

カルナタカ州における 工業団地開発プロジェクトの現状

2014/4/16
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ビジネス環境整備に向けた課題と協力

1. インドにおける「ビジネス環境整備」とは？

- ・競争環境の厳しさ(コスト減圧力、高金利、為替)。本業だけでも相当な困難を伴う
- ・その上、本業を始める前に直面する困難が多すぎる(行政手続、土地関連等)

「ビジネス環境整備」とは、インドに投資する企業が本業に集中でき、それ以外の準備は全て簡単に処理できる、「プラグイン」の環境の整備。(州毎の競争)

2. カルナタカにおけるビジネス環境整備の課題

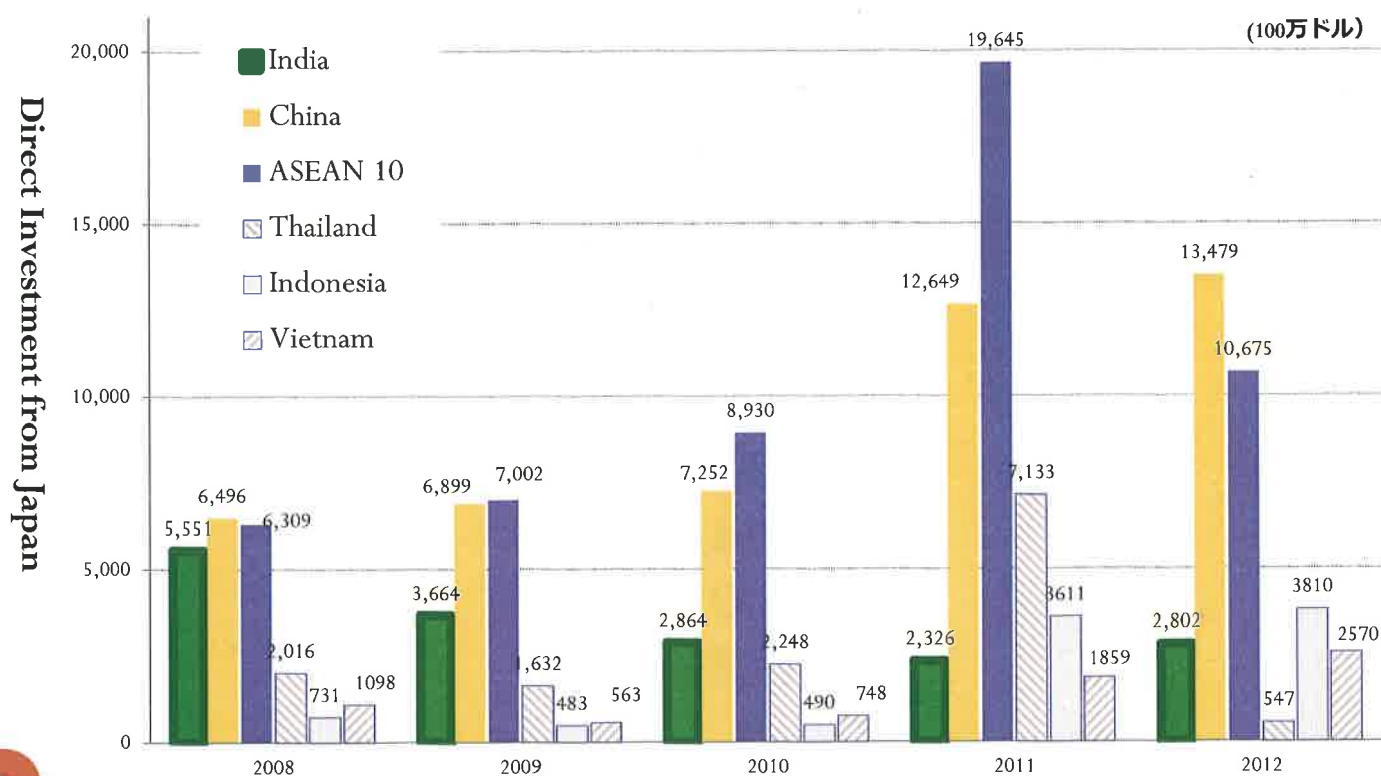
(1) インフラ整備

- ・区画整理、電力/水等の基礎インフラ整備が、分譲段階で万全に整備されている工業団地開発(→企業がすぐに工場建設にとりかけられる状態)
- ・既存の工業団地や各工場に対する、安定的な電力・水供給の確保
- ・STRR (Satellite Town Ring Road) の推進(工業団地間の幹線道路整備。特にNH207、SH36の拡幅)

