



HISTORICAL RESEARCH

Journal of History and Archaeology

International Double-Blind Peer-Reviewed Referred Journal



State Policy and the Making of Industrial Space in Tamil Nadu, 1991–2011

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ARTICLE INFO

Article History

Received	12 Oct, 2025
Revised	30 Nov, 2025
Accepted	25 Dec, 2025
Available Online	30 Dec, 2025

ARTICLE ID

HRJHA0304002

KEYWORDS

State policy, industrial space, economic liberalisation, spatial planning, Tamil Nadu



ABSTRACT

Economic liberalisation after 1991 is often seen as a period when the state stepped back from industrial planning and allowed market forces to shape industrial growth. The experience of Tamil Nadu, however, suggests a different picture. This article examines how state policies continued to influence the location, expansion, and organisation of industrial space in Tamil Nadu between 1991 and 2011. Using industrial policy documents, planning records and institutional sources, it looks at how industrial development was guided through planned land acquisition, industrial estates, infrastructure development and regulatory controls. Industrial growth in areas such as Sriperumbudur, Hosur, and Tiruppur did not happen randomly. These regions developed as industrial centres because of specific policy choices linked to infrastructure, sector priorities, and export orientation. Environmental rules and phased development of industrial estates also played an important role in shaping where industries could locate. At the same time, state planning moved away from earlier goals of spreading industry evenly across regions and began to prioritise competitiveness and investment potential. As a result, industrial growth became concentrated in selected regions.

ISSN: 2583-9764

Vol. 03, No. 04 (Oct-Dec, 2025)

Website: www.hrjha.lexarcheus.com

How to Cite This Article

R. Pandian, S. Swaminathan. "State Policy and the Making of Industrial Space in Tamil Nadu, 1991–2011." *Historical Research: Journal of History and Archaeology*, vol. 3, no. 4, 2025, pp. 20–28.

DOI: <https://doi.org/10.5281/zenodo.19099648>

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INTRODUCTION

The relationship between state policy and industrial space has long occupied a central place in debates on economic development in India. From the mid-twentieth century, industrialisation was closely tied to state-led planning, with governments actively determining the location of industries, allocation of land, and distribution of infrastructure. Tamil Nadu emerged as one of the most industrialised states within this framework, characterised by a dense network of industrial estates, public sector undertakings, and small-scale industrial clusters developed through planned interventions. This historically embedded association between the state and industrial space makes Tamil Nadu a particularly instructive case for examining how spatial planning practices evolved under changing economic regimes.¹

Economic liberalisation began in 1991 which was essential point in the process of development in India. Liberalisation has been taken as a change towards non-state intervention into the market driven growth with the standing of the prevalence of the power of the private capital of industrial location and growth. In this story, agglomeration economies, investor orientation, and global networks of production are often cited as the causes of spatial results. Nevertheless, these interpretations are inclined to the minimisation of the role played by sub-national states in the process of forming industrial geographies, particularly in areas that have a high-planning institution and regulatory potential.² In Tamil Nadu, the post-1991 period witnessed rapid industrial expansion alongside significant spatial transformation. Industrial growth was accompanied by the emergence of new industrial regions, the intensification of existing ones, and the relative stagnation of others. These changes raise important historical questions about continuity and rupture in spatial planning practices. Did liberalisation dismantle earlier planning frameworks, or did it modify them to suit new economic priorities? To what extent did the state continue to influence where industries located, how industrial regions expanded, and how space was organised under a liberalised policy regime?

Existing scholarship on post-liberalisation industrialisation in India has largely concentrated on investment patterns, sectoral restructuring, and macro-economic performance. Early assessments by Montek Singh Ahluwalia examined the shift in industrial growth and productivity following the 1991 reforms, focusing primarily on policy outcomes at the national level.³ Studies published in *Economic and Political Weekly* by scholars such as K. Nagaraj and C.P. Chandrasekhar analysed trends in private investment, industrial slowdown, and the changing structure of manufacturing during the reform period.⁴ Similarly, Jayati Ghosh and Chandrasekhar emphasised the uneven growth trajectories produced by liberalisation, drawing attention to employment stagnation and capital-intensive industrial expansion.⁵ While these works provide crucial insights into the economic consequences of liberalisation, they tend to treat space implicitly, engaging with regions mainly as statistical units rather than as historically produced and state-governed industrial structure.

