# VISION DOCUMENT

# TELANGANA 2050: ENVISIONING INFRASTRUCTURE AND REAL ESTATE FOR THE FUTURE

March 2024

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*"Mega Master Plan shall aim to foster sustainable growth in the state of Telangana by the year 2050"*

MR. ANUMULA REVANTH REDDY
CHIEF MINISTER OF TELANGANA

# FOREWORD

CII Telangana is happy to release the White Paper on "**Infrastructure & Real Estate in Telangana: Current Scenario & Vision for Tomorrow"** with an aim to map the present scenario of the sector and the vision for the future.

In the dynamic landscape of Telangana, the realms of infrastructure and real estate play pivotal roles in shaping the trajectory of economic growth and societal well-being. As we embark on a journey towards a future characterized by innovation, sustainability, and inclusive development, the synergy between these sectors becomes increasingly crucial.

Our state is not merely a geographical entity; it is a canvas upon which we paint the aspirations of millions. The foundation laid by visionary leaders and the relentless efforts of the people have propelled Telangana into a realm of possibilities. Today, as we stand at the confluence of tradition and modernity, our approach to infrastructure and real estate must be imbued with a spirit of adaptability and foresight.

The infrastructural landscape must evolve to meet the demands of a burgeoning population and a thriving economy. Investment in smart cities, efficient transportation networks, and sustainable energy solutions will be the bedrock of our progress. Telangana envisions not just buildings and roads but interconnected hubs of innovation, where technology seamlessly integrates with daily life, enhancing the quality of living for all.

The real estate sector, as the physical manifestation of our dreams and aspirations, must embrace principles of sustainability and inclusivity. Affordable housing initiatives, green building practices, and urban planning that fosters community engagement will be the cornerstones of our real estate vision. We strive not only to construct structures but to create environments that nurture growth, wellness, and a sense of belonging.

In this journey towards a brighter tomorrow, collaboration is key. Public-private partnerships, community involvement, and harnessing the power of technological advancements will amplify our collective impact. Telangana's success story will be written not just by government policies but by the active participation of every stakeholder, from citizens to businesses, working hand in hand to shape our shared destiny.

The Paper offers a broad overview of the sector while touching upon key development and growth areas and recommendations to the stakeholders.

I take this opportunity to thank the CII Telangana Infrastructure and Real Estate Panel under the leadership of: **Mr. M Goutham Reddy**, MD & CEO, Re Sustainability Ltd.; **Mr. V V R Raju**, Managing Director, Gaja Engineering Pvt. Ltd; **Mr G Vamsi Krishna**, Joint Managing Director, Visaka Industries Ltd., **Mr. Maheep Singh Thapar**, Managing Director, ADAPT Technologies and other members of the panel. Thanks to the **CII Secretariat** for their immense coordination & support.

I also thank the **M/s Cushman & Wakefield** team for putting together this White Paper.

Thank you.

**C SHEKAR REDDY**
**CHAIRMAN, CII TELANGANA**

# VISION 2050 – THE MEGA MASTER PLAN

This white paper explores the intricate relationship between infrastructure development and real estate growth **in Telangana, drawing inspiration from Chief Minister Sri A Revanth Reddy's vision for the state's future.** The paper aims to assess various policy initiatives, identify critical areas of focus, evaluate the infrastructure and real estate landscape, and suggest innovative solutions to tackle emerging challenges within Telangana State.

The vision document for Telangana aspires towards creating a more sustainable, inclusive, and resilient ecosystem prioritising the well-being and prosperity of all its residents. Here are some key elements that such a vision document must encompass:

- **Sustainability:** The vision should emphasize sustainable development practices aimed at minimizing environmental impact, conserving natural resources, reducing carbon emissions, promoting renewable energy sources, and implementing eco-friendly transportation solutions.
- **Inclusivity:** The document may advocate for inclusivity by fostering diversity, promoting social cohesion, ensuring equal access to opportunities and services for all residents regardless of background or socioeconomic status, and addressing issues of poverty, inequality, and discrimination.
- **Resilience:** Building resilience entails preparing the city to withstand and recover from various challenges such as natural disasters, economic shocks, public health crises, and social disruptions. The vision document could outline strategies for enhancing infrastructure resilience, improving disaster preparedness and response capabilities, and strengthening community resilience through education, empowerment, and social support systems.
- **High Quality of Life:** Central to the vision would be the commitment to enhancing the overall quality of life for residents. This includes ensuring access to quality healthcare, education, housing, transportation, recreation, and cultural amenities. It also involves creating safe, clean, and vibrant neighbourhoods that foster a sense of belonging and well-being.
- **Smart and Sustainable Urban Planning:** Embracing smart city concepts and sustainable urban planning principles can help optimize resource allocation, enhance efficiency, and improve livability. This might involve integrating technology for better urban management, designing walkable and bike-friendly neighbourhoods, preserving green spaces and biodiversity, and promoting mixed-use developments that reduce commute times and enhance community interaction.

By articulating a vision that prioritizes sustainability, inclusivity, resilience, and quality of life, Telangana can set a clear direction for its future development and inspire collective action among government agencies, private sector stakeholders, civil society organizations, and the broader community to work towards common goals. The vision is rooted in a commitment to transform Telangana into a globally competitive and socially harmonious state. The vision statement shall reflect the unwavering commitment to creating a Telangana where opportunities are accessible to all, where innovation thrives, and where sustainable development is at the core of the state's progress.

# WHY TELANGANA?

Telangana is strategically located in the central part of India, providing easy access to major markets across the country. This central location can reduce transportation costs and improve logistics efficiency for businesses operating in and out of the state. Even though it is not located on the coastal line, Telangana's proximity to major ports like Krishnapatnam and Chennai allows businesses to access international markets through efficient transportation links, well connected and robust road and railway infrastructure enables efficient supply chain for the transportation of goods to inland markets.

**3.4%**
of India's Geographical Area (112,077 sq.km)

**4.8%**
of India's GDP (US$ 3.2 trillion)

**15%**
of India's notified SEZ

**3%**
of India's Population (35 Million)

**6th**
Export Preparedness Index 2022 (by Niti Aayog)

**2.5%**
of India's Foreign Direct Investment

**39%**
Urban Population – 3 Cities to be developed as smart cities

**28%**
of India's IT/ITeS Export

**2nd**
Hyderabad in Ease of Doing Business

### Facilitating Infrastructure

- With a major domestic and international airport at Hyderabad, the state government is planning to develop additional 3 airports to improve the connectivity and promote tourism for the different regions of the state.
- Life sciences cluster at Genome Valley on an area of 300 acres will boost the Hyderabad's Biotech ambitions
- Availability of extensive Road (1,09,259 km) & Rail Network (3,154 km).
- Facility of 4.7 GW installed power generation capacity providing 24x7 power supply. It is ranked 2nd in terms of solar power capacity per unit area of land mass. It has huge potential of 20.4 GW of solar energy and 4.2 GW of wind energy.

### Policy Support

- The policies are prepared to increase the investors attractiveness and to ensure the overall development of the state through decentralised industrialization. Specific policy framework for key sectors such as Power, Roads, Electronics, Data centres to facilitate optimum growth.

# 01

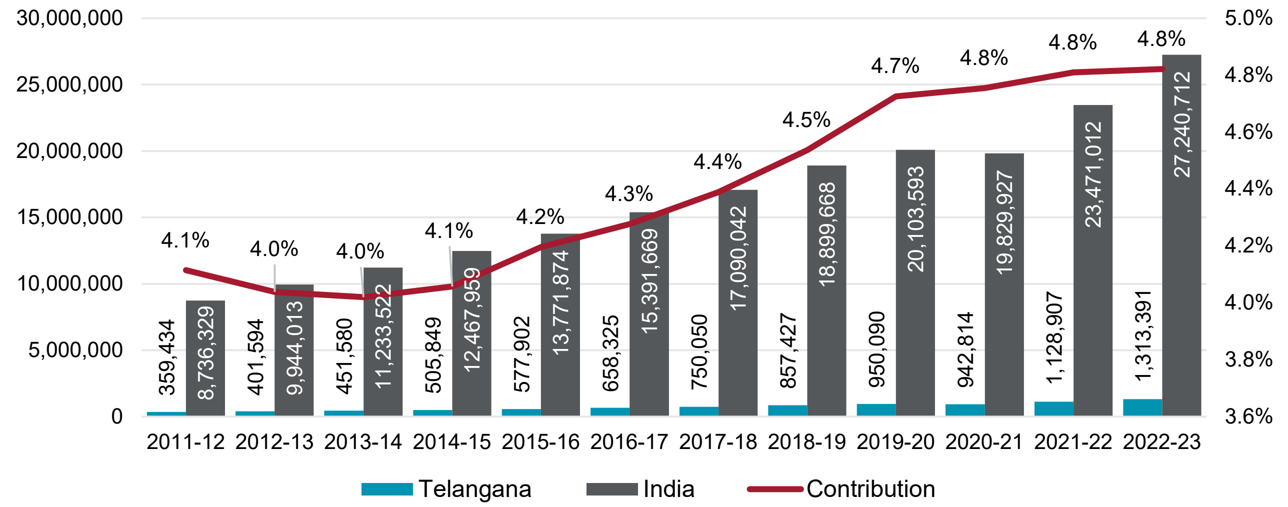
# TELANGANA: BRIDGING THE PAST TO SHAPE THE FUTURE

# BRIDGING THE PAST TO SHAPE THE FUTURE

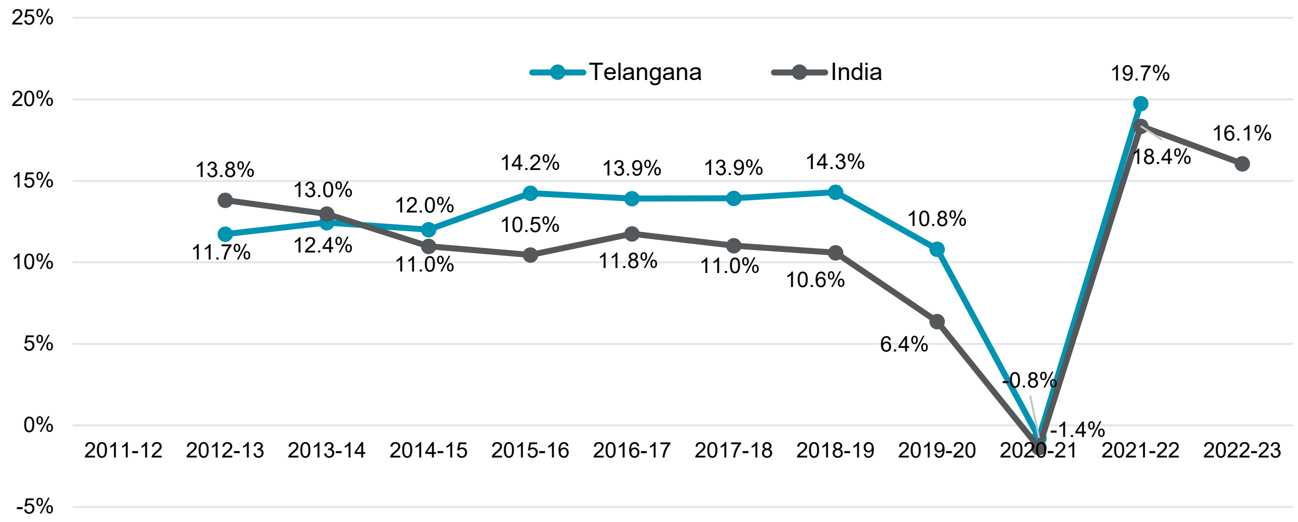
## STATE'S ECONOMY:

With a rich history and a projected Gross State Domestic Product (GSDP) of US$175 billion at current prices in 2023–24 (BE), Telangana is a state that has seen rapid growth in both infrastructure and real estate. The GDP growth rate of India was 2.4% lower than the state growth rate of Telangana. In 2023–2024, the per capita income is projected to be INR 3.43 lakh based on current prices.