(2) 行政手続円滑化(手続き透明性確保、標準処理期間の設定等)

(3) 人材育成支援 (優秀な技術工の育成)

Sluggish Growth of Direct Investment towards India



Reference: Balance of Payments (Ministry of Finance Japan), Foreign Exchange Quote (Bank of Japan)

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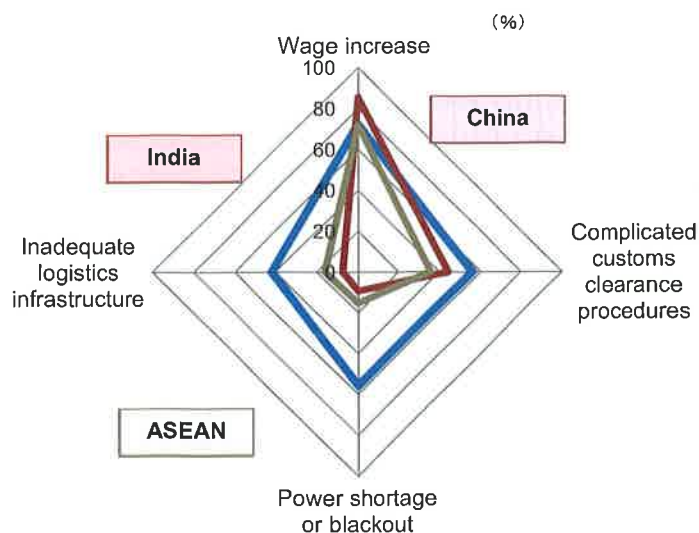
Problems of investment climate in India

◆ Compare to China and ASEAN, complicated administrative procedures and insufficient infrastructure are essential issues

【Problems for management by Japanese-Affiliated Firms in Asia】

~JETRO Survey of Japanese-Affiliated Firms in 2013~

(%)



Challenges	India	China	ASEAN
Wage increase	72.2	85.3	72.0
Complicated administrative procedures	55.9	44.3	35.8
Power shortage or blackout	55.7	9.3	15.2
Inadequate logistics infrastructure	41.6	7.4	15.9

ビジネス環境整備に向けた課題と協力

3. 日本政府との協力による環境整備ツールの紹介

(1) 世界標準の工業団地開発プロジェクト（経産省事業）

- ・ASEAN等に立地している工業団地と遜色のない工業団地造成を支援
- ・特定地域を指定して、モデル工業団地を造成する支援を行う。
- ・必要なインフラ整備は、(2)のプログラムローンを活用しつつ行うことも視野に入れる。
- ・モデルプロジェクトを通じて、土地収用問題等、ソフト面での問題解決を目指す

(2) プログラムローン (Investment promotion program)

- ・州政府と政策目標を合意し、その達成度合いに応じて、円借款を供与するJICAのスキーム（タミルナドゥ州では3年間で130億円を供与予定）
- ・本スキームを活用し、カルナタカ州において改善すべき個別課題（インフラ整備、行政手続円滑化など）を、政策目標として取り上げ、ローン供与の条件にすることにより、課題解決を図るよう、州政府に要請。

(3) CBICマスタープラン

- ・日本企業が抱えるインフラ等の問題点をCBICマスタープランで強調するよう、州政府に要請。
- ・優先プロジェクトを着実に推進するよう、州政府に要請（ペリフェラルロード、STRR）

Amata Nakorn IE (Thailand)

