COMPETITIVENESS OF INDIA INC

INDIA MATTERS

#cii4india

Annual Report 2019-20
As CII was gearing up to celebrate its 125th year in 2020, the world faced the Coronavirus pandemic which upended the lives of people and business operations everywhere. Following the shutdown of economic activities to prevent the spread of the pandemic, global agencies predicted worldwide recession for 2020, with a meagre growth of 1.9% for India. The nationwide lockdown had significant ramifications for the economy, livelihoods and businesses, and is expected to transform business models.

I am indeed proud of how CII rose to the occasion and unfurled numerous initiatives to assist Indian industry and society in dealing with this massive crisis across the country. Even while confined to working from home, CII continuously engaged with the government, providing the industry inputs on mitigating the impact of COVID-19 and addressing issues faced by enterprises. A Code was drafted to urge the industry to be compassionate while addressing the fallout of the crisis and a relief fund was instituted.

CII also brought together industry and partners for manufacturing and sourcing of critical care items during the health emergency. Most of all, we provided relief and assistance to needy sections of society suffering from the impact of the necessary lockdown.

At the beginning of the year, an actionable plan on reviving the Indian economy was prepared by CII and many recommendations aimed at boosting the investment momentum, consumption demand and exports were suggested to the new government, formed after general elections. With the theme for 2019-20 as ‘Competitiveness of India Inc - India@75: Forging Ahead’, CII focussed on the priority areas of economy, employment generation, rural-urban connect, energy security, environmental sustainability and governance.

The introduction of a series of facilitative reforms was encouraging. It was satisfying to note that CII recommendations found place in policy announcements, including reduction in corporate tax rates, regulatory measures, credit availability for key sectors and many others. CII also compiled an exhaustive list of business legislations, where criminal liability could be changed to civil penalty and suggested measures for decriminalization of economic offences.

On sustainable development, CII’s engagement has truly reached a new peak. CII launched the Unplastic Collective, a voluntary, multi-stakeholder platform, co-partnered with UNEP and WWF India. This year, CII events all over the country
became single-use plastic free. The Crop Residue Management Initiative expanded to 102 villages in northern India covering over 1 lakh acres of farmland. Renewable energy, energy efficiency and clean coal were some of the other issues that we worked on during the year.

CII redrafted the guidelines of corporate governance in line with the changing business and regulatory environment. Since 1998, CII has taken a lead in encouraging ethical and moral governance of business in letter and in spirit. While CII members are at the forefront of corporate governance, I urge all to contribute to strengthen corporate governance norms across industry.

Our international missions and engagements during the year maintained a high pace. The Royal Couple of The Netherlands inaugurated the Tech Summit, and other engagements included the Royal Couple of Sweden, President Macron of France, Prime Minister Sheikh Hasina of Bangladesh, and many ministers. CII opened the 11th international office in Jakarta, a part of our Market Facilitation Service (MFS) to enable companies to set up offices in select emerging markets.

CII’s work in relief and rehabilitation intensified considerably during the COVID-19 pandemic. In association with other organizations, the CII Foundation reached out to vulnerable sections of society including daily wage labourers, nomadic tribes, disabled persons, and others. By leveraging the efforts of industry, the Foundation supported community kitchens to provide lakhs of cooked meal packets, dry rations, hygiene kits, and daily essential items to distressed people across the country.

CII’s response to COVID-19 demonstrated how far we have come as an organization over the last 125 years, starting with 5 engineering companies in 1895. It really highlights CII’s partnership with the nation, creating economic growth and social development opportunities and contributing during times of crisis. The past one year reflected CII’s importance as a national development organization. The post-COVID-19 world will demand much more from us, but I am confident that CII will deliver as we have done for 125 years.

I thank Uday and Naren as well as all the regional chairpersons and the chairs of various councils and committees for their guidance and support during the year. I thank all office-bearers for their contribution in making the last one year highly productive. I look forward to the continued engagement of members and wish you all the best in your endeavours.
This year, the world faced the huge challenge of containing the outbreak of the Coronavirus. With almost all countries affected, several million people were infected and number of fatalities continued to rise inexorably. Billions of people were impacted, as countries shut down to prevent the spread of the pandemic and all economic activity, including world trade halted in its tracks. With India’s GDP expected to fall to less than 5% for 2019-20, concerted reform efforts were undertaken, and CII maintained a high pace of engagement with the government. CII submitted numerous recommendations to support industry at a time when cash flows were badly hit by the lockdown. Key sectors of the economy such as aviation, tourism, exports and construction, amongst others, were included in the inputs provided. In particular, we stressed dire consequences that the MSME sector was likely to face and thus called for support through fiscal and monetary measures. The COVID-19 crisis demonstrated the extent of the economy’s dependence on migrant labour and the need to meet their expectations. CII suggested direct benefit transfer to vulnerable sections of society, while requesting for enhanced credit support through banks for enterprises.

Issues relating to lockdown and movement of essential items, collated through the CII network, were taken up with state governments and district administrations. This helped many enterprises resume operations. CII also submitted a detailed plan for exit from the lockdown, depending on health conditions and spread of the contagion. We now have to see how the world economy pans out after this crisis situation. The IMF has forecast negative rate of 3% for the world economy, with most large economies expected to contract significantly.

During the year, as a new government assumed charge, CII submitted a detailed representation on rationalization of many different laws. To take the Insolvency and Bankruptcy Code further, CII shared suggestions with the government on Cross Border Insolvency as well as Group Insolvency. CII’s inputs on separating the roles of the non-executive Chairman and Managing Director and their relationship were well received.

Given the criticality of judicial reforms for India’s progress, CII constituted the National Committee on Judicial Reforms to deliberate on aligning the roles and functions of the executive, legislature and judiciary for effective governance and to undertake policy advocacy on judicial reforms.
On the agriculture front, CII continued to make recommendations on opening up markets and strengthening farmer producer organizations. Linkages with the food processing sector were also highlighted. It is critical to have the cooperation of state governments in agricultural reforms and these were taken up by our regional and state offices.

In manufacturing, CII worked on a sectoral roadmap through roundtables including industry and government representatives on identified sectors. Detailed recommendations were made on export potential and overarching issues such as government procurement, delayed payments, and cost of doing business were continuously taken up.

To resolve the troubles of the NBFC and Housing Finance Companies, CII suggested a range of steps, many of which were actioned by the government. The issue of delayed payments in the infrastructure and other sectors was continuously highlighted and CII suggested setting up a portal identifying such payments. In the power sector, CII pursued three key areas of concern during the year - transmission, DISCOMs and fuel linkage.

The CII Centres of Excellence provided outstanding services to industry and have scaled up their work with communities as well. It is a matter of pride to note their widening expanse of pioneering work in their respective areas, as well as a continuous engagement in new initiatives. Equally, the CII Foundation emerged as a catalytic force in social development, especially in the healthcare emergency of COVID-19. Much of the CII work is undertaken through its regional, state and zonal offices that have built strong outreach at the grassroots and I commend their proactive engagement.

As we prepare to deal with the economic consequences of the terrible COVID-19 pandemic, particularly to get impacted livelihoods back on track, I look forward to the support of each and every CII member. As we commemorate 125 years of this illustrious institution, we must recognize that our commitment extends far beyond business and CII’s role is critical in building an environment of trust between different stakeholders in national development.
In 2019-20, CII continued to play the important role of pursuing and resolving industry’s challenges through regional, state and zonal councils, sub-committees, task forces and working groups in all the 68 offices across India. Throughout the year, initiatives and campaigns were launched across India and various platforms were created for ease of doing business, creating a facilitative and collaborative environment for promotion of investment, stakeholder engagement and capacity building, innovation and sustainable development, amongst others.

The CII Centres of Excellence consolidated their work and branched out in new directions. This year, CII Institute of Quality, which celebrated 25 years of Business Excellence movement and 18 years of building a quality movement in India, promoted TPM in technical education and trained young entrepreneurs.

Pursuing the objective of strengthening the MSMEs’ contribution to the country’s economy, the CII Centre of Excellence for Competitiveness for SMEs has trained over 3,100 companies in its cluster format, recording significant savings.

India has a huge water problem and during the year, CII Water Institute’s comprehensive water audit across sectors guided industry in ascertaining options for reducing water usage. The water management strategy implemented in Aurangabad, proved the efficacy of WATSCAN and the project is now being scaled to another 20 villages.

The CII-ITC Centre of Excellence for Sustainable Development forged tangible improvement in ambient air quality, apart from other activities in clean air. The Green Building Centre achieved a record 7 billion square feet of registered green building space, placing India among the top three in the world. This year, CII Food and Agriculture Centre of Excellence (FACE) launched several initiatives aimed at increasing farmers’ income and enhancing nutrition.

The Institute of Logistics has emerged as a key destination for training programmes in logistics as well as policy advocacy and data. To develop leadership, the Kolkata-based CoE For Leadership interacted with global thought-leaders on transformation. The CII Naoroji Godrej Centre of Manufacturing Excellence has developed an enviable pool of engineer-manager leaders, capable of thinking innovatively for growth.
Promotion of entrepreneurship with a sharp focus on emerging job roles has become a critical issue. CII impacts over 1 million youth annually through its skill development and livelihood initiatives. It is indeed noteworthy that this year, CII made key progress in its target of setting up 125 Model Career Centres.

CII Associations’ Council (ASCON) is an important forum that brings together 108 national level sectoral associations on a common platform. During the year, ASCON regularly reviewed industry performance and deliberated on challenges impacting growth. The flagship ASCON Summit captured the force of these affiliated associations that include over 3 lakh members.

Every year, CII hosts a range of events, conferences and exhibitions to extend knowledge sharing and showcase products. With over 1.25 million industry members attending CII trade shows, business development and networking are intensifying. A proud occasion was the celebration of the 10th edition of EXCON for the construction equipment industry which has now become a global trade fair.

During 2019-20, a slew of existing and new services continued to be offered to members. These included mentorship programmes, directory of members, redemption of reward points, a booklet on membership services, B2B meetings and webinars. Our publications and videos and the information services provided through MyCII are certainly next level.

It is encouraging to note the community engagement that members have built through the regional, state and zonal offices, which is truly implementing CII’s vision of being an institution for inclusive development. It was a pleasure for me to interact with members throughout the country and share their insights and ideas.

I thank all industry colleagues who contributed their thoughts and ideas to CII’s activities. I hope that our continued policy advocacy and stakeholder engagement efforts bring about positive developments for all industry as we tackle the aftermath of the COVID-19 pandemic and its impact on India and the world.
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The Novel Coronavirus (or COVID-19) pandemic caused a far reaching impact on individual lives, businesses, and economies across nations. Government of India worked relentlessly to contain the COVID-19 outbreak, despite the many unforeseen challenges. CII proactively engaged with the central government and state governments across the country in its fight against the disease.

**ADVOCACY**

A series of meetings were held with government officials to suggest policy measures to fight the pandemic. CII announced the COVID Code, a voluntary Code based on fundamental principles of humanity, advising companies not to retrench workers while considering a pay cut for top leadership. CII also shared its COVID-19 relief and rehabilitation initiatives at various meetings with the Government. Eight task forces were formed to drive the relief work and to examine policy suggestions made by members. Some policy recommendations made by CII included:

- 2-3% relaxation of fiscal deficit target for 2 years
- Ease of doing business is of special importance for transport and supply of essential items and for exports. Issues such as e-way bills, fixed electricity charges, and quick processes for clearances were taken up with respective departments and state governments
- Detailed recommendations were made to the Ministry of Corporate Affairs, RBI and other regulatory authorities with respect to relaxation of issuance of circulars without board meetings, appointment of directors, meetings through video conferencing and relaxation for filing of various forms
- Interventions sought for MSMEs included extra credit and support for payment of wages as well as request for government enterprises to release delayed payments to them expeditiously
- Detailed notes were submitted to the concerned ministries on specific issues related to pharma, medtech, healthcare, financial sector, automotive, steel, construction equipment, food processing, agriculture, tourism, aviation, shipping and renewable energy, amongst others
- Exit from lockdown in a spatial and sectoral manner as per spread of COVID-19 was suggested in detail
- Following relaxations in economic activity, suggestions were made for ensuring smooth functioning of business and support for enterprises.

CII’s policy recommendations accepted by the government, RBI and other regulatory bodies included suggestions on making money available in the hands of people, extending moratorium on loans, pushing the deadlines for compliances, considering COVID related contributions under CSR, and inclusion of items under essential goods.

**ACTION**

CII functioned as a hub collating and processing information on pain and disruption, and discussing these with relevant authorities for resolution. The website www.ciicovid19update.in was set up to share policy recommendations, government notifications and advisories, best practices adopted by member companies, and details on suppliers and buyers of critical care products. The website also collated relief and rehabilitation work undertaken by CII.

Efforts were made to bring the industry together for manufacturing of healthcare products for the emergency health situation. A consortium of national laboratories such as DRDO, ISRO, CSIR, and IITs and
large manufacturing companies from the automotive, defense/aerospace sectors was created to develop prototypes of ventilators with transfer of technology.

CII’s state and zonal offices coordinated relief efforts on a large scale to reach essential items to those in need, facilitate movement of goods, and resolve specific issues. These offices, along with CII Foundation, SIAM, ACMA and the Young Indians chapters, rolled out community interventions. The COVID-19 Relief and Rehabilitation Fund was set up to pool industry funds to address the pandemic.
CII continuously interacted with Central Government including ministers, secretaries and other officials on a range of issues arising out of the lockdown. These brought together inputs from industry members related to extending timelines for regulatory compliances, shifting physical documentation online, deferring payments of various kinds, and others. Request for classification of necessary goods as essential items, smooth movement of transport, obtaining permits and passes, and coordination among various Government departments and State Governments continued alongside. The Government accepted many of CII’s suggestions fully and others partially.