Tamil Nadu's experience after 1991 offers an opportunity to reassess the nature of state intervention in a liberalised economy through the lens of space. The state did not operate on a blank slate; its post-liberalisation policies were layered upon earlier planning traditions, legal frameworks, and institutional capacities. Understanding how these inherited structures interacted with new policy imperatives is essential for explaining the distinctive spatial patterns of industrial development that emerged during this period.

Research Objectives

The study aims to trace shifts in Tamil Nadu's industrial and spatial planning policies between 1991 and 2011 through official policy documents and planning records, examine the role of state agencies such as SIPCOT in land acquisition and industrial estate development, analyse policy-driven spatial concentration in regions like Sriperumbudur, Hosur, and Tiruppur, and assess continuity and change in state-led industrial planning practices after liberalisation.

Methodology

The study adopts a historical and qualitative methodology, drawing on primary sources such as Tamil Nadu government industrial policy documents, SIPCOT records, planning notes, and archival



materials. These are supplemented by secondary literature and spatial analysis of selected industrial regions to interpret policy shifts, institutional roles, and continuity and change in industrial space after 1991.

FINDINGS AND DISCUSSION

Economic liberalisation in India after 1991 did not result in the retreat of the state from industrial development, as is often assumed in market-centric narratives. In Tamil Nadu, liberalisation reconfigured rather than diminished the role of the state. Industrial policies framed after 1991 reveal a deliberate attempt by the state government to actively reorganise industrial space through targeted policy instruments, institutional mechanisms, and spatial planning strategies. The evolution of state industrial policies in Tamil Nadu must therefore be examined not merely as regulatory adjustments but as interventions that reshaped the geography of production and accumulation.⁶

The Industrial Policy Statement of 1992 marked a clear departure from earlier import-substitution priorities, placing emphasis on export-oriented growth, private investment, and infrastructure-led industrialisation. Yet, instead of allowing market forces alone to determine industrial location, the Tamil Nadu state positioned itself as a facilitator of spatial concentration by identifying growth corridors, industrial estates, and sector-specific zones. Policy documents from the 1990s consistently stressed the need for “planned industrial development”, signalling continuity with earlier state-led planning traditions even within a liberalised framework.⁷ A key feature of post-1991 policy evolution was the prioritisation of industrial infrastructure as a spatial strategy. The state invested heavily in transport connectivity, power supply, and industrial estates to attract domestic and foreign capital. The expansion of highways connecting Chennai with Hosur, Vellore, and Coimbatore was not incidental; it was integral to the spatial logic embedded in industrial policy.⁸ These infrastructural investments enabled the emergence of linear industrial corridors rather than dispersed industrial growth, reinforcing spatial concentration in select regions.

Policymaking institutional mechanisms were decisive in transforming policy into space. Industrial development state agencies were given the mandate to acquire land, develop industrial estates and offer plug and play infrastructure to investors. The acquisition of the land under the supervision of the state authorities guaranteed that the area of industries was not generated randomly but under a strict control and zoning. It was also an indicator of a change in the form of intervention of the state: the direct ownership of the production units was replaced by the ability to control the conditions of production by means of the spatial planning.⁹

The automobile-led industrialisation of the Chennai–Sriperumbudur belt offers a concrete example of how policy shaped industrial space. Policy incentives in the late 1990s and early 2000s targeted capital-intensive manufacturing, supported by large-scale land acquisition and infrastructure provisioning. The clustering of automobile and auto-component units in this region was the outcome of deliberate spatial planning rather than spontaneous agglomeration. State policies ensured proximity to ports, highways, and urban labour markets, thereby embedding industrial growth within a carefully structured spatial framework.¹⁰ Correspondingly, Hosur became an industrial belt of Chennai-Bengaluru axis as a result of spatial integration through policies. Industrial policies that were post-liberalisation promoted connectivity across regions and Hosur could operate as a manufacturing hub that had the advantage of both the industrial policies of Tamil Nadu and the metropolis market of Karnataka. This cross-border geographical mobility highlights the level of proactivity of the state policy in recreating the industrial geography instead of reacting to the impulse of the market.

