



Progressive Haryana: Steady Growth Strides into the Future

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Progressive Haryana: Steady Growth Strides into the Future



Dr D K Aggarwal
President, PHDCCI

Haryana is an agrarian state and one of the key contributors to the national food basket. The state enjoys top position in the production of basmati rice. The Government of Haryana has been regularly endeavoring to give a fillip to the agriculture sector by undertaking various initiatives and schemes for giving an impetus to agriculture and allied sectors in the state. The state's vision 2030 is appreciable as it focuses on modernization of irrigation systems, persuasion of crop diversification, timely availability of quality feedstock at subsidized rates and introduction of modern technologies, among others. Haryana has emerged as one of the most industrialized States in the country over the years. Haryana has transformed and emerged as a veritable hub of knowledge and a vibrant and fast growing industrial powerhouse. Haryana is strategically located in the heart of India and surrounds the National Capital Delhi on three sides.



Shri Sanjay Aggarwal
Senior Vice President
PHDCCI

The state of Haryana has made a special place for itself in the agriculture sector of India. The state is self sufficient in food production and is the second largest contributor of food grains to the central pool. Haryana is blessed with diverse cropping pattern and agro-ecology. The state holds tremendous potential for the agro-based and food processing industries. The State has made impressive strides over the years to make a special place for itself in the fields of automobiles, electronic hardware, engineering, hi-technology industries, Information Technology, leather and textiles. The State has been a leader in manufacturing of a number of products like cars, footwear, scientific instruments, tractors, two-wheelers, etc.



Shri Pradeep Multani
Vice President,
PHDCCI

Haryana has witnessed a significant growth path over the years. The state is being proudly known as the "Bread Basket of India". It has been in the forefront in terms of the adoption of latest technologies in agriculture and is also counted as one of the leading states for Agriculture production in the country. The state is consistently encouraging farmers to adopt latest farm technology to increase the farm sector output. MSMEs sector of the state has potential to drive growth of manufacturing sector and boost employment in the state. The state has presence of many manufacturing clusters which has boosted industries such as IT, textiles, food and handlooms. It also has large concentration of MSMEs in various segments providing employment to unskilled, semi-skilled and skilled workforce.



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Shri Mohit Jain
Chairman, Haryana State
Chapter, PHDCCI

Haryana has a large base of skilled labour, making it an ideal destination for knowledge based and manufacturing sectors. Designing and developing services led growth strategy focusing on health, education, IT, tourism, logistics, bulk courier services, knowledge based, sports, among others would bolster the growth of services sector of the state. Encouraging new business ventures in the services sector by the state through easy availability of loans and further simplification of regulatory process would bolster the growth of the sector in the coming times. The State has a huge potential for establishment of agro-based and food processing industry. Hence, investment in agriculture related infrastructure and strengthening supply chains are crucial to push economic growth into higher trajectory.



Shri Ashutosh Jain
Co-Chairman, Haryana State
Chapter PHDCCI

Haryana today has emerged as one of the most industrialized States in the country. The State has made impressive strides over the years to carve out a niche for itself in the fields of automobiles, electronic hardware, engineering, hi-technology industries, Information Technology, leather, and textiles. The State has been a leader in manufacture of a number of products like cars, footwear, scientific instruments, two-wheelers, tractors, etc. The state offers a wide range of incentives for boosting growth of various sectors of the economy. Going ahead, participation of private sector should be highly encouraged and strengthened in the state through public private partnerships (PPP) for further promoting the growth of the state in the coming times.



Shri Saurabh Sanyal
Secretary General
PHDCCI

Haryana is a very progressive state in the adoption of policy environment and one of the leading states in the growth and productivity levels of agricultural produce. The agri-infrastructure linkages such as cold chain, storage and warehouses and road connectivity are important for the growth and productivity of the agriculture sector and to reduce the wastages. Therefore, adoption of state of the art technology plays a very important role and in this regard state government of Haryana has undertaken various reforms for achieving fruitful outcomes and welfare creation for the masses at the ground level.



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Executive Summary

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

The GSDP Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 437145 crores in FY2015 to about Rs. 831610 crores in FY2020. The real GSDP of the state has grown at 8.7% (average) during the period FY2015 to FY2020. Tertiary sector contributes a significant share of around 50% in the GSVA of the state followed by the Secondary sector and primary sector at 31% and 19% respectively during FY2020. The NSDP at current prices of the Haryana has increased significantly from Rs 588274 crore in FY2018 to around Rs 755790 crore in FY2020.

Haryana is an agricultural state with majority of the state's total geographical area under cultivation. The state has diverse agro-ecology and cropping pattern. The state enjoys first position in the production of basmati rice and productivity in pearl millet and rapeseed & mustard. Major crops grown in the state include rice, wheat, pulses, cotton, sugarcane, pearl millet and rapeseed and mustard. The state has done very well in the field of information technology with the emergence of Gurugram as the hub of IT Industry. The state is further enhancing its financial infrastructure and covering large population under financial inclusion, through innovative schemes and measures.

Haryana offers a wide range of fiscal and policy incentives for boosting growth of various sectors of the economy. The state has made impressive strides over the years in industrialization. The key industries of the state are agro-based industry, automotive, bicycles, IT/ITeS, oil refining, sanitary ware, textiles, pharmaceuticals & chemical industry, defence manufacturing and clean energy, among others. Haryana has continuously focused on providing better and modernised infrastructural facilities in the state. In order to build a strong infrastructure base in the state, participation of private sector is highly encouraged by the state government through public private partnerships (PPP).

The growing severity of the impact caused by the widespread pandemic COVID-19, on our economy, its people and the Nation as a whole is a matter of deep concern. As on 27th May 2020, the state has 1381 active cases of COVID-19, 838 have been cured and 18 deaths. The Government of Haryana has announced setting up of various facilitation windows to support and combat with pandemic COVID-19 especially for its people, trade and industry. Going ahead, the key promising sectors of the Haryana that have an immense potential to bolster the trade and businesses scenario in the state in the coming times in the post COVID-19 scenario are



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agriculture & allied activities, automotives, IT & ITeS, textiles, real estate, pharmaceuticals & chemical industry, defence manufacturing and clean energy, among others.

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

Haryana has a large base of skilled labour, making it an ideal destination for knowledge based and manufacturing sectors. Given this, top priority to reforms in the manufacturing sector would facilitate its growth and generate significant employment opportunities in the state. Designing and developing services led growth strategy focusing on health, education, IT, tourism, logistics, bulk courier services, knowledge based and non-polluting services, sports, among others would bolster the growth of service sector of the state. Encouraging new business ventures in the services sector by the state through easy availability of loans and further simplification of regulatory process would bolster the growth of service sector of the state.

Exports play a vital role in the economic growth of Haryana as the state's performance on the export front has been excellent. The major export items from the state are software, handloom products, scientific instruments, garments, automobiles and automotive components, electrical appliances, rice, pickles, etc. The agro-based industry of Haryana still holds a strong potential for exports. Further, providing more facilities/incentives to the exporting units would increase exports from the state. The growth prospects of the state are very bright keeping in view the dynamic and vibrant growth provoking sectors of the state economy supported with strong policy environment. Going ahead, keeping in view the daunting impact of pandemic COVID-19 on the state economy, real GSDP of Haryana is projected to grow at a rate of 4% for FY2021. Further, with continuous reform measures by the State Government including promotion of ease of doing business, boosting industrial production, investments and low base effect, real GSDP of Haryana is estimated to grow at 9.3% for FY2022.

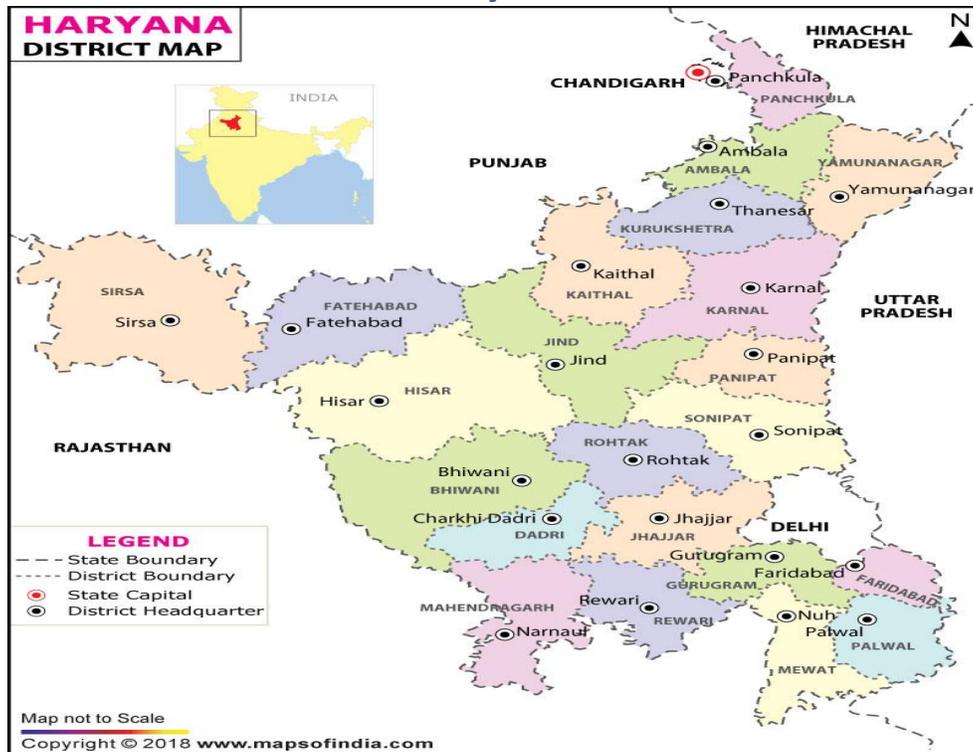
In a nutshell, focus on improving quality of infrastructure, enhancing agriculture productivity, addressing inflexibilities in labour markets, reforming manufacturing sector to bolster industrialization, would enhance its growth trajectory. Further, improvement in the quality of education, attraction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



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Haryana



Haryana is a state known for its rich cultural and heritage strengths. The state is acknowledged for its famous legends and vedic references. The state holds strong footprints in the great epic of Mahabharata. The state is a land where saint Ved Vyas wrote Mahabharata which is one of the famous Indian epics. Haryana is a land locked state located in the northern part of India. The state shares its boundary with Uttar Pradesh in the East, Punjab in the West, Himachal Pradesh in the North and Rajasthan in the South. The state also surrounds national capital of Delhi from three sides.

It is one of the prosperous states of India endowed with rich natural and agricultural resources. Haryana is mainly an agricultural state with abundant fertile land. The agriculture sector of the state has benefited by the Green Revolution which took place in the state. Further, the state is home to many species of flora and fauna. Haryana has witnessed fast pace of industrial development over the years. The state is famous for its handicrafts and handlooms which are exported to various parts of the world. Phulkari embroidery is one of the prominent art work of Haryana.



