

DISTRICT EXPORT HUB HYDERABAD DISTRICT ACTION PLAN

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CHAPTER - 1 DISTRICT AS AN EXPORT HUB – A VISION

The call of the Honourable Prime Minister of India, articulated in his speech on the eve of Independence Day, 2019, to transform every district into an export hub, has become the guiding light for economic policy across the country. Central to this vision is the idea that every region in India has traditional products and technologies which can be harnessed and promoted to create export hubs.

The Indian economy has grown tremendously over the last decade to occupy the position of the fifth largest economy in the world, with a share of close to 8 percent in the global Gross Domestic Product. However, its share in the world exports is disproportionately low at less than 2 percent. This can be explained to some extent by the size and diversity of the domestic market which has the capacity to consume most of the domestic production. This means that businesses are not incentivized to diversify in the export market in the natural course of growth. Rather export is seen as a specialized activity pursued by few big business houses.

Another factor is the predominance of the MSME sector in India. These MSMEs often lack either the knowledge or the risk appetite to venture into the international market. However, the importance of trade as a pillar of economic growth cannot be overstated. As the trends of economic globalization only appear to intensify, it is imperative that the local economies are seamlessly integrated into the global marketplace, thereby increasing the scope and sustainability of growth.

Planning for export growth in India has historically been a centralized process. This new approach not only decentralizes the planning process, but also puts at its centre the most valuable stakeholders, i.e. the local producers and manufacturers. Exports are emphasized not just to reduce trade deficit but as a mechanism for creating boosting rural economic growth too, making local products more attractive for consumers across the world and supporting employment generation through empowering of the MSME sector. For this purpose, the district is the ideal administrative level to integrate the rural economy with the industrial economy and to create a green channel for the MSME sector to access international markets.

However, as the global socio-economic and geo-political environment undergoes rapid changes after Corona pandemic, a proactive plan of action is necessary to ensure that the district is enabled to participate in and benefit from the fourth industrial revolution, i.e. Industry 4.0. This revolution is predicted to bring about transformations not only in lifestyles and consumer choices but will also change the very nature of production.

Policy Vision

This initiative is intended as the next step in competitive and cooperative federalism, taking trade planning to the district level so that an inclusive, participative, ground root approach can be adopted. This vision then is:

“ to transform every district into an export powerhouse, competitive with and integrated into the technologically advanced global market, through a participative approach which emphasizes and values the ‘local’, connects the rural and urban economies seamlessly and produces sustainable and equitable economic development”.

Mission

The mission of this plan is to synergize the efforts of the centre and the state government and to create institutional mechanisms to promote trade. This institutional structure will be set up at the district and will act as both the creator and the implementer of sustainable district level export promotion strategies.

The institutional mechanisms will focus on translating the demands of modernization into scalable solutions for MSMEs as well as industry leaders to enter and succeed in the field of export. These solutions will aim to increase the competitiveness of domestic industry, boost exports through both an increase in volume and through value addition, create sustainable employment- generating economic growth and lead to rapid socio-economic development.

Objectives

The objectives of the Export Plan are:

- To enhance the volume of exports from each district.
- To create a flexible and permanent institutional mechanism with participation from all stakeholders to act as a facilitator and guidance system for export incentivization.
- To identify lead products and sectors for targeted and continued interventions for export promotion
- To synergize various schemes at the centre, state and district level which address industry, agriculture and exports
- To provide support both domestically and internationally to local industry from the production stage to the exporting stage.
- To increase efficiency in the supply chains and augment export infrastructure
- To augment both supply and demand through product and market diversification.

Strategy

The choice of strategy is determined by the opportunities offered by decentralised local level planning as well as the constraints presented by the lack of official district level data on exports. Therefore, the approach adopted includes broad-based consultations with district administration, district industries centre, local industry including exporters, Export Promotion councils, industry associations, lead banks, inspection and control authorities etc. The information gathered from these consultations is intended to augment the limited official data through qualitative first hand testimony regarding the condition of export in the district.

An assessment of the current situation will help in the creation of an economic profile and an export profile of the district. This is used to identify the lead export products and sectors in the district as well as the major challenges and opportunities for the export community and the MSMEs. Based on the product and the problems indicated by the industry, specific solutions are designed for implementation at the district level as well as to be recommended to the state and central government.

