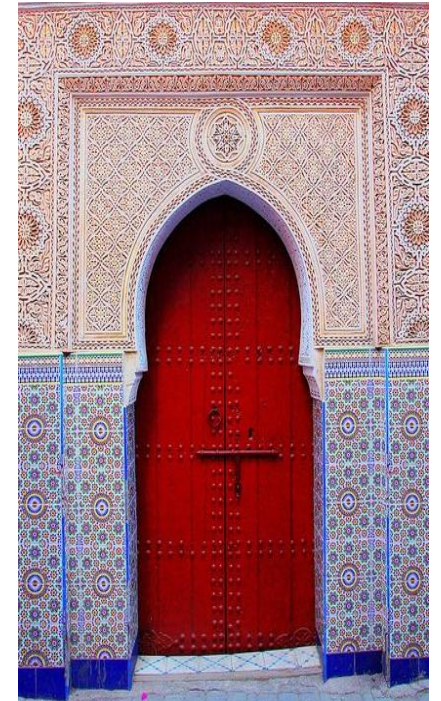




GATEWAY TO INDIA





Keith Ridgeway

- MD Fox Puzzles of London and JV Partner of Foxed Venture of India
- 35 years Business Assurance Management Systems Consultant and MSS1000 Practitioner
- Chartered Quality Institute Professional Practitioner (CQIP)
- Specialist Member of the International Institute of Risk and Safety Management (SIIRSM)
- Good Toy and Environmental Gold Green Apple Award Winner

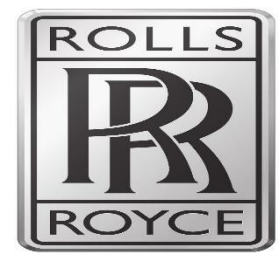




35 years implementing Business Assurance Management Systems and MSS1000 Practitioner



Working together for a safer London





Who are Foxed Venture

It's a joint venture collaboration between Fox Puzzles of London and Edcraft of Hyderabad India.

What We Do

We design and manufacture eco-friendly gifts, toys and teaching, learning therapeutic resources for children and adults of all abilities and for adults with the onset of dementia.





My Journey to India

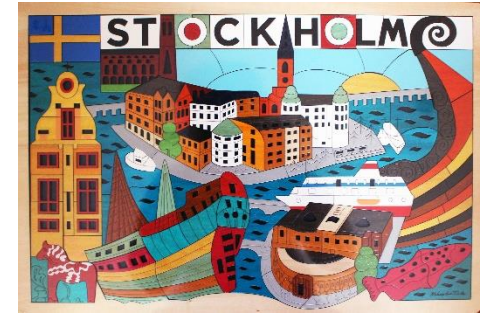
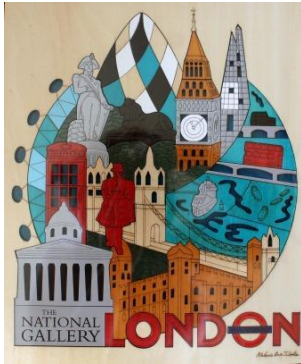


- 2015 - Start looking for the right partner
- 2016 - Graham Nicholas our UKDTI International Trade Adviser supported us in finding Flipkart.
- 2017 - Following 12 months of working together we discovered Flipkart were not the right partners.
- 2017 - SEN London we met the right partner in Rajika Dhiren owner of Edcraft
- 2018 - Foxed Ventures of Hyderabad was formed
- 2018 - Went out to India
- 2019 - Foxed Ventures return to SEN with Classpack.



Foxed Venture Team



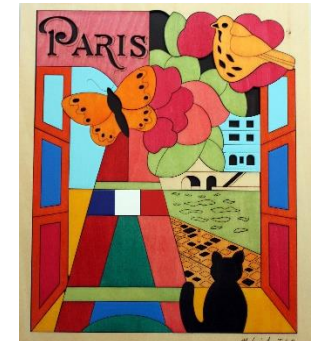
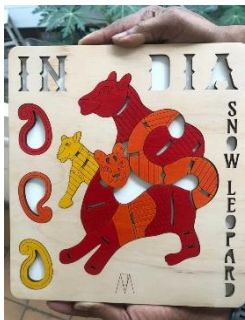


Melanie Ann Juliette

The Artistic Director and Co-owner of Fox Puzzles of London

Studied at London's world-famous art schools, St Martin's School of Art and Design and Central School of Art and Design.

Her natural eye for colour and shape; love of nature, history and culture is what makes Fox's puzzles unique and come alive.