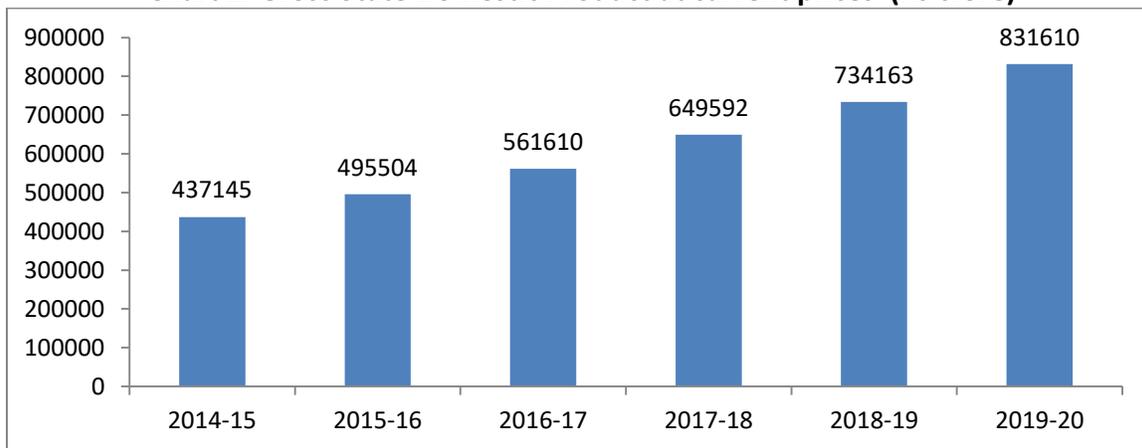
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1. Macroeconomic Environment of Haryana

The GSDP Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 437145 crores in FY2015 to about Rs. 831610 crores in FY2020. The real GSDP of the state has grown at 8.7% (average) during the period FY2015 to FY2020.

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



Source: PHD Research Bureau, compiled from Ministry of Statistics and Programme Implementation, Government of India.

Tertiary sector contributes a significant share of around 50% in the GSVA of the state followed by the Secondary sector and primary sector at 31% and 19% respectively during FY2020. The NSDP at current prices of the Haryana has increased significantly from Rs 588274 crore in FY2018 to around Rs 755790 crore in FY2020.

Table 1. Gross State Domestic Product and its Composition

| Components | FY2018 | FY2019 | FY2020 |
|---|--------|--------|--------|
| GSDP at current prices (Rs. crore) | 649592 | 734163 | 831610 |
| NSDP at current prices (Rs. crore) | 588274 | 666075 | 755790 |
| Economic Growth % (GSDP at constant prices) | 8.2 | 7.5 | 7.7 |
| Sectorial Contribution in GSVA at current prices (%) | | | |
| Primary | 19.28% | 18.95% | 18.90% |
| Secondary | 31.46% | 31.11% | 30.66% |
| Tertiary | 49.26% | 49.94% | 50.44% |

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



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Table 2. Summary of socio-economic indicators

| | |
|--|--|
| State Capital | Chandigarh |
| Hon'ble Governor of Haryana | Shri Satyadeo Narain Arya |
| Hon'ble Chief Minister of Haryana | Shri Manohar Lal Khattar |
| Geographical Area (Sq. km)# | 44,212 |
| Population (Census 2011) | 25,351,462 |
| Population Density (persons/Sq. Km) Census 2011 | 573 |
| Male population (Census 2011) | 13,494,734 |
| Female population (Census 2011) | 11,856,728 |
| No. of districts | 22 |
| GSDP at Current Prices (FY2020) | Rs. 831610 crores |
| Growth of GSDP at Current Prices (FY2020) | 13.3% |
| NSDP at Current Prices (FY2020) | Rs. 755790crores |
| Growth of NSDP at Current Prices (FY2020) | 13.5% |
| Per Capita NSDP at Current Prices (FY2020) | Rs. 264207 |
| Growth of Per Capita NSDP at Current Prices (FY2020) | 11.8% |
| Population below poverty line (%)^ | 11.2% |
| National Highway length (Kms) | 2741 |
| Literacy Rate (2011 Census) | 75.6% |
| Sex Ratio (2011 Census) | 879 female per 1000 males |
| Key Industries | Agro-Based Industry, Automotive, Bicycles, Biotechnology And Petrochemicals, IT/ITesS, Oil Refining, Real Estate & Construction Sanitary Ware, Scientific Instruments, Textiles, Tourism, |
| Main Districts of the State | Ambala, Faridabad, Gurugram, Karnal, Kurukshetra & Panipat |
| Prominent tourist destinations | Karna Lake (Karnal), Loco Shed (Rewari), Mata Mansa Devi, Panchkula, Morni Hills (Panchkula), Nada Sahib Gurudwara (Panchkula), Nahar Singh Mahal (Faridabad), Pinjore (Panchkula), Yadavindra Garden, among others. |

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

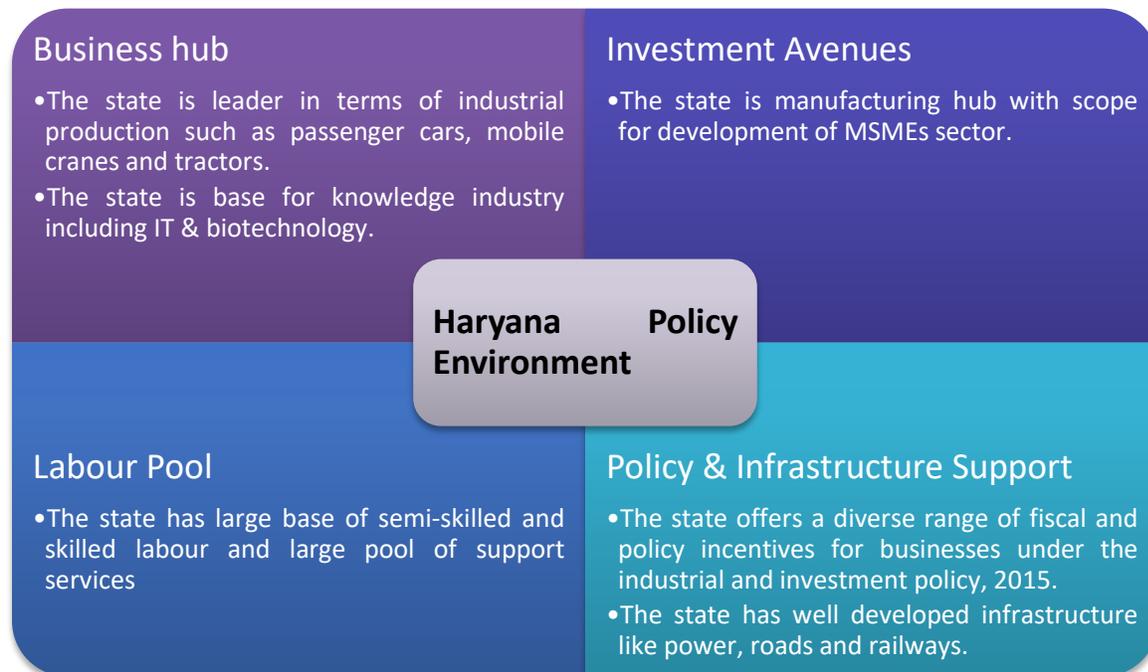


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2. Economic and Business Policy Environment in Haryana

The state ranks 3rd in ease of doing business in India. Haryana is one of India's largest automobile hubs and has also emerged as a base for the knowledge industry, including IT and biotechnology. The entire state falls in the influence zone of two industrial corridors, namely, Delhi Mumbai Industrial Corridor (DMIC) and Amritsar Kolkata Industrial Corridor (AKIC). Thirteen districts of Haryana are in the National Capital Region (NCR), which is a prominent trade and consumption center. Highest concentration of BPO workforce in the world Haryana ranks 17th in terms of population in India, home to around 2% of the country's total population. The total population of Haryana is 25.4 million, with Faridabad as the most populated district.



2.1 Industrial investments

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

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

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

The share of Haryana in India's industrial investment proposals has shown a fluctuating trend over the years. The average share of Haryana in country's industrial investment proposals stands at around 0.73% during 2014 to 2019 (December).

Table 3: Industrial Investment Proposals in Haryana vis-à-vis India (Rs Crore)

| Year | Haryana | India | Share of Haryana in India's Total industrial investment proposal (%) |
|----------------------------|---------|--------|--|
| 2014 | 2681 | 405027 | 0.7 |
| 2015 | 2872 | 311031 | 0.9 |
| 2016 | 2152 | 414086 | 0.5 |
| 2017 | 2469 | 395296 | 0.6 |
| 2018 | 2493 | 458652 | 0.5 |
| 2019 (December) | 8283 | 678852 | 1.2 |

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

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



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2.2 Haryana Industrial and Investment Promotion Policy 2015

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

Table 4: Summary of Haryana Industrial and Investment Promotion Policy 2015

| | |
|---------------------------------------|--|
| <p>Vision</p> | <p>To position Haryana as a pre-eminent Investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation & technology, and skill development for nurturing entrepreneurship and generating employment opportunities</p> |
| <p>Mission</p> | <ul style="list-style-type: none"> • Reposition Haryana as a “Preferred Destination” for doing business; • Facilitate State GDP growth rate in excess of 8%; • Employment generation for 4 lakh persons; • Investments into the State of Rs.1 lakh crore; • Increase contribution of secondary sector in the State GDP from 27% to 32% in tandem with the Government of India’s National Manufacturing Policy and ‘Make in India’ initiative; • Promote balanced regional development through geographical dispersal of industry; • Increasing the competitiveness of the MSMEs through cluster development and adoption of “Zero Defect Zero Effect” manufacturing practices |
| <p>Strategic Interventions</p> | <ul style="list-style-type: none"> • Creating a pool of inexpensive land bank and support infrastructure for the Industry and Investor Facilitation; • Putting in place a Business friendly regulatory system which supports Ease of Doing Business; • Revitalizing the Industrialization in the State through specific interventions. • Promoting labour Intensive and employment generating industries like Textiles, Agro processing etc.; • Generating inclusive economic development through geographical dispersal of Industry; • Bringing in labour reforms to match the aspirations of the industry and the labour; • Initiating skill development programs in collaboration with the Industry; • Leveraging Central Government Schemes for building and upgrading |



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| | |
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| | <p>infrastructure;</p> <ul style="list-style-type: none"> • Encouraging adoption of green, clean energy business practices and technologies; |
| Other Highlights | <ul style="list-style-type: none"> • Thrust Areas have been identified based on competitive strength/advantages of the State - geographical location, available resources and skill-base, raw material availability, existing manufacturing practices and expertise, and; growth potential and Sunrise area offering new growth opportunities. • Mega Project/Mother Units – land on lease to projects which support ancillarization or employment generation, use green technologies or use of local raw material, involving Hi-tech manufacturing and requiring lesser space like Electronics etc.; • Industry by Invitation – Fortune 500 companies/large Corporates/MNCs would be invited to set up projects in the State; |
| MSMEs | <ul style="list-style-type: none"> • Leveraging all the Schemes of Ministry of MSMEs - Easier exit mechanism for MSMEs, Mudra Bank for financial support to the MSMEs, etc; • Focus on Cluster development – More clusters planned for Food, Leather, Textile, IT/ITES, Plywood, Metal/utensils etc. • MSME Parks on Panchayat lands – Small sized Plots/Flatted Factories with plug & play facilities on lease basis; • Fiscal Incentives; • Creation of Rs.1,000 crore corpus under CGTMSE for collateral free loans; |
| Environment Related Reforms | <ul style="list-style-type: none"> • Inspections – reduced periodicity, once in 5 years and/or Inspections by exception with prior intimation duly authorized by top Authority – report with 72 hours; • Increased periodicity for approvals – Red (5 years), Amber (10 years) & Green (life time); • Categorization/norms as per CPCB; • Online filing of returns through a single form under all Acts; • Self-certification and third party verifications through private agencies/colleges etc. |
| Other Areas of Focus under Industrial Policy | <ul style="list-style-type: none"> • Labor Reforms • Enhancing Skill Levels & Employability • Promoting Green Initiatives & Technologies • Infrastructure & Industrial Estate/Parks Development • Export Promotion • Estate Management Procedures, among others. |

Source: PHD Research Bureau, Compiled from Industrial Policy of Haryana 2015



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2.3 IT & ESDM Policy 2017

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

Table 5: Highlights of Haryana IT & ESDM Policy 2017

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



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| | projects shall be eligible for Special package of incentives over and above of the standard package for ESDM units shall be considered by the empowered committee on case to case basis, etc. |
|--|---|

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

2.4 Aerospace & Defence Policy 2016

The vision of Aerospace & Defence Policy 2016 of Haryana is to establish Haryana as the country's prominent aerospace & defence manufacturing hub and preferred MRO, FBO destination of the Asian region.

