disbursed to 9,373 SHG members through SERP and MEPMA
- 4,957 seed capital beneficiaries and scheme applicants have been trained for entrepreneurship development and technical skills under the capacity building component in 2022-23
- 3 Common Incubation Centers (CICs) with a budget of Rs. 8.43 Crs. with 100% funding from the scheme are under construction. The proposed common incubation facilities are for Millets in Hyderabad, Spice Processing in Warangal (rural) and Rice and Mango Processing in Jagtial District
- As on 10th May 2023, a total of 2,531 applications were received, loans sanctioned and the units are in the process of being grounded



Food Processing

Plug and Play Supply Chain Initiatives

Govt of Telangana facilitates backward linkages for food processing industries in collaboration with SERP, MEPMA, Tribal welfare department, Social welfare department, Agriculture & Horticulture department, Animal Husbandry, Dairy and Fisheries department.

Backward linkages for purchase of Rs. 447 Crs. worth of raw material by various food processing companies such as Plant Lipids, Godrej, Mars, Scoops, Suguna Foods, Hesa, Fruitful has been facilitated as of March 2023.



Be'nishan, a farmer producer company established by Government of Telangana to bridge the gap between industry and farmers.



Aerospace and Defence

<https://invest.telangana.gov.in/aerospace-and-defence/>



Aerospace and Defence sector in Telangana had a spectacular year, reaping global acclaim and applause for sector performance, repeat investments and further mega investments were committed during the year. Telangana won the Best State Award from Ministry of Civil Aviation consecutively for the third time in a row (2018, 2020, 2022), for being the Indian State with the most forward outlook towards Aerospace & Aviation sector and as one of the most cost-effective global aerospace hubs.

The key highlight of the year was the announcement of Safran Engine MRO project with 1500 Crs. investment creating employment for 1000 people. This will be the first Engine MRO by any OEM in India and the largest MRO in Safran MRO network globally. Safran inaugurated two factories this year in Hyderabad - The Safran Electricals and Power factory which is into manufacturing of wire harnesses and the Safran Aircrafts Engine factory manufacturing Aero Engine parts for CFM engines. Safran also announced an 800-seater IT division in Hyderabad. The repeat investments from the French major in close succession stands testimony to the progressive policies of the State Government and the vibrancy of the Aerospace ecosystem in Hyderabad.

The State Government actively participated in DEFEXPO 2022, held in Gujarat and Aero India 2023 in Bangalore. The State also participated in Farnborough Airshow, UK, on the request of the UK Government, and had several fruitful meetings in all three major industry expos.

Major highlights

- Airbus announces manufacturing of cargo and bulk cargo doors in Hyderabad for its A320 neo aircraft family in TASL Hyderabad
- Boeing announces India's first passenger to freighter conversion line for Boeing at GMR Aerotechnic, MRO, Hyderabad
- Delivery of the first Made in Telangana Apache Helicopter fuselage to Indian Army by Tata Boeing Aerostructures Limited
- Launch of Amazon Air - Amazon's dedicated freighter services in Hyderabad, first time outside of US and Europe

- Groundbreaking of exclusive manufacturing facility for Mitsubishi heavy engineering at Azad Engineering Aerospace complex
- Groundbreaking ceremony of Integrated Missile complex by VEM Technologies at Zaheerabad
- Ground-breaking ceremony of aerospace facility of SKM Technologies at Adibatla

Major Industry Events

- DEFEXPO 22 hosted by Ministry of Defence at Gandhinagar, Gujarat
- Aero India 2023 hosted by Ministry of Defence at Yelahanka Bangalore
- Farnborough Airshow 2022, UK
- CII Defence Conclave in Nov '22
- National Conference on "Evolving Ecosystem in Aerospace: Challenges and Opportunities" organised by Aeronautical Society of India (AeSI) in Nov '22
- SIDM seminar on Stimulating Indian Defence Exports in Oct '22
- Economic Times Digital Conclave '22 - Digital transformation of Defence Sector

Visits from Overseas Delegations

During the year, a large delegation of US Aviation and Aerospace industries visited Hyderabad to explore partnerships and cross border business opportunities in Telangana ecosystem.

A large French delegation led by MEDEF and IFCCI also visited Telangana to explore synergies between industries of both regions, Aerospace being a key theme of interest.

Overall Telangana had an excellent year for Aerospace Sector thanks to the exemplary leadership of Hon'ble Minister Shri K T Ramarao and Principal Secretary Dr. Jayesh Ranjan IAS. The spectacular growth of the aerospace industry in the State fuelled by the progressive policies and world class ecosystem provided by the State government has been highlighted in several National and international forums during the year.

Aerospace and Defence



Inauguration of Safran Aircraft Engine and Safran Electrical and power factories in Hyderabad



Aero India 2023 meetings



Delivery of 1st Apache Helicopter Fuselage made in Tata Boeing Aerostructures Limited, Hyderabad to the Indian Army



Aerospace and Defence



Groundbreaking of exclusive manufacturing facility for Mitsubishi Heavy Engineering by Azad Engineering in Telangana



Launch of Amazon Air – Amazon's dedicated Air Cargo fleet, first time outside of US and Europe in Hyderabad



High level delegation of Boeing led by Sir Michael Arthur, the outgoing President Boeing International and Dr Brenden Nelson, Incoming President Boeing International met with Hon'ble Minister Mr. K. T. Rama Rao to discuss future expansion of Boeing operations from Hyderabad



CII Defence Conclave 2022



National conference on Evolving Aerospace ecosystem in India organised by Aeronautical Society of India

Aerospace and Defence



DEFEXPO SIDM seminar on Stimulating Indian Defence Exports



DEFEXPO 2022- Meeting with HAL Chairman



DEFEXPO 2022- Meeting with BAE Systems



DEFEXPO 2022 Meeting with L3 Harris



French delegation led by MEDEF to Hyderabad



Economic times Digitech Conclave 2022: Digital transformation in Defence sector

Aerospace and Defence



DEFEXPO 2022- Meeting with ECIL leadership



DEFEXPO 2022- Meeting with PTC CMD Mr Sachin Agarwal



Visit of US Aviation and Aerospace industry delegation to Hyderabad



Structural integrity Congress 2022 organized by Department of Mechanical and Aerospace Engineering, IIT Hyderabad



Meeting with Karen Holdford, Vice Chancellor of Cranfield University Prof Simon Pollard, Prof Vice Chancellor International, Prof Dame Helen Atkinson, Prof Vice Chancellor Aerospace Transport and Manufacturing at Cranfield University UK regarding ongoing engagement for offering Cranfield courses in Aerospace skilling in Hyderabad



State participation in Farnborough Airshow UK



Ground-breaking of VEM technologies Missile Integration complex in Zaheerabad

Automotive & EV



<https://invest.telangana.gov.in/automobiles/>

Telangana Mobility Valley (TMV)



Telangana Mobility Valley is India's first and one of its kind New Mobility focused cluster launched in February 2023 during the Hyderabad E-Mobility Week. TMV aims to attract investments of Rs. 50,000 Crs. and generate more than 4 lakh jobs in the next 5 years, to create best in class infrastructure and provide end-to-end ecosystem support to promote transition to sustainable mobility and make Telangana the most competitive destination for both manufacturing and e-R&D in India.

TMV will facilitate companies across all segments of sustainable mobility:

- Electric 2W/3W/4W
- Advanced Cell Chemistry and Hydrogen fuel cells
- Tier 1 and Tier 2 Component manufacturers
- Auto Engineering R&D companies

To achieve these objectives, the State government is developing 4 Mega clusters in and around Hyderabad as part of the TMV initiative. Each of the clusters will

be equipped with state-of-the-art infrastructure to reduce cost of operations for their tenant

- EV Manufacturing cluster in Zaheerabad
- EV Manufacturing cluster in Seetharampur
- Energy storage system (ESS) cluster in Divitipally
- Testing and Innovation cluster at Yenkaithala

India's most comprehensive shared testing and validation infrastructure will be set up at Yenkaithala. This will include

- State of the art labs for EV Powertrain, EV Battery, ADAS, NVH, EMI-EMC and Component Test Labs
- India's first CAV proving grounds to test Autonomous Vehicles in 100+ acres
- Telangana has signed a MoU with ATS-TUV Rheinland, a leading German services provider to develop and operate these facilities in Yenkaithala. The company will invest 250 Crs. to develop these facilities in Yenkaithala

Automotive & EV

MoUs Signed in FY 2022-23



Biliti Electric, a California based company, will invest over Rs. 1200 Crs. in Telangana to set up world's largest electric three-wheeler factory. The new plant will provide direct employment to about 3000 people and will have a capacity to produce 2,40,000 units annually.



Automobile leader Hyundai will invest Rs. 1,400 crore in the upcoming Telangana Mobility Valley. Hyundai will be setting up proving grounds (test tracks) and they will be a stakeholder and a consortium partner in the first of its kind New Mobility Valley created by the Telangana government.



Attero Recycling, an e-waste recycling and Li-ion battery recycling company, will invest Rs. 600 Crs. to set up a state-of-the-art integrated Lithium-ion battery recycling factory in Telangana. The facility will be spread over 50 acres and will increase Attero's Li-ion battery recycling capacity to 19,500 tonne by end of 2023 from its current capacity of 4500 tonne.



Allox Advance Materials will be setting up India's first-of-its-kind multi-GW lithium cathode material processing facility in Telangana. This involves an investment of Rs. 210 Crs., with an initial capacity of 3GWH per annum on a total investment outlay of Rs. 750 Crs., with a capacity of 10 GWH by 2030. The project will create an employment for 600 professionals.



Apollo Tyres will be setting up a Digital Innovation Centre in Hyderabad. This is the second Digital Innovation Centre for Apollo Tyres, which has its first such centre in London. This will use new age technologies like IoT, Cloud Computing, Artificial Intelligence, Machine Learning, Robotic Process Automation and BlockChain.

Automotive & EV

MoUs Signed in FY 2022-23



Automotive Test Systems and TUV Rheinland, will invest Rs. 220 Crs. to set up an automotive technology centre and proving ground at the Telangana Mobility Valley. This will be set up on 125 acres and will focus on current and emerging technologies like EV, CAV, hydrogen/fuel cells etc. Various test tracks to evaluate vehicle dynamics and ADAS features and laboratories for battery testing, cells, vehicle components, electric motors and e-axes will also be set up in phases.



Shell signed an MoU with TASK to develop Skilling Program for Electric Mobility Sector to upskill range of workforce including under-educated youth and women. This competent and future-ready workforce would be readily available for employment in the Telangana Mobility Valley and would accelerate transition to net zero emissions.



BOSCH



Bosch, BITS and Govt. of Telangana signed an MoU to establish a Center of Excellence for New Mobility. New Mobility refers to the emerging innovations and technologies in the automotive industry with key focus areas including but not limited to Electrical Vehicles, Autonomous Vehicles, Connected Vehicles, Automotive Cybersecurity and Networking.



Mahindra & Mahindra will be investing Rs. 1000 Crs. to establish manufacturing facility including development and production of electric 3 and 4 wheeler pertaining to last mile mobility business, as an expansion of existing manufacturing facility at Zaheerabad. Project will provide employment to about 1000 people.



Automotive & EV

Hyderabad E-Mobility Week 5-11 Feb 2023

Electric Vehicle Rally conducted in two routes in Hyderabad city on 5th Feb 2023. More than 600 vehicles joined the rally to spread awareness on zero emission targets and our role in achieving net carbon neutral mobility.