Amata Nakorn's Utility equipment



Amata Nakorn's main road



Amata Nakorn Industrial Estate operated by
AMATA and ITOCHU

Around 600 companies (60% Japanese)

Total land area 3020ha (appx 7460 acre)

Starting operation: 1988yr (50ha: appx 123 acre)

Job creation 140,000 employees

Total asset 182 billion Thai baht (appx 345billion rupee)

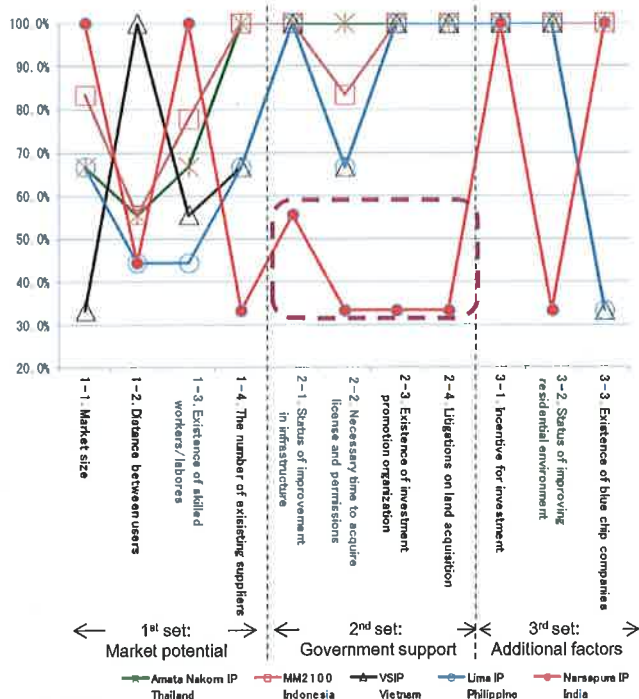


工業団地開発調査(経済産業省委託事業:NRI受託) ～まとめと今後の予定～

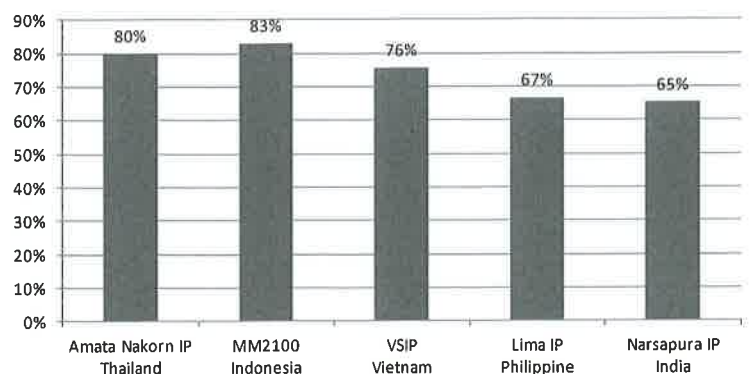
Attractiveness evaluation of industrial parks in Karnataka and ASEAN

The main reason for the low evaluation of Narasapur IP is the low score pertaining to government support (criteria set 2)

Respective attractiveness evaluation



Comprehensive attractiveness evaluation (weighted mean of the respective attractiveness)



[Reference]

Method for attractiveness evaluation of industrial parks

■ NRI survey reveal that Japanese developers rely on three main sets of criteria when selecting potential regions for industrial park development. Factors for evaluating site attractiveness were established in line with these criterions.

- The most important set of criteria consists of aspects that are greatly affected by the location of the potential site and minimally affected by government policy. Developers place great importance on these criteria as they correspond to factors that industrial park tenants give top priority to.
- The second most important set of criteria consists of aspects that the government can improve to enhance site attractiveness.
- Individual factors for evaluating site attractiveness were then weighted based on the above findings.