Hon President, Shri A P J Kalam in December 2005



Rajika Dhillon



Prime Minister Modi-distributing Ed Craft aids and-assistive-devices-at-divyangjan-sashaktikaran-samaroh-7

- Inspiring human, teacher and business woman.
- Started Edcraft in 1994 with her teacher friend to make quality teaching and learning materials
- Customers include National Institutes, (NIEPID, NIEPMD), SSAs (under the CWSN program) from various states, DDRCs, DRCs, special schools run by NGOs as well as a vast number of private schools all over the country.
- National Institute for the Mentally Handicapped under the Ministry of Social Justice and Empowerment
- The highlight of her efforts was the dedication of our material to the nation by the Hon President, Shri A P J Kalam in December 2005. It was a historic moment, officially recognized, in our India.





Dhiren-Kameshchandra

A bachelor of commerce. Dhiren's family has designed and made world class wooden furniture for over 100 years.

Responsible for product, process development, and quality aspect of our products.



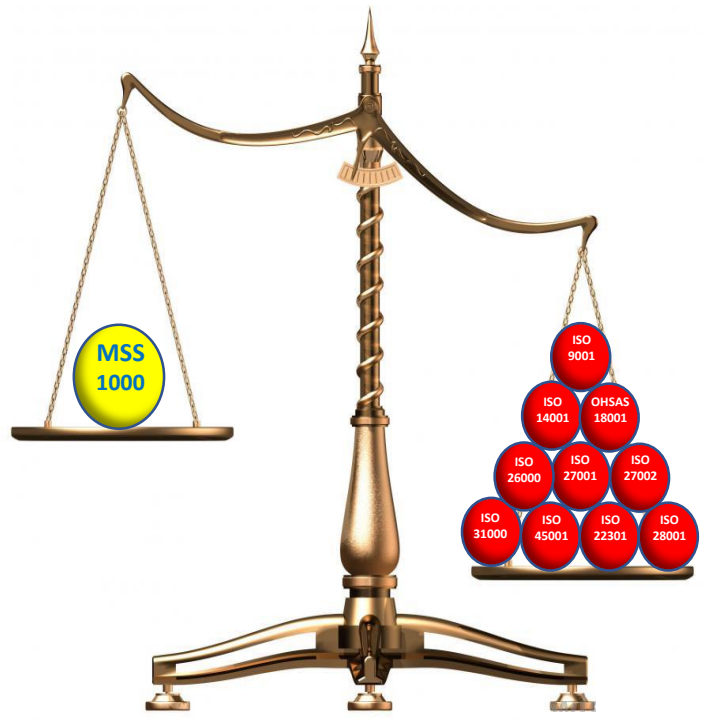
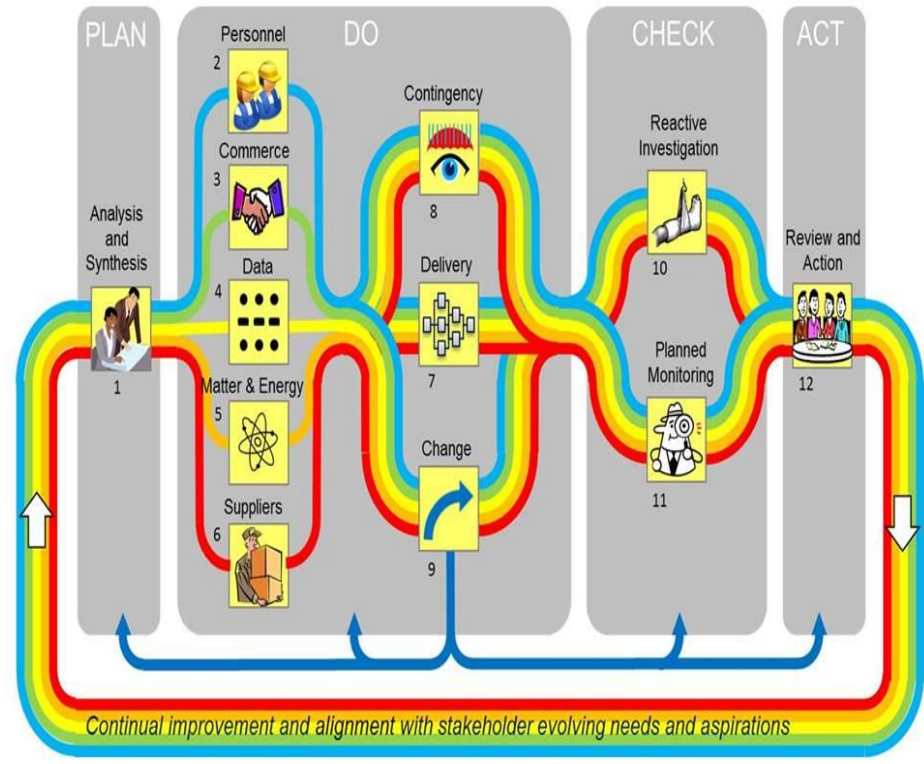


Working together is a the smarter way to empower people





Implemented a Business Assurance Process Management System using MSS10000 Management principles.





If you want to see and touch the quality of India

Please visit the **“Closer to Nature”**
Stand 6G91
in Hall 6



Are there any
Questions
?