The policy development also reflects sector-specific strategies with regard to space. Export-oriented policy frameworks incorporated textile and garment industries in other regions like Tiruppur into the global production networks.¹¹ Although the industrial base in Tiruppur existed even before liberalisation, the policies of the post-1991 era enhanced the spatial concentration scheme of the city by encouraging exports incentives, development of infrastructure and providing institutional facilities. The intervention of the state in this case was not to develop a new industrial region but to re-engineer an existing one to fit the global market requirements, on the principles of specialisation of space. The further evidence of how industrial policy formed space is the introduction of environmental and land-



use regulations, which occurred after the 2000s.¹² The industrial activities were segregated spatially as industries were increasingly categorized depending on their polluting capacity. The contaminating industries were either moved or limited to industrial estates and the cities and city-fringe were left to the less risky industries. This regulatory spatialisation highlights the fact that the state remains significant to the regulation of industrial geography during times of liberalisation.

The changes that transpired in the industrial policy in Tamil Nadu since 1991 represent progress in terms of continuity and change. Although policy language used liberal economic idioms like competitiveness, investment climate and global integration, space logic was stuck to the state planning. High focus on industrial estates, growth centres and regional specialisation is reminiscent of pre-liberalisation planning frameworks, albeit remodelled in accordance with new economic priorities. The fact that liberalisation decreased the state role cannot stand when considered through the industrial space in Tamil Nadu. To the contrary, the state became a spatial planner, directing capital to chosen areas, controlling land and infrastructure, and controlling where industry would settle. The space of industrial post-1991 was not the by-product of market efficiency itself but the consequence of long-term state intervention of liberalised economic institutions.¹³

The phase of economic liberalisation in India commencing in 1991 is commonly understood as a phase that was characterised by the state dropping off the industrialization and spatial planning. The interpretations made in this way stand scrutiny when they are analyzed using the experience of Tamil Nadu. State institutions and planning tools were still used in the decades after liberalisation to concentrate on the location, growth, and structure of industrial estates. Instead of withdrawing, the state refined its role and changed it to direct production to space governance, land regulation, and infrastructural coordination. The industrial estates that have developed in this time were not some accidental agglomerations that developed due to market logic only, they were historically produced spaces that were created with purposeful institutional planning.¹⁴

Industrial Estate Development

The institutional structure that was in place in the industrial estates in post 1991 Tamil Nadu was characterized by consolidation and improved coordination. The State Industries Promotion Corporation of Tamil Nadu (SIPCOT) that was the main land-holding and estate-developing institution was the most influential force in this process. Liberalisation has made it increase its mandate, particularly with regard to large scale manufacturing and export oriented industries. The power of SIPCOT to purchase land, provide industrial estates and allocations with ready-made infrastructure placed it as spatial planner as opposed to being a promotion agency.¹⁵

The other state institutions were complementary. The industrial policy was implemented by the Directorate of Industries and Commerce (in particular regarding small and medium enterprises) and the environment zoning and consent mechanisms were used to influence industrial location by the Tamil Nadu Pollution Control Board (TNPCB). The highways, ports and power infrastructure departments made sure that the industrial estates were incorporated into broader connectivity systems. Such an institutional structure saw to it that industrial estates were manufactured under the inter-departmental planning and not in an isolated administrative decision.