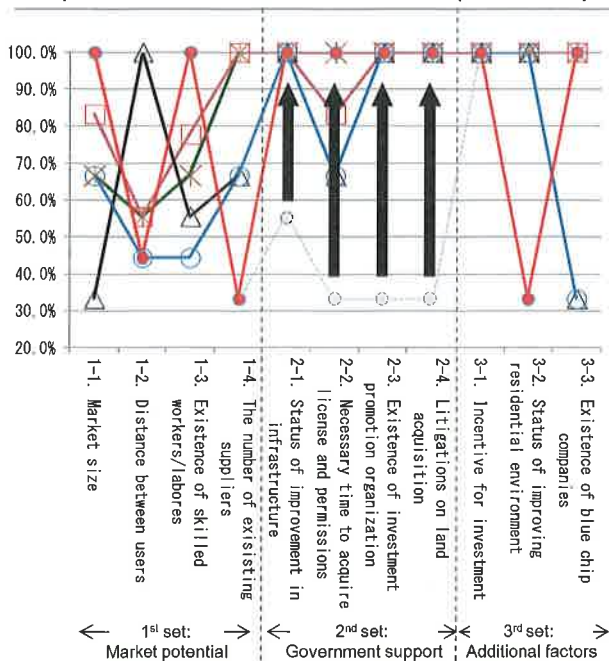
Japanese developers' selection criteria for industrial park development

1 st set: Market potential	2 nd set: Government support	3 rd set: Additional factors
1-1. Market size 1-2. Distance from customers 1-3. Existence of skilled workers/laborers 1-4. Number of existing suppliers	2-1. Extent of infrastructure development 2-2. Time required to obtain permits and licenses 2-3. Existence of investment promotion organization 2-4. Risk of land acquisition related litigations	3-1. Investment incentives 3-2. Extent and quality of housing development 3-3. Existence of blue chip companies

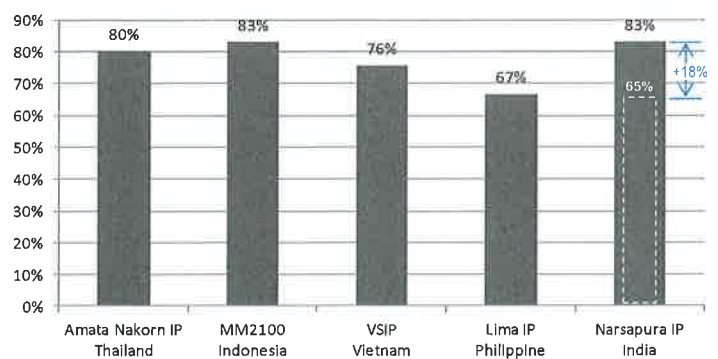
Attractiveness evaluation of industrial parks in Karnataka and ASEAN

If issues related to “government support” (Criteria Set 2) are resolved, Karnataka’s attractiveness will increase to a level comparable to that of ASEAN’s top industrial parks

Respective attractiveness evaluation (simulation)



Comprehensive attractiveness evaluation (simulation) (weighted mean of the respective attractiveness)



- 2-1. Status of improvement in infrastructure
 2-1-1/2-1-2/2-1-3. Connectivity of electric & waterworks/sewage system infrastructure between IP and peripheral utility are improved.
 2-2. Necessary time to acquire license and permissions
 2-2-1. Doing Business "Registering Property time" is shortened to 50% of current (44 days).
 2-2-2. Level of sufficiency: One-stop service office functions is improved
 2-3. Existence of investment promotion organization
 2-3-1. IP-run organizations to attract investment is enhanced
 2-4. Litigations on land acquisition
 2-4-1. Government creates a framework to shield IP developers from future law suits related to land acquisition.

India's environment for industrial park development will be improved to a level comparable to that of ASEAN

Karnatakan government actions recommended(desired by Japanese interested parties)

Infrastructure development	<ul style="list-style-type: none"> • Complete "out-of-fence" infrastructure before tenants move into the park • Develop ASEAN-level infrastructure for motor transportation and power, water and gas supply
Permit process simplification	<ul style="list-style-type: none"> • Establish a One Stop Window (integrate offices) • Ensure the effectiveness of the One Stop Window (monitor and guarantee performance) • Give sufficient authority to the One Stop Window (coordinate with relevant ministries and agencies)
Land acquisition	<ul style="list-style-type: none"> • Provide land with no litigation risks • Take responsibility in the event of disputes and guarantee compensation for losses incurred