I will now hand you over to Chandra Ceeka who will explain



Why India and Why Now





**An invitation to
Telangana (Hyderabad),
the destination for global business**

India: Sleeping giant is rising

- ✓ Democratic dividend: Free press, open internet, real freedom and rule of law
- ✓ Demographic dividend: Largest working-age population in the world
- ✓ Stable, reform oriented and business friendly Government(s)
- ✓ Decisive Government with a decisive mandate (both in New Delhi and in Hyderabad)

UK TELANGANA BUSINESS CHAMBER

Five growth Opportunities

- From poverty to empowerment (56% of Indians lack basics: nutrition, water, sanitation, energy, housing, education, healthcare)
- Sustainable urbanization: Indian cities have to become more livable offering clean air, water, reliable utilities, extensive green spaces...
- Manufacturing for India, in India
- Harnessing technology for India's growth (mobile, IoT, GPS, payments, renewable, genomics,...)
- Unlocking the potential of Indian women. Currently women contribute only 17% of GDP and make up just 24% of the workforce



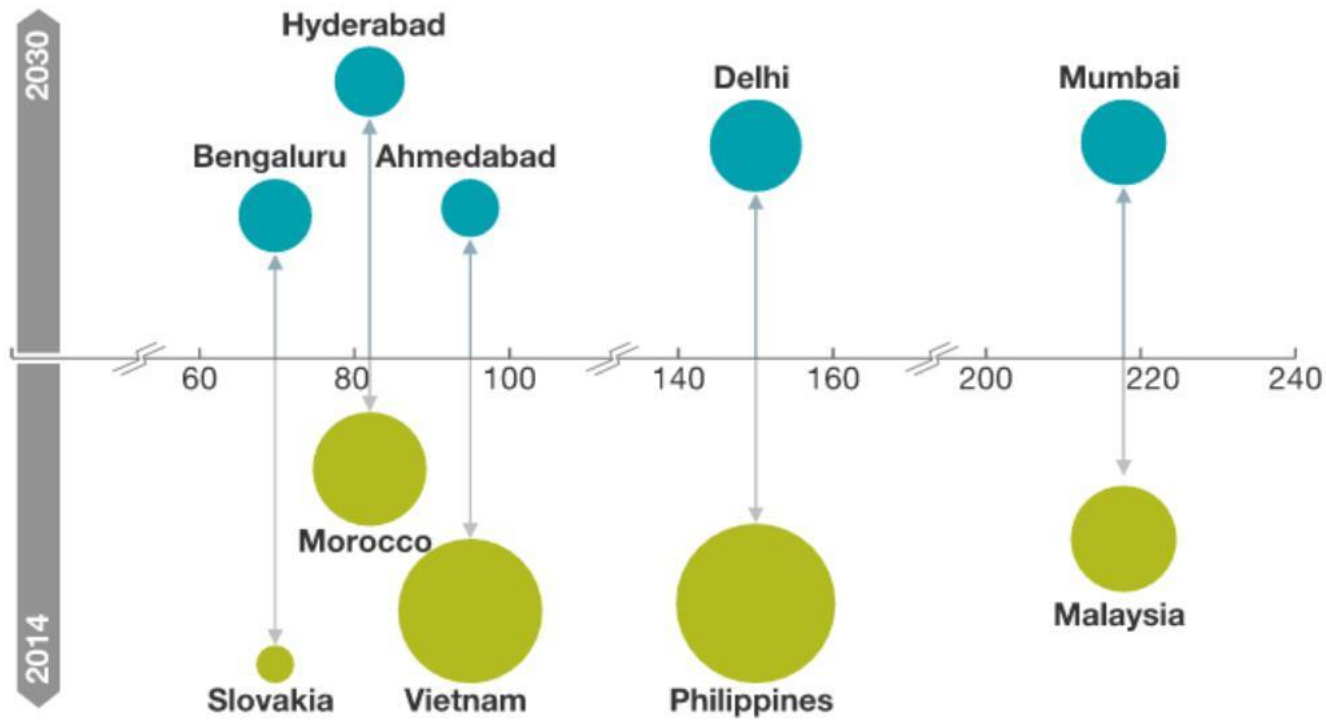
Cities: India's growth engines



By 2030, the economies of India's top five cities will be comparable to those of middle-income countries today.

Real GDP,¹
\$ billion, 2005 prices

○ Size of bubble proportionate to population, ranging from 5 million to 99 million



¹Top 5 cities, based on 2030 GDP values.