Table 1: Key State Institutions and Their Spatial Functions after 1991

Institution	Core Post-1991 Role	Spatial Impact
SIPCOT	Land acquisition, estate development	Determined location and scale of estates
Directorate of Industries and Commerce	Policy coordination	Influenced MSME spatial distribution
TNPCB	Environmental regulation	Zoning and segregation of industries
Highways & Ports Departments	Infrastructure planning	Corridor-based industrial clustering
District Administration	Local land mediation	Facilitated estate expansion



This institutional setup does not support the view that planning was undermined by liberalisation. Rather the planning was incorporated into institutional practices and space decision-making. The position of industrial estates post 1991 was based on an evident planning logic. The state agencies focused on sites in key transport routes and areas close to the labour markets in cities. Chennai-Bengaluru, Chennai-Trichy and Coimbatore-Erode corridors became the corridors of preference in the development of industrial estates. This spatial concentration did not just arise out of investor preference but rather was a product of state planning that co-ordinated land supply, transport accessibility and policy stimulation. The interventions that were the most intensive were experienced in Northern Tamil Nadu.¹⁶ Industrial estates at Sriperumbudur, Oragadam, Irungattukottai, and Gummidipoondi were developed in proximity to Chennai’s port infrastructure and international airport. Policy documents from the late 1990s and early 2000s reveal that the state consciously targeted automobile, electronics, and heavy engineering industries for this region, treating space as a strategic resource rather than a neutral backdrop.

Table 2: Industrial Corridors and Major Estates after Liberalisation

Corridor	Major Industrial Estates	Dominant Sectors
Chennai–Bengaluru	Sriperumbudur, Oragadam	Automobiles, electronics
Chennai–Trichy	Perambalur, Ariyalur	Engineering, cement
Coimbatore–Erode	Existing SIDCO/SIPCOT estates	Textiles, machine tools
Hosur Region	SIPCOT Hosur	Engineering, electronics

A different situation is observed in Western Tamil Nadu. In this case, the state was concerned with refurbishing existing estates as opposed to coming up with huge greenfields. This is sensitive to local industrial background, particularly the preeminence of the small and medium industries in Coimbatore, Tiruppur and Erode. The growth of industrial estates in Tamil Nadu since 1991 was hardly informal and unplanned. Rather, the development of estates was carried out in phases, and the state could control the rate of industrialisation and development of infrastructure. This planning process was used to ensure that land development, power supply, accessibility of roads, and environmental clearances were done before the industrial occupation.¹⁷

Sriperumbudur represents such an attitude. The estate was first planned in the mid-1990s, and it grew in several stages in accordance with the automobile investment cycles. Every stage was characterised by new land purchase, new plan of layout and new standard of infrastructure. This gradualism gave the states an enhanced leverage regarding where they should locate their industries since companies interested in doing so relied on the availability of serviced plots that were under the state institutions.

Table 3: Phased Expansion of Selected Industrial Estates

Estate	Initial Development	Expansion Phases	Sectoral Focus
Sriperumbudur	Mid-1990s	Multiple phases till 2010s	Automobiles
Oragadam	Early 2000s	Continuous	Manufacturing, logistics
Hosur	Late 1990s	Phased extension	Engineering
Gummidipoondi	Pre-1991 base	Post-2000 expansion	Chemicals

The significance of planning in the liberalisation also comes out in the phased expansion model. Expansion was done within state-delimited spatial and regulatory systems, as opposed to speculative industrial growth. Standardised planning templates that state agencies produced influenced the internal organisation of industrial estates after 1991. Estate was not just a mere aggregation of factory plots, but a spatially structured space that was controlled by zoning laws, infrastructure designs and environmental standards. The estate was designed with wide arterial roads, utility segregation, shared effluent treatment facilities, and vendors parks.¹⁸



The principle of the environmental regulation became one of the organising principles. The industries were classified based on the level of pollution and this resulted in spatial segregations within estates and regions. The polluting units were restricted to particular areas where they were treated in common facilities whereas, the non-polluting and knowledge based industries were brought closer to the urban centres. This regulatory spatialisation shows how the planning mechanisms introduced the environmental policy into physical space.

Table 4: Planning Mechanisms Shaping Estate Organisation

Mechanism	Spatial Outcome	Planning Objective
Pollution-based zoning	Segregated industrial areas	Environmental control
Common infrastructure	Shared utilities	Cost efficiency
Vendor parks	Clustered ancillaries	Supply-chain integration
Setback and buffer norms	Controlled land use	Safety and regulation

The organisation of estates also addressed labour mobility. Transport access, internal roads, and nearby residential zones were considered in planning, reflecting recognition that industrial space depended on the reproduction of labour as much as on capital investment.

