



Come. Invest. Grow.

ORISSA

'THE GROWTH STORY'

DEPARTMENT OF INDUSTRIES



INDIA

States and Union Territories



ORISSA

Vision of Team Orissa

"To usher in balanced socio-economic growth of Orissa that hinges on sustainable development with strong fundamentals of industrial growth, right harnessing of natural resources and actualization of employment potential."

Shri Naveen Patnaik

Hon' able Chief Minister
Orissa

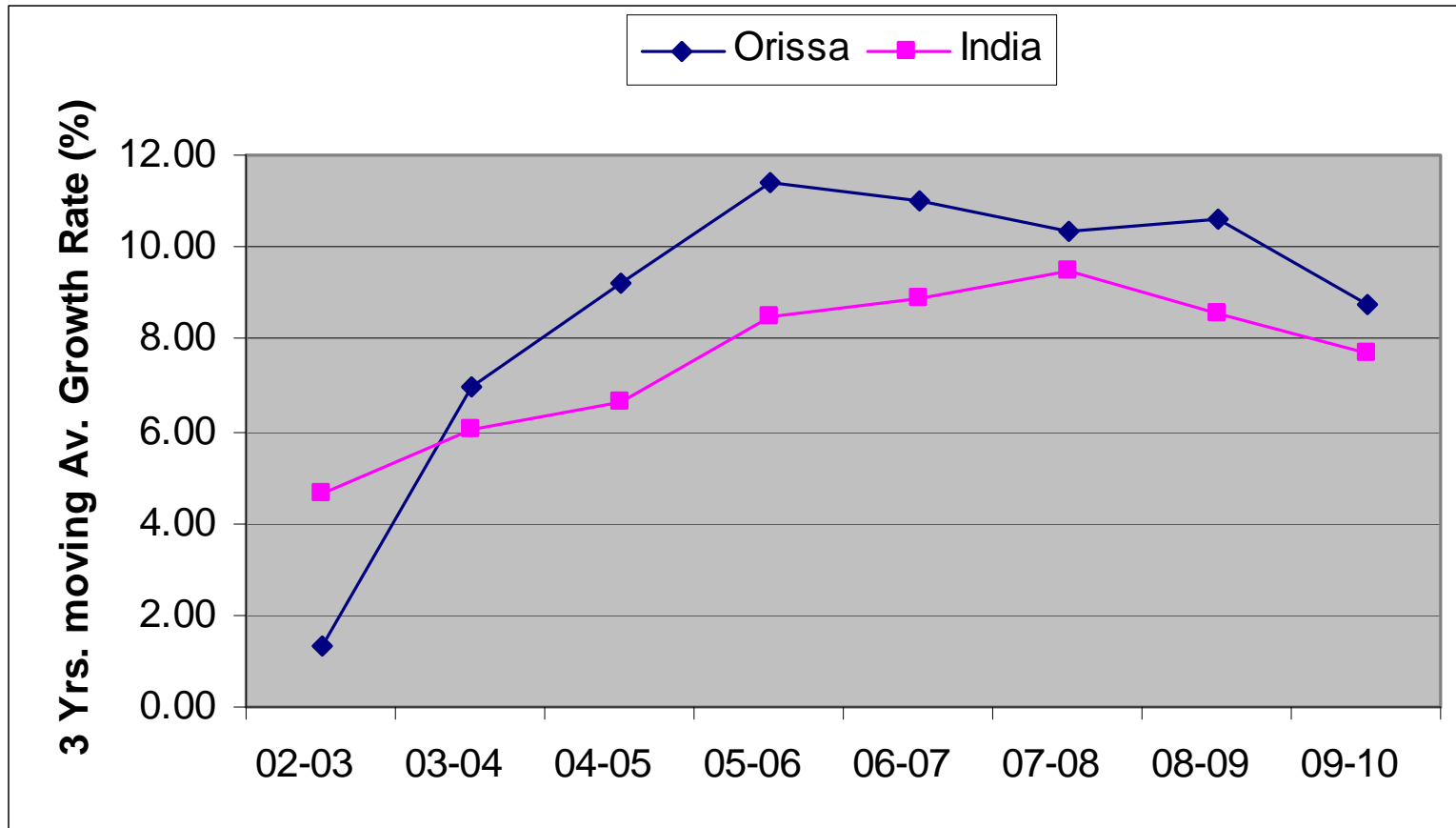


Orissa: the Growth Story

Capital	Bhubaneswar	
Area (Th. Sq. km.)	156	
Population as per 2001 Census (million nos.)	37	
Main language	Oriya	
Population density (per sq. km)	236 (313 India)	
State Net Domestic Product Av. growth rate (2002-09)	8.74% (8.49 % India)	
Road length (National & State Highways)	7,267 Kms.	
Railway route length	2339 Kms.	
Forest Area (% of total area)	37	
Coast Line (km)	480	
Mineral Resources	Million Ton	% of India
Chromites	183	98
Nickel	440	95
Bauxite	1,743	60
Iron Ore	5,428	26
Coal	61,999	24

Orissa: the Growth Story

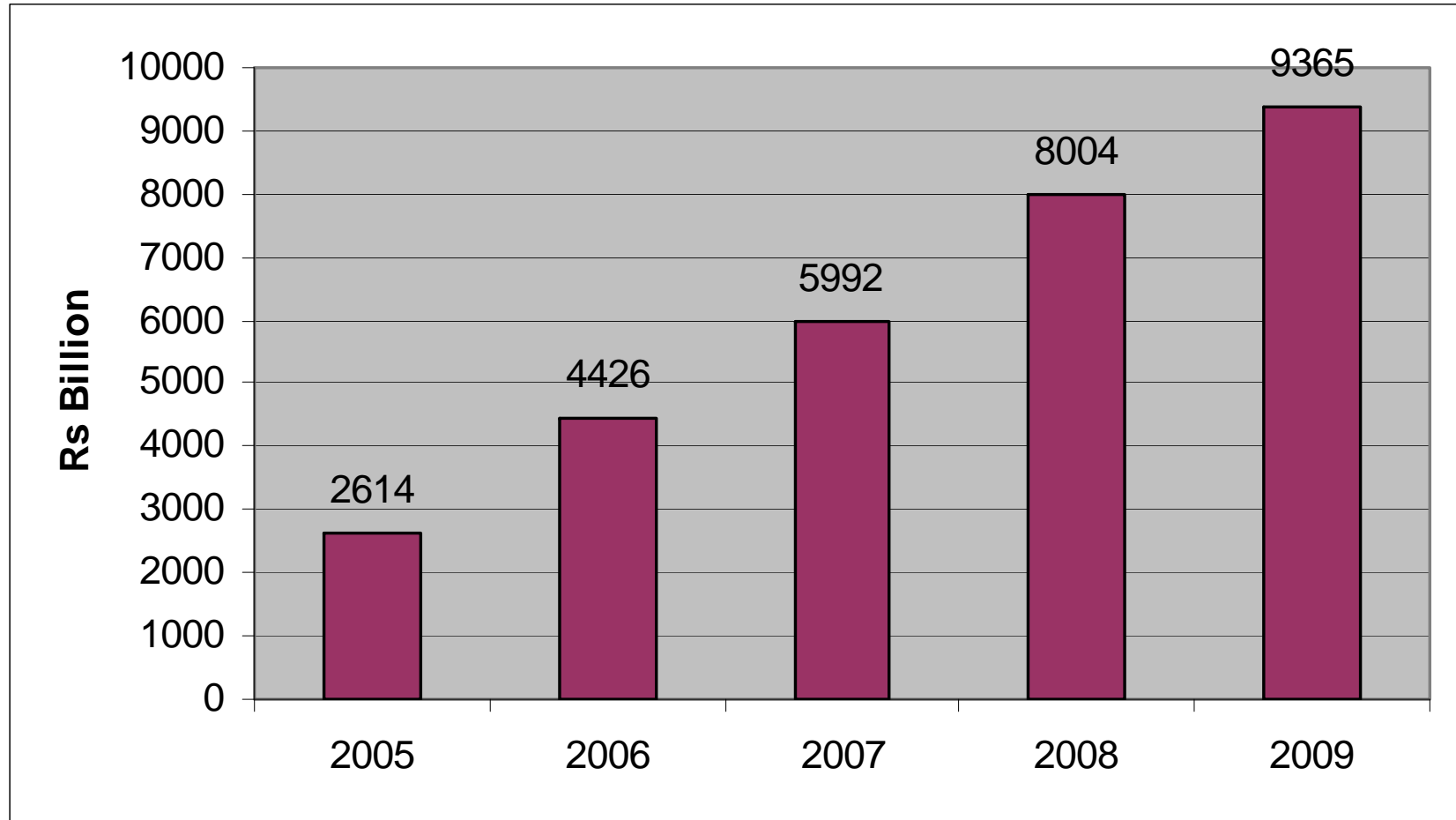
Three Years moving average of annual growth rate of GDP at constant prices of Orissa vis-à-vis India



