



# Maharashtra IT/ITeS Sector

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# Magnetic Maharashtra

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# Maharashtra — The enduring leader

## Macro Economic Profile for Maharashtra



The State attracts the highest FDI Investment — INR 97,799 crore (Aug '91 – March '12)

<b>GSDP contribution</b>	<b>14.4 per cent of India GDP at current prices for 2011-12</b>
Per Capita Income	INR 95,339 (at current prices)
Employment	14.58 per cent of India
Exports	21.4 per cent of India
Industrial output	16.7 per cent of India ( as per the Annual Survey of Industries 2009-10)
Industry growth rate	9.1 per cent. (2010-11 E)

Source: Economic Survey of Maharashtra, 2012-13

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## Macro Economic Profile



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### Road and Railways

- ▶ 99.2 per cent of the villages are well connected with all weather roads in the state
- ▶ 9.2 percent of total railway network in the country
- ▶ 2 Major Railway zones
- ▶ Dry Ports — Truck terminals and Railway sidings for easy freight movement

### Industries

- ▶ Industrial Investment — Projects approved are 17779 inviting proposed investment of INR 9,50,972 Cr.
- ▶ Employment to be generated by the proposed projects is nearly 4 million that is nearly 20 per cent of national average
- ▶ FDI proposed investment INR 97799, 23 per cent of India

### Air and Water Ports

- ▶ 4 International and 5 Domestic Airports
- ▶ 6 MIDC airstrips
- ▶ 3 Major ports
- ▶ 21.76 per cent of the total cargo traffic of the major ports in India is handled by the JnPT and MbPT ports
- ▶ 53 Minor ports

### Electricity

- ▶ Total State generation 83017 Million kwh nearly 10 per cent
- ▶ Total consumption 87396 Million kwh more than 14 per cent of India
- ▶ Industrial consumption is at 34416 Million kwh more than 15 per cent of India

Source: Economic Survey of Maharashtra, 2012-13

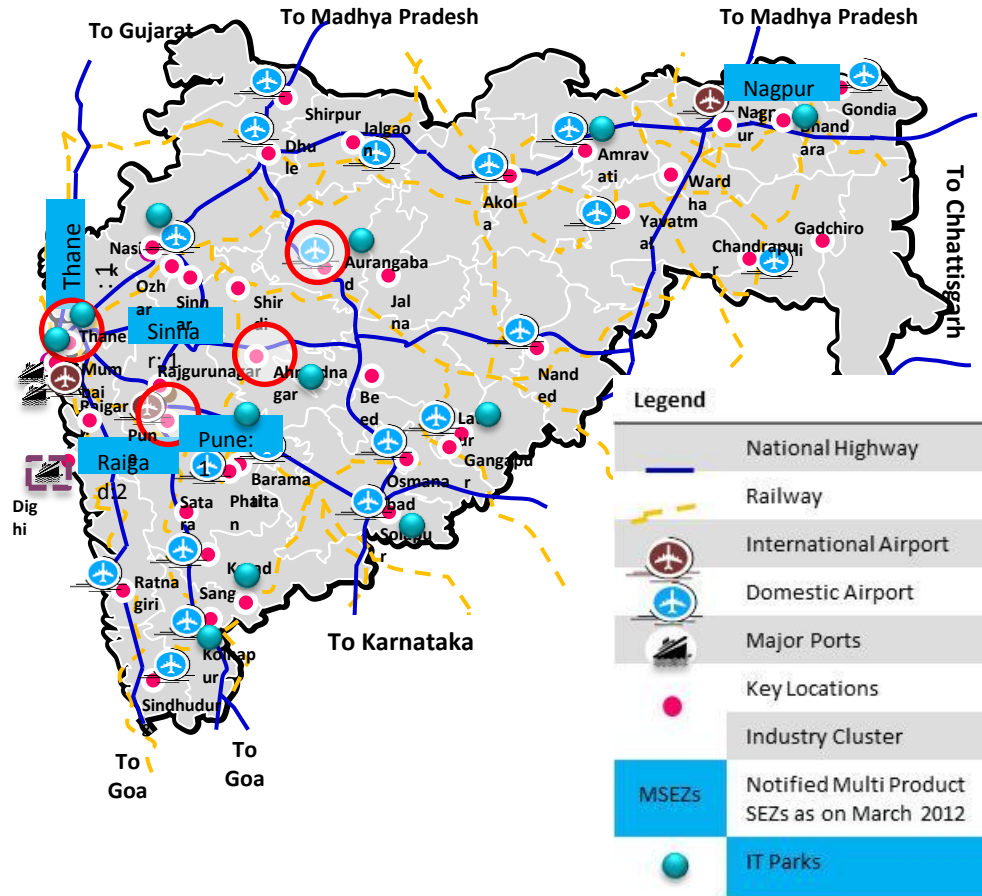
The IT/ITeS sector have generated USD101 billion in revenue during FY12, compared to USD88.1 billion in FY11, at a growth rate of 14.4 per cent