State Mediation between Global Capital and Local Space

Industrial estates that were set up after 1991 also served as the mediating spaces between the global capital and the local land regimes. Foreign direct investment was proactively invested into state developed estates, or where land tenurability, regulatory clearance and quality of infrastructure could be predicted. By locating the global firms in planned estates the state minimized the risk of the investor and retained the control over the land use and the industrial activity. And this mediation was not conflict free. Industrial estates purchased land on industrial estates like Kanchipuram and Tiruvallur creating opposition among the agrarian communities. However, these oppositions themselves emphasize the primality of state institutions since the results were determined not just by market dealings but by the means of legislation, remuneration and regulatory negotiation.¹⁹

The experience of Tamil Nadu contradicts the duality of liberalisation and state planning. The industrial estates since 1991 were not the spontaneous products of the market or the legacies of a dirigiste past. They were products of a realigned state policy which employed planning engines to plan space according to liberal economic interests. The decisions on location were guided by the plans on corridors; the development was step-by-step; zoning and normative regulations regulated the organisation. Tamil Nadu industrial space was thus historically institutionally created. The state never gave up on the governance of space but re-exerted it in new forms appropriate in a liberalised economy. The interpretation of post-1991 industrialisation would only make sense in terms of industrial estate as designed spaces, which are influenced by state institutions, and not as the neutral containers of individual investment.

The industrial policies in Tamil Nadu since 1991 did not merely multiply the industrial activity but restructured the space hierarchy of the industrial regions in the state. Changes in land use, the concentration of investment within a region, the pattern of employment and the allocation of infrastructure are all measurable changes in this reorganisation. The post-liberalisation policy started to focus on spatial concentration, functional specialisation and proximity to urban and infrastructural node compared to the pre-1991 model, which had focused on the territorial dispersal of industry to create balanced regional development. These transformations did not occur as some by-products of market forces, but were expressed, justified and enforced in the discourse of state policy and in practice of planning.²⁰

The Industrial Policy Statement of 1992 clearly signalled this shift in spatial thinking. Rather than abandoning planning, the policy reaffirmed it by stating that the government would promote “planned industrial growth through the development of industrial estates and infrastructure in identified locations”.²¹ The emphasis on *identified locations* marked a departure from earlier dispersal-oriented



planning and reflected an emerging preference for selective spatial investment. Subsequent policy notes of the Industries Department reinforced this approach by linking industrial growth to infrastructure readiness and locational advantage rather than district-wise distribution.²²

This policy orientation was repeatedly echoed in political discourse during the late 1990s and early 2000s. Budget speeches of the period, as reported in *The Hindu*, stressed the need to make Tamil Nadu “globally competitive” by concentrating industrial development in regions supported by highways, ports, and power infrastructure. Presenting the Tamil Nadu Budget in 2001, Chief Minister J. Jayalalithaa stated that “*industrial development must be supported by world-class infrastructure and properly planned industrial locations to make Tamil Nadu globally competitive*” (*The Hindu*, 23 March 2001). Reporting on the state budget, *The Hindu* further noted that industrial growth was increasingly tied to “world-class infrastructure and planned industrial locations” rather than broad regional spread.²³ Such statements reflect an explicit ideological shift in state planning, where competitiveness replaced regional equity as the dominant objective.

The spatial consequences of this shift are evident in the concentration of large and medium industrial investments in a limited number of districts during the post-liberalisation period. Newspaper coverage of major investment announcements during the early 2000s consistently highlighted northern Tamil Nadu as the preferred destination for new industrial projects. Reports in *The Hindu Business Line* frequently described the region as emerging as the “industrial backbone” of the state, supported by policy incentives and infrastructure development (*Business Line*, early 2000s).²⁴ This represented a marked contrast with earlier decades, when industrial estates were more evenly distributed across districts to stimulate backward regions.