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

The proposed policy objectives are as follows:

- Attract orders for at least 15% of all offset obligations discharged by companies in India by leveraging the existing ancillary base and promoting new MSMEs dedicatedly for A&D sector
- Attract investors to set-up Mega and Ultra-Mega Anchor units and thereby attract 10% by value of the orders in defence industry in India
- Attract investment of over INR 25,000 crores throughout the value-chain
- To create direct employment for 32,000 people by 2020
- To increase the share of industry in GSDP from 27% to 32% by leveraging the A&D sector
- To attract 50% by value of MRO activities of which market size in India is estimated to be around USD 700 million

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

2.5 Haryana Agri Business and Food Processing Policy 2018

Food processing industry plays an important role in the development of Indian economy through the integration and synergy it provides between agriculture and industry, the two pillars of economic prosperity. The growth of food processing sector is essential to meet the twin objective of "inclusive growth" and "food security".

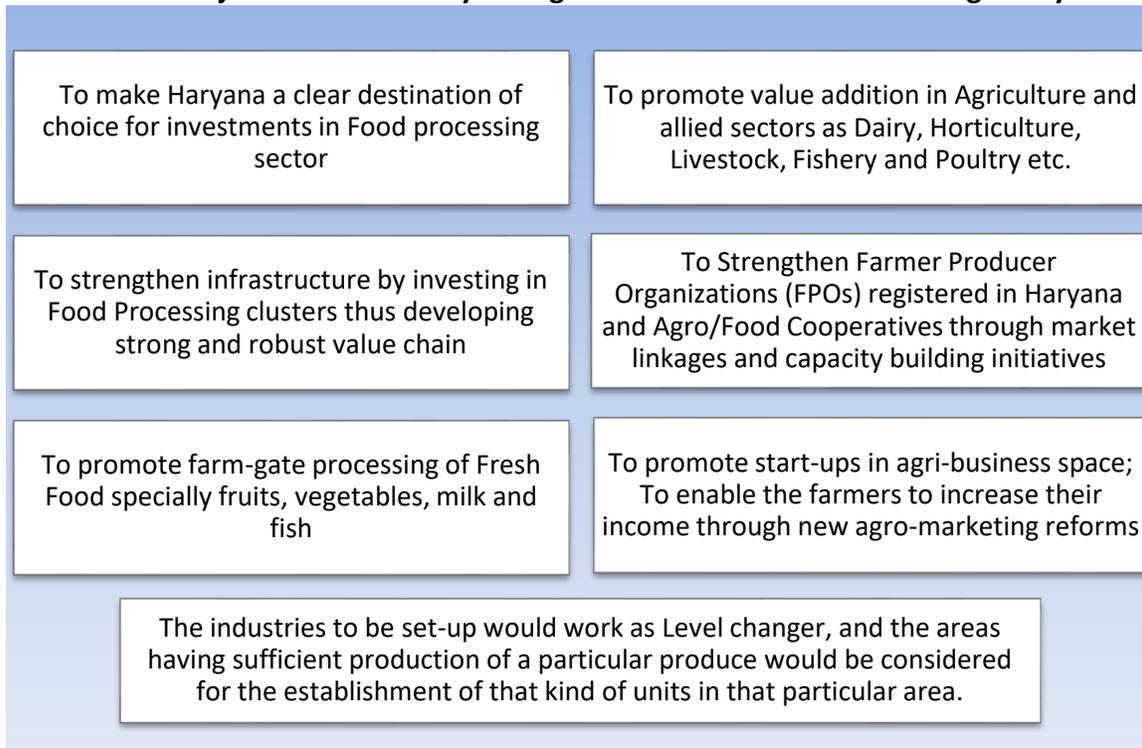


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Haryana Agri-Business and Food Processing Policy 2018 endeavors to give the required impetus to the Food processing industry in the state. Further by establishing efficient forward and backward linkages, it aims to create greater employment opportunities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

Chart 2: Main objectives of the Haryana Agri Business and Food Processing Policy 2018



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

2.6 Entrepreneur and Startup Policy 2017

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



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Chart 3: Summary of Entrepreneur and Startup Policy 2017

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

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

Highlights of the policy:

- Haryana State Electronic Development Corporation Limited (HARTRON) introduced a start-up warehouse on 10,000 sq. ft. of land in Gurugram under the policy.
- The policy also proposed building of sector specific incubation centers which would provide facilities such as common working space, test and demonstration facilities, mediation and network, training and coaching and business support.
- Various incentives are offered to startups/entrepreneurs under the policy. Few of these are interest subsidy, lease rental subsidy and innovation promotion subsidy.
- The government also decided to create a fund of funds to support startups at the stages of seed funding and venture capital.

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- Seed capital of upto US\$ 4,656 shall be provided for validation of idea, prototype development and initial activities to setup the startup. A total of 500 ideas would be supported with seed capital.
- The government would also create a fund of USD 1.5 million dedicated to meet the funding requirement for scalability.
- Policy includes infrastructure augmentation in the form of developing training & plug and play infrastructure, formation of incubation centers and incubation center network and promote cyber security businesses.

2.7 New Integrated Licencing Policy-2016

New Integrated Licencing Policy-2016 came into effect by superseding the New Integrated Licencing Policy-2015 for Residential and Commercial Uses in Hyper/High Potential Zones dated 26.10.2015 to extend the benefits of this policy to the Medium and Low Potential Zones of the State of Haryana.

Few objectives of the New Integrated Licencing Policy-2016 are:

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

Highlights of the policy:

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



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- The department can consider grant of licence for an additional area subsequent to grant of first licence.
- Licences will be granted for the lands falling under the alignment of sector roads designated in the development plans i.e. 30 metre, 45 metre, 60 metre, 75 metre, 90 metre and of any other width designated in development plans and for sites designated for external development works (EDW) identified in development plans/sectoral plans.

2.8 Enterprise Promotion Policy 2015

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

Table 6: Highlights of Enterprise Promotion Policy 2015

| | |
|-------------------------------|---|
| Vision | To position Haryana as a pre-eminent Investment destination and facilitate balanced regional and sustainable development supported by a dynamic governance system, wide scale adoption of innovation & technology, and skill development for nurturing entrepreneurship and generating employment opportunities |
| Mission | <ul style="list-style-type: none"> • Facilitate State GDP growth rate in excess of 8%; • Employment generation for 4 lakh persons; • Investments into the State of Rs.1 lakh crore; • Increase contribution of secondary sector in the State GDP from 27% to 32% in tandem with <ul style="list-style-type: none"> • the Government of India's National Manufacturing Policy and 'Make in India' initiative; • Promote balanced regional development through geographical dispersal of industry; • Increasing the competitiveness of the MSMEs through cluster development and adoption of "Zero Defect Zero Effect" manufacturing practices. |
| Ease of Doing Business | <ul style="list-style-type: none"> • Implementation Mechanism • Project Clearance Mechanism • No Change of Land Use/ Auto – Change of Land Use • Simplified Estate Management Procedures • Service Guarantee/ Deemed Clearance • Integration with e-Biz Portal (Labor & Environmental Reforms) |



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

2.9 MSMEs in Haryana

On the industrial front, Haryana is an emerging manufacturing hub for Indian economy having immense scope for the development of the micro, small and medium enterprises (MSMEs) sector. MSMEs sector of the state has potential to drive growth of manufacturing sector and boost employment in the state. There are 9.7 Lakhs MSMEs in Haryana that constitute 1.5% of



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the MSMEs in all over India. The state has presence of many manufacturing clusters in the cities of Ambala, Panipat, Karnal, Kaithal, Yamunanagar, Sonapat, Rohtak among others which has boosted industries such as IT, textiles, food and handlooms.

| Table 7: Estimated Number of MSMEs (in Lakhs) | | | | |
|---|-------|-------|--------|------------|
| | Micro | Small | Medium | Total MSME |
| Haryana | 9.5 | 0.2 | 0 | 9.7 |
| All India | 630.5 | 3.3 | 0.1 | 633.9 |
| Share of Haryana MSME in All India | 1.5% | 5.1% | 0 | 1.5% |

Source: Compiled by PHD Research Bureau, Annual report of MSMEs 2018-19 (State-wise Distribution Estimated Number of MSME (NSS 73rd Round, Annexure-I))

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

2.10 Ease of Doing Business in Haryana

According to the Business Reform Action Plan (BRAP) rankings for 2017-18, Haryana ranked 3rd in terms of ease of doing business¹. On December 20th, 2018, the Department of Industrial Policy and Promotion (DIPP) announced results of the first ever States' Start-up Ranking 2018 in which Haryana emerged among the 'Aspiring Leaders'.

Table 8: State-wise Business Implementation Reform

| S. NO. | State | Rank | Score (%) |
|--------|----------------|------|-----------|
| 1. | ANDHRA PRADESH | 1 | 98.30 |
| 2. | TELANGANA | 2 | 98.28 |
| 3. | HARYANA | 3 | 98.06 |
| 4. | JHARKHAND | 4 | 98.05 |
| 5. | GUJARAT | 5 | 97.99 |
| 6. | CHHATISGARH | 6 | 97.31 |
| 7. | MADHYA PRADESH | 7 | 97.30 |
| 8. | KARNATAKA | 8 | 96.42 |
| 9. | RAJASTHAN | 9 | 95.70 |
| 10. | WEST BENGAL | 10 | 94.59 |
| 11. | UTTARAKHAND | 11 | 94.24 |
| 12. | UTTAR PRADESH | 12 | 92.89 |
| 13. | MAHARASHTRA | 13 | 92.88 |

¹ Business reform action plan, Department of industrial Policy and Promotion, Ministry of Commerce and Industry, Government of India



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| | | | |
|-----|---------------------------|----|-------|
| 14. | ODISHA | 14 | 92.08 |
| 15. | TAMIL NADU | 15 | 90.68 |
| 16. | HIMACHAL PRADESH | 16 | 87.90 |
| 17. | ASSAM | 17 | 84.75 |
| 18. | BIHAR | 18 | 81.91 |
| 19. | GOA | 19 | 57.34 |
| 20. | PUNJAB | 20 | 54.36 |
| 21. | KERALA | 21 | 44.82 |
| 22. | JAMMU & KASHMIR | 22 | 32.76 |
| 23. | DELHI | 23 | 31.69 |
| 24. | DAMAN & DIU | 24 | 28.69 |
| 25. | TRIPURA | 25 | 22.45 |
| 26. | DADRA NAGAR & HAVELI | 26 | 21.88 |
| 27. | PUDUCHERRY | 27 | 15.65 |
| 28. | NAGALAND | 28 | 14.16 |
| 29. | CHANDIGARH | 29 | 11.54 |
| 30. | MIZORAM | 30 | 3.66 |
| 31. | ANDAMAN & NICOBAR ISLANDS | 31 | 1.25 |
| 32. | MANIPUR | 32 | 0.27 |
| 33. | SIKKIM | 33 | 0.14 |
| 34. | ARUNACHAL PRADESH | 34 | 0.00 |
| 35. | LAKSHADWEEP | 34 | 0.00 |
| 36. | MEGHALAYA | 34 | 0.00 |

Source: PHD Research Bureau compiled from the Department of Industrial Policy and Promotion, Government of India as on 26th May 2020

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

Table 9: Some initiatives for Ease of Doing Business

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



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

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

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3. COVID-19 scenario and relief measures announced in Haryana

The growing severity of the impact caused by the widespread pandemic COVID-19, on our economy, its people and the Nation as a whole is a matter of deep concern. As on date (27th May 2020) the state has 1381 active cases of COVID-19, 838 have been the cured cases and 18 deaths. The Government of Haryana has announced setting up of various facilitation windows to support and combat with pandemic COVID-19. They are as follows:

- COVID-19 (Financial support to unorganised workers); COVID-19 (Haryana movement pass); COVID-19 (Haryana Relief Camp Management System) ; COVID-19 (Sangharsh Senani), among others
- An amount of Rs 35 crore was released as an instalment of subsistence financial assistance to 350621 workers at Rs 1000 per family per week through NPCI (National Payments Corporation of India) directly to the Aadhar linked bank accounts for the construction workers.
- The state had released standard operating procedure (SOP) for maintaining supply of essential goods. The availability of essential goods takes place through small local retail shops, large organized retail stores and e-commerce companies.
- The standard operating procedures are suggested for ensuring smooth availability of essential goods.
- All facilities in the supply chain of essential goods, whether involved in manufacturing, wholesale or retail of such goods through local stores, large brick and mortar stores or e-commerce companies should be allowed to operate, ensuring strict social distancing.
- The retail end of the supply can shall operate only in essential goods as specified in the orders of MHA, They will provide an undertaking to this effect and also allow subsequent audit of their records with a view to ensure compliance.