- ▶ As a proportion of India's GDP, the contribution of IT sector has risen to 7.5 per cent in FY12 from 1.2 per cent in FY98
- ▶ Forecast — Real GDP growth of 5.5 per cent in 2013, up from 5.0 per cent in 2012
- ▶ Strength of consumer spending is expected to remain the main PC market driver in 2013, accounting for close ~50 per cent of sales
- ▶ Growth at a CAGR of 13.6 per cent during FY08-12E despite weak global economic growth scenario
- ▶ In 2010-11, Maharashtra accounted for around 23.2 per cent of the software exports (made by registered units through STPI) of the country
- ▶ The Government of Maharashtra is focusing on providing IT-related infrastructure, fiscal incentives to IT units and an institutional framework for the IT sector
- ▶ Maharashtra has 37 public IT parks established by MIDC and CIDCO. A total of 451 private IT parks have been approved in the state, out of which 107 are functional
- ▶ The prime IT/ITeS cluster are Greater Mumbai, Pune, Thane, and Nashik

# Growth Drivers

MIDC has provided 32 developed and 4 proposed IT Parks in the state

## List of 32 Developed MIDC IT Parks



- ▶ “Santa Cruz Electronics Export Promotion Zone (SEEPZ), Mumbai
- ▶ Marol IT & Industrial Park, Mumbai
- ▶ Samrudhi Venture Park MIDC, Mumbai
- ▶ Millennium Business Park Mahape, Dist-Thane
- ▶ Millennium Business Park (Phase-II) Mahape, Thane
- ▶ Electronics Zone TTC, Mahape, Dist-Thane
- ▶ Wagale Estate, Thane
- ▶ Airoli Knowledge Park Airoli, TTC Thane
- ▶ Talawade Software Technology Park Talawade, Pune
- ▶ Pune Infotech Park Hinjawadi, Pune
- ▶ Kharadi Knowledge Park, Pune
- ▶ Pune Infotech Park (Phase II) Hinjawadi, Pune
- ▶ Software Technology Park Sadar, Nagpur
- ▶ Software Technology Park Chikalathana/Waluj (MIDC)
- ▶ Parsodi IT Park, Nagpur
- ▶ Ambad IT Park Ambad, Kolhapur
- ▶ Kolhapur IT Park Kolhapur
- ▶ IT Park Latur
- ▶ Software Technology Park Solapur
- ▶ IT Park Sangli Sangli
- ▶ IT Park, Ahmadnagar
- ▶ IT Park, Satara
- ▶ IT Park Amravati Amravati
- ▶ Pune Infotech Park, (Rajiv Gandhi Infotech Park) (Phase-III) Hinjawadi, Pune
- ▶ Ambarnath IT Park
- ▶ Ambarnath Industrial, Thane
- ▶ Butibori Industrial Park Nagpur
- ▶ Ambad IT Park Ambad – Nashik
- ▶ Software Acknowledge Park Sadar-Nagpur
- ▶ Information Technology Park-Solapur Chincholi Solapur
- ▶ Butibori Public IT Park No1 Butibori, Nagpur
- ▶ Latur Public IT Park Latur
- ▶ Butibori Industrial Park, Nagpur

# Key Opportunities in the State



The Maharashtra state looks to invest in the emerging IT/ITeS industries. These include the following —

## New geographies

BRIC nations, continental Europe and Japan have IT spending of over USD183 billion but contribute only 12 per cent of India's IT revenues. Adoption of technology and outsourcing is expected to make Asia the second largest IT market.

## New customer segments

SMBs have IT spend of over USD185 billion but contribute only 15 per cent of India's IT revenues. Emergence of new service offerings and business models will aid in tapping this market profitably and efficiently.