Telangana (Hyderabad): Gateway to India & Asia

- ✓ Talent: Largest contributor of students to US Universities and engineers to Silicon valley from any Indian city
- ✓ Home to India's premier Research Labs and Universities
- ✓ Central location with superior infrastructure for India
- ✓ Hyderabad was picked as "India home" by 9 of the top 15 global companies for a reason
- ✓ World's supplier of Pharmaceuticals & Vaccines
- ✓ India's Defense & Aerospace manufacturing hub

Telangana at a glance

- 2015 GDP US \$71 billion (> than Sri Lanka)
- 2015 Software exports exceed US \$+11b
- 86% of the economy = Services & Industrials
- Languages: Telugu, English, Urdu, Hindi, Marathi, Tamil, Kannada, Bengali, Oriya
- Population: 35M (~Canada or ~Malaysia)
- Area: 108,430km² (> South Korea or Austria)
- Telangana has an 'A' credit rating

Industry Drivers

- ❑ Information Technology (IT Investment Region -ITIR)
- ❑ Life Sciences hub (Drugs, API's, Vaccines & Devices)
- ❑ Defense & Aerospace manufacturing
- ❑ Financial Services (advance to Middle-Office category)
- ❑ Automotive manufacturing
- ❑ Food processing & Seeds
- ❑ Basic materials industries (coal, granite, cement)
- ❑ Logistics & Distribution



iPASS: Self-certification and 15 day clearances



WHAT DOES TS-iPASS ACT SAY

BEYOND SINGLE WINDOW

For the first time, it provides applicants the right to timely clearances

Another first is acceptance of self-certification

Time limits for clearances - **15** days for mega projects

Provision of penalty if departments delay clearances

Applicants need not go to different departments

Common application form prescribed

Nodal Officer on the lines of Singapore Economic Development Board (EDB)

Applicants liable for action, if self-certification is false

Minimum inspection and maximum facilitation

Zero tolerance for corruption

POLLUTION CONCERNS

Industries to be categorised as green, orange, red 1 and red 2

Only red **2** category to go to Government of India

90 % of applications cleared by State government

POLICY FRAMEWORK

Secure, progressive business regulatory environment

Rs. 100 crore to TSITC for infrastructure development

Inclusive industrialisation with social equality

THRUST AREAS

Life sciences including biotechnology and pharma

IT hardware including medical devices, communications

Aviation, aero-space and defence

Food processing and nutrition products

Textiles, leather and apparel, related products

Automobiles, farm equipment, transport vehicles

PLASTICS AND POLYMERS

Fast Moving Consumer Goods (FMCG), domestic appliances

Plug and play infrastructure in industrial parks

10 % water earmarked for industry



Initiatives for 2014-15

New pharma city, chemical city with developed infrastructure, waste management

Development of Hyderabad-Warangal industrial corridor

Development of Warangal as textile hub of Telangana

Food processing, seed production initiatives
Creation of venture capital/angel fund

Courtesy: The Hindu



Telangana awarded Promising state of the year



★★★ INDIA BUSINESS LEADER AWARDS OF THE YEAR 2015 ★★★



Telangana

Promising State Of The Year

In Telangana—Innovate, Incubate and Incorporate The Telangana State Industrial Investment Corporation has 150 ready-to-occupy industrial parks that have attracted both domestic and international investors. Furthermore, the government of Telangana is determined to create an ecosystem in which the ease of doing business in the state matches and even exceeds the best global standards.



October 15, 2015





9 of the top 15 global companies have their largest India operations in Telangana





Global Investors Meet



Opportunity for Knowledge sharing and social & business transformation

Hyderabad to host the first **Telangana Global Investors Meet**. This will be a platform for policy makers and industry leaders from around the world to promote investments in Telangana.

It will focus on sustainable and inclusive development, highlight business opportunities in Telangana for domestic and overseas business and facilitate knowledge dissemination.





Technology Ecosystem (Today)



Growing domestic Internet economy to spur growth



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Technology Ecosystem



Home to well known Software & IT service providers





Hyderabad Ecosystem



- Rich Talent pool (home to India's premier engineering colleges)
- Well developed social & physical infrastructure
- US \$1.6B India Govt. fund for start-ups
- Renewed optimism on economic prospects *McKinsey survey- June 2014
- FDI (equity) inflows 2012-13 US \$5.6B *RBI report





Life Sciences Ecosystem



Telangana is the largest producer of bulk drugs in India and 20% of vaccines in the world



Dr.Reddy's Annual revenues: > \$2B



Annual revenues: > \$1.3B



Granules

Granules is a leader in manufacturing Paracetamol, Ibuprofen, Metformin, Guafenesin and Methocarbamol for quality-conscious customers.