According to the guidelines of Lockdown 4.0, the industrial establishments in the state of Haryana outside containment zones have been permitted to function with 100% staff such as

- Industries in rural areas
- Industries areas with access control viz. IMT/IA/IDC/SEZs etc.
- e-commerce
- Other industry in urban/municipal areas all with 100% staff.



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4. Post COVID strategy for trade and industry promotion in Haryana

The Haryana government has been adopting various reforms and strategies to attract investors/companies intending to shift their base or set up new manufacturing facility in India. The investors across the world are keen to invest in India and therefore, the state government have been organising several open houses with potential investors through video conferencing/webinars to attract large chunk of investors in the state. The Haryana government has been providing relief measures to ensure quickly setting up manufacturing facilities in any industrial estate of the choice of investors wanting to shift base from other countries.

4.1 Promising sectors of Haryana

In the post covid-19 environment, some of the promising sectors of the Haryana economy that have an immense potential to bolster the trade and businesses scenario in the state in the coming times are as follows :

Table 10: Promising sectors of Haryana

| S.No. | Promising Sector | Sector Description |
|-------|--|--|
| 1 | Agriculture & Allied Activities | <ul style="list-style-type: none"> • Haryana is an agricultural state with nearly 80% of the state’s total geographical area under cultivation. The state has diverse agro-ecology and cropping pattern. • There are mainly three agro-eco regions in the state which have better irrigation facilities and quality infrastructure. Haryana is one of the key contributors to the national food basket. • The state enjoys first position in the production of basmati rice and productivity in pearl millet and rapeseed & mustard. Major crops grown in the state include rice, wheat, pulses, cotton, sugarcane, pearl millet and rapeseed and mustard. • The main horticultural crops of the state having good potential are cauliflower, onion, potato, tomato, chillies, guava and kinnow. The state is well known for Murrah buffaloes which are exported to other states of the country and even abroad. |



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| 2 | Automotives | <ul style="list-style-type: none"> • The state is a preferred destination for auto majors and automobile component manufacturers. • The state produces 2/3rds of passenger cars, 50% of tractors and 60% of the motorcycles manufactured in the country. • Automobiles and auto components exports from the state reached USD 835 million in 2019-20 (till December 2019). |
| 3 | IT & ITeS | <ul style="list-style-type: none"> • The State Government is working extensively in the domain of cyber security. Some of the initiatives are in the pipeline for seamless implementation of the Cyber Security Policy in Haryana: • Hiring of professional agency for providing manpower services for Implementation & Support of Cyber Security Policy. Hiring professional agency for providing cyber security trainings and capacity building services. • The state government has notified following policies for creating an ecosystem to take Haryana on the path of digital revolution: <ul style="list-style-type: none"> ○ IT & ESDM Policy 2017 ○ Entrepreneur & Start up Policy 2017 ○ Communication & Connectivity Infrastructure Policy 2017 ○ Cyber Security Policy 2017 |
| 4 | Textiles | <ul style="list-style-type: none"> • Haryana is the fourth largest producer of cotton in India and contributes around 6% of the country's total production. • Easy availability of raw material provides the state with competitive advantage in the textiles sector, which provides employment to around one million people in Haryana. |



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| | | <ul style="list-style-type: none"> Readymade garments of cotton are one of the major exports of Haryana, with their export reaching US\$ 607 million in FY19 and US\$ 567.37 million in 2019-20 (till December 2019). |
| 5 | Real Estate | <ul style="list-style-type: none"> The state’s real estate market is attractive and it is a preferred automotive hub. Of the total 250 large & medium OEMs (Original Equipment Manufacturers), about 50 are located in Haryana. The state government introduced New Integrated Licensing Policy (NILP) 2015: <ul style="list-style-type: none"> To develop hyper and high potential urban complexes in the state. To allow real estate developers in setting up projects that are less than 100 acres of area |

Source: PHD Research Bureau, compiled from various sources

4.2 Post-COVID Growth Prospects for Promising Sectors in Haryana

Haryana is a well-developed industrial state. It is one of the leading states in terms of industrial production especially in automobile Industrial production, IT sector, Pharmaceuticals & Chemical Industrial production, defence manufacturing and clean energy. Haryana is the third-largest exporter of software and one of the preferred destinations for IT/ITs facilities.

The state enjoys a number of competitive advantages including proximity to NCT of Delhi, favourable law and order situation, conducive policy environment, trained and skilled manpower, responsive administration etc. However, the progress of these Industries has severely been hurt by the COVID-19 crisis.

COVID-19 crisis has made the world economy vulnerable. It has engulfed 215 countries in the world with 5,909,677 affected cases of which 2,944,571 active cases and over 362,102 deaths till date. Each country including India is doing its best to survive the pandemic and control its spread as much as possible. Improving the medical facilities, observing social distancing and country wide lockdown has been the globally accepted practices which are being followed by India too.

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Country is set to lockdown since 25th march 2020 in four phases as of now. First phase of lockdown starting from 25th of March, 2020 to 14th April, 2020 (for 21 days), phase-2 from 15th of April to 3rd of May 2020 (19 days), phase- 3 from 4th of May to 17th May, 2020 (14 days), phase-4 from 18th of May to 31st May 2020 (11 days). During this period almost all the economic activities remain suspend except the essential ones as listed by the government of India. However, as we moved to phase-3 and phase-4 a few relaxations and financial support were released to reduce the lockdown disruption to as least as possible.

However, impacts of country wide lock down are disruptive in nature. Suspension of economic activities dilutes its performance by hitting the consumption side badly leading to low level of production, dilution of earning of millions of businesses, low demand for skilled/ unskilled workers, among others. It exerts a vicious circle of disruption. India is currently going through the same economic conditions. Although initiatives take by the Central government and State Government to support the economy are appreciable and likely to go long way to cure the wounds caused by the pandemic.

The lockdown in India due to pandemic COVID-19 has severely affected the supply chain in the country. It has created a slump in the demand, unwarranted movement of migrant workers to their native places, impacted earnings of several enterprises and business, among others.

To sum up, Haryana is one of the fastest growing states as a favourable destination for stable and profitable investments since the last decade due to the competitive advantages of the state. The state has a proven long term sustainability and growth potential in many growth promising sectors. Most importantly, the state has been taking proactive measures to revive the economy in the post COVID scenario to support the promising industries, encourage MSMEs and taking all possible actions to attract foreign investments. These initiatives of the government would go long way to settle the short lived glitches caused by COVID-19 led lockdown and supply chain disruptions.

Below is the list of key growth promising industries of Haryana focussing on industry wise impacts of COVID-19 and actions so far being taken by the state to revive them.

Table 11: Brief Description of Key Industries in Haryana

| S. No | Name | Description |
|-------|--|--|
| 1 | Agriculture: agro based, Food Processing & allied Industry | Haryana is one of the four largest producers of cotton in the nation. It is the second-largest contributor of food grains to India’s central pool and accounts for more than 60 per cent of the export of Basmati rice in the country. |
| 2 | Automobile Industry | Haryana is a preferred destination for auto majors |



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| | | Industries and auto-component manufacturers. The state is host to many large automotive players. It is one of India's largest automobile hubs and accounts for two thirds of passenger cars, 50 per cent of tractors and 60 per cent of motorcycles manufactured in the country ² . |
| 3 | IT sector | IT sector of Haryana have shown a notable growth in past decade. To support such an incomparable growth prospects State in past few years, has initiated a number of reinforcing projects for the further development of the sector. |
| 4 | Pharmaceuticals & Chemical Industry | Pharmaceuticals & Chemical Industry, being classified under essential business category, continued its operations even during the lockdown period. However, supply chain disruptions, logistics and operational glitches have hurt the Pharmaceuticals & Chemical Industry all over the country including Haryana. |
| 5 | MSME sector | MSMEs have high potential to contribute to the growth of any economy by aligning each small effort to boost the production, using abundance of locally available resources and most importantly generating enormous employment. Haryana have taken encouraging steps to promote MSMEs operations and entrepreneurship setting ups in the states. The state has witnessed a number of policy reforms to accommodate the requirement of these units to encourage them. |
| 6 | Handloom, Textile and garments manufacturing | Handlooms and handicrafts industry has continuing been growth partner of the state. The sector has generated enormous employment opportunities and helped in reducing the regional disparities. Abundant availability of raw materials gives Haryana a competitive advantage in the textile sector. |
| 7 | Defence manufacturing | Haryana provides various incentives to promote manufacturing in defence items and other measures to boost manufacturing in the state. |
| 8 | Clean Energy | The state is enthusiastically shown its concern for a cleaner future with large projects of solar energy in recent past. The major solar parks of over 400 acres of land are aimed |

² IBEF



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| | | at making the state self-sustainable in the matters of consumption of energy and saving resources while providing the opportunity for business in the sector. |
| 9 | Electronics industry | The state is one of India's biggest electronics hub and accounts for 50 per cent of the refrigerators manufactured in the country. |

1. Agriculture: agro based, Food Processing & allied Industry

Haryana is a food surplus state, have accorded the high priority to the agriculture and allied sectors due to its core competence in the area. It is the second largest foodgrain contributor to the central pools of India, one of the largest producing states for Cotton, Wheat, Paddy, Sugarcane and oil seeds. State is the significant contributor to the National basmati rice exports. Moreover, the state has strong agriculture infrastructure facilities coupled with agriculture research support and excellent extension network to disseminate the information related to improved farm practices to farmers.

The country wide lock down due to the covid-19 disease spread-out, has called out a severe labour shortage and transportation problems in agriculture sector. The paddy farmers have reported an acute shortage of skilled paddy growers/ workers due to lockdown led migration of workers to their native places. Moreover, floriculture sector has experienced huge losses due to lockdown as most of their produces got dried before realising the value for the same. It is worth noticing that, Haryana is known for its contribution to the national paddy produce and Indian foodgrain exports.

Haryana aggressively promotes organic farming; financial assistance is provided to farmers for production and use of vermin compost. As far as Kharif cultivation is concerned, the government has encouraged the farmers to opt for the cultivation of cotton and sugarcane, experiencing the shortage of skilled labour for paddy harvesting. The sector is likely to resume its position soon after the transportation and labour related issues get addressed due to pandemic covid-19.

2. Automobile Industry

Automotive Industry is the backbone of the economy of Haryana. It is one of India's largest automobile hubs and accounts for two thirds of passenger cars, 50 per cent of tractors and 60 per cent of motorcycles manufactured in the country. As far as current situations are concerned, the expenditure on lifestyle has gone down, hence the demand for the automobile products are going to be hit the most. The industry has taken up a production at lower operating capacity. Besides the consumers direct



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purchase of the industrial output, aviation, tourism and real estate demand slump has hurt the industry even more.