Requests from Japanese developers

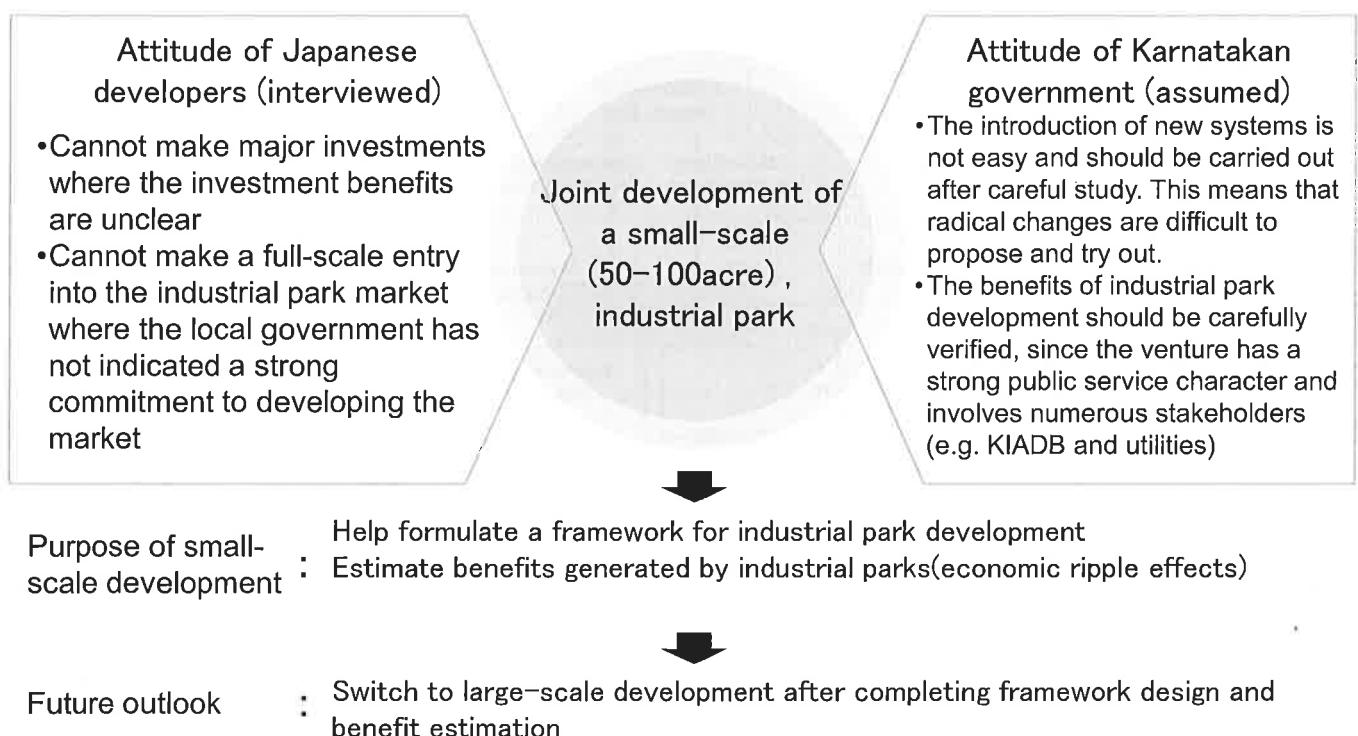
Requests from Japanese developers concerning improvement of environment for developing and operating industrial parks in Karnataka

