



GOVERNMENT OF HARYANA

**DRAFT LOGISTICS, WAREHOUSING  
& RETAIL POLICY - 2023**

DRAFT

DEPARTMENT OF INDUSTRIES & COMMERCE

GOVERNMENT OF HARYANA



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**List of Abbreviations**

AKIC	Amritsar-Kolkata Industrial Corridor
CAGR	Compound Annual Growth Rate
DFC	Dedicated Freight Corridor
DMIC	Delhi-Mumbai Industrial Corridor
EPP	Enterprise Promotion Policy
FAR/FSI	Floor Area Ratio/Floor Space Index
FDI	Foreign Direct Investment
FMCG	Fast moving Consumer Goods
GDP	Gross Domestic Product
GST	Goods and Services Tax
HEPB	Haryana Enterprise Promotion Board
HEPC	Haryana Enterprise Promotion Centre
ICD	Inland Container Depots
IMMLP	Integrated Multi Modal Logistics Park
MMLP	Multi Modal Logistics Park
MRO	Maintenance, Repair and Overhaul
NBC	National Building Code
PPP	Public Private Partnership
RFID	Radio-frequency identification
SDC	Skill Development Centre
TEU	Twenty Foot Equivalent Unit
PIC	Policy Implementation Committee
CLAP	Comprehensive Logistics Action Plan
LEADS	Logistics Ease Across Different States



## 1. PREAMBLE

### 1.1. Introduction

The Logistics and Warehousing industry in India is continuously thriving, valued at INR 1201.3 billion in 2021 and experiencing an upward growth trajectory at CAGR of 9-10% by 2025. Continuing the high growth trajectory, the industry is expected to attain an industry size valued at INR 1601.46 billion by 2025. As per the World Bank's **Logistics Performance Index 2023**, India's ranking has significantly improved, shot up by 6 places to 38<sup>th</sup> position. Going forward, with the emergence of evolving technologies, demand sophistication as well as advanced business models, the logistics industry is well positioned to grow stronger.

In India, the Logistics sector primarily freight transportation, comprises of road (about 64% of total freight traffic), rail, coastal shipping (about 27% and 75% share, respectively) and inland waterways transportation, pipeline, and air (constituting about 4% share each). The Logistics and Warehousing industry in the country is largely concentrated in Bengaluru (39%) and Chennai (13%). With a consumer base having a high propensity to consume, strong connectivity owing to an exhaustive network of national highways and industrial corridors, and especially after the introduction of the GST regime in India, Haryana is all set to become the logistics hub of North India in the coming years.

The Haryana Logistics and Warehousing Policy 2023 has been designed to leverage the state's strategic location, well-connected road, rail, and air network, and abundant availability of land to become a logistics hub for North India. The policy focuses on creating a robust logistics infrastructure that includes the development of logistics parks, warehousing facilities, multimodal transport hubs, Exim logistics and last-mile connectivity.

The PM GatiShakti National Master Plan aims to increase logistics efficiency by blending existing and proposed infrastructure development initiatives and network planning of various Government agencies, while the National Logistics Policy focuses on a comprehensive agenda for development of the entire logistics ecosystem. With this background, Haryana logistics, warehousing & retail policy - 2023 aims to establish Haryana as a national logistics hub, develop a state-of-the-art logistics and warehousing ecosystem in the State in accordance with the goals of the PM GatiShakti National Master Plan and the National Logistics Policy.

In LEADS 2022 Report, Haryana emerged as the 'Achiever State' and the State has consistently maintained its performance in the logistics infrastructure. From 6<sup>th</sup> rank in 2019, the State improved its ranking to 2<sup>nd</sup> position in 2021. The State secured the highest score for several indicators e.g., Quality of Warehousing Infrastructure, Timeliness of Cargo Delivery during Transportation, Operating and Regulatory Environment, and Efficiency of Regulatory Services.

In 2022 Export Preparedness Index (EPI) ranking, Haryana retained its position of 1st among the landlocked States and overall 5th in the country, and the score of the State saw a significant rise to 63.65 from 53.20. Haryana State performed exceptionally well in Policy Pillar and export performance pillar of this index.

The Retail sector in India has emerged as one of the most dynamic and fast-paced segments of the economy. The sector today accounts for over 10 per cent of the country's Gross Domestic Product (GDP) and around 8 per cent of total employment. With a population of over 1.41 billion, India is currently one of the biggest markets for national and international retail players. With recent relaxations of norms such as permitting 100% FDI in single-brand retail, 100% FDI in multi-brand processed food retail (provided such products



are produced in India), 100% FDI for online marketplaces and 51% FDI in multi-brand retail, the overall Retail market in India is expected to register growth at 9 per cent per annum going forward.

Haryana with its large consumer base, increasing per capita income and rapid urbanization has enormous potential to become one of the leading destinations for Retail trade in the country. Further, due to robust connectivity, easy access to 2 international airports at Chandigarh and New Delhi and proximity to 2 major industrial corridors i.e. DMIC & AKIC, place Haryana at a locational advantage. In addition, 14 districts of State are part of the National Capital Region, which is one of the most prominent trade and consumption hubs in India. Taking a lead in providing a conducive ecosystem for investors, Haryana has simplified the regulatory environment and further easing the approval process for the investors.

## 1.2. Definitions

### Warehouse

A warehouse can be defined as any premise (including any protected place) which includes a place for storage and/or accumulation of goods under controlled conditions and equipped for providing handling, transportation as well as value added services such as sorting, grading, packaging etc. For the purpose of this policy, a warehouse storage system may include but not be limited to the following:

- i. Warehousing complex with fixed facilities, moving units, rolling stocks.
- ii. Open and closed storage, ambient condition storage for transit period.
- iii. Fulfilment centers (in case of e-retailing) and distribution centers. The warehouses also earmark dedicated area for idle parking. In the warehousing setup, upto 10% of the covered area may be utilized for ancillary activities such as packaging, assembling, kitting etc.