### KEY CII SUGGESTIONS ACCEPTED BY THE GOVERNMENT

- **Exit from lockdown needs to be calibrated with priority being given to restarting economic activities.**
- **All permissions given for phase 1 of lockdown should remain valid for the next phases.**
- **Criminal liability of employers in case of COVID-19 positive case of employees must be removed.**
- **All economic activities in Green and Orange zones and activities in non-containment areas of Red zones may be started.**
- **Delivery of cooked food items from restaurants should be included in essential items list.**
- **IT and ITeS sectors need not be stipulated at 50% strength, but can be carried out with appropriate social distancing.**
- **Permission for stationery stores to be opened was requested.**
- **Food processing industries were partially opened up in urban areas as well as rural areas.**
- **Drivers should be permitted to operate vehicles for employees in phase 3.**
- **Smooth road freight movement to be ensured across states through better coordination between local administrations and central government.**
- **Permission should be given for dhabas, repair shops and roadside facilities to open in phase 2 of lockdown.**
- **Automatic extension of e-waybills needs to be granted.**

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**All companies with turnover of less than INR 5 crore may be permitted to file quarterly GSTR1/3B forms.**

**Banks and NBFCs should defer all term liabilities without levy of penal interest for at least 6 months. A 3 months moratorium for repayment of term loans was granted.**

**Waiver of customs duties on critical care equipment was sought.**

**Customs authorities should function 24x7 with adequate staff.**

**Transport services in ports must be declared as essential services to enable shipping, CFS, and freight forwarders to resume operations at all ports and airports.**

**Removal of demurrage charges at ports and airports was urged.**

**For certain types of consignments, CBIC should allow importers to submit an undertaking, instead of asking for bonds.**

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**CII is working across 28 STATES**
CII released several policy papers, reports and survey outcomes in response to the impact of the lockdown on the economy. The publications put forward recommendations on planned exit from the lockdown, economic recovery and sectoral actions. These were advocated to Prime Minister’s Office, key Ministers and Secretaries besides NITI Aayog.

- De-stressing the Indian Economy - Economic Stimulus Needed Urgently
- Series on COVID-19: Impact on Economy and Industry: Actions Needed to Sustain Continuity
- Guidelines for Industry Working After COVID-19 Lockdown
- A Plan for Economic Recovery
- CII Suggestions on MHA Guidelines of 15 April and Implementation
- Exit from the Lockdown : A CII Strategy
- Towards an Organised, Safe and Sustainable Re-Start of the Economy
- State of the Economy & Coronavirus Impact
- Impact of Lockdown due to COVID-19 Pandemic: CEO Snap Poll
- Resumption of Economic Activity During Lockdown 2: A Survey

Over 54 LAKH were provided food

- 19.80 LAKH COOKED MEALS
- 16.60 LAKH RATION KITS
- 1,685 MT OF FOOD GRAINS

Over 67 LAKH directly benefitted from the initiatives

57.30 LAKH units of hygiene material distributed

This includes

- 22 LAKH MASKS
- 7.6 LAKH GLOVES
- 31,000 PPES
- 27.60 LAKH SANITIZERS/SOAPS

As on 11 May 2020
CELEBRATING 125 YEARS OF SERVICE TO THE NATION
1895
EITA
5 engineering companies come together to form Engineering & Iron Trades Association (EITA) to develop a nascent industry in India.

1912
IEA
EITA is renamed Indian Engineering Association (IEA) to focus on promoting the cause of engineering.

1919
AIEI
IEA gets representation in Purchase Committee appointed by the Government.

1942
EAI
Emergence of Engineering Association of India (EAI) representing small and medium engineering firms.

1974
AIEI EXPANDS
Historic merger of IEA and EAI leads to the creation of Association of Indian Engineering Industry (AIEI).
The largest single industry association in the country represents more than 1,000 companies with an investment of INR 3,000 crore and employing 10 lakh.

1975
IETF
President of India Fakhruddin Ali Ahmed inaugurates the 1st Indian Engineering Trade Fair (IETF).
The biennial flagship event now showcases latest manufacturing products, technologies and services from all over the world.

1977
AIEI EXPANDS
Opens the first overseas office in Saudi Arabia.
Constitutes the Rural Development Committee.
Prime Minister Shri Morarji Desai addresses the annual session.

1979
TOWARDS EUROPE
AIEI opens its first European office in London in association with the Confederation of British Industry.

1980
INTERNATIONAL ENGAGEMENT
Organizes the first ever international meeting on industrial cooperation between West Europe and India.

1982
QUALITY CONSCIOUS
AIEI initiates the quality movement in the country. Sends the first industrial mission to Europe.
CEI is renamed as Confederation of Engineering Industry (CEI) – an apex body for the manufacturing industry.
The first edition of Auto Expo is organized.

The foundation stone of the AIEI headquarters is laid in New Delhi.

CEI

1986

CII becomes the key interlocutor for liberalization and reforms. Its policy advocacy work starts on a new trajectory.

POLICY ADVOCACY

1991

Launches Indo-British Partnership Initiative (IBPI).

1993

CII

1992

CEI sets up the Total Quality Management (TQM) division to promote quality in Indian manufacturing.

1988

IBPI

1995

Former Prime Minister Shri Inder Kumar Gujral lays the foundation stone of the CII Naoroji Godrej Centre of Manufacturing Excellence (CME).

1997

CME

1998

DEVELOPMENT WORK
First ever Social Summit is organized.
1500 members initiate workplace programme on HIV/AIDS.
Core Group formed to compile model policy framework for industry on community development.

1995

The Partnership Summit is initiated to commemorate CII’s centenary year.
Prime Minister of India inaugurates the flagship annual event.

1991

CII

1992

CEI is rechristened Confederation of Indian Industry (CII) with the objective of transforming Indian industry into a highly competitive and globalized destination for investment.
Bhartiya Yuva Shakti Trust (BYST) is set up to help under-served Indian youth.

1998

VISIT TO MOSCOW
AIEI delegation accompanies Prime Minister of India Shri Rajiv Gandhi to Moscow, first industry association to travel during a state visit.

1985

1983

POLICY ADVOCACY

1986

TQM

1988

CEI

1991

IBPI

1993

CII

1992

CEI

1995

CME

1998

DEVELOPMENT WORK

1995

THE CENTENARY YEAR
CII celebrates 100 years of its existence.
The Partnership Summit is initiated to commemorate CII’s centenary year.
Prime Minister of India inaugurates the flagship annual event.

1991

POLICY ADVOCACY

1992

CEI

1995

CME

1998

DEVELOPMENT WORK
First ever Social Summit is organized.
1500 members initiate workplace programme on HIV/AIDS.
Core Group formed to compile model policy framework for industry on community development.
CII delegation accompanies the historic Lahore Bus Journey with the Prime Minister of India to strengthen linkages with Pakistan’s industry. An educational TV show for children Khullam-Khullia is conceptualized.

**WORKING WITH THE GOVERNMENT**

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<tr>
<td>1999</td>
<td>CII delegation accompanies the historic Lahore Bus Journey with the Prime Minister of India to strengthen linkages with Pakistan’s industry. An educational TV show for children Khullam-Khullia is conceptualized.</td>
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<tr>
<td>2000</td>
<td>Launches India Partnership Forum jointly with UNDP. Interventions for disaster relief and rehabilitation undertaken for Gujarat earthquake victims. Indian Business Trust for HIV/AIDS is set up.</td>
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<tr>
<td>2001</td>
<td>Forms Indian Green Building Council (IGBC) to enable a sustainable built environment for all. Organizes the first ever disaster mitigation summit.</td>
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<tr>
<td>2003</td>
<td>Launches award under Woman Exemplar Program (WEP) that focuses on empowering women at the community level.</td>
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<tr>
<td>2005</td>
<td>Launches CII-ITC Centre of Excellence for Sustainable Development (CII-CESD) to catalyze innovative ideas and solutions, both in India and globally, to enable businesses and their stakeholders to create sustainable value. Sets up Affirmative Action Programme to help SC/ST.</td>
</tr>
<tr>
<td>2006</td>
<td>Launches award under Woman Exemplar Program (WEP) that focuses on empowering women at the community level.</td>
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<tr>
<td>2007</td>
<td>Organizes the first national summit on CSR. Sets up National Committee for Industry NGO partnership. Code of Conduct on Affirmative Action was promoted among CII membership.</td>
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<tr>
<td>2008</td>
<td>CODE OF CONDUCT PROMOTED</td>
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<td>2008</td>
<td>Adopts the vision of Prof C K Prahalad and launches India vision document - India@75. Establishes the first Skill Training Centre in Chhindwara to give rural youth employable skills.</td>
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</table>
Social development activities renamed as Development Initiatives.

Initiates CII Suresh Neotia Centre of Excellence for Leadership to serve as a key facilitator for leadership development.

**DEVELOPMENT INITIATIVES**

**2009**
- **CII FOUN...</p>
COMPETITIVENESS OF INDIA INC. 
INDIA@75: FORGING AHEAD

- ECONOMY
- EMPLOYMENT GENERATION
- RURAL-URBAN CONNECT
- ENERGY SECURITY
- ENVIRONMENTAL SUSTAINABILITY
- GOVERNANCE
ECONOMY

India is the third largest economy in terms of purchasing power parity and fifth largest in nominal terms. It is expected to post strong growth and grow by 7.5% in 2019 and expand further by 7.7% by 2022, supported by a stable macroeconomic environment and strong structural reforms. India is now set to become a US$5 trillion economy in the next five years and Indian industry will remain the principal growth engine for achieving this target.

As a key partner in India’s national development, the Confederation of Indian Industry (CII) is committed to promoting the growth of the Indian industry and is dedicated to driving the country’s development across sectors. It helps industry power India’s evolution and empower its citizens by generating incomes and livelihoods.

As India prepares to celebrate its 75th anniversary as an independent nation, several imperatives for the economy gain significance. Taking cognizance of the rapidly changing global landscape, Indian Industry must prepare a growth strategy that will catapult the economy to the next wave of growth.

Jobs and livelihood creation would assume the highest priority, given the rapid evolution of technology and advent of Industry 4.0. More importantly, as agriculture remains the predominant sector, achieving higher productivity in the sector along with establishing the rural-urban connect is a critical objective for the evolving structure of the economy.

Equally, industry and services must receive strong attention in order to fire growth on all cylinders. Competitiveness of Indian Industry must continue to be built up, both through national competitiveness as well as competitiveness of enterprises.

With this backdrop, the focus for Indian industry during 2019-20 will be on five priority areas which would enable the country to stay on a solid growth track. Building on the priorities of the earlier themes, CII in 2019-20 will work on the theme of Competitiveness of India Inc - India@75: Forging Ahead with five sub themes as mentioned below.
EMPLOYMENT GENERATION

Generating more and better livelihoods is central to India’s development trajectory, necessitating new ideas for agriculture, manufacturing, infrastructure and services. While on the one hand, enterprises must be adequately empowered to create jobs, on the other, building the talent of India’s human assets is an imperative.

A strong manufacturing sector underpins the endeavor for creating employment opportunities. Ease of doing business, labour regulations, access to finance, and right sectoral policies would contribute to a conducive ecosystem for growth and job creation. Technology is evolving at a rapid pace with digitization, Artificial Intelligence, Blockchain, 3D Printing, Robotics and Automation, collectively referred to as 4.0. Hence, the focus will be on creating next-gen manufacturing, which will also usher in high productivity in the sector along with creating more jobs. The export endeavor will be emphasized along with promoting labour-intensive sectors.

Employment generation in the agricultural sector is essential to raising incomes of farmers. The right agri-marketing strategies such as electronic national agricultural markets, transforming rural haats into vibrant agri-produce markets and building farmer producer organisations are key for ensuring higher incomes for farmers. Farmers will also be linked with enhanced technology, mechanization, and better seeds and inputs.

In the services sector, employment opportunities across sectors such as healthcare, tourism, entertainment and media, financial services, education and so on bear huge potential. The objective will be to ensure the best conditions for these sectors to expand rapidly.

Infrastructure plays a dual role in both creating jobs in the construction sector and in connecting workers with job opportunities. In this, the digital infrastructure can play a huge role and will be boosted along with transport, communication and energy facilities. Public-private partnerships and financing will be taken up strongly.

The areas of focus would be on planned urbanization and ensuring movement of workers from less productive primary to secondary and tertiary sectors of the economy. Additionally, adequate housing and infrastructure in the right urban areas must be prioritized to enable productivity gains from migration.

The skill development endeavor has now gathered pace and must be accelerated, including by leveraging the industry linkage.

RURAL-URBAN CONNECT

As the main occupation for Indians, the agriculture sector faces a conundrum of rising productivity and falling incomes. Opportunities in key areas such as horticulture, fisheries, poultry, and livestock in an organized manner can add to jobs. A major focus would be food processing, particularly in the rural areas.

Off-Farm employment can be generated in the rural areas by linking urban areas with the agricultural economy. Cold chains, warehousing, and transport connectivities will be taken up.

Agri exports is an area of huge opportunity as India can tap overseas markets and ensuring standards, certification and skill development will be taken up along with state level agri export policies.
ENERGY SECURITY
Energy security and efficient consumption of energy resources is critical for attaining sustainable development. India’s rising import bill is an area of concern and thus the primary focus will be on effectively managing energy use with growth and reducing India’s oil intensity. Other priority areas would be to develop high grade energy infrastructure, such as energy ports, pipelines, refineries, etc. that are well equipped to face climate extremes. Focus on innovation and new technologies in the energy sector is also critical for creating necessary storage facilities. Additionally, access to finance and investments in cost effective technologies is also an essential requirement.

India is committed to strengthen and promote its renewable energy programme and Indian Industry will further this agenda by engaging with relevant stakeholders, prioritizing policy reforms, promoting energy efficiency initiatives and encouraging investments in efficient energy technologies.

ENVIRONMENTAL SUSTAINABILITY
India has taken a conscious lead in combating climate change and meeting the sustainable development goals. However, given the range of environmental problems - from water conservation to waste management - providing solutions for sustainable living and quality of life is critical for achieving continuous growth.