This exercise is not intended to be a one-time activity. The District Export Promotion Committee will seek to set up a mechanism to provide continuous facilitation to the industry in dealings with the complexities and concerns in the export procedures. These committees will be composed in a manner which can best serve all the needs of the industry and trade in the district.

The strategy for export promotion will not be limited to measures related to export only but will comprehensively address all aspects having direct and indirect impact from farm to fork and factory to consumer. A study of the entire value chain, particularly in the lead sectors and products is critical for this purpose. From such a study agenda points will be formulated to improve infrastructure, financing facilities, marketing and so on.

A policy with all good intentions may not yield any results without effective implementation. Mechanisms for implementing, reviewing and reporting on the policy will be also being outlined within this document. Such reviewing is intended to enable course correction based on the feedback received from the various stakeholders. Expected outcomes and timelines will be clearly outlined along with nodal agencies responsible for specific measures against which the efficacy of the policy can be assessed.

In addition to the lead sectors, certain sunrise sectors, both in goods and services will be identified to create a favorable ecosystem so that the economies of the district as well as the state continue to be competitive, sustainable and dynamic.

The policy will also consider the best way to technology to benefit exporters in the district. Digitization of processes to facilitate faster and simpler procedures will be encouraged.

CHAPTER - 2 DISTRICT LEVEL EXPORT PROMOTION COMMITTEE (DEPC):

To execute the vision of Honourable Prime Minister, Telangana state Government constituted District level Export Promotion Committee (DLEPC) vide G.O. Ms. No. 22 dated 25.11.2020.

Serial No.	Official/Department	Role
1	Collector/DM/DC/District Development Office/CDO	Chairperson
2	Designated DGFT RA	Co-Chair
3	GM District Industries Center (DIC)	Convener
4	Nominated member from the state Government (Commerce & Industries Department)	Member
5	Lead Bank Manager	Member
6	Representative –Department of MSME, Govt. of India	Member
7	Representative Sector Specific Export Promotion Council	Member
8	Representative – Quality & Standards Implementation body	Member
9	Representative from District Trade/Commerce Associations	Member
10	Sector Specific Ministry in Government of India (Agriculture, Fisheries, plantation boards etc.)	Member
11	Sector Specific Ministry of the State Government	Member
12	Sectoral Agencies specific to Product identified in each District (NABARD etc.)	Member
13	Other State Government Representative (As per requirement)	Member

S.No	Terms of Reference
1	Benchmarking baseline export performance of District Present Export Performance
2	Identification of potential export products from the District
3	Creation of District export action plan with quantifiable targets
4	Creation of sub-groups for each identified potential export product involving stakeholders like manufactures, artisans, exporters of the identified products
5	Resolution, escalation and monitoring of issues in exports from the District for identified potential products through regular meetings
6	Identification of bottlenecks for exports of potential products
7	Identifying training and development needs of District industries and co-ordination for training with other departments;
8	Dissemination of information through trainings, seminars, guest lectures, practical training, exchange visits with other District level

9	Act as one point facilitator for export promotion at District level
10	Liaison with and report progress to state Level export promotion committee
11	Update DGFT's Online DEPC Progress Monitoring Portal

CHAPTER-3 ECONOMY AND EXPORTS OF TELANGANA

The state of Telangana came to a reality on the historic day of 2nd June 2014, with the formation of the 29th State of the Indian Republic. The Government of Telangana is of the firm view that industrialization holds the key for higher and sustainable growth leading to growth of exports. The Government of Telangana has recently unveiled an investor friendly industrial policy, which is receiving applauds from the Industrial community and being treated as the best policy in the Country.

ECONOMY:

The year 2021-22 was one of economic revival, with the state as well as the national economy rebounding, and achieving a 'V-shaped' recovery. The country's GDP at constant (2011-12) prices grew by 8.9%, while that of the state grew by 11.2% – higher than the country's by 3.6 percentage points. In 2021-22, Telangana's nominal GSDP was valued at Rs. 11.55 lakh crore, after achieving a growth rate of 19.1% over the previous year, showing strong signs of recovery from the shock of the COVID-19 pandemic.