### Minimum Area Norms for setting up of warehouses -

- I. Four different categories of warehouse along with minimum area requirements and minimum approach road requirements:

SL. No	Business Line	Minimum Area of Land in Acres	Minimum Access Road Required in Feet
1	Agro Warehouse	2	22
2	Agro Warehouse with Retail Facility	2	33
3	Non Agro Warehouse	5	44
4	Non Agro Warehouse with Retail Facility	5	60

### Logistics

Logistics can be defined as any commercial activity of transportation, storage and distribution of any article & thing or services by bringing together several functionalities to bring products and services at the right place, at the right time, in the desired condition with the minimum cost and highest return on investment fall under the ambit of Logistics.





### **Logistics Park**

A Logistics Park is defined as an agglomeration of a given set of logistics activities (core, value added, ancillary as well as commercial) at a particular, well-defined location. Such a park will be developed on a minimum area of 25 acres with a total investment of at least INR 25 Crore. Logistics Park should be accessible, at minimum, by a 2- lane paved road, with a minimum approach road of 60 ft.

A minimum of 85% of the total area to be used for providing logistics services and within this 20% will be permitted for industrial activities and 10% of the remaining area will be allowed for residential purposes.

For commercial activities, up to 5% of the total areawill be allowed in Medium and Low potential zones and up to 2% will be allowed in Hyper & High potential zones.

Further, new norms for conversion and other charges including for State Infrastructure Augmentation charges will be fixed in consultation with Town and Country Planning Department.

### **Integrated/Multi Modal Logistics Park (MMLP)**

An Integrated/Multi Modal Logistics Park (MMLP) is defined as a multi-modal freight-handling facility with a minimum area of 100 acres with a total investment of at least INR 100 Crore. Integrated/ Multi Modal Logistics Park (MMLP) will have the following provision:

- MMLPs should be accessible, at minimum, by a 2- lane paved road, with a minimum approach road of 60 ft.
- MMLPs should have access to a rail siding. Else, the development of the rail siding should be completed within three years of initiating the MMLP development.

Further, new norms for conversion and other charges including for State Infrastructure Augmentation charges will be fixed in consultation with the Town and Country Planning Department.

\*Across Warehouses, Logistics Park and MMLP, industrial activity will be limited to activities aligned to Logistics/Warehousing such as sorting, grading, packaging, kitting, palletization, bagging etc.

FAR on different components of the Warehouse/Logistics Park/MMLP will be applicable as per the prevailing norms of Town and Country Planning Department.

### **Cold Chain Facility**

A Cold Chain Facility is a temperature-controlled supply chain comprising refrigerated production, storage and distribution supported by equipment that can constantly maintain the required low-temperature range. It can be developed with minimum investment of INR 15 crore and minimum area of 0.50 acre with a minimum approach road of width 33 ft. The detailed guidelines in this regard may be referred to in Haryana Food Processing Policy 2018.



### **Inland Container Depot**

An Inland Container Depot (ICD) is a container storage facility situated in the hinterlands, away from any major port. Shipping companies use ICDs to store and move shipping containers before and after transporting them to the seaport. Two categories of ICD can be set up.

#### **Minimum Area Norms & Approach Road for setting up an ICD:**

- I. In the first category, wherein an ICD with a minimum area of 22 to 25 acres is being set up, the minimum approach road required should be 50 ft. wide.
- II. In the second category wherein ICD with area of more than 25 acres is being set up, minimum approach road should be 60 ft. wide.

### **New Enterprise/ Unit**

An enterprise established and commencing commercial production during the operative period of this policy. The existing enterprise undertaking expansion/ diversification at different location shall also be considered as New Enterprise.

### **Existing Enterprise/ Unit**

Any project existing and in operation prior to notification of this policy and any project undertaking expansion/ diversification/ modernization during the operative period of this policy.

### **Retail Enterprise**

Retail Enterprise is a 'shop' as defined in Section-2 (25) of Punjab Shops and Commercial Establishments Act, 1958. For Retail, the policy will be applicable to enterprises fulfilling any one of the criteria as specified below:

- i. Retail enterprise with an annual turnover of INR 1 crore or more; OR
- ii. Retail enterprise employing 10 or more people on a full-time basis.





## 2. HARYANA – LOGISTICS INFRASTRUCTURE

Haryana enjoys a locational advantage, characterized by its geographical confluence with economic corridors (DMIC, AKIC, KMP Expressway) seven Special Economic Zones, Investment Regions, and big-ticket infrastructure projects with both, the eastern and the western freight corridors and several industrial corridors passing through the state. The state has over 60% of its area under **Delhi-Mumbai Industrial Corridor (DMIC)** covering major districts in the State such as Faridabad, Palwal, Rewari, Hisar, Sonipat, Manesar, Gurugram and sizeable confluence of **Amritsar-Kolkata Industrial Corridor (AKIC)**; resulting in increasing demand for advanced logistics mainly container traffic, bulk and break-bulk cargo. The Kundli- Manesar- Palwal (KMP) expressway and the Integrated Multi Modal Logistics Park at Bawal (spread over 1200 acres) will result in large scale development of logistics and warehousing infrastructure. The 2 Km. stretch on both sides of KMP expressway will be declared as an investment zone.

The proposed **Faridabad-Palwal Industrial Area** (Node No.3 under DMIC) is located in close proximity of the western Dedicated Freight Corridor at Dadri as a result of which setting up of logistic units in Gurugram-Faridabad belt which is contiguous to Western Dedicated Freight Corridor (DFC) is expected in coming years. Another upcoming economic corridor within the State is Delhi-Hisar-Sirsa which is expected to connect the KMP expressway to Mumbai and provide a more seamless cross border movement to Punjab. In addition, Haryana has network of 29 State Highways and 15 National Highways passing through the State.

### a. Road Network

In terms of road network, 48% of state highways fall within the primary network (national and state highways), again one of the highest amongst the northern states. The lane kilometer density (national and state highways) stood at 100 Km per 1,000 Km, one of the highest in the country.