Ensuring an environmentally sustainable future for the country will be a key priority for Indian industry given the rising challenges from a variety of environmental issues and its adverse consequences for a developing nation.

Under its theme of environment sustainability, through its various centres of excellence, CII will be committed to the areas of promoting clean air and electric vehicles, environment conservation and forest protection, and reducing CO2 emissions through green practices and businesses.

GOVERNANCE
Governance will be an overarching theme in all areas of engagement for Indian Industry. Given its all-pervasive nature, corporate governance will remain an all-important role with focus on developing innovative governance practices, setting standards and evolving best practices.

CII has been and will continue to be actively involved in representing industry issues and initiating constructive dialogue among the relevant stakeholders. Emphasis would be on promoting better risk management practices, ensuring transparency and greater stakeholder engagement.

CII is already a forerunner in all the five thematic areas. It will continue to strengthen its support and scale up its activities in all these areas for unleashing the true potential of the Indian economy.
POLICY
ADVOCACY
The last one year has been a year of slowdown, both for the global as well as for the Indian economy. India’s GDP growth declined significantly, both in terms of current and constant prices. The situation was further exacerbated by a global slowdown, with the global economy in 2019 registering its lowest growth rates since the global financial crisis.

In this context, CII engaged extensively with members and the government to identify measures to put the economy back on a higher growth trajectory. Members, eminent economists and trade specialists convened on various platforms, such as the Economy Roundtable, to deliberate on critical topics including the state of economy, employment generation, impact of government reforms on industry and the measures required to spur economic growth.

An actionable plan on reviving the Indian economy was prepared after analyzing the macro-economic factors and trends across key sectors. Many recommendations aimed at boosting the investment momentum (at macro and sectoral levels), consumption demand and exports were taken up by the government when it announced a slew of measures to arrest the downslide.

Consequent to the government’s reiteration of the target of a USD 5 trillion economy by 2024-25, CII undertook an assessment of investments required over the next 5 years and also forecast the contribution of key investments. A survey was undertaken to map the job creation potential and the effectiveness of measures introduced to boost MSME growth. This was the largest ever MSME specific survey covering 105,347 firms of varying sizes, located in about 350 industrial centres and spread across 28 states. Interventions required for energizing the struggling minerals and mining industry, key to ensuring India’s raw material and energy security, were also compiled in a research paper.

There has been heightened public discourse on the need for Central Public Sector Enterprises (CPSEs) in the current business environment. An analytical report on the objectives and thus, need for CPSEs in the current
business environment was prepared. The report lays out a CPSE Filter Framework to determine the need for government participation in a sector. Leveraging learnings from other countries, the report also suggests a Competitiveness Model for transforming CPSEs into efficient and globally competitive entities.

The report titled ‘Agenda for the New Government’, outlined suggestions on fiscal management, employment generation, boosting investments, and ensuring stability on the external front as well as for addressing environmental challenges. Measures to build economic competitiveness through interventions in areas such as taxation, power, education and skill development, innovation and ease of doing business, amongst others have also been outlined in the document.

Findings of the industry survey on the status of GST refunds were shared with the government. Suggestions were made for actions to revive growth, address delayed payments, dealing with challenges of the telecom sector as well as on draft industrial policy, and amendments to the Contracts Act.

As a follow up to her maiden Union Budget, Minister of Finance and Corporate Affairs, Smt Nirmala Sitharaman, addressed industry leaders at the CII-India Today Group Budget Roundtable in New Delhi. During the year, she exchanged views with members on a host of issues impacting the Indian economy. Senior officials from the Department of Economic Affairs and the Department of Investment and Public Asset Management (DIPAM) also engaged with industry members on the Union Budget 2019-20.

In February 2020, following the presentation of the Union Budget 2020-21, The Minister of Finance and Corporate Affairs, accompanied by Revenue Secretary and Secretary, Economic Affairs, interacted with industry leaders at the CII National Council meeting in New Delhi.

To deliberate on contemporary macro-economic challenges facing the Indian economy, a new initiative called the CII India Policy Dialogue series was launched during the year. The maiden session deliberated on the issue of job creation.

Publications

A unique product titled ‘Economy Trends’, a quarterly publication analyzing the interlinkages between broad macro-economic trends and their impact on sectoral performance, was launched during the year. A dashboard, based on 16 high frequency indicators, provides a holistic view of the economy. In addition, the quarterly publication assesses the performance and trends in twelve specific sectors, based on company level analysis. Experts from government, industry and academia continued to share perspectives on domestic and global economic developments in ‘Economy Matters’, a monthly publication. The ‘Ready Reckoner - Key Economic Statistics’ continued to count as the go-to source for succinct updates on the economy.

Periodic Surveys

The Quarterly Business Outlook Survey, a widely read and quoted survey, provided a ground-up view of the prevailing and expected economic conditions. The CEOs Poll tracked the industry’s view on investment and growth trends, based on a number of parameters and highlighted their view on topical issues.
In its first year of formal existence, CII Research produced a number of seminal works. Leveraging the unique industry access, CII Research reports combine practical insights with in-depth analysis using advanced techniques. The objective is to work on real-life issues of critical importance to both the economy and the industry. CII Research originates work based either on specific requests from members or own assessment of vital issues. Discussion papers and study reports undertaken during 2019-20 include:

**India - Maldives Economic Relations: A CII Paper**

This paper offers potential investors an insight into the economies of the Maldives and India, outlines the bilateral economic cooperation and the present investment scenario, and highlights sectors for potential cooperation in the country. SWOT analysis and suggestions for a strategic roadmap for bilateral relations are also included in the paper.

**Indian Exports - The Next Trajectory: Mapping Products and Destination**

Boosting exports is key to achieving higher growth and economic prospects. Given the rapidly changing global trade scenario and limited resources, India needs a targeted export strategy that promotes products with potential and identifies key markets. This paper has developed a product matrix with select Indian exports at the 4-digit HS code level.

**Construction Financing Overseas: China’s Footprint and Ideas for India**

China is investing significantly in India’s immediate neighbourhood. This report specifically examines financing projects undertaken by Sri Lanka, Nepal and Myanmar, while exploring how India could ramp up the financial engagement in these nations through existing mechanisms such as Export Import Bank of India and ECGC, amongst others.

**In Search of Stability: Understanding Global Trade Architecture**

Global trade architecture defines the framework within which international trade takes place. Various experiments have taken place in multilateralism to mitigate the anarchic framework within which international relations and trade are conducted. The report outlines the developments in global trade architecture and its dynamic nature.
Going forward, CII Research will continue to establish itself as a thought leader in areas related to economy and industry. The intent is to present new ideas and innovative yet practical solutions to mitigate critical issues facing India.
The Government of India is working assiduously to improve the country’s business environment. The introduction of a series of facilitative reforms, mandating digitization of procedures, reduction in regulatory compliances, revision of obsolete policies and promotion of e-governance has enthused the country’s business sentiments. This is also reflected in India’s leap of 79 positions in the World Bank’s ease of doing business ranking over the last five years - from 142 in 2015 to 63 (out of 190 economies) in 2020.

The CII Ease of Doing Business Task Force directed its efforts at identifying specific areas for improvement, creating awareness on business reforms and inviting industry feedback for greater effectiveness in delivery of government measures. Even as the country’s business environment improves, CII will continue to work with the government for creation of faster processes, greater transparency, lower transaction costs, enhanced digitization, reduction in discretionary processes and time-bound clearances for the industry.

### ADVOCACY

During the year, CII continued to work with the governments at the central, state and local levels on the following specific areas of intervention:

- Strengthening the online single window system to ensure zero-physical interface for obtaining clearances / approvals with the provision of time-bound approval
- Easing insolvency procedures for corporate, partnership, proprietorship and other firms
- Enabling higher trade facilitation through increased efficiency of reforms
- Improving dispute resolution by promoting the Alternative Dispute Resolution (ADR) mechanism
- Easing environmental compliance for the industry
- Simplifying the land acquisition process through reforms such as digitization and integration of land records at various levels, stamp duty rationalization and easier change of land use, amongst others
- Rationalizing the inspection process for industry by promoting measures such as single joint inspections and self/third party inspections
• Facilitating repealing/amendment/decriminalizing of archaic laws with active involvement of legal experts.

**ACTION**

Amongst the wide range of business reform indicators, work on resolving insolvency and trading across borders was pursued actively by undertaking research, surveys, making representations, organizing conferences and holding regular stakeholder consultations and meetings.

A detailed study on the Development of Insolvency Regulatory Framework in India, undertaken in partnership with the Foreign & Commonwealth Office (FCO), UK, and AZB & Partners, envisioned the development and implementation of a strong cross-border and personal insolvency framework in India. Senior officials from the Ministry of Corporate Affairs addressed issues related to IBC 2016 at the conferences on the subject. Topical issues addressed included the role of the judiciary in evaluating resolution plans approved by the Committee of Creditors (CoC), ensuring smooth adoption of the provisions of RBI’s Prudential Framework for resolution of stressed assets and bringing the Non-Banking Financial Companies (NBFCs) under the Code’s ambit.

Representations for improving the trade environment were submitted to the National Committee on Trade Facilitation (NCTF), chaired by the Cabinet Secretary; Steering Committee of NCTF; and Central Board of Indirect Taxes and Customs (CBIC). These were also addressed through conferences and interactive sessions with stakeholders. Besides creating awareness about business reforms, these forums provided an opportunity to enhance the effectiveness of the reform measures already implemented.

CII supports the Department for Promotion of Industry and Internal Trade’s (DPIIT) efforts towards improving India’s ranking on the World Bank’s Doing Business Report at both the central and state levels. Ground-level feedback from industry is collated and shared with policymakers at regular intervals, highlighting the need for further policy interventions. In this endeavour, the conference on Reviving Investment through Improved Ease of Doing Business was one such platform. Senior government officials interacted with stakeholders on several EoDB related issues, including delayed payments, regulatory compliances, and inspections.

The quarterly publication, titled Ease of Doing Business Watch, helps bridge the information asymmetry on EoDB reforms, besides providing industry feedback on business reforms and sharing perspectives from top policymakers.

With a view to discussing key issues on ease of doing business with the government, CII organized an interactive session with Dr Guruprasad Mohapatra, Secretary, DPIIT and Mr Ravinder, Joint Secretary, DPIIT. Participants, while acknowledging various business reforms introduced by the government, raised a series of regulatory issues, covering a wide range of areas, including single window system, labour regulations, environmental compliances and sectoral issues. The Secretary also launched the CII Dashboard on Ease of Doing Business during the session and extended his support in resolution of the issues covered in the publication.
The world’s largest and India’s first green cricket stadium is Gold Rated by CII’s Indian Green Building Council (IGBC). The CII IGBC has facilitated over 7.2 billion square feet of registered green building footprint, with nearly 5,900 green building projects in India. IGBC helps schools, railway stations, campuses, cities, airports, healthcare, offices and homes to go green. The vision of the Council is to enable a sustainable built environment for all and facilitate India to be one of the global leaders in the sustainable built environment by 2025.
The 10th edition of EXCON held in Bengaluru was spread across 3,00,000 square meters.
Corporate India plays a crucial role in nation building and corporate governance is an integral part of the country’s broader governance. It is often considered a means to measure the quality of a company’s management and effectiveness of its board.

Having pioneered the corporate governance movement in India since 1995, CII continues to work with the Ministry of Corporate Affairs (MCA), Securities and Exchange Board of India (SEBI) and other regulators and policymakers, to contribute to building an effective regulatory framework. This movement is driven by encouraging voluntary adoption of best practices and self-regulation by corporates. Today, companies widely accept that sound principles of governance are a necessary tool for long term development and sustainability.

**ADVOCACY**

Principles of governance, though well etched in the corporate ethos, need constant assertion to ensure that they remain comparable with global standards. Against this background, CII continues to deliberate and disseminate principles of governance, ethics, integrity and transparency, including releasing the CII Guidelines on Integrity and Transparency in Governance and the Responsible Code of Conduct for sustained trust for industry.

**Engagement with MCA**

Decriminalisation of offenses under business and economic legislations, computation and penal provisions on Corporate Social Responsibility (CSR), Employee Stock Ownership Plan (ESOP), issues relating
to independent directors and remuneration of non-executive directors have been long standing issues with the corporate sector. A memorandum detailing the industry expectations on these and other areas of concern such as Investor Education and Protection Fund (IEPF), valuation, significant beneficial ownership, was submitted to the MCA’s Company Law Committee. CII members also interacted with the Minister of Finance and Corporate Affairs and Secretary, Corporate Affairs to share their views.

**Engagement with IBBI**

As a result of the efforts made in partnership with the MCA and Insolvency and Bankruptcy Board of India (IBBI), the Insolvency Law Committee was re-constituted to track the functioning and implementation of IBC. Various proposals were shared with the Committee on Cross Border Insolvency as well as with the Committee on Group Insolvency.

**Engagement with SEBI**

Separating the roles of the non-executive Chairman and the Managing Director (MD) / Chief Executive Officer (CEO) and ensuring that the Chairman and MD/CEO are not related, could become an onerous task for the industry. Enough checks and balances exist in the laws to counter potential compromise of corporate governance arising out of such a situation. A suggestion was thus made to SEBI and other concerned authorities to leave the appointment of the chairman and MD/CEO to the shareholders and the board. The provision now has been deferred by SEBI by two years till April 2022. Recommendations were also made on the SEBI consultative papers on proxy advisers, policy proposals with respect to resignation of auditors of listed entities and on insider trading, amongst others.

**Engagement with Competition Commission of India**

During the year, CII continued to engage with the Competition Commission of India (CCI). With a view to strengthening the existing Competition Law framework to align it to meet the new economy challenges, recommendations were made to the Competition Law Review Committee (CLRC) constituted by MCA. Suggestions were also submitted on the Competition (Amendment) Bill, 2020.