Since state formation, the Services sector has been the highest contributor to Telangana's Gross State Value Added (GSVA), followed by the Industries and Agriculture and allied sectors. Based on the Advance Estimates of GSVA for Telangana, in 2021-22, the Services sector accounted for 61.3% of Telangana's GSVA at current prices⁸, followed by the Industrial sector (20.4%) and the Agriculture and allied sector (18.3%).

Advantage – TELANGANA

- The state has large amounts of land available as well as clusters which cater to the production variety of goods.
- Rich in natural resources like coal, limestone, Granite, bauxite and mica.
- Availability of skilled and semi-skilled manpower.
- Favourable industrial policy of state government with schemes like TS-ipass, T-pride and T-idea.
- Geographical location, cosmopolitan culture and developed infrastructure.
- Presence of many central public sector units like BHEL, MIDHANI, ECIL, HAL and BDO etc.
- Presence of central government training and educational establishments like NGRI, IICT, CCMB, Central University, NALSAR, NPA, NIRD etc., and global institutions like ISB, ICRISAT.
- Well developed pharma industry catering to 75% of exports from India
- State has robust infrastructure in IT & ITES sector and audio & visual services.

Export Performance of state:

- In 2020-21, Telangana sold Rs. 2,10,081 Crores worth of goods and services to the international markets, accounting for 21.4% of the state's nominal GSDP. A majority of these originated in the services sector, which made up 69.3% of all exports by value
- During 2020-21, Telangana exported merchandise goods worth Rs.64,539 crore. Pharmaceutical goods and Organic Chemicals constituted 65% of the total goods exported. The USA was the largest importer of goods from Telangana, importing over 26.3% of all exports by value.

Share of Different Commodities in State's Exports (2020-21)

Share in state's exports (%)

Pharmaceuticals	33.41
Organic Chemicals	31.12
Nuclear Machines	5.37
Electrical Machinery	4.67
Salt and Minerals	2.82
Cotton	1.97
Cereals	1.76
Coffee & Tea	1.74
Aerospace Structures	1.04
Tools and Metal Goods	1.03
Others	15.07

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Others	15.07	

Source: Commerce & Export Promotion Department,
Government of Telangana, 2022

- In 2014- 15, the IT exports from Telangana were worth Rs. 66,276 crore. This more than doubled to Rs. 1,45,522 crore by 2020-21. The Compound Annual Growth Rate in IT exports during this period was 14.01%. The total employment in the IT sector increased from nearly 3.7 lakhs to 6.28 lakhs during this period.
- As per the Export Preparedness Index 2020 published by NITI Aayog, Telangana ranked second among the land-locked states and sixth overall in terms of Export Preparedness.
- NITI Aayog report suggests that Telangana has the 5th best export ecosystem among all states, boasting of well-developed export infrastructure, trade support systems, and R&D infrastructure.

CHAPTER-4 HYDERABAD DISTRICT PROFILE

Hyderabad is a historic beautiful City and is the Capital of Telangana. The city is called “Pearl City” and famous for its twinkling pearls and glass embedded bangles. The present Hyderabad district came into existence in August 1978 with total geographic area of 199.6 square kilometers and covers the twin cities of Hyderabad and Secunderabad.

The strength of Hyderabad district lies in its infrastructure facilities and its invaluable Human resources. The city is a hub of industries with three main Industrial Estates of Chandulal Bardari, Sanathnagar and Azamabad. It is also being called as "Cyberabad" and has become a synonym for I.T. industry. The IT industry gave impetus to the growth of audio and visual services industry in Hyderabad.

Telangana is the gateway to south India. Hyderabad being the capital of Telangana has become a much sought after place for professionals from all over India. It has resulted in growth of healthcare industry. Indians from all over the country and foreigners visit Hyderabad to get affordable health care services.

District at a glance:

Physical Features

Geographical Area	:	199.60 Sq. Kms. It is 5th largest city in India.
Location	:	78 Degrees 47' Eastern longitude and 17 Degrees 36' Northern latitude.
Altitude	:	1778' above Mean Sea Level.
Highest Point in the City	:	2206' above MSL (Banjara Hills)
Rivers	:	Musi (Tributary of Krishna)
Terrain	:	Hard and rocky with pink and gray granite

Climate

Normal rainfall	:	786.8 mm
Rainfall during 2001-2002	:	610.0 mm

Administrative Divisions

Revenue Divisions	:	2 (Hyderabad and Secunderabad)
Mandals	:	16
Municipalities	:	2 (Municipal Corporation of Hyderabad and Quli Qutub Shah Municipal Corps).