Source: based on CSO database, CSO, 2010

Orissa: the Growth Story

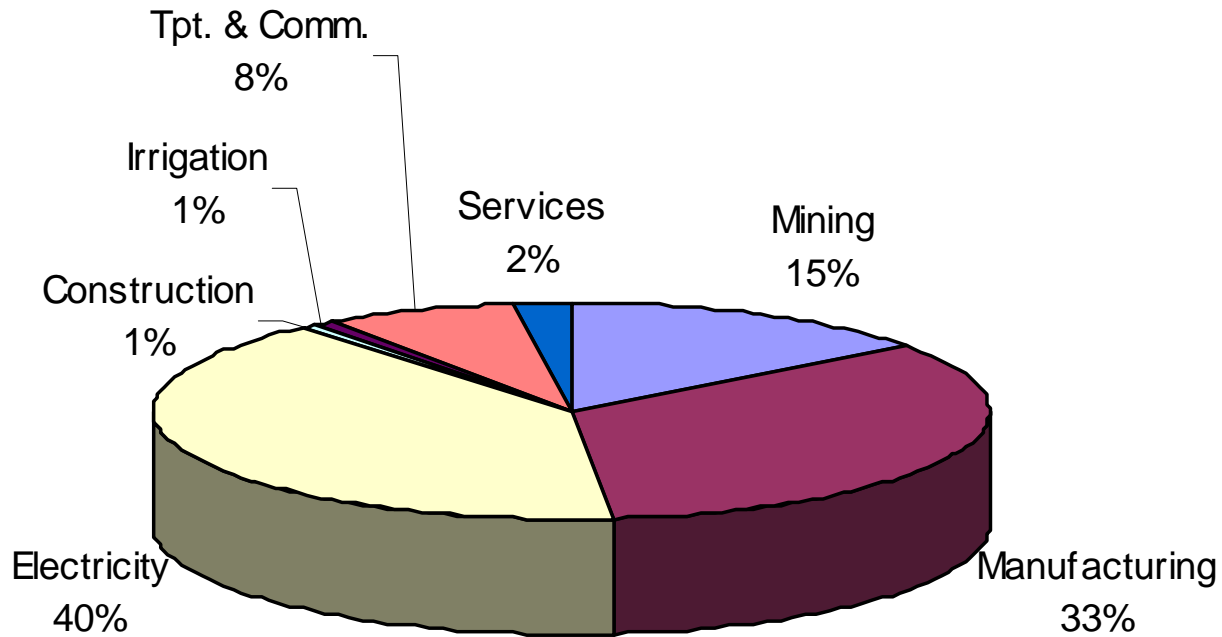
Total envisaged investments (Rs billion)



Source: based on CMIE_CAPEX database, 2010

Orissa: the Growth Story

Sectoral distribution of Total envisaged investments



Source: based on CMIE_CAPEX database, 2010

Orissa: the Growth Story

Overview of Projects under Implementation in India as on January 1, 2010

Sl.	States	Total Projects under implementation		Per capita Projects under implementation	
		Rs. billion	Rank	Rs.	Rank
1	Maharashtra	5212	1	53,800	6
2	Andhra Pradesh	4259	2	55,891	5
3	Gujarat	4199	3	82,858	3
4	Orissa	3240	4	88,020	2
5	Tamilnadu	3042	5	48,744	7
6	West Bengal	2507	6	31,265	9
7	Haryana	2304	7	108,943	1
8	Karnataka	2292	8	43,365	8
9	Uttar Pradesh	1775	9	10,677	10
10	Jharkhand	1689	10	62,692	4
	Overall India	44,822		43,572	

Source: based on CMIE_CAPEX database, 2010

Orissa: the Growth Story

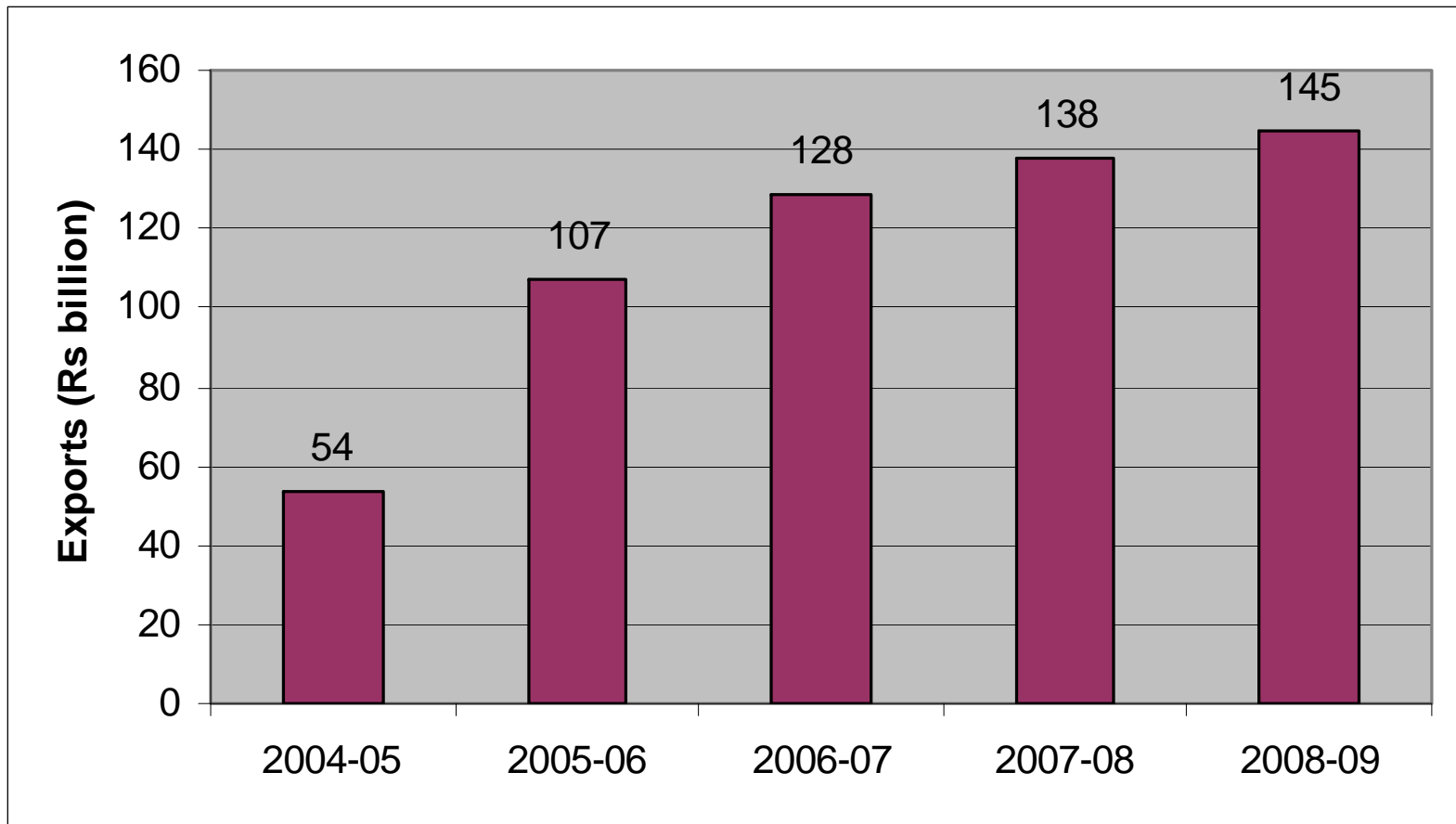
Total envisaged investments in Manufacturing Sector (Rs billion)

State	2005		2006		2007		2008		2009	
	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value
Orissa	1	1917	1	2780	1	2534	1	3255	1	3242
Jharkhand	2	1594	2	1615	2	1987	2	2695	2	3043
Gujarat	3	828	3	1267	3	1838	4	1968	3	2872
West Bengal	8	292	5	836	5	1174	3	2236	4	1960
Karnataka	5	492	6	740	6	783	7	1075	5	1718
Andhra Pradesh	4	507	4	990	4	1623	5	1600	6	1462
Tamil Nadu	6	481	9	374	10	520	6	1242	7	1345
Chattisgarh	7	308	11	327	7	608	8	1024	8	1062
Maharashtra	12	191	7	453	8	594	9	901	9	1028
Rajasthan	15	131	18	94	17	125	16	142	10	670
Overall India		8135		11635		14047		19078		21279