Keki Mistry, Vice Chairman and CEO, HDFC Ltd at the CII Governance Series in Mumbai
**ACTION**

During the year, the dialogue on trends and issues related to corporate governance continued through platforms such as the CII Corporate Governance summit; the conference on Fraud – Governance and Risk Management; Mergers, Acquisitions and Restructuring summit and the roadshow on Competition Law. The Governance Series, started in 2005, brought corporate thought leaders together on the subject. The conference on IBC - Roadmap for Effective Resolutions highlighted how the effective utilization of capital and promotion of entrepreneurship can become key drivers of IBC.

CII released the CII Code 2020 ‘Guidelines on Integrity and Transparency in Governance and Responsible Code of Conduct’. The guidelines are an attempt to serve as the base for corporates (large and small; listed and unlisted) to redesign their governance strategies in the face of ever changing business and regulatory environment. These guidelines are a combination of global practices; existing legal provisions (some of which may currently be applicable only to listed companies); good to have principles; regulatory policy suggestions and forward-looking concepts, aimed at enhancing the overall governance standards of companies in India by encouraging voluntary adherence to the guidelines, in letter and in spirit.

The guidelines enumerate 15 recommendations on topical issues covering integrity, ethics and governance; citizenship; role of a high performing Board; balancing interests of stakeholders; safe harbours for independent directors; easier settlement norms and amnesty provisions; risk management; succession planning; role of the audit committee; enhancing accountability of other third parties who play a fiduciary role; vigil mechanism; stakeholder, vendor and customer governance; investor activism and start-ups and MSMEs.

A collaborative effort was made to undertake research on ‘active ingredients’ that can spur effective leadership in boards of Asian companies, state of leadership capability, gaps at the board level and key capabilities for next generation board leaders. The collaboration was undertaken with the Centre for Creative Leadership (CCL) and included a pan-Asia consortium of institutes of corporate directors.

Throughout the year, members were encouraged to adopt the CII Model Code of Conduct for Business Ethics and the CII Advisory on Human Rights that outline principles and recommend actions for adhering to integrity and transparency in business transactions.
**JUDICIAL REFORMS AND LEGAL SERVICES**

Judicial reforms including reduction of pipeline of cases; alternatives to ‘imprisonment’ as punishment; steps to addressing pendency of cases and de-clogging at tribunal levels; and increasing use of technology will be critical. CII National Committee on Judicial Reforms deliberated on aligning roles and functions of the executive, legislature and judiciary for effective governance. The committee drove issues of pendency of cases and de-clogging the Indian judiciary, amongst others.

**ADVOCACY**

India is facing an increasing incidence of commercial and civil disputes being treated as criminal complaints, thereby creating fear amongst directors, young entrepreneurs and foreign investors. CII took up the exercise of identifying 37 business and economic laws and submitted a memorandum titled ‘Decriminalization of Business and Economic Legislations’ to the government. The memorandum advocated that the government may consider decriminalizing laws that fall within the ambit of arbitration or civil courts, unless these have been performed with an intent of fraud or misdoing. This will increase the confidence of both domestic and global players and provide a boost to ease of doing business in India. CII recommended that technical offences be dealt with as civil offences leading to the payment of a fine instead of imprisonment.

Based on multiple representations and continuous persuasions, the Cabinet approved the Companies (Amendment) Bill, 2020 in March 2020 bringing 72 changes in the Companies Act and removing criminality under the Act. MCA vide its Circular dated 2nd March 2020, also stated that prosecution proceedings will not be initiated against independent directors (ID) and non-executive directors (NED), unless there is strong evidence of their complicity in frauds committed by the companies.

The CII Task Force on Legal Services encouraged deliberations on technological innovations, services jurisdictions and trends in broad-basing legal services. Initiatives were undertaken to encourage provision of legal aid in civil and criminal matters, including online legal advice, for the poor, marginalized citizens and start-ups. Adoption of technological innovations for achieving a balance between physical law services were deliberated during the year.

**ACTION**

India should pursue a target of ranking amongst the top 20 in the Rule of Law Index released by World Justice Project every year. This was highlighted at the national conference on legal and regulatory issues-sectoral reforms. The conference deliberated issues, challenges and legal reforms facing focus sectors such as MSMEs, pharma, healthcare, FMCG, real estate, infrastructure and BFSI.

From L to R: Manoj K Singh, Founding Partner, Singh & Associates and Joint General Secretary, Society of Indian Law Firms; Nusrat Hassan, Co-Managing Partner, Link Legal India Law Services and Secretary General, Chartered Institute of Arbitrators, India; Dr Lalit Bhasin, Chairman, CII Task Force on Legal Services and Managing Partner, Bhasin & Co; Sudhanshu Pandey, the then-Additional Secretary, Department of Commerce, Ministry of Commerce & Industry and Susan Acland-Hood, Chief Executive, Her Majesty’s Courts & Tribunals Service at the CII National Conference on Legal and Regulatory Issues in New Delhi.
The importance of adopting the highest compliance standards in making financial disclosures can hardly be undermined. CII continued to provide a thrust to the philosophy that a company must make a true and fair view of its affairs available to all existing and potential stakeholders. Strong accounting and auditing standards, with fair disclosures of financial information, was also promoted through a series of activities.

**FINANCIAL REPORTING**

During the year, corporate India was effected by incidents such as abrupt resignations of auditors, risk management, mergers & acquisitions, valuations, IBC, cyber security regulations, relationship of CFOs with boards and audit / other board committees. The CII National Committee on Financial Reporting and the CII National Committee for CFOs engaged with relevant authorities on these and several other issues impacting the industry.

**ADVOCACY**

As a member of the Task Force constituted by MCA to review Company Auditor’s Report Order (CARO), CII provided suggestions to review the CARO regulations. Detailed representations were made to MCA on IND AS115 & IND AS116. CII submitted recommendations on the SEBI consultative papers on resignation of statutory auditors from listed firms for disclosure by auditors and for strengthening the role of the audit committee. CII also shared its recommendations as part of the MCA-constituted expert committee for examining institutional framework to regulate valuation professionals.

Discussions with International Accounting Standards Board (IASB) revolved around the issues of deferred tax on assets and liabilities arising from a single transaction; the training costs to fulfil a contract and disclosure of accounting policies. The National Financial Reporting Authority (NFRA) addressed specific concerns of CII members in a closed door interactive session.

**ACTION**

In a rapidly changing world, CFOs need to adapt to the business and technology ecosystem to capitalize on the emerging growth and high performance opportunities and find ways of building trust. Stakeholders exchanged ideas and experiences on the need and the changing
role of the CFO during the CFO Summit as well as the CFO Series. The breakfast sessions on IND AS116, held in four cities, provided insights into the regulatory changes on the leasing standard as well as the emerging digital technologies. During the conference on corporate frauds, governance and risk management, a CII survey revealed the likely trends, key triggers and the risk management for frauds in governance.

NATIONAL FOUNDATION FOR CORPORATE GOVERNANCE (NFCG)

The National Foundation for Corporate Governance (NFCG), set up in the PPP mode, aims to foster a culture of corporate governance, both at the corporate as well as the industry level. Towards this end, the Ministry of Corporate Affairs (MCA) partnered CII, the Institute of Company Secretaries of India (ICSI), The Institute of Chartered Accountants of India (ICAI), The Institute of Cost Accountants of India (ICMAI), National Stock Exchange (NSE) and the Indian Institute of Corporate Affairs (IICA). CII has served as the Secretariat for NFCG since its inception in 2003.

Accredited management institutions and partner institutions found support from NFCG in over 290 programmes and more than 40 research studies on corporate governance and related subjects. Some partner institution initiatives included the conference on Insolvency and Bankruptcy Code and National CSR summit, a workshop on Independent Directors and another workshop on Integrating Governance with Environmental & Societal Responsibilities by IICA.

NFCG supported a range of programmes and research of accredited institutions. These included a case writing competition to research on the changing face of corporate ethics and another on the enhanced role of corporate governance in India.

In fulfilling the vision of being a key facilitator and reference point for highest standards of corporate governance in India, NFCG strove to achieve new milestones. In this trajectory, the foundation pursued the mission to foster a culture of good corporate governance and create a framework of best practices, structure, processes and ethics. Efforts were also made to reduce the gap between the corporate governance framework and compliance and to facilitate effective participation of different stakeholders. Capacity building in emerging areas was catalysed through a variety of initiatives.
CII continued to create forums for industry, policymakers and parliamentarians to deliberate upon important policy and development issues. The CII Public Policy Council drove this agenda through a series of roundtables and one on one meetings with Members of Parliament (MPs). The year saw the creation of CII Parliamentary Forum, chaired by Shri Suresh Prabhu, Member of Parliament and India’s Sherpa to G20 and G7.

**ENGAGEMENTS WITH MPs**

**State-wise Roundtables**

During the first session of the Parliament, after the General Election 2019, state specific meetings were organized with MPs from Andhra Pradesh, Bihar, Haryana and Jammu & Kashmir. Presentations were made on issues such as lack of availability of land, developing world class green cities, creating multi modal logistics hubs, tourism, food processing, horticulture, industrial development, ease of doing business, social sector, skill development, entrepreneurship, developing industrial corridors, national manufacturing zones and encouraging MSMEs.

**Sectoral Roundtables**

Encouraging increasingly competitive processes and creating transparent mechanisms for faster implementation of transmission grids to support India’s Renewable Energy goals is a key growth factor for the sector. A whitepaper highlighting this imperative found the focus of discussions at the roundtable on renewable energy. The voice of the customer of India’s power sector, compiled in a report by CII and AT Kearney was also presented at the roundtable. Other key issues such as DISCOM dues, regulatory challenges, and India’s first-generation ethanol value chain were emphasized during the meeting.

**Parliamentary Standing Committee Meetings**

CII continued to share industry concerns with various Parliamentary Standing Committees, the high-level forums for apprising policymakers on issues facing the industry. The issues raised included, amongst others, challenges and opportunities with respect to export of organic products and the impact of banking misappropriation on trade and industry. CII also deposed
before the Committee on Labour on subjects such as occupational safety, health and working conditions.

Meetings with MPs and Political Leaders

MPs and political leaders were briefed on various CII initiatives and policy recommendations during one-on-one meetings. Their views were also sought on possible future initiatives by CII.

Introducing the Future Business Group to the MPs in an exclusive session, members also shared their views on shaping future policy paradigms, fostering government-industry cooperation and prospects & challenges facing future businesses.

Inputs and support were also sought on CII’s initiatives and plans for Kerala’s development during a meeting with the state’s MPs. Recommendations were made on creation of infrastructure to give a fillip to MSMEs.

Formed with the objective of engaging with policymakers on issues that impact the country’s development and economic growth, the CII Parliamentary Forum saw interest from 30 MPs from across political parties. During the first meeting, which was attended by 16 MPs, the discussions were focused on three important issues of water security; environment, air pollution and crop residue management and employment generation.

MEETINGS WITH VISITING DELEGATIONS

An interaction of Indian parliamentarians with an incoming parliamentary delegation from China was organized in association with the Chinese Embassy, New Delhi. CII engaged with 59 MPs across the political parties through various meetings held during the year.

India’s Vision 2022 and Saudi Arabia’s Vision 2030, both outlining a series of reforms to develop an investor friendly ecosystem, complement each other. The opportunity created by this synergy and alignment for the 2 nations to collaborate was highlighted at the dinner meeting of the CII Parliamentary Forum members with H.E. Dr Ahmed Al Sati, Ambassador of Saudi Arabia to India.
TAXATION

During the year, CII continued to engage with the government towards reforms in both direct and indirect taxation. Support was extended to the government’s efforts at reviving the economy by creating awareness about measures taken, suggesting changes, implementation of BEPS provisions and digital economy taxation. Effective implementation, administration and structure of the GST law and returns and anti-profiteering provisions remained an area of focus.

ADVOCACY

The year 2019-20 saw two presentations of the Union Budget. Based on industry expectations, a pre-budget and post-budget memoranda, on direct and indirect taxes, was submitted for both. On various occasions, industry perspectives were also shared with the Minister of Finance and Corporate Affairs, the Revenue Secretary and senior officials of the revenue department.

The long-standing suggestions of reducing the corporate tax rates to 22%, as well as reduction in MAT, were addressed by the government. However, to reverse the tax inequalities caused by the disallowance of exemptions and incentives, as well as the application of tax rate of 15% plus cess on certain categories, it was suggested that all tax rates be converged to 15%, with no exemptions and incentives, over a period of three years.

The efforts at full implementation of BEPS regulations in India continued with representations made to OECD. Tax on accreted income of trusts, Section 10AA of the Income Tax Act, double taxation levied on superannuation fund, applicability of TDS on cash withdrawal, industry issues on the Advance Pricing Agreement, disallowance of purchases from associated enterprises, and others related to Direct Taxes were pursued with the relevant authorities for resolution. Advocacy towards reintroduction of the classical tax system continued during the year.

To encourage risk capital investment, the government was requested to consider exempting equity capital from Long Term Capital Gains (LTCG) tax altogether. In
the absence of this suggestion being feasible, it was recommended that the LTCG and also other asset classes may be brought under a single simplified rate of 10%. Further, the holding period for determination of LTCG could be fixed at 12 months for all asset classes.

CII had recommended that electricity, oil and gas, real estate and alcohol should be included under GST. Other suggestions made included a rate structure of 2-3 slabs; the need to further rationalize 28% category to only cover de-merit goods and that the rate rationalization should address the inverted tax issues.

The industry was enthused by the government’s addressal of the issue of capital blockage and cash flow due to delays in refund arising out of an inverted tax structure and for supply to railways, introduction of a single point disbursement of GST refunds and the rationalization of GST rates applicable to construction, real estate, hotels, restaurants and job work services. A representation on restricting eligibility of input tax credit to non-business purposes and eliminating reversal for supply of free business samples, demo/testing of vehicles, CSR activities and investment in securities was also submitted. In addition, the government was requested to cover tax paid on input services and capital goods under eligibility of refund of accumulated taxes. Another suggestion was to allow input tax credit in case of supply of goods by an Indian supplier to a foreign company, wherein goods do not physically move out of India.