To deal with the serious issues which might severely hurt the industry, the Haryana government has released plans to ease the lockdown to run the industrial activities. In 14 districts of Haryana including Ambala, Bhiwani, Charkhi Dadri, Fatehabad, Hisar, Jind, Kaithal, Karnal, Kurukshetra, Mahendergarh, Rewari, Rohtak, Sirsa and Yamunanagar immediate self-generated approvals has been issued. The government has however, put a cap on workforce's physical presence on-job for non IT and ITes units to maintain the social distancing norms and control the spread of a life taking disease.

Owing to the relief in lockdown, most of automobile industry giants at Gurugram – Manesar -Bawal automobile belt have resumed their activities following all protocols for social distancing and well sanitized equipments and workers.

3. IT sector

IT sector of Haryana have shown a notable growth in the past few years. To support such an incomparable growth prospects State has initiated a number of reinforcing projects for the further development of the sector. These initiatives are incentives to promote cashless economy, e-office projects, online Aadhar enrollment, RAS "Rapid Assessment System" Integration, Atal Seva Kendras, State Data Centre (SDC), State wide Area Network (SWAN), Bharat net, Rural wi-fi Hotspots, Public wi-fi Hotspots, many renowned incubation centres, digital locker integration etc are a few of these initiatives.

However, the disruption caused by the pandemic to the IT sector is not that intense compare to other industries in the state. Having well established digital infrastructure, most of the companies managed to get the employees work from home with even higher productivity.

At this juncture, analysing the need to smoothen the working of the sector, government in its recent guidelines has allowed the smaller units to resume work following the safety guidelines. However, to reinforce the safety measures it has put a cap on workforce's physical presence on-job for non IT and ITes units to maintain the social distancing norms and control the spread of a life taking disease.

4. Pharmaceuticals & Chemical Industry

Pharmaceuticals & Chemical Industry, being classified under essential business category, continued its operations even during the lockdown period. However, supply chain

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disruptions, logistics and operational glitches have hurt the Pharmaceuticals & Chemical Industry all over the country including Haryana. The recent decision to easing out the lockdown initiatives of government of Haryana has however smoothen the supply chains, logistics and operational glitches being faced by the industry.

Moreover, governments' strong intentions to establish more Pharmaceutical parks and medical devices parks in the coming times are highly appreciable. Most of the states in India including Haryana have geared up to incentivise the private investment in the sector. Increasing demand for medicines and healthcare services domestically and internationally shows bright growth perspectives for the sector.

5. MSMEs sector

Haryana has been ranked 3rd nationwide for Ease of Doing Business slabs and 1st in north India. Haryana has taken several encouraging steps to promote MSMEs operations and entrepreneurship setting ups in the states. The state has witnessed a number of policy reforms to accommodate the requirement of these units.

The government of Haryana launched “**Enterprise Promotion Policy**” in 2015, in alignment with “**Make in India**”, “**Digital India**” and “**Skill India**” campaigns to drive state economy to the next level of growth trajectory. The policy offers attractive incentives to engage investment in state. The business climate of the state has been strengthened over the years owing to a number of industrial reforms to reduce the regulatory burden and attract private sector participation in the State's economy.

COVID-19 pandemic has affected the MSME sector adversely like many other industries. Market demand has been slashed which has caused the producers to operate on plant lower capacity. Further, disrupted transportation services, broken connectivity, logistics & supply chain, unavailability of skilled/ unskilled workers and other operational difficulties made the production a costly affair in current scenarios.

Moreover, to allow small entrepreneurs enter into the mining business and prevent any type of cartel formation or monopoly the State government granted the mineral concessions in respect of minor minerals throughout the state. The move has come out with encouraging participation by private players in the sector.

To facilitate industrial units in Haryana in retaining their employees amid covid-19 crisis, MSMEs existing as or before 15th march, 2020 have been extended interest subvention for six months for the payment of wages of employees.

6. Handloom, Textile and garments manufacturing

Abundant availability of raw materials gives Haryana a competitive advantage in the textile sector. As far as Khadi & Village Industrial (KVI) sector is concerned, the government in coordination with Haryana Khadi & Village Industries Board has proactively been working towards the promotion and development of the sub sector in rural areas. The objectives includes skill improvement, employment generation in rural area, transfer of technology, rural industrialisation, promoting self-resilience among people engaged and building up a strong rural community base. Moreover, to promote the KVI sector 2 outlets have been opened in the state for the sale of products manufactured by units financed by the Haryana Khadi & Village Industries Board. The board is in process of opening more such outlets in each district of the State.

The industry however, been harshly hit by the lockdown caused by pandemic COVID-19. Keeping in mind the proactive addressing the problems like shutting down of factories and plants and other operating hurdles being faced by industry by the state government, the production is likely to resume. The sector is demand driven, hence soon after the market demand for output starts rising, the sector would automatically come back to its long term trends.

7. Defence manufacturing

Haryana has constantly been encouraging foreign investment in the defence technology and weaponry sector inducting industrial units for the production of defence weapons in recent past. The defence manufacturing industry does not shows significant daunting effects of COVID-19 crisis. The sector is quite stable than the other growth promising Industries of the economy. However, lockdown has affected the production operations due to transportation issues, shortage of skilled labour due to unwarranted migration and impacted supply chains.

8. Clean Energy

Apart from being invested in varied industrial gamut, the state is also professing it's forward-thinking of a cleaner future with large projects of solar energy. The major solar parks of over 400 acres of land are aimed at making the state self-sustainable in the

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matters of consumption of energy and saving resources whilst providing the opportunity for business in the sector.

Similar to the defence manufacturing industry, clean energy production industry has not been significantly hurt by the pandemic. However the impacted supply chain, demand slumps, shortage of raw material, sudden change in geographical climate situation has warranted the immediate production circumstances but are short lived. Soon after the lockdown is lifted the industry would shift back to its original space.

9. Electronics Industry

The state is one of India's biggest electronics hub and accounts for 50 per cent of the refrigerators manufactured in the country. Exports of electric machinery and equipment for Haryana reached US\$ 1.41 billion in FY19 and US\$ 261.56 million between Apr-Dec 2019. As of February 2020, Haryana had a total installed power generation capacity of 12,500.44 MW; of which, 5557.78 MW by the private sector, 3,139.30 MW was contributed by the state and 3803.36 MW by the central sector.

COVID-19 pandemic has affected the electronics industry adversely like many other industries. Market demand has been slashed which has caused the producers to operate on plant lower capacity. Further, disrupted transportation services, broken connectivity, logistics & supply chain and other operational difficulties made the production a costly affair in current scenarios. At this juncture, analysing the ongoing disastrous times for the electronics industry the government in its recent guidelines has allowed the smaller units to resume work following the safety guidelines. However, to reinforce the safety measures it has put a cap on workforce’s physical presence on-job for non IT units to maintain the social distancing norms and control the spread of a life taking disease.

Table 12: Post COVID-19 Growth Prospects of Promising Sectors and Contribution to the Growth of State Economy

| s. no | Name | How the sector can contribute to the growth of state economy post COVID-19 |
|-------|-------------|--|
| 1 | Agriculture | <p>Haryana is a food surplus state, have accorded the high priority to the agriculture and allied sectors due to its core competence in the area.</p> <p>Haryana aggressively promotes organic farming; financial assistance is provided to farmers for production and use of vermin compost. As far as Kharif cultivation is concerned, the government has encouraged the</p> |



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| | | <p>farmers to opt for the cultivation of cotton and sugarcane, experiencing the shortage of skilled labour for paddy harvesting.</p> <p>Moreover, the state has strong agriculture infrastructure facilities coupled with agriculture research support and excellent extension network to disseminate the information related to improved farm practices to farmers.</p> <p>Further, this rabi season the sector had bumper production of major crops due to favourable monsoon and expecting to experience the same in upcoming kharif crop season. Hence, given the strong foundation coupled with favourable production levels of foodgrains and other commercial crops like cotton and sugarcane, the sector expects high potential to resume its strong position post COVID-19 crisis.</p> |
| 2 | Automobile Industry | <p>Haryana is one of India’s largest automobile hubs and currently hosting to many large automotive players. But currently the sector has badly been hurt due to the COVID-19 pandemic caused demand slumps, fall in production level, disrupted supply chain and shortage of input supply.</p> <p>However, to fight COVID-19 crisis many automakers modified their facilities to start making medical equipments to manufacture PPE kits, 3-ply masks, N-95 an N-90 masks, Ventilators, face shields, AMU bags, intubation boxes, sanitizers etc.</p> <p>This transformation would help the automotive Industry to generate more business opportunities post crisis. As far as existing capabilities are concerned, industry is mostly demand driven and pegged to lifestyle trends. Keeping in mind the proactive addressing the problems like shutting down of factories and plants, shrinking employment issues and other operating hurdles being faced by industry by the state government, the production is likely to resume.</p> <p>As soon as the country gets back on track, businesses get back to normal gains, industry would shift back to its original expansion path with even higher business opportunities and increased earnings.</p> |
| 3 | IT sector | <p>The state has experienced a notable growth in IT sector in recent times. And as far as the pandemic COVID-19 led disruptions to the IT sector are concern, it’s not that intense compare to other industries in the state. Having well established digital infrastructure, most of the companies managed to get the employees work from home with even higher</p> |



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| | | <p>productivity. Though the industry initially experienced a few problems but they were insignificant and the majority of the companies and MNCs managed to work during the lockdown without much distractions.</p> <p>Hence, given these facts it could be concluded that IT sector can survive these disruptions to some extent unlike many others. The industry has high growth prospects in upcoming times.</p> |
| 4 | Pharmaceuticals & Chemical Industry | <p>Since the industry is well equipped with digital infrastructure, it can allow most of the employees to work from home thereby saving time and enhance productivity. Increased productivity would further help the industry to lower the cost, allow operate at a higher scale and achieve economies of scale.</p> <p>Moreover, Increasing demand for medicines and healthcare services domestically and internationally shows bright growth perspectives for the sector. Further, the Healthcare sector of India is gaining domestic and international business day by day. The sector has attracted quite a large private investment in past decade, which is going to benefit the pharmaceutical industry directly.</p> |
| 5 | MSME sector | <p>It shall be noted that Haryana has been ranked 3rd nationwide for Ease of Doing Business slabs and 1st in north India, which is itself explanatory how sensitive the state is about the development of MSMEs in state. State has taken encouraging steps to promote MSMEs operations and entrepreneurship setting ups in the states including major policy reforms to accommodate the industry requirements.</p> <p>Moreover, to allow small entrepreneurs enter into the mining business the State government granted the mineral concessions in respect of minor minerals throughout the state. The move has come out with encouraging participation by private players in the sector.</p> <p>As far as MSME sectors contribution to the growth of the state post COVID-19 crisis is concerned, MSMEs are known for using the locally available inputs, availability of low cost labour and most importantly strong fundamental infrastructure being on place. The sector has lots of potential to grow even at less capital/ funds available.</p> |
| 6 | Handloom, | Abundant availability of raw materials, economical cost of labour, |