Education (Educational Institutions)

(i) Junior Colleges	:	339
(ii) Degree Colleges	:	127
(iii) P.G.Colleges	:	12
(iv) B.Ed.Colleges	:	17

(v) Medical Colleges	:	7
(vi) Engineering Colleges	:	29
(vii) Polytechnic Institutions	:	14
(viii) Universities	:	5 (Osmania University, JNTU, A.P. Agriculture University, A.P. Open University And Hyderabad Central University)

Agriculture

(i) Geographical Area	:	199.60 Sq. Kms.
(ii) Net Sown area	:	0.6 % of Geographical Area

Important Crops

Horticulture Produce	:	Grapes, Guava, Vegetables like brinjal, Cabbage etc.
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Important economic activities

(i) Poultry Population	:	26888 (2007)
(ii) Livestock Population	:	60277

Power

No. of villages electrified	:	All 65 villages (100% electrified)
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Infrastructure:

A number of industries are located in the three Industrial Estates of Chandulal Bardari, Sanathnagar and Azamabad and abundant power supply is available for S.S.I / Tiny Units without any power cuts / power failures. Hyderabad, also being called, as "Cyberabad" has become a synonym for I.T. industry, with a number of public call offices and Internet cafes in addition to regular telephone connections. Road and Rail transport, Banks, STPH, Hitech City at Madapur, other theme parks such as Apparel Export Park, Export Promotion Park, Hardware Park, Biotech park etc in the outskirts of the city, besides various training institutes, offer ample scope for the growth and development of SSI & Tiny sector in the district.

The term 'Infrastructure' covers various services like land, power, roads, communications, water etc and social infrastructure provides for health, education, sanitation, nutrition etc.

A major portion of the available land is occupied by roads and buildings, which are used for commercial and residential activity.

Industrial Estates / I.D.As: There are three Industrial estates located in Chandulal Bhardari, Sanathnagar and Azamabad, with full occupancy rate.

Details of Large and Mega Projects:

S.No.	Name of Industry	Location of Industry	Line of Activity	Capacity with units	Investment (In Rs. Crores)	Employment (In No.s)
1	M/s. Hyderabad Industries Ltd.	Sanath Nagar IE	Mfg of AC Sheets, pipes, Mould spares, Size Separation / Deduction equipments	150650 M.T	80	300
2	M/s. The Oxygen Equipment & Engineering Co. Pvt. Ltd.	C-37, 138, I.E. Sanath Nagar	Industrial Gases	2 Lakhs Cylinders	51	71
3	M/s. Vazir Sultan Tobacco Co. Ltd.	Azamabad IA	Cigarettes	2365 Millions	996	2774
4	M/s. Biological Evans	18/3, Azamabad IA	Drugs & Pharmaceuticals	818 Ltrs	253	249
Total					1380	3394

Important Industrial Activities under Micro, Small industries:

- i. Electrical Motor Rewinding units.
- ii. Auto Repair & Servicing.
- iii. Welding & General Engineering works.
- iv. Repair & servicing of white goods and electronic products.
- v. Refrigeration and Air Cooler assembling Units.
- vi. Pump-set repair / Servicing.
- vii. Computer Training Institutes
- viii. Studded Gold Jewellery. ix. Documentary Films (Like advertising)
- x. Film Editing, Recording and Dubbing.
- xi. Water Purification Systems.
- xii. Voltage Stabilizers.
- xiii. School Bags.
- xiv. Beauty Parlours.
- xv. Bakery items manufacturing.
- xvi. Hotels and Restaurants.
- xvii. Packaging materials.
- xviii. Offset Printing.
- xix. Readymade garments.
- xx. Jam, Jelly, Chutney, Pickles. xxi. Instant Noodles. xxii. Egg Powder.