It is widely accepted that moving towards a simpler GST regime would lead to enhanced compliance and ease of doing business. Towards this end, the government took cognizance of several CII recommendations by implementing them. Others that were pursued during the year included a request for extending the time limit for availing input tax credit for FY 2018-19 and due date for filing GST annual returns and GST reconciliation statement for the FY 2017-18. A request was also made for GST TRAN 1 to be reopened and industry concerns to be addressed by restoring ITC in E-Credit Ledger that has been held up because of system constraints.

Single registration process, redressal of GST on cross charge for services and announcement of clear guidelines on calculation of pricing and profits to comply with anti-profiteering provisions were discussed at length with the government. Removal of conditions imposed for claiming IGST refunds on exports, review of various FTAs, allowing debit of IGST from duty scrips and other areas of alignment of customs law with GST law were brought to the fore.

In the Union Budget, announced on 1 February 2020, the government accepted CII’s long standing recommendation of removal of Dividend Distribution Tax and introduction of the classical system of taxing dividends in the hands of shareholders. Also, the government committed to strengthening the provisions of Safeguard and Anti-Dumping Duty to help Indian industry become globally competitive.

**ACTION**

While a series of memoranda were submitted to the Government to develop a simpler tax regime in the country, CII also provided several platforms for stakeholder engagement. These included post budget interactive sessions with senior officials of the Ministry of Finance in Delhi, both for 2019-20 and 2020-21, and a webinar in partnership with the Income Tax (Systems) division to address compliance challenges, dispute resolution and ease of doing business. These were also addressed by the Principal Additional Director General GST in a meeting of the CII National Committee on Taxation. The trial version of the new GST return filing system was demonstrated at workshops, organized in association with GSTN at Gurgaon, Pune, Goa and Mumbai.

Kanu Verma, Principal Additional Director General, GST at the first meeting of the CII National Committee on Taxation in New Delhi
NURTURING COMPETITIVENESS
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<td>CII Institute of Quality</td>
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<td>CII-ITC Centre of Excellence for Sustainable Development</td>
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<td>CII Centre of Excellence for Competitiveness for SMEs</td>
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<td>CII Naoroji Godrej Centre of Manufacturing Excellence</td>
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<td>CII-Suresh Neotia Centre of Excellence for Leadership</td>
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### CII CENTRES OF EXCELLENCE
Catalysing Competitiveness Across Industries

**AGRICULTURE**
CII-Jubilant Bhartia Food and Agriculture Centre of Excellence
*New Delhi*

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<tr>
<th>FOCUS</th>
<th>Improving competitiveness of agriculture and food value chain by catalyzing innovations, building capacity and enhancing competitiveness</th>
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<td>80+ AgTech ventures registered on NAVI platform</td>
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<td>2.4 Crore meals impacted under the Food Safety interventions</td>
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<td>2,100+ Trained in food safety &amp; quality and good handling practices for fishery</td>
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**GREEN BUSINESSES**
CII-Sohrabji Godrej Green Business Centre
*Hyderabad*

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<td>674 Green building projects registered</td>
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<td>132 GreenCo registrations and energy audits</td>
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**LEADERSHIP DEVELOPMENT**
CII-Suresh Neotia Centre of Excellence for Leadership
*Kolkata*

<table>
<thead>
<tr>
<th>FOCUS</th>
<th>Building leadership capabilities across different levels of businesses and industry</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>410 Future leaders underwent training</td>
</tr>
<tr>
<td></td>
<td>192 Companies impacted</td>
</tr>
<tr>
<td></td>
<td>12 Training interventions</td>
</tr>
</tbody>
</table>

**LOGISTICS**
CII Institute of Logistics
*Chennai*

<table>
<thead>
<tr>
<th>FOCUS</th>
<th>Transform India as a global leader in logistics and supply chain</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6,000 Professionals participated in training sessions</td>
</tr>
<tr>
<td></td>
<td>1,500 Newly certified supply chain professionals</td>
</tr>
<tr>
<td></td>
<td>221 Companies participated in SCALE awards and 13 warehouses certified</td>
</tr>
<tr>
<td>MANUFACTURING</td>
<td>CII Naoroji Godrej Centre of Manufacturing Excellence</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td><strong>FOCUS</strong></td>
<td>Foster pre-eminence and competitiveness to create a global manufacturing hub in India</td>
</tr>
<tr>
<td></td>
<td>2,235+ industry professionals impacted through 95 interventions (cross-level)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUALITY</th>
<th>CII Institute of Quality</th>
<th>Bengaluru</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS</strong></td>
<td>Quality for a new India</td>
<td></td>
</tr>
<tr>
<td></td>
<td>274 companies advised 39 companies won the BE award and recognitions</td>
<td>3,603 industry participants benefited from 141 training programmes/workshops and other activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SME COMPETITIVENESS</th>
<th>CII Centre of Excellence for Competitiveness for SMEs</th>
<th>Chandigarh</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS</strong></td>
<td>Making Indian MSMEs Globally Competitive</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3,105 participants benefited from training programmes, workshops and webinars</td>
<td>989 companies impacted through clusters, audits, consulting and government supported projects</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUSTAINABILITY</th>
<th>CII-ITC Centre of Excellence for Sustainable Development</th>
<th>New Delhi</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS</strong></td>
<td>Advance the agenda of sustainable business practices in India</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1,160 trained professionals</td>
<td>32 training programmes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WATER</th>
<th>CII-Triveni Water Institute</th>
<th>New Delhi</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FOCUS</strong></td>
<td>Water conservation, water efficiency and wastewater management</td>
<td></td>
</tr>
<tr>
<td>800 people sensitized; 100+ B2B meetings conducted</td>
<td>170 companies advised; 19 water audits conducted; 38 companies awarded</td>
<td>20 WATSCAN projects on water security undertaken</td>
</tr>
</tbody>
</table>
Building logistics excellence in India requires continuous initiatives and impetus. In this direction, year 2019 saw large scale industry commitment to further build the momentum. A new training programme was designed and implemented for UN missions. A training programme was implemented under an Indo-Japan cooperation effort with support from Japanese experts in India and a study mission to Japan was also undertaken.

The following ongoing development activities, undertaken by the institute, were given a thrust during the year:

- Advisory services for efficiency improvement
- Functional skill training programmes
- Functional qualifications in logistics, supply chain and shipping tracks
- Professional competency assessments (SCM PRO & SCM EXE)
- Assessments and Certifications (WAREX)
- Warehouse Kaizen in India under the Indo-Japan cooperation

**ACTION**

Working with various stakeholders, the institute strives to build the image of the logistics sector, create and disseminate knowledge and help build competitiveness through international cooperation.

**Education**

- The distance education programmes in logistics management, supply chain management, third party logistics and competitive supply chain management saw over 2,500 participants get trained
- Students of 25 educational institutes benefitted from the short-term certification programmes in logistics and supply chain management
- CIL continued to successfully deliver the UN Senior Transport Management Staff Programme, with the 3rd batch undergoing the programme
- A new UN Requisitioner training programme was developed and implemented in Colombia, Italy, Lebanon and Uganda

*CII SCALE Award winners 2019 in Bengaluru*
A knowledge transfer programme was completed as part of the Indo-Japan cooperation with participation from a 10-member industry delegation. The programme was implemented with support from the Association for Overseas Technical Cooperation and Sustainable Partnerships (AOTS) and Japan Institute of Logistics Systems, entrusted by Ministry of Economy, Trade and Industry, Japan.

Cumulative admissions to educational programmes crossed 5,000, covering 650 companies spanning 22 states in India.

Training / Certification

- More than 1,000 professionals from various supply chain management domains underwent sector specific training on topics such as supply chain, export-import, GST, leadership and technology.

- Over 8,000 working professionals trained through CII-IL’s corporate training programmes.

Supply Chain and Logistics Excellence Awards (SCALE) 2019

The SCALE awards recognize organizations that have achieved significant improvement in integrating supply chain and logistics functions. This recognition is aimed at accelerating the enablers for building a world class supply chain and to prompt organizations to develop future ready supply chains, bringing knowledge and fresh perspectives to the industry. With 193 companies participating, the 6th edition of these awards was larger than ever. The periodic assessment of supply chain excellence in strategy and practices across the industry is a step towards achieving global supply chain excellence.
With a vision to be a Centre of Excellence of international repute that provides role model products and services for the continuous betterment of organizations and society, the CII Institute of Quality (CII IQ) continued to help build products, services and companies for the advancement of industry and society. During the year, the centre endeavored to build capability, improve competitiveness and deliver value to the industry through a host of services under the four verticals of Business Excellence, Total Productive Maintenance, Quality Metrology & Standards and Lean Six Sigma.

BUSINESS EXCELLENCE

In 2019, India’s Business Excellence movement celebrated 25 years of Excellence in collaboration with the long standing partners, Exim Bank of India and EFQM. The coveted CII-EXIM Bank Award for Business Excellence is based on the globally acclaimed holistic, non-prescriptive management framework for Performance Excellence and Organizational Transformation by EFQM and administered by CII IQ. The award winners have contributed significantly to the creation of role model practices by Indian organizations.

The Business Excellence Conclave focused on sharing best practices and recognizing organizations that had achieved a momentum on their excellence journey. Ten hospitals and healthcare providers were felicitated with the newly instituted BE Star Icon Recognition the preparatory phase for the CII Healthcare Excellence awards that are based on the Baldrige Excellence Framework.

An MoU was also signed with the Malcolm Baldrige Foundation, USA to continue to build Business Excellence in areas such as healthcare, education and not for profit. The Malcolm Baldrige Foundation is globally recognized as a premier institution in this area as it helps create value through research and deployment of cutting-edge management practices.

CII IQ is also a member of Global Excellence Council (GEC), the forum of all major award administrators of Excellence in their respective regions and continued to engage with them for exchange of best practices.
TOTAL PRODUCTIVE MAINTENANCE

Having begun TPM adoption in the 1990s, the Indian industry continued its journey towards building competitiveness through integration of this philosophy in business operations. Of the several Indian companies that have won the Japan Institute of Plant Maintenance award, a large number have been assisted by CII IQ.

Mr Yoshitaka Murase, Senior Assessor & Executive Advisory Engineer, Japan Institute of Plant Maintenance (JIPM) helped build capacity to enable Indian companies to aim for higher international benchmarks and awards. A book titled Concept & Method of Pursuing Advance TPM, authored by him, was released during the year.

Over the last 15 years, 130 Champion of Champions and National Champions were recognized by CII for their commitment to TPM. Of the 67 teams that participated, 14 companies were given Dr Surinder Kapur Endowment Awards, The Champions’ Trophy.

Under an agreement signed with Munjal Showa, CII IQ endeavored to promote the TPM philosophy in the technical education sector and to train young entrepreneurs. These initiatives will be driven through the newly-launched Satyanand Munjal TPM Training Centre (SMTTC).

QUALITY, METROLOGY & STANDARDS

Efforts to build capacity in quality, risk and process management, develop frameworks, tools and benchmarks and undertake research studies continued during the year. The National Competition on Low Cost Automation and Digitalization, Robotics & Automation saw 23 companies share projects that resulted in improved productivity, quality, cost, delivery, safety, morale and energy. Over 250 delegates interacted with 34 case study presenters that included implementers, gadget and low-cost automation service providers.

The other significant platforms that encouraged stakeholder interaction included the Regional Quality Conclave and the Conference on Building Information Modelling (BIM) and Digital Construction Management. Capacity building for implementation of quality tools such as 5S, 7QC tools and root cause analysis was driven through both in-house and open house programmes.

The recent collaboration with Union of Japanese Scientists and Engineers (JUSE) will help CII IQ build the movement for quality education, training and research. The leading quality organization from Japan specializes in education and training in quality management, reliability engineering, multivariate analysis, marketing analysis, sensory evaluation, product liability and ISO management systems amongst others.

LEAN SIX SIGMA

CII IQ continued to develop change leaders in operational excellence and continuous improvement through Lean and Six Sigma certifications. Training programmes, best practice visits and competitions helped accelerate adoption of these concepts through cross learning.

ACTION

At the 27th Quality Summit held in Bengaluru with the theme ‘Rethinking Quality for New India’, Minister of Chemicals and Fertilizers, Shri D V Sadananda Gowda
was joined by several industry leaders. The first Quality Ratna award was conferred on Mr Suresh Krishna, Past President, CII and Chairman, Sundaram Fasteners Ltd in recognition of his leadership towards propagating the quality movement in India; Mr Yogesh Munjal, Chairman & Managing Director of Munjal Showa Ltd and Mr David Rasquinha, Managing Director of EXIM Bank of India were felicitated for their valuable contribution to building India’s quality movement. The summit was attended by over 600 delegates and it was preceded by four masterclasses.

Over 200 delegates deliberated upon the challenges, best practices, case studies and the way forward with quality gurus, TPM experts and faculty from JIPM and JMAC during the 19th TPM National Conference. Godrej Lawkim Motors became the first recipient of the Award for Excellence in Operation Technology, launched by TPM Club during the conference.

While celebrating 18 years of building a quality movement in India, CII IQ looked ahead with the theme - Building Competitiveness in Technology Era. Deliberations were focused on opportunities and challenges facing the Indian industry, with the disruptive impact of technology, automation and digitalization across the value chain. The centre is in the process of creating a roadmap to support the industry in bridging the technology gap.

A Smart Manufacturing Maturity Assessment Model for digital solutions was developed by the centre for the first time and it is available on the CII Smart Manufacturing Platform. It focuses on organizational transformation by emphasising on digitalization strategy, workplace culture and people management and technological transformation by stressing on areas such as infrastructure, production, supply chain & logistics.
CII-ITC CENTRE OF EXCELLENCE FOR SUSTAINABLE DEVELOPMENT

CII-ITC Centre of Excellence for Sustainable Development (CESD) nurtures companies to enable them to compete and expand their opportunities and to help them excel in the current dynamic business environment. CESD continued to pursue its mission of encouraging and accelerating innovative ideas and solutions for sustainable value creation by businesses and their stakeholders. The agenda was driven through policy advocacy, thought leadership, advisory and in-company capacity building efforts.