## New verticals

Public sector, healthcare, media and utilities have IT spend of over USD587 billion but constitute only 20 per cent of India's IT revenues. A number of sectors are expected to depend on technology and service providers to reduce the cost to serve.

Source: International Data Corporation (IDC) and Nasscom and are FY10 estimates. Notes: SMB- Small and Medium Businesses.

Maharashtra has a literacy rate of 82.9 per cent with a large base of skilled and industrial labor

- ▶ The Govt. is promoting "Centers of Excellence", which will cover all aspects of cutting edge research and development in emerging areas of sciences and technology
- ▶ The state also has one of the Indian Institutes of Technology (IITs) at Powai in Mumbai, part of the country's renowned network of engineering and technology institutions. IIT Mumbai has 13 departments and various centers for R&D\*
- ▶ Centre for Development of Advanced Computing (C-DAC), the Bhabha Atomic Research Centre, the National Environmental Engineering Research Institute, the National Chemical Laboratories and the Tata Institute of Fundamental Research

## Manpower strength in Maharashtra

Sector	Institutions	Capacity
Engineering (Diploma, Degree and PG)	1004	323533
Management Sciences	508	60100
Industrial Training Institutes	766	1,54,710

Source: Economic Survey of Maharashtra, 2012-13



# Government Policy and regulatory support



## Government Initiatives

- ▶ Additional FSI for IT parks and recreational, residential and other support facilities will be provided. Eligible IT-ITES units covered under PSI will be exempt from payment of Electricity Duty, IT/ITES units will be supplied power at industrial rates
- ▶ Property tax shall be levied on IT-ITES units at par with residential rates
- ▶ VAT on sale of IT products will generally be charged at the minimum floor rate

### State Industrial Policy support

Industrial Promotion Subsidy (IPS)

Incentives for Cleaner Production

Incentives for Technology Up gradation

Interest Subsidy

Exemption from Electricity Duty

Waiver of Stamp Duty

Royalty Refund

Incentive for Water Conservation

Incentive for Water & Energy Audit Subsidy

Incentive for Water & Energy Subsidy

### Relevant documents to refer to:

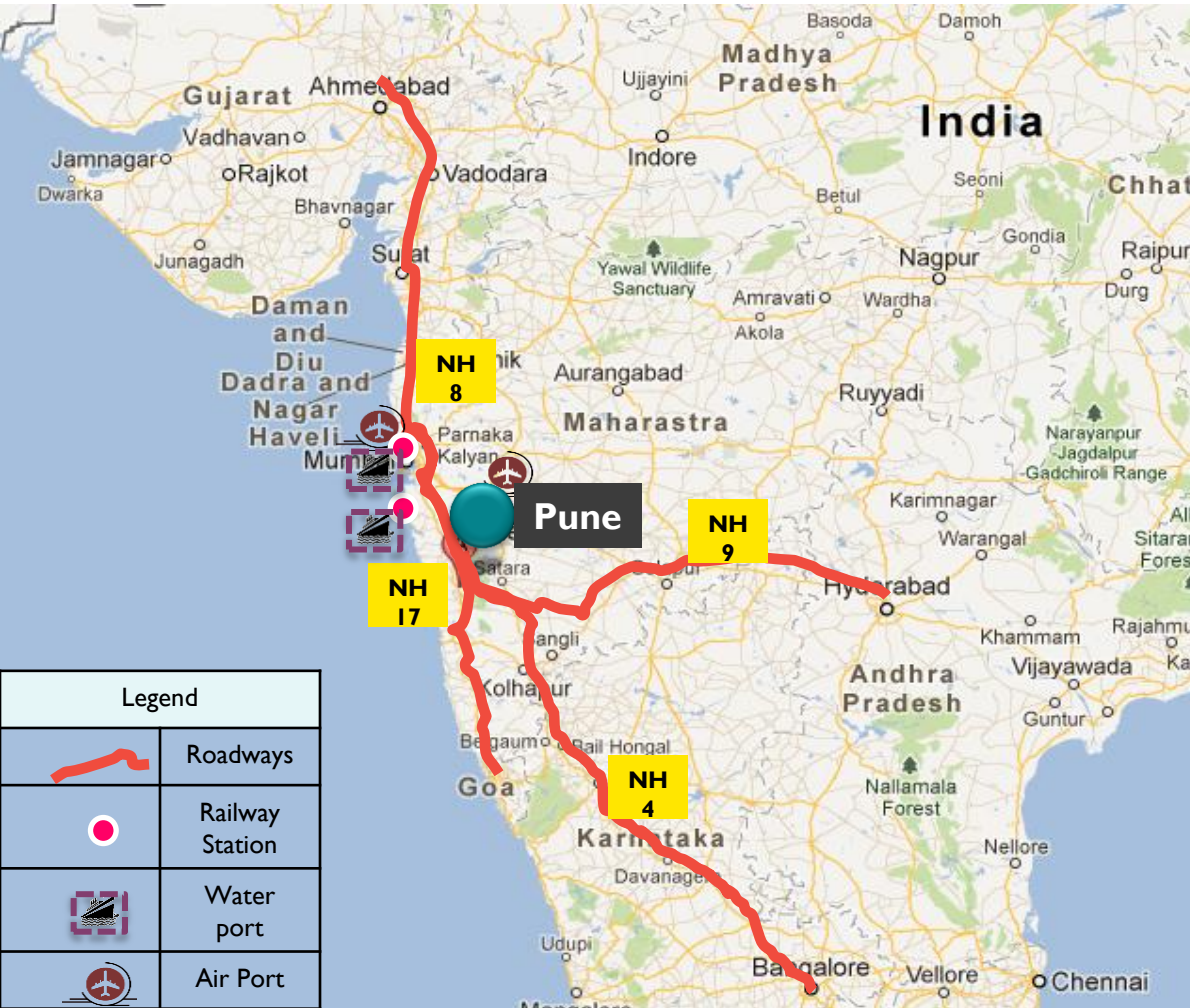
- ▶ Maharashtra Industrial Policy 2013
- ▶ Package Scheme of Incentives 2013
- ▶ Maharashtra SEZ Policy 2001
- ▶ National e-Governance Plan (NeGP)
- ▶ Maharashtra IT & ITeS Policy 2009