Source: based on CMIE_CAPEX database, 2010

Orissa: the Growth Story

Exports from Orissa (2004-2009)

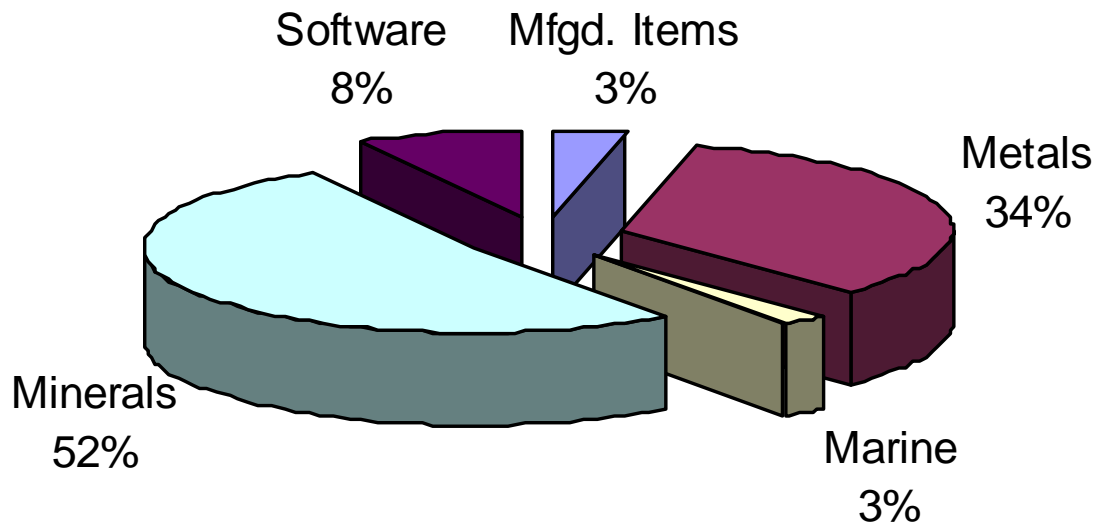


Annual average growth rate of Exports from Orissa is about 33%

Source: based on DEPM, GoO, 2010

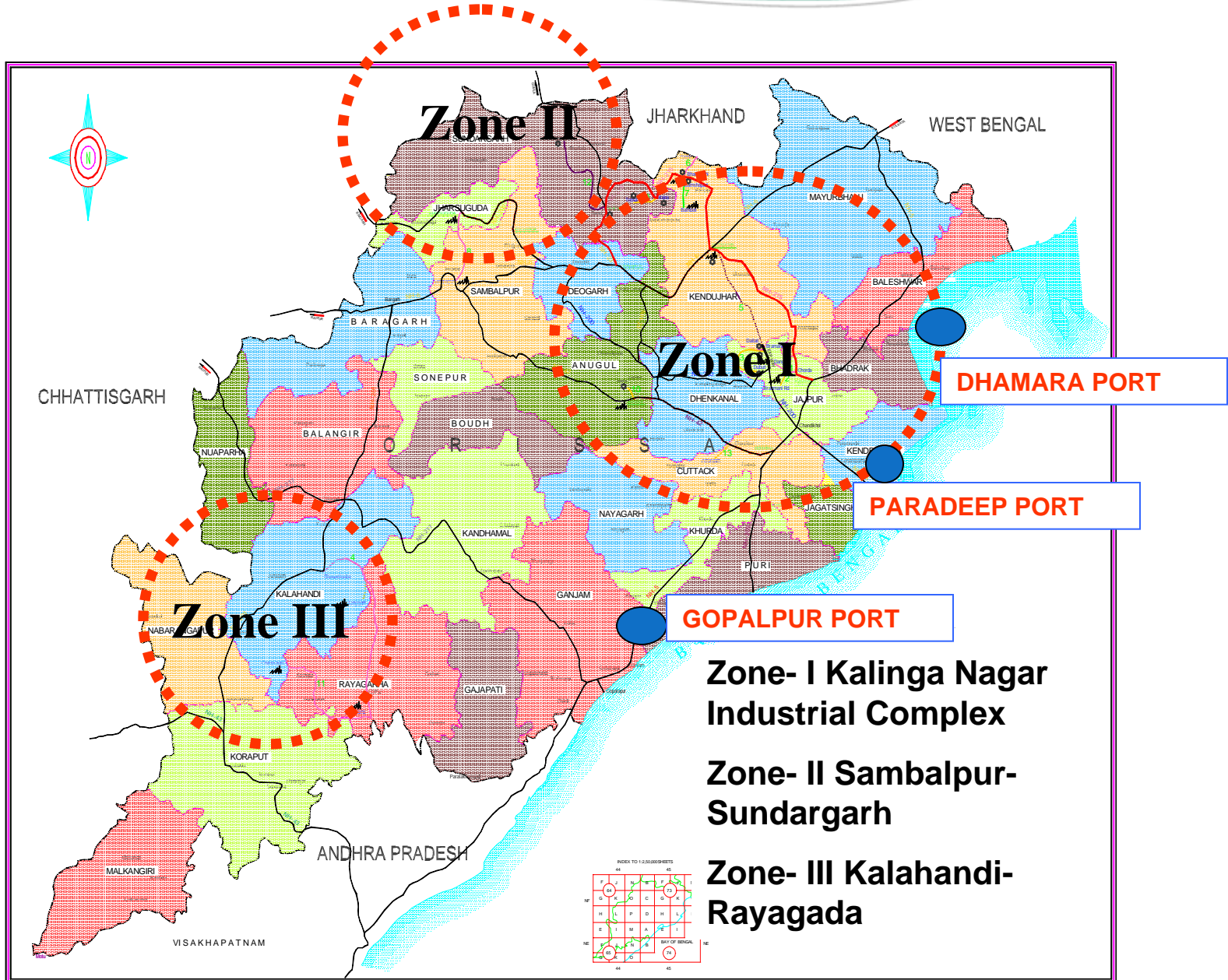
Orissa: the Growth Story

Composition of Exports from Orissa (2008-09)



Source: based on DEPM, GoO, 2010

MAJOR INDUSTRIAL ZONES & PORTS



Orissa: the Growth Story



Rourkela Steel Plant

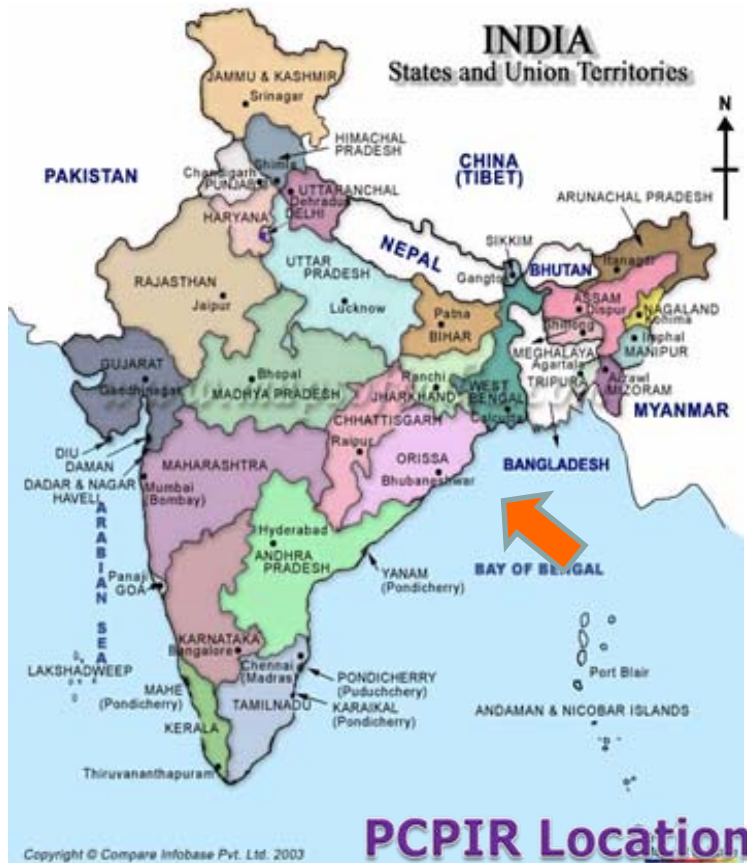
Metal Sector

- Preferred destination for Foreign & Domestic Investors
- 49 projects for over 83 mtpa of Steel (33 plants partly commissioned). More than US \$50 Bn investment
- 4 aluminum complexes with more than 4 mtpa alumina and 1 mtpa aluminum smelter capacity under implementation (US\$ 7 Bn)
- Rare earth projects through FDI mode (US\$ 0.50 Bn)
- Major investors in the metal sector - POSCO, Arcelor-Mittal, Tata Steel, Bhusan, Jindal, Essar, Aarti, Hindalco, Vedanta, RSB, AMTEK and others.