ADVOCACY
The Un-plastic Collective
Globally, an estimated 8.3 billion tonnes of virgin plastic have been produced till date. The CPCB estimates an annual consumption of 16.5 million tonnes of plastic, with plastic waste generation at 9.4 million tonnes (2017-18). To address this issue, the Un-plastic Collective, a voluntary, multi-stakeholder platform, co-partnered with UNEP and WWF India, was launched at the 14th Sustainability Summit, to move beyond regulation and minimize externalities of plastic on the environmental, ecological and social health of the planet.

The collective seeks to galvanise industry, government and investor commitments to reduce plastic generation and consumption and improve plastic waste management through a series of qualitative and science based quantitative approaches. In the long-term, the collective will endeavour to

- Provide a platform for projects on plastic management
- Initiate business reporting on plastic consumption and set concrete reduction targets
- Develop knowledge products to steer conversations on plastics at the national level
- Direct attention to replace plastic wherever possible.

A recent CII report titled The Un-plastic Strategy, summarizes the scale of the impact of plastics and provides businesses a strategy to combat the issue.

14th Sustainability Summit
The 14th Sustainability Summit brought to light the importance of science and innovation for sustainable development as it revolved around the themes of science, systems and sustainability. The summit, which
was attended by Shri Piyush Goyal, Minister of Commerce & Industry and Railways, was carbon neutral and steps like reduced use of paper, no plastic bottles and cotton-based material for all backdrops, hoardings and signages were taken to reduce the carbon footprint.

The CII Cleaner Air-Better Life Initiative

The CII Cleaner Air-Better Life initiative gathered significant momentum with the key stakeholders playing an active role. The India CEO Forum on Clean Air, a core group of 19 CEOs formed during the year, will work under this national initiative with a mission to accelerate clean air action in India. The CEO forum aims to achieve tangible improvement in ambient air quality, by committing action on air pollution and providing leadership for clean air action. The India CEO Forum for Clean Air expects all forum members to sign a common declaration. Going forward, four specific workgroups were proposed under the CEO forum for preparing roadmaps on strategically important areas/issues. These include a workgroup on transportation & mobility, another on construction for industry roadmaps from a systems perspective, a third workgroup on best practices and fourth one to assess technologies for controlling air pollution.

The CII-NITI Aayog Report on Clean Industry outlines two key strategies for addressing fugitive emissions and energy-related emissions and made recommendations for reducing air pollution from major industrial sources in the Delhi National Capital Region (NCR) air-shed. A Task Force on Clean Industry, constituted by NITI Aayog, made actionable recommendations, grounded in scientific understanding of sources and their associated load of pollutants that have public health implications. Some of these are:

- Mandatory contractual obligations on clean construction by local bodies/authorities for all individuals/organizations
- Strengthened building code and model byelaws for ambient AQ management during construction and end-of-life phase
- Developing capacity of urban local bodies for monitoring and enforcement
- Strengthened penalties to individuals (10-15% of project cost) by ULBs and to local bodies/authorities (in lieu of the estimated cost of damage) by SPCBs
- Strengthened monitoring by local bodies/authorities using portable emission monitoring systems
- Sustainable supply chains for construction materials using sustainable materials (locally sourced and recycled) based on technical feasibility
- Mandatory use of multi-utility service ducts/corridors, along with ICT enabled platform for inter-agency coordination.

Tejpreet Singh Chopra, Co-Chair, CII National Initiative, ‘Cleaner Air Better Life’ and CEO and President, Bharat Light and Power and Nitin Prasad, Chairman, National Initiative: ‘Cleaner Air - Better Life’ and Chairman, Shell India at the 1st meeting of the India CEO Forum on Air Pollution in New Delhi
ACTION

Business and Biodiversity

The Western Ghats are facing the threat of biodiversity loss, degradation of ecosystem services and extreme weather conditions amongst others. The spice crops in this region are negatively impacted by the biodiversity losses such as soil degradation, pest attacks on crops and the changing weather patterns. CESD is working with spice companies to identify the biodiversity risks in the area through biodiversity and ecosystem service assessments across the value chain and suggest adaptive measures to address this challenge. A training module is also being developed for implementation of tools and measures to mainstream biodiversity in the sector. A guidebook for integrating biodiversity in the Western Ghats’ spice sector, that documents the learnings, findings and observations of the companies and their inter-linkage with biodiversity and ecosystem services, was released during the year.

Climate Change

CESD is the knowledge partner for the Climate Action Programme (CAP) 2.0° introduced by CII in partnership with DSM. This programme aims to acknowledge credible action for adapting or mitigating climate change. The 20 large companies and 50 SMEs that participated in the first cycle of CAP 2.0° underwent a rigorous evaluation process, including on-site assessments, by a peer team of assessors who spent approximately 700 man-hours per application over a period of six months. The shortlisted applicants were then validated by a pre-eminent jury comprising of leading figures from government, civil society and academia. Of these, 4 large organizations and 2 SMEs received the first ever climate action recognition at a ceremony held in New Delhi.

Resource Efficiency in the Steel and Paper Sectors

Recognizing the importance of data-backed policy making, CESD released a study on Resource Efficiency in Steel and Paper Sectors. A systems-based Material Flow Analysis (MFA) tool was used for identifying the scope for resource efficiency and circular economy in the steel and paper sectors and possible benefits to climate change mitigation. The key findings of the report presented at World Resources Forum Conference in Geneva include:

Steel
- 71% of iron-bearing material required for manufacturing crude steel comes from iron ore, suggesting the potential for increasing scrap-use in the value chain. For instance, a 15% increase in overall steel production, with increased EAF and IF outputs will increase scrap consumption by 13.4% leading to savings of 0.8 million tonnes of iron ore and thereby reducing GHG emissions
- A complete transition to Hydrogen based DRI (H-DRI) technology, recommended by the study, could translate into savings of 17 to 19 MT of coal.

Paper
- The scope for increasing efficiency in pulp and paper mills using recovered paper as fibre source, is significant. The paper industry meets 32% of its recovered paper demand from imports
- Ensuring standardization in the quality of imported paper is estimated to cut requirements by 0.86 MT (a reduction of 20% from current levels).
The CII Centre of Excellence for Competitiveness for SMEs (CII CFC) delivers a highly specialized portfolio of technical consulting and advisory services as well as capability development, internal competitiveness and resource efficiency enhancement. Working in tandem with government bodies, industry and institutions, the centre takes forward a robust agenda to catalyze sustained growth through professional interventions in manufacturing and operational excellence, energy efficiency, human resource management, corrosion mitigation and training and upskilling across sectors.

**ADVOCACY**

Pursuing the objective of strengthening the MSMEs’ contribution to the country’s economy, CII CFC worked towards building world-class, future-ready MSMEs by enhancing their overall competitiveness. Awareness programmes about the impact of manufacturing excellence, productivity, quality, environment, energy management, human resource management and anti-corrosion interventions were held through the year. In addition, the centre also handed MSMEs in the implementation of these concepts through the cluster approach, consulting assignments, sharing best practices and workshops and trainings. Specific needs of SMEs to get aligned to OEM supply chains were also addressed.

**ACTION**

**Building Sustainable Competitiveness**

With a view to building competitiveness, CII CFC guided the industry through various business models of manufacturing adopting the cluster approach. About 3,110 companies participating in over 256 industry clusters recorded aggregate savings of more than INR 1,112 crore. The companies were able to save floor space and reduce inventories as well as customer complaints. Both customer returns and in-process rejections reduced by 70-100%. The cluster roadmap also helped companies reduce machine break-downs, enhance ownership and employee involvement and develop a sustained improvement culture across the organization.

In this direction the 12th edition of the National Competitiveness & Cluster summit also deliberated on the attributes that would enable SMEs to integrate into global value chains. Over 350 delegates benefitted from the presentations on manufacturing excellence best
practices. Several world-class SMEs were recognized with prestigious competitiveness awards based on pan-India competitions.

**Building Next Gen Manufacturing**

The centre is recognized both by the industry as well as the government for creating benchmarking success stories through interventions across organizations. These value-added interventions help companies achieve bottomline improvement, implement lean manufacturing practices, better their quality, cost delivery and culture parameters and implement world class shopfloor practices. The centre’s three competitions - Kaizen Circles, SS Excellence awards and Poka Yoke - motivate the industry to improve product development, quality and employee engagement and accelerate adoption of best manufacturing practices for sustainable growth. Over 200 teams participated in these competitions and the winners included teams from companies such as Yazaki India, Subros and Honda Car India.

**International Interventions**

The Indo German Manager Training Programme, launched in 2009, aims at making Indian industry fit for bilateral trade and business with companies from Germany. Over the last 11 years the centre has been preparing executives from India to join this programme. Companies with foreign trade potential undertake a one-month programme in Germany, that helps develop management expertise, gain insights into German business practices and systematically establish contacts with German companies. The programme has facilitated export and import deals worth Euro 13.46 million; investment of around Euro 1 million; technology transfers; collaborations and even joint ventures. More than 40% participants initiated imports / exports between the two countries and 67% participants witnessed an increase in their business globally. Over the years, 415 managers have undergone IGMTP.

**Promoting National Mission for Energy Management**

Energy is a major component of cost of production making energy efficiency an excellent tool for improving cost competitiveness. The centre has helped companies save INR 2,923 million through 208 energy audits conducted till date in sectors such as auto & auto components, engineering, pharmaceuticals and chemicals, food processing, commercial buildings, FMCG, refinery, rice mills, textile, pulp & paper, power and sugar.

Technical conferences and expositions on energy efficiency, environment and technology: The National Energy Efficiency Circle Competition and a series of training programmes helped promote energy efficiency techniques and innovations. These forums inspired energy managers by encouraging their efforts in improving energy efficiency and by reducing consumption of natural resources.

**World Class Energy Efficiency Initiatives**

The centre worked as an implementation partner with various stakeholders like Bureau of Energy Efficiency, World Bank, SIDBI, UNIDO etc. to implement energy efficiency projects in SME sectors.

Support is provided to MSMEs under the ‘BEE-GEF-World Bank Project on Financing Energy Efficiency at MSMEs’ for design and implementation of Energy Management Systems as per IS/ISO 50001 Standard. 50 units were certified; 250 units were covered and 100 units benefitted from the SIDBI project of Providing Project Development Support for Enhancement of Energy Efficiency and 21 units benefitted from the GreenCo Rating System project.

**Industry’s Energy Efficiency Efforts**

Providing a major impetus to the National Mission for Enhanced Energy Efficiency (NMEEE), 104 companies across various sectors achieved an annual recurring
saving of INR 150 crores in 2019-20 by implementing best energy efficiency practices. Over 150 energy efficiency teams shared their energy management strategies and best practices during the National Energy Efficiency Circle Competition. Awards were conferred on 31 companies, including Asahi India Glass, Roorkee and Hindustan Unilever, Silvassa.

**Corrosion Management Services**

Consequences of the corrosion process are a significant global challenge, given its huge economic and environment impact on virtually all facets of infrastructure, from highways, bridges, and buildings to oil and gas, chemical processing, water and wastewater systems and particularly industrial structures. Indian industry suffers annual losses of over INR 3.6 lakh crore triggered just by corrosion. In pursuit of enhancing the competitiveness of Indian industry, CII has been offering corrosion management services over the last 13 years. Taking forward the war against corrosion, CII CFC trained about 600 industry professionals through the Corrosion Manager Course for Paints and Coating Manager.

The 6th edition of Corrosion Management summit continued to promote the concepts of corrosion mitigation and impact of corrosion. During the summit, senior government officials expressed their intent of converting the voluntary and self-regulatory standards into mandatory norms to steer the industry towards global competitiveness.

**Empowering Human Resources**

CII CFC aimed at transitioning companies from Transactional HR to Transformational HR. In-company assignments helped sensitize SMEs about the business value creation possible through human resource optimization and by adopting ethical and sustainable practices. Companies were counselled to define and build transparent HR processes, performance metrics, reward systems, learning and development culture and total employee involvement with seamless use of technology.

The 3rd edition of the National HR Circle Competition was organized to showcase benchmark HR practices and innovative strategies being adopted by companies in India. Attended by over 100 participants, it saw 32 teams compete for the winner’s trophy.

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**Key Parameters (2019)**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
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<tbody>
<tr>
<td>Savings from 28 Energy Audits (INR million)</td>
<td>392</td>
</tr>
<tr>
<td>SME units benefitted from implementation of government and international stakeholder supported projects for SMEs</td>
<td>500</td>
</tr>
<tr>
<td>Number of companies handheld through 9 ongoing clusters for competitiveness</td>
<td>61</td>
</tr>
<tr>
<td>Kaizens undertaken by Indian SMEs to showcase continuous improvement through cluster approach</td>
<td>1,01,400</td>
</tr>
<tr>
<td>Training programmes, workshops and webinars</td>
<td>100</td>
</tr>
<tr>
<td>Industry participants from over 400 companies</td>
<td>2,500</td>
</tr>
<tr>
<td>Savings achieved by 61 companies from 9 ongoing clusters/assignments (INR million)</td>
<td>266</td>
</tr>
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</table>
Striving to achieve manufacturing/operational excellence is key to a manufacturing organization’s sustainable performance and growth. The CII Naoroji Godrej Centre of Manufacturing Excellence (CII CME) promotes and fosters pre-eminence and competitiveness towards building India into a global manufacturing hub. The centre’s initiatives support organizations in their journey towards manufacturing excellence by:

- Enhancing competitiveness
- Forging alliances with academia, R&D establishments, government and industry
- Building a well-trained ‘smart force’
- Creating globally relevant manufacturing leaders
- Compiling a narrative on ‘Indian Way’ manufacturing.