Mobility Next Hyderabad Summit conducted on 6th Feb 2023, saw participation of global and domestic speakers from Volvo, Stellantis, Skoda, Uber, Apollo Tyres, Bloomberg, BCG, Mahindra, Bosch, Amara Raja, Tata Motors, Greaves Cotton, HSBC, ZF and Switch Electric.

C.A.S.E. Mobility Grand Startup Challenge, supported by TVS, conducted by T-Hub and IIT Hyderabad TiHAN in the Connected, Autonomous, Shared and Electric domain saw applications from 100+ startups. Top 7 startups pitched their ideas on 7th Feb 2023.



Hyderabad e-Motor Show organized on 8-10 Feb 2023. Sleek vehicles like Pininfarina Battista, Citroen eC3, and electric models by BYD, MG, Hyundai and others were showcased.

Handlooms & Textiles

<http://handtex.telangana.gov.in/>



Handloom and Powerloom Sector

The Handloom and Textile industry is second only to agriculture in terms of workforce and employment potential. Hence Telangana has given special attention to this sector contributing significantly to exports as well as domestic consumption. Telangana State has a vibrant Handloom sector, with 6 geographical indication registrations (Gadwal sarees, Pochampalli Ikat, Siddipet Gollabhamma, Narayanpet Handloom Sarees, Puttapaka Telia Rumal, Warangal Durries). There are 21,750 active geo tagged handlooms in the State and about 50,000 persons are employed as weavers or ancillary workers in the sector.

The power loom sector in the state is mainly clustered in Sircilla, Karimnagar, Warangal & Nalgonda districts and there are 43,162 geo tagged power looms in the state. The Bathukamma saree scheme has given a major fillip to the low value grey cloth production in the power loom sector and enabled jacquard & dobby saree production, with a distinctive design & style, in addition to improving incomes and skills of the power loom workers and has led to the development of the industry as a whole.

In the last nine years, Handlooms & Textiles sector has attracted total investments of Rs. 6,496 Crs. with employment potential of 43,370 people. Of these, investment projects worth Rs. 2,931 have been commissioned with an employment potential of 8,110. The remaining have either been grounded or are currently under construction.

Nethannaku Cheyutha (Telangana Handloom Weavers Thrift Fund Saving & Security Scheme)



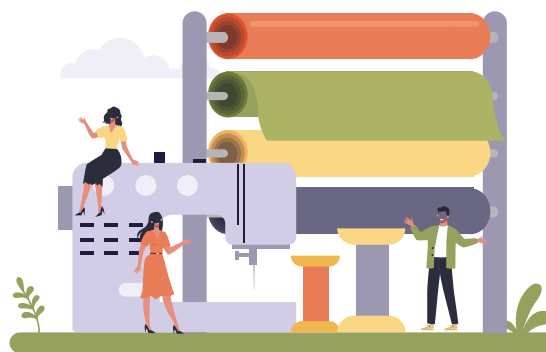
This saving scheme is for all weavers & ancillary workers irrespective of cooperative fold, wherein the individual contributes 8% of declared income into a Recurring Deposit (RD1) and the Government contributes 16% into a corresponding RD2 account with a lock in period of 36 months.

The scheme, which expired in 2021, has been extended by 3 years and the Government will spend Rs. 30.0 Crs. per annum on the same. So far 31,810 applications have been received and 29,788 RD1 and 26,673 RD2 accounts have been opened. An amount of Rs. 16.11 Crs. has been released to the AD's (H&T) for opening of RD2 accounts towards 16% State Government contribution under the Scheme.

On similar lines, the thrift scheme for powerloom weavers, which involves Government contribution @ 8% of wages matching the individual contribution of 8% of his / her wages, has also been extended till 2023-24. Government has sanctioned and released Rs. 10 Crs. in Mar 2022 benefitting 12,411 weavers.

Chenetha Mitra (Input Subsidy Linked Wage Compensation Scheme)

The State Government is providing 40% subsidy on yarn, dyes & chemicals in addition to 10% Government of India subsidy to all weavers / ancillary workers within and outside the cooperative fold. Out of 40% subsidy only 5% goes to the Yarn purchaser and remaining 35% goes to the weavers & ancillary workers' bank accounts on prorata basis of their wages earned. This has resulted in 30% increase in their wages. Till date an amount of Rs. 37.86 Crs. subsidy has been released directly into the bank accounts of 20,501 beneficiaries in the state.



Handlooms & Textiles

Nethanna Bhima (Group Life Insurance Scheme)



Government of Telangana launched Nethanna Bhima (Group Life Insurance) Scheme on par with Rythu Bhima in Telangana on the occasion of National Handloom Day 2022 and entered into an MoU with the Life Insurance Corporation of India by releasing an amount of Rs.21.09 Crs. to LIC. The scheme was implemented from 14th August 2022 to cover Handloom and Power loom weavers and ancillary workers under LIC of India Insurance Scheme for the year 2022-23.

The scheme provides life insurance coverage of Rs.5 lakh to the family of the weaver / ancillary worker, in the age group of 18-59 years and attached to Geo tagged looms. In the event of his / her death, the death benefit amount of Rs.5 lakhs will be credited to the bank account of nominee family member of the deceased weaver within 10 days. So far 35,999 members have been identified as eligible members under Nethanna Bhima. Further 65 death claims have been settled and Rs.5 lakh disbursed to the nominees in each case.

Sri Konda Laxman Bapuji State Awards to Weavers



The Government of Telangana confers "Sri Konda Laxman Bapuji State" Awards to the Weavers and Designers every year on the eve of National Handloom Day on August 7th.

The Award consists of Cash Price of Rs. 25,000/-, Merit Certificate, Handloom Memento and Shawl. During the year 2022, twenty-eight weavers & designers from across the State were selected and honored with Sri Konda Laxman Bapuji State award on National Handloom Day celebration at People's Plaza, Hyderabad.

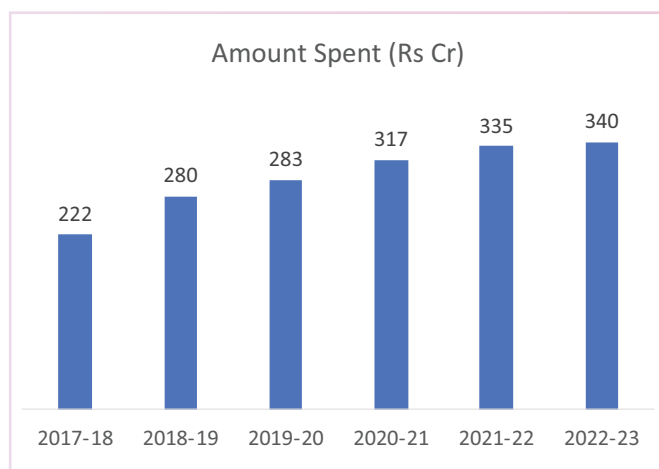
National Handloom Day 2022



The Government of Telangana has been celebrating the National Handloom Day every Year since 2017. During the Year 2022 National Handloom Day celebrations were held at Peoples Plaza, Necklace Road, Hyderabad. A Handloom Exhibition was conducted for 10 Days from 6th to 15th August. Further a fashion show was also organized at State Art Gallery, Madhapur, to showcase Telangana Handloom products.

Handlooms & Textiles

Bathukamma Sarees Scheme – Support to Telangana Powerloom Industry



Since 2017, Government of Telangana distributes sarees to all women above 18 years of age as a gift on the eve of "Bathukamma Festival" in Telangana State. The main objectives of the Project are i) Providing continuous employment to powerloom weavers with increased wages for improvement of their living standard and ii) To honour the women of Telangana State on the auspicious day of the state's biggest festival. An amount of Rs. 1777 Crs. has been spent by the Government from 2017-18 to 2022-23, to provide continuous work to the power loom weavers under the programme. The monthly income of weavers has doubled from approx. Rs. 8,000/- to Rs. 16,000/- and some active weavers are earning as high as Rs. 20,000/- per month due to this scheme.

Textile and Apparel Sector

The year 2022-23 saw strengthening of the economic revival in Telangana textile and apparel sector. The implementation works for some of the prestigious projects such as Apparel park, Weaving Park and Common Facility Center at Sircilla as well as the Kakatiya Mega Textile Park at Warangal saw substantial progress during the year.



Inauguration of Welspun's 2nd Investment in Telangana



The Non-Woven Spunlace & Wet Wipes Unit of Welspun India Ltd (WIL) at Village Chandanvelly, Ranga Reddy District was inaugurated by the Industries Minister Mr. K. T. Rama Rao on 22nd Feb. 2023. The total capital outlay for the project is Rs. 406 Crs. of which Rs. 290 Crs. has been invested. The Non-Woven Spunlace manufacturing lines are used for production of Spunlace Rolls which are used for manufacturing of wipes as well as sold directly in the market including export.

Welspun India Ltd (WIL) is the 2nd largest terry towel manufacturer in the world and part of USD 2.3 bn Welspun Group which has presence in multiple countries and interests in diversified activities such as Steel Pipes & Plates, Textile, Steel, Infrastructure etc. This marks the conclusion of Welspun's 2nd investment in Telangana after Welspun Flooring Ltd commissioned its Rs. 1267 Crs. flooring project in 2019.

Ground-Breaking Ceremony at Kitex Mega in Kakatiya Mega Textile Park, Warangal



Handlooms & Textiles

Minister for Industries and ITE&C Mr. K. T. Rama Rao and Minister for Panchayat Raj and Rural Development Shri Errabelli Dayakar Rao laid the foundation stone for Kitex Group's 1st investment project in Telangana at Kakatiya Mega Textile Park, Warangal on 7th May 2022. The company, which is the 2nd largest manufacturer of infant apparel in the world and part of the Anna-Kitex group of companies with interests in textiles, garments, vessels, spices & aluminum, will be setting up an integrated fibre-to-apparel manufacturing cluster with a capacity of 7 lakh garments per day at an investment of Rs. 1200 Crs. The cluster, expected to be spread over 200 acres in KMTP, will employ more than 11,000 people directly, more than 85% of which will be women employees. The entire investment will be operational by Dec 2023 with the first unit going live by the end of Aug 2023.

In 2021, Kitex entered into an MoU with Govt of Telangana committing to set up integrated fibre to apparel manufacturing clusters in Warangal (Kakatiya Mega Textile Park) and Rangareddy (Sitarampur) Districts with a total investment of Rs. 2400 Crs. The integrated clusters will generate a direct employment for 22,000 people, comprising 85% women employees.

Inauguration of Ganesha Ecosphere's Projects at Kakatiya Mega Textile Park, Warangal



Minister for Industries & ITE&C Mr. K. T. Rama Rao and Minister for Panchayat Raj and Rural Development Shri Errabelli Dayakar Rao inaugurated the 1st phase of twin projects by Ganesha Ecosphere at Kakatiya Mega Textile Park, Warangal on 7th May 2022. The largest PET bottle recycling company in the country has invested close to Rs. 450 Crs. in the manufacturing unit of recycled polyester fibre and yarn among other products. The plants, being set up in an area of 50 acres, will be in compliance with USFDA & EFSA norms

to recycle PET bottle waste into premium quality products. The two plants employ more than 360 people directly and recycle approximately 60,000 tonnes of waste PET bottles per annum thereby contributing towards sustainable development of Telangana.