No. of units registered in Udyog Aadhar in Hyderabad District as on 06-06-2017:

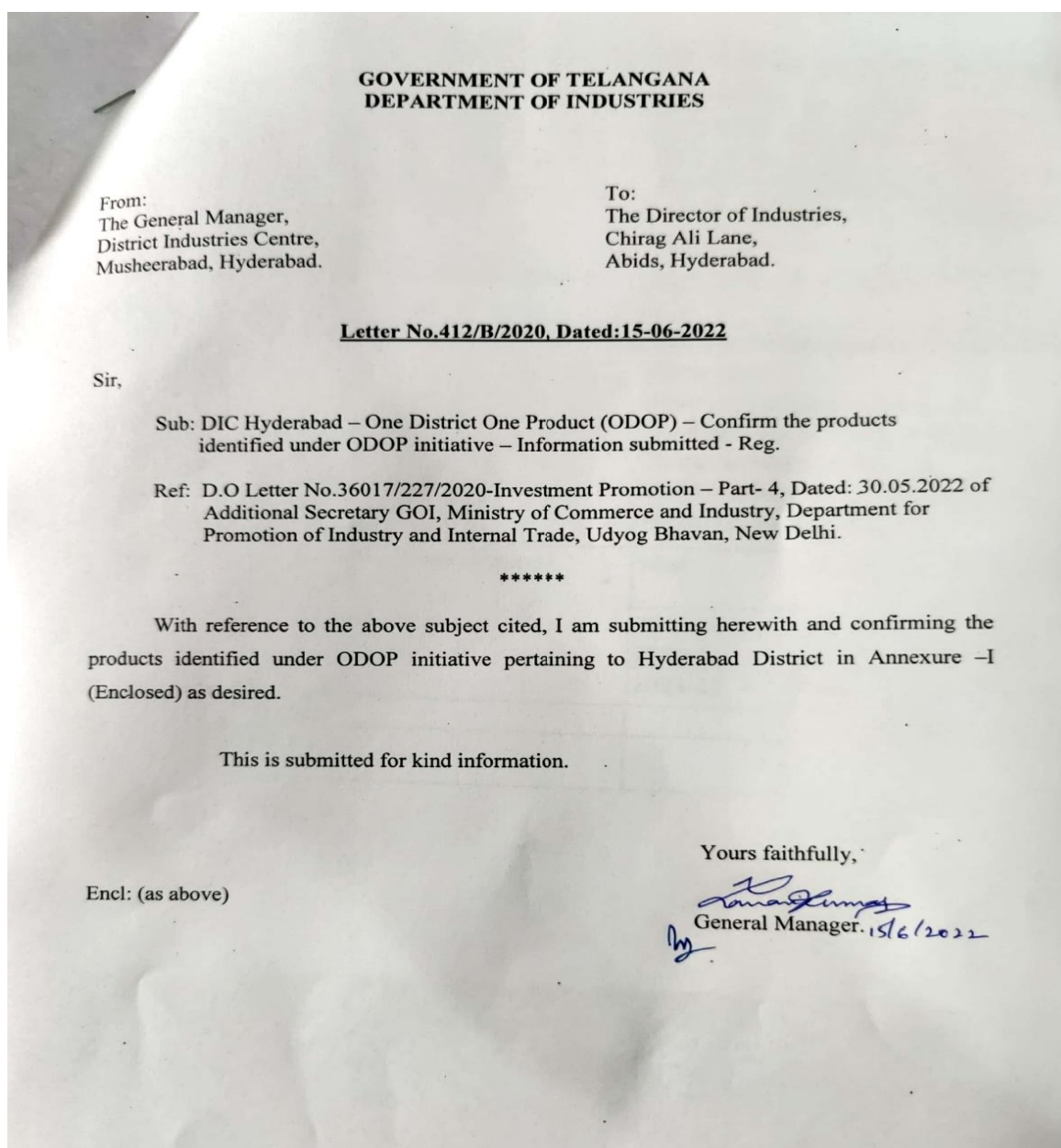
Total Units	Micro	Small	Medium
12716	7723	4815	178

CHAPTER-5 EXPORT POTENTIAL PRODUCTS OF THE DISTRICT:

1. Gems & Jewelry.

Hyderabad is a traditional home for Gems & Jewels. Hyderabad pearls and lacquer bangles made by local artisans are known all over the world. Due to increasing demand for Gems & Jewels in Hyderabad, artisans from all over the country established their factories in Hyderabad. There is also increasing export demand from gulf countries due to historical relations of Hyderabadis with Gulf people. Value-addition to these traditional products and diversification into other gems and jewellery items will provide the much needed relief to local artisans and craftsmen.