Medical Research & Care

Contract research, primary and specialty medical care



One of the largest and advanced emergency centers in the country



**3rd INTERNATIONAL INDIA
MEDICAL TOURISM CONGRESS 2016**

WHEN
Sep-3rd to Sep-4th



WHERE
Hyderabad, India



Nizam's Institute of Medical Sciences



L V Prasad Eye Institute

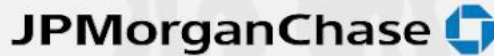




Financial Services



- Advance to middle-office category
- Focus on performance management with continuous improvements



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Defense & Aerospace



- Largest concentration of defense manufacturing & R&D units with over 200,000 employees
- Outside of the west, India is the most attractive market



Aircraft overhaul center, RGIA
Opened May 2014



Hindustan Aeronautics Ltd, Balanagar



Lockheed Martin, Adibatla



Sikorsky Adibatla



Manufacturing

Think lean, think limits, think profit per hour,
think holistic, think circular



Mahabubnagar



Bharat Heavy Electric Ltd (BHEL)



Mahindra Tractors, Medak



TOSHIBA
Leading Innovation



Thimmapur Composite Plant



Mahindra Auto, Zaheerabad



Celkon, Medchal



ITC Paper Products, Khammam



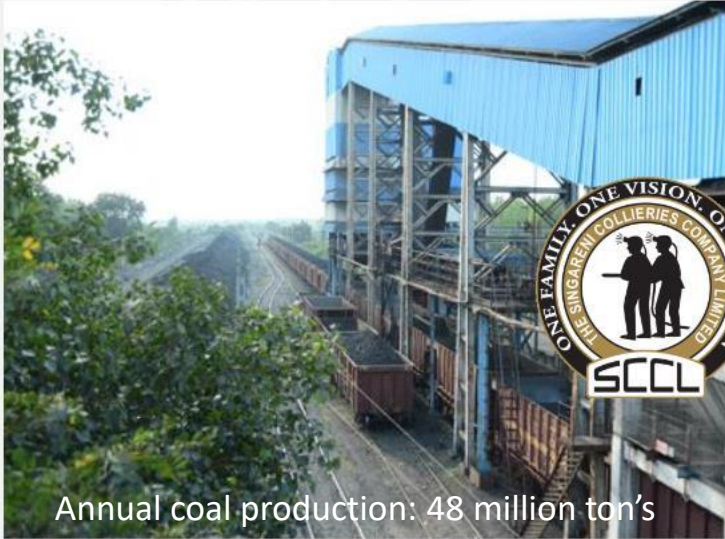
Dry Port, Hyderabad



Basic Materials Industries



source scarcity will drive third industrial revolu



Annual coal production: 48 million ton's
Singareni coal mines, Karimnagar



National Mineral Development Corporation
Headquarters, Hyderabad



Lambapur Uranium
Project, Nalgonda
(Rs 637 cr allocated)



Kesoram Cements, Karimnagar
uktbc.co.uk



Granite mines, Warangal

Retail



E-Commerce will lessen the need for physical stores

Both FlipKart and Amazon picked Telangana for their largest fulfilment center in India



Laad Bazaar, Hyderabad



Inorbit



GVK one



CITY CENTER



THE FORUM Sujana Mall



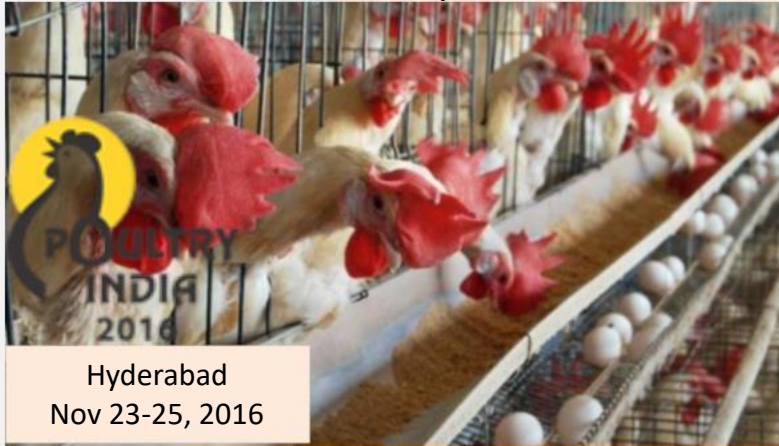
bharti | Walmart



Food Industry



- Low productivity driven by fragmented holdings
- Create more value from local food production
- By 2050, the world will need to feed ten (10) billion people