**Contribution of Telangana's GSDP to India's GDP at Current Prices (in Rs. Crs.)**




**Growth Rate of GDP vs GSDP at Current Prices for India and Telangana**




Telangana's GSDP at current prices is expected to reach Rs. 13,13,391 crore in 2022–2023 (Provisional Estimates), growing at a rate of 16.3% faster than India's 16.1% growth. Telangana's per capita income

(PCI) in 2022–2023 is INR 3,12,398 at current prices, INR 1,40,122 more than the national PCI (INR 1,72,276). According to the Ministry of Statistics and Programme Implementation (MoSPI), Telangana placed third in PCI in 2022–2023.

The state's GSDP is mostly derived from the services sector. The Hyderabad IT Hub has promoted a vibrant international community of entrepreneurs and helped Indian firms become more successful. Telangana's exports of IT and ITeS increased at a CAGR of 15.44% to INR 241,275 crore (US$ 29.11 billion) in the fiscal year 2022–2023. Consequently, 9,05,715 IT professionals are employed by the state.

## HYDERABAD: UNSTOPPABLE GROWTH ENGINE SO FAR

Hyderabad was associated with peace and quiet in the 1990s, but in the late 1990s and early 2000s, things started to change. A spirit of competition was ignited by the government's strategy shift towards economic development and partnership with the private sector. Hyderabad's journey to becoming a thriving tech hub began with the creation of the first phase of the IT corridor in conjunction with L&T. Eminent firms such as K. Raheja Corp, Ascendas (now CapitaLand), DivyaSree, and DLF, in conjunction with multinational behemoths like Microsoft, Dell, Oracle, and Google, as well as indigenous IT titans like Infosys, TCS, Wipro, and HCL Technologies, was instrumental in establishing the esteemed "Brand Hyderabad" before the economic downturn. It may be noted that the local companies and agencies like STPI, CMC, Satyam Computers, Infotech Enterprises (now CYIENT), ILABS and many others played a critical role in this development too. Hyderabad is still expanding, making up ground lost during the global financial crisis and reinstating itself as a top investment destination despite difficulties during that period.

### *BUILDING REGULATIONS IN HYDERABAD*

It is critical to view Hyderabad's development narrative from several perspectives. Hyderabad has seen a rapid urban development in the last three decades and has emerged as a leader in innovation and urban reforms, which is a significant component of this transformation. The release of new building regulations (GO 86) in 2006 was one of the noteworthy actions. These were path-breaking and out-of-the-box reforms that led to the creation of new development zones in the periphery. Before this around 90% of the city growth was concentrated within the 172 sq. km of the erstwhile MCH area with 10% of the growth in the outlying municipalities. After these reforms, new types of development, IT precincts, gated communities, and large campuses came up in the peripheral areas leading to the decongestion of the core city and a new trajectory of growth that took Hyderabad to national as well as international levels. There was a drastic reduction in building deviations and legal cases from the earlier times. Compliance increased and enforcement became much easier. The core city which was low rise and medium rise now saw high-rise structures coming up in the peripheral areas.

The compulsory implementation of minimum road width, greater plot/site sizes, more parking space requirements, and higher impact fees as buildings grew taller and higher served as a counterbalance to this unheard-of boom. These factors brought in a semblance of control or regulation in a free market. Global investors, development, software, and pharmaceutical businesses became interested in these innovations and rushed to Hyderabad. Hyderabad was able to obtain the necessary skill pool, contemporary buildings and complexes/campuses, cutting-edge technologies for building management, and an internationally appealing skyline thanks to the government's backing and effective bureaucracy. So much so that other Indian cities desired to imitate the regulatory framework and growth story of Hyderabad.

Since most of these developments occurred in the periphery, the new building and development regulations introduced self-regulatory mechanisms, decongesting central city districts and lowering the number of unauthorized buildings and violations because the rules were clear and easy to follow. In addition to streamlining the process, other elements like the issuance of occupancy certificates (OC), which are subject to completion and compliance, the integration of fire safety regulations, and impact fees at the city level supported by online approval systems, not only generated a new urban form but also infused urban life with more vitality. MNCs gained confidence to enter the real estate market and make investments in a variety of economic sectors following the issuing of OC. There was a new level playing field created. In the market, the proportion of approved projects rose. To promote Transit Oriented Development (TOD), Metro Rail and ORR corridor/routes were designated as multipurpose use zones far ahead of their time, from 2006 to 2008. An overall framework for urban planning and implementation was created by incorporating supporting regulations into statutory master plans, land use zoning regulations, and land use laws. This gave the private sector's involvement a fillip and influx of domestic, international, and local investment more momentum. When seen in conjunction with the aforementioned factors including the licensing of builders, developers, and experts might be considered a prelude to RERA. This also increased the credibility of builders and developers. Today’s skyline of Hyderabad resembling that of leading global cities is also due to the immense contributions of local builders who rose upto the occasion and innovated and upgraded the real estate sector. Hyderabad's story of development and progress is consequently revolutionary and groundbreaking. After Mumbai, Hyderabad currently has the nation's second-highest concentration of tall structures.

## *GLOBAL CITY ASPIRATION*

Hyderabad has experienced a tremendous comeback in recent years. Thanks to affordable real estate (an outcome of the GO 86), a reduced cost of living, and significant advancements in social and physical infrastructure, Hyderabad is regularly rated as one of the greatest places to live. The benefits also extend to the real estate industry, as Hyderabad has been the world leader in office markets throughout the past two to three years. With office demand doubling from 5 mn. sq. ft to roughly 10 mn. sq. ft in just four to five years, the city has emerged as a prominent participant in the commercial office industry, competing with Bengaluru. Hyderabad is the first Indian destination for major corporations such as Apple, DBS, and IKEA, and three Fortune 25 businesses have their largest campuses outside of the US in Hyderabad. The city is the first Indian destination for major corporations such as Apple, DBS, and IKEA, and three Fortune 25 businesses have their largest campuses outside of the US in Hyderabad. Hyderabad makes up 12% of India's GCC talent pool and unit count. It draws traditional healthcare and pharmaceutical enterprises in addition to tech and engineering R&D firms.

Hyderabad is expected to rise from its current position as the fourth largest market in India to the third rank with an annual supply of 12–15 mn. sq. ft over the next three to four years. Hyderabad now has over 100 mn. sq. ft of office stock. The office stock in the city may double in the next ten years, making it the second-largest market in India by 2030. However because landlords compete fiercely, this expected surplus could cause a mismatch between supply and demand, which could decrease rents and potentially have an impact on institutional investors looking for steady, long-term profits.

With aspirations to become a real "global city," Hyderabad must overcome policy and infrastructure shortcomings for the next phase of development over the next 20-25 years to maintain its growing momentum. Concerns are raised about the city turning into a concrete jungle, consuming vast amounts of land and open space for development, and worsening the water crisis in the city and suburbs due to the average height of buildings rising as a result of residential redevelopment and the expansion of organized retail and commercial space. To prevent uncontrolled growth lessen the burden on current and future infrastructure, and continue to attract future growth the government must take proactive steps and out-of-the-box actions again to keep pace with the changing times and requirements of the fast-growing city of Hyderabad.

Hyderabad's future growth will come from strategic urban planning that prioritizes green areas, smart infrastructure, and sustainable development. One of the steps can be to consider government lands to be developed as green spaces, urban forests and recreational areas. There should be a full focus on creating biodiversity along with urbanization in line with other global cities of the world.  To transform the city into a worldwide innovation hub, research and development, innovation hubs, and startup-friendly environments should all be encouraged. Building a knowledge-driven economy through cooperation between the public, commercial, and academic sectors can draw talent and capital. The city may concentrate and bolster up-and-coming industries like biotechnology, renewable energy, and advanced manufacturing by expanding its economy beyond Technology.

The government should look into measures to encourage sustainable development practices for equitable growth. Hyderabad's long-term prosperity will depend on its capacity to strike a balance between environmental sustainability and economic expansion. A comprehensive and progressive approach to urban planning, infrastructure development, and environmental conservation is necessary if the city is to realize its potential as a global centre of culture and commerce. In the upcoming decades, Hyderabad may position itself for sustained prosperity and international recognition by adopting these concepts.

Significant actions that the state has recently taken will affect Hyderabad's and Telangana's future development. A few of the significant projects are listed below:

| Action items | Potential impact |
|---|---|
| Industrial Development Advancements | ▪ With over 1.5 lakh acres set aside only for industrial use, Telangana boasts the largest land bank.<br>▪ With more than 300 industrial parks, the state demonstrates its dedication to promoting industrial development. |
| Provision of Strategic Infrastructure: | ▪ The government has made water supply a top priority by starting 38 irrigation projects, including one flood bank, two major projects, 13 medium projects, and 22 renovations of already-existing projects.<br>▪ The Nehru Outer Ring Road (ORR), an 8-lane, 158-kilometer motorway with a top speed of 120 km/h, is another piece of the state's infrastructure |
| Promotion of Renewable Energy: | ▪ Telangana has effectively accomplished an installed power capacity of 16,621 MW, hence promoting renewable energy.<br>▪ The state has big plans to increase this capacity to 28,400 MW within the next four to five years.<br>▪ Telangana is a national leader in solar power, with 3,501 MW in 2018 ranking as the second-highest installed solar power producing capacity. |
| Acknowledging Technological Progress: | ▪ Telangana has demonstrated its embracing of technology by establishing a high-speed fibre network link. One crore houses now have optic fibre connectivity thanks to the Telangana Fibre Grid project, making modern communication services more widely available. |
| Thrust on Key Sectors: | ▪ The life sciences, pharmaceuticals, healthcare, information technology, electronics, defence, and aerospace industries are among the primary sectors in which the state has developed a strong ecosystem.<br>▪ Telangana's dedication to diversified and sustainable economic growth is emphasized by this strategic focus |

# 02

# TELANGANA GOVERNMENT'S MEGA MASTER PLAN

# GOVERNMENT’S MEGA MASTER PLAN VISION

The proposed Mega Master Plan 2050 for Telangana, as hinted by the Chief Minister, seems to be a comprehensive strategy aimed at achieving holistic development across the entire state. The key components and focus areas include decentralized industrial growth, social amenities, facilities, and housing, infrastructure development, Musi riverfront development, realignment and expansion of the metro, and airport addition and renovation. Overall, the Mega Master Plan 2050 for Telangana is expected to propagate a forward-thinking approach towards comprehensive development, emphasizing balanced economic growth, infrastructure enhancement, and quality of life improvement for residents across the state.