Approval of Kakatiya Mega Textile Park as a PM Mitra Park



Recognizing the efforts of Telangana Government, in supporting the textile and apparel industry compete on scale by way of envisioning and setting up Kakatiya Mega Textile Park in Warangal, Government of India accorded approval to the park under the PM Mega Integrated Textile Regions and Apparel (PM – MITRA) Parks scheme.

Of the 13 states that applied under the scheme, Telangana was one among the seven states – others being Tamil Nadu, Gujarat, Karnataka, Madhya Pradesh, Uttar Pradesh and Maharashtra – that were selected based on detailed evaluation criteria. Under the scheme, GOI will support setting up Core and Support infrastructure by way of a grant of Rs. 500 Crs. for the park. This will help Telangana expedite the ongoing infrastructure works at KMTP as well as attract more international and local investors to the park eventually helping create a thriving textile and apparel ecosystem for natural and man-made fibres including technical textiles.

Creation of Apparel Manufacturing Export Ecosystem in Sircilla



The Sircilla Apparel Park, which is being set up in 60 acre area in Pedduru Village with a project cost of Rs. 175 Crs. to increase the value addition in the Sircilla Powerloom Cluster, witnessed commencement of garment manufacturing activities.

In 2021-22, the Government signed agreements to provide apparel manufacturing factory sheds on plug & play built-to-suit (BTS) basis with two leading garment exporters – Gokaldas Images Pvt Ltd and Texport Industries Pvt Ltd, with more than 25 factories in all, mostly in Bangalore, and employing more than 10,000 persons each.

While Gokaldas Images commenced operations at its 67,000 sft factory set up by the State Government in March 2022, it ramped up its capacity in FY 2022-23 to 600 machines and currently employs about 700 women from nearby villages. On the other hand, works at 1,77,744 sft factory for Texport Industries are nearing completion and the facility will be handed over to the company by the Government by end of May 2023. Thereafter, the Company will install 1000 machines and employ more than 2000 persons, mostly women, in a phased manner.

The park will create an impetus for the existing powerloom ecosystem in Sircilla and encourage value addition by converting fabrics into garments and to diversify the skill base of the women for alternate livelihoods.

Weaving Park at Peddur, Sircilla



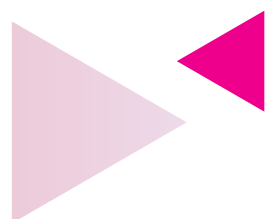
The Government of Telangana is developing a weaving facility by establishing group work shed units for weaving at Peddur Village in Sircilla. The works are in full swing at site for construction of 50 industrial sheds that will house 4416 semi-automatic looms and 60 warping machineries along with other common facilities in 88 acres of land. Multiple industrial sheds are nearing completion and the process of selection of vendors for supply of looms is ongoing.

In total, the State Government will spend Rs. 356 Crs. towards setting up industrial sheds and subsidizing 50% of the cost of powerlooms. Through this project the State Government intends to address the critical infrastructure gaps impeding the growth of the power loom cluster by addressing the gaps in weaving infrastructure. It will release the weavers from the clutches of master weavers and thus encourage the objective of "Worker to Entrepreneur". It would facilitate production of quality fabric and value-added products. This would also encourage the stakeholders to diversify the product base and broad basing of the skill base of the manpower.

Policy Initiatives: Telangana Textile and Apparel Policy (T-Tap 2017-22)

In order to facilitate incentive claims and for prompt settlements disbursement under Telangana Textile and Apparel Policy (T-TAP), as well as transparency, tracking of applications and automation, the Department of Handlooms and Textiles launched T-TAP Online. During the period 2021-22, 126 incentive applications were received from more than 40 textile units which have been set up in the policy period.

Total incentives worth Rs. 295.6 Crs. have been sanctioned and approved under the scheme of which Rs. 83.3 Crs. has been disbursed while remaining amounts are under disbursement. In view of the substantial progress in attracting textile and apparel investments in Telangana, the policy period has been extended until further notice.



Logistics



<https://invest.telangana.gov.in/logistics/>

The logistics sector, economic growth & industrial development have a symbiotic relationship, where the growth of one sector has a positive impact on the other two. As the State of Telangana marches to be a leader in Ease of Doing Business (EoDB), it is also making efforts in integrating its logistics position in the State.

A well-functioning logistics sector can act as a catalyst for economic growth, while economic growth can, in turn, drive the demand for logistics services. The logistics sector plays a critical role in supporting economic growth by facilitating efficient supply chains, creating jobs, facilitating trade, driving infrastructure development, and fostering innovation. Critical services of logistics sector will enable industries to optimize their supply chains, expand their market reach, manage inventory, offer customization, and leverage innovation and technology.

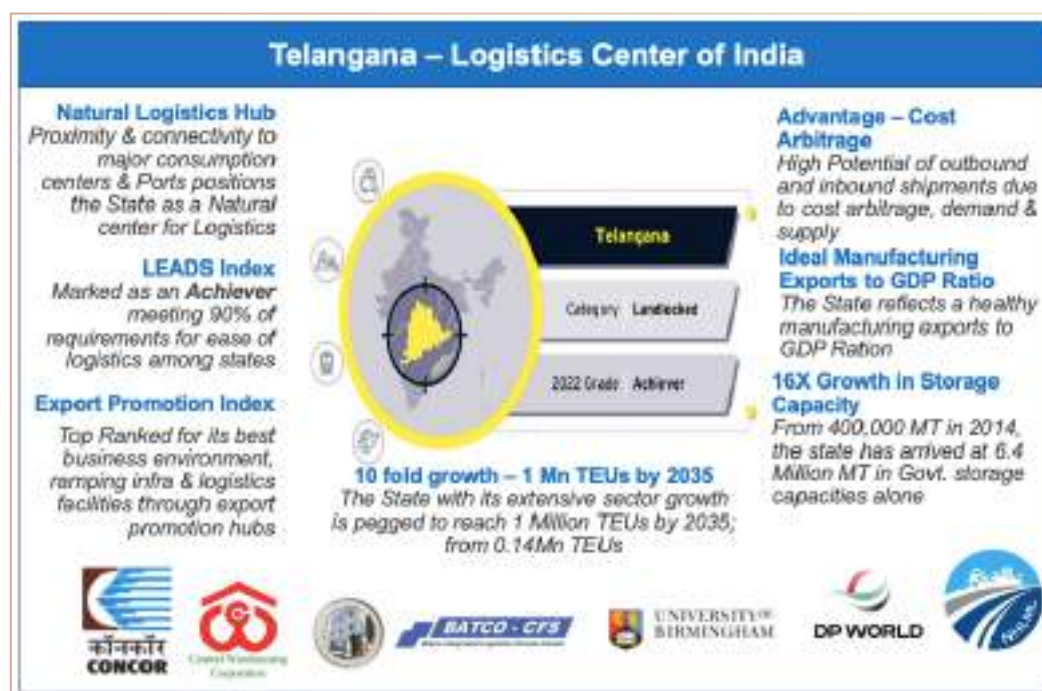
Telangana, considering the sectoral potential has categorized Logistics as a thrust sector alongside key manufacturing sectors. It is one of the first states to create the Logistics Division to cater to the needs of the Logistics Sector during the year 2017. Subsequently, it has rolled out Logistics Policy

in 2021 to promote logistics infrastructure, enable complimentary connectivity infrastructure, promote high-capacity commercial fleet, technology upgradation in improving service delivery and encouraging innovation through Start-ups.

Telangana Emerges as an 'Achiever' Among Landlocked States in LEADS 2022

The Logistics Division of DPIIT, Ministry of Commerce & Industry, undertakes an annual Logistics Ease Across Different States (LEADS) survey; based both on User/Service Provider perception and Objective data provided by States/UT; in all States/UTs to assess the logistics ecosystem and uses a robust statistical model to grade them on performance. The State has stood out as an achiever among land locked states meeting >90% of requisite attributes that indicate logistics preparedness and efficiency.

In the parameters of quality of rail infrastructure, quality of modal services, quality of services at terminals, timelines of transportation services, timelines of terminal services, Telangana emerged as an undisputed leader.



Multimodal Logistics Park in Medak, Telangana – Gateway for cargo, connecting India

Telangana State Trade Promotion Corporation (TSTPC), NHLML and Rail Vikas Nigam Ltd have entered an MoU to establish a world class logistics facility in Medak. Positioned in close proximity to Manoharabad Railway junction, NH44 and the regional ring road, this project has the potential to be the NORTH-SOUTH-CARGO GATEWAY of India. Currently, the project is in the advanced stages of Land acquisition (~320 Acres) in Parikabanda, Medak.

GATISHAKTHI & Telangana State Master Plan (SMP)

Gatishakti is the National Master Plan for Multimodal Connectivity that envisions to provide competitive

advantage for Manufacturing in India. As a part of State Master Plan, Telangana State has submitted 17 Projects. The project of approach road from NH-65 to NIMZ Phase-I was sanctioned with 100 Crs. This master plan has technology component that focusses on integrating data for enabling data-centric decision making, Telangana has completed syncing 27/30 essential layers data.

DPIIT, Ministry of Commerce & Trade organized 2nd Regional Workshop (South) on Gatishakti on 10th-11th March 2023 in Kochi, Kerala. This workshop focused on service improvement framework & Gatishakti, first-last mile connectivity issues for user sectors like food, fertilizer, coal etc; critical transport infrastructure gaps in budgetary allocation etc. The Special Secretary, Shri. E. Vishnu Vardhan Reddy, IFS presented best Practices of Telangana in addressing gaps and experience of Gati Shakti vision of NMP/SMP.



CCUB 2022 : Integrating logistics for growing needs of Pharmaceuticals Sector

On 15th September, 2022 Dr. Jayesh Ranjan, Principal Secretary Industries & Commerce, and Information Technology, Government of Telangana inaugurated Cold Chain Un-Broken (CCUB), an industry initiative by WIZ, and unveiled the next generation 1500x pharma container of SkyCell. Foraying various efforts of the State in Sustainable cooling, Cold-Chain Supply to accelerate deployment of energy-efficient refrigeration for food and vaccine supply chains across the country stated Telangana's potential to be Asia's Pharma Hub.



Hyderabad – First in India to launch Amazon Air Freight Services



Amazon on 23rd January 2023, launched its cargo services at GMR Aero Technic in Hyderabad to improve the transportation system and enable quick delivery. The cargo service, Amazon Air, will have two dedicated cargo aircraft with a capacity of 20,000 packages. After the US and Europe, India is now the third market

to be covered by the Amazon Air service. Telangana Industries Minister Mr. K. T. Rama Rao formally launched Amazon Air, stating that the launch of Amazon Air was a great moment in the Indian e-commerce industry and it will only scale with the YoY Air Cargo traffic demand growing at 35%.

User Sector Logistics: Integrating Agri-supply chain



ITC Opens an integrated food manufacturing & logistics facility at Medak Telangana in January 2023. Spread over 59 acres, with 6.5 Lakh Sq Ft area, this 450 Crs. project is first of its kind where, the agricultural supply chain for consumer products is well integrated with state of art packaging & logistics facility alongside the product manufacturing and processing. Minister for Industries remarked on the logistical advantage of this project and encouraged ITC to use local produce for Global Markets.