### b. Rail Network

A direct rapid railway network is also being planned between Delhi and Hisar. Haryana boasts of well-connected quality network and transport infrastructure which offers strong prospects for the development of multi-modal logistics infrastructure. As in 2016, the state has 1,710 Km. of railway route and 39 Km per 1,000 sq.km. of railway route density.

### c. Air Network

Currently, Haryana has very prominent access to international airport in Delhi along with an Integrated Aviation Hub (IAH) coming up at Hisar. The IAH Hisar is scheduled to start operations by 2023. The proposed aviation hub is expected to be developed over an area of over 7,200 acres with state-of-the-art Passenger and Cargo terminals, MRO services, Flying Training Schools, etc. To facilitate seamless manufacturing related to aerospace and defence sector, an Integrated Manufacturing Cluster (IMC) is also proposed at Hisar.

Therefore, the State requires the creation of an efficient logistics network to leverage these economic opportunities and boost trade competitiveness.

### d. Existing Logistics and Warehouse Ecosystem

Haryana is one of the leading logistics hubs in the country with a total of 9 inland container depots (ICDs) and a depot at Kalanaur in Yamunanagar which is in the proposal stage, 3 container freight stations (CFS) and 8 private freight terminals. Overall, the state has around



33 functional logistics and warehousing related units handling approx. 10 lakh TEU (Twenty Foot Equivalent Unit) of container traffic. Some of the major ICDs in the state are:

- GarhiHarsaru, Gurugram (critical for automobile and agro processing- mainly rice exports) handles upto 2,60,000 TEUs per year. It is strategically located to cover the industrial hubs in Haryana (Gurgaon, Manesar, Faridabad, Ghaziabad, Hisar, Panipat, Sonapat, Rewari and Dharuhera).
- ICD Piyala, Faridabad handling around 1,50,000 TEUs of container traffic and strategically located to serve the industrial hubs of Faridabad, Ballabhgarh and Palwal. It is connected to the Kundli-Manesar- Palwal Expressway and the Faridabad- Ghaziabad-Noida corridor.

With Haryana's emergence as a preferred **consolidated logistics hub on the lines of Mumbai and Bengaluru** along with burgeoning export orientation and industrial sector growth especially in consumer durables, post implementation of the Goods and Services Tax (GST), the cost for consumer durables is set to halve (decrease by 25-30%) for fast-moving consumer goods (FMCG). There is a need for developing advanced sector-focused logistics infrastructure for consumer durables & FMCG as well as further galvanize the export-oriented sectors mainly agro-products (rice/basmati), automobiles, electric machinery, cotton, fiber and textiles. Additionally, there are strong prospects for inland container depots (ICDs) in Haryana to serve as an alternative to container inflow/outflow from the neighboring hilly states such as Himachal Pradesh (given the high cost of transport users).

The state accounted exports of nearly INR 2,17,222 crores during the year 2021-22 which is approx. 4% of the total export by India. Exports from the state increased by 24.4% in 2021-22 (YoY), with merchandise exports contributing INR 1,15,972 crores and services export contributing INR 1,01,250 crores. Therefore, in line with its global orientation towards facilitating exports, the State Government endeavors to provide the necessary support by way of creating the necessary land bank, technology ecosystem and logistics facility. The state through its ambitious Haryana Enterprises and Employment Policy 2020, has accorded large focus to developing big ticket logistic projects in the State, along with a special package of incentives as well supporting the smaller logistic units as ancillaries. The Logistics, Warehousing and Retail Policy for Haryana 2023 takes ahead the vision and mission of Haryana's HEEP 2020 and provides incentives for developing the support ecosystem for logistics sector in Haryana.



### 3. POLICY TARGETS

#### a. Vision

The vision of the Haryana Logistics, Warehousing and Retail Policy 2023 is to create a world-class logistics infrastructure in the state that is seamlessly connected to the rest of the country. The policy aims to promote trade, reduce logistics costs, and increase competitiveness, in line with the National Logistics Policy 2022 and PM Gati Shakti National Master Plan. It envisions the development of modern logistics parks, warehousing facilities, exim logistics and multimodal transport hubs that are equipped with state-of-the-art technology and best-in-class services.

#### b. Mission

1. To develop logistics infrastructure in the state that corresponds to six pillars of PM Gati Shakti NMP i.e., Comprehensiveness, Prioritization, Optimization, Synchronization, Analytical, Dynamic.
2. Simplification of regulatory laws and procedures for the Logistics, Warehousing and Retail sectors.
3. To create quality and cost competitive multi-modal Logistics and Warehousing infrastructure as well as Retail-oriented infrastructure.
4. To promote trade and investment in the state by providing a cost-effective and efficient logistics infrastructure which in line with the National Logistics Policy 2022 and PM Gati Shakti National Master Plan.
5. To develop integrated, cost-efficient, resilient, and sustainable logistics ecosystem in the country as it covers all bases of the sector along with streamlining rules and addressing supply-side constraints.
6. To promote human capital development initiatives targeted at the creation of a labour pool skilled for the Logistics, Warehousing and Retail sectors.
7. Attracting private sector investments as well as PPP investments in Logistics, Warehousing and Retail sectors.
8. Enhancing the upgradation and adoption of modernized technologies.

#### c. Objectives

1. To develop a technologically enabled logistics ecosystem which is efficient, resilient, sustainable, and reliable.
2. To develop **Comprehensive Logistics Action Plan** for the state with focus on integrating digital logistics systems in line with ULIP and inter alia, standardization of physical assets, benchmarking service standards, human resource development, capacity building, development of modern logistics parks, etc.
3. To develop a logistics data bank of the state for real time access and enable real time update.