The state government aims to develop all the regions of Telangana apart from Hyderabad. The main objective is to expand industrial development in rural Telangana. Chief Minister announced the development of Telangana in three clusters Urban, Semi-Urban and Rural Clusters to encourage the establishment of industries. The Urban Cluster will be developed within the Hyderabad Outer Ring Road. The Semi-Urban Cluster will be developed between the ORR and the Regional Ring Road. Rural Cluster will be developed in the surrounding areas beyond the Regional Ring Road.

This plan not only aims to transform the city into a hub of modernity while preserving its historical charm but also link it with the overall development of the state. The government has proposed the creation of mini and microclusters within the city, which will serve as self-sustained units of living and working. This, coupled with the encouragement of pharma villages spread across the city around the ORR as Industrial clusters, will also create a thriving ecosystem that includes hospitals, educational institutions, and IT hubs. Pharma villages will be developed close to the radial roads and highways over an area of 1,000 to 3,000 acres each. The existing international airport is slated to be at the centre of the city, indicating a planned expansion towards the south. This strategic positioning will likely fuel real estate growth in the area, making it a potential hotspot for investors and homeowners alike.

Zaheerabad has been identified as the preferred cluster for development industries such as pharma, healthcare, food processing, sports, automobiles, along IT. Also, Hyderabad has the potential for the development of a manufacturing and production centre of defence and related equipment thus fostering an opportunity to attract investors and businesses interested in defence manufacturing, which can drive economic growth and create employment opportunities in the region.

The introduction of a new Solar Policy aimed at extending incentives for investors in the Solar energy sector. Such incentives could include subsidies, tax breaks, land allocation, and streamlined approval processes to encourage investment in solar power generation and related industries. This policy underscores Telangana's commitment to promoting renewable energy sources and achieving sustainability goals.

By identifying specific focus sectors and introducing supportive policies, the government aims to diversify the industrial landscape, attract investment, create employment opportunities, and promote sustainable development in Hyderabad, and across Telangana as a whole. These initiatives reflect a strategic approach towards fostering economic growth and harnessing the state's potential in various key industries. The vision to establish skill universities in Telangana reflects the government's commitment to addressing unemployment among educated youth and enhancing the state's workforce, resulting in positioning Telangana as a hub for skilled talent capable of thriving in the competitive global marketplace.

# 03

## INFRASTRUCTURE & REAL ESTATE: EXPLORING KEY ASPIRATIONAL AREAS

# EXPLORING KEY ASPIRATIONAL AREAS

## CURRENT STATE OF INFRASTRUCTURE AND REAL ESTATE

Recent years have seen a fast infrastructure development in Telangana, especially in Hyderabad. There have been notable advancements in the state and city in several areas, including information technology, healthcare, transportation, and education. Telangana's infrastructure, especially that of Hyderabad, is characterized by continuous attempts to improve and modernize in several sectors, which support the region's overall development and advancement.

Telangana's infrastructure development initiatives have ushered in a new era of economic prosperity. The enhanced connectivity, reliable power supply, and digital infrastructure have attracted domestic and international investments, fostering a business-friendly environment. This, in turn, has led to increased industrialization, job creation, and a rise in per capita income.

## DRIVERS OF ECONOMY:

Telangana, like any other state, experiences varying levels of development across its districts. The progress and development of a district are influenced by factors such as infrastructure, education, healthcare, industrialization, agriculture, and governance. The State comprises 33 districts covering an area of 1,12,077 sq. km. Here are some districts that contributed to the overall development of a state:


Rangareddy and Medchal-Malkajgiri: These districts, adjoining Hyderabad, have witnessed rapid urbanization and industrial development. The Information Technology and Business Districts (ITBD) and various industrial zones in these districts have played a key role in the economic progress of the state.

Karimnagar and Warangal: These districts have historically been significant in terms of agriculture and industry. The Warangal-Hyderabad Industrial Corridor has been a major initiative aimed at boosting industrial growth in the region.

Khammam and Nalgonda: These districts are known for their contribution to the state's economy through agriculture and industries. Nalgonda has a significant presence in the cement industry.

Mahbubnagar: Known for its agricultural activities, Mahbubnagar has been contributing to the state's economy through its role in food production and related sectors.

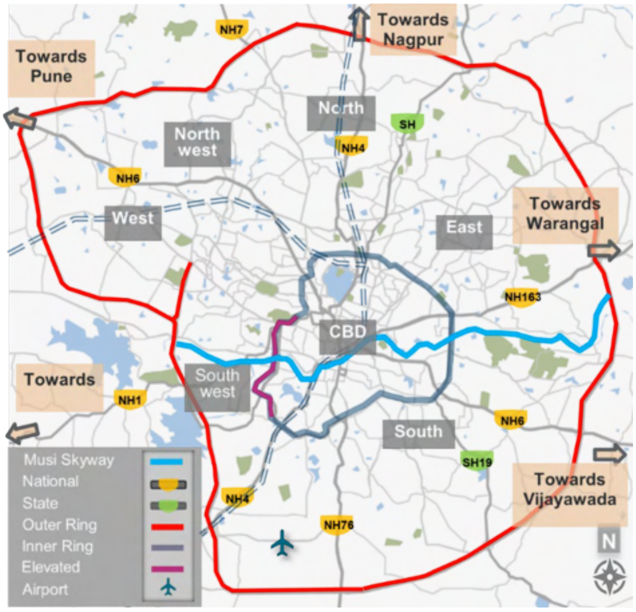
One of the prominent infrastructure development initiatives undertaken by the State government is the "Hyderabad Growth Corridor" or the "Hyderabad Pharma City" project. This initiative is expected to have a significant impact on the state's economy.

# HYDERABAD CITY DYNAMICS:

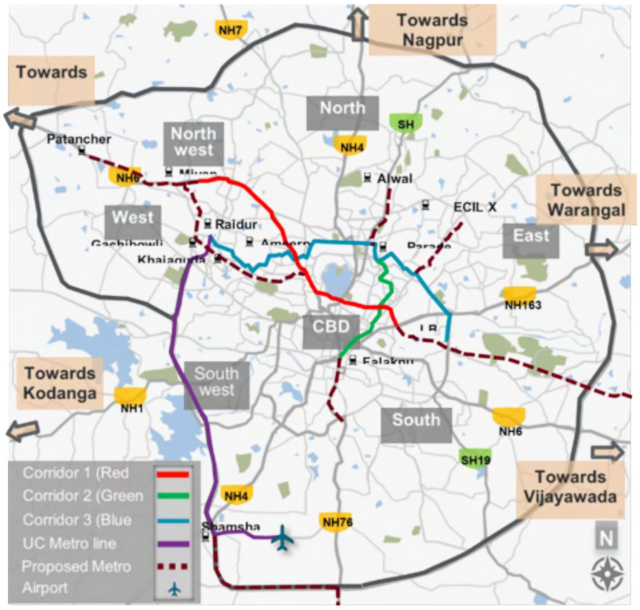

Hyderabad, the capital city of Telangana, epitomizes a dynamic blend of historical richness and modern economic prowess. Recognized as a major economic & IT hub, the city is home to HITEC City, a thriving IT and business district. Its historical landmarks coexist with rapid urbanization and smart city initiatives, showcasing a unique synthesis of the old and the new. The city's intellectual capital is fortified by prestigious educational institutions, while its prominence in the biotech and pharmaceutical sectors adds to its multifaceted dynamism. Hyderabad consistently scores high in quality-of-life indices, reflecting the success of its urban development and amenities.

**1/3rd** Hyderabad accounts for of the vaccines produced globally

**2.2X** IT Exports growth compared to national average



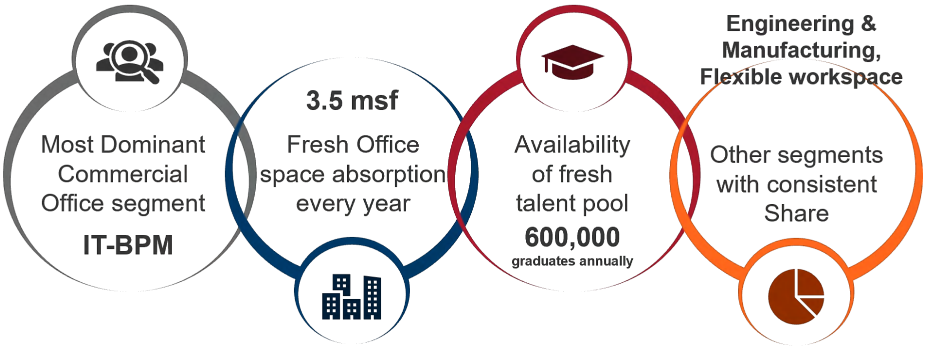

Hyderabad Metropolitan Development Authority Zoning Area Layout




Existing, Under Construction and Proposed Metro Connectivity of HMDA

## *HYDERABAD MARKET*

**Office Market Scenario:** Commercial real estate trends in Hyderabad have showcased stability and positive growth, with a steady demand for quality office spaces. Real estate developers continue to invest in modern and sustainable office buildings to meet the evolving needs of businesses.