State to Support Exporter's by Offering Timely Redressal



The first meeting of the TS Exporters Grievances Committee meeting was held on 28th March 2023 at 12.30 Hrs in the Board Room of TSIL Ltd, 6th Floor Parishram Bhavan, Basheerbagh, Hyderabad. It was

presided by Special Secretary to GoT, Industries & Commerce Department; Director of Industries & Export Commissioner. Issues faced by TS Exporters were taken into account with a request to submit written representations, ADGFT was requested to submit the draft district wise export action plan covering all the districts in the state, turmeric board & FIEO were asked to knowledge transfer key schemes and agencies considering needs of Exporters.

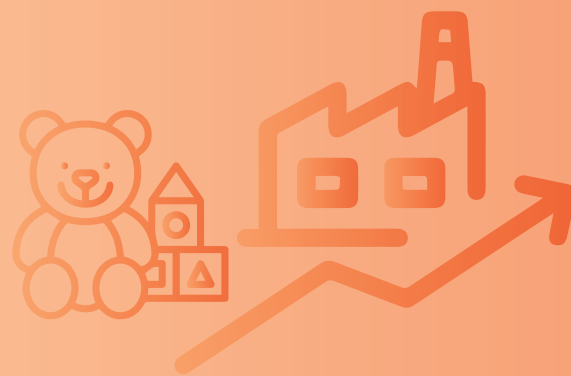
First International Conference on Shipping & Logistics



The first International Conference on Shipping & Logistics was held on 23rd November 2022 at HICC, Hyderabad. This event attracted Stalwarts of Logistics & Shipping Industry, EXIM Professionals, Logistics Experts, MSME Tech Service Providers, Freight forwarders, MMLPs & Warehouse service providers. This event was themed around opportunities in land locked states; strategy to achieve 10 Mn MT 2030 with a special focus on cold chain, time and temperature sensitive cargo; ULIP-Block Chain and IoT in Logistics, Drone Delivery; Last mile challenges. This event was successful in bringing MSMEs and exporters close to the advances in the logistics sector and focused on how they could benefit alongside positioning Telangana as the Logistics Hub of South & Central Asia.

Toys

<https://invest.telangana.gov.in/>



The global toys market attained a value of USD 101.9 billion in 2022 and is expected to grow in the forecast period of 2023-2028 at a CAGR of 4.8% to reach an estimated value of USD 135 billion by 2028. The global market for toys is being driven by the increasing demand for interactive toys. The rising expenditure on educational toys and games is projected to propel the demand for the product in the emerging economies.

India's local toy & games industry is set to play a crucial role in realising India's aspirations that will merge the best of tradition with a modern, global outlook. The growing demand for movie and comic character plush toys, along with collectible action figures, is expected to bolster the market growth. The various advancements in 3D printing technology are projected to increase the demand. Other factors such as increasing population, rapid industrialisation and urbanisation are expected to aid the growth of the industry over the forecast period.

The rising awareness of the positive impact of toys on the overall development of children is also anticipated to aid the market growth. Additionally, the launch of STEM toys play a major role in developing science, technology, engineering, and mathematics skills in children. Toys are, at once, both the things to play with and a means to learn. While leaving an indelible impression, toys aid children develop mental and cognitive faculties. Toys are also a crucial medium for children to learn about tradition and culture.

Telangana State has various toy manufactures – Traditional Toys, STEM toys, Electronic toys, Soft toys etc. With the state being the highest producer of cotton, many soft toys manufacturers have set up their units here. Telangana being a hub for manufacturing, high quality toy ancillaries are easily available here based on industry requirements. Thus, it has opened doors for new investors in the sector. On the economic front, toys are a source of employment generation. India has now set the ball rolling for a self-reliant toy industry.

Telangana Toy Innovation

Rural innovator Ganesh Yakara from Warangal came up with an interactive sensor-based humanoid by name Samskar Toy to help students understand the safety measures against sexual abuse. The toy is devised with a sensor mechanism and sends alerts when touched at parts subject to sexual abuse, making it an easy yet interactive method to help parents/educators educate children. It is highly encouraged to use interactive resources/ methods in schools and at homes for the better understanding of children against sexual harassment. The product has been tested thoroughly for quality, safety and robustness and has been categorized as a good initiative for creating a safe environment for children. Govt of Telangana is supporting this innovation in various forms along with technical support from T-work and TSIC.



Telangana Toy Park

Telangana is all set to develop an exclusive Toys cluster at Dandumalkapur on National Highway 65, just 20 kms from Hyderabad ORR. Spread over 106 acres, the Telangana Toy Park will have world class infrastructure and facilities to promote manufacturing of soft toys, STEM toys, electronic, plastic and silicone toys. It will also have plug and play facility to support MSMEs and provide an opportunity for regional artisans making wooden toys. Developed by Telangana state industrial infrastructure corporation - TSIIIC, the park will also have a Toy Museum, Common Facility Center, Research & Development facility, Skill development centre and children's amusement park facility etc., to support toy manufacturers and reduce the cost of production. Besides manufacturing, the Park will give impetus to R&D which is important in the supply chain.

The industrial park is well connected and less than one hour's drive from Hyderabad International Airport. Hyderabad city is centrally located, and one can reach the city within a few hours from all major cities in India. Hyderabad has been ranked the most liveable city in India for the last 3 consecutive years and offers a large pool of talent. The city is also home to a number of ancillary units that can support the toys industry. The Park will be fully operational by end of 2023. With the proactive measures and business friendly initiatives of the Telangana government, the Toy manufacturing sector is poised for rapid growth

and will make Telangana a powerhouse in export of Toys from India.

Potential investors are submitting their DPRs and ready to kick start their manufacturing soon after the launch of toy park. Toy Association of Telangana is also encouraging new players to set up their units in the state and creating awareness via events such as Toy Expo, advertisements and participation in international expos.

Toy Expo

Toys Association of Telangana (TAT) organized a 3-day Hyderabad Toys Expo 2022 at Hitex Exhibition Center which was launched on 26th May. Manufacturers, wholesalers and distributors took part in it in large numbers. The Expo was very successful as the foot falls were more than 4000.



Retail and eCommerce



<https://invest.telangana.gov.in/retail/>

Retail and eCommerce sectors have been gaining a lot of prominence in Telangana in the last few years. The Indian ecommerce sector is on an upward trajectory and is on its way to becoming the third largest market in the world by 2030.

Hyderabad Retail Summit 2023



Retailers Association of India (RAI) hosted the second edition of its Hyderabad Retail Summit (HRS) on April 19, 2023 at the Hotel ITC Kohenur Hyderabad. This edition of HRS was aimed to help retailers find the right partners for taking their retail business to the next level.

The Hyderabad Retail Summit (HRS) 2023, hosted in-depth panel discussions on topics such as The Art of Retail Strategy: Balancing Innovation and Tradition, Staying Ahead of the Curve: Adapting to Changing Retail Technology, and Navigating CX: Building Loyalty Through Customer Experience. Sharing valuable insights on these panels were some prominent faces of the retail industry.



Open Network for Digital Commerce (ONDC)

Open Network for Digital Commerce (ONDC) has been set up to democratize the ecommerce sector in India and make it more inclusive and accessible to consumers. The idea of Open Network goes beyond the current platform-centric digital commerce model where the buyer and seller must use the same platform/application to do a business transaction. Instead, in ONDC's network-centric model, so long as platforms/applications are connected to the open network, buyers and sellers can transact no matter what platform/application they use to be digitally visible.

Telangana State GlobalLinker is now a network partner for ONDC. This means that buyers and sellers that have created their online stores with GlobalLinker, now have the option to join ONDC. This will vastly improve their visibility and they will be part of what is being called 'everyone's commerce' where anyone can sell and everyone can buy from each other online.

ONDC Awareness Workshop

Government of Telangana, along with ONDC, TS GlobalLinker and FTCCI organized a session on 'How Open Network for Digital Commerce (ONDC) can be a game changer for businesses' at FTCCI. Through the event, the Govt. and ONDC team emphasized the importance of ONDC in democratizing e-commerce businesses as UPI did for payments across India. The digital platform Telangana State GlobalLinker has become ONDC compliant, and any seller onboarded onto the platform will be discoverable to consumers across India through other platforms which are ONDC compliant.



ONDC Awareness workshop

MSME

<https://invest.telangana.gov.in/msme-full/>



Telangana State has an estimated 26 lakh MSMEs with micro-enterprises alone accounting for more than 25 lakh units and the remaining units are small and medium enterprises. MSMEs are the largest employers in the State after agriculture and construction sectors. During FY-2022-23, Government of Telangana undertook initiatives and partnered with various institutions to support MSMEs.

Govt. Collaborations to support MSMEs

MoU with Invoicemart



An MoU was signed between Government of Telangana and Invoicemart on 3rd March 2023 to create awareness amongst State MSMEs about the TReDS platform through seminars, workshops and one-on-one meetings. TReDS is an electronic platform for facilitating the financing / discounting of trade receivables of Micro, Small and Medium Enterprises (MSMEs) through multiple financiers. The collaboration will also support popularization of the Invoicemart platform and onboarding of more MSMEs on the platform from the State.

MoU with Meesho

Government of Telangana signed an MoU on 9th November 2022 with Meesho which operates an online marketplace www.meesho.com and the Meesho app, that enables sellers to sell



their products to customers across India. Telangana government in collaboration with Meesho, is working with MSMEs in the State and providing them a platform to launch and grow their businesses online. Meesho is currently conducting training modules through local associations to help MSMEs understand the basics of running an online business including Seller account creation, Cataloguing Process, Marketing. Meesho will also provide ongoing support to address queries and help MSMEs in driving further business growth after initial activation.

MoU with Just Dial

Government of Telangana signed an MoU in March 2022 with Justdial, one of India's largest search engines, in a bid to digitize MSMEs in the State. The partnership will help MSMEs adapt to ways of doing business digitally, guide them to realise their full marketing potential, and reach out to customers in an effective way. Besides getting access to Justdial's deep reach and penetration in the market, Justdial also aims to provide these MSMEs access to the brand's other offerings soon like JD Mart, India's fastest growing B2B platform, JD Xperts, a platform for on-demand home services and JD Pay, an online payment system for traders, businesses of all size. The MoU will also help increase the ease of doing online business for MSMEs in Telangana. Just Dial will provide registered MSMEs of the State with free listing facilities and other services under the MoU for a period of 3 years.



SIDBI Meeting and MoU Updates

Dr. Jayesh Ranjan, IAS, Principal Secretary Industries & Commerce Dept. met Shri. Sivasubramanian Ramann, IA&AS, CMD of SIDBI along with Industries dept. officials to discuss points of collaboration between SIDBI and Govt. of Telangana on 30th August 2022. Telangana Industrial Health Clinic and T-Hub officials were also part of the discussion meeting.

Government of Telangana had signed an MoU with SIDBI in January 2022, under which a 2-member PMU team is working closely with Industries dept. to



support the MSME ecosystem in Telangana. As part of the engagement, Dr. Jayesh Ranjan launched a Compendium of MSME Schemes and Induction cum Orientation Manual on Cluster Development on August 18. The document is now uploaded on the industries website.

Other projects underway are Investor facilitation cell concept for DICs, preparation of model cluster visit program, MoUs with NSIC, KVIC etc. to pool resources on awareness programs, development of State Credit guarantee model for MSMEs, preparation of Telangana State MSME profile, collaboration with TSIIIC to extend credit facility to MSMEs in industrial parks, impact evaluation of TIHCL schemes etc.

Raising and Accelerating MSME Performance (RAMP)

"Raising and Accelerating MSME Performance" (RAMP) is a USD 808 million (Rs 6,062.45 crore) World Bank assisted programme, supporting various COVID Resilience and Recovery Interventions of the Ministry of Micro, Small, and Medium Enterprises (MoMSME).