4. To develop data driven systems for monitoring various components of logistics ecosystem to achieve higher logistics efficiency with the help of PM Gati Shakti NMP and Unified Logistics Interface Platform (ULIP).
5. To **reduce logistic costs**(for export-import as well as domestic freight) of the state from the existing 14-18% of the country's GDP to global best practices of 8%.
6. To keep the State in **top performing category in LEADS scoring** and help the national objective to be among top 25 countries by 2030 in Logistic Performance Index (LPI).
7. The Policy aims to expedite the projects related to **first and last-mile connectivity** to existing and upcoming logistics facilities, such as dry ports, ICDs, CFS warehouses, etc., through prioritization and inter-departmental coordination. The first and last-mile connectivity would also improve capacity utilization, reduce the wastage of perishable commodities, and improve the cost efficiency of logistics facilities.
8. To **map logistics facilities** across the State to identify areas for intervention/ improvement and development. The facilities and infrastructure need to be mapped digitally to comply with the PM GatiShakti Master Plan requirements, which would bring transparency and visibility for attracting private investors.
9. To create a **Sustainable ecosystem** which adheres to Sustainable Development Goals (SDG 9: Industry, Innovation, and Infrastructure, SDG 12: Responsible consumption and production & SDG 13: Climate action) to meet international standards. The Government will promote green trucking, green fuels, green technology etc., and adopt sustainable practices towards decarbonizing the sector and compliance with the development goals.
10. Creation of at least 5 Logistics Parks across Haryana with private sector participation.
11. Attract investments to the tune of INR 10,000 Cr. in Logistics, Warehousing & Retail sectors.
12. Generate employment to the tune of 25,000 new jobs.



#### **4. Strategies for Implementation of the Policy**

The Policy will be implemented through the following approach:

##### **4.1. Comprehensive Logistics Action Plan (CLAP)**

The policy proposes to develop a Comprehensive Logistics Action Plan (CLAP) within 6-12 months from the date of commencement of the policy term, with short term, medium term and long-term goals. Planning, inventory control, packaging and handling, transportation, and information are all major components of logistics management which provides a conceptual layout and blueprint to guide future growth and development. The interventions under the CLAP are divided into specific key action areas, including (i) Integrated Digital Logistics Systems, (ii) Standardization of physical assets & benchmarking service quality standards, (iii) Logistics Human Resources Development and Capacity Building, (iv) State Engagement, (v) EXIM (Export-Import) Logistics, (vi) Service Improvement framework, (vii) Sectoral Plan for Efficient Logistics and (viii) Facilitation of Development of Logistics Parks.

##### **4.2. Establishment of a State Logistics Cell**

The Policy proposes to establish a State Logistics Cell in Haryana chaired by the Chief Secretary, Government of Haryana. It would have Heads of relevant departments such as the Department of Industries & Commerce, Home Department, Department of Transport, Department of Agriculture and Farmers Welfare, Public Works Department, Finance Department, Civil Aviation Department, Town and Country Planning Department, Haryana State Pollution Control Board etc. as its Members and Director General, Department of Industries & Commerce as its Member Secretary. The cell will act as a Think-Tank to identify areas that need improvement, bring in a holistic view of improvement areas, and provide overall direction to the growth of the logistics sector in the State. The cell would review the adoption of the State Integrated Logistics Master Plan, or any other policies or programs aimed at advancing the logistics industry in the state and performance of various Committees of logistics sector. Any private, public, or expert members may be co-opted by the State Logistics Cell (with the permission of Chair) as required for the overall growth of the logistics sector.

##### **4.3. Establishment of Policy Implementation Committee**

The State Government will set up a Policy Implementation Committee (PIC) which will function as the implementing arm of the State Logistics Cell and the Retail Sector. To ensure effective implementation and monitoring, the PIC will be headed by the Administrative Secretary of the Department of Industries & Commerce. PIC will comprise of the Director- Industries and Commerce (Member Secretary), Director- Department of T&CP, Managing Director- HSIIDC, Managing Director- Haryana State Warehousing Corporation and representatives of concerned Industry Associations (Logistics, Warehousing and Retail).

Department of Industries & Commerce will be the Nodal Agency to operate the PIC for:

1. Coordinating with various stakeholders to support the development/ enhancement/ upgradation of logistics facilities in conjunction with the different state-led visions of National Logistics Policy, National Infrastructure Plan, and PM Gati Shakti Master Plan etc.
2. Processing applications received under this Policy and will develop an internal approval mechanism to facilitate the Ease of Doing Business. The PIC, in consultation





with relevant government departments, will review the provisions of this policy from time to time and include/ amend/ remove provisions as it may deem fit for the growth of this sector.

The Administrative Secretary, Department of Industries & Commerce will be designated as the Nodal Officer of the PIC, looking after the integrated development of the logistics sector in the State. The PIC will further explore new PPP models for developing logistics facilities to promote private sector participation. The offices of this cell will be formed at every district for better implementation of the policy.

#### **4.4. City Logistics Co-ordination Committee**

The State proposes to develop the City Logistics Coordination Committee to improve urban freight efficiency and ease cargo movement. Initially, a pilot will be constituted in some cities/ urban areas of the state.

To ease and manage the freight traffic movement, the City Logistics Co-ordination Committee will be formed for 10 cities having Municipal Corporations. There will be one City Logistics Co-ordination Committee at each Municipal Corporation. City Logistics Co-ordination Committee will be chaired by respective Municipal Commissioner, City Engineer (Traffic & Transport) as Member Secretary and City Magistrate, ARTO, DCP/SP Traffic, Representative from PCB, & other related officers/officials (with the permission of Chair) as its members.

The City Logistics Co-ordination Committee will perform all tasks related to overall development of logistics at city level, including but not limited to:

- Establishing goals and a vision for the performance of the city's freight.
- Creating a city logistics strategy that is in accordance with the integrated state logistics master plan.
- Determining and promoting important initiatives and projects (like pilots) that can be carried out to enhance freight performance.
- Examining and suggesting suggestions from various stakeholders to enhance logistics planning for the city.
- Ensuring that the city's goals for freight efficiency are in line with any current or future plans for the city's transportation, car, zoning, and land use.
- Contributing to the development of the Integrated State Logistics Master Plan for effective citywide freight management.
- Engaging stakeholders from all areas of the ecosystem to create action plans that can be carried out as part of the City Logistics strategy.
- Build infrastructure with sufficient and effective green, sustainable, and environmentally friendly logistics to reduce carbon footprint.
- Monitoring and reviewing the City Logistics plan's recommendations are being put into practice.
- Any individual, official, or expert member of the logistics industry's freight forwarder and warehousing providers, organizations may be appointed to the city logistics coordination committee (with the permission of Chair).
- Freight Transport Associations, Logistics Professional Associations, and other organizations as necessary may be part of this committee (with the permission of Chair) for the sector's overall growth.