Note: Others include Gaming, Telecom & Media, Chemicals, Logistics & E-commerce

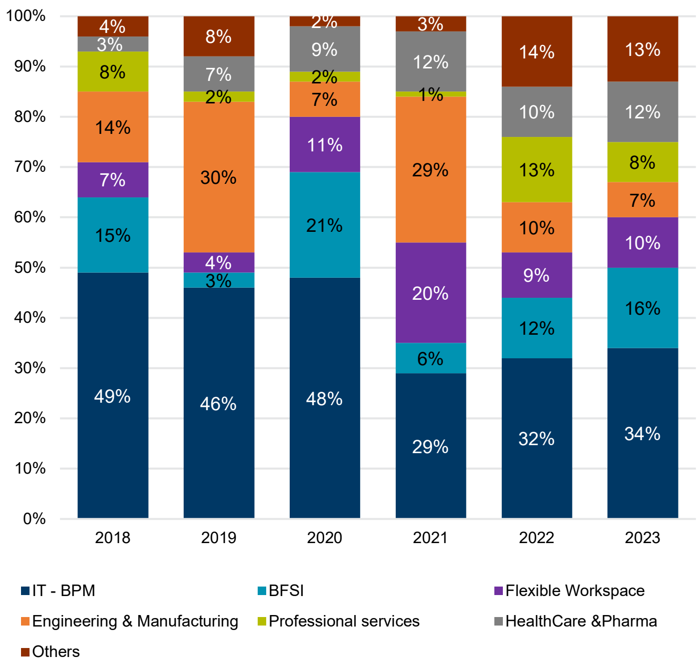
Hyderabad has a total office stock of approx. 95 mn sq. ft and 95% of the Grade-A stock is concentrated in the city's western corridor in Madhapur and Gachibowli submarkets. Madhapur has emerged as a preferred location for information technology companies due to the presence of high-quality new Grade-A office spaces, while Gachibowli has become the destination for campus-style developments due to the availability of larger land options.

During 2017-2019, occupiers such as Qualcomm, Microsoft, Wells Fargo, Amazon, and Google took up large spaces, encouraging local, national, and foreign developers/investor communities to build high-quality Grade-A projects to facilitate this growing office demand.

The city recorded an average annual net absorption of over 5 mn sq. ft during the period 2019-2022 - even during the times of COVID-19 pandemic; thereby consolidating its position as the most preferred destination. The supply addition remained buoyant averaging at approx.10 mn sq. ft annually. In H1 2023, the city outpaced Bengaluru to record the highest net absorption across all the office markets in India at approx. 3.1 mn sq. ft.

The persistent supply addition, however, has adversely affected the city's vacancy levels to breach the 20% mark in 2022; with the market recording the second highest vacancy (marginally lower than NCR) compared to India's other office markets. The Grade A Weighted Average Rent in Hyderabad which recorded a dip in 2020 remained range bound till 2022; however, recorded a major increase in H1 2023 due to high demand levels.

**Segment Split of Office Absorption**



## GROWTH DRIVERS:

Continued focus on key growth drivers requires proactive infrastructure development around existing and planned institutions, generating real estate demand for residential, commercial, and hospitality segments. The Telangana State Industrial Infrastructure Corporation Limited (TSIIC) has identified some of the thrust area sectors that are targeted to be developed in the upcoming future are as follows:

### *PHARMA VILLAGES:*

The state government has envisioned the Hyderabad Pharma City project to develop multiple Pharma villages spread across the state of Telangana instead of creating an accumulated cluster of Pharma City while retaining the focus on Research & development as well as Manufacturing. They intend to serve the needs of the people effectively and help the growth of the economy of the state through decentralised industrialization. The nine districts that are currently envisioned to be developed as Pharma villages are Rangareddy, Sangareddy, Vikarabad, Mahabubnagar, Medchal-Malkajgiri, Siddipet, Yadadri-Bhuvanagiri and Nalgonda. Importantly the new vision talks about including the areas within Outer Ring Road (ORR) as Urban Zone, areas within ORR and Regional Ring Road (RRR) as peri-urban zones and the areas outside of RRR as Rural zones as a new paradigm of development planning in an integrated manner keeping the overall development of state in mind. Smaller manageable Industrial urban clusters are being suggested with a vision to develop walk-to-work neighbourhoods

### *AEROSPACE & DEFENCE:*

Hyderabad has a strong presence of defence PSUs, and scientific & technological institutes along with R&D agencies – ARCI, DRDO, etc. As per the FDI Intelligence’s Aerospace Cities of the Future 2020/21 ranking, Hyderabad was ranked number one under the category of Top 10 Aerospace Cities in Cost-Effectiveness. The state government has developed 4 dedicated Aerospace parks, 2 hardware parks and 50 general engineering parks which are provided with high-quality infrastructure for the precision engineering industry. Additionally, 2 more Aerospace and Defence parks are being developed currently. The Aerospace parks and Hardware parks are Adibatla Aerospace SEZ, Nadergul Aerospace Park, GMR Aerospace SEZ, Adani Aerospace Park, HW Park 1 and HW Park 2. With the presence of 1000+ defence manufacturing units and their continuous expansion is developing a self-reliant ecosystem

### *LIFE SCIENCES:*

Hyderabad is the bulk drug and vaccine capital of the country. There is an urge to focus on developing new infrastructure to target emerging life-science areas and opportunities like life-saving drugs, new vaccines and biological apart from the maintenance of the bulk drug productions.

### *IT HARDWARE (INCLUDING BIO-MEDICAL DEVICES, ELECTRONICS, AND CELLULAR COMMUNICATIONS):*

Telangana is known as a prominent IT hub with a robust IT Software sector complementing the IT Hardware sector. The government has approved an IT Investment Region and two Electronic Manufacturing clusters.

### *FOOD PROCESSING AND NUTRITION PRODUCTS INCLUDING DAIRY, POULTRY, MEAT, AND FISHERIES:*

Telangana is a large producer of agro products like cereals, pulses, oilseeds, fruits, and spices. It is the market leader in the poultry and seed business. Greenhouse and exotic vegetable cultivation holds the potential to expand further in Telangana. There is a need to encourage this sector, to add value to agro-products and expand the National Food Processing Mission. Siddipet Industrial Park is currently in the process of being developed as an Industrial Park with a focus on food and agro-processing units.

## *AUTOMOBILES, TRANSPORT VEHICLES, AUTO-COMPONENTS, TRACTORS AND FARM EQUIPMENT:*

The automobile industry is one of the major industrial sectors in the country. The presence of upstream and downstream suppliers in the state will enhance the overall SME sector as well. The presence of the M&M tractor plant in Telangana shall drive the demand for future growth and investment in this sector.

## *TEXTILE AND APPAREL:*

Telangana is the third highest producing cotton-producing state in India. Of its suitable geographical location with access to a large consumer market and the presence of a conducive environment for new entrants and foreign investments, the state holds tremendous potential to expand further in this sector. Kakatiya Mega Textile Park is currently under construction and is aimed to focus on this sector considering the demand of the sector. Apart from the textile industries, paper and paper products industries are growing rapidly to cater to the demand for such products.

## *PLASTICS AND POLYMERS, CHEMICALS AND PETRO-CHEMICAL, GLASS, AND CERAMIC:*

Telangana is one of the leading states for manufacturing moulds and tooling for FMCG products. Telangana has a strong presence in the plastics industry with about 6,000 units operating in the State, of which about 90% are MSMEs. The organized plastics sector employs more than 1+ lakh people.

India will be investing Rs 40 crore (US$ 6.2 million) to increase the domestic production of plastics across various plastics parks. This shall support the development of the industrial growth in the plastic and polymer sector to attract investors. These industries contribute to a turnover of over Rs 6,000 crore. The production capacity is 9 lakh metric tonnes. Of these 6,000 units, 28% are micro, 55% are small, 15% are medium and the remaining 2% are large-scale companies.

## *FMCG AND DOMESTIC APPLIANCES:*

FMCG is the 4th largest segment in India with a phenomenal growth rate. Considering the geographical locational advantage of the state and the transportation cost being a critical factor, this sector needs to be developed in the state through the new Meet or Beat policy to gain a competitive advantage over India.

## *ELECTRIC VEHICLES (EVS):*

The State government has prepared an Electric Vehicle and Energy Storage policy with a vision to make Telangana a hub for Electric Vehicles and Energy Storage Systems. It offers both fiscal and non-fiscal incentives to promote the adoption of EVs across manufacturers, service providers and consumers. It aims to provide benefits to the manufacturer, put in place the support infrastructure as an enabler for the usage of the new mode of transport and bring in huge investments to the state. The investment and employment opportunity shall come from battery requirement, EV manufacturing and infrastructure services such as the provision of EV charging stations. EV, ESS and Electronics Dedicated Manufacturing Clusters of approximately 1,600 acres of Industrial Land have been proposed close to the City & Airport.

## *GEMS AND JEWELLERY:*

Hyderabad is known for its pearls and lacquer bangles made by the local artisans. Hyderabad Gems SEZ has 75-100 diamond, jewellery, and jewellery-watch manufacturing units, besides a training centre for manufacturing jewellery and cutting and polishing of diamonds. It is the destination for manufacturers, businessmen and entrepreneurs in the field of gems & jewellery for both gold & diamonds. There is a need for value addition to these traditional products and diversification of the other gems and jewellery items shall grow the demand for this sector within the state.

## *WASTE MANAGEMENT AND GREEN TECHNOLOGIES:*

Telangana has vast potential in waste management and new green technologies with the increasing demand by all industries. The state has a functional model of SPV/ JV efforts of waste management as an enabler for the expansion of this sector.

## *RENEWABLE ENERGY AND SOLAR PARKS:*

Telangana has huge potential supported by large land banks suitable for the installation of non-conventional and renewable energy installations. The Solar power installed capacity of the state is 4,712 MW and needs to be expanded further.

## *MINERAL-BASED AND WOOD-BASED INDUSTRIES:*

Telangana has one of the largest coal deposits among the southern states of India. Telangana is the leading producer of barytes, dolomite, feldspar, laterite, limestone, Quartz, and Sand (others). Minerals such as granite, quartz and silica-sand are currently being utilized within the state and need to be exported to generate a better economy. Similarly, bamboo and other suitable plant materials need to be targeted to generate sustainable income and further help in reducing the cutting down of forest trees.

## *TRANSPORTATION/ LOGISTIC HUB/ INLAND PORT/ CONTAINER DEPOT:*

Considering the central location of the state, it holds tremendous potential to be developed as a major transit and logistic hub. Two major logistic parks at Mangalapally and Batasingaram in Hyderabad are currently supporting the needs of the thrust area sector industries.

## *AIRPORT EXPANSION AND ENHANCED AIR CONNECTIVITY:*

Expanding the existing international airport terminal capacities and runway capacities, towards the south can be complemented by planned real estate development, creating a comprehensive airport city with commercial and residential zones.

Apart from the expansion of the International Airport in Shamsabad, Hyderabad, the state government has plans for the establishment of 3 greenfield airports and 3 brownfield airports. The locations of the proposed green field airports are Bhadradi Kothagudem, Jakranpally (Nizamabad district), and Mahabubnagar (Gudibanda village). These locations are targeted to address the underserved locations, enhance the accessibility to tourists and boost the local economy. The locations of the proposed Brownfield airports are Warangal, Adilabad and Basanthnagar (Pedagally district). These existing airports are chosen to be developed as they hold the potential to act as feeder airports to connect the smaller towns to the major hubs. The Airport Authority of India has approved the technical feasibility for the development of airports in 3 locations i.e. Warangal, Adilabad and Jakranpally.