Infrastructure development	<ul style="list-style-type: none"> ■ The Karnatakan government and utility companies should cover the construction costs for out-of-fence infrastructure (roads and utilities including connections) and should promise to complete the construction before the start of park operation.
Permit acquisition	<ul style="list-style-type: none"> ■ Offices for issuing permits and licenses should be integrated (establish a one stop window). ■ The standard time frame for acquiring permits should be clearly set forth, and measures should be taken to ensure punctuality. ■ The one stop window should be under the direct control of the Chief Minister. Matters concerning its operation should be discussed and coordinated among relevant government agencies.
Land acquisition	<ul style="list-style-type: none"> ■ When the Karnatakan government transfers/sells land to a developer, its boundaries should be properly demarcated and all the land titles should be clear. ■ The Karnatakan government should provide land that does not require very much costs for clearing and leveling. ■ Payment for land purchased should be required only after the above requirements been satisfied. ■ In the event of a dispute with a neighboring landowner or leaseholder concerning expropriated land, the Karnatakan government should bear the primary responsibility. ■ In the event that of a suspension in the development activity or operation of an industrial park caused by a dispute with a neighboring landowner or leaseholder, the Karnatakan government should take the following actions: <ul style="list-style-type: none"> • (1) Negotiate with the land owner/leaseholder to resolve the dispute • (2) Compensate for losses incurred in the development/operation of the industrial park • (3) Be liable for any litigation expenses and damages that must be paid • (4) If the park must be relocated, provide an alternative site and cover the costs for relocation ■ The above-mentioned terms should be state expressly in the relevant contract ■ The Karnatakan government should ensure that information concerning industrial park land is managed in a unified manner and that there are no discrepancies in statements made by various government personnel.

Direction to the future

(Direction to the future)

**Why don't we develop a small-scale industrial park (50-100acre) as a first step?
Utilizing this experience, we will be able to design a framework of Japanese industrial park development .**