#### **4.5. Single Window Facilitation system**



.The main value proposition for having a single window is to increase the efficiency through time and cost savings for traders in their dealings with government authorities for obtaining the relevant clearance and permit(s) for moving cargoes across national or economic borders. Logistics project proposals can be directly applied through the Invest Haryana portal.

This system will help in simplification of procedures such as business registration, single source to check business eligibility for availing incentives/ subsidies, availability of desired information on current processes and procedures, elimination of multiple touch points in the approval process and reduction in turnaround time of the approval processes are some of the identified strategies to enable ease of doing business and eliminate duplication of efforts.

#### **4.6. Freight Smart Cities**

For seamless and congestion-free freight transit, Freight Smart Cities needs to be built in accordance with the City Logistics Master Plan. The goal is to develop a strong, end-to-end metropolitan city freight system that effectively addresses the needs of all stakeholders. In an attempt to realize the need for regulating the movement of products to improve city freight traffic, it will achieve the goal of improving urban freight efficiency and lowering logistics costs.<sup>1</sup> By implementing Freight Smart Cities, the government will address the key challenges of environment impact, high costs and congestion of the current urban freight system. As per the RMI report, by implementing the new freight system, India is estimated to save ~10 giga tonnes of CO<sub>2</sub>, 500 kilo tonnes of PM and 15 million tonnes of NOx emissions (by freight transport) by 2050. The government aims to reduce truck traffic on roads by making efforts towards achieving 48% decrease in vehicular-freight activity by 2050.

#### **4.7. Risk Management System (RMS)**

The State will develop a customized Risk Management System (RMS) for meeting the needs of enforcement agencies and designated zones. The proactive use of risk management system will allow to support effective business planning and operations with an evidence-based approach within the appetite set by the agencies. RMS will help in:

- enhancing security by focusing efforts on "high risk" imports and detecting dangerous, prohibited or restricted goods;
- facilitating international trade by reducing the need for physical interventions viz. inspections and examinations allowing for "fast-track" or "green channel" clearance of "low-risk" imports including imports of the clients registered under the Accredited Clients Programme (ACP);
- protecting revenues through focused targeting and interventions;
- reducing port congestion by reduction in the dwell time of customs clearance and elimination of complete physical inspection and examination of import cargo; and
- contributing to a more effective and efficient allocation of customs' resources to accelerate clearance of "low risk" imports, allowing customs to focus energies on the "high risk" imports.

#### **4.8. First mile and last mile connectivity**

Through prioritization and interdepartmental collaboration, the Policy intends to accelerate projects linked to first and last-mile connectivity to existing and planned logistics facilities, such as ICDs/MMLPs, warehouses, etc. The first- and last-mile linkage would boost logistics



facilities' cost effectiveness, capacity utilization, and the use of perishable goods. The policy also seeks to identify vital routes linking important commercial and industrial hubs.

This policy focuses on building a strong transportation infrastructure network that encourages intermodality for improved traffic links to provide last-mile and first-mile access to the state's economic centres. With systems in place, the challenges will be studied, and the State will undertake demand analysis to examine the flow of logistics throughout the supply chain. Based on empirical analysis, infrastructure development, skilling and technology interventions, the gaps will be addressed.

#### **4.9. Building Resilience for Crisis Management and Fostering Innovation**

The policy encourages the usage of modern technology and digital transformations to provide leaner and smart logistics for seamless connectivity. The State will also identify strategic logistics assets and facilitate upgrading them to meet quality standards in terms of their design, construction, and quality.

#### **4.10. EXIM Logistics**

Addressing infrastructure and procedural gaps in Haryana's EXIM connectivity, the State will create efficient and reliable logistics network, with transparent and streamlined cross-border trade facilitation, for improved trade competitiveness and greater integration of India with regional and global value chains.

#### **4.11. Logistics Division App**

The State will onboard the initiatives of Logistics Division to develop an app that will get data feed from collected common IT infrastructure as well as GST e-waybill and Vahan databases and app-based challans will be issued. The State will identify and designate specific logistics hubs as disaster support cells. The architecture and framework of the same will cascade from the ULIP platform and MoUs will be facilitated for sharing of data from private and government agencies.





## 5. Term of the Policy

This policy will be valid for a **period of 5 years** from the date of notification or till the time any new policy/amendment is introduced by the Government of Haryana, whichever is later.

## 6. Fiscal Incentives – Logistics and Warehousing

As the Logistics and Warehouse industry is treated at par with the “Industry”, the fiscal incentives as specified in HEEP 2020 for industries will be applicable for Warehousing and logistics as well and as per future Haryana’s Flagship Industrial Policy (if and when released). Over and above the fiscal incentives as per HEEP 2020 and or as per future Haryana’s Flagship Industrial Policy (if and when released), the following additional incentives will be applicable for new/expanded units:

Parameter	Incentive
Capital Subsidy	<p><b>Warehousing:</b></p> <p>Financial assistance @ 25% of the fixed capital investment subject to maximum of INR 5 Crore for units setting up in C &amp; D Category Blocks</p> <p><b>Logistics Park:</b></p> <p>Financial assistance @ 25% of the fixed capital investment up to a maximum of INR 15 Crore for developing infrastructure in Logistics Park for units setting up in C &amp; D Category Blocks</p> <p><b>Integrated/Multi Modal Logistics Park:</b> Financial assistance @ 25% of the fixed capital investment up to a maximum of INR 25 Crore for developing infrastructure in Integrated/Multi Modal Logistics Park for units setting up in C &amp; D Category Blocks</p> <p><b>Primary Processing Center</b> –As per HEEP 2020 and or any other and future Haryana’s Flagship Industrial Policy (if and when released). Post the tenure of the policy period of the HEEP 2020 and if any new policy is not released, then the same quantum of fiscal incentive as per HEEP 2020 will be applicable in this policy.</p> <p><b>Cold Chain &amp; Value addition infrastructure</b> - As per Haryana Agri-Business and Food Processing Policy 2018 and or any other and future Agri-Business &amp; Food Processing Policy (if and when released). Post the tenure of the Agri policy and if any new policy is not released, then the same quantum of fiscal incentive as per the Agri Policy will be applicable in this policy.</p> <p><b>Refrigerated vehicles</b> - As per Haryana Agri-Business and</p>