# The IT & ITeS Hubs *Hinjewadi, Pune*

# Hinjewadi, Pune

## External Connectivity



### Location Information

- ~8 Km from Pune city
- Established phases 1 & 2 of the Rajiv Gandhi InfoTech park

### Site connectivity

- Road : Located off Mumbai — Pune Expressway and 18 Km from Pune city
- Rail : Pune City (18 Km)
- Airports: Pune Airport (23Km)
- Water Port : Mumbai Port (150Km)

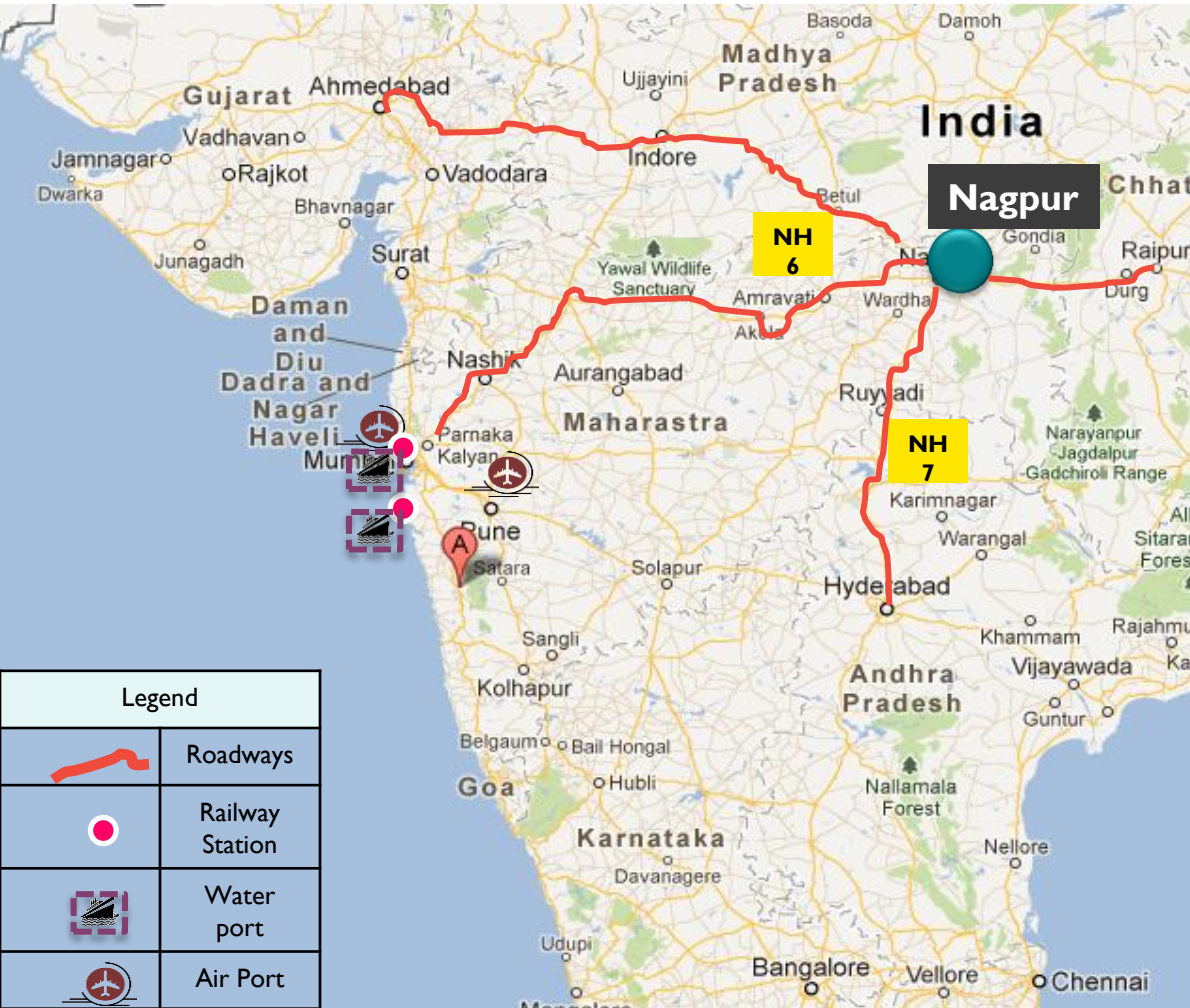
### Land Availability

- Total Area — 352 hectares
- SEZ Area — 223.56 hectares

# The IT & ITeS Hubs *Butibori*

# Butibori

## External Connectivity



### Location Information

- Butibori is located on Eastern region of the State near to Nagpur

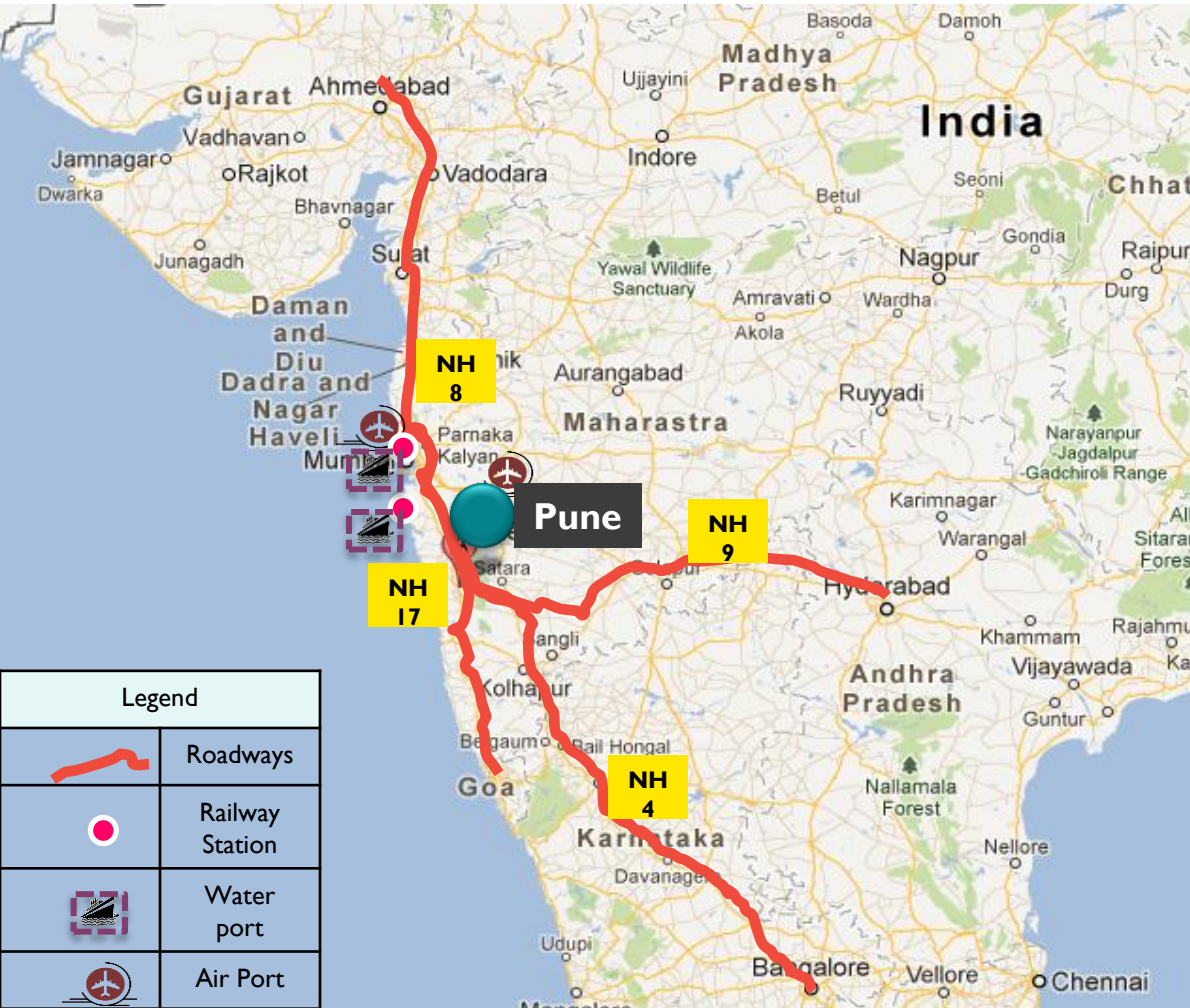
### Site connectivity

- Road : NH-7, 873 km from Mumbai, 731 km from Pune, 504 km from Aurangabad, 32 km from Nagpur
- Rail : Nearest, Butibori (7 km), Nagpur-Butibori (33 km)
- Airports: Nagpur (29 km) and International airport - Pune (726 km),
- Water Port : JNPT, 897 Km

# The IT & ITeS Hub *Kheda City, Pune*

# Kheda City, Pune

## External Connectivity



- ~50 Km from Pune city

