

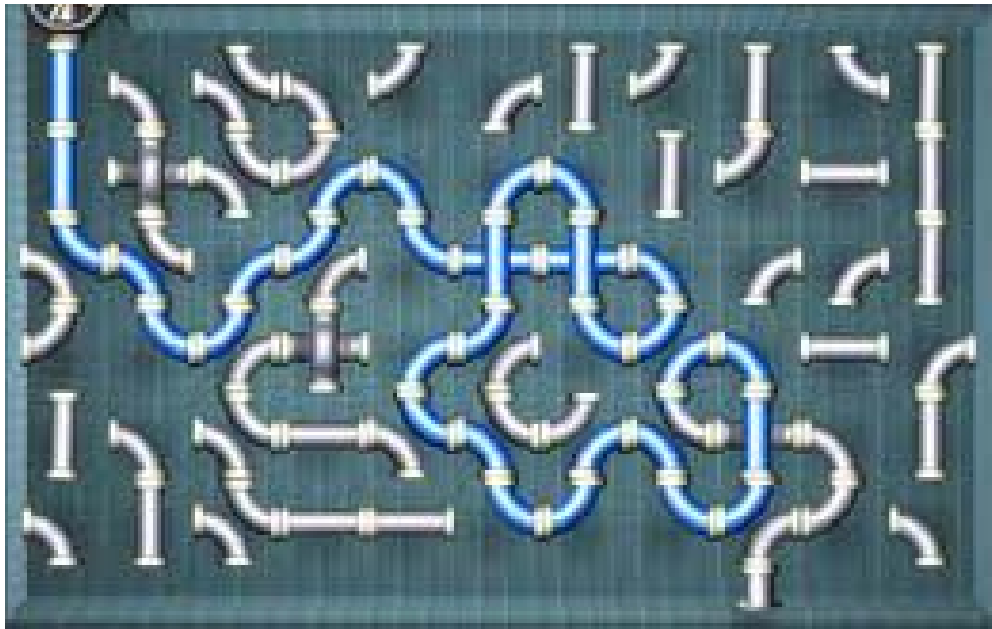
**Market Survey Report
(Phase-1)**

on

Employability Skills in Plumbing Industry

A project under

**Swarn Jayanti Gram Swarajgar Yojana- Special Projects
Ministry of Rural Development
Government of India**



Conducted by

**Market Research Team
Bhaskar Foundation
New Delhi**

Contents:	Page No.
Executive Summary	3
Introduction	4
Objectives of Market Study	5
Process of Research	6
Problem Identification & definition	6
Development of Approach	6
Research Design	7
Data Collection	7
Report Making	7
Steps followed for Market Survey	7
Construction Industry in India	9
Real Estate Sector	11
Residential	11
Commercial/Retail Construction	12
Rajasthan	13
Haryana	20
Punjab	26
Swot Analysis	33
Analysis - Focus states and selected Course	34
Survey findings	34
Meetings conducted for Market Survey	39

Executive Summary:

Bhaskar Foundation has partnered with Ministry of Rural Development, Government of India under SGSY (SP) scheme in implementing a placement linked skill development project specifically in Plumbing trade in Punjab, Haryana, Rajasthan, MP and Gujarat. The plumbing trade was selected based on interaction with Indian Plumbing Association which highlighted the concerns with regard of shortage in availability of technically qualified manpower. Based on this input it was felt that a good placement linked skill development project can be initiated for unemployed BPL rural youth. As a pilot project the states mentioned above were identified and selected for the project. The project was approved by Ministry of Rural Development and to start with Bhaskar Foundation is planning to launch this training programme in Punjab, Haryana and Rajasthan in first Phase.

The market survey has been conducted with an objective of identifying prospective job markets which can be targeted for placement.

The target group for placement linked training programme is BPL youth of age between 18 to 35 with varied qualification levels and from selected districts of Punjab, Haryana and Rajasthan. Companies who implement their projects near these districts where mainly focused upon.

The availability of qualified and trained manpower in these job markets is in scarcity due to the almost under capacity of training infrastructure in these cities. Another reason is that rural poor and needy youth due to lack of resources cannot pay and get themselves trained. They also lack necessary linkage with employers.

Though with reluctance, as there is no other option, at present employers are mostly providing in house training for new recruits to make their businesses functional. An initiative like ours is being seen as a welcome sign.

Based on the findings of survey the ground seems to be quite positive for launching this project. Employment is available as can be seen through various figures in the report. Jobs are available in Metro cities also and employers are willing to offer jobs for these trainees.

Introduction:

India is a predominantly agricultural country. Wage employment is a small fraction of total employment. As per estimates of the National Sample Survey Organization, there were about 90 lakhs people totally unemployed in 1999-2000, out of which about 55 lakhs were educated with secondary and higher education levels. Compared to the size of the population, these numbers appear small. What is serious is the large number of employed persons working with low levels of productivity and income. Out of an estimated 397 million employed, about 122 million are poor, i.e. living below the poverty line. The main reasons for such a situation include inadequate growth of the economy, power productivity & labour force being inadequately skilled and growth rate of labour force being higher than the growth rate of employment etc.

Employment & Unemployment Situation in India
[during Jan-June 2004 (Usual Status basis)].

Total Labour Force	45.8 Crore
Total Employment	44.7 Crore
Total Number of open unemployment	1.06 Crore
Employment in organized sector	2.64 Crore
Employment in Unorganized Sector	42.10 Crore
No. of job seekers with Employment Exchanges	4.03 Crore
(as on 31.12.2005)	

At present the capacity of skill development in India is around 3.1 million persons per year. The 11th Five Year Plan envisions an increase in that capacity to 15 million annually. India has target of creating 500 million skilled workers by 2022. Thus, there is a need for increasing capacity and capability of skill development programs.

With a view to ensure inclusion of the rural poor in the growth process, the Ministry of Rural Development, Government of India had formulated several schemes specifically targeted at rural BPL. Among these, the Swarnjayanti Gram Swarozgar Yojana (SGSY), launched on 1st April 1999, aims to bring the assisted families (Swarozgaris) above the poverty line by ensuring appreciable sustained level of income over a period of time. The objective of each Special Projects for Skill Development would be to ensure a time-bound training and capacity building programme for bringing a specific number of Below Poverty Line (BPL) families above the poverty line through placement ensuring regular wage employment.

Since 1999 Ministry has successfully run this scheme and provided employment to lakhs of unemployed BPL youth. The project is being run in PPP mode.

Bhaskar Foundation an initiative of Dainik Bhaskar Group under CSR activities works in Skill Development sector with a special focus. Bhaskar Foundation runs various skill development programmes in different states of India some of these are supported by state or central Government.

In order to create livelihood opportunities for BPL rural youth of Punjab, Haryana, Rajasthan, MP and Gujarat, Bhaskar Foundation approached Ministry of Rural Development, Govt of India and proposed a skill development project under SGSY (SP) in Plumbing trade. A target of training 2000 beneficiaries in total has been taken in this project.

Bhaskar Foundation prior to submission of proposal had conducted a preliminary survey to assess the employment potential in Plumbing sector. Discussions were held with Indian Plumbing Association and their members to understand the requirement of manpower in plumbing sector. The feedback and inputs provided by them were quite encouraging. The project was sanctioned by NIRD in July 2011.

In the first phase Bhaskar Foundation decided to launch this training programme in states including Haryana, Punjab and Rajasthan. Study was thus undertaken keeping in view the suitability of placement linkage for these states.

Objectives of Market Study:

1. To evaluate job potential in plumbing trade for beneficiaries trained on short duration courses.
2. To find out number of job opportunities in these cities.
3. To understand pattern of wages for construction workers
4. To know living conditions of workers.
5. To assess the growth trajectory of skilled and semi skilled workers.
6. To find out attrition rate of workers.
7. To know the trends of migration of workers from these cities for seeking job in similar sector
8. To know whether companies are willing to support by way of OJT/Guest Lectures/Field visits etc.
9. To seek feedback of companies who have employed such workers trained under similar schemes.

Process of Research:

Problem Identification & definition:

In the rural sector, 457 persons and 435 persons out of 1000 persons are in the categories of self employed and casual labour respectively. Rest 108 employed persons belong to regular wage or salaried class in the rural areas. In the rural areas, the worker population ratio is estimated at 329 persons per 1000 population. Within the employed population, self employment is the dominant category. As already known, that in the rural sector majority of the employed persons are in the agriculture, forestry and fishing related industry group (576 persons out of 1000 persons). This is followed by construction (72 persons), manufacturing 67 persons and community services 63 persons.

BPL rural youth lack access to formal means of training and skill improvement. With the result they remain left out in the process of gaining wage employment. Due to their meager financial resources they are not able to pursue education and any employable training.

Though millions of job opportunities are on offer in different sectors but the availability of skilled manpower is a challenge. About 80% job seekers in employment exchange are without any professional skill.