	<p>Food Processing Policy 2018 and or any other and future Agri-Business &amp; Food Processing Policy (if and when released). Post the tenure of the Agri policy and if any new policy is not released, then the same quantum of fiscal incentive as per the Agri Policy will be applicable in this policy.</p> <p><b>Centre of Excellence</b>– As per Haryana EV Policy 2022 and or any other and future Haryana EV Policy (if and when released). Post the tenure of the policy of the EV Policy 2022 and if any new policy is not released, then the same quantum of fiscal incentive as per EV Policy 2022 will be applicable in this policy.</p> <p><b>Dry Ports</b>- Capital Subsidy at the rate of 25% of FCI will be provided to ICD/ CFS/ AFS subject to a maximum INR 25 Crores for setting up the project anywhere in the State.</p>
Interest Subsidy (applicable for units setting up in C & D category blocks)	<p><b>Warehousing:</b> Financial assistance in the form of interest subvention @ 5% on loan taken to meet working capital requirements subject to a maximum of INR 10 lakhs per year for 3 years.</p> <p><b>Logistics Park:</b> Financial assistance in the form of interest subvention @ 5% on loan taken to meet working capital requirements subject to a maximum of INR 20 lakhs per year for 3 years.</p> <p><b>Integrated/Multi Modal Logistics Park:</b> Financial assistance in the form of interest subvention @ 5% on loan taken to meet working capital requirements subject to a maximum of INR 50 lakhs per year for 3 years.</p>
Skill Development/Capacity Building Incentives	<p>Re-imbusement to logistics and warehousing units on technical training cost of the worker (mainly in operational, front- line, supervisory roles) subject to a maximum of 50% of the training cost, limited to maximum INR 10,000/-, which will be provided one time per worker per training program. The training cost can be claimed by the Entrepreneur within 1 year of the date of commencement of commercial production of the Enterprise.</p> <p>The training can be arranged from any Government recognized/ approved institution.</p> <p>*The incentive is only applicable for workers with Haryana domicile.</p>
Innovation Assistance	10 start-ups will be provided fiscal incentives with a ceiling of INR 50 Lakhs per unit in B, C & D category blocks
Assistance for the installation	Reimbursement of 50% of the cost of installation of logistics





of logistics management software	management software/technology adoptionsuch as RFID, Global Positioning System (GPS), IoT, robotics & automation, blockchain, artificial intelligence, and data analytics among otherscapped at Rs. 50 Lakh, to 5companies which have their offices registered in Haryana, annually.
Assistance for the Implementation of a Quality Management System	Reimbursement of 50% of the cost incurred for the implementation of Quality Management System (IMS /ISO 9001/ ISO 14001/ OHSAS 18001/SA 8000) for their infrastructure facilities/ premises, as certified by the Chartered Accountant.  The incentive will be capped at a maximum of INR 5 Lakh to improve the quality of delivery of goods and services. This is a one-time cost reimbursement provided by the Government for cold storage/ warehouse/ integrated logistics parks/ MMLP/ any other logistics infrastructure.

**Note:**

- i. Applicants who have availed Capital Subsidy under this policy will not be eligible for availing incentive under net SGST reimbursement scheme under HEEP 2020.
- ii. Other incentives will be applicable as per Clause 1, 2, 3, 4 of Annexure 4 under the HEEP 2020 policy and future Haryana's Flagship Industrial Policy (if and when released)
- iii. The category of blocks will be as per Annexure-3 defined under HEEP-2020 policy and future Haryana's Flagship Industrial Policy (if and when released)
- iv. Mega and Ultra Mega units setting up in the State will also be eligible for a special package of incentives as per HEEP 2020 only in B,C and D Category Blockand or as per future Haryana's Flagship Industrial Policy (if and when released)
- v. The enterprise availing special package of incentives would be required to go into commercial production within three years from the date of sanction of incentives by HEEP 2020 and any future Haryana's Flagship Industrial Policy (if and when released).
- vi. This policy is also applicable to new and existing ESDM units in Haryana undertaking expansion/ diversification, subject to compliance of the following conditions:
  - a. Units undertaking expansion/diversification anywhere in B, C, and D blocks on land parcels with valid CLU permission or in Govt. approved Industrial Estates/ IMTs; and
  - b. Units undertaking an expansion/diversification, with an additional investment of at least 50% of additional investment in fixed assets of the original Fixed Capital Investment (FCI) and commencing commercial production/ operations of said expansion/ diversification during the operative period of the policy.
  - c. The expansion/ diversification by the unit can be done only once during the policy period



## **7. Simplifies Regulatory Regime- Logistics and Warehousing sector**

### **a. Single Desk Clearance Mechanism**

All permissions/licenses such as Trade License, Building Plan Approval, Occupation certificate etc. pertaining to Logistics and Warehousing will be granted on submission of common application form through HEPC (Haryana Enterprise Promotion Centre). The dedicated relationship managers will be appointed to assist the projects in obtaining the necessary clearances.

### **b. Ground Coverage**

Maximum permissible ground coverage for all units is 60% as per Haryana Uniform Building Code 2017 or and as when amended.

### **c. Setting up of a Dedicated Data Centre**

The State will create a dedicated Data Centre for capturing violations and to aid in the informed functioning of enforcement agencies. The State will also promote the setting up of PM Gati Shakti Data centres.

### **d. Green Cover Area**

Minimum area requirement for developing Green Cover for Warehousing and Logistics Sector is 15%.