Launched based on the recommendations from the UK Sinha Committee report in June 2019, the programme has two result areas (i) Strengthening Institutions and the Governance of the MSME program; (ii) Support for Firm Capabilities, Access to Markets, and Access to Finance. The four recurring themes across interventions in the two Result areas include – (a) gender i.e., improving outcomes for women entrepreneurs through improved access to finance and MSME support programs; (b) greening i.e., supporting the adoption of Resource Efficiency and Cleaner Production (RECP) practices by MSMEs; (c) technology i.e., use

of technology platforms to effectively deliver MSME support services at scale; and (d) private sector i.e., the key role of the private sector in delivering services to MSMEs. RAMP supports this overall Programme and focuses primarily on building capacity of National and State level agencies, build platforms for provision of critical services to MSMEs and enhancing outcomes from competitiveness related schemes.

Currently, KPMG has been finalized as the consulting agency for preparation of the Strategic Investment Plan (SIP). The consultation process has started and the agency will conduct a comprehensive and detailed diagnostic exercise covering the entire state of Telangana. The SIP document will provide an overview of MSME ecosystem in the State and also identify challenges with respect to the MSMEs in the state and prescribe a roadmap to enhance their competitiveness. A roadmap of 8-10 years will be prepared for enhancing performance of MSME sector in the State. The implementation period for RAMP is 4 years. Ministry of MSMEs will provide funding support for implementation of projects selected by their committee post submission of SIP document to MoMSME.

TS GlobalLinker Updates



Mr. K. T. Rama Rao opened up 'Indian Business Portal' – www.indianbusinessportal.in for the businesses of Telangana which is an international trade hub, connecting Indian exporters with foreign buyers. This digital platform aims to facilitate matchmaking between sellers and buyers across a very wide range of products and services, including GI products from India.

Indian Business Portal already hosts 2500+ Indian sellers and is witnessing foreign buyer queries from across the world. Early success has led to the extensive outreach program by GlobalLinker for seller onboarding and by Federation of Indian Export Organizations (FIEO) for buyer onboarding.


TS GlobalLinker Growth Talk Series

The GlobalLinker Growth Talk series brings together the forces of industry specialists and domain experts to share practical knowledge with the member MSMEs. Several webinars were organized during the year for MSMEs on important topics such as-



Union Budget 2023: Impact of Budget on MSMEs – Budget highlights and new initiatives & schemes were presented in the special webinar by an expert CA, just after the budget was released.

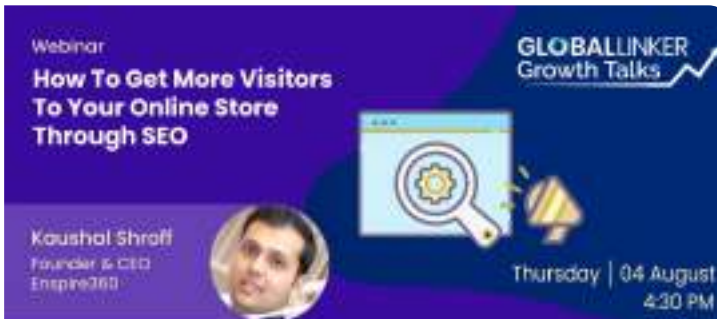
Indian Business Portal Seller Meet – Dedicated training sessions for exporters are conducted every fortnight throughout the year to explain the process of onboarding on the Indian Business Portal as well as its importance and benefits.





DigitALL: Digital Growth for All with Digital Innovation & Connections – Unique webinar was organized for Women’s Day to recognize entrepreneurs and provide relevant business solutions by industry & government lady experts.

How to Get More Visitors to Your Online Store Through SEO – Special webinar session was conducted by an SEO expert explaining why Search Engine Optimization (SEO) is important and how customers are searching for products.



Telangana State Leather Industries Promotion Corporation Limited (TSLIPC)

<https://invest.telangana.gov.in/>

Objectives of TSLIPC

- Promotion of Leather Industry in Telangana State
- Skill Upgradation / Training Programme to SC Leather Artisans and Unemployed Youth
- Marketing Activities to meet the Leather/ Alternative goods demand of the various Govt. Depts. and Government Agencies

Promotion of Leather Activities in Telangana

Telangana State Leather Industries Promotion Corporation Limited (TSLIPC) has signed an agreement (MoU) with Central Leather Research Institute (CLRI), Chennai for Development of 6 Mini Leather Parks under PPP model as follows:

S. No.	Mini Leather Park	District	Land in Acres
1	Pollepally	Mahabub-nagar	25.00
2	Dandempally	Nalgonda	25.06
3	Mandamarri	Mancherial	24.00
4	Jinkunta	Nagarkurnool	25.00
5	Rukmapur	Karimnagar	40.01
6	Mallemadugu	Khammam	25.13

Central Leather Research Institute (CLRI), Chennai would provide assistance for inviting, engaging and partnering with the Multi National Companies (MNCs) and Mega Leather Units (MLUs) which would also provide scope for local companies to be part of the supply chain under PPP model.

After establishment of MNC's in the Leather Park, a Leather Cluster with ancillary units will be developed for assisting the MNC units. These ancillary units would be developed by encouraging local SC trained candidates. Preparation of DPRs is under process.

Armooor Leather Cluster in Nizamabad

Under MSME Cluster Development Programme, TSLIPC has proposed to setup Industrial Infrastructure Development Center, under MSE – CDP scheme of

GOI at Armooor (V&M), Nizamabad District. The State Government has released amount of Rs.2.61 Crs. as State Matching Share and the Government of India has released Rs. 2.00 Crs. towards 1st installment of its matching share of Rs. 7.39 Crs. The project impact is as follows:

- The total number of plots in the Mini Leather Park would be 150
- The project envisages direct employment of 1000 and indirect employment to 500 people
- Laying of Roads, leveling and construction of compound wall has started

Marketing Activities

TSLIPC Marketing activities involve fulfillment of the demand of leather products / footwear to Government Departments such as Social Welfare/ Tribal Welfare, Telangana Minorities, Police Department, National Academy for Construction (NAC), etc.

S.No	Year	TSLIPC Sales (in Rs.)
1	2015-16	3,06,63,439
2	2016-17	3,86,66,422
3	2017-18	8,60,85,655
4	2018-19	16,44,49,848
5	2019-20	13,00,00,000
6	2020-21	34,00,000
7	2021-22	97,35,166

Skill Upgradation Training Programmes

TSLIPC has provided Skill Upgradation Training Programme to SC youth from all the Districts of Telangana State in reputed institutions such as:

- 1 year Training programme in Central Leather Research Institute (CLRI), Chennai
- 6 months Training programme in Footwear Design and Development Institute (FDDI), Hyderabad
- Training in Leather Goods Table Work Operator, Leather and Rexene Goods Maker (MES) and Leather Goods Salesman (MES) in Coordination with Andhra Pradesh Productivity Council (APPC)

Telangana State Trade Promotion Corporation (TSTPC)

<https://tstpc.telangana.gov.in/>



Consequent to the bifurcation of erstwhile state of Andhra Pradesh and APTPC in 2014, Telangana State Trade Promotion Corporation Ltd. (TSTPC) was incorporated on 27.09.2014 under the Companies Act 2013 with a mandate to promote external trade by taking up trade promotional activities, creating logistics infrastructure and continue the existing business of manufacture and sale of Golkonda brand notebooks and other paper products to Govt. Welfare Departments and Open Market.

Demerger proposals of APTPC (Assets & Liabilities and Staff) as on 01.6.2014 have been approved by the Expert Committee and the same was submitted to the Government for approval. Approval of the Government is awaited.

Activities of TSTPC

Manufacture and sale of "Golkonda" brand note books and Plain Copier Paper

TSTPC is in the business of manufacture and sale of note books since 1979-80. TSTPC has its own infrastructure – Godowns and Administrative Building. It has achieved sales target of Rs. 54 Crs. during the FY 2022-23.



Establishment of Logistic facilities

- **Established a Container Freight Station** in an area of 7.01 acres at Mamidipally, Opp. to Hardware Park, near RGI Airport, Hyderabad for the use of trade and industry in Hyderabad and surrounding districts for the purpose of bonding and de-bonding their export / import cargo, Customs clearance, stuffing and de-stuffing of containers etc. Necessary action

has been taken to make it operational by appointing an O&M Operator

- **Development of Multi Modal Logistics Park near Hyderabad**

Government has nominated TSTPC as an Implementing Agency for development of Multi Modal Logistics Park (MMLP). MMLP is being developed jointly with National Highways Logistics Management Ltd. (a subsidiary of National Highways Authority of India) and Rail Vikas Nigam at Parkibanda village near Toopran, Manoharabad Mandal, Medak District. The process of acquiring the land required, i.e. 300 – 350 acres, is in progress.

MMLP will be a freight handling facility with rail and road accessibility, comprising of Container Terminals, cargo terminals, warehouses, cold storages, facilities for mechanized handling and value-added services such as customs clearances with bonded storage yards, testing facilities etc.,



Trade Promotion and other activities

- TSTPC is working with various industry chambers including Federation of Export Organisation (FIEO), DGFT, EEPC India, Federation of Telangana Chambers of Commerce and Industry (FTCCI), various Industrial Associations to conduct Export Awareness Programmes in Districts
- TSTPC supported MSMEs and Startups in the Food Processing Sectors to showcase their products by setting up Telangana State Pavilion in the Indus Food 2023 Expo in Hyderabad
- Conducted Export Awareness Programme for the General Managers of District Industries Centers, of Industries Department and Zonal Managers of TSIIIC Ltd. in March 2023 in association with Directorate of Industries, GoT

Telangana State Trade Promotion Corporation (TSTPC)



DGFT Workshop



GM DIC workshop



Indus Food Event



FTCCI awareness program

SNA for Raising and Accelerating of MSME Performance (RAMP)

The Government of Telangana in October 2022 has nominated TSTPC Ltd. as State Nodal Agency for the RAMP Scheme of the Government of India. M/s KPMG Consultancy Organisation is engaged for preparation of strategic investment proposals for the MSME Sector in the State of Telangana.

Sugar Department

<https://invest.telangana.gov.in/>



Department of Sugar has been working for self sustenance in Sugar & Ethanol production to achieve the objectives of New Biofuel policy and meet the Ethanol Blending Petrol targets. In this regard, the Department has taken steps for improving Production of Sugarcane, Sugar, Biofuel, etc., by diversification of sugar industry for promoting new distilleries and expanding existing distilleries under the new policy of Government thereby strengthening the sugar industry and stabilising the farm income of rural community and sustenance of sugarcane cultivation in Telangana. It is a fact that the Sugar industry is the only source for driving different ancillary industries such

as Confectionary, Beverages, Food processing and to some extent transport, farm machinery etc.

The government of India has set a target of 43 Crs. Ltrs of Ethanol to be supplied by Telangana State towards Ethanol Blending Petrol Program so as to reach 20% blending by 2025.

The Sugar industry is providing annual employment of not less than 30,000 by direct & indirect in Sugar, Power & Ethanol production and contributing revenue to the exchequers through GST on Sugar, Ethanol, Molasses and other by-products besides taxes on raw materials used in the industry.