Exports from Hyderabad:



Base Line Data for ODOP for Hyderabad District (Annexure 1)				
Sr. No	Heading	Explanation		
1	State	Telangana		
2	District	Hyderabad		
3	Product	Studded Gold Jewellery		
4	Number of Units	3500 approximately (of different sizes including artisans, tiny and job work units)		
5	Number of people involved in this profession	Approximately 1,00,000		
6	Identified Associations	M/s Hyderabad Jewellery Manufacturers Association, Hyderabad Email : hjmahyd@yahoo.com President Mr. Mahender Tayal Phone no 9848057291 Vice President Mr. Mukesh Agarwal Phone no 9985171000		
7	Total Sales for last 3 years	Year	Quantity in KGs	Value in Lakh Rupees
		2019-20	19472	693109.665
		2020-21	19545	929753.553
		2021-22	29250	1859779.11
8	Source	HJMA, GJEPC and FIEO		
9	Remarks			


General Manager
15/6/2022
DIC-Hyderabad District

SWOT Analysis:

SWOT stands for Strengths, Weaknesses, Opportunities, and Threats, and so a SWOT Analysis is a technique for assessing these four aspects of our export plan

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Traditional industry: Large base of artisans are available to work in the industry. They have traditional knowledge of the sector and able to continue their business since long time.	The development of new designs is not adequate to the demands of customers. Lack of exposure to new ideas.	Skill development can be made through centre and state schemes. Centre of excellence to bring new innovations is required.	Competition from overseas players to capture market.
Availability of Capital: Most of the artisans are from close knit families and able to source their capital from family friends and other informal ways.	The capital they get is at high interest rates because of this the industry works at low margins.	Bank loans at low interest rates can be provided. Working capital requirements can be met by duty exemption schemes and Advance authorization schemes.	High inflation may cause high interest rates.
Availability of skilled and semiskilled workers: Because of its strategic location skilled and semi skilled workers are available from within the state and also from outside the state.	The skills are not compatible to develop and manufacture new designs. Low wages and high employee turnover in the industry.	Centre of learning can be established with certification courses.	Lack of awareness among youth regarding vocational courses.
Increasing demand: The economic growth for the last two decades has given rise to aspirational middle class who want gold both as ornaments and as investment.	Because of many players there is saturation in the domestic industry.	Export avenues should be explored. Overseas Exhibitions and regular buyer -seller meets shall be arranged.	Overseas trade is prone to certain risks. Lack of marketing abilities with the industry.

Supportive ecosystem: District has good infrastructure and logistics. It is a peaceful district without any major disturbances. The ecosystem is compatible for the growth of trade.	Most of the players are small scale and family owned businesses. They are not able to expand further and bring economies of scale.	Increasing awareness of players regarding various incentives offered by Central and state governments and various opportunities in the sector to expand and grow. Providing entrepreneurship training to small scale players.	Ever changing geopolitical environment and policy uncertainty.

ISSUES, PROBLEMS AND RECOMMENDATIONS:

Consultation and discussion with various stakeholders have been regularly done by District Administration as well as Regional Authority of DGFT. Through various meetings following are observed by the authorities about problems and issues faced by the exporters of the District.

Sl.No	Issue/Problem	Recommendation
1	Lack of administrative support: Lack of awareness about IEC and other central and state government incentive schemes. Lack of market information for small scale players. The players are not able to understand new trends and developments in the global market.	Regular awareness meetings should be conducted for industry players to know the various government schemes. Buyer seller meets at regular interval s shall be organized to know new trends in the market.
2	Lack of branding facilities: Lack of branding facilities, Quality control and assurance and certification measures and packaging facilities: Quality control measures, certification measures and good packaging facilities will enhance customer satisfaction and thus increasing demand for industry. These measures will also enhance value addition of the product and increase revenues to the players. These measures will have a long term impact on industry and promote its brand value in the international market.	Branding facilities on cluster basis to industry players at affordable cost shall be established. Quality certification agencies shall establish their centers in these clusters. Industry players shall be incentivized to go for branding and quality certifications. Logistics centers shall be established at the clusters o facilitate attractive packaging at affordable cost. Industry players incentivized to take foreign certifications which are accepted globally.