The construction sector is one of the largest employers in the country. In 1999-2000, it employed 17.62 million workers, a rise of 6 million over 1993-94. The sector also recorded the highest growth rate in generation of jobs in the last two decades, doubling its share in total employment. The construction industry is characterized by the predominance of migratory and unskilled labour. Therefore, there is need to expand the training and skill certification programmes, both in terms of content as well as geographical reach. To encourage such training, incentives may be provided to contractors for funding the skill upgradation of construction workers. However, there is no institutional framework to impart training at the worker's level, barring a few initiatives taken by the Construction Industry Development Council (CIDC) and some companies. There is need to involve the Industrial Training Institutes (ITIs) in a big way with training for the construction sector to bridge the demand-supply gap for skilled labour force.

Development of Approach:

Bhaskar Foundation as a CSR initiative is working in various areas of development sector. One of the focus areas is livelihood generation through skill training. The Foundation is working in rural areas and engaging youth in training programmes which will ultimately help them in gaining employment. In a way the problems mentioned above are being addressed through this intervention.

Research Design:

To meet the project objectives it was necessary to conduct the primary and secondary survey. The data thus collected gives a balanced overview of the ground situation.

- Secondary Data : Meetings were conducted with Government officials including DRDAs, Industry Departments, Industry Associations, Contractors, Builders, Training institutions etc. Information on various websites was also accessed.
- Primary Data: Survey forms based on the information required as per study objectives were designed and circulated among plumbing contractors. Main focus was laid on cities in the project states.

Data Collection:

Data was collected through survey forms from various plumbing contractors and construction companies from various parts of the country with a major focus on project states. Meetings were also held with Indian Plumbing Association office bearers to ascertain the level of requirement of manpower in various states.

Data Analysis:

The data thus collected through primary and secondary sources was then collated and tabulated. To get a better picture of target objectives it was prudent to do the analysis based on each city. City wise data was collated and then information required was churned out. Primary data was analyzed by tabulating the information collected in survey forms.

Report Making:

Market research reports and presentations are easily the second most important step, if not the first. The report was made to understand the feasibility of the project with regard to availability of jobs for trades identified. The report also gave an idea about growth anticipated in construction sector and the job potential to achieve placement linkage. Various challenges and opportunities with regard to implementation of project were also identified.

Steps followed for Market Survey:

An extensive interaction with various cross section of relevant and concerned people in two states was held. Due to a strong network of Dainik Bhaskar in these states it was easy to identify right people and the possible source of information. Meetings with senior Government officials and business leaders were also easily possible due to good relation of our local staff of that place with such people.

Based on this basic information a strategy was developed for further plan of action. A list of target persons was then formed for collecting secondary data required as per the objectives of study. A broad format of Information to be collected was created which included following points:

- Overall construction industry scenario in India
- Growth anticipated in future
- Status of manpower availability both skilled and unskilled
- Major plumbing contractors
- Employment scenario
- Workforce migration patterns
- Minimum wages for plumbers
- Overall condition of workers
- Growth trajectory of workers

Meetings were held with important players in construction sector more specifically plumbing companies to understand the market situation in respect of the objectives of survey.

Separately a questionnaire was developed for primary data collection which included fields like:

- Nature of jobs available at entry level
- Number of jobs available at entry level
- Skill sets required
- Attrition rates
- Qualification and soft skills required for entry level jobs
- Future requirement of workers at entry level
- Kind of support and cooperation which can be provided by the company for this project

The survey team met plumbing contractors, HVAC contractors, construction companies, labour suppliers, builders, house maintenance companies etc and collected this information.

Survey form was circulated among members and functionaries of Indian Plumbing Association, International Association of Plumbing and Mechanical officials also to collect the data.

Meetings were held with Government officials also to seek their valuable inputs.

Construction Industry in India:

The evolution of **Indian Construction Industry** was almost similar to the construction industry evolution in other countries: founded by Government and slowly taken over by enterprises. After independence the need for industrial and infrastructural developments in India laid the foundation stone of construction, architectural and engineering services. The period from 1950 to mid 60's witnessed the government playing an active role in the development of these services and most of construction activities during this period were carried out by state owned enterprises and supported by government departments. In the first five-year plan, construction of civil works was allotted nearly 50 per cent of the total capital outlay.

The first professional consultancy company, National Industrial Development Corporation (NIDC), was set up in the public sector in 1954. Subsequently, many architectural, design engineering and construction companies were set up in the public sector (Indian Railways Construction Limited (IRCON), National Buildings Construction Corporation (NBCC), Rail India Transportation and Engineering Services (RITES), Engineers India Limited (EIL), etc.) and private sector (M N Dastur and Co., Hindustan Construction Company (HCC), Ansals, etc.). In the late 1960s government started encouraging foreign collaborations in these services. The Guidelines for Foreign Collaboration, first issued in 1968, stated that local consultant would be the prime contractor in such collaboration.

The objective of such an imposition was to develop local design capabilities parallel with the inflow of imported technology and skills. This measure encouraged international construction and consultancy organizations to set up joint ventures and register their presence in India.

In India Construction has accounted for around 40 per cent of the development investment during the past 50 years. Around 16 per cent of the nation's working population depends on construction for its livelihood. The Indian construction industry employs over 3 crore people and creates assets worth over 20,000 crore.

It contributes more than 5 per cent to the nation's GDP and 78 per cent to the gross capital formation. Total capital expenditure of state and central govt. will be touching 8,02,087 crores in 2011-12 from 1,43,587 crores (1999-2000).

The share of the Indian construction sector In total gross capital formation (GCF) came down from 60 per cent in 1970-71 to 34 per cent

in 1990-91. Thereafter, it increased to 48 per cent in 1993-94 and stood at 44 per cent in 1999-2000. In the 21 st century, there has been an increase in the share of the construction sector in GDP and capital formation.

GDP from Construction at factor cost (at current prices) increased to 1,74,571 crores (12.02% of the total GDP) in 2004-05 from 1,16,238 crores (10.39% of the total GDP) in 2000-01.

The main reason for this is the increasing emphasis on involving the private sector infrastructure development through public-private partnerships and mechanisms like build-operate-transfer (BOT), private sector investment has not reached the expected levels.

The Indian construction industry comprises 200 firms in the corporate sector. In addition to these firms, there are about 1,20,000 class A contractors registered with various government construction bodies. There are thousands of small contractors, which compete for small jobs or work as sub-contractors of prime or other contractors. Total sales of construction industry have reached 42,885.38 crores in 2004 05 from 21,451.9 crores in 2000-01.

Future Challenges

The Indian economy has witnessed considerable progress in the past few decades. Most of the infrastructure development sectors moved forward, but not to the required extent of increasing growth rate up to the tune of 8 to 10 per cent. The Union Government has underlined the requirements of the construction industry.

With the present emphasis on creating physical infrastructure, massive investment is planned in this sector. The Planning Commission has estimated that investment requirement in infrastructure to the tune of about 14,50,000 crore or US\$320 billion during the 11th Five Year Plan period.

This is a requirement of an immense magnitude. Budgetary sources cannot raise this much resources. Public Private Partnerships (PPP) approach is best suited for finding the resources. Better construction management is required for optimizing resources and maximizing productivity and efficiency.

The latest statistical data from India's Ministry of Statistics and Programme Implementation (MOSPI) show that real growth for the Indian construction industry reached 9.6% year-on-year for H110/11 (1 April 2010 to 31 September 2010). While this suggests that there is upside potential to our FY2010/11 construction forecast, we are maintaining

our projections due to persistent concerns about the sector's ability to filter investment through to intended projects. Among these concerns, India's nebulous business environment remains the most pertinent.

Poised to grow at about 15 per cent rate, the domestic construction sector will generate jobs to over 9.7 million skilled and unskilled workers by 2012, as per industry body Assocham.

The manpower requirement would be the highest in the unskilled workers segment, expected at about 60 million, followed by skilled workers at 25 million.

The necessity in specialized areas of engineers, technicians, contractors, supporting staff would be nearly 35 million, 42 million, 20 million and 32 million, as per study by the chamber on "India's Construction Industry: Growth, opportunities and constraints".

The present manpower requirement of the industry, which is growing at the rate of 10 per cent, is about 30 million. The industry is expected to become 120 billion dollars in size by 2012 from the present 70 billion dollars.

The study attributes the growth to the government's proposed 150 billion dollars investment plans in infrastructure in the coming 5-6 years, coupled with growth in other allied sectors such as transportation, urban infrastructure and irrigation.

"Mega Golden Quadrilateral and other highway projects, opening up of would be the other factors that will throw up fresh opportunities for construction companies to boost the growth pattern of the industries," as per Assocham.

Real Estate Sector

In terms of GDP contribution, Real Estate sector is estimated at around Rs. 504 billion in 2007-08. The market size of the Indian real estate sector is estimated to be around Rs. 2,643 billion in 2007-08. The sector has been growing at a CAGR of 12%. It is constituted of the Residential, Commercial and real estate activities of Special Economic Zones.

Residential

At around Rs. 2,171 billion, the housing sector is estimated to grow at 12% in the long term. Demand for housing is estimated to be around 4.8 million houses per year over the Eleventh Five Year Plan period. In addition to the need for new housing tenements, the demand is also likely to be fuelled by the housing shortages already prevalent in several

states. The shortage of housing across several states, amounts to about 25 million houses in the period of the Eleventh Five Year Plan.