First of three Mega food parks, Nizamabad



Poultry procession plant, Hyderabad



Cage fishing, Koilsagar, Mahabubnagar



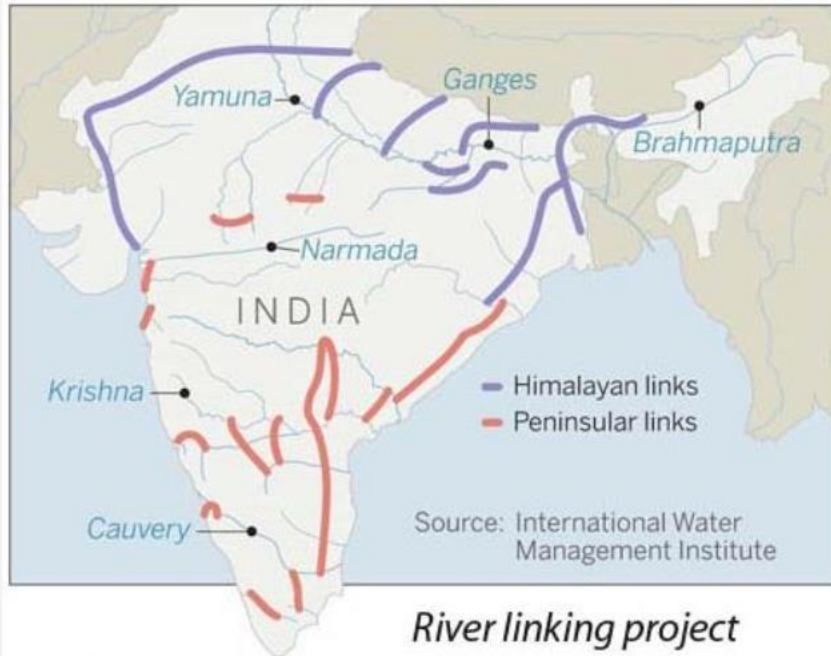
Horticultural green houses, Medak District



Water



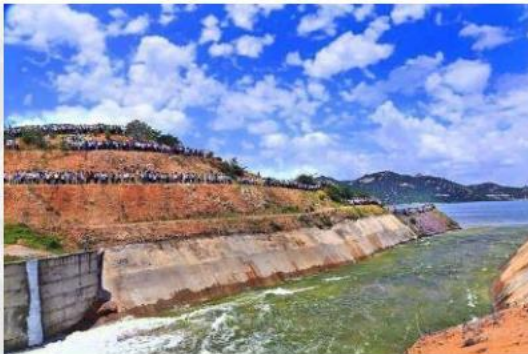
India's plan calls for 15,000 kilometers of canals and tunnels (not all are shown)



Krishna/Godavari water to feed Telangana homes with a 126,000 km water grid



Mission Kakatiya to restore 46,631 water bodies with storage capacity of 265 TMC over four years