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| | Textile and garments manufacturing | <p>favourable policy environment has made the handicrafts & handloom sector a major growth partner of the state.</p> <p>The industry though, harshly been hit by the lockdown caused by pandemic. Keeping in mind the proactive addressing the problems like shutting down of factories and plants and other operating hurdles being faced by industry by the state government, the production is likely to resume. The sector is demand driven, hence soon after the market demand for output starts rising, the sector would automatically come back to its long term trends.</p> |
| 7 | Defence manufacturing | <p>Haryana has constantly been encouraging foreign investment in the defence technology and weaponry sector inducting industrial units for the production of defence weapons in recent past. The state provides land, special provisions to clear the way for it to become a strong contender.</p> <p>The sector is quite stable than the other growth promising Industries of the economy. However, lockdown has affected the production operations due to transportation issues, shortage of skilled labour due to unwarranted migration and broken national supply chain.</p> <p>Hence, the resilience of the sector and encouraging initiatives taken by the state government so far will surely help the Industry to resume its position post covid-19.</p> |
| 8 | Clean Energy | <p>Clean energy is the future of the world. Strategically Haryana is already prepared to meet potential future demand. State is currently investing in its core competitiveness by setting up major solar parks of over 400 acres of land are aimed at making the state self-sustainable in the matters of consumption of energy and saving.</p> <p>Moreover, sector seems somewhat immune to survive the COVID-19 pandemic. The sector has enormous business opportunities to learn and grow faster and be equipped for the upcoming huge consumption demands would be realised.</p> |
| 9 | Electronics Industry | <p>The state is one of India's biggest electronics hubs and assumes high potential to grow in normal circumstances as it has already been shown by the industry in past few decade. The state has experienced a high rate of growth from the sector which is incomparable with many industries.</p> <p>Though, as far as the pandemic COVID-19 led disruptions to the</p> |



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| | | <p>electronics Industry is concerned, market demand has been slashed like many other Industries. Disrupted transportation services, broken connectivity, logistics & supply chain and other operational difficulties made the production a costly affair in current scenarios.</p> <p>At this juncture, analysing the ongoing disastrous times for the electronics industry the government in its recent guidelines has allowed the smaller units to resume work following the safety guidelines. To reinforce the safety measures it has put a cap on workforce’s physical presence on-job for non IT and ITes units to maintain the social distancing norms and control the spread of a life taking disease. These proactive initiatives of the government are expected to go long way to deal with production side anomalies and allow the industry to survive now and rejuvenises soon after the crisis overs.</p> |
|--|--|--|

Suggestive Measures to rejuvenate the growth of the state post COVID-19 Crisis

In nut shell, above listed nine industries have higher potential to rejuvenate the growth of the State post COVID-19 crisis. Currently however the disruptions caused by pandemic coronavirus spread has put them down temporarily but cannot hold them for a longer run as astonishingly most of these sectors have evolved according to the situation and generate business opportunities out of it in long run. However, to help them survive the pandemic and support their evolution following measures could revive their productivity in the coming times:

1. Encourage the industries to promote for “work from home” culture

Amid COVID-19 crisis, most of the industries including IT industry, Pharmaceuticals Industry, selected MSMEs have experienced the positive side of “work from home culture”. Since many of the industries are well equipped with digital infrastructure, it can allow most of the employees to work from home and thereby saving time & enhance productivity. Increased productivity would further help the industry to lower the cost, allow operate at a higher scale and achieve economies of scale.

Moreover, it would help state government to save upon public transportation expenditures & maintenance as well as keep social safety from the spread of pandemic.

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2. Incentivise farmers to cultivate commercial crops and high value farm produce

Unwarranted migration of workers from Haryana has cause huge losses to paddy cultivators during Kharif crop season. These losses could be turned around to normal agricultural income by shifting the paddy growing farmers to cotton cultivation and other high value crops during the upcoming seasons. Moreover government shall consider providing the good quality seeds to farmers to ensure a high productivity per acre.

3. To smoothen the supply chain disruptions

Supply chain disruptions and logistic issues a common all, for which the government can issue policies using umbrella approach to mitigate the vulnerabilities caused by crisis. So, the state government shall come out with industry specific guidelines to provide support to them in these extremely difficult times.

4. MSMEs shall be given tax benefits and direct account transfers to support them survive the crisis

MSMEs have the highest potential to grow yet they are the ones who have been hit the most. Reasons behind these circumstances are that this industry is already been vulnerable to funding and mostly depends upon locally available raw material and skilled/unskilled labours. The connectivity breakdown due to lockdown has caused huge losses to these units which are incurable unless the state government intervenes to support the industry.

5. Easing out the labour laws

Easing of labour laws for a short time would help industries to bear the labour costs and boost the production level back to the normal capacity. The state government shall come out with a temporary time bound ordinance with an immediate effect to support the daunted performing industries.



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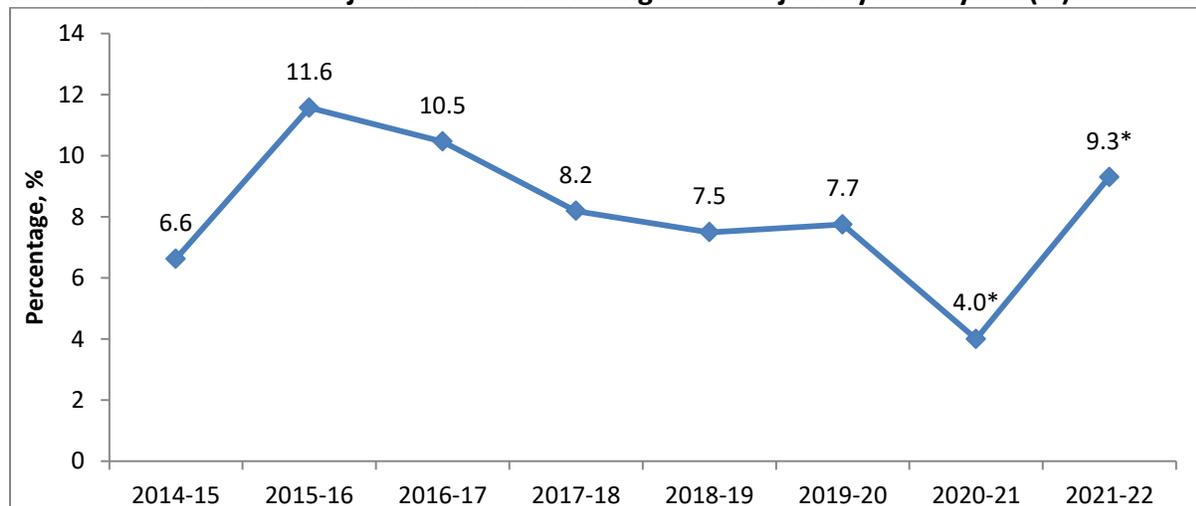
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5. Projections for Economic growth trajectory in Haryana

Haryana has emerged as one of the most industrialized States in the country. The State has taken many initiatives over the years to carve out a special place for itself in the fields of engineering, automobiles, textiles, leather, Information Technology, electronic hardware and hi-technology industries. Haryana is an agrarian state and one of the key contributors to the national food basket. The state enjoys top position in the production of basmati rice.

Several reforms have been undertaken by the state to promote agriculture sector, industrialization and services sector. The growth prospects of the state are very bright keeping in view the dynamic and vibrant growth provoking sectors of the state economy supported with strong policy environment. Going ahead, keeping in view the daunting impact of pandemic COVID-19 on the state economy, real GSDP of Haryana is projected to grow at a rate of 4% for FY2021. Further, with continuous reform measures by the State Government including promotion of ease of doing business, boosting industrial production, investments and low base effect, real GSDP of Haryana is estimated to grow at 9.3% for FY2022

Chart 4: Projections for Economic growth trajectory in Haryana (%)



Source: PHD Research Bureau, compiled from various sources; * Projections by PHD Research Bureau, PHDCCI



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Table 13: Projections for Economic growth trajectory in Haryana

| S.No. | Component of GDP | Share in GDP FY2019-20 (in%) | Growth Projections FY2019-20 (in%) | Growth Projections FY2020-21 (in%) | Growth Projections FY2021-22 (in%) | Remarks |
|-------|------------------|------------------------------|------------------------------------|------------------------------------|------------------------------------|---|
| 1 | Primary sector | 18.9 | 4.6 | 5.5 | 5 | Agriculture and allied activities is a low-hanging fruit at this juncture and more focused growth towards this sector will provide better results considering the state's focus on primary sector activities and reforms undertaken during the last 5-6 years. We estimate that state has potential to improve in growth trajectory of primary sector on an average at 5%p.a. |
| 2 | Secondary sector | 30.7 | 6.8 | 2 | 9.5 | Due to the lockdown, the secondary sector activities will decelerate significantly in the current year which is estimated at around 2%. However, the low base effect will be beneficial for growth of next year with revival of demand and we estimate growth at 9.5% in FY2021-22. |
| 3 | Tertiary sector | 50.4 | 8.8 | 5 | 11 | Due to the slowdown in service sector activities, we estimate growth to decrease to level of |



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| | | | | | | 5%. However, the low base effect will work and growth will accelerate to level of 11% in FY2021-22. |
| Total | | 100 | 6.7 | 4 | 9.3 | Overall the growth of current year will decelerate because of halt in major economic activities during lockdown; however the low base effect will be beneficial and growth will accelerate to level of 9.3% in FY2021-22. |

Source: PHD Research Bureau

6. Conclusions

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

The GSDP of Haryana has increased significantly during the recent years. The GSDP Haryana has increased significantly during the recent years. The state's GSDP at current prices has increased from about Rs. 437145 crores in FY2015 to about Rs. 831610 crores in FY2020. The real GSDP of the state has grown at 8.7% (average) during the period FY2015 to FY2020.

Tertiary sector contributes a significant share of around 50% in the GSVA of the state followed by the Secondary sector and primary sector at 31% and 19% respectively during FY2020. The NSDP at current prices of the Haryana has increased significantly from Rs 588274 crore in FY2018 to around Rs 755790 crore in FY2020.

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

Haryana is a very progressive state in the adoption of policy environment and a leading state for setting the pace for other states in the growth and productivity levels of agricultural produce. The state government is taking strides in the direction of producing fine quality of crop produce that will attract higher prices not only in the domestic markets but will also can gain popularity on the global platforms.

Haryana today has emerged as one of the most industrialized States in the country. Haryana offers a wide range of fiscal and policy incentives for boosting growth of various sectors of the economy. The State has taken many initiatives over the years to carve out a special place for itself in the fields of agriculture, engineering, automobiles, textiles, leather, Information Technology, electronic hardware and hi-technology industries.

According to the Business Reform Action Plan (BRAP) rankings for 2017-18, Haryana ranked 3rd in terms of ease of doing business. On December 20th, 2018, the Department of Industrial



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Policy and Promotion (DIPP) announced results of the first ever States' Start-up Ranking 2018 in which Haryana emerged among the 'Aspiring Leaders'.

MSMEs sector of the state has potential to drive growth of manufacturing sector and boost employment in the state. There are 9.7 Lakhs MSMEs in Haryana that constitute 1.53% of the MSMEs in all over India. The state has presence of many manufacturing clusters in the cities of Ambala, Panipat, Karnal, Kaithal, Yamunanagar, Sonapat, Rohtak among others which has boosted industries such as IT, textiles, food and handlooms.

Haryana has continuously focused on providing better and modernised infrastructural facilities in the state. The state has done very well in the field of information technology with the emergence of Gurugram as the hub of IT Industry. The numbers of commercial banks and regional rural banks have increased over the years in the state.

The growing severity of the impact caused by the widespread pandemic COVID-19, on our economy, its people and the Nation as a whole is a matter of deep concern. However, proactive reforms undertaken by the State Government of Haryana are highly appreciable. As on 27th May 2020, the state has 1381 active cases of COVID-19, 838 have been cured and 18 deaths.

The Government of Haryana has announced setting up of various facilitation windows to support and combat with pandemic COVID-19 especially for its people, trade and industry. Going ahead, the top 5 promising sectors of the Haryana that have an immense potential to bolster the trade and businesses scenario in the state in the coming times in the post COVID-19 scenario are agriculture & allied activities, automotives, IT & ITeS, textiles and real estate.