Commercial/Retail Construction

The rapid growth of the Indian economy has had a significant impact on the demand for commercial property to meet the needs of business, by way of offices, warehouses, hotels and retail shopping centres. Growth in commercial office space requirement is led by the burgeoning outsourcing and information technology (IT) industry and organized retail. For example, IT and ITES alone is estimated to require 150 million square feet across urban India by 2010. Similarly, the organized retail industry is likely to require an additional 220 million square feet by 2010.

RAJASTHAN



Rajasthan is a vibrant, exotic state where tradition and royal glory meet in a riot of colors against the vast backdrop of sand and desert. It has an unusual diversity in its entire forms- people, customs, culture, costumes, music, manners, dialects, cuisine and physiography. The land is endowed with invincible forts, magnificent palace havelis, rich culture and heritage, beauty and natural resources. It is a land rich in music, Dance, Art & Craft and Adventure, a land that never ceases to intrigue & enchant. There is a haunting air of romance, about the state, which is palpable in its every nook and corner. This abode of kings is one of the most exotic locales for tourist world over. The state has not only survived in all its ethnicity but owes its charisma and color to its enduring traditional way of life.

It is one of the 28 states that, along with seven union territories, form the republic of India. So rich is the history of the land that every roadside village has its own tales of valour and sacrifice, the winds sing them and the sands shift to spread them. Rajasthan is Spicy, but then, what is life after all without little bit of spice, Rajasthan provides abundant scope to explore it.

The panoramic outlook of the state is simply mesmerizing, with lofty hills of Aravali's - one of the oldest mountain ranges of the world and the golden sand dunes of the Great Indian Desert - the only desert of the

sub-continent. No other region in the country is a conglomeration of so many paradoxes. It is a land of superlatives, everything over here is breathtakingly beautiful, impressive and fascinating. The state is well connected with other parts of the country and can be easily approached from Delhi and Bombay. Fast trains, direct bus and air connections make travel easy and comfortable.

A visit to this wonderland will leave a lasting spell on your mind. In fact, one visit is not enough to capture the real essence of this magical land.

Rajasthan is a destination that defies definition, however details are as under:-

S.NO	Item	Year	Unit	Particulars
1.	Area	2001	Sq.Km.	342239
2.	Population	2001	No.	56507188
	(i) Urban	"	"	13214375
	(ii) Rural	"	"	43292813
	(iii) Sex Ratio (No. of Female per 1000 of Males)	"	No per'000	921
	(iv) Density (Per sq. Km.)	"	"	165
3.	Cities & Towns	2001	No.	222
4.	Villages	2001	"	41353
5.	Net area sown	2003-04	Hect.	17394433
6.	Area sown more than once	"	"	4269606
7.	Gross area irrigated (P)	"	"	6393277
8.	Irrigated Area of			
	(i) Foodgrains	2003-04	"	2913672
	(ii) Oil seeds	(P)	"	1986422
	(iii) Cotton	"	"	326391
	(iv) Sugarcane	"	"	5539
		"	"	
9.	Production			
	(i) Foodgrains	2003-04	M.Tonnes	17985070
	(ii) Oil seeds	(P)	"	3995228
	(iii) Cotton (Lint)	"	"	120529
	(iv) Sugarcane	"	"	309427
		"	"	
10.	Livestock (P)	2003	'000 No.	49136
11.	Co-operative Societies	2002-03	No	22963
12.	Membership of Co-operative Societies	2002-03	'000 No.	9235724
13.	Sale value of minerals @	1996-97	'000 Rs.	3996028.88
14.	Registered SSI Units	2004-05	Lac No.	2.63

15.	Total Energy available	2003-04 (P)	MU	27675.947
16.	Roads	2003-04	Kms.	158240
17.	Educational Institutions	2004-05	No.	74034
18.	Govt. Medical Institutions			
	(i) Modern Medicines			
	Hospitals (CHC)	2004-05	No.	215(95)
	Dispensaries	"	"	209
	Aid Post	"	"	13
	MCW Centres	"	"	118
	Primary Health Centres	"	"	
	Upgraded PHC	"	"	1677(203)
	Urban PHC	"	"	29
	Family Welfare Centres	"	"	293
	Sub-Centres	"	"	10387
	(ii)			
	Ayurvedic/Unani/Homeopathic	"	"	90
	and Prakritik Institution	"	"	3686
	Hospitals	"	"	7
	Dispensaries			
	Mobile Units			
19.	Communications			
	(i) Telephone Exchanges	2004-05	No.	2341
	(ii) Post Offices			
	(a) Rural	"	"	10442 (P)
	(b) Urban	"	"	9658 (P)
	(iii) Telegraph Offices	"	"	784 (P)
	(iv) Public Call Offices	"	"	702
	(a) Local PCO	"	"	
	(b) STD PCO	"	"	7906
	(c) Village PTS	"	"	56561
		"	"	24953
20.	Village Panchayats	2004	No.	9189
21.	Panchayat Samities	2004	"	237
22.	Net State Domestic Product: Q			
	(i) At constant price			
	(Base 1993-94)	2003-04	Cr Rs.	57750
	(ii) At current prices	"	"	92339
23.	Revenue Receipts (RE)	2004-05	Cr Rs.	31432.43
24.	Revenue Expenditure (RE)	2004-05	Cr Rs.	31439.32
25.	Tenth Five Year Plan Outlay	2002-03	Cr Rs.	31831.75
	(2002-07) (At Current Prices			
	2002-03)			

26.	Tenth Five Year Plan	2002-03	Cr Rs.	4431.07
	Expenditure (2002-07) (At Current Prices 2002-03)			

RE - Revised Estimates

Q - Quick Estimate

(P) - Provisional

Economic profile of Rajasthan-

Primarily main economy of Rajasthan is agricultural and pastoral. Wheat and barley are cultivated over large areas, as are pulses, sugarcane, and oilseeds. Cotton and tobacco are cash crops. Rajasthan is among the largest producers of edible oils in India and the second largest producer of oilseeds. Rajasthan is also the biggest wool-producing state in India and the main opium producer and consumer. There are mainly two crop seasons. The water for irrigation comes from wells and tanks. The Indira Gandhi Canal irrigates northwestern Rajasthan.

The main industries are mineral based, agriculture based, and textiles]. Rajasthan is the second largest producer of polyester fibre in India. The Bhilwara District produces more cloth than Bhiwandi, Maharashtra. Several prominent chemical and engineering companies are located in the town of Kota, in western Rajasthan. Rajasthan is pre-eminent in quarrying and mining in India. The state is the second largest source of cement in India. It has rich salt deposits at [Sambhar, copper mines at Khetri and zinc mines at Dariba, Zaware mines at Zawarmala. Dimensional stone mining is also undertaken in Rajasthan: Jodhpur sandstone is mostly used in monuments, important buildings, residential buildings, etc. This stone is termed "chittar patthar".

Rajasthan is now the preferred destination for IT companies and North India's largest integrated IT park is located in Jaipur and is named as Mahindra World City . Some of the companies operating in Rajasthan include Infosys, Genpact, Deutsche Bank, NEI, MICO, Honda Sael Cars, Coca Cola, Gillette etc.

Rajasthan is often called a shopper's paradise. Rajasthan is famous for textiles, semi-precious stones and handicrafts. The attractive designs of jewellery and clothes are eye-catching and invite shoppers. Rajasthani furniture has intricate carvings and bright colours. Rajasthani handicrafts are in demand due to the intricate work on them. Above all, Rajasthan's shopping appeals to both tourists and people from other parts of [[India]] due to its cheap prices for quality goods.

Economic Growth

Secondary as well as tertiary sectors have registered rapid growth. Between 2007-08 and 2009-10, the services sector share in GSDP (at constant prices) increased from 44.76 per cent to 50.10 per cent. Per capita income at constant prices has increased by 25.9 per cent over the last five years (2005-06 to 2009-10)

Dedicated Freight Corridor (DFC)

- The 1483-km long DFC (Dedicated Freight Corridor) project to be commissioned between 2012-16 in Rajasthan, this will give the State direct market access to the entire country and also dramatically improve supply chains.
- Govt. of India has initiated the development of the Delhi-Mumbai Industrial Corridor (DMIC) along the DFC.
- About 39% of the DFC will pass through Rajasthan and as much as 46% of the total DMIC Project Influence Area (PIA) falls in the state. About 70% of the state area falls under the PIA.

Basket of Unexploited Resources

- Natural choice for mineral and agro based industries due to availability of important minerals and non cereal crops.
- Leading producer of cash crops including oilseeds and spices.
- Vast and largely unexploited mineral deposits – industrial, ceramic, fertilizer, ferrous and non ferrous.
- Rajasthan is the largest producer of milk in the country.

Pro-business Governance

- Investment friendly climate and pro-business policies are attracting numerous national and international companies to choose Rajasthan as their base in India.
- 19 well developed industrial areas: 19,544 small scale and 50 medium & large scale units.
- Mahindra World City, Jaipur: 3,000-acre business city with a 2,500-acre multi-product SEZ; India's largest IT SEZ.
- INR 3.5 billion World Trade Park under construction.
- Major base of exporters of apparels, gems & jewellery, dimensional stones, carpets and handicrafts.
- Political stability has translated into a peaceful law & order situation, favorable labour relations, and consistent thrust on progressive policy reforms.