Workshop

Orissa: the Growth Story



Chemical & Petrochemical

- 15 mtpa mega petrochemical complex by IOC (US\$ 6Bn) at Paradeep
- Deepak Fertilizers implementing 2 chemical projects at Paradeep
- Mega Petroleum, Chemicals & Petrochemicals Investment Region (PCPIR) under development in Paradeep area

Orissa: the Growth Story

Mega Infrastructure Projects



Paradip Port



Road in PPP mode

- Major expansion of Paradip Port underway
- 6 new Ports (US\$ 3 bn) at Dhamra, Gopalpur, Jatadhari Muhana, Kirtania, Astaranga & Chudamani
- 14 SEZs including 5 IT SEZs approved by Gol
- Over \$ 5 bn investment in Road sector in next 5 years
- About \$ 1.5 bn investment in Railways in next 5 years
- Massive urban infrastructure upgradation through national level programmes
- Extensive Rural Electrification programmes
- Bhubaneswar Airport modernization
- 43,000 Acres of land allotted to Industrial projects

Petroleum, Chemicals & Petro-Chemicals Investment Region (PCPIR) at Paradeep

- ➔ 109.71 Sq Miles (28414 HA) in Coastal districts of Orissa
- ➔ Operational Fertiliser Units in the region
- ➔ Indian Oil Corporation Ltd (IOCL) is the Anchor Tenant of the PCPIR which is putting up a 15 MMTPA of refinery & petrochemical complex

- ➔ Infrastructure Connectivity
 - ❖ Proximity to Paradeep Port
 - ❖ 4-6 Lane Highways
 - ❖ Broad Gauge Rail connectivity
 - ❖ Proximity to water sources in the region
 - ❖ Availability of developable land
 - ❖ Proximity to coast for marine disposal of treated effluents



INVESTMENT OPPORTUNITIES In Petroleum & Petrochemicals Sector

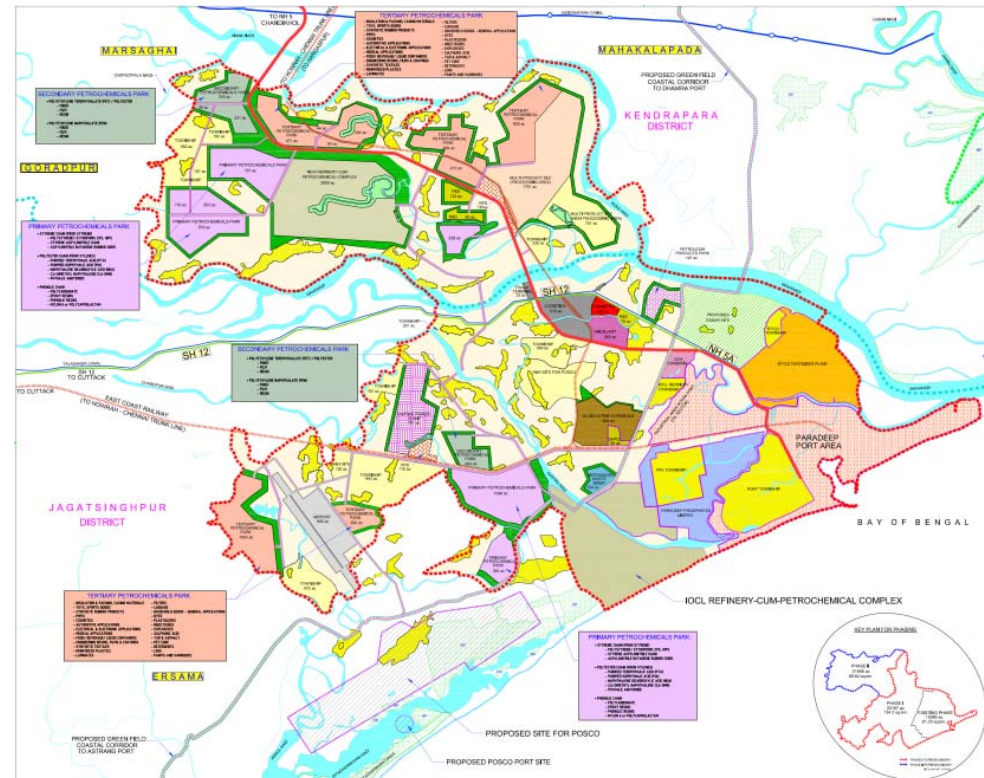
Investment opportunities in Paradeep PCPIR: **USD 57,111 Mn**

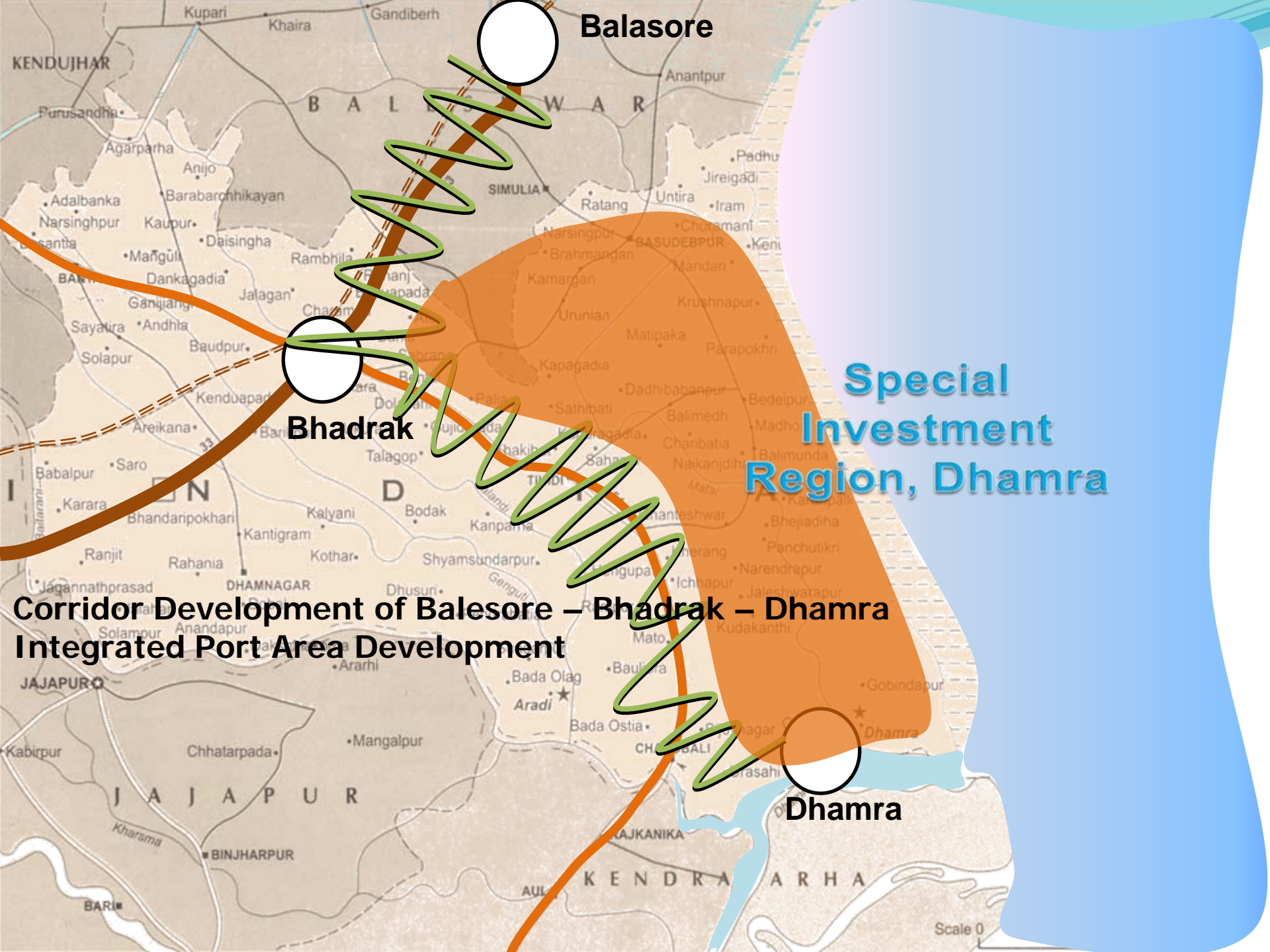
➔ Sector-wise investment estimates based on:

- ❖ Target Sectors identified & Master Plan provisions
- ❖ Prevailing industry norms and professional judgement

➔ Total direct & indirect employment at Paradeep shall be – 0.65 Mn people

Sl	Sector	Investment (in USD Mn)
1	Petroleum & Petrochemicals	47916.67
2	Chemicals & Fertilizers	729.17
3	Ancillary	729.17
4	Housing & Allied Infrastructure	4895.83
5	External Infrastructure	2840.42
	Total	57111.26





Balasore

Bhadrak

Dhamra

Special Investment Region, Dhamra

**Corridor Development of Balesore – Bhadrak – Dhamra
Integrated Port Area Development**

Scale 0

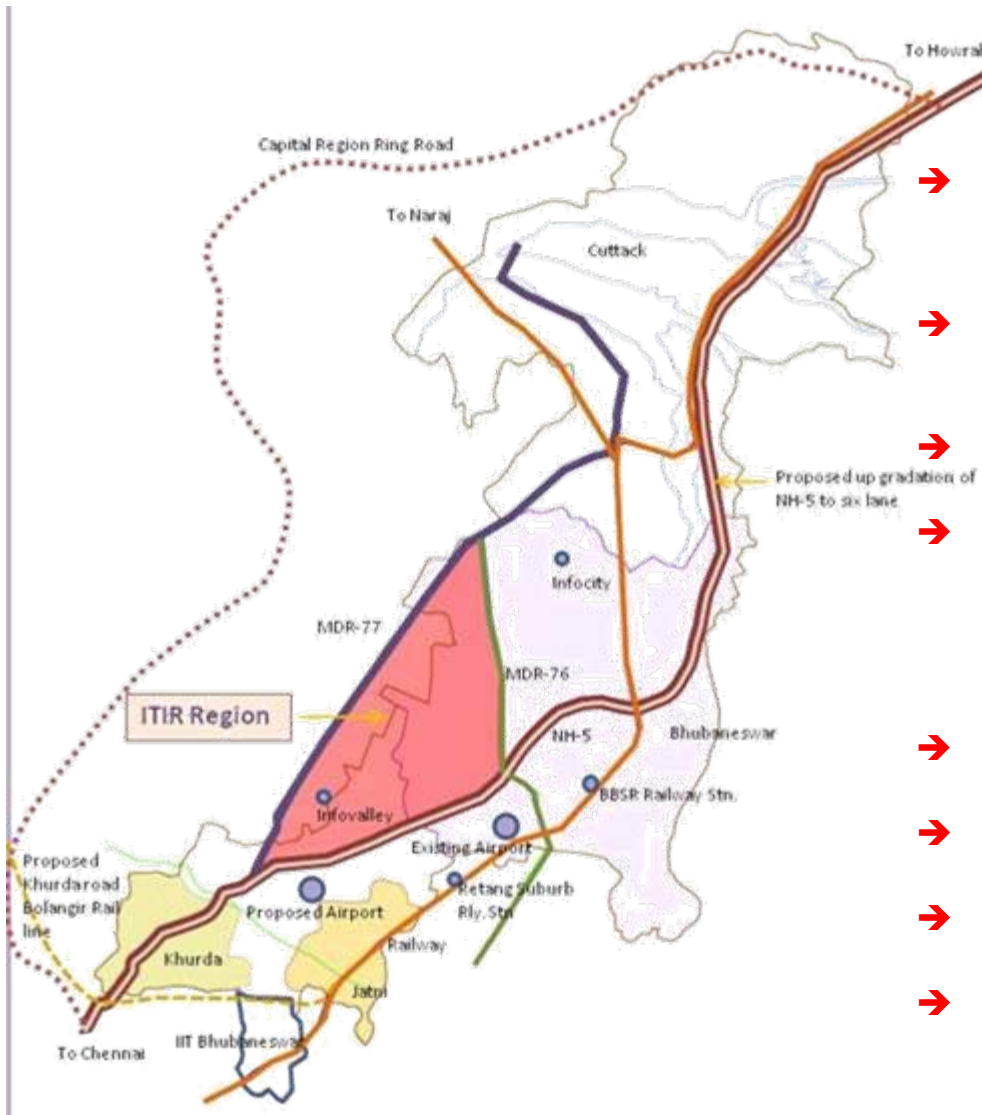
Special Investment Region at Dhamra

- Strategically located near the Steel cluster of Orissa
- Drivers of the Project
 - 1. Upcoming Port at Dhamra (USD 615 Mn. in 1st phase)**
 - Draught for bigger vessels(18.00 mts)
 - Dedicated Utilities Corridor (Rail & Road Corridor)
 - 2. Proposed ship building by Apeejay Group (USD 325 Mn)**
 - Access to **Kolkata – Chennai Freight Corridor**
 - Proximity to the Proposed National Gas Grid
 - Recent **Natural Gas finds** by Reliance, GAIL-Gazprom & ONGC on the offshore
 - Availability of **Land Parcels for development**
 - **Opportunity for Manufacturing industries**



- Dhamra is being planned for Special Investment region
- Spread over an area of more than 96 Sq Miles

IT Investment Region



- ➔ Orissa emerging as an IT / ITES powerhouse with presence of Infosys, Satyam, Wipro, TCS, Mindtree, Genpact
- ➔ To accommodate future development in IT sector , an ITIR is proposed to be developed on the southern part of Bhubaneswar
- ➔ IT Investment region shall have both software and hardware units within it
- ➔ The proposed ITIR shall cover an area of approximately 10,000 Acres
 - ➔ 40 % processing Area
 - ➔ 60 % non processing Area
- ➔ It shall generate 2.3 lakhs jobs and shall accommodate @ 5.4 Lakh population
- ➔ Total investment envisaged in development of ITIR is **USD 3974 Mn**
- ➔ More than 75 % of the investment shall be made by PPP
- ➔ Opportunities for IT / ITES & companies within the ITIR

Choudwar Rourkela Industrial Corridor

The Corridor would provide an enabling environment for the promotion of Public-Private Partnership (PPP) Projects

Industrial Infrastructure:

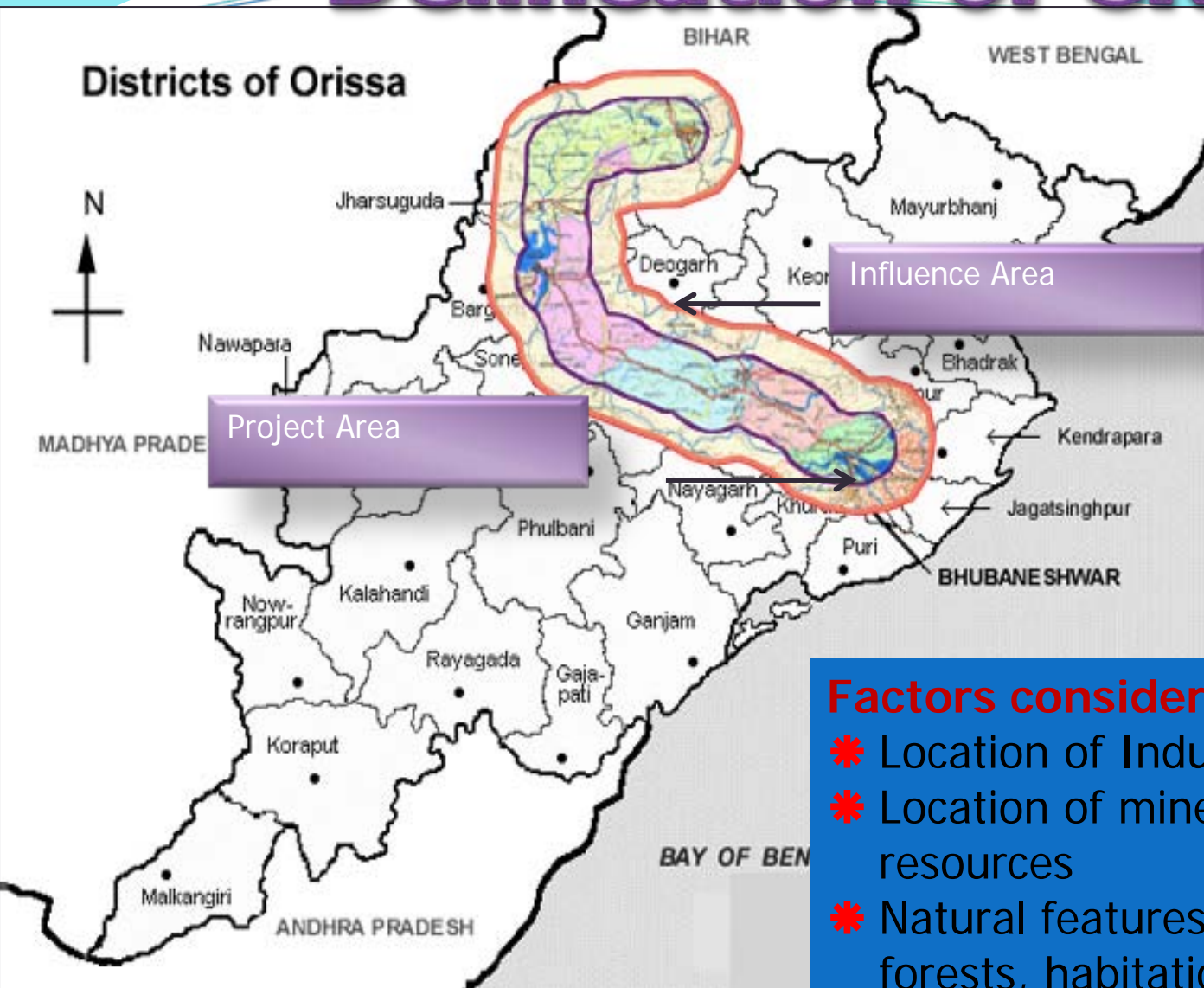
- Up gradation of existing industrial clusters/industrial areas;
- Developing export oriented manufacturing zones;
- Development of 'Skill Development Centers (or) Knowledge Hubs'.
- Developing agro-processing hubs research and development facilities.
- Industrial water supply projects