Lift irrigation, Kalwakurthy, Mahbubnagar



Sriram Sagar Dam, Nizamabad



Srisailem Dam, Mahabubnagar/Kurnool



Energy

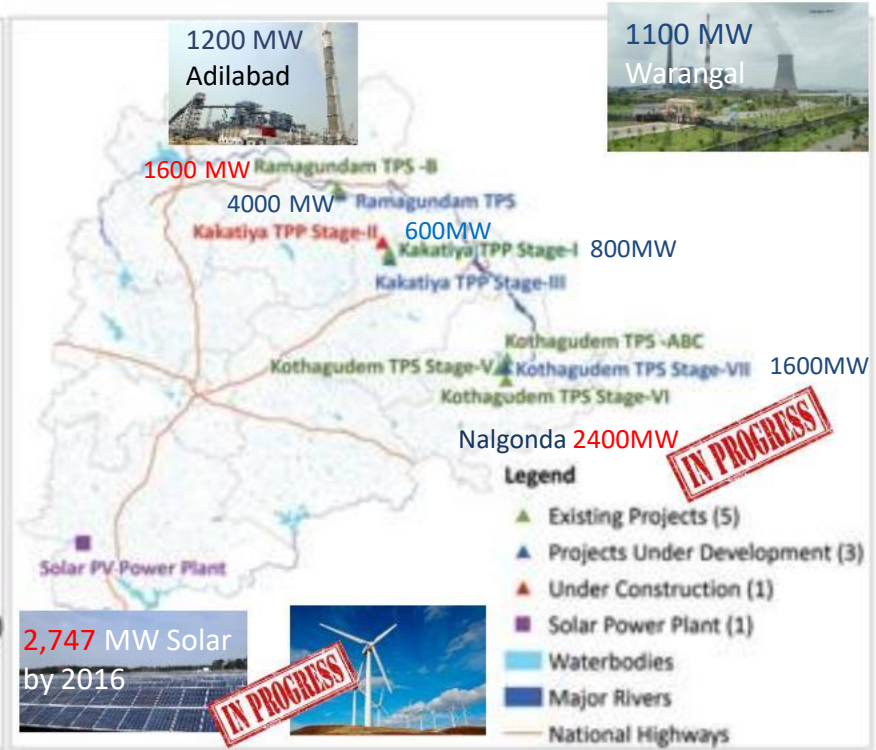


- Goal: 24x7 uninterrupted power supply
- Needs huge investments to meet demand

Spatial Distribution of Hydro Power Plants



Spatial Distribution of Thermal & Solar Power Plants



1720 MW Power Station
Kothegudem, Khammam



45 MW solar unit
Mahabubnagar



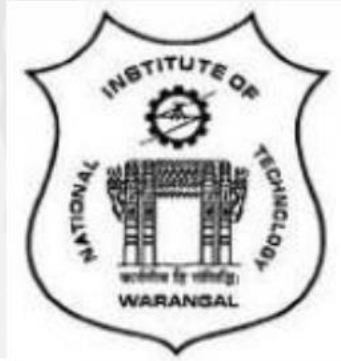
13 MW captive solar
unit, Jedcherla



2600 + 4000 MW Power Station
Ramagundum, Karimnagar



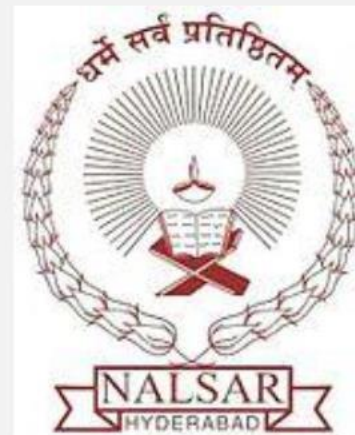
Home to India's premier Universities



BITS Pilani
Hyderabad Campus



*Indian School of Business
Ranked 33rd in the world*



Ranked no 1 law school in India



*भारतीय प्रौद्योगिकी संस्थान हैदराबाद
Indian Institute of Technology Hyderabad
With 400 Ph.D students*



National Research Labs



National Institute of Nutrition (NIN)



Center of Cellular & Molecular Biology (CCMB)

CCMB



Defense Metallurgical Research Labs (DMRL)



Indian Institute of Chemical Technology (IICT)



Defense Research and Development Labs (DRDL)

COMING SOON

National Resource Facility for Bio-medical Research (NARF)



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Tata Institute of Fundamental Research - Hyderabad



National Defense Academies



Air force Academy, Dundigal, Medak



Military College of Electronics & Mechanical Engineering (EME), Trimulgherry



Air Force Helicopter Training Center, Hakimpet



Hyderabad Police (new) patrol cars



National Industrial Security Academy, Hakimpet



National Police Academy, Hyderabad



Real Estate



- Hyderabad has the most affordable real estate among major cities in India
- SEZ tax benefits: Exemption from income, customs, excise, service & sales Tax
- 5.6 m sq. ft of new office space was leased in the city during 2016 up 37% YoY





International Schools



- Many options for kids of expats
- Need for quality education for the disadvantaged



Famous alumni of Hyderabad Public school (HPS)

- Satya Nadella, CEO Microsoft
- Shantanu Narayen, CEO Adobe Systems
- Ajay Banga, President and CEO, MasterCard
- T K Kurien, CEO Wipro
- Karan Bilimoria, Chairman, Cobra Beer
- Talat Aziz, Ghazal Singer, composer
- Prem V. Watsa, CEO FairFax Financial
- Dr. Hari Prasad, CEO Apollo Hospitals
- Syed Akbaruddin, India's representative to the UN





Hyderabad Ecosystem



Hyderabadi's who made an impact



Satish Reddy, Chairman, Dr. Reddy Labs



Shantanu Narayen, CEO Adobe Systems



Syed Akbaruddin, India's UN representative



Vinai K Thummalapally, former US Ambassador to Belize



Keerti Melkote, Founding Ceo – Aruba Networks (now HP)



Syed Ali, CEO Cavium Networks



Satya Nadella, CEO Microsoft



Ajay Banga, President and CEO, MasterCard



Sports



- Home to world No 1 Tennis and 2 Badminton stars
- Premier sports academies and facilities



Sania Mirza & PV Sindhu



Sania Mirza tennis Academy



National Winners

Telangana women's badminton (above)
Telangana Beach Volleyball (below)



Gopichand Badminton Academy



Golconda Masters

GOLF CHAMPIONSHIP 2016



1st Afro-Asian Games
Hyderabad, India
October 24 to November 1, 2003



WITNESS 5 DAYS OF NATION'S BEST HORSEMANSHIP
3RD FEB TO 7TH FEB, 2016



Getting Around



- New Metro will improve quality of life in Hyderabad
- First Centre of Excellence for Uber for Asia in Hyderabad



Hyderabad airport ranked **best** in the world - 2016

Ranked for 5-15m passengers by Airports Council International(ACI) . Air Traffic grew 20% year-over-year 2014-15

\$2.4B, 72km Metro
ETA June 2018



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Quality of Living



Hyderabad ranked number one city in India
Three(3) years in a row

2017 CITY RANKINGS



MERCER'S QUALITY OF LIVING RANKINGS VIENNA TOPS MERCER'S ANNUAL LIST

Mercer has released the latest ranking of cities around the world

Hyderabad ranked number one in India

REPORTS EVALUATE THESE FACTORS:

- Housing
- Climate and physical conditions
- Pollution
- Disease and sanitation
- Medical facilities
- Education facilities
- Infrastructure
- Physical remoteness
- Political violence and repression
- Political and social environment
- Crime
- Communications
- Cultural and recreation facilities
- Availability of goods and services