Overview of Sugar Industry

S. No	Name of the Sugar Factory	Year of Establishment	Capacity Crushing Per Day (MT.s) (TCD)	Optimum Cane Required for 130 Days Season (Lakh MTs)	Distillery Installed Capacity (KLPD)	Cogen Installed Capacity (MW)
A COOPERATIVE UNITS						
1	Nizamabad Coop sugars, Nizamabad	1964-1965	1250	1.63	0.0	0.00
B GOVERNMENT JOINT VENTURE UNITS						
2	NDSL-Bodhan	1951-1952	3500	4.55	31.5	20.00
3	NDSL-Medak	1987-1988	2500	3.25	30.0	0.00
4	NDSL-Metpally	1980-1981	2500	3.25	0.0	0.00
C PRIVATE UNITS						
5	Ganpati Sugars Sangareddy	1996-1997	5000	6.50	30.0	15.00
6	Trident Sugars Zaheerabad	1972-1973	3500	4.56	0.0	0.00
7	Gayatri Sugars Kamareddy	1997-1998	3500	4.55	45.0	6.00
8	Gayatri Sugars, Maagi	2006-2007	3500	4.55	0.0	16.25
9	Kakatiya Sugars Kallur	1991-1992	3200	4.16	0.0	16.70
10	Madhucon Sugars Rajeswara Puram	1983-1984	3500	4.55	64.0	24.20
11	Krishnaveni Sugars Kothakota	2010-2011	3500	4.55	120.0	28.20
Sector Total (Working Sugar mills)			25700	33.41	259.0	106.35
Grand Total (Including defunct mills)			35450	46.09	320.5	126.35

Sugar Department

Performance – Sugar

Statement Showing The Cane Area , Cane Growers, Cane Crushed, Sugar Made, Recovery & FRP Paid To Farmers For 2022-23 Crushing Season In Telangana State

No Of Sugar Mills In Operation	Crushing Capacity of working mills (TCD)	Cane Area (In Ha)	No of Farmers	Cane Crushed (Lakh MTs.)	Sugar Bagged (Lakh MTs.)	Recovery	FRP paid (Rs. Cr)	Total Price paid with additional price (Rs. Cr)
7	25700	32761	23484	24.63	2.61	10.62	805	813

Performance – Ethanol & Co-Gen Power

Statement Showing Ethanol Produced & Supplied To OMCs, Co-Gen Power Produced & Supplied To Power Grid For 2021-22 Crushing Season In Telangana State as on 12-04-2022

Total No of Mills In Operation	Distillery In-stalled capacity (KLPD)	Ethanol produced (Kilo Bulk Litres)	Ethanol supplied to OMCs (Kilo Bulk Litres)	Co-Gen installed capacity (MW)	Co-Gen produced (MU)	Surplus power supplied to Grid (MU)
7	259.00	42558	18535	126.35	195.85	121.19

The state requirement of sugar is 7.39 Lakh MTs. (19.4 Kg X 3.89 Crs. population), and the balance sugar requirement is being met from the neighbouring states.

The Sugar department is enforcing various Central and State Acts & rules and has ensured cane price payment to farmers. Department encouraged farmers for sugarcane plantation and achieved 20000 Hectares as on date and is estimated to reach 20000+ Hectares for the ensuing 2023-24 crushing season, by supplying various inputs & infrastructural developmental activities on subsidy basis through Cane Development Councils in the factory zones with contributions of Sugar factories & Cane farmers. Sugar factories are also encouraging farmers by extending incentives, loans, subsidies etc., to sugarcane farmers so as to increase the cane areas/productions in their jurisdiction.

Intervention of Department for Cane Development & Diversification of Industry

- Motivating industry to encourage farmers by providing inputs, subsidies etc
- Encouraging/ supporting Research station by providing budget for development of High Yielding Varieties
- Coordinating with Agriculture & Horticulture Dept. for implementation of Farm mechanization and drip scheme

- Creating awareness among entrepreneurs and encouraging them for establishment / development of sugar complexes with diversification of existing units
- Promoting ancillary units and allied food processing units by utilising the schemes announced by Govt. of India. The vision is to achieve the concept of manufacturing hub in rural areas with an endeavor to generating more employment in the rural agro based industry sector

Encouraging Project Proponents in Biofuel (Ethanol) With Various Incentives

- The Government of India has approved 29 applications of the project proponents of Telangana state with capacity of 5713 KLPD and recommended for maximum loan amount of Rs.4240 Crs. under interest subvention scheme with annual production capacity of 171.39 Crs. Ltrs of Ethanol
- Another 5 applications directly received by the state Govt. for setting up of 5 units with capacity of 1648 KLPD and with annual production capacity of 19.44 Crs. Ltrs of Ethanol
- The state Govt. is offering Exemption / Remission of stamp duty on registration of land and also Land conversion charges
- Subsidy on capital invested and interest on capital
- Reimbursement of SGST etc
- Promoting the modified scheme to entrepreneurs and encouraging them to participate

Sugar Department

- Facilitation in arranging land, to get all clearances for new distilleries

Current Status of NDSL

In view of NCLAT, Delhi judgement to set aside the liquidations orders issued by NCLT Hyderabad, the Department is giving wide publicity to invite entrepreneurs to participate as strategic partners.

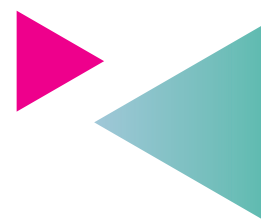
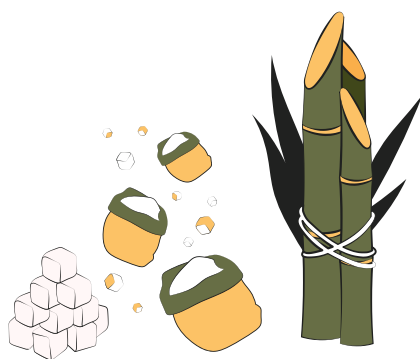
- For revival and running of closed three NDSL units located at Bodhan, Mombojipally and Muthyampet to produce Ethanol directly from sugarcane
- To reopen one NDSL distillery located at Bodhan and one Nizam sugars distillery located at Mombojipally and also to avail the benefits of policies announced by GOI



Sugar Industry Complex- (Sugar / Distillery / Co-Gen Units)

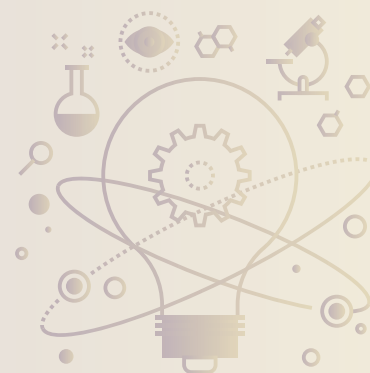


Sugarcane Cultivation / Production/ Harvesting



Research and Innovation Circle of Hyderabad (RICH)

<https://rich.telangana.gov.in/>



Launched in 2017 by the Government of Telangana, RICH aims to solve complex local and national challenges by facilitating collaborative networks between diverse stakeholders in the research and innovation space. RICH is also the Hyderabad Science and Technology Cluster, an initiative spearheaded by the Office of Principal Scientific Adviser to Government of India. As part of this initiative, RICH has initiated multidisciplinary projects in the areas of agriculture, sustainability, nutrition, health, waste management and more.

RICH operates in 3 major sectors: Food and Agriculture, Lifesciences and Sustainability.

Transformational major initiatives

Acceleration Initiative for Devices and Diagnostics

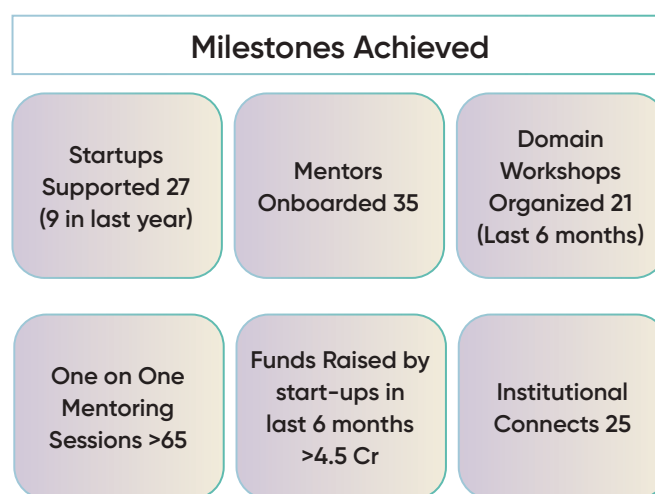
The Acceleration Initiative for Devices and Diagnostics (AID) programme addresses the medical devices sector by identifying and nurturing start-ups in this space for regional, national and global impact. The AID programme provides structured support for clinical advice, regulatory compliance, go-to-market strategies, and access to funding and market access through workshops and mentoring.

AID Cohort-3 start-ups are: Akumen Artificial Intelligence, Alfaleus, Chemioptic, Denevo Bio-Innovations, Heart Health, Kan Innovations, Padmaseetha, Symbiotic and Transform SciTech.

Several of our start-ups from the AID cohort 1 & 2 have won prestigious awards and recognitions from the industry. Recently, Briota Technologies Pvt Ltd., Urvogelbio Private Ltd, and Primary Healthtech won the ZS award which is a prestigious healthcare innovation award that aims to acknowledge and applaud innovation in healthcare by leveraging data, analytics, and advanced technology to achieve accessible and affordable healthcare outcomes for all.

Project Tej

In collaboration with Xynteo and Cyient, RICH, through Project Tej, helps start-ups in the medtech space with



clinical validation, usability assessment, business model evaluation, and market access. Our focus on evaluating business models and go-to-market strategies ensures that startups are well-positioned to reach potential customers and gain traction in the market.

The program includes three components. Firstly, it offers structured industrial mentorship to startups, focusing on validation, market access, and regulatory aspects. Secondly, it facilitates market access for validated technologies through public and private healthcare channels. Finally, it launches testbeds for the startups for their large-scale clinical validation, usability assessment, and business model evaluation. The goal of Project Tej is to support and accelerate the development of healthcare innovations in India, ultimately improving healthcare outcomes for the population.

Scholarship and Mentorship for Women in STEM



Research and Innovation Circle of Hyderabad (RICH)

Education and Careers

Research and Innovation Circle of Hyderabad (RICH) and Syngene International Ltd. officially launched a Scholarship and Mentoring programme in November 2022 to encourage women to pursue education and careers in Science, Technology, Engineering, and Mathematics (STEM).

The programme has selected 25 women students from across India in its first year and will provide them with mentoring and sponsorship for a period of 3-6 months. Some students have already started their internships since January 2023. The aim of the programme is to increase the number of women opting for STEM careers and create a self-sustaining network of women professionals in STEM. The selected candidates will receive a stipend ranging from Rs. 10,000 to Rs. 15,000. The students will be interning at Centre for Cellular and Molecular Biology (CCMB), Dr. Reddy's Institute of Life Sciences (DRILS), Dr. Reddy's Laboratories and Bharat Biotech.

The funding partner for the programme is Biocon Foundation, the CSR arm of the Biocon Group, with RICH being its implementation partner. With this programme, RICH is taking significant steps towards bridging the gender gap in STEM fields and empowering women in India at the grassroots level.



Team RICH with the 25 women students during the launch of the programme.

UNDP- Data for Policy

In the past year, RICH has been committed to achieving the goal of promoting climate-resilient agriculture practices on a global scale. The main focus was to map these practices on the UNDP-Data on the Climate Resilient Agriculture (DiCRA) platform, making them readily accessible to scientists and practitioners worldwide.