## KEY POLICY CONSIDERATIONS:

### *TRAFFIC CONGESTION:*

Addressing traffic congestion requires a multi-pronged approach, including improving public transport, promoting cycling and walking, and leveraging technology for traffic management.

Telangana state government has announced to focus on the traffic management of Hyderabad in terms of the following:

1. Comprehensive planning to address the traffic congestion and nuances
2. Undertake a Feasibility Study for the need to construct Underpass, Subways etc.
3. Upgradation of City Traffic Police Stations
4. Recruitment of Home Guards to address the shortage of personnel
5. Encouragement of Multi-level Car Parking on both Private and Government Plots

### *WATER, SEWERAGE, STORMWATER, DRAINAGE, SOLID WASTE, ELECTRICITY AS BASIC INFRASTRUCTURE:*

Prioritizing investments in water and electricity infrastructure, improving waste management, and ensuring efficient basic services are critical for enhancing quality of life and attracting real estate development. Both quantity and quality of these services need to be ensured as these are the backbone for supporting all development and quality of life. Further impetus on stormwater drainage, flood management and sewage/sullage management should remain at the highest priority. As the city grows in size and population the total generation of solid waste is reaching gargantuan proportions. The state government has already initiated the identification and development of waste processing sites of huge scale on all four cardinal directions of the city.

Krishna-Godavari water schemes can be linked with the water demand for Hyderabad.

The state government has undertaken 42 electricity generation (21 renewable energy and 21 non-renewable energy) projects, 13 electricity distribution projects and 10 electricity transmission projects. Some of the prominent projects are the Bhadradri Thermal Power Station Project, Telangana Super Thermal Power Project, DDUGJY Power Distribution Project, Hyderabad Power Transmission Project and Transmission System for Kurnool Wind Energy Zone/ Solar Energy Zone.

## INDUSTRY EXPECTATIONS:

### *EASE OF DOING BUSINESS (EODB):*

Simplifying regulations and streamlining approvals can boost investor confidence and accelerate real estate development. India holds 63$^{rd}$ rank globally and Hyderabad holds 2$^{nd}$ rank in India as per Ease of Doing Business Ranking 2019. The parameters considered for analyzing the EoDB are:

- Starting a Business,
- Registering Property,
- Dealing with Construction Permits,
- Getting Electricity,
- Getting Credit,
- Paying Taxes,
- Trading Across Borders,
- Protecting Minority Investors,
- Enforcing Contracts and
- Resolving Insolvency

## *QUALITY OF LIFE:*

Hyderabad already scores high on many parameters of quality of life and affordability. Ensuring that rapid growth is balanced with sustainable development and preservation of the natural environment remains a challenge for all global cities.

## *NET ZERO CARBON CITY:*

Targeting the global agenda of achieving the status of Net Zero Carbon Cities requires a radical reduction of GHG Emissions from urban activities and the atmosphere. It aims to reduce the urban demand for energy and materials through integrated urban spatial planning, increasing single-sector efficiency, and focusing on green infrastructure. It needs to turn the supply to net zero carbon, electricity, fuel, and materials and enhance the urban carbon uptake and stocks.

## *ESG COMPLIANCE:*

Encouraging green practices and sustainable development in real estate projects can attract environmentally conscious investors and contribute to a better quality of life. GHMC has already registered with the IGBC recommendation for the green city rating. So, there is an active effort by the state government to focus on the sustainable development of the built environment. Hyderabad city should go for green in all dimensions.

The World Economic Forum has strategically laid down the actions that need to be carried out by the cities and local governments. These key actions can be considered as a benchmark to make the state of Telangana ESG compliant. The actions required have been mentioned below in further detail-

- **Environmental**
  - Regulations: Accelerate the formulation and adoption of regulations that reduce emissions across different sectors such as mobility, energy, water and waste
  - Strategic planning: Integrate net-zero and other core environmental objectives into strategic city planning such as city masterplans
  - Service provision: Ensure adequate and timely provisioning of services that help the city achieve net-zero targets
- **Social**
  - Regulations: Develop policies and regulations to promote local social cohesion and the inclusivity of vulnerable groups
  - Strategic planning: Address local social issues by incorporating them into local strategic plans with a clear implementation plan and tangible actions
  - Service provision: Ensure adequate and inclusive provision of municipal services to all members of society
- **Governance**
  - Ecosystem governance: facilitating partnerships between different stakeholders such as civil society groups, non-governmental organizations, international multilateral organizations as well as private sector and other governmental entities.
  - Transparency and accountability: ensuring transparency and accountability in the actions taken through timely and open communication of city decisions, budgets and progress updates.

- Financing and funding: ensuring the efficient allocation of financing and funding to projects and initiatives that promote socio-economic development and environmental protection.
- Supply chain management: adopting supply chain management policies (e.g. procurement policies) that consider the social and environmental impact of suppliers.
- Monitoring and oversight: providing effective oversight and monitoring of the performance of the city across different environmental and social parameters.

# DECENTRALIZATION AND URBAN PLANNING:

## *BENEFITS AND CHALLENGES:*

Analysing the pros and cons of decentralized industrialization and urbanization is crucial for informed policy decisions.

- **Industrial Decentralization:** The state government plans to spread industrial development across the states to distribute the overall economy both in urban and rural areas. Telangana has established industrial parks and clusters in various regions to distribute industrial activities and encourage economic development beyond the major urban centres. This approach aims to reduce regional disparities and create employment opportunities in diverse locations. The state has been promoting sector-specific growth in different districts, ensuring that each region specializes in industries that align with its strengths.
- **Urbanization:** Telangana has emphasized inclusive urban planning, aiming to provide amenities and services to all sections of the urban population. This includes the development of green spaces, cultural centres, and recreational areas. Telangana has been working on improving transportation links to ensure seamless movement of people and goods. The state government has facilitated various skill development programs to equip the urban workforce with the skills required for emerging industries and the evolving job market.

## *RRR INDUSTRIAL ZONES:*

- Creating dedicated industrial zones along the RRR can attract investments and promote planned real estate development around these clusters.
- Telangana State Government has proposed 500-1000 acres of land parcels between ORR and RRR for the Industrial development. These industrial zones shall be located within 50-100 km away from the airport, and national and state highways. The land that will be acquired for these industrial zones shall be dry and non-cultivable to ensure that the farmers do not get affected and the scope of pollution is minimized. Such land parcels would have minimum cost and the locals would be supportive of the acquisition and development of the region.

## *TOURISM AND NIGHTLIFE:*

- Revitalizing Musi, promoting boating, and fostering nightlife can enhance tourism and create new opportunities for leisure and entertainment-driven real estate. The Musi Riverfront development project shall span for 55 km stretch from Vikarabad. It is envisioned to be developed in a PPP mode to create a unique amusement park. It shall contribute to the development of various sectors such as tourism, transportation, economic zones, industrial parks, social and physical infrastructure etc. This goes in tune with the global acceptance of tourism as a major economic generator and also aligns with the

Govt of India's thrust on this subject in its recent interim budget

- The state government has also identified four different locations for the development of Waterfront Clusters as an “Idyllic World Class Weekend Mega Destinations”
- The Ministry of Tourism has identified to development of Eco-Tourism Circuits under the Swadesh Darshan Scheme which shall help in the promotion and development of the State as well as the country.
- Hyderabad's blend of tourism and nightlife (such as the Laad Bazaar near Charminar, a nightlife scene with numerous food courts, street food zones, bars, lounges, and clubs scattered across the city) offers visitors a dynamic and enriching experience, combining historical exploration, culinary delights, entertainment, and cultural immersion into one vibrant cityscape.

## LAND ACQUISITION AND AFFORDABLE HOUSING:

### *TSIIC'S ROLE:*

- Empowering TSIIC (Telangana State Industrial Infrastructure Corporation) to plan and acquire land for future needs, including affordable housing projects, can ensure proactive and strategic development.
- Telangana is ranked 1st in the Aerospace Cities of the Future 2020-21 Ranking
- Hyderabad is the best city to live in India as per Mercer’s ranking
- Meet or Beat Policy for Megaprojects

### *RADIAL ROADS AND LAND IDENTIFICATION:*

Identifying land parcels near radial roads for economically weaker section (EWS) housing can be facilitated through open auctions, PPP models, or barter systems.

### *DISPERSAL STRATEGY:*

Implementing a 'look east' policy, similar to other cities, where a percentage of land converted for commercial use is allocated for affordable housing, can promote inclusive growth.

## REAL ESTATE: KEY GROWTH SEGMENT:

Considering the rich history and high potential of Telangana state, the real estate sector in Hyderabad that could grow in the next 20 -30 years has been discussed below.

### *GLOBAL BUSINESS DISTRICTS:*

Hyderabad could evolve into a global business district, attracting multinational corporations and fostering an international business environment. Development plans may prioritize creating world-class office spaces, meeting international standards, and offering state-of-the-art facilities to cater to the needs of global enterprises.

### *INNOVATION AND TECHNOLOGY HUBS:*

Building on its success as a tech hub, Hyderabad could further diversify into innovation and technology hubs. Collaborative spaces for research and development, incubators, and accelerators could attract startups and emerging tech companies, driving demand for flexible office spaces. Foster the growth of education and innovation hubs by incentivizing the establishment of research institutions, technology parks, and innovation centres. This can attract a skilled workforce, stimulate economic activity, and contribute to the city's reputation as a knowledge hub.

### *DATA CENTERS*

Telangana is the first state to introduce a Data Centre Policy. The state government has plans to develop a data centre campus as an infrastructural provision for the emerging need for data centres. Both public and private entities are showing interest in developing their facility within the campus. Currently, 36MW is in operation under 6 data centers with 3 upcoming data centers shortly. This segment will have its definitive regulation as a part of the development guidelines.

### *CULTURAL AND RECREATIONAL SPACES:*

To create a vibrant and attractive city, there might be a focus on developing cultural and recreational spaces. This could include art districts, museums, parks, and entertainment complexes, adding to the overall appeal of Hyderabad as a destination for residents and visitors alike.

### *MIXED-USE DEVELOPMENTS:*

Future real estate projects could focus on creating integrated communities with mixed-use developments, combining residential, commercial, and recreational spaces. This approach enhances the live-work-play concept, offering residents and businesses a holistic and convenient lifestyle.

### *AFFORDABLE HOUSING:*

Recognizing the importance of affordable housing, future real estate developments may include initiatives to cater to a broader spectrum of the population. A policy framework should be proposed to encourage developers to focus on affordable housing projects, addressing the housing needs of a growing population. Government policies can focus on promoting affordable housing by providing subsidies, tax breaks, or land incentives to developers committed to building affordable residential units. This could address the growing demand for housing among various income groups in the city and also enable balanced growth across all sides of Hyderabad.