### Site connectivity

- Road : Located off (NH-50) Pune – Nashik. 50kms from Pune city. 151kms from Nashik city
- Rail : Nearest, Chinchwad and Talegaon ( 35 Km ).And Pune (45 km)
- Airports: Pune Airport (50Km)
- Water Port : JNPT, 135 Km

# Key players



# Maharashtra IT/ITeS Sector Key Players



The Wipro logo, featuring a colorful, multi-colored circular emblem above the word 'WIPRO' in bold black letters, with the tagline 'Applying Thought' below it.	The Accenture logo, consisting of a small grey chevron symbol above the word 'accenture' in a lowercase, sans-serif font.	The Mahindra Tech logo, featuring a stylized 'm' in red and black, followed by 'Tech Mahindra' in bold black letters, and 'IT Services and Telecom Solutions' in a smaller font below.	The Infosys logo, with the word 'Infosys' in white, sans-serif font on a dark blue rectangular background.	The Honeywell logo, with the word 'Honeywell' in a bold, red, sans-serif font.	The i-flex solutions logo, featuring a stylized 'i-flex' in blue and red, with 'i-flex solutions' in a smaller font below.
The Patni logo, featuring a red square with a white circular pattern, followed by the word 'patni' in a lowercase, sans-serif font.	The IBM logo, consisting of the letters 'IBM' in a bold, blue, sans-serif font with horizontal stripes.	The Philips logo, with the word 'PHILIPS' in a bold, blue, sans-serif font.	The Syntel logo, featuring the word 'SYNTEL' in a bold, green, sans-serif font, with the tagline 'Consider IT Done' below it.	The Cognizant logo, featuring a stylized 'C' in blue and green, followed by the word 'Cognizant' in a bold, black, sans-serif font.	The Mastek logo, featuring a stylized 'M' in blue and red, followed by the word 'Mastek' in a bold, black, sans-serif font.
	The HP logo, featuring the letters 'hp' in a white, lowercase, sans-serif font inside a blue square.	The Microsoft logo, with the word 'Microsoft' in a bold, black, sans-serif font.	The HCL logo, with the letters 'HCL' in a bold, blue, sans-serif font.	The Tata Consultancy Services logo, featuring the word 'TATA' in a bold, blue, sans-serif font, with 'TATA CONSULTANCY SERVICES' in a smaller font below it.	

For further enquiries ..



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