### **e. Self-certification of Fire Fighting Scheme**

The state will allow Self-Certification of Fire Fighting scheme for low hazardous establishments. However, the Self-certification for Fire Fighting is subject to third party license verification and compliance to N.B.C. Part IV guidelines.

### **f. Increased Fire Exit Travel Distance from 90mts. to 135 mts.**

The state will increase the travel distance/ width of the fire exits from 90 mts. to 135. mts for Logistics and Warehousing Sector. The Department of Fire will issue a requisite notification in this regard.

### **g. Setting up “Warehousing cum Retail” facility in agricultural zone**

The Investor will be permitted to setup “Warehousing cum Retail” facility in agricultural zone in Medium and Low potential zones, where they would be operating Warehousing and retail operations from the common premises. Following are the development guidelines for this category:

- Minimum land requirement will be 10 acres.
- The Retail or Cash & Carry activity will be carried out at up to a maximum of 25% of the permitted FAR for the given land parcel.
- Auto CLU zones will be earmarked in Agriculture Zones for setting up of Warehousing cum Retail units.
- External Development Charges and Commercial license fee would be fully reimbursed in C & D category blocks.

**h. Land acquisition**

The Government of Haryana's e-Bhoomi web portal will be leveraged for identifying, matching, and addressing the land requirement of investors. The State will review the structure of clearance and procedure in the logistics sector and will rationalize them for the ease of investors. Special measures will be taken to ease the process of Change in Land Use (CLU) procedure.

**i. Increased store functioning hours**

Logistics and Warehousing facilities will be allowed to operate 24 X 7 (three shifts). This is subject to the employer providing shift-wise employee details and specifying weekly holiday for each of the employees.

**j. A digital dashboard for container**

Create a digital dashboard in the State which will reduce the turnaround time through effective monitoring of container dwell times at CFSSs, ICDs, inland/ dry ports, cold chain facilities etc.

**k. Modernization of transport Nagars**

The State may lease out the existing transport center/ nagars/ zones in PPP mode for the augmentation of existing infrastructure while encouraging a self-sustaining revenue model.

**l. Part time employment**

- Logistics and Warehousing facilities have been allowed to offer part-time employment subject to the working hours for part time employees being expressly specified.
- Minimum per hour wage rate will be proportionately determined in accordance with minimum monthly wage rate specified under Minimum Wages Act.
- This would be subject to the enterprises strictly adhering to laws regarding child labour and other similar applicable laws/rules.

**m. Women allowed in all shifts**

- Women employees will be permitted to work in all shifts of logistics/warehousing enterprise provided employer ensures occupational health, equal opportunity for women workers, safety, and adequate protection of their dignity, honour and transportation from the company premises to their residence.
- The decision however shall remain with the respective female employee as to whether she chooses to work such shifts or not.
- Companies employing women staff in night shifts shall come out with specific policy regarding safety measures put in place to ensure the safety of their women employees in such shift.

**n. Increase in overtime working hours under the Factories Act, 1948**

Overtime working hours under the Factories Act, 1948 would be increased to 115 hours per quarter which would be immensely beneficial to the workers as well as the entrepreneur. It would enable the workers to put in more hours to work, thereby earning extra wages and would also help entrepreneurs to respond to greater production requirement, as and when required.

**o. Land Availability for setting up of industrial Warehouses/Logistics Parks in**





### Industrial Model Townships- IMT (HSIIDC)

HSIIDC will reserve 5% of the area for setting up logistic infrastructure in Industrial Model Townships.

## 8. INFRASTRUCTURE AUGMENTATION FOR LOGISTICS AND WAREHOUSING SECTOR

### a. Integrated Multi Modal Logistics Hub

An Integrated Multi Modal Logistics Hub (IMLH) is being developed in PPP mode as the largest logistics hub in North India over 1,200 acres at Nangal Chaudhary, Narnaul.

- Proposed Investment – US \$ 1 billion (INR 5,000 crore) and has the potential to reduce the goods movement time from 14 days to 14 hrs.
- To be implemented as a 50:50 joint venture between HSIIDC and DMICDC/DMIC Trust – DMIC Haryana Multi Modal Logistic Hub Project Limited.
- The SPV i.e. DMIC will be the concessioning authority which will further award a concession to a prospective player (concessionaire). The concessionaire will develop various facilities in the IMLH and operate them. The concessionaire will pay lease rental for the land to the project SPV.
- The support infrastructure on the land (including railway network, roads, power supply & substation, water supply, sewerage, etc.) will be constructed by the project SPV.
- The site is abutting the Delhi Mumbai Dedicated Freight Corridor passing through Haryana.

### b. Development of Truckers Parks along the National Highways in Haryana:

The State Government will facilitate the development of Truckers Parks on a minimum of 10 acres, located along the National Highways up to 2 km on the either side.

The developer of the Truckers Park will be provided the following fiscal support:

1. 100% exemption of CLU charges
2. 100% reimbursement of EDC
3. 100% reimbursement of Stamp Duty

The key components/development norms for Truckers Parks will be as follows:

Sr.No.	Facility	Area
1	Truck parking space	85%
2	Motel and commercial activities (restaurant & retail shops, repair and service station)	10%
3	Other allied activities: Transport operators office, bulk breaking yard, Cross Docking, Weigh Bridge, medical facility, ATMs etc.	5%



**Note:** Other development norms of Department of Town & Country Planning, Environment etc. by Government of Haryana, will be duly applicable.

Further, the following support for Truckers Parks will be provided by the State Government:

- A police booth will be set up at every Truckers Park.
- All the regulatory clearances pertaining to the Truckers Park will be provided through the Single Window (HEPC: Haryana Enterprise Promotion Center).
- Connecting roads from National Highways to the site of the Truckers Park will be developed by the State Government.

**c. Earmarking a “Logistics Zone” along the KMP expressway**

A “Logistics Zone” will be earmarked along and around the KMP expressway, and all new enterprises setting up in this zone will be exempted from the requirement of CLU.

**d. Last-mile connectivity:**

Last-mile-connectivity and access to critical utilities such as water, power and access roads up to the Integrated/Multi Modal Logistics Park & Logistic Parks will be ensured on a best-effort basis and the cost towards providing the same will be borne by the State government agencies.