** Occupational Health & Safety **

CII’s Task Force on Industrial Safety launched a series of initiatives with a view to bringing focus on Occupational Health and Safety (OHS) in the evolving global environment. With members from sectors such as engineering, chemicals, power and FMCG amongst others, the Task Force strives towards developing excellence in safety processes and standards.

A mentorship approach to help SMEs was adopted by companies assessing their vendors’ safety readiness, identifying risks and devising an action plan for continual improvement. In addition to vendor visits, the workshops on general safety awareness and the missions to companies such as Godrej & Boyce Mfg Co Ltd, Mahindra...
& Mahindra Ltd, Tata Power Ltd and Croda Chemicals Ltd provided SMEs an opportunity to learn efficient safety practices.

Close to 150 safety professionals representing more than 70 organizations deliberated on the OHS challenges for future-ready organizations at the 4th edition of the OHS Annual Conference. The first ever competition on ‘Best Practices in Safety’ evoked much interest in the industry, with over 50 companies submitting 75 entries.

**Manufacturing Excellence**

Given the significance of manufacturing to India’s sustained growth, CII CME endeavoured to augment the sector’s competitiveness through a number of capacity building programmes. The 5 module intensive programme on manufacturing excellence is designed to trigger mindset change of participants towards taking ownership through a mix of technical, financial, leadership and self-improvement inputs. During the programme, participating managers develop a self-brand and the ability to convince their colleagues to think beyond production to supply chain, finance to new business models for attaining overall growth and competitive advantage for their businesses. Close to 50 managers from 25 companies benefitted from the 5 batches of this programme.

Manufacturing managers require many more skills for efficient production, in addition to the operational knowledge of critical parameters such as cost, quality, productivity and man management. The 27 supervisors and junior managers from 13 companies who underwent three batches of the modular course on Efficient Production Management gained a greater understanding of such skills and foundations.

**Advanced Manufacturing and Industry 4.0**

To stay relevant, Indian industry needs to build capacity to adopt and integrate advanced technologies such as advanced manufacturing and Industry 4.0 as a business strategy. In this backdrop, CII CME undertook a series of initiatives to create awareness and build capacity. Managers from the industry underwent the advanced manufacturing programme aimed at facilitating manufacturing growth by helping them hone their skills in developing manufacturing roadmaps and ability to lead in the dynamic global landscape. The objective is to create the Indian Way of Manufacturing by providing them exposure to next-gen manufacturing technologies and strategies and developing cutting edge tools to compete globally.

A holistic approach to implementation of technologies related to Industry 4.0 was emphasized during the training programme on the subject. The five-day workshop, including two industry visits, provided insights to the participants on how to implement Industry 4.0. In addition, an exclusive workshop with Bosch
India on intelligent manufacturing benefitted over 65 participants from 27 member companies. The two-day workshop, combined with a shop floor visit, helped participants develop knowledge and awareness on smart solutions and Industry 4.0 (I4.0) concepts.

Additive manufacturing, a new advanced technology, is a key pillar of I4.0. At the conference on additive manufacturing, over 110 participants deliberated upon the transformation being prompted by this new technology.

Young Stakeholder Engagement
In an effort to boost manufacturing competitiveness amongst stakeholders, CII CME endeavours to foster a link between the manufacturing sector and the younger generation. One such effort is Anvesh, a premier Manufacturing Quiz. The 3rd edition of the quiz saw participation of 50 teams of final year engineering and MBA students as well as young corporate professionals. The teams from Hero MotoCorp Ltd and Narsee Monjee Institute of Management Studies emerged as winners.

SECTORAL INTEGRATION
Welding Industry
Welding makes a significant contribution to India’s GDP, given its role in welding intensive industries, auxiliary products, complementary goods, employment, and user industries. However, the sector remains largely dominated by smaller players. CII’s Welding Technology Core Group has taken several initiatives to provide training and create awareness. Inter-disciplinary platforms, such as manufacturers, users, researchers, and educators to discuss trends, innovations and practical challenges, were created for welding industry stakeholders. The 3rd Conference on Welding Technology themed Productivity Improvements in Manufacturing/Welding Processes focused on crucial aspects such as digital transformation of welding process technology, future of additive manufacturing and welding and strategies and plans for the success of ‘Make in India’. More than 125 participants from 50 companies participated in the conference.

An exclusive workshop, held in association with the Welding Institute, UK, had 43 participants from 16 organizations interacting on joining technologies for lightweight vehicle bodies.

Jobs and Livelihoods
Given that creating jobs and livelihoods is one of the key challenges facing the country, a workshop on this subject was held in association with the Government of India. Over 250 stakeholders deliberated on how to facilitate job creation and livelihood opportunities in India. Some areas that were explored include the formal and informal economies, entrepreneurship and new age enterprises and skill development for employability. It was also an opportunity to analyze important areas such IR laws and skill gaps. Pursuing job opportunities and employment creation by leveraging related government financial schemes, contract markets and entrepreneurship were discussed as a possible way forward.
CII-SOHRABJI GODREJ GREEN BUSINESS CENTRE

CII-Sohrabji Godrej Green Business Centre (CII-Godrej GBC), established in 2004, is CII’s developmental institute on green practices and businesses, aimed at offering world class advisory services on conservation of natural resources.

The centre’s services include green buildings, energy management, green companies, green product certification, renewable energy and other related areas. CII-Godrej GBC, through its multi-pronged approach, works closely with stakeholders in facilitating India’s emergence as one of the global leaders in green business by 2022. By November 2019, the centre had facilitated reduction of over 16 million tonnes of CO₂ per annum.

**ACTION**

Over the last 15 years, the centre has worked hard to foster and promote ecologically sustainable business growth models. To celebrate the milestone, CII-Godrej GBC organized celebrations around 15 years of national contribution at its campus in Hyderabad. Coinciding with the event, the centre was awarded IGBC’s Net Zero Platinum rating for excellence in energy efficiency and for offsetting annual energy consumption through on-site renewable energy sources.

**Spearheading the Green Building Movement**

Indian Green Building Council (IGBC), operating under the CII umbrella since 2001, has pioneered and spearheaded the green building movement in the country. With a spread of over 7 billion square feet, IGBC has helped India become one of the top 3 countries in terms of registered green building footprint. As on November 2019, over 5,500 green building projects, amounting to over 7 billion square feet, were registered with IGBC for adoption of one of the 25 IGBC green building rating systems. To deliver on its aspiration of taking this footprint to 10 billion square feet by 2022, IGBC added the Nashik and Mangaluru chapters taking the number of local chapters to 27.

**GreenPro Ecolabelling**

The centre has been promoting sustainable production and consumption through Type-1 ecolabelling (based on life cycle approach) in India. GreenPro, a Type-I ecolabel launched in 2015 is accredited by Global Ecolabelling Network (GEN). The label assesses a product by its green...
quotient through a holistic product life cycle framework. It also states the way forward to achieve excellence in environmental performance. In the past 4 years, over 950 products from more than 100 companies have been certified with the ecolabel.

The Green Product (GreenPro) ecolabel standard aimed at enhancing quality and performance of solar PV modules, facilitating supply of credible solar PV products and systems for end users will be released after performance testing by third party laboratories and assessors.

A UN environment study has revealed that the GreenPro ecolabel meets all the 10 principles of providing product sustainability information. During the year, CII Godrej GBC and the Thailand Environment Institute signed a MoU that mutually recognizes the ecolabels of the two countries (GreenPro label for India) and also provides market access to the ecolabel certified products with minimum inspection.

GreenCo Rating
GreenCo rating system, a first of its kind robust evaluation process, rates a company’s environmental performance on ten broad parameters. It also suggests the way forward in resource conservation, energy and environmental management. More than 550 companies working on GreenCo rating are contributing to the national green goals. The first 245 GreenCo rated companies have achieved annual recurring savings of INR 1,257 crores and GHG emission reduction of 1.75 million tonnes CO₂ equivalent.

GreenCo rating has been acknowledged in India’s Nationally Determined Contribution as one of the voluntary initiatives undertaken by Indian industry in addressing climate change concerns. GreenCo Rating was listed by United Nations – International Trade Center (ITC), as a voluntary rating from India promoting sustainability (Sustainability Map). Sustainability Map is an online platform that offers users access to wide-ranging information related to sustainability initiatives and standards, allowing businesses to deploy better sustainability practices in international trade.

Greening of Indian Railways
Over 40 green building projects under Indian Railways and 30 railway stations are already registered with CII-IGBC under various green building rating systems and over 50 workshops/ production units are registered under GreenCo rating system. Taking this partnership for facilitating green initiatives forward, CII and Indian Railways inked a MoU for greening of built environment, net-zero buildings, GreenCo rating, greening of railway stations, energy efficiency, technologies, capacity building and other related areas.

Energy Efficiency
Efforts to promote energy efficiency were driven through the 1,875 detailed energy audits leading to INR 3,000 million being realized in annual energy savings. Apart from large, medium and small companies in almost all sectors of Indian industry, audits were also conducted for companies in Australia, Japan, South Korea, Indonesia, Philippines, various African countries and the Middle East.

Capacity Building of DISCOMs
CII is working with 14 DISCOMs of South India in load research studies; development of DSM action plan; capacity building of DISCOMs and supporting implementation of DSM initiatives.
Accelerating Innovation

The Facility for Low Carbon Technology Deployment (FLCTD), a UNIDO supported project, aims to discover and pilot innovative technologies that could lead to emissions reduction in Indian industry. A corpus of USD 500,000 was awarded for piloting 13 promising innovations identified in the first cycle, including a first-in-the-world waste heat recovery from cement kilns. Another 17 innovations have been identified in the recently concluded second cycle.

CII, in partnership with Swedish Energy Agency and Business Sweden, has been working on the India-Sweden Innovations Accelerator Programme since 2013. Over the years, about 50 Swedish companies have been introduced to India with a view to transfer innovative clean technologies and solutions from Sweden to India. Nearly 500 Indian companies have participated in this initiative.

Powering India’s Green Energy

Efforts were made at scaling up the renewable energy market in India, through the Green Power Market Development Initiative. Over 450 companies were engaged, and 650 MW of green energy was facilitated as part of the Green Power Market Development Group (GPMDG). Under the initiative, MoUs were signed with real estate developers’ associations, universities, and government departments.

Facilitating Energy Efficiency in MSMEs

Over 4,500 MSMEs have benefitted from multiple projects, covering multiple components, including resource efficiency studies, implementation support, training programmes and finance facilitation, being delivered with support from BEE, EU, UNIDO and World Bank. The resultant investments of almost INR 1,350 million in energy efficiency have also led to lifetime emission reduction of 1.3 million tonnes of CO₂.

MoEFCC is planning a pilot project based on a draft CII report on the roadmap and action plan for implementation of Market-Based Mechanism (MBM) for greenhouse gas emission reduction in MSMEs.

Accelerating Deployment of Renewable Energy (ADORE), a unique membership driven initiative, was launched to facilitate commercial and industrial energy users to meet their RPOs and clean energy targets.

The Green Product (GreenPro) ecolabel standard aimed at enhancing quality and performance of solar PV modules, facilitating supply of credible solar PV products and systems for end users, will be released after performance testing by third party laboratories and assessors.

Recognizing Excellence

The 2nd edition of the Performance Excellence Awards 2019 recognized excellence in solar and wind plant operations and disseminated the best practices followed in the O&M of these plants. The top 8 performers (6 solar and 2 wind plants) were awarded with ‘Leadership in Performance’, and the next 8 best performers (5 solar and 3 wind plants) were awarded with ‘Excellence in Performance’.

At the 20th National Award for Excellence in Energy Management, 69 companies received Excellent Energy Efficient Unit award, 91 companies were given Energy Efficient Unit award, 18 companies received National Energy Leader award and 4 professionals were recognized as Young and Emerging Leaders.
In a dynamic business environment, characterised by technology driven disruptions in business processes and disruptive start-ups, first generation entrepreneurs and family run enterprises, grooming the incumbent and future leadership is a top priority for the ‘New India’. It is a key step to build organizations that contribute to the nation’s growth agenda. In this ‘New India’, the CII-Suresh Neotia Centre of Excellence for Leadership (CII-SNCEL) envisages for itself a significant role in capacity building across businesses and socio-cultural segments through a multitude of both traditional and digital interventions focusing on ‘people’ and ‘process’ transformations. The Centre also seeks to catalyze the generation and contribution of new leadership thoughts through a diverse range of platforms and forums and is striving to become a hub of leadership development and excellence.

TRAINING AND CAPACITY BUILDING

Long Duration Certification Programmes

People Transformation - Towards Creating a Leadership Pipeline

Young Leadership Development Digital Programme

The 4th Young Leadership Development Digital Programme (YLDP), designed to impart leadership and management skills in cross functional areas to high potential young leaders, deployed a unique two way interactive, real-time learning platform. The four month programme, spanning over 100 hours, enabled over 50 young leaders to interact with domain experts while balancing their learning and development needs with work related demands. A robust and continuous assessment process helped organizations obtain an independent assessment of their participants’ ability to imbibe new skills for leadership roles.

Certified Online Programme on People Analytics

This Futuristic HR Management programme was designed to impart in-depth knowledge on data-driven analysis to the HR fraternity. A unique 2-way interactive, real-time learning platform along with live faculty interaction equipped participating executives with skills required to apply analytics in HR, drive better business results and help organizations create a future leadership pipeline. The programme featured a distinctive combination of both theoretical and practical implementation, spanning over 40 hours and 4 modules.

Process Transformations - Towards Achieving a Healthy Bottomline at Optimal Costs

The CII-SNCEL Goldratt TOC Holistic Management Programme

The Centre, in collaboration with the Goldratt School, USA, organized the 4th edition of the TOC Holistic Management Programme in Kolkata on ‘The Theory of Constraints’ (TOC). TOC as a methodology has been very successful in giving a thrust to breakthrough performance with small budgets. Held for the third year in a row, this classroom based training programme was conducted through a six-module integrated curriculum, wherein participating CXOs, senior level managers and functional heads gained in-depth understanding of TOC. The learning was enhanced by the real life projects undertaken by participants after every module.
MASTERCLASSES

Understanding Mind Maps

As the key proponent of the acclaimed thinking technique called ‘Mind Mapping’, Professor Anthony Peter Buzan steered participants through a daylong Masterclass in Mumbai. The day focused on proven techniques designed to enable critical thinking in finding solutions to leadership and business challenges. Participants simulated intensive decision making scenarios and assimilated strategies designed to optimally leverage the true potential of the human mind and enhance individual effectiveness. The Masterclass featured participants from a wide range of industries.