Great Place to Live

- Unique cultural heritage makes Rajasthan one of the most favored destinations globally for foreign tourists.
- Unparalleled attractions: Majestic forts and palaces, picturesque Thar Desert, get away sanctuaries, colourful fairs, festivals and fascinating handicrafts and cuisines.
- Rajasthan also has one of the finest 5 star and luxury hotels in the world.

Real Estate in Rajasthan:

With saturation setting in the metros, the real action is now heating up in emerging cities. Rajasthan, with its well planned cities, and further initiatives for urban development is attracting prestigious projects. Reasonable land prices and good policy environment have attracted many leading real estate companies to Rajasthan.

Major Existing Players

- Vatika
- Parsavnath
- Omaxe
- DLF
- Gold Souk

SEZs in Rajasthan:

Rajasthan's location, with proximity to the Delhi International Airport and ports of the western coast, makes it an ideal location for export-oriented industrial development on a large scale. Most of this passage is already well connected through 4 to 6 lane highways.

40% of the proposed Delhi-Mumbai freight corridor will pass through Rajasthan throwing up enormous possibilities for development of industrial belts such as special economic zones along the corridor. Five SEZs with an expected investment of ₹.165.15 billion have already received formal approval. These are:

- Mahindra World City (Jaipur) Ltd., Jaipur
- Somani Worsted Ltd., Khushkeda, Bhiwadi, Alwar
- Genpact Infrastructure (Jaipur) Pvt. Ltd., Jaipur
- Vatika Jaipur SEZ Developers Ltd., Jaipur
- Mansarovar Industrial Development Corporation, Jodhpur

Urban Infrastructure in Rajasthan:

A number of ambitious infrastructure projects have been undertaken by the State Government in recent past. Setting up of the Bus Rapid Transit System (BRTS), Metro Rail, and Ring Road are some projects in the pipeline for Jaipur city. The Jaipur Development Authority has also chalked out plans for a world-class city, called New Jaipur. Urban infrastructure holds immense potential, given the scope of infrastructural development in the urban cities of Rajasthan.

Challenges

Rajasthan undoubtedly is grappling with the problem of unemployment. So far, the majority of the unemployed labour force has been skilled or semi skilled. Now, we need to take effective measures to generate employment otherwise the educated semiskilled and unskilled unemployed would be the single largest casualty of the challenges of

new millennium. Agriculture which is the principal occupation in the rural Rajasthan is by nature a seasonal occupation. The period of seasonal unemployment varies from region to region depending upon the method of farming, the condition of the soil, types of crops grown and many other factors.

Hence, a holistic approach is required to address the problem of unemployment and skill shortage in Rajasthan. In order to transform this unemployed labour force into skilled manpower and also to meet the aspirations of large number of school drop outs, the employment oriented skill Training and development program is an important measure to address these issues.

HARYANA



History and Geography

Haryana has a proud history going back to the Vedic Age. The State was the home of the legendary Bharata dynasty, which has given the name Bharat to India. Haryana finds mention in the great epic of **Mahabharata**. Kurukshetra, the place of the epic battle between the Kauravas and the Pandavas, is situated in Haryana. The State continued to play a leading part in the history of India till the advent of the Muslims and the rise of Delhi as the imperial capital of India. Thereafter, Haryana functioned as an adjunct to Delhi and practically remained anonymous till the First War of India's Independence in 1857. When the rebellion was crushed and the British administration was re-established, the Nawabs of Jhajjar and Bahadurgarh, Raja of Ballabgarh and Rao Tula Ram of Rewari of the Haryana region were deprived of their territories. Their territories were either merged with the British territories or handed over to the rulers of Patiala, Nabha and Jind. Haryana thus became a part of the Punjab province. With the reorganisation of Punjab on 1 November 1966, Haryana was made into a full-fledged State.

The State is bound by Uttar Pradesh in the east, Punjab in the west, Himachal Pradesh in the north and Rajasthan in the south. The National Capital Territory of Delhi juts into Haryana.

Agriculture

Agriculture is the mainstay of more than 65 per cent population in Haryana with contribution of 26.4 per cent in GDP of the State. The quantum of food grain production, which was nearly 25.92 lakh tonnes at the time of inception of the State, was likely to touch 155.08 lakh tonnes in 2008-09 due to crop intensification and increase in production of principal crops. Rice, wheat, jowar, bajra, maize, barley and pulses, sugarcane, cotton, oilseeds and potato are the major crops of the State. Under the diversification of crops, more and more area is being brought under cash crops like sugarcane, cotton and oilseeds, vegetable and fruits. Sustainable agriculture is being promoted through the propagation of resource conserving technologies and organic farming. Dhaincha and Moong have also been encouraged to maintain soil fertility.

Industry

Haryana has a large industrial base having more than 1,347 large and medium and 80,000 small scale units in the State. Haryana is the largest producer of passenger cars, tractors, motorcycles, bicycles, refrigerators, scientific instruments, etc. Haryana is the largest exporter of Basmati rice to the overseas market. Panipat handlooms and carpets are known all over the world besides, the famous **Pachranga Achaar**.

Since July 1991, 3914 Industrial Entrepreneur Memorandum (IEMs) were filed and up to May 2008, of these 2274 IEMs were implemented with Capital Investment of **Rs.24,034** crore and generating employment for 4,02,129 persons. As a result of the new Industrial Policy, the State has received about 100 proposals for setting up of SEZs in the State which is envisaging an investment of **Rs.2.00** lakh crore in the industrial infrastructure. These projects on implementation would create several thousand crore investment in the industrial sector besides, generating huge employment. The State is developing industrial model townships at Kharkhoda, Faridabad, Rohtak and Jagadhari besides expansion of IMT Manesar in Gurgaon. Petrochemical Hub is coming up with investment of **Rs.33,000** crore at Panipat. Kundli-Manesar-Palwal Expressway is being developed with an investment of **Rs.2000** crore. This will create a large number of economic hubs all along the expressway generating new investment opportunities in the industrial and service sector.

There is a great demand from industries for allotment of industrial land in the industrial estates developed by the HSIDC and HUDA. During this period of the present Government, 98 new industrial units in the large and medium sectors and 7683 new small-scale industrial units with investment of **Rs.2744** crore have been set up generating direct employment for more than 1,25,747 persons. Besides, a large number of industrial units have undergone expansion and as a result of it, fresh investment of more than **Rs.35,000** crore has been created. Recently, Indian Oil Corporation has set up Paraxylene/PTA project at Panipat with an investment of about **Rs.5000** crore. Maruti Udyog Hero Honda and many other automobile ancillaries are undergoing expansion programme with investment of about **Rs.10,000** crore. At present, investment proposals of about **Rs.70,000** crore are under implementation in the Industrial Sector.

Haryana is home for major IT companies. Gurgaon has been developed as a preferred investment destination for both IT and ITES/BPO companies. Now, Gurgaon has become the home of the corporate world in India. The State Government is planning to set up Hi-

Tech Habitat Centre in the Electronic City in Gurgaon for IT/ITES/BPO companies, which would provide world-class facilities. Besides Gurgaon, the State also intends to develop other areas in NCR region, especially those alongside the Kundli-Manesar-Palwal Express Highway and Faridabad, as satellites of Gurgaon-Manesar Mega IT Hub. The software exports from Haryana during 2007-08 were **Rs.17,500** (approximately) crore.

Infrastructure

- Enterprising plan to bridge demand and supply gap of power. Different projects to generate 5,665 MW of power launched and MoU signed.
- 17 new sub-stations and 6,500 new transformers installed to improve the distribution system.
- Work initiated for 1065 MW gas-based plant and 1000 MW coal-based plant at Faridabad. Construction in progress at 600 MW coal-based plant at Yamunanagar.
- Proposal sent to Government of India to build a 4x700 Nuclear Power Plant at Fatehabad.
- Plan to generate additional 1,400 MW electricity through non-conventional sources.
- Ambitious scheme for developing the infrastructure of Faridabad launched under 'Jawahar Lal Nehru National Urban Renewal Mission'. Rs. 2,064 crore to be spent.
- Drinking water supply augmented in 634 villages, colonies of Scheduled Castes in 421 villages and 22 towns.
- Works in progress to augment drinking water supply in 503 villages of Mewat area at a cost of Rs. 206 crore. 207 tubewells and five boosting stations installed.
- Construction work started for 135 kms. long Kundli-Manesar-Palwal Expressway to connect National Highway No.1, 2, 8 and 10. Rs. 147 crore paid for land acquisition.
- Construction of 407 kms. long new roads and improvement of 3,540 kms. roads completed at a cost of Rs. 449.14 crore.
- Work started for four-laning of Delhi-Rohtak Highway (NH-10), Zirakpur-Ambala National Highway, Zirakpur-Kalka Highway and Gurgaon-Faridabad Road.
- Work in progress for 6/8 laning of Gurgaon-Delhi Highway (NH-8) at a cost of about Rs.775 crore.
- Work started for elevated Highway at Badarpur and Panipat for decongesting traffic.
- Extension of Delhi Metro to Gurgaon in progress.