By ensuring last-mile connectivity and supporting the correct modal mix (raising the share of energy in efficient/green modes) through the future City Logistics Plans, the State should likewise encourage efficiency improvement in transportation modes. These strategies should also encourage efficient logistical movement, electric mobility, reverse logistics to reduce idle time, and technological advancements to lessen the impact of logistics on the environment and maximize capacity utilization.

**e. Dormitories:**

Dormitories for workers will be allowed on 1% of total permitted FAR for Logistics Parks/Multi Modal Logistics Parks/Integrated multi-Modal Logistics Park.

**f. Guidelines for developing of truck terminals within Logistics Parks and MMLPs**

The State permits Multi Modal Logistics Parks/Logistics Parks to develop Truck terminals on the minimum 15% space already allocated for Parking. The projects will also be permitted to buy more land for increasing the parking or Truck terminal area within the vicinity of the park. The terminal area must have facilities such as Parking bays, Washrooms, Repair and Maintenance workshops, Fuel pumps, Canteen, ATM, Medical units, Weighing platform (optional) etc.

**g. Earmarking Special hubs for warehousing and Logistics sector at the stage of Master Planning of “Panchgram Cities”**

The State will earmark land for developing Warehouses, Logistics Parks, and Integrated/Multi Modal Logistics Park in the master plan of Panchgram Cities. (Identified on the 135 km. stretch of KMP expressway).





## **9. Human Capital Development (Logistics and Warehousing Sector)**

### **a. Logistics & Warehousing Centre of Excellence (CoE)**

Centre of Excellence (CoE) will be established to provide trainings, facilitate research for adoption leading practices of the Logistics & Warehousing sector.

The CoE will be developed in association with leaders in the industry segment. The objective of the CoE is to analyse skill requirements and formulate various skill development modules, which are end-to-end training needs of the logistics sector. CoE will house facilities required for the up-grading skill set of people. The facilities will be built to conduct technical and non-technical training at CoE.

Govt. organizations / PSU/ private companies shall be encouraged to set up Centres of Excellence (CoE). Five such CoEs shall be incentivized with a 50% grant of project cost up to INR 5 crore. CoE shall utilize 50% of the grant in setting up of the CoE and the remaining 50% of the grant shall be used for running operations of the CoE. The grant shall be released in 5 equal annual instalments.

### **b. Curriculum Development:**

In consultation with Logistics industries, targeted curriculum will be developed, and accordingly a program will be introduced in State skilling institutions.

### **c. Targeted certified courses in ITI / SDC/ Institutes**

- To ensure availability of skilled manpower across the logistics and warehousing value chain, State Government will collaborate with Retail Association Skill Council of India and Logistics and Warehousing associations to impart necessary skills to the youth.
- State Government will also encourage Logistics and Warehousing enterprises to conduct skill development and training programmes for rural youth of Haryana.
- State Government will curate skill development and training programmes for specialised cargo services role.
- Certificate courses will be designed.
- Development of a Digital dashboard for tracking action taken under the logistics human resource strategy by concerned stakeholders.
- Collaboration at State level through Pradhan Mantri Kaushal Vikas Yojana (PMKVY), Deen Dayal Upadhyay Grameen Kaushal Vikas Yojana (DDU-GKY), State Skill Missions and with specific sector skill councils will be done with an aim to develop a mainstream logistics training system.

### **d. Human resource development and implementation strategy:**

- A study on gap assessment in job roles and existing skilling ecosystem shall be undertaken
- Stakeholder consultation under guidance of various committees
- Development of action plan with specified KPIs, timelines and milestones



## 10. SIMPLIFIED REGULATORY REGIME FOR RETAIL SECTOR

### a. Single desk clearance mechanism:

All permissions/licenses such as Trade License, approvals related to Weights and Measures etc. pertaining to Retail will be granted on submission of common application form through HEPC (Haryana Enterprise Promotion Centre). The dedicated relationship managers will be appointed to assist the projects in obtaining the necessary clearances.

### b. Relaxation in Stocking Limit:

The stocking limits of Retail units for essential commodities prescribed under Essential Commodities Act, 1955 will be relaxed for retail enterprises (multiple outlet) or departmental retail enterprises. The stocking limit for Multi chain retailer or multi retail outlet will also be enhanced. These are subject to various regulations as may be applicable from time to time.

### c. Allowed to open every day:

Retail enterprises will be allowed to stay open every day of the year provided that the employees are given compensatory, compulsory weekly offs on a preferential basis without any deduction of benefits (monetary and otherwise).

### d. Increased store functioning hours:

Retail enterprises and Logistics and Warehousing facilities will be allowed to operate 24 X 7 (three shifts). This is subject to the employer providing shift-wise employee details and specifying weekly holiday for each of the employees.

### e. Part time employment:

- Retail enterprises have been allowed to offer part-time employment subject to the working hours for part-time employees being expressly specified.
- Minimum per hour wage rate will be proportionately determined in accordance with the minimum monthly wage rate specified under Minimum Wages Act.
- This would be subject to the enterprises strictly adhering to laws regarding child labour and other similar applicable laws/rules.

### f. Women allowed in all shifts:

- Women employees have been permitted to work in all shifts of retail enterprise provided employer ensures occupational health, equal opportunity for women workers, safety, and adequate protection of their dignity, honour and transportation from the company premises to their residence.
- The decision however shall remain with the respective female employee as to whether she chooses to work such shifts or not.
- Companies employing women staff in night shifts shall come out with specific policy regarding safety measures put in place to ensure the safety of their women employees in such shift.



## **11. HUMAN CAPITAL DEVELOPMENT (RETAIL SECTOR)**

### **a. Targeted certified courses in ITI / SDC/ Institutes**

- To ensure availability of skilled manpower across the retail value chain, State Government will collaborate with Retail Association Skill Council of India and Logistics and Warehousing associations to impart necessary skills to the youth.
- The State Government will also encourage retail enterprises to conduct skill development and training programmes for rural youth of Haryana.

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