In summary, the future growth of the real estate sector in Hyderabad hinges on a multifaceted approach that includes technological innovation, sustainable practices, urban planning, and a strategic focus on creating vibrant, integrated communities. As the city progresses, balancing growth with environmental considerations and the well-being of its residents will be crucial for long-term success. By adopting a comprehensive and adaptive approach encompassing these strategies, the government of Hyderabad can lay the foundation for sustainable, inclusive, and resilient growth in the real estate sector over the next three decades. This forward-looking approach will position the city as a model for balanced urban development and a global player in the real estate landscape.

### *WATERFRONT REDEVELOPMENT:*

Leveraging natural assets, such as water bodies, for redevelopment can enhance the aesthetic appeal and value of certain areas. Transforming waterfronts into recreational zones, mixed-use developments, or cultural spaces can contribute to the city's charm and attractiveness. Many global cities now lay huge emphasis on placemaking, including liveliness and vibrancy in the city areas.

# 04

## INNOVATIVE SOLUTIONS & CASE STUDIES

# INNOVATIVE SOLUTIONS & CASE STUDIES

## INTEGRATION OF TECHNOLOGY FOR SMART INFRASTRUCTURE AND SUSTAINABLE REAL ESTATE

### *DIGITAL TRANSFORMATION:*

E-governance measures and upgrading various online approval systems, civic services management and user interface and making them faster and more efficient. The government should support this by improving internet access and bandwidths using 5G/6G networks. By embracing innovation and digitalization, Hyderabad continues to position itself as a dynamic and future-ready city in the digital age.

### *SUSTAINABLE DEVELOPMENT:*

With a growing emphasis on sustainability, the real estate sector in Hyderabad may see a surge in eco-friendly and energy-efficient buildings. Developers might incorporate green technologies, renewable energy sources, and environmentally conscious design to meet the rising demand for sustainable living and working spaces. Implementing policies that provide incentives for sustainable and green building practices can encourage developers to incorporate eco-friendly features. This may include tax benefits, expedited approvals, or reduced fees for projects that meet specified environmental standards.

### *SMART CITIES INITIATIVES:*

Embracing smart city concepts can be a key driver for real estate growth. The integration of advanced technologies, such as IoT (Internet of Things) for urban planning, smart grids, and intelligent transportation systems, could enhance the overall quality of life and attract both businesses and residents. Expanding and refining smart city initiatives can contribute to the overall growth of the real estate sector. Policies supporting the integration of technology for smart infrastructure, transportation, and governance can enhance the city's competitiveness and appeal.

## PROPOSING INNOVATIVE SOLUTIONS TO ADDRESS EMERGING CHALLENGES

### *SMART AGRICULTURE AND WATER MANAGEMENT:*

Implement precision agriculture techniques, leveraging IoT devices and sensors for real-time monitoring of soil health, weather conditions, and crop status. Introduce smart irrigation systems that optimize water usage based on the specific needs of crops, reducing water wastage.

### *DIGITAL HEALTHCARE:*

Establish a robust telemedicine network to provide healthcare services in remote areas, improving accessibility and reducing the burden on urban healthcare facilities. Implement health information exchange systems to streamline the sharing of patient information among healthcare providers, improving coordination and patient care.

### *RENEWABLE ENERGY INITIATIVES:*

Promote the adoption of solar energy in both urban and rural areas, encouraging the installation of solar panels on rooftops and unused land. Develop policies to attract investments in wind and solar energy projects, fostering sustainable energy practices and reducing the dependency on non-renewable sources.

### *SKILL DEVELOPMENT AND EDUCATION TECHNOLOGY:*

Integrate technology-driven education tools in schools and colleges, emphasizing STEM (Science, Technology, Engineering, and Mathematics) education to prepare the youth for emerging industries. Establish skill development programs aligned with the needs of the local industries to enhance employability and promote entrepreneurship.

### *WASTE MANAGEMENT INNOVATION:*

Implement waste-to-energy projects to convert organic waste into biogas or electricity, contributing to both waste reduction and clean energy generation.

Encourage community-based waste segregation and recycling programs to minimize landfill usage and promote a circular economy.

## COLLABORATION OPPORTUNITIES WITH PRIVATE SECTORS AND INTERNATIONAL INVESTORS

### *PUBLIC-PRIVATE PARTNERSHIPS:*

Encouraging partnerships between the government and private sector through PPPs can facilitate the development of critical infrastructure projects. This collaborative approach can leverage the strengths of both sectors, leading to more efficient and timelier implementation of large-scale developments.

### *INTERNATIONAL COLLABORATION:*

Foster international collaborations for knowledge exchange, technology transfer, and joint initiatives. Engaging with global experts and cities can provide valuable insights and contribute to the city's global competitiveness.

### *GLOBAL INVESTORS:*

Attracting foreign direct investment in real estate projects can fuel growth. Encouraging global investors to participate in large-scale developments and infrastructure projects can bring in expertise, capital, and a global perspective, contributing to the city's international standing.

### *INVESTMENT PROMOTION:*

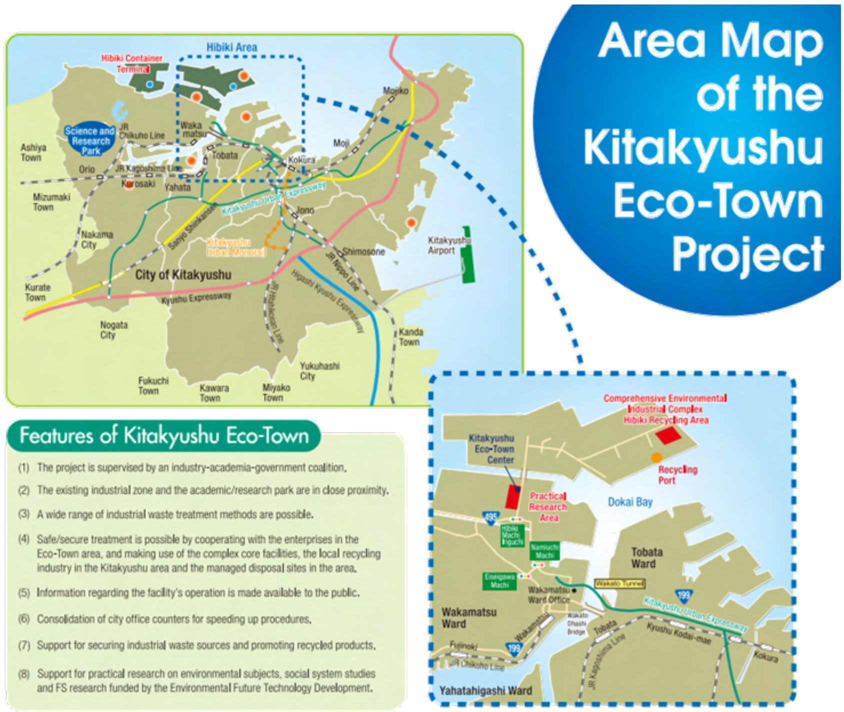
Actively promote Hyderabad as an attractive destination for domestic and international real estate investment. Participate in global forums, engage with investors, and offer incentives to stimulate development in strategic sectors, such as technology, healthcare, and sustainable industries.

# GAINING INSIGHTS FROM THE BEST PRACTICES

## *ECO TOWNS OF JAPAN*

Eco towns of Japan are one of the real-world benchmarks for overall city-level planning. It focused on developing various cities with their unique demand and strategy. A few of the salient features of the eco-towns are as follows-

- Strong legislation, shifting the market towards a sound material-cycle society,
- National and local governments are spearheading the drive to bring together industry clusters to be more sustainable,
- Increasing product research and development – in both public and private sectors, including universities,
- Large and rapidly expanding eco-business market, domestically and internationally,
- Strong focus on environmental technologies and ESTs, and innovative solutions to solve environmental problems, and
- Focus on energy conservation, material development and integrated waste management




Source: Kitakyushu Eco-Town Project by Green Frontier

## *SINGAPORE*

Singapore is ranked as one of the top 15 smart cities in the world in the Smart City Index 2023 because of its efficient governance, long-term planning and contiguous emphasis and effort on innovation and technology. Some of the city-level projects that make it stand out are as follows-

### Water Management Strategies:

Singapore employs a strategy that involves the regulation and control of water flow towards the sea. This entails importing 50% of water needs, recycling and reusing another 50%, and implementing reservoirs, particularly through the creation of barrages around rivers. The transition from imposing concrete embankments to eco-friendly systems underscores a commitment to natural water treatment and enhancing the environment along water bodies.

### Residential Community Development:

The establishment of a new residential community (fourth-generation new town) exemplifies meticulous urban planning within spatial constraints. The focus lies on conserving natural resources while accommodating new infrastructure. Distinctive pathways, viewing decks, and community facilities within the development showcase a seamless integration of green spaces into urban living.

### Monetizing Greenery and Recreation:

Singapore effectively incorporates extensive greenery in residential areas, utilizing it for recreational purposes. Community farming, yoga, marathons, and diverse activities contribute to a lively and health-conscious living environment. Residential waterfronts are promoted, offering scenic views and incorporating activity charts to guide residents to retail, commercial, and entertainment zones within the neighbourhood.

### Commercial Center – Marina Bay:

The Marina Bay development functions as a reservoir, storing substantial amounts of water and emphasizing sustainable practices. Expansive gardens safeguard reclaimed land, creating a distinctive and visually appealing atmosphere. This commercial hub attracts esteemed businesses like Apple, leveraging the natural setting to craft a unique customer experience.

### Sustainable Development - Gardens by the Bay:

Gardens by the Bay epitomizes sustainable development with a strong focus on environmental considerations. Specialized divisions manage water, irrigation, and cooling systems, showcasing a dedication to eco-friendly practices. The integration of recycled water and greenery contributes to a sustainable and visually pleasing urban landscape.

### Hydro-bio-Initiatives:

The hydro-bio initiatives concentrate on harnessing natural assets such as riverfront streams, national parks, and water bodies.

## *LONDON – GLOBAL CITY*

UK's focus on the Global City of London has formed an Innovative ecosystem to accomplish the vision for economic growth

### Innovative Ecosystem:

The UK's financial and professional services (FPS) industry is an essential cog in one of the world's most innovative ecosystems. It drives growth and enables effective investment while supporting innovative solutions to global challenges. London ranks first in the Global Green Finance Index. The FPS industry plays a critical role in the green finance ecosystem, providing specialist support including capital structuring, insurance, and consultancy, which contributes to services exports. The UK is an international hub for sustainable investment opportunities with high ESG score companies. The UK has a deep pool of sustainable finance professionals and graduates, which ensures high ESG investment standards and a pipeline of future sustainability talent. Thus, UK investment in green funds has increased. The UK is Europe's leading centre for fintech investment and London is one of the world's top tech ecosystems. The overall innovative ecosystem is supported by ensuring a high reach of financial activities with a supportive regulatory environment and good global business infrastructure (High-quality offices, well-connected transport links and reliable technology) for Financial Services companies.