Physical and Social Infrastructure:

- Efficient logistics chain with multi-modal transshipment zones and logistic hubs;
- Provision of Feeder Road and Rail connectivity to ports, hinterlands and markets;
- Social infrastructure projects such as schools, colleges, vocational and tech. institutes
- Residential, commercial, institutional, recreational infrastructure projects.



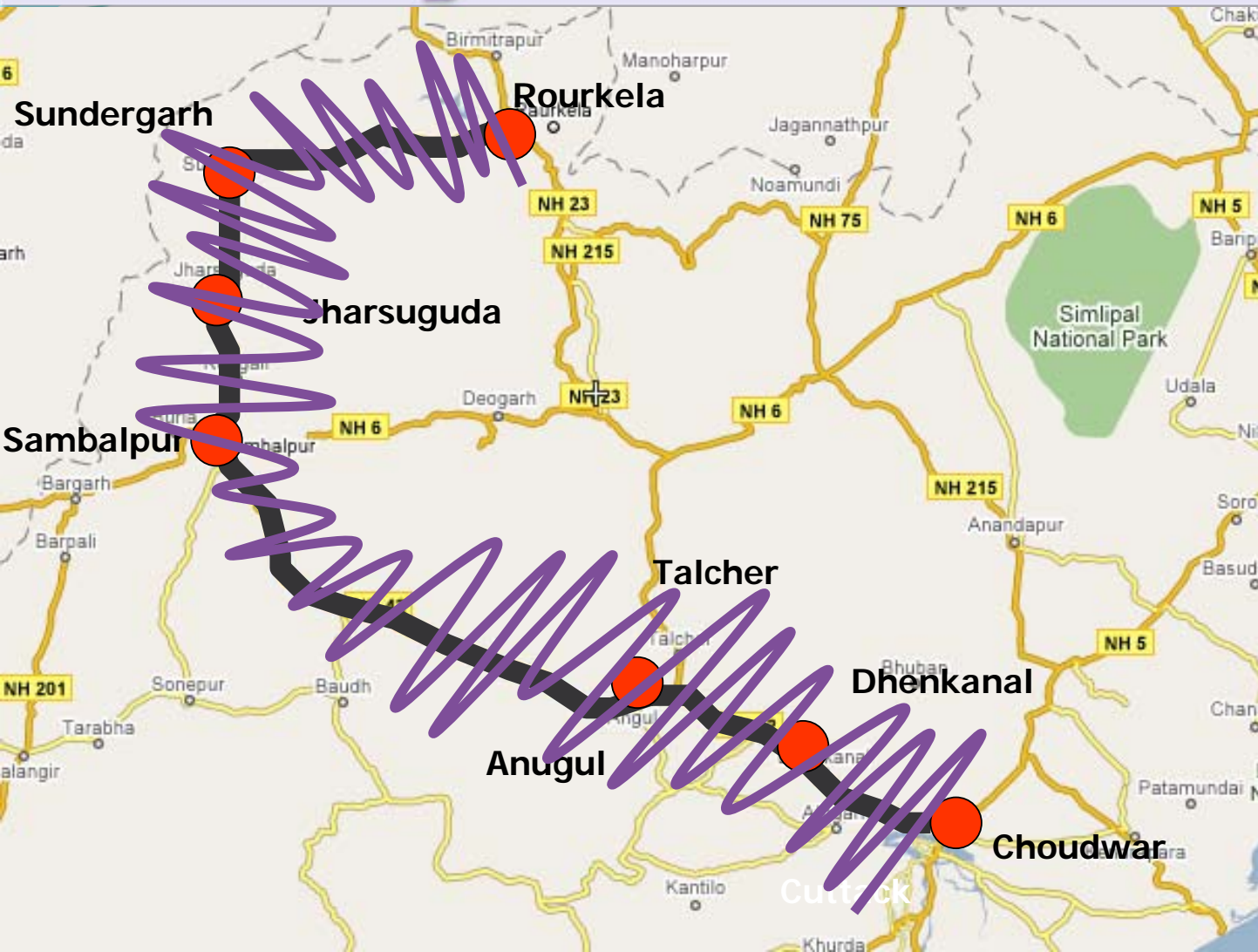
Delineation of CRIC



Factors considered:

- * Location of Industrial units
- * Location of mines and mineral resources
- * Natural features like river basins, forests, habitations
- * Major Urban habitats such as district headquarters

Project Influence Area



- ❖ Urban and Industrial development along the spine of NH 42 and SH 10
- ❖ 20 km on either side of NH 42 and SH 10
- ❖ Mahanadi river basin on Eastern, northern side and Brahmani on western side of boundary.

INFO Park, Bhubaneswar



- 54 acres state-of-the-art IT PARK opposite Infocity in Chandaka IE for IT, ITES industries.
- Project to offer over 40 lakh sft. of quality built-up space out of which 60% would be IT space
- Project to commence

Konark Knowledge Park

- The facility is to be located at Andharua on a land parcel of 26.00 Ha
- The Park shall house the following
 - Modular Laboratories
 - Loaded Wet Laboratories
 - Common Equipment facilities & amenities (incubation center)
 - Pilot Plant
 - Training & Research Center
- The facility shall also have IT and Pharma industries
- M/s Bharat Biotech International Limited selected as Project Developer after competitive bidding process
- Lease cum development agreement to be signed with M/s Konark Knowledge Park Pvt. Ltd (SPV)
- Total Investment envisaged is USD 25 Mn



Other Projects

Aluminium Park at Angul

- MoU signed with NALCO for setting up a Industrial Park to accommodate Aluminium based Downstream Industries. JV between IDCO & Nalco to be signed
- The Park is to be located on 250 Acres land near Angul
- Tentative investment envisaged is USD 18.75 Mn

Mind Space IT Park

- The facility is located at Rasulgarrh on a 25 Acres of Land Parcel
- The facility shall have IT/ ITES space, convention center, commercial space etc.
- MoU signed with M/s K Raheja Corp
- Lease Agreement to be signed soon

Haridaspur – Paradeep Broad Gauge Rail Line

- A Special Purpose Vehicle HPRCL formed for implementation of the 51 Miles new broad gauge rail connectivity to Paradeep from Haridaspur which shall be an extension of Daitari/Tomka-Banspani
- Direct port connectivity from Iron Ore and Steel industry belt
- IDCO has contributed USD 0.5 Mn in the equity of the SPV

Jajpur Cluster Development

- USD 20Mn Steel & Metallurgical Cluster development project approved by the GOI under IIU Scheme
- USD 11.75 Mn GOI grant, USD 4.50 Mn IDCO's share. Balance, USD 3.75 Mn contributed by the industries
- Project SPV (JCDDL) already operational
- Work is under progress