3.	Lacking of credit support: Lack of credit support and working capital. The industry works on order basis and most of the players are small scale players. Because of uncertainty in business they are not able to get capital from banks. The main source of funds for the industry is from informal sources. The capital they get is at high interest rates and because of this the industry works at low margins.	Banks shall be asked to provide credit at low interest rates. Lead bank for a cluster shall be established to get required business for the bank and to meet special needs of industry players. Since overseas trade is prone to many risks, some part of risk premium shall be borne by central/state government so that the working capital needs can be met by exporters. Exporters shall make use of Advance authorization and duty draw back schemes to meet their working capital needs.
4.	Lack of skilled artisans and Lack of awareness on new trends: Lack of skilled manpower. Design sensitization training is required. Lack of midterm and long term strategic plan to address manpower needs.	To meet the regular needs of skilled man power a skill development centre shall be established. It should offer various certificate based courses in various industry related activities to meet industry needs. It should be based on global standards.
5.	Lack of Research and development : Lack of R & D activities to develop new designs and invent cost effective methods	A centre of excellence shall be established to conduct R&D activities to develop new designs and to develop cost effective methods in designing and making.
6.	Logistics cost is high: Since the customs clearance is only at airport the travel time as well as cost is high. Small value exports need support from department of post as there are no foreign dispatches through DOP from Hyderabad.	There is a need for establishing custom clearance at a central location near to industry so that the transport time and cost can be reduced. Department of Posts shall be asked to start foreign dispatches from Hyderabad.
7.	Lack of marketing support: Need to access overseas markets.	The industry players shall be incentivized to participate in overseas market fairs and exhibitions to demonstrate their products. They should be provided entrepreneurship training to expand their businesses.
8.	Lack of common processing facilities and facilitation centre	The industry should adopt cluster based location model to use common processing facilities to be established. It will reduce working capital needs.

2. Audio & Visual services(Animation, Visual effects, Gaming and Comics)

The Animation, Visual Effects, Gaming and Comic (AVGC) sector in India has the Potential to become the torch bearer of “Create in India” & “Brand India

Scope of AVCG in India:

- The gaming industry in India reached Rs 62 billion (US\$ 890 million) in FY19 from Rs 24 billion (US\$ 343.40 million) in FY18 and is expected to reach US\$ 3.58 billion by 2024
- The animation and VFX industry in India reached Rs 87.7 billion (US\$ 1.25 billion) in FY19. It is expected to grow at a CAGR of 16 percent till FY24 and reach Rs 184 billion (US\$ 2.63 billion).
- The industry has the potential to generate more than 1Lakh Job opportunities

Advantage AVCG sector in Hyderabad, Telangana:

- Reasonable cost & abundant human resources across Hyderabad and surrounding districts.
- Telangana AVCG is the pioneer in Animation and VFX with IPs like Chota bheem, Bahubli, and a series of blockbuster VFX movies and Animated series.
- Presence of industry veterans and mentors to support the startup ecosystem.
- Existence of AVGC industry in the State: International players like Walt Disney, Sony Entertainment, Microsoft, Electronic Arts, etc. and domestic players like Tata Elxsi, Purple Talk, Prime Focus, Rythm & Hues, Prasad EFX, DQ entertainment, Rotomaker, 7Seas Entertainment, Green Gold, Makuta, Fire Fly, etc. are present in the State.
- Low cost of living & transportation and world-class social amenities
- Proven experience and record of international standard technology
- The major opportunity in International Animation, VFX, and Gaming services exports.
- Experience in multi-platform development and design
- Strong Govt support to promote entrepreneurs in the sector with programmes like T-hub.

ISSUES, PROBLEMS AND RECOMMENDATIONS:

Consultation and discussion with various stakeholders have been regularly done by District Administration as well as Regional Authority of DGFT. Through various meetings following are observed by the authorities about problems and issues faced by the exporters of the District.