Major infrastructure development initiatives

SEZ Garhi Harsaru

As a sequel to the new Industrial Policy announced by the Govt. of Haryana. Govt. of India has approved in principle the setting up of a Special Economic Zone (SEZ) near Garhi Harsaru in District Gurgaon. The SEZ is being set up in two phases over an area of 3000 acre at an estimated cost of Rs.2060 crore. The SEZ, which is being set up by HSIIDC would help in accelerating growth-led development besides promoting Foreign Direct Investment (FDI) and resultant exports. The scheme was introduced in the Exim Policy 2000 with a view to provide hassle free environment for export production. The focus of SEZ is to remove restrictive export-import regulations, ensure trade liberalization, simplify procedures relating to administration of foreign trade and provide incentives to certain export categories to generate exports from the country.

The proposed SEZ will be a duty free enclave and a deemed foreign territory where no license would be required for imports. The import of capital goods, raw materials, consumables etc. and their procurement from the domestic market will be exempted from customs duty and central excise. The supplies from Domestic Tariff Area (DTA) to SEZ units will be treated as deemed exports. 100% FDI in manufacturing sector will be allowed through automatic route for the projects being set up in SEZ and the profits earned by these units will be allowed to be repatriated freely without any dividend balancing requirement. In addition to above the goods imported or procured locally without the payment of duty shall be utilised over the approval period of 5 years. The SEZ units will be provided in-house custom clearance and no separate documentation would be required for custom and Exim Policy.

The proposed site is on the State Highway leading from Gurgaon to Pataudi abutting the Delhi-Jaipur National Highway. The SEZ has been planned to cater to a wide spectrum of target segment such as; automobiles and auto components, high precision industries, textiles and readymade garments, pharmaceuticals, IT industry, white goods and light engineering goods. The project has been conceived to be developed as an integrated self-contained industrial township with a flyover on NH 8 to provide free flow of traffic. Industry related infrastructure of truly international standard shall be provided in the form of wide roads, dedicated electrification, water supply, storm water drainage, common effluent treatment plant etc.

1715 acres of land for the first phase of this project is in an advanced stage of acquisition and the process to acquire the land for the second phase is being initiated shortly. About 2400 units would be set up in this

township providing direct employment to more 60,000 workers. When implemented, these units are expected to generate export earnings to the tune of Rs.42,000 crore

Reliance Haryana SEZ - Country's the largest SEZ

Reliance has incorporated a company by the name of Reliance Haryana SEZ to set up this multi-product zone. The 25,000-acre SEZ is tipped to be India's largest.

Apart from basic industries, the project will attract next-generation businesses like bio-technology. Of the total area of the SEZ, 6,500 acres have been earmarked for low-polluting industries, 5,000 acres each for basic infrastructure and commercial establishments, 3,750 acres for residential purposes and 1,250 acres each for institutional area, leisure and entertainment.

The idea is to develop the critical mass. Development of infrastructure is a continuous process but considering that the project would be developed over an area of 25,000 acres, the investment could anywhere be between Rs 25,000-40,000 crore. The competition of this SEZ will not be with the SEZs of other states. We would be competing with the most favoured investment destinations such as Singapore, Malaysia, Dubai and China.”

The SEZ by Reliance would be in addition to nine SEZs already approved in principle by the Central Government in Haryana. The areas that could be successfully developed in this SEZ are automobiles, auto components, agro based industry, biotech, IT and garments, strive to get the best of the Fortune 500 companies to invest.

KMPE

Development of the Global Corridor: Kundli-Manesar-Palwal (KMP) Western Expressway

For the development of world-class infrastructure in the state, Government of Haryana has plan to develop the Global Corridor along Kundli-Manesar-Palwal (KMP) Western Expressway. In this corridor, top class infrastructure facilities that will be at par with international standards are being created. These are meant to meet not only the needs and dreams of the investors but also those who will be living there. Further, there will be a number of specialized economic activities in this corridor, making it growth centric. Each lead economic activity is envisaged to be the focus of a self sustaining specialized and independent cluster city. A number of such cluster cities integrated under one umbrella will provide the overall spatial form of the global

urban corridor. In between these nodes, recreational, forest and green area will be developed.

The Expressway will enable strong linkages between the industrial units in the SEZ and the industrial concentrations, within the Haryana Sub-Region of National Capital Region. The Express highway linking the National Highway NO.1, 10, and 8 by passing the National Capital Territory Delhi has been proposed for spatial integration. The project has been envisaged for better coordination and administrative convenience. These industrial concentrations are given as under: Panipat-Sonipat_kundli Industrial Corridor on National Highway No.1. Bhadurgarh-Rohatak Industrial Corridor on National Highway No.10. Gurgaon-Manesar-Bawal Industrial Corridor on National Highway No.8. Faridabad-Palwal Industrial Corridor on National Highway No.1-A.

The Express Highway Project linking these National Highway has been conceived to be co-terminus with SEZ. Once these two projects take shape on the ground simultaneously, the proposed SEZ shall definitely act as catalytic of Regional Development

New Cities

In Haryana three new townships near:

- Sampla
- Badli-Jahangirpur
- Ganaur-Samalkha

are to be developed with most modern transport system to all these areas on the pattern of modern townships. They will not only help in decongesting the national capital but in the process, also become growth engines for development of the surrounding areas.

PUNJAB



Punjab, the richest state in India that throbs with the vibrant culture of equally vibrant people, has always moved on the path of prosperity despite all odds. A state where dreams of moving with the times have blossomed among the lush green fields and fertile soil. With its inimitable style of transforming every potential opportunity into a success story through enterprise and endeavor Punjab has always been at the forefront in the development story of India. Punjab – The Food basket and Granary of India", has been awarded National Productivity Award for agriculture extension services for consecutively ten years from 1991-92 to 1998-99 and 2001 to 2003-04. Punjab is now well on its way to rapid industrialization through coordinated development of Small, Medium and Large scale industries. Punjab has been declared one of the best States in India in terms of rail, road and transport network as per National Council of Applied Economic Research (NCAER), 2007. Ludhiana (Punjab) has been adjudged as the best place for doing business in India as per the World Bank Study, 2009. With the up-gradation of Amritsar International Airport & another International Airport coming up in Mohali, Punjab is geared to be one of the finest and easily accessible tourist as well as business destinations in South Asia. State

Government has undertaken setting up of new power projects at Gidderbaha, Talwandi Sabo, Rajpura and Goindwal Sahib which will make Punjab a power surplus state by 2012. Punjab is already home to many large Indian Companies & MNCs like Ranbaxy, Hero Group, Avon Cycles, Gujarat Ambuja, Trident Group, Rail Coach Factory (Kapurthala), Sonalika, M & M, Godrej, Phillips, Oswal Woolen Mills, HCL, Nestle, Smithkline Beecham, ICI, Quark, Dell, IDS Infotech, etc. to name a few. The State of Punjab is today ranked as one of the most progressive States of the country. With the State's GDP growing at a rate of 13%,

Punjab has the 5th highest per capital income. The State has one of the best infrastructure both in terms of physical and support infrastructure and a large number of projects have been envisaged by the Government. Punjab offers conducive business environment with Ludhiana being adjudged as the best place for doing business in India as per a World Bank Study conducted across 17 cities of India.

Punjab has a large pool of educated workforce with a large network of schools and colleges. The State has many prominent technical institutes such as IIT Roopnagar, National Institute of Technology (NIT), Jalandhar and Thapar Engineering College, Patiala. Knowledge City spreading over 380 acres is being developed in Mohali that would constitute of well established institutes such as IISER, NIPER and proposed NABI, ISB, and Indian Institute of Nano Science and Technology.

The State has thriving industrial estate with a health mix of small and large scale units. The State has identified IT as one of the thrust areas and has proposed development of SEZs in Roopnagar, Kapurthala and Railmajra. Punjab is also home to several prominent entrepreneurs.

Regions:

The area of Punjab can be divided into **Malwa** is a region of Punjab and parts of Haryana between the Sutlej and Yamuna rivers. People of Malwa are known for being great fighters, and warriors. The Malwa area makes up majority of the Punjab region consisting 11 districts. Cities such as Ludhiana, Patiala, Bhatinda and Mohali located in the Malwa region **Majha** is a historical region of the Indian Punjab comprising the modern districts of Amritsar, Gurdaspur and Tarn Taran. It lies between two of the five great rivers of the Punjab: the Ravi and the Sutlej. **Doaba** is the region of Indian Punjab surrounded by the rivers Beas and Sutlej. The name "Doaba" literally translates to "land of two rivers" ("Do" two, "Ab" river; Punjabi). It is one of the most fertile regions of the world, and was the centre of the Green Revolution in India. To this day, it remains one of the largest per capita producers of wheat in the world. The biggest cities in Doaba are Jalandhar, Hoshiarpur, Adampur, Nawansher and Phagwara.