- ➔ Total 27 bus terminals at various locations in the State studied for development through PPP
- ➔ 6 bus terminals (Bhubaneswar(2), Cuttack, Dhenkanal, Angul & Sambalpur) proposed to be developed in the 1st stage on BOT
 - ➔ Concession period – 17 years
 - ➔ Lease period of commercial – 90 years
- ➔ Pre-Feasibility Study completed & bidding documents prepared.
- ➔ Developers / lenders consultation workshop done
- ➔ Bidding to commence shortly

Orissa: the Growth Story



Energy & Power

Energy and Power

- 27 Thermal Power Projects on the anvil: Capacity 32,000 MW (US\$ 30 Bn)
- Major names include Tata Power, Sterlite Energy, Mahanadi Aban, Monnet Ispat, Essar Power, Lanco Group, Nav Bharat Power, CESC, GMR Energy, Sahara, and Jindal
- Various Mini-Hydel projects with a combined capacity of 100 MW

Cement

- 5 mtpa capacity addition utilising fly ash and blast furnace slag (\$ 0.50 Bn)



Power Sector

Orissa: the Growth Story



Exotic Beach at Puri



NALCO

Tourism

- 6 million tourists visited Orissa in 2007
(growth rate >13%)
- Foreign tourists 41,000
- **Shamuka Beach** near Puri spread over 1000 acres under development

Ship building & ship repairs

- Bharati Shipyards and Apeejay Surendra have proposed to set up a mega Shipyard at Dhamra

Auto components

- RSB Global near Cuttack

Orissa: the Growth Story



Satyam Campus,
Bhubaneswar



Infosys Campus,
Bhubaneswar

Information Technology Sector

- Orissa emerging as an IT / ITES powerhouse with presence of Infosys, Satyam, Wipro, TCS, Mindtree, ICICI Bank, Genpact (200,000 software professionals by 2015)
- SMEs: More than 300 units and 12000 software professionals engaged in the state
- Group of investors from Silicon Valley setting up 5000 seater IT/ITES facility
- Target of exporting software: US \$ 1 bn by 2011-12

Orissa: the Growth Story

Skill Development

Hub of engineering, management & medical education in Eastern India

- 13 Universities, 100 Engg./60 MCA/75 MBA, 6 Medical colleges/17 Pharmacy institutions
- Large base of Semiskilled Technical Pool
- Polytechnics (>100) and ITIs (>500) in Govt. and Private sector
- Technical & Management-Intake capacity>1,30,000
- Center of Excellences:
IIT, NISER, IoP, IoM, IIIT, CIPET, IMMT, AIIMS, IoM, NID, NIFT
- Modern health service providers set facilities in Bhubaneswar: Apollo, L.V Prasad Eye Institute, CARE Hospital



Utkal University,
Bhubaneswar



KIIT University,
Bhubaneswar

Orissa: the Growth Story

- Recent FDI projects in Orissa

- Largest FDI of US\$12 Bn by Korean Steel Giant POSCO in steel sector
- Other prestigious FDI projects:



Biju Patnaik
International Airport



Nine hole Golf Course
at Infocity

Steel	Arcelor-Mittal
Alumina / Aluminium	Vedanta
Titanium Products	JSC Technochim Holding (Russia)
Lime	Lhoist (Belgium)
Industrial Gas	Air Liquide (France) PRAXIR (USA)

Orissa: What the experts say



McKinsey&Company

- **Mc Kinsey 2005:**

“Orissa’s economy is poised to grow at 7.1% over the next 10-12 years, the highest in Eastern India”

(Av. Growth rate of State GDP in 2004-09- 8.74%)



Morgan Stanley

- **Morgan Stanley 2005:**

“Orissa shall emerge as a centre for metals business in India and attract investments up to US\$ 30–40 Billion over the next 5 years”

(> US \$ 120 billion investment proposal)



CMIE

- **CMIE 2008:**

“Orissa ranks first in India in terms of value of total envisaged projects as well as projects under implementation in India ”

- **World Bank 2009:**

“Bhubaneswar ranks 3rd among cities in ease of doing business within India”



The World Bank

- **ASSOCHAM , India:**

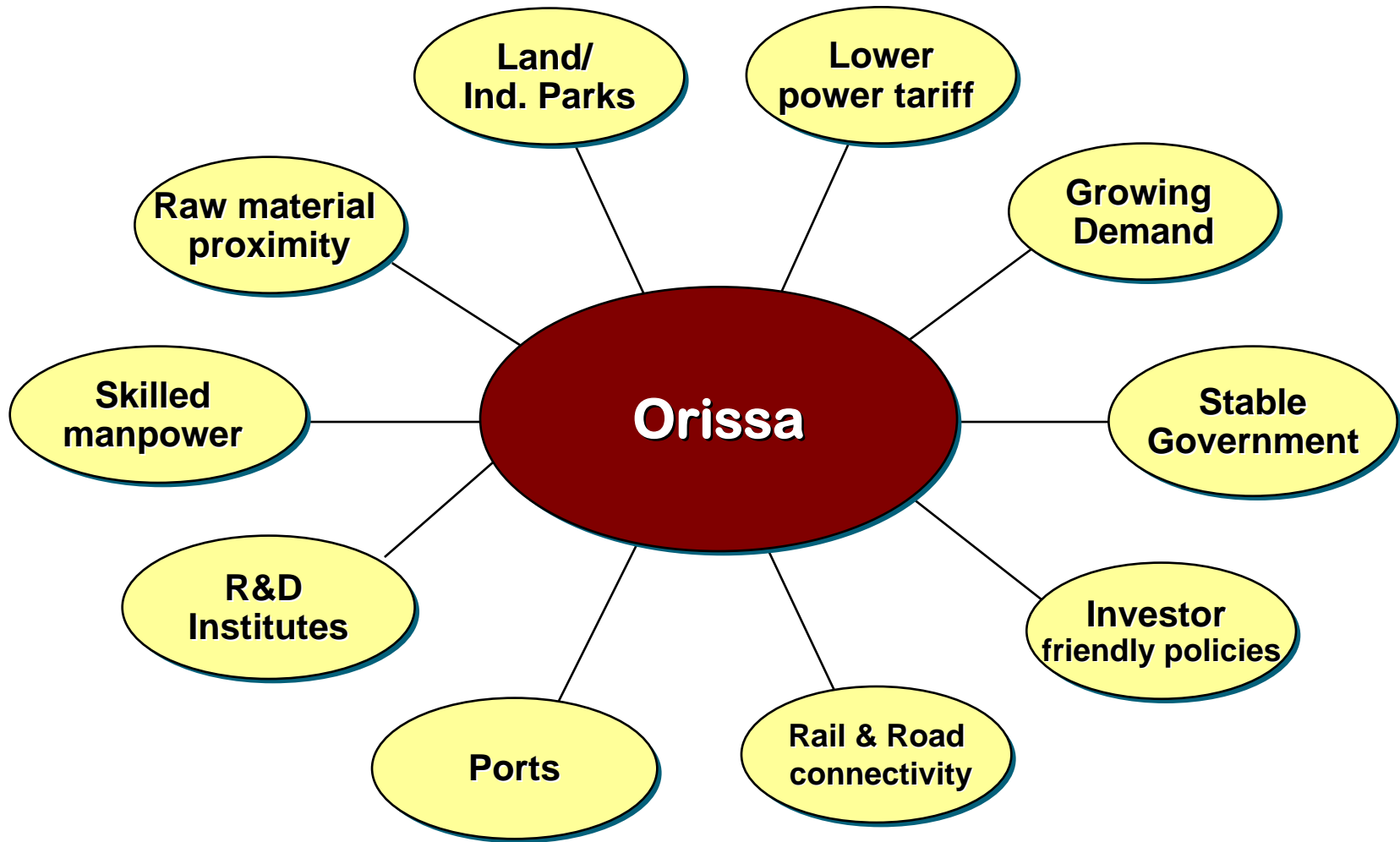
“State economy of Orissa grew by 8.0% (8.7% All India) during the eight year period to March 2009”



ASSOCHAM



Why to invest in Orissa?