Sl.No.	Issue/Problem	Recommendation
1	Lack of awareness in student communities and parents that the AVCG industry is one of the rewarding and mainstream career opportunities.	Initiating mechanism for creating continuous awareness campaigns all across the state from the school level to colleges and universities.
2.	Lack of industry-ready skilled workforce coming out of educational institutions to meet the dynamic industry demands. Lack of updated curriculum and supporting infrastructure in most of the colleges and institutions	Need for vocational courses in the AVCG sector. The curriculum should be designed in collaboration with industry. The colleges/institutes should be incentivized to offer these courses. Institutes shall be supported in setting up computer labs and Software and other related infrastructure.
3.	Lack of Mentorship: Lack of mentorship, Technical and International Networking support for startups to set up and grow their services export business.	Govt shall tie up with software and hardware developers of AVCG to provide subsidies for qualified startups to enable the ease of business setup. Bringing in large anchor companies to set up shops in Telangana, talent would be groomed and more companies would come out of it.
4.	Lack of Creative, Marketing and financial support for Animation and Game IP creating startups.	A centre of excellence consisting of SMEs of AVCG who will constantly monitor opportunities and updates in the industry and provide training/Share knowledge on the same to the key stakeholders of the industry i.e Educational institutions and companies. Plays a key role in curriculum development. The centre also provides marketing support.

3. Healthcare Services.

The health care system in Hyderabad, India consists of 50 govt. hospitals with bed capacity of 5749 and around 200 private hospitals, 6000 clinics and nursing homes and 800 diagnostic centers total providing up to 17000 bed space in general.

Hyderabad finds itself in a unique position of having witnessed a massive growth in medical infrastructure making quality healthcare accessible to patients both in the private and public healthcare sector.

Within a few years of the State's formation, Hyderabad quickly emerged as the country's healthcare capital and has provided an alternative choice for medical tourism, which usually is a yardstick to measure the quality of healthcare services, when compared to metro cities like New Delhi and Mumbai.

Estimates suggest that way back in 2009-10, the projected revenue from medical tourism was close to Rs 3 Crores in Hyderabad which now hovers between Rs 15 crore and Rs 18 Crore yearly. While the last year has been dominated by the Covid pandemic, the fact remains that top private healthcare institutions in Hyderabad attract a lot of patients from neighboring States like Odisha, Chhattisgarh, West Bengal, Maharashtra, and Karnataka apart from patients from Africa and South East Asia.

To further cement their position, the corporate hospitals and laboratories in Hyderabad went ahead and upgraded their facilities to acquire certification from the National Accreditation Board for Hospitals and Healthcare Providers (NABH) and National Accreditation Board for Testing and Calibration of Laboratories (NABL). Eventually, the NABL certification to private laboratories in Hyderabad came in handy, as the certification became mandatory to be eligible to conduct RT-PCR tests for Covid-19 diagnosis.

State government's efforts to push medical device manufacturing by setting up the country's largest medical devices park at Sultanpur has cemented Hyderabad's place as the best urban centre that offers the overall ecosystem for the healthcare industry

Recommendations.

1. **Infrastructure support:** As the inflow of patients from abroad is increasing the hospitals have to expand their facilities like Testing centres, Pharmacies and ambulance services blood banks.
2. **Dedicated help desk for medical tourism:** As the patients from west Asian countries and from African countries and European countries are coming to Hyderabad for affordable and high quality treatment, they have to be guided properly to avoid any discomfort to them.
3. **Nursing and physiotherapy colleges:** There is a need for establishing more nursing and physiotherapy colleges to meet the needs of increasing flow of patients. A separate nursing university will be very useful to train health care providers and develop new ways of caring to suit emerging medical needs.

4. **Medical Devices Park:** Private players shall be incentivized to establish their units in medical devices park.
5. **Awareness campaign:** Every year thousands of people are dying due to communicable, non communicable and lifestyle diseases. We can prevent these deaths by creating awareness campaigns.
6. **Supply chain strengthening:** Collaboration between private and public health systems to ensure effective delivery of healthcare services to people.
7. **Research and development:** Incentivizing Public and private health care institutions and pharma industries to undertake R&D activities.
8. **Tele-medicine services:** Private and public hospitals shall be incentivized to undertake tele-medicine services to patients in abroad and in rural and remote areas.