Facts and Figures:**Geographical area**

The geographical area of Punjab is 50,362 sq. km (1.5% of India's total IT lies in North-west of India. Its average elevation is 300 m from the sea level.

Location

Punjab extends from the latitudes 29.30° North to 32.32° North and longitudes 73.55° East to 76.50° East. It is bounded on the west by Pakistan, on the north by Jammu and Kashmir, on the northeast by Himachal Pradesh and on the south by Haryana and Rajasthan. Due to the presence of a large number of rivers, most of the Punjab is a fertile plain. The southeast region of the state is semi-arid and gradually presents a desert landscape. A belt of undulating hills extends along the northeastern part of the state at the foot of the Himalayas

State Capital

The state capital of Punjab is Chandigarh

Cities/ Towns

There are 14 cities and 157 towns in Punjab. Punjab has some very valuable historical, colorful great cities .The major cities in Punjab are Ludhiana, Jalandhar, Amritsar, Patiala, Mohali, Bathinda. The State of Punjab in western India is one of the most fertile regions of the earth. The cities have rich culture of self dependence, self reliance and hard work.

Literacy Rate The literacy rate in Punjab is 69.7%

Literacy Rate	Male	Female
General	75.23%	63.36%

Urban-Rural ratio

Being an agricultural state, a large part of the population lives in the rural area. Approx. 66% of people live in rural areas while the rest 34% is urban resident.

Sex ratio

Sex ratio defined as number of females per 1000 males in the population. According to the 2001 census there are 876 females per 1000 males in Punjab.

Economic Snapshot:

Gross State Domestic Product (2008-09): Rs. 1,03,825 cr (Q)* (at constant prices 1999-2000)

According to the 2008 Global Hunger Index, Punjab has the lowest level of hunger in India. The Per Capita Income for (2008-09) : Rs. 33,198 (Q)* (at constant prices 1999-2000) (National average of Rs. 24,295).

In 2007-2008, Punjab ranked second amongst fifteen major States in India in the Human Development Index (HDI) that provides a composite measure of the three dimensions - life expectancy, adult literacy and standard of living - of Human Development. Human Development Index (2001): 0.537 (Rank 2nd among 15 major states)

The Total investment in industry during (2008-09) was Rs. 40,500 cr. Of late, Punjab is aggressively promoting the services sector, particularly the Information Technology and Biotechnology sector.

Major Road projects:

Punjab is the first state in India with 100% connectivity to rural roads with metalled roads. In order to provide world class infrastructure of road throughout the State, the Government has started many projects through its infrastructure development board:

- 6-laning of Shambu-Jalandhar highway underway.
- 4-laning of six other major highways to be completed by 2010.
- State-of-the-art Ludhiana City Expressway with a project outlay of Rs. 400 cr.
- 45 RoBs (20 at execution stage and 25 at planning stage) with project outlay of Rs. 700 cr.
- Completion of 9 road projects at a cost of Rs. 653 cr.
- Development of Delhi-Mumbai Industrial Corridor extension to Ludhiana.
- Proposed Expressway at Ludhiana Connecting NH- 95 to NH-1 on west of Ludhiana

Power Initiatives:

Punjab is projected to become a power surplus state by 2013

The State Government is conscious of the fact that adequate, assured and reliable Power is key to the growth of Industry. State Government has undertaken setting up of new power projects at Rajpura, Gidderbaha, Talwandi Sabo and Goindwal Sahib which will make Punjab a power surplus state by 2012.

The new power plants are being promoted through Private Sector Participation on Build, Own, Operate basis.

In addition, the State proposes to develop 29 biomass power projects by 2010 and Asia's biggest solar power project in Hoshiarpur by Punjab Energy Development Agency to promote the development of non-conventional sources of energy.

Urban Development Initiatives:

Planning for the future, the Government of Punjab has prepared a Master Plan for Mohali and the catchment areas - Greater Mohali Area Development Authority (GMADA). The regional plan for the entire Greater Mohali area and master plans of six local planning areas submitted by Jurong International Consultants, Singapore within the jurisdiction of GMADA, namely Mullanpur, S.A.S Nagar, Kharar, Banur, Dera Bassi and Zirakpur has already been finalized.

The Master Plan of City Centre Sector 62, SAS Nagar is being finalised to create a world class Central Business District (CBD) in Mohali.

Mullanpur is being developed as the first "Eco Town" of Punjab. Approval has been granted to master plan of Mullanpur Local Planning Area to develop 15,130 acres of land spread across 33 villages on the outskirts of Chandigarh. According to the plan, industries in Mullanpur will be catering to service-oriented businesses such as IT, health and tourism. Apart from these, the Master Plans of Kharar and Banur are in pipeline.

Thriving Business opportunities:

Other major cities of Punjab are witnessing a similar move towards planned development as modern cities of futuristic India. Amritsar plans for the development of Central Business District. Similar statutory city Master plans being developed for key cities through global EoI for city up gradation & beautification. of Ludhiana, Amritsar, Kapurthala /Jalandhar, Bathinda and Mohali.

The Small Scale Industries comprises of 1, 59, 210 units and dominates roughly 46% of the production, 60% of exports and 20% investment of the industrial sector in the State. The sector generates 3.5 times the employment generated by the medium and large industry.

Thrust areas of Punjab are:

Agro & Agro processing Industry that contributes nearly 20% to the manufacturing output and about 14% to the employment. Light Engineering Industry that Contributes 21% of manufacturing output and 25% of industrial units in the country.

Auto & Auto Parts Industry that accounts for around 10% of the total auto component production in India.

Textile Industry that accounts for 40% of the total exports from the State.

Chemicals and Petrochemicals that contributes more than 5% to the entire industry in India. Also development of Hindustan Petroleum Corporation Ltd refinery project in Bhatinda has been proposed.

Punjab Apparel Park with a total investment of Rs 355 cr at Doraha Distt, Ludhiana.

Pharmaceutical and Bio Technology Industry that has a turnover for Pharma Products in Punjab is more than Rs. 2,000 cr annually well established Biotech Policy to promote the growth of biotech industry.

IT & Electronics Industry: Mohali is the key IT and Electronic Cluster of Punjab. As many as 304 units registered with STPI Mohali with export to the tune of Rs. 725 crore in 2008-09. Major players like HCL Infosystems, Quark, Dell and First Source have their presence in the State. Punjab Infotech, the nodal agency for development and promotion of IT in the has started the development of IT Incubation Center with TiE* and STPI at Mohali, along with proposed development of IT Park/ SEZ at Kapurthala, Ropar, Rajpura and Rail Majra.

IT SEZs/Parks – Developed and in pipeline:

- IT Park at Sector 67, Mohali
- Eltop IT Park, Mohali
- Quarkcity, Mohali
- YellowStone Landmark Infocity - An integrated IT Township at Mohali
- Integrated Global Industrial & Knowledge City at Rajpura, Patiala
- TechKnow Park, Ropar
- IT/ Knowledge Industry Park at Kapurthala, Jalandhar
- Emerging Knowledge Corridor, IT Park at Railmajra, Roopnagar
- IT Park at Snetta, Mohali

NEW MEGA HOUSING PROJECTS (APRIL 2007 ONWARDS)

Promoter/Company	Location of Project	Area
Spark Buildcon Pvt.Ltd.	Ludhiana-Ferozpur Road V. Mullanpur and Talwandi Khurd Ludhiana	225 Acres
Omaxe Buildhome Pvt.Ltd	V. Amargarh Bokhra & Nahiawala Bhatinda	71.81 Acres
Golden Peak Township Pvt.Ltd.	Kansala,Parol,Kartarpur, Ranimajra Takipur, Boothgarh, Dhodemajra,Rasoolpur and Bhagat Majra in Mullanpur	175 Acres
D.S.K. Realators Pvt.Ltd.	Ajnala Road, Amritsar	100+50 acres
D.L.F India Ltd. Mullanpur LPA GMADA	Vill. Devinagar Salamatpur,Bharonjian And Ratwara in Mullanpur Planning area GMADA	150 acres
Janpath Estates Pvt. Ltd	Vill. Birmi and Bains	112 acres
Greater Pb officers Cooperative House Building Society Ltd and Altus Space Builders(Pvt) Ltd. Mohali.	Vill. Salamatpur, Rasulpur, Dhode Majra and Saini Majra in Mullanpur Planning Area in GMADA. Pb	170 acres

SWOT ANALYSIS

POSITIVE		NEGATIVE	
Internal Factors		Internal Factors	
<ul style="list-style-type: none"> • Punjab, Haryana, and Rajasthan are prosperous states • Many infrastructure and real estate projects are being implemented • Modern and growing cities like Chandigarh, Mohali, Jalandhar, Ludhiana, Gurgaon, Faridabad, Jaipur, Jodpur, Udaipur etc located in these states. • Massive building construction means large scale plumbing projects 		<ul style="list-style-type: none"> • Training infrastructure for construction workers is almost negligible • BPL youth in all three states lack resources and guidance for career and jobs and hence land up doing odd jobs without a clear career path • Quality of workmanship in civil works needs a lot of improvement in view of modern construction material and technologies • Plumbers still use old methods of plumbing 	
OPPORTUNITIES		THREATS	
External Factors		External Factors	
<ul style="list-style-type: none"> • Lifestyle improvement has resulted in building of modern houses. • NRIs in Punjab invest a lot of money in property • Growing tourism in Rajasthan has resulted in development of many hotel projects • Due to proximity with Delhi all three states are witnessing boom in real estate development • Due to linkages of people from Punjab with overseas countries through NRI relatives opportunities for job abroad are good 		<ul style="list-style-type: none"> • Even better job opportunities in other cities has resulted in migration of labour • Aspiration levels and attitude to do only comfortable jobs has led to non availability of manpower in construction sector 	

Analysis - Focus states and selected Course:

As evident from above figures construction sector in India and particularly in focus states is full of opportunities due to rapid growth. Major infrastructure projects are coming up in all three states. Due to the proximity with Delhi a large number of commercial establishments have shifted to bordering townships of NCR region which fall in these states. This has resulted in massive construction both commercial as well as residential. Gurgaon has emerged as a hub of multinational companies and IT estates. Faridabad, Bhiwadi, Sonipat and Panipat have also witnessed a large scale growth in industry as well as real estate.