Thank You



Come. Invest. Grow.

www.teamorissa.org

www.orissagov.nic.in

Committed Projects as on 10 June 2010
More than 130000 Mn USD

Steel, stainless steel & Sponge Iron	59
Aluminium	7
Power (including Solar)	38
Cement	15
Ferro Manganese	6
Food Processing	2
Auto Component	2
Ship Building	1
Petroleum Coke	3
Ammonium Nitrate	1
Caustic Soda	1
Titanium dioxide	1
News Print	1
Others	15
TOTAL	152

Policy Reforms

- **Mobilizing and Empowering the Poor**
 - Women Self Help Groups (Mission Shakti)
 - Water Users' Associations (Pani Panchayat)
 - Employment Generation Programmes
- **Health sector Reforms**
 - Infant Mortality Rate Mission (IMR) Mission launched
 - IMR reduced from 96 in 1999 to 65 in 2005
 - Five major killer diseases (Malaria, Diarrhoea, Acute Respiratory Infections, TB & Scabies) focused measures launched (*Panchvyadhi* Scheme)
 - Mobile Health Units for tribal areas
 - Orissa Health System Development Project
 - Improving infrastructure and modern equipments for health institutions
 - Implementation of Drug Management Policy
 - Computerisation of Drug Inventory Management System

Policy Reforms

- **Power sector Reform**

- Orissa first State to undertake power sector reforms
- Orissa Electricity Reform Act 1996
- Unbundling of generation, transmission and distribution
- Privatization of generation & distribution

- **Public Enterprises Reforms**

- Enterprise specific initiatives – privatisation, closure and restructuring
- VRS
- Social Safety Net

Policy Reforms

- Industrial Policy Resolution (IPR) - 2007
- MSME Development Policy-2009
- Public Private Partnership Policy-2007
- Resettlement and Rehabilitation Policy (R&R) – 2006
- Agriculture Policy
- State Water Policy
- Port Policy
- Policy Guidelines on Power Generation Non Conventional Energy Sources
- Policy Guidelines for raising Energy Plantations and Bio-diesel Production
- Food Processing/PPP/SEZ/CSR/Mineral Policy: In pipe line

Fiscal Incentives*

- Land & Shed at special rates
- Stamp Duty Exemption
- Entry Tax Exemption
- CST not exceeding 2 % for 10 years limited to 100% of Fixed Capital Investment (FCI)
- VAT Reimbursement
 - ▶ Priority Sector-75% of VAT paid for 5 years limited to 100% of FCI
 - ▶ Thrust Sector-75% of VAT paid for 10 years limited to 200% of FCI
- Interest Subsidy
 - ▶ @ 5 % for 5 years limited to- - Rs 100 lakh
- POWER
 - ▶ 100 % Electricity Duty exempted for 5 years up to 5 MW

*Conditions apply

“To usher in balanced socio-economic growth of Odisha that hinges on sustainable development with strong fundamentals of industrial growth, right harnessing of natural resources and actualisation of sustainable employment potential.”



Naveen Patnaik
Hon'ble Chief Minister

COMMITTED INVESTMENTS IN DIFFERENT SECTORS : Rs.9 lakh Crore

MAJOR INVESTMENT AREAS

STEEL

Rs. 2,30,422 Crore

POWER

Rs. 1,35,203 Crore

ALUMINIUM / ALUMINA

Rs. 29,926 Crore

PETROLEUM

Rs. 25,646 Crore

AUTO ANCILLARY

Rs. 16,185 Crore

CEMENT

Rs. 2,182 Crore

TITANIUM

Rs. 1,150 Crore

STAINLESS STEEL / DOWNSTREAM PARK

Rs. 704 Crore

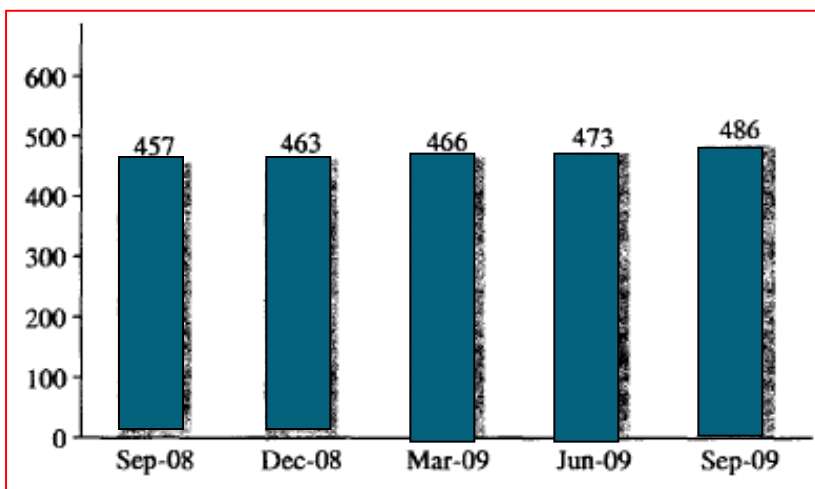
Investment in the Industrial Sector will provide employment to more than five lakh people, directly and indirectly ensuring better quality of life and access to education and healthcare.

Orissa: Investments stood at Rs.9,41,498 crore as of September 2009

Projects	Sep 2008		Dec 2008		Mar 2009		Jun 2009		Sep 2009	
	Nos.	Rs.cr.	Nos.	Rs.cr.	Nos.	Rs.cr.	Nos.	Rs.cr.	Nos.	Rs.cr.
At the end of the Qrt.	457	7,43,496	463	7,73,008	466	9,20,815	473	9,31,763	486	9,41,498
Announcement	273	4,18,507	272	4,27,246	264	6,01,563	262	6,04,563	269	6,16,287
Under Implementation	171	2,66,301	173	2,86,349	178	2,95,046	187	3,04,030	193	3,06,575
Nos Information	9	50,440	10	50,416	11	14,455	10	9,120	11	9,245
Implementation - stalled	4	8,248	8	8,996	13	9,750	14	14,050	13	9,390

Investment trend in Orissa

(number of out-standing projects)



Distribution of Investments as of September 2009

	Total	
	Nos.	Rs.crore
Manufacturing	140	3,26,387
Mining	66	1,46,535
Electricity	120	4,03,045
Services	134	59,720
Irrigation	9	2,404
Real Estate	17	3,407
Industry	486	9,41,498

Key Contacts

- **Commissioner-cum-Secretary to Government, Department of Industries, GoO**
Orissa Secretariat,
Bhubaneswar-751001, INDIA
Tel.- +91-674-2536640/ 2390253; FAX- +91-674-2536819/ 2396299,
[Email: indsec@ori.nic.in](mailto:indsec@ori.nic.in) [URL: www.orissa.gov.in](http://www.orissa.gov.in)
- **Industrial Promotion and Investment Corporation of Orissa Limited (IPICOL),
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Opportunity Orissa

- Development of Industrial Parks and SEZs
- Economic & social infrastructure in industrial and mining corridors – Roads, Water supply, Housing, Hospitals, etc
- Construction including industrial construction, townships, Roads, Ports, Air Ports and other infrastructure
- Technology applications in utilization of fly ash and blast furnace slag
- Clean Development Mechanism (CDM) projects – green manufacturing processes and technology

Opportunity Orissa

- Automobile sector including Auto-component
- Ancillary / downstream / construction phase projects of Mining / Steel / Aluminium / Petrochemicals
- Equipment and technology suppliers & vendors
- Heavy engineering and fabrication
- Plant and machinery for ports, roads, industrial water supply, mining equipment, etc.
- Power projects – coal washing, modernization of existing units, renewable energy
- Marine fisheries, food processing & related infrastructure
- Services sector
- Tourism
- Information Technology / ITES

Thrust Sectors as per IPR- 2007

Sector	Minimum Capital Investment (Rs million)	Minimum Direct Employment Generation (Nos)
Ancillary & Down Stream	Rs. 100	100
Automobiles	Rs. 3000	500
Auto- Components	Rs. 500	200
Agro- Processing	Rs. 250	100
Apparel	Rs. 100	500
Textile	Rs. 500	500

Note – Government may, by notification modify the above list and criteria as and when necessary

Rs 100 million = US \$ 20 million (@ US 1 = Rs 50/-)

Single Window Framework

Besides, Industrial Policy Resolution 2007 -

- Single Window mechanism put in place for:
 - faster & one point clearances; &
 - single point dissemination of industry related information
- (Orissa Industries (Facilitation) Act, 2004 & Orissa Industries (Facilitation) Rules, 2005 are operational;
- Combined Application Form (CAF) replaces 18 forms
- Constitution of Clearance Authorities:

Authority	Project cost limit
High Level Clearance Authority (HLCA)	Rs. 1000 crore or more
State Level Single Window Clearance Authority (SLSWCA)	Rs. 50 crore or more but less than Rs. 1000 crore
District Level Single Window Clearance Authority (DSWCA)	Less than Rs. 50 crore

Institutional Framework for Investments

- Industrial Policy- 2007 operationalized since 2nd March 2007
- It aims at-
 - Broad basing the Industrial Growth;
 - Multiplier Effect of Existing Mega Industry;
 - Further Value Addition
- Orissa is being promoted as an attractive destination for METAL DOWNSTREAM INDUSTRY.
- Provision of
 - Thrust sector,
 - Priority sector and
 - Pioneer Units