The growth prospects of the state are very bright keeping in view the dynamic and vibrant growth provoking sectors of the state economy supported with strong policy environment. Going ahead, keeping in view the daunting impact of pandemic COVID-19 on the state economy, real GSDP of Haryana is projected to grow at a rate of 4% for FY2021. Further, with continuous reform measures by the State Government including promotion of ease of doing business, boosting industrial production, investments and low base effect, real GSDP of Haryana is estimated to grow at 9.3% for FY2022.

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



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7. Way Forward

A few suggestions for the state of Haryana to mitigate the daunting impact of pandemic COVID-19 on trade and industry in the coming times to bolster industrial productivity, employment generation and sustain economic growth are as follows:

| S.No. | Sectors | Reforms/ Relief measures required to mitigate daunting impact of pandemic COVID-19 | Outcome |
|-------|--|---|---|
| 1 | Agro and food processing industry | <p>The State has a huge potential for establishment of agro-based and food processing industry. The government may further take initiatives to increase investment in proper post-harvest handling facilities and strengthen adequate infrastructure facilities along with the supply chain to reduce the losses due to wastage of substantial quantity of farm produce especially perishable commodities.</p> <p>Moreover, the food processing industry in Haryana, comprising a large scale international players and a multitude of small-scale players and cottage industries, should be consolidated to reap the benefits of economies of scale.</p> | <p>The proactive reforms in the agro and food processing industry would increase the self-sufficiency of the state, expand warehousing infrastructure and would increase employment opportunities arising from the agro processing industry.</p> <p>Low cost of credit must be enhanced for farmers to enable them to undertake agricultural activities at low cost of borrowing.</p> |
| 2 | Manufacturing sector | <p>Haryana has a large base of semi-skilled and skilled labour, making it an ideal destination for knowledge based & manufacturing sectors.</p> <p>Given this, reforms in the manufacturing sector should be further focussed by the government so as to facilitate its growth and generate significant employment opportunities in the state.</p> | <p>Bolstering the manufacturing sector would increase employment in the state and would drive the state's economy on a higher growth trajectory.</p> |
| 3 | Service sector | <p>To bolster the growth of service sector of the state, government must design & develop services led growth strategy focusing on health, education, IT, logistics, bulk courier services, knowledge</p> | <p>Development of services sector would inculcate the spirit of entrepreneurship within the state's economy, which would aid</p> |



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| | | <p>based & non-polluting services, sports etc.</p> <p>Further, new business ventures in the services sector should be encouraged by the state for which easy availability of loans and simplification of regulatory process should be promoted.</p> | <p>the economy in recuperating from the pandemic coronavirus.</p> |
| 4 | Exports | <p>Exports play a vital role in the economic growth of Haryana as the state's performance on the export front has been excellent. There is a need to provide more facilities/incentives to the exporting units for increasing exports from the state. The government is constantly working towards improvement in infrastructure, as it is an important growth driver and its development is essential for long term growth prospects of an economy.</p> | <p>Increasing the exports would increase the GDP of the state that would increase the demand within the state and would also increase the productivity of the state.</p> |
| 5 | Textile Sector | <p>Haryana is the fourth largest producer of cotton in India and contributes around 6 per cent of the country's total production. Hence, easy availability of raw material and costs of doing business will provide much needed push to textiles sector and generate employment opportunities for the growing young workforce.</p> | <p>The textile sector has an ability to generate huge employment and provide massive returns that would spur the liquidity in Haryana and would lead a higher economic growth trajectory for economy.</p> |
| 6 | Auto and component manufacturing and real estate | <p>Auto and Haryana is a preferred destination for auto majors and auto component manufacturers and its real estate market is also very attractive for residential and industrial purposes.</p> | <p>A designated spur to the auto manufacturing and real estate sectors will strengthen the state's economy.</p> <p>The state government focus on job creation by promoting labour intensive manufacturing and automotive manufacturing would spur the creation of a policy framework for re-</p> |



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| | | skilling and up skilling. |
| 7 | Investments | For bolstering the growth of economy, the Government of Haryana should focus on increasing the investments by stepping up government spending, creating an enabling business environment, boost demand in the economy by bolstering industrial growth through flexible labour and land laws, enhancing the rural demand and indexing all measures for promotion of Housing, Real Estate and Construction. |
| 8 | Ease of doing business | <p>The state government of Haryana should focus on further promoting ease of doing business by simplifying the compliances and reducing the cost of doing business. Haryana government should facilitate low cost trade finance, improving the export logistics infrastructure, removing bottlenecks at ports.</p> <p>The ease of doing business for the industries in the state must be enhanced further. Private sector should be encouraged and incentivized to uplift the industrially backward regions of the state. Further, focus should be on use of environment friendly technologies to enable sustainable development of the state. Efficient use of waste land and water should be encouraged vis-à-vis promoting usage of alternate sources of energy in the industrial sector.</p> |
| 9 | Banking sector | The reforms in the banking sector become crucial such as process and priority of loan sanctions. The government, at this juncture should promptly address this issue and restore confidence among NBFCs as this is very crucial sector for real estate, infrastructure and SMEs. |
| 10 | MSME sector | Bolstering the MSME sector, easy availability of loans at low interest must be ensured for MSMEs, initiatives must be taken to encourage private participation, facilitation in terms of R&D/Innovation, access to technology, marketing support, among others. |

Source: PHD Research Bureau, compiled from various sources

Going ahead, the government should focus on major engines of economic growth such as public investment, private investments, private consumption, bolstering manufacturing and revitalizing exports. Public investments in infrastructure and affordable housing would create demand for commodities such as steel and cement and lead to kick-start private investments. There is a need to fast track the infrastructure projects; expedite the building of National Highways to create employment opportunities.

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In a nutshell, the State Government must focus on improving quality of infrastructure, enhancing agriculture productivity, addressing inflexibilities in labour markets, reforming manufacturing sector to bolster industrialisation. The government should focus on improving the quality of education, attracting investments in health sector and strengthening rural development.

7.1 Opportunities for start-ups and growing workforce in Haryana

Agro & food processing Industry

Agriculture sector and the food processing Industry in Haryana are the low hanging fruit to support the GDP growth and generate employment for the growing workforce in Haryana. The Agriculture sector is one of the biggest employment generators of the state, providing employment to more than 50% people in the state in agriculture & allied activities and more than 31% of Industrial employment in agriculture based industries including MSMEs & Food Processing Industries.

Further, the Rabi crops have shown a bumper production this year going forward kharif crops also expected to beat the earlier set trends and targets with a bumper produce. With this backdrop, the sector possesses tremendous employment opportunity for unskilled, semi-skilled and skilled workforce in the state and new avenues for the start-ups with their innovative ideas in the food processing segment. It has good potential and good productivity to move fast in this growth promising sub-sectors including commercial harvesting, allied activities, food processing etc.

The food processing sector coupled with the involvement of the growing workforce have potential to tap opportunities in the sector with more and more focus on the exports of agri and food processing products. The state must focus on shifting disguised workforce from basic agriculture sector towards the food processing Industry. Nevertheless, the Agro & food processing Industry sector has potential to create 1 lakh new employment opportunities in the next 2 years.

Service Sector

Recently, the service sector has largely been impacted during the lockdown period however going forward with the resumption of the supporting activities the growth will shift back to steady up and the service sector would grow at 5% in the current year and at around 11% in the next year. Coupled with this growth trajectory the state has tremendous opportunities for the growing workforce in the areas of IT services, digitalisation, telecom services, transportation services, internet & Wi-Fi services and banking & financial services sector among others.



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In IT Sector specifically, the State government is working extensively in the domain of cyber security. Some of the initiatives are in the pipeline for seamless implementation of the Cyber Security Policy in Haryana. Moreover, the state government is showing up regularly on Industrial meeting & digital corridors to negotiate with the large MNCs and Companies shift from China and looking for competent avenues to show the state's interest to work with them. Given these tireless efforts, state can create at least 2 lakh opportunities in the sector in next 2 years.

Manufacturing sector

The manufacturing activities of crucial components of key industries including MSMEs, construction & Architecture Industry, Automobile Industry, Textile handloom & handicrafts industry forms the major bolstering sectors of Economy of Haryana with high growth avenues in times to come.

The business climate of the state has been strengthened over the years owing to a number of Industrial reforms to reduce the regulatory burden and attract private sector participation in the State's economy. In 2017-18 Ease of Doing Business ranking released by department of Industrial Policy and Promotion, Government of India, Haryana ranked 3rd in the country and 1st in North India.

The contribution of Construction and Architecture sector to the state GVA is quite significant. The sector have registered 5.2% growth rate and contributes 23.57% in total sectoral GSVA of the state from Industry sector.

As far as electronics Industry is concerned, the state is one of India's biggest electronics hub and accounts for about half of the refrigerators manufactured in the country. The sector possesses strong foundation and ground level infrastructure that have potential to generate high job opportunities for skilled and unskilled workforce.

Moreover, the Automotive Industry is the backbone of the economy of Haryana. It is one of India's largest automobile hubs and accounts for a quite high share in passenger cars, tractors and motorcycles manufactured in the country. As far as current situations are concerned, the expenditure on lifestyle has gone down, hence the demand for the automobile products are going to be hit the most. However, as soon as the COVID crisis passes the industry possesses strong foundation to swing back to its original growth trajectory with flying colours.

Textile handloom & handicrafts Industry have high potential to generate employment opportunities and help reducing regional disparities. Khadi & Village industries have recently shown a favourable growth due to highly proactive promotions being undertaken by the



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Haryana Khadi & Village Industries Board, State government and Central Government. Moreover, to promote the KVI sector 2 outlets have been opened in the state for the sale of products manufactured by units financed by the Haryana Khadi & Village Industries Board. The board is in process of opening more such outlets in each district of the State. This will allow handlooms & handicrafts producers to be able to sell their produces at highly competitive price and a wider market outreach there by motivate start-ups to join the workforce and create employment opportunities.

Further, Exports handlooms handicrafts textile inherent strength of Haryana, it has new employment opportunities for skilled and unskilled workforce in upcoming years. Given these strong Industry specific foundations, Haryana has high potential to generate 1 lakh jobs in next 2 years for tremendously increasing skilled & unskilled workforce in various sub sectors.

MSMEs & Exports

Exports play a vital role in the economic growth of Haryana as the state's performance on the export front has been excellent. The state is known for its contribution to agri exports. The major export items from the state are software, handloom products, scientific instruments, garments, automobiles and automotive components, electrical appliances, rice, pickles, etc. The agro-based industry of Haryana still holds a strong potential for exports. Further, providing more facilities/incentives to the exporting units would increase exports from the state. The growth prospects of the state are very bright keeping in view the dynamic and vibrant growth provoking sectors of the state economy supported with strong policy environment. Going ahead, keeping in view the daunting impact of pandemic COVID-19 on the state economy, real GSDP of Haryana is projected to grow at a rate of 4% for FY2021. Further, with continuous reform measures by the State Government including promotion of ease of doing business, boosting industrial production, investments and low base effect, real GSDP of Haryana is estimated to grow at 9.3% for FY2022 and the exports sector individually have potential to generate 1 lakh employment opportunities in next 2 years.

On the MSMEs front, Haryana is an emerging manufacturing hub for Indian economy having immense scope for the development of the micro, small and medium enterprises (MSMEs) sector. MSMEs sector of the state has potential to drive growth of Agro & food processing Industry, manufacturing sector as well as the service sector in the state and boost tremendous employment generation in the state. There are 9.7 Lakhs MSMEs in Haryana that constitute 1.5% of the MSMEs in all over India. MSMEs are complementary to large industries as ancillary units. Therefore, Government of Haryana has placed strong focus on the development of this sector.