Other cities like Chandigarh, Jaipur, Ludhiana, Jalandhar, Jodhpur, Udaipur, Rohtak, are also progressing well and growing by the day.

Though the above cities are marching ahead and developing fast but the rural areas in adjoining districts is witnessing no signs of improvement. Youth are unemployed and lack facilities and support for making a promising livelihood. Large pockets of poverty can be seen in border districts of Punjab in districts like Gurdaspur, Ferozpur and Taran Taran. Similarly Alwar, Ajmer, Rewari, Jajhar etc are well below the levels of reasonable good social index. In some border areas of Punjab it was found that youth fall prey to bad habits like consuming drugs and also indulge in anti social activities including smuggling. In traditional skill pockets of Punjab like Taran Taran boys are drifting away from jobs which their family has been practicing from ages due to lack of guidance.

SURVEY FINDINGS

Survey was conducted through a survey form appended in the report and following points were observed.

Nature of Business:

The companies approached for this survey were mainly into following business activities:

- Consultants
- Plumbing contractors
- Plumbing material manufacturers
- Sanitary ware manufacturers & suppliers
- Traders of Plumbing material
- Product servicing
- Architects & Interior Designers
- Fire fighting contractors
- HVAC contractors
- Water treatment consultants & contractors

Manpower requirement in future:

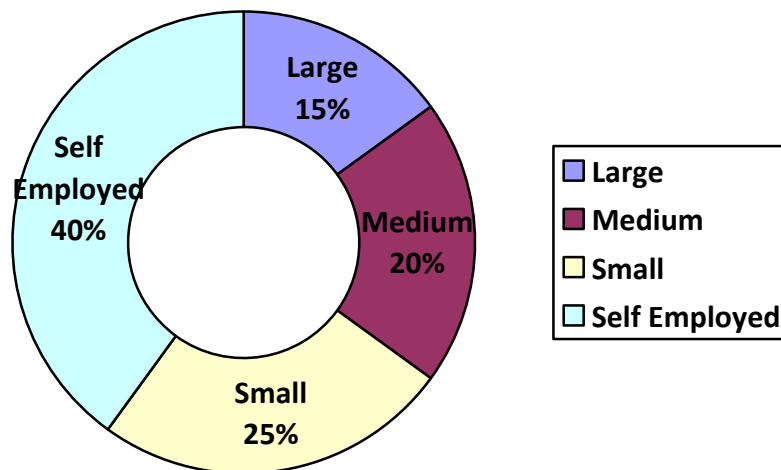
The companies surveyed were of all sizes and scales. Large HVAC contractors like Bluestar, Sudhakaran Nair & Co, ETA, Hindware etc employ more than 500 plumbers. The number of such companies is about 25 to 30 all over India. The next level of companies are those who employ between 50 to 500 worker and the number of such companies is about 100 to 150. Companies who employ 10 to 50 plumber is very large and will run in thousands all over country.

The requirement of plumbers in these three catagories is as under :

- Large : About 100 to 400 in each company per year
- Medium : About 50 to 100 in each company per year
- Small : About 10 to 50 in each company per year

Though it is difficult to assess the exact numbers of plumbers required all over India in one year but it is estimated that more than 4000 plumbers are required in the three focus states in next one year.

Plumbing Manpower Absorption ratio in Plumbing Industry



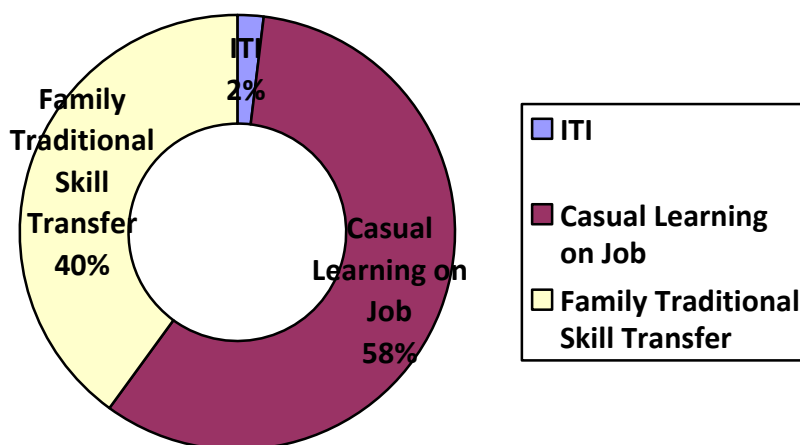
Skill sets/Competency of a worker at entry level required by employers:

In the prevailing situation it was found that only ITI trained candidates were the ones who approach job markets at entry level with formal training background. This consists of less than 5 % of the plumbers. Rest of the manpower is being either trained by plumbing companies themselves through on job training or they come from families or communities who have been traditionally working in this area. For example a sizeable segment of manpower comes from Orrisa where many communities carry this skill through tradition.

It was found that even ITI trained plumbers also had many shortcomings due to the poor quality of training provided by such institutes. The courses run by ITI lack basic connect with modern plumbing practices and the industry requirement. They also lack practical knowledge which is extremely important. Due to this reason large plumbing material companies conduct a refresher course for already working plumbers to give them exposure on new materials and technologies

Based on our interaction with industry it was observed that they require manpower with hands on practical experience of working on plumbing material and sanitary fittings. They are ready to induct workers with a short term training provided the course material is in line with their requirement and the trainee has a good practical experience.

Plumbers Evolution in Indian Market

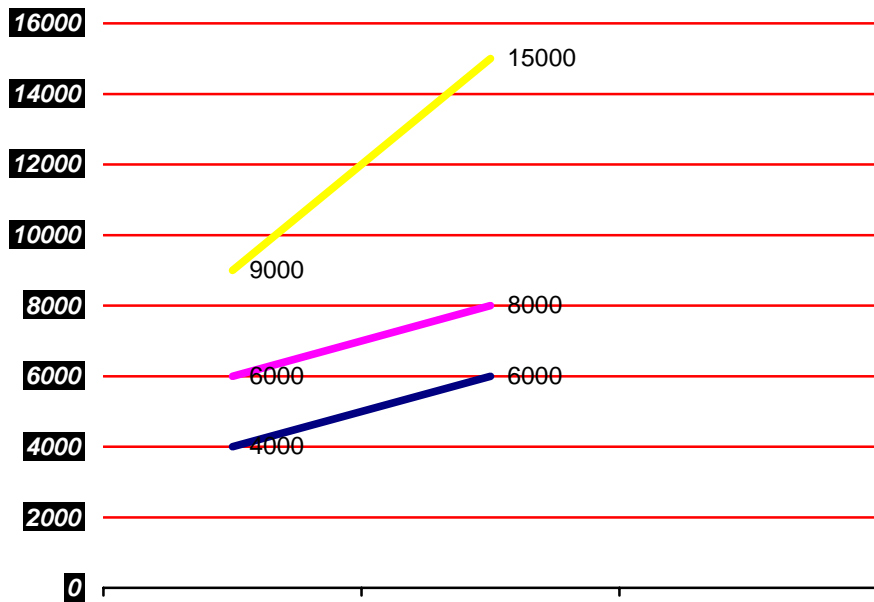


Wages:

The wages vary from city to city and from one employer to another. But a trained plumber will surely earn more than Rs 4000 per month if he is ready to work hard and is willing to move out to a large city. Some employers are ready to offer accommodation also for first few months.

It is for sure that if a beneficiary undergoes the training programme with sincerity and works for couple of years with a plumbing company to gain practical experience his livelihood is secure for entire life. After two years if he switches over to self employment he will earn a decent living. A plumber of more than 5 years earns more than Rs 15000 in a level A & B city. Jobs in small town are also available for such trained workers.