Large-scale conversion of agricultural land into industrial use further illustrates the restructured spatial logic. Newspaper investigations and district-level reports during the late 1990s documented extensive land acquisition in peri-urban and semi-rural areas surrounding major urban centres. *The Hindu* repeatedly reported on farmer protests and compensation negotiations in districts experiencing rapid industrial expansion, underscoring that land conversion was both spatially selective and policy-driven. These conversions were not evenly spread across the state; areas closer to metropolitan centres experienced far higher rates of transformation than interior districts, revealing a clear spatial bias towards regions considered economically strategic.²⁵

Employment patterns also reflect this reconfiguration. While total industrial employment in Tamil Nadu increased after liberalisation, press reports and government data indicate that employment growth lagged behind investment growth in capital-intensive regions. *The Hindu Business Line* observed that high-value industrial projects were generating fewer jobs relative to investment size, reflecting a policy shift towards capital-intensive and export-oriented manufacturing.²⁶ Labour-intensive regions, despite employing large workforces, experienced slower spatial expansion, reinforcing regional inequality in industrial development.

These patterns of infrastructure investments as reported in the press further affirm the selective character of the spatial planning of post 1991. Highway projects, power generation capacity and logistics infrastructure were always covered on few industrial growth zones. The districts that were not part of these zones were relatively under-attended, which influenced their capacities to generate new industrial investments. These asymmetrical distributions of infrastructure gave greater powers to spatial concentration and intensifying the formation of core industrial areas. Notably, the discussion of politics became more and more inured to such unequal results. The commentary of newspapers and policy interviews in the 2000s show that a greater tolerance of regional inequality as an inevitable onslaught of growth-oriented planning has developed. Instead of defining disparity as a failure to plan, the state representatives depicted selective spatial investment as a requirement to stay competitive in industry in a liberalised economy. This represented an obvious ideological shift in previous planning discourses focusing on the balance of territories.²⁷

Simultaneously, the continuity in planning practice was still present. Although it was liberalised, the state still exercised control on land conversion, zoning of industries and development based on estates. Planned estates and approved zones were still used to regulate the location of industry,



instead of allowing it to be uncontrollably chosen by the market as reported in SIPCOT policy notes and the press. This liberalisation therefore redefined the goals of spatial planning, despite the absence of destroying the institutional basis of spatial planning. The spatial restructuring of the industrial regions in the state of Tamil Nadu that took place after 1991 is historically a shift in approach to distributive planning to selective spatial governance. Industrial regions lost their role as they were used more as a tool in generating regional equality and became instead strategic points in the competitive economies networks. It was not spontaneous or market-led transformation but a transformation that was expressed in policy papers, supported in political rhetoric, and covered regularly in the current press. The state never left spatial planning but refocused its priorities, generating a differentiated industrial geography consistent with the liberal economic requirements.

CONCLUSION

Liberalisation of the economy since 1991 changed how industrial development was regulated in Tamil Nadu, yet it did not undermine the influence of the state in the process of forming industrial space. The industrial policies at this time still depended on planned land acquisition, estate-based development, and a regulatory control over the location of industries. The change was in the goals of planning but not its rejection. The intervention of the state shifted more towards the management of the spatial conditions of operation of capital, whether private or foreign. The industrialization in the areas like Sriperumbudur, Hosur and Tiruppur was based on well laid spatial plans which were backed by infrastructural development, gradual development of industrial estates and sector-oriented policy incentives. The agglomeration of automobile, engineering and export-oriented textile industries to certain areas was a form of policy decisions and not a natural market agglomeration. Environmental policies further organized industrial geography by keeping polluting industries away both in urban and residential zones as well as making industrial growth planned. Meanwhile, the priorities on the planning passed by the regional balance to competitiveness and connectivity. The imbalance of the spatial outcomes became more acceptable as immigrants to growth-oriented thinking of policies, which led to the formation of strong industrial cores and rather peripheral territories. The post 1991 Tamil Nadu industrial space was thus not market-based or even the direct result of inheriting the previous regimes of planning, but rather generated as a redesigned version of the state-controlled spatial governance in an economic environment that had been liberated.

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