## *SABARMATI RIVERFRONT, AHMEDABAD:*

The Sabarmati Riverfront Development is a notable urban redevelopment project in Ahmedabad, Gujarat, India. The project aimed to transform the Sabarmati riverfront into a vibrant and sustainable urban space, integrating environmental conservation, recreational areas, and infrastructure development. It serves as an example of successful riverfront rejuvenation and urban renewal, showcasing how thoughtful planning and sustainable practices can enhance the quality of life in a city.

A feasibility study and concept plan were the first steps in the 1996 inception of the Sabarmati Riverfront Development (SRFD) Project, which is currently being carried out. A novel strategy for self-financing was put forth to increase revenue and lessen the load on the government. The Sabarmati Riverfront Development Corporation was established as a distinct entity to carry out the project.

The Riverfront project offers Ahmedabad's eastern and western communities a fantastic chance to develop a public riverbank. 11.25 km of public riverfront have been created on both banks by reclaiming riverbed land and diverting the river to a constant width of 275 m. A total of 202.79 hectares of land have been reclaimed.

The Riverfront Development project aimed to address these challenges with a bold vision: transforming the riverfront into a dynamic urban space that fosters social, economic, and environmental benefits. Key elements included:

- **River Channelization:** Construction of retaining walls to give the river a constant width, preventing flooding and reclaiming over 200 hectares of land.
- **Promenades and Green Spaces:** Creation of multi-level promenades and parks along the river, providing leisure spaces and improving air quality.
- **Resettlement and Commercial Development**: Relocation of informal settlements and development of reclaimed land for commercial and residential purposes. This generated revenue to sustain the project.
- **Environmental Focus:** Implementation of sewage treatment measures to improve river water quality dramatically.

# 05

# VISION FOR TELANGANA STATE'S FUTURE

# VISION FOR TELANGANA STATE'S FUTURE

## IMPACT ON THE CITY AND ITS CITIZENS

The Government of Telangana has assured that it will consider the ease of living and ease of doing business in its plans. With a focus on improving air quality, environmental quality, and ESG, the government aims to enhance the quality of life for its citizens. The plan also proposes a shift towards decentralized industrialization and urbanization. This move could drive urbanization and real estate growth. The government is also considering introducing industrial zones along the proposed Regional Ring Road. This could lead to a controlled, planned expansion of the city, with land parcels identified for economically weaker sections and affordable housing.

## POLICY INITIATIVES:

### *POLICIES:*

The State-level policies currently in practice by the Telangana state government are as follows.

- **State Policies:** Meet or Beat Policy (for Mega Projects), TS-iPass (Telangana State Industrial Project Approval and Self-Certification System) Act, Solar Policy, ICT Policy, T-Idea Policy, T-Pride Policy
- **State Sector Policies:** Textile Policy, Industrial Policy Framework, Rural Technology Centers Policy, Open Data Policy, Data Analytics Policy, Telangana IoT Policy, Telangana Cyber Security Policy, Telangana Gaming Animation Policy, Data Centre Policy, Innovation Policy, Electronics Policy, Incentive for Expansion of IT/ITeS Companies, E-Waste Management Policy, EV-ESS Policy

  These policies need to be analyzed with the recent interventions and their impact on the overall and sectoral development of the state. Some of the additional Initiatives undertaken by the state government of Telangana that make it stand out on the overall performance of the city are as mentioned below-

### *POLICY REFORMS:*

Continued efforts in refining and adapting policies to align with the changing real estate landscape are essential. Currently, the approval process allows only online uploading. There is a need to streamline the approval processes, ensure transparent land acquisition, and provide incentives for sustainable and inclusive development that can foster a conducive environment for growth.

### *FLEXIBLE LAND USE POLICIES:*

Flexible land use policies that adapt to changing market dynamics can allow for better utilization of available land. This flexibility can accommodate mixed-use developments, promoting a balanced combination of residential, commercial, and recreational spaces and moving towards walk-to-work concepts.

### *RISK MITIGATION MEASURES:*

Introducing policies that address and mitigate risks associated with real estate development, such as natural disasters or economic downturns, can provide stability to investors. This may include insurance mechanisms, contingency planning, or government-backed risk-sharing initiatives. Develop contingency plans and crisis management strategies to address unforeseen challenges, such as natural disasters, economic downturns, or health crises. Establish mechanisms to support the real estate sector during periods of uncertainty and ensure a resilient urban environment.

### *DIGITAL TRANSFORMATION:*

Introducing policies that facilitate the digital transformation of the real estate sector can enhance transparency and efficiency. Digital platforms for property transactions, online approval systems, and e-governance initiatives can streamline processes and reduce bureaucratic hurdles.

### *COMMUNITY ENGAGEMENT:*

Encouraging policies that facilitate community engagement in the planning and development processes can lead to more inclusive and culturally rich neighbourhoods. This involvement can create a sense of ownership and pride among residents, contributing to the overall success of real estate projects.

## AREA OF FOCUS:

### *IDENTIFICATION OF CRUCIAL AREAS THAT REQUIRE ATTENTION FOR HOLISTIC DEVELOPMENT*

- **Enhance Economic Growth:** Strive to enhance Telangana's economy with a rapid Compound Annual Growth Rate (CAGR) of 20% over the next decade, placing a special emphasis on the development of high-tech industries and services.
- **Enhance Quality of Life:** Consistently evaluate and monitor indicators of the quality of life, encompassing factors such as air and water quality, green spaces, and cultural amenities. Utilize data-driven insights to inform urban development policies, ensuring that the city maintains its appeal as a desirable place for both residence and employment.
- **Facilitate Investment:** Foster investments by implementing investor-friendly industrial policies and establishing industrial parks. This strategy aims to stimulate investment across various sectors, supported by a dedicated and proactive promotions team.
- **Develop Advanced Infrastructure:** Focus on the creation of cutting-edge infrastructure facilities and a comprehensive multimodal transportation system in Hyderabad. Additionally, ensure the development of essential infrastructure across all districts to support overall growth and progress.

### *EXAMINATION OF EXISTING GAPS IN INFRASTRUCTURE AND REAL ESTATE SECTORS*

- **Zoning and Urban Planning:** Clear and forward-thinking zoning regulations and urban planning policies can guide the growth of the city in a sustainable and organized manner. This includes designating areas for specific types of development and ensuring a well-balanced urban environment.
- **Infrastructure Expansion:** As Hyderabad continues to expand, there will likely be increased investment in infrastructure projects. The development of new roads, public transportation systems, and connectivity solutions can open up new areas for real estate development, reducing congestion in established regions. Government commitment to continued infrastructure investment is essential for sustained real estate growth. Policies focusing on funding and executing infrastructure projects, including transportation, utilities, and public amenities, can unlock the potential of new areas for development.

- **Public Transportation Development:** Prioritize the development of an extensive and efficient public transportation system. Expanding metro networks, introducing modern bus rapid transit (BRT) systems, and promoting cycling infrastructure can reduce traffic congestion and make the city more accessible. More emphasis should be given to Multimodal transportation and bus-based systems adequately utilizing the Government of India schemes on EV Buses.
- **Streamlined Approval Processes:** Simplifying and expediting the approval processes for real estate projects can significantly reduce delays and uncertainties. Clear guidelines and efficient approval mechanisms can attract more developers and investors, fostering a conducive environment for growth.

### *IMPORTANCE OF BALANCED DEVELOPMENT ACROSS URBAN AND RURAL AREAS*

In the direction of the CM, the Telangana state government is planning to develop all the regions along with Hyderabad to ensure the economic development of the entire state. The focus is on the development of industrial development along the major nodes with the provision of the required physical and social infrastructure along with support of the other real estate asset classes such as residential, and commercial.

## FURTHER DEVELOPMENTAL CONSIDERATIONS

### *GENOME VALLEY'S MEGA EXPANSION*

Hyderabad's Genome Valley is set to undergo a massive expansion, encompassing 300 acres with a hefty investment of INR 2,000 crore. This growth includes the establishment of 10 pharma villages, injecting an additional INR 1 lakh crore into the biosciences sector. The project aims to create numerous jobs and solidify the **city's position as a global biotech hub**. The government's commitment to fostering innovation and entrepreneurship is further exemplified by plans to set up three additional pharma villages in Vikarabad, Medak, and Nalgonda districts, marking a significant stride in the state's biosciences development.

### *PHARMA CITY / PHARMA VILLAGE*

The existing master plan of Pharma City can be reviewed and some more suitable additional sectors like IT/ITeS, Automobile, Sports, Education, and Healthcare activities can be proposed. The infrastructure of this project can be developed as per smart city guidelines and also some of the land pockets can be reserved for Economically Weaker Section (EWS), Affordable Housing activities etc. The government can initiate green rating mechanisms for suitable components and can try to get funds for the development.

### *TRANSFER OF DEVELOPMENT RIGHTS (TDR)*

Transfer of Development Rights is a flexible and effective tool for balancing development needs with conservation objectives, allowing communities to achieve their long-term planning goals while accommodating growth and protecting valuable resources. Marketability of Transfer of Development Rights (TDR) depends on several factors, including the regulatory framework, the specific conditions of the local real estate market, and the perceived value proposition for both sending and receiving area property owners. Due to the non-realization of TDR for those who surrendered their lands for various purposes, the government needs to bring in new solutions to create a demand for TDR. Incorporating best practices in TDR program design and implementation, communities can enhance the marketability of transferable development rights and realize their objectives for sustainable land use and community development.

## GO 111

The Government needs to clarify GO 111.

## ZONING IN HMDA

Given developmental activities, the state should look into zoning and make it simple and beneficial to citizens, developers, and landowners. Multi-use zones can be encouraged to bring out more supply of developable lands creating a balance to economic growth and walk-to-work neighbourhoods. The strain on public transportation and other infrastructure will be drastically reduced. The city should develop on all four sides.

## HOUSING

Affordable Housing, Rental Housing, Housing for Transit Workers, Economically Weaker Section: The government should ensure connectivity to proposed classes along radial corridors. The government should ensure linking to the proposed industrial clusters along the radial roads vis a vis ORR and RRR.

## TRANSIT ORIENTED DEVELOPMENT (TOD) POLICY

Following an appropriate suitable framework and adopting a collaborative, inclusive approach, Hyderabad can develop and implement a TOD policy that enhances mobility, livability, and sustainability for its residents while supporting economic growth and urban vitality. The government should provide large land parcels of land for affordable housing and develop these into TOD zones/clusters through the PPP model.

## NET ZERO

The government should focus on the net zero concept. Embracing the Net Zero concept presents compelling investment opportunities for individuals, businesses, and institutions seeking to align their financial objectives with environmental sustainability goals. By directing capital towards Net Zero initiatives, investors can drive positive environmental impact, promote economic growth, and contribute to a more sustainable and resilient future. So Embracing the Net Zero concept can indeed enhance investment opportunities in various sectors.