We have identified and documented 25 climate-resilient practices from three regions in Telangana - Wetland (Nalgonda), Garden land (Mahbubabad), and Dryland (Zaheerabad). The selection of these regions was based on their unique climatic conditions, soil types, and crop varieties. Our team worked closely with local farmers and agricultural researchers to identify these effective practices that are adaptable to changing climatic conditions.

We believe that the inclusion of these practices in the DiCRA platform will have a significant impact on promoting sustainable agriculture practices globally. By providing access to this information, we hope to enable scientists and practitioners worldwide to adopt climate-resilient practices, leading to increased food security and a sustainable future for our planet.

Milestones Achieved

**Mapped
25 Climate Resilient
Agriculture Practices**

**Documented and
compiled a 10-minute
video of the CRA
practices**

**Documented and
compiled a 3-minute
video for policy makers.**

**Developed a
compendium and field
story document of the
25 CRA practices**



Farmers from Garden land, Dryland and Wetland farming ecosystems of Telangana

Research and Innovation Circle of Hyderabad (RICH)

Green Hydrogen Valley

Aimed at developing a green hydrogen valley in the Telangana region, RICH is taking significant steps by bringing together the major players in the green hydrogen space.

A meeting was organised in Hyderabad by RICH and the Department of Science and Technology, Government of India (DST), aimed at conceptualising a green hydrogen valley in the state of Telangana, through stakeholder consultations on green hydrogen.

RICH held significant discussions with key industry stakeholders such as NTPC Renewable Energy Limited, Bharat Heavy Electricals Limited R&D (BHEL), the Nuclear Fuel Complex (NFC), the Heavy Water Board (HWPB), the Ramagundam Fertilizers and Chemicals Ltd (RFCL), the International Advanced Research Centre for Powder Metallurgy and New Materials (ARCI), IIT Hyderabad, Confederation of Indian Industry (CII) and Indian Railways, Kesoram Cements among others. Furthermore, RICH intends to remain a significant facilitator in this endeavour by identifying several industry specific use cases for Green Hydrogen.



Team RICH along with stakeholders from the Green Hydrogen space consisting of Producers, Consumers, Systems Integrators, Research Institutions, and government representatives

Demand Response Driven Energy Advancement

An industry and research consortium being led by Smart Innovation Norway (SIN) in collaboration with Research and Innovation Circle of Hyderabad (RICH), Indian Institute of Management Ahmedabad (IIMA), BSES Yamuna Power Limited (BYPL), BSES Rajdhani Power Limited (BRPL), And NOIDA POWER COMPANY LIMITED (NPCL) will be working on demonstrating Demand Side Energy Management. The above project consortium is being funded by The Norwegian Ministry

of Foreign Affairs and is one of the many projects under the Indo-Norwegian Task Force on Energy.

The consortium members signed the consortium agreement in the presence of his excellency Hans Jacob Frydenlund, Norwegian Ambassador to India and Shri. Dinesh Jagdale, Joint Secretary of the Ministry of New and Renewable Energy (MNRE).

The project focuses on Demand Response Driven Energy Advancement (DREAMS). It leverages digital technology and social sciences to showcase the potential of intelligent and automated load management through Demand Response (DR). This project will enhance energy access, renewable energy penetration and energy efficiency for consumers and energy utilities.

The learnings, bottlenecks and results from the project will create pathways for Utilities and policymakers for wide-scale implementation of Demand Response programmes pan India.



Representatives from RICH, BSES Yamuna Power Limited (BYPL), BSES Rajdhani Power Limited (BRPL), Noida Power Company Limited (NPCL) and Hans Jacob Frydenlund, Norwegian Ambassador to India and Shri. Dinesh Jagdale, Joint Secretary of the Ministry of New and Renewable Energy (MNRE)

KisanMitr

The project aims to enhance Indian farmers' self-reliance through actionable insights and recommendations derived from diverse government data sources. By leveraging data analytics, the project provides personalized recommendations on crop selection, land management, and resource utilization to improve productivity, reduce risks, and enhance farmers' livelihoods. Collaborating with government agencies and stakeholders, the project uses high-quality data and effective analytical models to transform Indian agriculture and enable data-driven decision-making for greater self-reliance.

Research and Innovation Circle of Hyderabad (RICH)

Key insights/Contribution – RICH

- KisanMitr currently has 440 Agri technologies on the portal
- Benefitting farmers with market access, link-up with FPOs, access to information related to agricultural technologies and the latest innovations

Ecosystem Strengthening

Start-up India Seed Fund Scheme

One of the key programmes under the Startup India umbrella is the Startup India Seed Fund Scheme (SISFS). The Scheme provides financial assistance to startups for proof of concept, prototype development, product trials, market-entry, and commercialisation. This helps them move on to the next level, where they can raise investments from angel investors or venture capitalists or seek loans from banks or financial institutions.

Key highlights: Up to Rs. 20 lakhs is available in the form of a grant for validation of proof of concept, prototype development, and product trials and, up to Rs. 50 lakhs of investment is available for market entry, commercialisation, and scaling-up.

The funds get distributed to start-ups through incubators recognised by the government. Research and Innovation Circle of Hyderabad is one such chosen incubator. DROBOTS is the first beneficiary of the SISFS through RICH.



RICH CEO, Rashmi Pimpale with her team and DROBOTS' team

Mission 10X

Mission 10X is a collaborative initiative of the Telangana Incubators and Accelerators group to support early revenue stage start-ups by providing market access, corporate connects, and funding opportunities for scale-up. For over 3-months, startups have received guidance on market access strategy from the resident mentors Dr. Ambuj Chaturvedi and Mr. Bhanu Prakash Reddy Varla through the cohort.

Startups pitched to leaders from the VC firms and Corporates today as part of the demo day organised by Telangana State Innovation Cell (TSIC), Research and Innovation Circle of Hyderabad (RICH), T-Hub in association with IKP Knowledge Park, CIE IIIT Hyderabad and Atal Incubation Centre – CCMB



Graduated start-ups along with programme mentors, VC firms and partners

Partnerships: MoUs with various entities



MoU with Social Alpha



MoU with Indian Centre for Social Transformation (CST)

Research and Innovation Circle of Hyderabad (RICH)



MoU with Malla Reddy Health City



MoU with National Institute for Micro, Small, and Medium Enterprises (NI-MSME)



MoU with Lepra Society



MoU with St. Pauls College of Pharmacy



MoU with Kauvery Hospitals



MoU with Samunnati

Telangana Industrial Health Clinic Ltd. (TIHCL)

<http://tihcl.telangana.gov.in/>



Telangana Industrial Health Clinic Ltd (TIHCL), an innovative institution was promoted by Government of Telangana in the year 2017 to provide holistic help to the stressed Micro and Small enterprises in Manufacturing space (MSEs) suffering from various problems, particularly in the areas of inadequate financial support, financial stress, and incipient sickness. Its long-term goal is to improve the ecosystem surrounding this segment of the industry so that the incidence of stress and sickness can be brought down over a period of time. The Company is registered as a Non-Banking Finance Company (NBFC) with RBI. TIHCL adopted new approaches in identifying and evaluating stressed Enterprises in the State.

Key Activities during FY 2022-23

- TIHCL continued their efforts in Doorstep engagement with the Micro and Small entrepreneurs who are facing stress at the industrial clusters, with a view to enhancing their involvement such that adequate help can be provided to them. This engagement intends to resolve the issues, financial or non-financial, faced by the businesses at the ground level
- TIHCL participated in an Outreach Program conducted by DIC, Nirmal, wherein 150 promoters participated
- TIHCL is engaged with Industrial Associations and IALAs for identifying the needy MSEs in Telangana
- TIHCL along with the Center for Economic Social Studies (CESS) conducted a study on the health of the enterprises and collected information of 380 micro and small units in Cherlapally Industrial Park, analyzed the reasons for sickness / stress and guided the entrepreneurs to come out of the same
- TIHCL has opened their operations for new micro and small enterprises. TIHCL shall provide financial assistance for new units after evaluation of proposals
- TIHCL has entered into an MoU with consulting agency Cruz Management to collaborate on the development of innovative solutions to address challenges faced by MSEs

- As per G.O. Rt. No.78 dated 14.05.2019, any request for release of pending incentives, under T-IDEA Scheme, on priority basis to Micro and Small Manufacturing Entrepreneurs shall be routed through TIHCL. Accordingly, up to March 2023, TIHCL has handled 488 Priority Release cases and submitted views / observations to the Government. This has enabled these MSE units, which are under stress, to receive the sanctioned Subsidy / Incentives on priority and to come out of the stress conditions
- Up to 31st March 2023, TIHCL has received 550 enquiries, out of which 57 units were funded amounting to Rs.776.10 Lakh and many other enquiries were resolved without financial intervention



TIHCL entered into an MoU with Cruz management on development of innovative solutions for MSMEs



TIHCL participated in outreach program at DIC, Nirmal district

Digital Employment Exchange of Telangana (DEET)

<https://www.tsdeet.com/>



Digital Employment Exchange of Telangana (DEET) is an AI & ML driven skill training, job search recruitment platform connecting job seekers, job providers and skill providers through a mobile app and web portal. It is a singular medium for the government to reach out to young citizens and help them find the right job opportunity, through a technology that is most popular amongst them.

DEET has been able to support skilled, semi-skilled and unskilled workforce in tier-1, tier-2 and tier-3 cities along with creating various awareness campaigns for college students, workforce and industry associations. DEET platform is enabling every individual who has the intent to explore skill programs and opportunities and the platform is available in more than 8+ regional languages such as Telugu, Hindi, Tamil, Kannada, Urdu, Oriya, Gujarati and English.

Activities in FY 2022-2023

DEET Skill Development Courses

DEET partnered with various public and private organizations like National Skill Training Institute (NSTI), NASSCOM, ICICI Foundation, TASK, Society

for Employment Promotion & Training in Twin Cities (SETWIN), State Council of Educational Research (SCERT), Telangana Skill Development for Nurses (TSDN), Telangana State Society for Training and Employment Promotion (TSSTEP) and many more. Aggregated more than 580+ courses on the platform. These courses are visible to all the workforce to understand the offerings and share their initial interest.

DEET Awareness Programs (Career Guidance, Resume Building and Job Prep)

The DEET team Conducted webinars and seminars in topics like career guidance, resume building, interview preparation in all the Polytechnic Colleges, ITI's, Government Degree Colleges across Telangana, with help from Education Department (CCETS) and Technical Education. More than 50+ sessions were conducted this year, along with regular job fairs. In these awareness programs, more than 6500+ students participated across Telangana.

DEET Job Fairs

The DEET team conducted 3 Job Fairs with an aim to provide instant job opportunities for the job seekers in

Digital Employment Exchange of Telangana (DEET)

the Telangana region. The job fairs were conducted in:

- Kranthi Degree College
- Vivekananda Degree College
- Rishi UBR PG College for Women

With more than 100+ participating companies, DEET Job Fairs received 4500+ job applications to attend the fairs, 2300+ interviews were scheduled with 750+ candidates being shortlisted and hired.