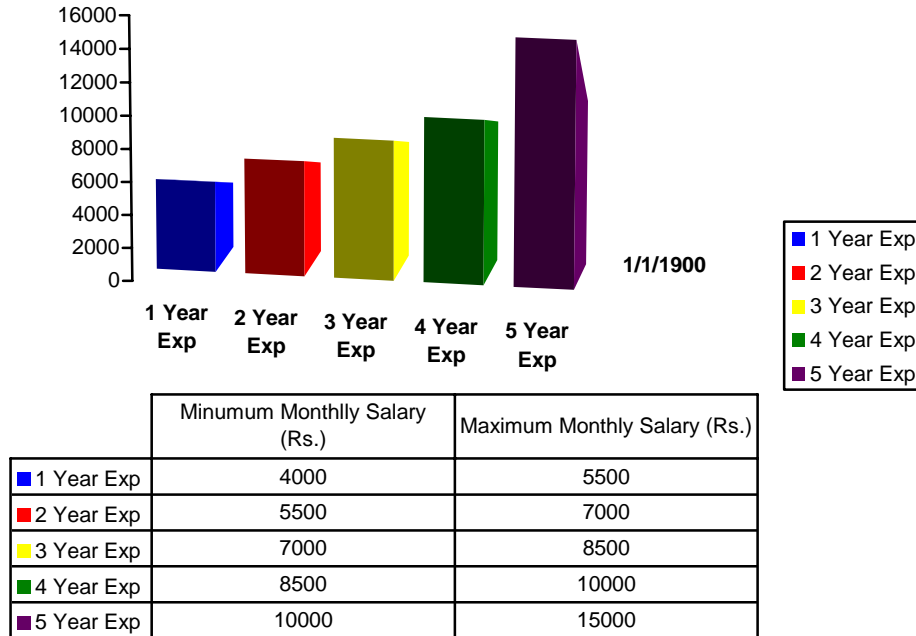
Wages and Growth (Rupees)



Entry Level (Rs.)	4000	6000	
Skilled with 2 yrs Exp (Rs.)	6000	8000	
Vey Skilled/ Supervisory Level (Rs.)	9000	15000	

Entry Level (Rs.) Skilled with 2 yrs Exp (Rs.) Vey Skilled/ Supervisory Level (Rs.)

Year Wise Growth Chart in terms of Wages (Rupees)



Attrition:

Attrition with large companies is about 20 to 30% and with medium and small companies it varies between 40 to 50 %

Support from Industry;

Industry is willing to support this project and provide job linkage. They are also willing to help by way of guest lectures, OJT and exposure on new materials.

Challenges

- Tough Working Conditions at Entry Level
- Home Sickness due to Displacement
- Industry is in formative stage of getting organized till it becomes more organized the workers will not get benefits of oragnized sector
- Lack of Formal Training Infrastructure
- Existing Formal institutes lack training infrastructure and curriculum as per the market requirements
- Lack of awareness among working class about plumbing

Meetings conducted for Market Survey

Mr Sudhakaran Nair
President
Indian Plumbing Association &
Executive Board Member World
Plumbing Council
Managing Director
Essenco Ltd
Bangalore

Mr B S A Narayan,
Vice President
Indian Plumbing Association &
Principal Consultant
Potential Service Consultants (P)
Ltd
Bangalore

Mr Amit Naik
General Manager (HR)
Blue Star Ltd
Mumbai

Mr C S Gupta
Honorary Secretary
Indian Plumbing Association &
Gem Sanitary Appliances Pvt Ltd
Delhi

Mr H R Rnganath
Director
SEMACE Private Ltd
Bangalore

Mr Manoj Dhar
Business Development Manager
India
Lubrizol Advanced Materials
India Pvt Ltd
Mumbai

Mr Subhash Deshpande
Director
International Association of
Plumbing and Mechanical
Officials India
Pune

Mr Sharad Mathur
Managing Director
GEBERIT Plumbing Technology
India Pvt Ltd
Bangalore

Mr S K Duggal
Director
Northern Sanitation Company
New Delhi

Mr V S Krishnan
Technical Advisor
Supreme Industries Ltd
Delhi

Mr. R.K. Neggi
AGM Erra Infotech, Jhaaaarli
Power Plant Jhajjar

Mr. Ashok kumar
AGM Byana Builder Jharli Power
Plant Jhajjr

Mr Mukesh Kumar
Site Incharge, NISHA , Jharli
Power Plant Jhajjar

Mr Pradhan
M/S Pradhan & Co. Plumbing&
Fire Fitting Contractor Rewari.

Mr. NRU Singh Swain
Plumbing & Fire Contractors,
H.No.1113/H1,Dayanand
Colony, Near Old Rly.Road,
Gurgaon.

Devender Kumar
Site Engg. Dahiya Construction,
Jhajjar

Mr. T.K. Pranami
AGM Suman City Jhajjr, Suman
Prnami Tower, Old Judicial
Complex, Gurgaon

Purshotam Lal
CPM,B.L. Gupta Construction
Co.II-A-21, Feroze Ghaandi road,
Lajpat nagar, New Dheli-110024

M.K. Sharma
DLF,Project Badshapur,
Manesar, Gurgaon

Lalan Yadav
N.G. Costruction Co. Manesar,
Gurgaon

Rambir Singh
Site Incharge, D.S. Construction
Co. Manesar, Gurgaon

Er. Bhupinder Singh Sidhu
GM , Jagrit Infrasture PVT. LTD,
Bhiwari (Raj.)

Mr. Deepak Kumar
Bestech Construction Co.
Bestech City Dharuhera, Rewari.

Mr. Tappan
Site Incharge
Om Fire & Plumbing Co. Sector-
7 ,Bestech City Dharuhera,
Rewari.

Mr. P.K. Sharma
M2K City,Sector-7 , Dharuhera ,
Rewari

Mr. Subash Chand
Pumbing Contractor,
Sushant City Dharuhera, Rewari.

Mr. Mukesh
Sarda Hardware Store ,Delhi.
U-25, Pink Town House, DLF ,
Gurgaon.

Mr.Pawan Gupta
Assonic Plumbing Company
Vatica City ,Gurgaon.

Mr.Naveen Yadav
Sr. P. M. DLF Home Developer
Ltd.
Gurgaon

Mr. Ravi
Tulip City , Town Ship ,Sector -
58,Gurgaon

Mr. R.D. Garg
Sr. GM, Soorya Heighcon Pvt.
Ltd, DLF Galleria,DLF City-IV,
Gurgaon.

Mr. Kuldeep Sharma
Orris City , M.C.Construction
Co.,Sector-85, Manesar,
Gurgaon.

Rajbir Goyal
Director, Antriksh Hights, Sector-
84, Manesar, Gurgaon.

Mr. Ganesh
Site Incharge, Sony Plumbing &
Fire Co. Manesar, Gurgaon.

Mr. Manoj Parihar
Facility Manager, Vipul Facility
Manegement, Kundli, Sonapat

Mr. Dalbir Dahiya
Govt Contractors & Developers
331/25A, Bhagat Singh
Colony, Lehrara Chungi, Sonapat

Mr. Virender Singh
Supervisor, Auliawalia
Construction Co.
Khanpur Medical Collge Site (
Gohana) Sonapat

Mr. Vipin Lekhi
Administrator Projects, Globle
Mall, Jalanhar by pass,
Ludhiana (Punjab)

R.S. Tewatia
Managing Director, Om Buidcom
Pvt. Ltd. 648, Faridabad

Mr. Arun Sudh
Hotal Gulmor, Ferozepur road,
Ludhiana (Punjab)

Mr. P.K. Jhaa
Project manager, H.S. Sandhu
Builders Pvt. Ltd. Glada
Flats Dghagri Ludhiana (Punjab)

Mr. Mohan Singh
Gogna Engineers, Builders &
Contractors, 3035, Gurudev
Nagar, Ludhiana (Punjab)

Mr. Aslam
Project Manager, Shri Ram
Construction, Ludhiana

Sh. Zile Singh Sheokand,
Consultant, Rural Development
Department,
Haryana, Chandigarh

Dr. S.S. Dalal, H.C.S.
Additional Deputy Commissioner
District Sonapat Haryana,

Shri Jagpal Singh Sidhu, I.A.S.
Financial Commissioner, Rural
Development & Panchayat,
Chandigarh

Shri Satwant Singh Johal, I.A.S.
Joint Development Commissioner
SAS Nagar (Mohali), Punjab

Mr. Sita Ram Gupta
Project Director, SGSY-Special
Projects
Rural Development & Panchayati
Raj Department
Govt. of Rajasthan, Jaipur

Shri R.C. Aggarwal
Project Officer, SGSY-Special
Projects
Rural Development & Panchayati
Raj Department
Govt. of Rajasthan, Jaipur

Plumbing Education & Employment

Questionnaire

- 1) Name of the Company/Organization _____

- 2) Nature of activity _____

- 3) What are your manpower requirements of Plumbers at entry level (Freshers)
 - a) In next 4-6 months _____
 - b) In next 6-12 months _____

- 4) Skills/Competency required for Plumbing Workforce _____

- 5) Salary Offered _____

- 6) Locations/Area of Operations with regard to above requirement

- 7) Will you be willing to support this training project by way of any following elements?
 - Material
 - Specialized Training
 - On Job Training

- 8) If yes please give details _____

- 9) Name, Tel No & Email id of Contact Person (Kindly attach business card)