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Moreover as per the recent announcements of Central government, the scope of MSMEs has widened further to include firms with upto 250 crore turnovers in its ambit. Companies with upto 50 crore investments and 250 crore turnover is classified as a medium enterprise.

Micro enterprises now onwards will comprise of 1 crore Investment and upto 5 crore turnover while businesses upto 10 crore and turnover of upto Rs 50 crore has classified as small. This initiative will pave the way for many COVID-19 daunted businesses and help them come back to the growth tracks.

MSMEs form the part for all the above listed sectors viz. agriculture & food processing, Manufacturing, services & exports. The recent proactive measures have further strengthened the Industry to grow and generate about 2 lakh job opportunities in next 2 years.

This way the Agro & food processing Industry, services sector, manufacturing sector and exports coupled with the MSME sector & Start-up has the potential to generate 7 lakh employment opportunities for skilled, semi-skilled and un skilled workers in next two years.



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PHD Research Bureau

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

The Research Bureau has been instrumental in forecasting various lead economic indicators national and sub-national. Many of its research reports have been widely covered by media and leading newspapers. The Research Bureau has undertaken various policy studies for Government of India and State Governments.

| Research Activities | Comments on Economic Developments | Newsletters | Consultancy |
|---|---|--|---|
| <ul style="list-style-type: none"> Research Studies | <ul style="list-style-type: none"> Global Economic Developments | <ul style="list-style-type: none"> Economic Affairs Newsletter (EAC) | <ul style="list-style-type: none"> Trade and Investment Facilitation Services (TIFS) |
| <ul style="list-style-type: none"> State Profiles | <ul style="list-style-type: none"> India's Economic Developments | <ul style="list-style-type: none"> Forex and FEMA Newsletter | <ul style="list-style-type: none"> Business Research and Consultancy: Innovative and customised research solutions for growth of Industry and businesses |
| <ul style="list-style-type: none"> Impact Assessments | <ul style="list-style-type: none"> States' Economic Developments | <ul style="list-style-type: none"> Global Economic Monitor (GEM) | |
| <ul style="list-style-type: none"> Thematic Research Reports | <ul style="list-style-type: none"> International Developments | <ul style="list-style-type: none"> Trade & Investment Facilitation Services (TIFS) Newsletter | |
| <ul style="list-style-type: none"> Releases on Economic Developments | <ul style="list-style-type: none"> Financial Markets | <ul style="list-style-type: none"> State Development Monitor (SDM) | |
| | <ul style="list-style-type: none"> Foreign exchange market | | |
| | <ul style="list-style-type: none"> Developments in International Trade | | |



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Studies Undertaken by PHD Research Bureau

A: Thematic research reports

1. Comparative study on power situation in Northern and Central states of India (September 2011)
2. Economic Analysis of State (October 2011)
3. Growth Prospects of the Indian Economy, Vision 2021 (December 2011)
4. Budget 2012-13: Move Towards Consolidation (March 2012)
5. Emerging Trends in Exchange Rate Volatility (Apr 2012)
6. The Indian Direct Selling Industry Annual Survey 2010-11 (May 2012)
7. Global Economic Challenges: Implications for India (May 2012)
8. India Agronomics: An Agriculture Economy Update (August 2012)
9. Reforms to Push Growth on High Road (September 2012)
10. The Indian Direct Selling Industry Annual Survey 2011-12: Beating Slowdown (March 2013)
11. Budget 2013-14: Moving on reforms (March 2013)
12. India- Africa Promise Diverse Opportunities (November 2013)
13. India- Africa Promise Diverse Opportunities: Suggestions Report (November 2013)
14. Annual survey of Indian Direct Selling Industry-2012-13 (December 2013)
15. Imperatives for Double Digit Growth (December 2013)
16. Women Safety in Delhi: Issues and Challenges to Employment (March 2014)
17. Emerging Contours in the MSME sector of Uttarakhand (April 2014)
18. Roadmap for New Government (May 2014)
19. Youth Economics (May 2014)
20. Economy on the Eve of Union Budget 2014-15 (July 2014)
21. Budget 2014-15: Promise of Progress (July 2014)
22. Agronomics 2014: Impact on economic growth and inflation (August 2014)
23. 100 Days of new Government (September 2014)
24. Make in India: Bolstering Manufacturing Sector (October 2014)
25. The Indian Direct Selling Industry Annual Survey 2013-14 (November 2014)
26. Participated in a survey to audit SEZs in India with CAG Office of India (November 2014)
27. Role of MSMEs in Make in India with reference to Ease of Doing Business in Ghaziabad (Nov 2014)
28. Exploring Prospects for Make in India and Made in India: A Study (January 2015)
29. SEZs in India: Criss-Cross Concerns (February 2015)
30. Socio-Economic Impact of Check Dams in Sikar District of Rajasthan (February 2015)
31. India - USA Economic Relations (February 2015)
32. Economy on the Eve of Union Budget 2015-16 (February 2015)
33. Budget Analysis (2015-16)
34. Druzhba-Dosti: India's Trade Opportunities with Russia (April 2015)
35. Impact of Labour Reforms on Industry in Rajasthan: A survey study (July 2015)
36. Progress of Make in India (September 2015)
37. Grown Diamonds, A Sunrise Industry in India: Prospects for Economic Growth (November 2015)
38. Annual survey of Indian Direct Selling Industry 2014-15 (December 2015)
39. India's Foreign Trade Policy Environment Past, Present and Future (December 2015)
40. Revisiting the emerging economic powers as drivers in promoting global economic growth (February 2016)
41. Bolstering MSMEs for Make in India with special focus on CSR (March 2016)
42. BREXIT impact on Indian Economy (July 2016)
43. India's Exports Outlook (August 2016)
44. Ease of Doing Business : Suggestive Measures for States (October 2016)
45. Transforming India through Make in India, Skill India and Digital India (November 2016)
46. Impact of Demonetization on Economy, Businesses and People (January 2017)



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47. Economy on the eve of Budget 2017-18 (January 2017)
48. Union Budget 2017-18: A budget for all-inclusive development (January 2017)
49. Annual Survey of Indian Direct Selling Industry 2015-16 (February 2017)
50. Worklife Balance and Health Concerns of Women: A Survey (March 2017)
51. Special Economic Zones: Performance, Problems and Opportunities (April 2017)
52. Feasibility Study (socio-Economic Survey) of Ambala and Rohtak Districts in Haryana (March 2017)
53. Goods and Services (GST): So far (July 2017)
54. Reshaping India-Africa Trade: Dynamics and Export Potentiality of Indian Products in Africa (July 2017)
55. Industry Perspective on Bitcoins (July 2017)
56. Senior Housing: A sunrise sector in India (August 2017)
57. Current state of the economy (October 2017)
58. Equitable finance to fulfill funding requirements of Indian Economy (October 2017)
59. The Wall of Protectionism: : Rise and Rise of Protectionist Policies in the Global Arena, (November 2017)
60. India-Israel Relations: Building Bridges of Dynamic Trade(October 2017)
61. Role of Trade Infrastructure for Export Scheme (TIES) in Improving Export Competitiveness (November 2017)
62. India - China Trade Relationship: The Trade Giants of Past, Present and Future (January 2018)
63. Analysis of Trade Pattern between India and ASEAN(January 2018)
64. Union Budget 2018-19 – (February 2018)
65. Ease of Doing Work for Women: A survey of Delhi NCR (February 2018)
66. Restraining Wilful Defaults: Need of the hour for Indian Banking System (March 2018)
67. Impact of GST on Business, Industry and Exporters (April 2018)
68. India – Sri Lanka Bilateral Relations: Reinforcing trade and investment prospects (May 2018)
69. Growth Prospects of the Indian Economy: Road to US \$5 Trillion Economy(May 2018)
70. India's Free Trade Agreements Dynamics and Diagnostics of Trade Prospects(May 2018)
71. India – UK Trade Relations and Societal Links: Way Forward (June 2018)
72. Rural Economy: Road to US \$5 Trillion Economy(September 2018)
73. Indian Economy on the Eve of Union Budget 2019-20 (Interim): Steady...strong...fastest moving economy (January 2019)
74. Interim Budget 2019-2020: A Dynamic, Inclusive & Pragmatic Budget (February 2019)
75. Women Entrepreneurship: Transforming from Domestic Households to Financial Independence (March 2019)
76. Prospects for Exports from India: Five Pronged Strategy to Achieve USD700 Billion Merchandise Exports by 2025 (March 2019)
77. India Towards Shared Prosperity: Economic Agenda for the Next five Years (March 2019)
78. Job Creation: A Pan India Survey of Households (March 2019)
79. India Inc. Speaks Live: Wish List for the Next Five Years (May 2019)
80. Suggestive Roadmap for Revitalizing Economic Growth (June 2019)
81. Indian Economy on the Eve of Union Budget 2019-20 (July 2019)
82. Union Budget 2019-20: Road to US\$ 5 trillion economy (July 2019)
83. Ease of Doing Business for MSMEs (September 2019)
84. Report Emerging contours in the defence and homeland security
85. Framework of University-Industry Linkages in Research DSIR
86. India's Trade and Investment opportunities with ASEAN Economies (November 2019)
87. Indian Economy on the Eve of Union Budget 2020-21 (February 2020)
88. Union Budget 2020-21: Aspirational, Caring and Developmental Budget (February 2020)
89. Macroeconomic Indicators and Pandemic COVID-19 Stimulus provided by Select Economies (April 2020)
90. Report on impact of Pandemic COVID-19 by PHDCCI (April 2020)
91. Tax relief measures provided by Pandemic COVID-19 impacted Countries (April 2020)
92. Impact of Pandemic COVID-19 : PHD Chamber's detailed representation on short term and long term measures submitted to the Government (April 2020)
- 93.



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93. Mitigating the Impact of Pandemic COVID19 on Trade & Industry: PHDCCI Representations to Government of India and State Governments (April 2020)

B: State profiles

1. Rajasthan: The State Profile (April 2011)
2. Uttarakhand: The State Profile (June 2011)
3. Punjab: The State Profile (November 2011)
4. J&K: The State Profile (December 2011)
5. Uttar Pradesh: The State Profile (December 2011)
6. Bihar: The State Profile (June 2012)
7. Himachal Pradesh: The State Profile (June 2012)
8. Madhya Pradesh: The State Profile (August 2012)
9. Resurgent Bihar (April 2013)
10. Life ahead for Uttarakhand (August 2013)
11. Punjab: The State Profile (February 2014)
12. Haryana: Bolstering Industrialization (May 2015)
13. Progressive Uttar Pradesh: Building Uttar Pradesh of Tomorrow (August 2015),
14. Suggestions for Progressive Uttar Pradesh (August 2015)
15. State profile of Telangana- The dynamic state of India (April 2016)
16. Smart Infrastructure Summit 2016- Transforming Uttar Pradesh (August 2016)
17. Smart Infrastructure Summit 2016-Transforming Uttar Pradesh : Suggestions for the State Government (August 2016)
18. Rising Jharkhand: An Emerging Investment Hub (February 2017)
19. Punjab: Roadmap for the New Government Suggestions for the Industrial and Socio-Economic Development – Focus MSMEs ease of doing business (May 2017)
20. Prospering Himachal Pradesh: A Mountain of Opportunities (August 2017)
21. Kashmir: The way forward (February 2018)
22. Analysis of State Budgets for 2018-19: Select Sates (March 2018)
23. Rising Uttar Pradesh One District One Product Summit (August 2018)
24. Rajasthan: Steady Strides into the Future- Emerging Growth Dynamics and the Way Forward (September 2018)
25. Rising Jharkhand: Economic Profile (January 2019)
26. Rising Jharkhand: Skill Development to Spur Socio-Economic Growth (January 2019)
27. Progressive Haryana: Economic Profile (February 2019)
28. Progressive Haryana: The Agricultural Hub of India (February 2019)



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