Partnerships & Collaborations

- T-Hub: To provide job opportunities for startups and entrepreneurs. Connected startups and entrepreneurs with skilled professionals through the DEET platform. Provided startups with access to a large pool of talented candidates
- 91Springboard: To offer job opportunities for freelancers and independent professionals. Provided a platform for freelancers to showcase their skills and connect with potential clients. Offered job opportunities for professionals in various fields including design, development and marketing
- Co-Work Zone: To offer job opportunities for professionals working in shared workspaces. Connected professionals with employers in various industries including tech, finance, marketing, and more. Provided access to a diverse pool of candidates for employers looking to hire skilled professionals
- ICICI Foundation: To display all the courses offered by ICICI Foundation to all the users of DEET
- SETWIN: To display all the courses offered by SETWIN to all the users of DEET
- FTCCI: To offer access to job seekers for training programs. This partnership provides learning content for self-paced training of industry-leading courses to registered job seekers associated with FTCCI and also companies' access to DEET to provide them with the right talent and fulfill demand

DEET - Application Updates

- **DEET - Multilanguage Job Search Portal**

DEET platform is available in more than 8+ languages currently which include English, Telugu, Hindi, Tamil, Urdu, Kannada, Oriya and Gujarati.

- **DEET - iOS App**

DEET platform is now available for users and employers on iOS (App Store) platform.

Important Statistics from FY 2022-23

Vacancies Generated	249,424
Jobseekers Registered	4455
Companies Registered	131
Newspaper & Online Article Publications	300+
Job Fair Conducted	3
Companies Participated	100+
Job Seekers Registered	4500+
Interviews Attended	2500+
Shortlisted & Hired	900+
Upcoming Job Fair for Next Year	12+



Telangana Social Impact Group (T-SIG)



Telangana Social Impact Group (T-SIG), the official CSR / Corporate Social Responsibility cell of the Telangana Government is a platform for Corporates, NGOs and Government Bodies to collaborate on CSR activities. Established in 2018, T-SIG, a pro-bono entity, aims to be a conduit between Corporate India, Government Departments and NGOs to accelerate the pace of CSR development in the State.

Other objectives include

- Increase CSR Collaboration between Government departments and Corporates
- Organise Round Table Events with a focus on aspirational districts
- Increase branding and visibility of T-SIG in the eco-system
- Increase Corporate volunteering opportunities
- Sustain/Enhance existing Corporate and NGO relationships

The past 5 years of T-SIG's existence has seen an increase in CSR fund deployment in alignment with the charters of various Corporates. This is also in pursuance of the UN's 17 Sustainable Development Goals (SDGs). This includes making in-roads across the Corporate network by liaising with various Industry bodies, organising Round Tables to increase participation on various thematic areas, creating repositories of NGO proposals and identifying and assessing CSR spends of Corporates in Telangana. There was also a COVID-19 Warriors event that was organised in November 2021 that felicitated and recognised more than 1000 entities and individuals for going above and beyond to help humanity during the pandemic.

2022-23 saw CSR impact worth Rs. 2.62 Crs. across areas such as health, education, digital infrastructure and the environment. There were a number of successful CSR collaborations that benefitted various Government departments in 2022-23. Some of them are:

UDAAN: Migrant Labour Project – This project aims at revitalizing the migrant labourer (brick kiln) community in Ibrahimpatnam and Sangareddy districts thereby enabling their holistic well-being on parameters such

as health and nutrition, children's education, equitable wages and better living conditions.

This project has already positively impacted nearly 10,000 labourers (including 1100+ children) in FY 2022-23. Six Government departments are working together to make this happen: 1) Education 2) CHF:W: Commissionerate of Health and Family Welfare 3) WDCW: Women Development and Child Welfare 4) Labour 5) Civil Supplies 6) Law and Order: Police. The implementation partner is Aide Et Action.

Sponsors: Raghu Vamshi Group, Ficosa, Oppo



Telangana Social Impact Group (T-SIG)

Health Department - Two laparoscopic machines and six vacuum pumps were installed in Siddipet General Hospital and Gajwel Area Hospital in March 2022.

Sponsor: Electronic Corporation of India (ECIL)



Collegiate and Technical Education (CTE) Department - A Corporate learning session on 'Acing an Interview' was held in May 2022 that benefitted more than 1000 students.

Sponsor: Providence Health and Services



Tribal Girls and Boys School (TSWREIS) - Digital Infrastructure (laptops, routers, projectors, audio speakers) were installed in 2 Tribal schools in Secunderabad in July 2022 and March 2023 to enhance the learning experience of the 400+ students.

Sponsor: Solera / Smart Drive India Pvt Ltd.



Telangana Social Impact Group (T-SIG)



Forest Department - 2000 saplings have been planted over 5 acres in Chilkur in November 2022. An MoU was signed for 3 years. Employees were present at the sapling plantation programme.

Sponsor: Sai Life Sciences



Two Round Table Meetings with more than 60 Corporates that participated were organized on:

- 'Incorporating Diversity & Inclusion in Indian CSR projects' in November 2022
- 'Environmental Protection and Climate Action' in February 2023



Cleft Surgeries in Mulugu District – Through Smile Train (NGO), cleft surgeries were carried out for children in January 2023.



Industry Events



Industry Awards 2022

The Government of Telangana along with TS GlobalLinker, announced winners of the 'Industry Awards 2022' at the Annual Meeting on Beyond India@75 held by CII. Introduced in 2017, the esteemed 'Telangana State Industry Awards' is a statewide competition that recognizes and rewards exceptional achievements made by Telangana based businesses, covering both large & small organizations. The chief guest Mr. K. T. Rama Rao, Hon'ble Minister for Industries felicitated the 28 winners.



CII Defence Conclave

CII Telangana organized its Sixth edition of Defence Conclave with the theme 'Aatmanirbharta in Defence Manufacturing – Modernisation through Indigenisation' on 17 November 2022 in Hyderabad. The Conclave discussed, deliberated and devised measures to address the challenges faced by the Defence sector in its pursuit of self-reliance (aatmanirbharta) and the enhanced role of the private sector in meeting these objectives leveraging modern technologies. The Conclave was also addressed by other eminent speakers and was well attended by the industry members, govt. and PSUs.



FTCCI Excellence Awards 2021

The Federation of Telangana Chambers of Commerce and Industry organized Presentation of

FTCCI Excellence Awards-2021 on 4th July, at HICC, Hyderabad. Sri Gowra Srinivas, Chairman, FTCCI Excellence Awards Committee said that the Awards are instituted for recognizing outstanding contributions/ achievements in economic and social areas to promote corporate and individual initiatives. FTCCI received over 150 nominations for the award and will be bringing out a special Coffee Table Book with write up on the Award Winners focusing on their outstanding achievement, future plans and message to the society. Mr. K. T. Rama Rao said that Peace of doing business is more important, for investors, than the Ease of Doing Business (EoDB) levels of a State, and Telangana ranks high on that count too.



CII MAN'EXE 2022

Confederation of Indian Industry in partnership with Government of Telangana organized the 18th edition of its flagship Conference on Manufacturing Excellence, Man'Exe-2022 with the theme "Role of Leadership in Digital Manufacturing Excellence" on 18 November 2022 in Hyderabad. The Man'Exe-2022' conference's Inaugural Session was addressed by industry leaders from manufacturing sector in Telangana.



FICCI – Fireside chat with legal luminaries on ADR for EoDB

FICCI organized a Fireside Chat session with Legal Luminaries on 'Importance of Alternate Dispute Resolution (ADR) in terms of Ease of Doing Business (EoDB)' along with IAMC on August 20 at Hyderabad.

Industry Events

The session was attended by industry captains from Telangana as well as legal practitioners in the ADR space. Speaking on the occasion, former Supreme Court Judge, Hon'ble Mr. Justice L Nageshwara Rao said that foreign investments will increase if there is confidence that the dispute will be resolved quickly. Institutional arbitration must be promoted to avoid delays and to make arbitration affordable."



FICCI Training Workshop on Plastic Packaging

The Ministry of Environment, Forests and Climate Change (MoEFCC), GOI, and Central Pollution Control Board (CPCB) along with Federation of Indian Chambers of Commerce and Industry (FICCI), GIZ and UNEP organised a "Training Workshop for Registration on Centralised Extended Producers Responsibility (EPR) Portal for Plastic Packaging" on 13th September 2022 in Hyderabad in a hybrid mode. The objective of the training workshop was to provide an overview of guidelines for extended producer responsibility on plastic packaging, briefing PIBOs and PWPBs on filling up the online registration form. The training session was attended by 75 participants in-person and around 150 participants on virtual mode.



FICCI Seminar on Emerging Business & Financial Opportunities for Exporters

Federation of Indian Chambers of Commerce and Industry (FICCI) in association with FTCCI and SBI organized a seminar on "Emerging Business & Financial Opportunities for Exporters" on 14th September 2022 in Hyderabad. The objective of the seminar was to brief SME exporters on exporting avenues, government's export policies, financial support for exporters and to create a platform for exporters to directly interact with senior bankers and experts to access the funding opportunity available for supporting and expanding their businesses. The seminar was attended by 250 participants across the exporter community.



FTCCI Delegation to Thailand

A 15+ trade delegation visit was organized by Thai Trade Center, Chennai, Department of International Trade Promotion (DITP), Ministry of Commerce, Thailand in collaboration with Federation of Telangana Chambers of Commerce and Industry (FTCCI). This trade mission facilitated by DITP enabled Telangana corporate to interact with Thai trade bodies and have B2B meetings with over 40 exporters to source raw materials, exchange, and explore trade and investment opportunities in Thailand and to share details of opportunities present in the state of Telangana. During the visit, FTCCI signed MoUs to promote trade and investments, invite startups, and follow up on the proposed JVs in furniture, agriculture and food processing sector.



CII MSME Summit 2022

CII Telangana organized the 5th edition of annual event – MSME Summit with the theme 'Empowering MSMEs towards Sustainable Future' on 29 November 2022 in Hyderabad. The objective of the Summit was to bring together eminent experts and professionals from the Industry and Government on a common platform to share their visions towards the growth of MSME; to enhance their capacity building measures; insights on Fund raising for MSMEs – New Age Options; create awareness on the various new schemes under the Government of India's (GOI) industry policies and deliberate on the Innovation and Mantra for sustainable business.

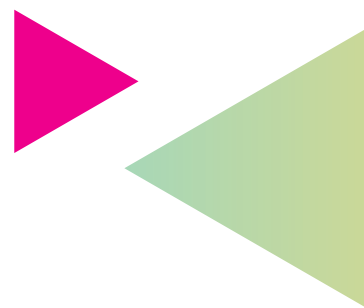


Awards and Recognition



Telangana received award for Best State in Ease of Doing Business (EoDB)

Telangana has been recognized as the State with the best Ease of Doing Business (EoDB) reforms and best E-Governance initiatives by the Economic Times. Hon'ble Minister Mr. K. T. Rama Rao and Principal Secretary Dr. Jayesh Ranjan received the award during the third edition of DigiTech Conclave 2022.



Mission Bhagiratha bags National Award

Telangana received the First Prize for providing adequate and potable water supply on regular basis to rural households under Mission Bhagiratha in 'Regularity' category by Government of India. Mission Bhagiratha team comprising of E-in-C Krupakar Reddy and other senior officers received the Award from the Union Jal Shakti Minister Gajendra Singh Shekhawat in New Delhi on 2nd October 2022 as part of Gandhi Jayanti 'Swachh Bharat Divas' celebrations

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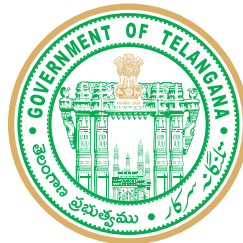
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