## ONLINE APPROVAL SYSTEM (POLICY REDRESSAL)

The Online Approval System should be upgraded from just uploading of files followed by manual checking and red tape to an instant online approval system without any human intervention making it a real and functional online system that further reduces the time taken for the process, emerging technologies like AI and ML should be used and integrated into this system.

## RERA - REAL ESTATE (REGULATION AND DEVELOPMENT) ACT

The RERA registrations are to be issued instantly to online applicants.

## SUSTAINABILITY

The government makes provision for implementing a green rating system involving integrating sustainable practices into the design, construction, operation, and maintenance of buildings and infrastructure projects.

## *EASE OF DOING BUSINESS AND EASE OF LIVING LINK-UP*

By recognizing the interconnectedness between Ease of Doing Business and Ease of Living, policymakers can develop holistic strategies that promote economic prosperity, social well-being, and environmental sustainability for all residents. Collaboration across sectors and stakeholder engagement are essential for achieving balanced and inclusive development outcomes.

## *INTEGRATED TOWSNHIP POLICY RULES - 2020*

The existing township policy needs to be relooked and it has to be improved. Telangana Township Policy aims to facilitate planned and sustainable urban development, create livable communities, and accommodate the growing population in the state. By providing clear guidelines, incentives, and regulatory frameworks, the policy seeks to attract investment, promote innovation, and enhance the quality of life for residents in Telangana's urban areas.

## *LAST MILE CONNECTIVITY*

Addressing last-mile connectivity (bus/train) is essential for creating sustainable, inclusive, and efficient transportation systems that meet the needs of urban populations. By adopting a holistic approach that integrates various modes of transport, leverages technology and innovation, and engages stakeholders, cities can improve accessibility, reduce congestion, and enhance the overall quality of life for residents.

## *PARKING POLICY*

Effective parking policy in Hyderabad requires a balanced approach that considers the diverse needs of residents, businesses, and visitors while addressing issues such as congestion, pollution, and urban sprawl. By implementing comprehensive parking management strategies and leveraging technology and innovation, the city can create a more sustainable and livable urban environment.

## *PARKING LOTS*

The existing parking lots are not sufficient to meet the current requirements hence proper study can be conducted for further improvement. Efforts to improve parking infrastructure, implement technology-driven solutions, and promote sustainable transportation alternatives are essential for addressing these challenges and creating a more efficient and accessible urban mobility ecosystem.

## *WATER*

The dependency of Groundwater Sources (Bore wells) is to be minimized and it has to be centralized sources like HMWSSB / Any other Government bodies.

## *POWER*

The dependency of the power Generator is to be minimized and it has to be a centralized source i.e., Grid System. TSTRANSCO plays a critical role in the electricity supply chain by ensuring the efficient, reliable, and secure transmission of electricity across Telangana.

## *SEWERAGE*

No individual STPs and it has to be connected to One Centralised Location for further treatment and recycled water be used for various non-potable purposes, such as irrigation, industrial processes, groundwater recharge, and environmental restoration.

# 06

# FUTURE PROSPECTS & CONCLUSION

# FUTURE PROSPECTS

The State government has announced the upcoming Master Plan for 2050 as a Comprehensive Plan for Telangana state focusing on rural development, metro connectivity, Musi River development etc. The critical factors to be addressed as a part of the Master Plan are:

- Retaining and attracting talent to form a competitive knowledge base
- Utilizing institutional heartland for education and innovation to promote research and development
- Focus on Emerging technology and its applications such as Robotics, Artificial Intelligence, Blockchain, Drones, Cyber Security, Cloud Technology, Space Tech etc.
- Emphasize on City's Affordability for all through affordable housing initiatives, inclusive zoning policies (considering mixed-use zoning to promote diverse communities and reduce commuting distance), improvement of public transport infrastructure, implementation of a digital solution for governance & smart technologies to improve the efficiency of public services, utilities and transportation.
- Creation of an Innovative Regulatory framework to let the free growth of the global city of Hyderabad and the same time solve the issue of high vacancy currently being faced by the city through the provision of support infrastructure such as transportation and connectivity, social infrastructure etc.
- State Level Plan: District, Mandal and Villages Plans shall be prepared and integrated at the State Level.
- Updation of the online approval process to minimize the human intervention in the entire process and thus streamlining the overall timeline through the implementation of new innovative technologies.
- Protecting investors' interests and boosting their confidence through a consistent and investor-friendly policy framework, streamlined approval process, and smooth collaboration with the industrial bodies to create a conducive business environment.
- Focusing on Inadequate Social & Physical Infrastructure across the cities (Tier1, Tier 2 & Tier 3)
- Spatial division of Telangana into 3 clusters namely urban, semi-urban & rural clusters targeting the development of industrial clusters across the Hyderabad Outer Ring Road, Regional Ring Road and beyond
- Innovation and Integration of Technology and Sustainability strategies addressing rapid construction, advancements in construction technology, the role of artificial intelligence in enhancing living standards, usage of drones in construction
- Technology adaption to streamlined transparent real estate transactions, property verification processes, and increased efficiency of online approval systems in various organisations.
- Implementation of Sustainable Urban Resilience for the Next Generation (SURGe) Initiative by COP27 Presidency in collaboration with UN-Habitat. It is dedicated to connecting the local, national, and global levels with the vision to achieve global climate goals by using effective multilevel governance to transform cities to be healthy, sustainable, just, inclusive, low-emission, and resilient urban systems for a better urban future for all.
- Targeting to achieve the status of Net Zero Carbon Cities as the other global cities. This shall impact the sustainable development of the cities and thus attract global investments.
- Plan for Pharma villages spread across the state to promote industrial decentralization.

- Hyderabad is envisioned as a Global city and a premier livable destination. The State government should further encourage the real estate investors and associations to contribute to the vision and bring in best practices of planning, design, implementation, and management bringing in supportive socio-cultural vibrancy.
- Hyderabad needs to be built as a Resilient city to attract and retain investors. The city needs to form environmentally friendly policies and target clean, green, and economically vibrant zones.
- Increasing the number of international flights/connections to Hyderabad International Airport. This will help industrialization, business growth as well support tourism.
- Transportation facilities addressing the congestion and traffic problems (Road, Railways, Air Connectivity)
- Expansion of the metro connectivity in the HMDA area and focusing on the multi-modal transportation facilities across the major growth nodes and overall transit-oriented development across the corridors. The Transit-oriented development shall focus on the reservation of land for EWS and, the provision of affordable housing along the growth corridors to make it commute-friendly and accessible for the workforce.
- Another major project of Musi riverfront development as the city's next iconic landmark, driving tourism and global recognition to be developed in PPP mode.
- Focus on Clean Rivers around the state through effective watershed management and solid waste management, enforcing strict pollution control measures, protection, and restoration of the river ecosystem, and investing in new green infrastructure projects
- Target emerging markets within Hyderabad, highlighting areas like senior living, healthcare, affordable housing, and economically weaker section living.
- Ease of Doing Business and Ease of Living shall be linked to address the demand and supply of the housing and the office market. This shall lay the understanding of the overall impact on the state-level growth and development.
- Being one of the top rankers in Ease of doing business and with an existing ecosystem as an IT hub, the city shall focus on the development of data centres and improvise the associated infrastructure to attract investors.
- Focusing on the adaptation of sustainable construction technology and building materials to reduce carbon emissions from the built environment.
- The Resident Welfare Association and the Industrial Association shall be actively involved in the city management services to address the issues evolved with the rapidly growing city.
- Promoting tourism within the city of Hyderabad, other cities, and rural areas of Telangana.
- Promoting urban agriculture through the development of the supporting infrastructure and new-age technologies and through incentives.

# CONCLUSION

The state's commitment to economic diversification, infrastructure development, and social welfare has positioned it as a dynamic player in India's overall development landscape. Moving forward, continued strategic planning and implementation will likely contribute to Telangana's sustained growth and prosperity. By implementing visionary policies, addressing key challenges, and fostering collaboration between public and private stakeholders, the state can create a future-proofed urban landscape that delivers sustainable growth, improved quality of life, and equitable development for all. In summary, the future of infrastructure and real estate in Telangana looks promising.

- Telangana has emerged as a hub for Information Technology (IT) and business services, with the capital city Hyderabad playing a pivotal role in attracting global investments. The government's focus on promoting industries, including high-tech and service sectors, has propelled the state's economic development.
- The state has prioritized infrastructure development, investing in advanced facilities and a robust transportation network. Hyderabad, stands as a testament to this progress, boasting modern amenities, smart urban planning, and improved connectivity.
- Despite its urbanization, Telangana has not overlooked the importance of agriculture. The state has implemented innovative farming practices, water conservation measures, and technology integration to enhance agricultural productivity and uplift rural communities.
- Telangana has undertaken initiatives to improve the quality of life for its residents. Health, education, and social welfare programs have been implemented to address the needs of the population, fostering an environment conducive to holistic development.
- The state's proactive approach to promoting a conducive business environment has attracted both national and international investments. Investor-friendly policies, industrial parks, and a dedicated promotions team have contributed to a vibrant and growing industrial landscape.

With a significant scope for development as envisioned in the Master Plan for 2050, Telangana is growing remarkably. The Comprehensive and Multi-dimensional Master Plan shall target to address the challenges and bring in innovative solutions with cutting-edge technology integration. It aims to enable the holistic development of the entire state through the active cooperation of the stakeholders inclusive of both private and public entities keeping in view the welfare of the citizens. The proposed developments could lead to a significant transformation of the state and capital city Hyderabad, making it an attractive destination for both residents and investors. However, these plans need to be implemented thoughtfully to ensure they do not disrupt the city's unique charm and heritage.

All the above-mentioned parameters shall address the overall development of the state by increasing the investment attractiveness and thereby targeting to increase the overall GSDP contribution of the state and the nation. The vision for the year 2050 is to achieve industrial development throughout the state through cluster development across the major road and rail network and at the same time target to achieve the milestones of Net Zero Carbon Emission. These can be achieved through strategic planning in terms of economic growth, spatial growth and focus on the implementation strategy.

# ABOUT CII

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering with Industry, Government and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, with around 9,000 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 286 national and regional sectoral industry bodies.

For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with the Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

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As India strategizes for the next 25 years to India@100, Indian industry must scale the competitiveness ladder to drive growth. It must also internalize the tenets of sustainability and climate action and accelerate its globalisation journey for leadership in a changing world. The role played by the Indian industry will be central to the country's progress and success as a nation. CII, with the Theme for 2023-24 as 'Towards a Competitive and Sustainable India@100: Growth, Inclusiveness, Globalisation, Building Trust' has prioritized 6 action themes that will catalyze the journey of the country towards the vision of India@100.

With 65 offices, including 10 Centres of Excellence, in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and the USA, as well as institutional partnerships with 350 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.

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