LOCATION EVALUATION AND QUALITY OF LIVING REPORTS

MERCER'S LOCATION EVALUATION AND QUALITY OF LIVING REPORTS
PROVIDE A CRITICAL OVERVIEW OF KEY ELEMENTS THAT MAKE UP LIVING
CONDITIONS FOR CITIES AROUND THE WORLD



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Also Lonely Planet: Hyderabad listed Third best place to visit in 2013

HYDERABAD, INDIA A DIAMOND IS FOREVER

1 Stories of Hyderabad's poetic past weave amid strings of programming code in this southeastern India city that was home to one of the richest men in the world, Mir Osman Ali Khan, the last ruling nizam of Hyderabad. Now a seed-bed for many global IT brands, Cyberabad (as it's dubbed) is where you can hear the muezzin's call above the traffic din generated by aging Urdu scholars and young software engineers alike. Here, ancient boulders guard the peripheries of HITEC City, while new rooftop bars hem in

WHEN TO GO, WHERE TO STAY, AND OTHER TRAVEL TIPS

National Geographic (Travelers) - Jan 2015

BEST OF THE WORLD

BEST OF THE WORLD 2015



- 1 HYDERABAD, INDIA
- 2 ZERMATT, SWITZERLAND
- 3 KOYASAN, JAPAN
- 4 MARAMUREȘ, ROMANIA
- 5 TUNIS, TUNISIA
- 6 CHOQUEQUIRAO, PERU
- 7 MERGUI ARCHIPELAGO, MYANMAR
- 8 CORSICA
- 9 SEA ISLANDS, SOUTH CAROLINA
- 10 SARK, CHANNEL ISLANDS
- 11 THE PRESIDIO, SAN FRANCISCO
- 12 ESTEROS DEL IBERÁ, ARGENTINA
- 13 PORT ANTONIO, JAMAICA
- 14 NATIONAL MALL, WASHINGTON, D.C.
- 15 MONT ST. MICHEL, FRANCE
- 16 OKLAHOMA CITY, OKLAHOMA
- 17 MEDELLÍN, COLOMBIA
- 18 HAIDA GWAI, BRITISH COLUMBIA
- 19 MORNINGTON PENINSULA, AUSTRALIA
- 20 TAIWAN



Discover Telangana



Historical places, wildlife reserves & monuments



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“Hop on, Hop Off” Tourism buses Introduced May 2015



Obelisk of Nizam’s French General Michel Raymond, Hyderabad





Telangana Tourism

It's all in it



Medak Cathedral (built 1924)



Kawal Tiger reserve, Adilabad



Salarjung National Museum



Charminar, Hyderabad (built 1591 AD)



Warangal Fort (built 1261 AD)



Golconda Fort (built 945 AD)



Chowmahalla Palace, Hyderabad



Macca Masjid, Hyderabad

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Nizam Palace of Hyderabad



Telangana Tourism

It's all in it



Nehru Zoological Park, Hyderabad



New Years at Necklace Road, Hyderabad



Ramoji Film City, Hyderabad



Hyderabad will host SKAL-2017



Savaan Ilavat



GULI
DILON KA SHARABAD



SUNBURN FESTIVAL
ON THE ROAD TO 2015

FEATURING
R3HAB DJ SNAKE
CHUCKIE MATISSE SAKKO
SHAAN

14 NOVEMBER 2015, HYDERABAD



Bathukamma festivals, Hyderabad



Sky Fest Dec 23, Hyderabad



Tangeda Puvvu (Cassia auriculata) – state flower



Palapitta (Blue Jay) – state bird



Jammi Chettu (Prosopis Cineraria) – state tree



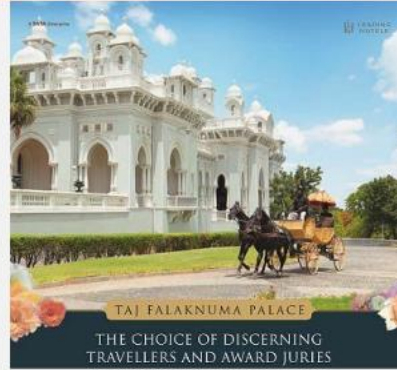
Jinka (Indian Deer) – state animal



Hospitality



- Hyderabad is known for its great food & culture
- Home to many premier hotels





Helping to build Tomorrow's Telangana Today We can't do this alone...



Proposed Telangana State Secretariat



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Yes we can!
Yes we will!!



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- http://www.mckinsey.com/insights/public_sector/Scaling_a_start_up_community_an_interview_with_Berlins_mayor?cid=other-eml-alt-mip-mck-oth-1407
- <http://www.deccanchronicle.com/140802/commentary-op-ed/article/it-sector-ready-be-rebooted>
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