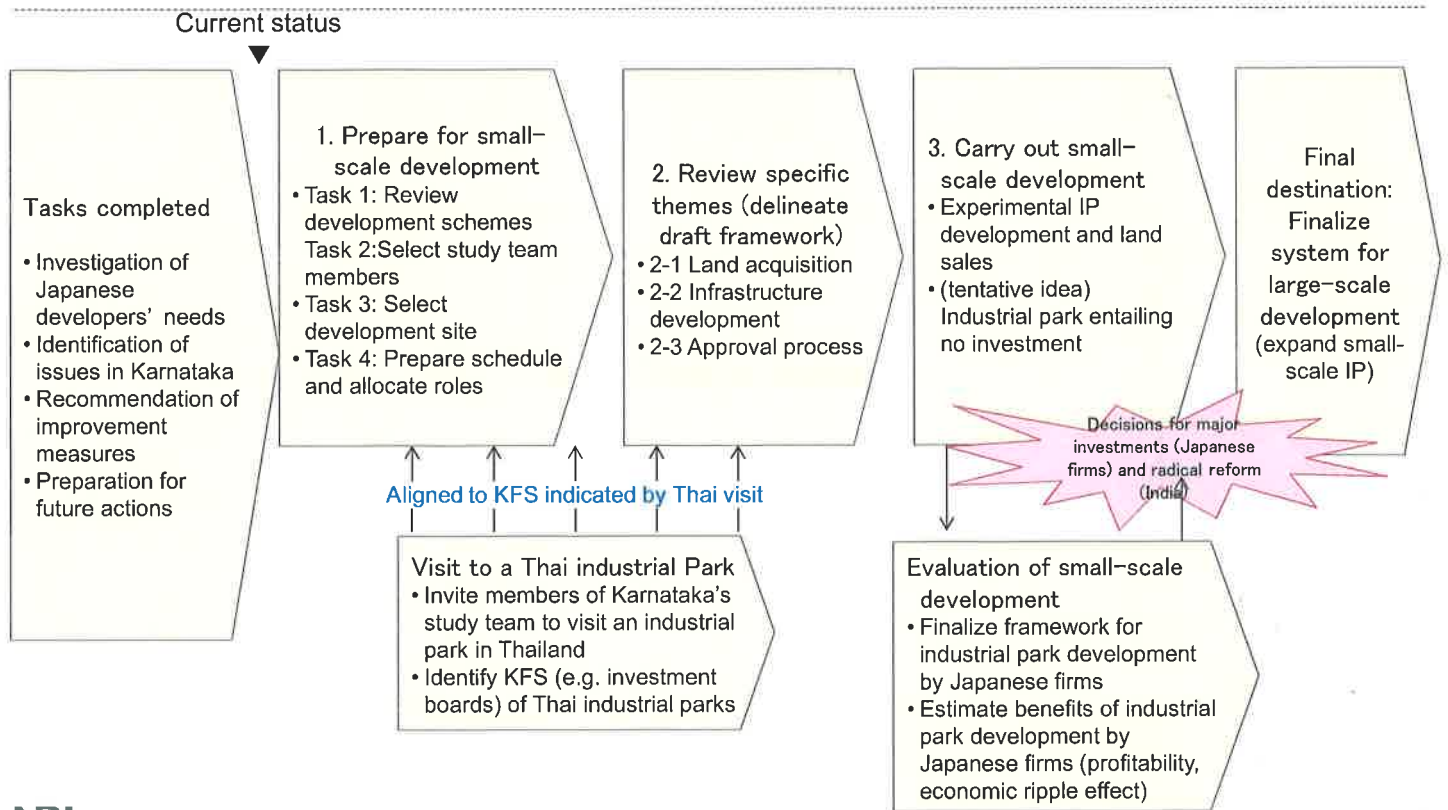


(Direction to the future)

Tasks envisioned (What we should discuss in the future)

Our final destination is developing a large-scale industrial park in Karnataka.

It is necessary for us to gain a successful experience and to generate a framework through a development of a small-scale industrial park.

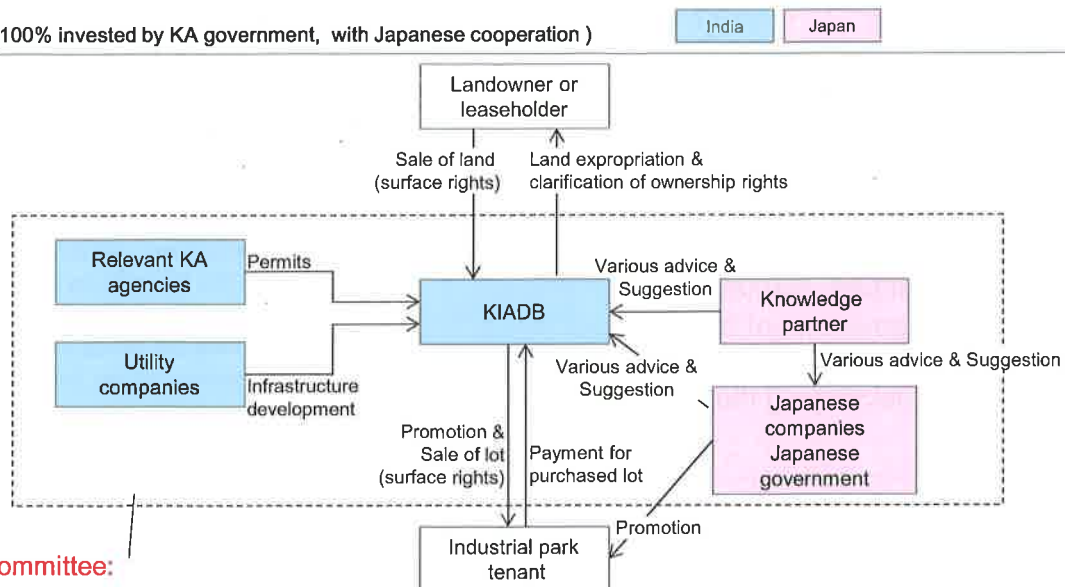


(Direction to the future)

Images of tasks (What we should discuss in the future): Task 1: Review development schemes

In Scheme 1; both Japan and Karnataka sides jointly generate a basic plan; Karnataka side undertakes development; mainly Japanese side promotes new industrial park to potential tenants.

Scheme 1 (100% invested by KA government, with Japanese cooperation)



Study committee:

Planning (development scale and concept, master plan, type of companies to solicit, sales prices, etc.) is carried out by both the Japan and India sides together