Winning in the Digital Revolution

The advent of intelligent programmes, coupled with rapid evolution in digital technologies and emergence of artificial intelligence, is threatening to outperform human capabilities. Given the urgent need for structured learning on the matter, the Centre organized two Masterclasses in Mumbai and Bengaluru, conducted by Prof Soumitra Dutta, Professor of Management and former Founding Dean of the SC Johnson College of Business at Cornell University. On the theme of Digital Transformation for Business Success: A Strategic Roadmap, Professor Dutta shared a proven action oriented framework for implementing breakthrough strategies for success in the digital era. Over 100 participating executives also assimilated proven approaches of leveraging digitalization of products and services to build a successful ecosystem using platform business models.

Building Brand Experiences

Under the 3-part web based Thought Leadership Masterclass series, participants crafted effective and relevant brand experiences that help improve brand engagement and drive results. Led by Dr Darren Coleman, Founder and Managing Consultant, Wavelength Marketing (UK), the series was designed to be particularly relevant in an environment where organizations frequently respond to competitive threats with product or price-based strategies that fail to build long-term brand relevance. The Brand Experience Blueprint, a proven and extensively validated management roadmap, enabled participating executives, representing over 30 organizations, assimilate critical elements in retaining long term brand relevance.

Technology and Business Model Disruptions

The advent of cloud computing, data analytics and artificial intelligence has resulted in emerging challenges as well as potential opportunities for organizations across sectors. Given the urgent need for business leaders to rethink and reinvent existing business models, a Masterclass on Technology and Business Model Disruptions was organized in Mumbai by Prof Sameer Hasija, Professor and Chair, Technology and Operations Management, INSEAD.
Disruption provided key insights to participants. Prof Sameer Hasija, Professor and Chair, Technology and Operations Management, INSEAD elucidated the critical drivers of business growth, innovation and sustainability to help participants better prepare for emerging disruptions. The Masterclass was attended by senior executives representing a diverse range of organizations.

FUNCTIONAL LEADERSHIP
3rd Marketing Leadership Summit
Return on Attention: Winning Consumers in the Ephemeral Age
Consumers now spend only a fraction of time on any given marketing message due to decreasing attention spans, and marketing initiatives need to break through this wall of noise to ensure brand visibility. Building on the Centre’s core agenda to enhance digital capability, the 3rd Marketing Leadership Summit focused on the ‘Return on Attention: Winning Consumers in the Ephemeral Age’. The summit witnessed a gathering of over 200 business and marketing leaders who interacted with a host of eminent speakers and thought leaders. In the context of transformative developments in communication technologies, the summit deliberated upon robust strategies and concepts such as shorter content formats, front-loading marketing messages with calls-to-action and innovative media formats that are designed to grab consumer attention.

Leadership Dialogue Series
Redefining India’s Leadership Aspirations
As one of the most promising global economies, capable leadership will be instrumental in tackling emerging challenges and propelling India on a higher growth trajectory. To deliberate on the roadmap ahead, a Leadership Dialogue Series was instituted in Kolkata on the theme ‘Global Slowdown and its Impact on India’s Leadership Aspirations’. Luminaries discussed the emerging challenges confronting policymakers in a business scenario characterized by sluggish growth, and the broad strategies to increase the growth momentum by leveraging India’s unique attributes of a younger population, home-grown entrepreneurship and a robust culture of innovation.
Cognizant of the growing water challenge, CII’s centre of excellence on water issues, CII-Triveni Water Institute, engages with stakeholders for enabling water security in the country. It addresses water related issues in a holistic manner and focuses on changing stakeholder mindsets and behaviour. Its unique services use innovative state-of-the-art digital analytic tools and frameworks -

• Customized and integrated solutions
  - Water risk evaluation and planning through WATSCAN
  - Water audits across industry, municipalities and buildings
• Competitiveness
  - Water smart rating through WatSmart
  - Benchmarking and baselines for improving water use efficiency
• Outreach
  - Recognizing companies for water management initiatives
  - Stakeholder sensitization on water use efficiency through focused events
• Grassroots intervention
  - Evidence based implementation of appropriate water management strategies
• Policy advocacy
  - Facilitating policy frameworks for treated wastewater; promoting new modes of financing for implementing PPP projects
  - Interfacing municipality and industry; municipality and agriculture.

**ADVOCACY**

**Guidelines for Optimization of Water Usage in Coal Based Thermal Power Plants**

The Institute undertook a study for the Excellence Enhancement Centre (an initiative under Indo-German energy cooperation) to develop guidelines for optimization of water usage while minimizing wastewater discharge for four coal-based thermal power plants across India.

The research also suggested potential areas for reducing water consumption, recycling and reuse at other coal-based thermal power plants. Adhering to the 3 ‘Rs’ concept of reduce, reuse and recycle at a macro-level, the guidelines suggest comprehensive, holistic and sustainable water resource management in coal-based thermal power plants.
WATSCAN: Drought Proofing with Digital Water Solutions

An integrated IT driven, GIS based tool for water resource evaluation, CII’s WATSCAN is applicable across scales from villages to river basins. With over 50 WATSCAN applications across geographies covering about 10% of India’s geographical area, 4 billion litres of water have been saved by implementing area specific strategies.

The Institute is working on assessment and implementation of appropriate water management strategies through a combination of demand and supply side measures in 4 drought prone villages of Aurangabad district. The initiative, supported by Standard Chartered Bank, involves in-depth scientific assessment for strategizing water solutions. Evidence based implementation work completed successfully includes awareness generation across the community and rejuvenation and construction of various water infrastructure facilities like gabion bunds, check dams, recharge and rainwater harvesting systems.

Low risk, less water intensive livelihood options, with potential to scale up farmer incomes, are now being implemented. The diversified livelihoods include sericulture, a multi-cycle ‘crop’ low on production risks. With training and supervision, it has the potential to increase farmer income by 2-3 times against traditional cropping practices.

Evaporation control is being driven through promotion of ‘shade nets’. These benefit farmers by creating a controlled environment and optimizing water usage.

With supply side measures led by CII, village Paithan Kheda’s water supply increased by 1500-1700 cu.m/ha. Similarly, with demand side interventions, water demand reduced by 2300-2500 cu.m/ha. The farm level water demand-supply gap has been bridged and groundwater in the village has shown signs of stabilization while water tables have recorded improvement, taking the villages towards water security. Potential water availability has increased the interest in farming and prevented distress selling of farm land in these villages. With the project helping villages’ progress from Resilience to Transformation, it is now being scaled upto another 20 villages in Aurangabad and Solapur.

The Institute’s comprehensive assessment of water resource availability, risks and opportunities in the Subarnrekha basin revealed that with the land use in the basin being governed by deforestation, agricultural expansion, and urbanization, it has led to several ecological problems. Appropriate water conservation and management strategies for enabling improved water availability in the area were identified through the WATSCAN application.

Water Audits: What Gets Measured, Gets Managed

CII’s comprehensive water audits across sectors, guide industry in ascertaining options for reducing water usage, minimizing wastewater generation and maximizing recovery. The Institute’s experienced teams include analytical design and engineering experts to work through the audit process and examine solutions for better water management.
The potential annual water savings from over 200 water audits undertaken by the Institute till date are estimated at about 200 billion litres, equivalent to supplying freshwater to the entire rural population of India for two days.

The Institute undertook detailed water audits, covering chlor alkali, fertilizer, ferrous & non-ferrous (integrated plants), pulp & paper, textiles, petrochemical, oil refineries, thermal power plants, automobile, power, cement, sugar, paint, airport, hotels (large), pharmaceuticals, distilleries (alcoholic beverages), mines, engineering, cigarettes, buildings, food & food processing, FMCG, tyre manufacturing, potable alcohol blending and non-alcoholic beverages (soft drinks).

KNOWLEDGE SHARING

Water Innovation Summit

The Institute continued its endeavour to leverage knowledge and develop innovative scalable approaches for an improved water scenario in the country. Efforts were accelerated during the year through documentation of learnings and encouraging industry to share their case studies. The 5th Water Innovation summit, organized in partnership with the Ministry of Jal Shakti and Australia as a partner country, was yet another step in this direction.

While the industry shared their best practices through case study presentations, Dr Reddy’s Laboratories agreed to support the water conservation movement by signing an MoU for undertaking Water Risk Evaluation studies across their plants. Key projects and audits undertaken by the Water Institute, the geographical areas of WATSCAN application and the basket of interventions were highlighted at the unique experience zone.

A digital interface communicated the benefits accrued to the industry through their water conservation efforts. It highlighted some of the key projects and audits undertaken by CII-Triveni Water Institute across the country where it has applied the WATSCAN tool and the interventions identified for these areas.

CII National Awards For Excellence In Water Management

Over the last few years, several Indian companies have reaped immense benefits by implementing water management practices both within and beyond the fence. These efforts have resulted in overall watershed improvement, apart from impacting the company’s bottomline. These companies were recognized by the institute after a rigorous 3 stage evaluation process that included ground verification and evaluation. Of these, 39 innovative and scalable good water and wastewater management practices were conferred the National Awards for Excellence in Water Management.

Industry Visit: Water Mission

Taking forward one of the important recommendations of the ‘Pulp & Paper Water Missions’, CII Water Institute organized a 15-member water mission to ITC’s Bhadrachalam unit. Master classes were also organized on aspects related to advanced and innovative technologies, followed by dissemination of best practices; strategies to reduce specific water consumption and recycling/reusing treated wastewater.

From L to R: N K Ranganath, Member of Jury, CII National Awards for Excellence in Water Management; Karlene Maywald, Former Minister and Chair, National Water Commission, and International Adviser, South Australian Government; U P Singh, Secretary, Ministry of Jal Shakti, Department of Water Resources, River Development & Ganga Rejuvenation; Dhruv M Sawhney, Past President, CII and Chairman, CII-TWI and Chairman & MD, Triveni Engineering & Industries Ltd and Chandrakant Banerjee, Director General, CII at the 5th Water Innovation Summit in New Delhi
The CII-Jubilant Bhartia Food and Agriculture Centre of Excellence (FACE) is charged with the mission to improve competitiveness of India’s agriculture and food processing sector, by catalyzing innovation, building capacity and enhancing productivity across the agriculture and food value chain, ensuring food security and inclusive growth. In the years since its inception, FACE has established itself as a credible knowledge resource in the agriculture and food domain.

**RESEARCH AND POLICY**

Some key studies arising out of FACE’s engagement in policy research, analysis, programme evaluation and impact studies include:

- Evaluation of Custom Hiring Center (CHC) models towards drawing a comprehensive framework for guiding CHC implementation in the country
- Study on ease of setting up a cold chain with the intent to identify operational hindrances faced by an investor. A quantitative survey of over 100 cold store owners was undertaken in six states - Andhra Pradesh, Gujarat, Haryana, Himachal Pradesh, Maharashtra and West Bengal. Best practices are proposed to overcome aberrations identified through the survey. These include change in land usage, differential electricity tariffs, fire safety norms and building norms
- An assessment of the fisheries supply chain was undertaken in Vishakhapatnam, Krishna, West Godavari and East Godavari districts of Andhra Pradesh. Based on the gaps identified in both marine and inland supply chains, a way forward was suggested for optimally linking the Southern market with consumption centres in north India. Cold chain interventions such as storage infrastructure, packaging technology and use of reefer transport emerged as the key areas of focus for strengthening the marine and fisheries supply chain. Implementing key learnings from the study, as a pilot it is proposed to transport a truck of fresh catch from Machillipatnam to Delhi, to measure the impact on losses and price realization.

**PROJECTS**

To overcome the challenges faced by FPOs regarding long term hand holding, a FPO Business Service Unit was launched. The Unit is aimed at developing sustainable business plans for selected FPOs. In Phase I, launched in Uttarakhand, 1,500 women members of a FPO, benefited through interactive trainings on post-harvest value addition and marketing as well as B2B meetings.
for market linkages. The plan is to scale the initiative pan-India.

A holistic supply chain model, using multimodal transport, is being developed under the Green Logistics corridor project for the southern states of the country viz Andhra Pradesh, Karnataka, Telangana, Kerala and Tamil Nadu.

CII has institutionalized the Farmer Industry Alliance, a stakeholder-led and stakeholder-driven initiative aimed at training FPO/FPC and building scale, market access as well as sustainability. Under the pilots launched in Maharashtra, the alliance is developing and disseminating a package of practices for soya bean and tomato, undertaking field trials to record impact and fostering buyback arrangements.

**TRAINING AND CAPACITY BUILDING**

In an endeavour to build capacity in the food ecosystem, 40 CIIF - Mission Health - FACE food safety clusters were set up in high impact sectors across 25 locations in 15 states. With over 13,000 food handlers and supervisors trained in food safety and handheld in improving practices, more than 2.4 crores meals are being impacted annually.

Over 8,500 participants in 110 locations have till date undergone Food Safety and Standards Authority of India’s (FSSAI) Certification programme.

The certificate courses on Vulnerability Assessment & Critical Control Point (VACCP), Threat Assessment & Critical Control Point (TACCP) and Mitigation Techniques for Food Fraud, Food Defence & Food Safety were organized in Delhi, Mumbai and Bengaluru.

A Webinar on ISO 22000: 2018 was also introduced to help strategy and operations professionals from the food sector upgrade their knowledge and skills.

**Promoting the Science behind Food Safety**

The CII-HUL Initiative on Food Safety Sciences (CHIFSS), in partnership with FSSAI, launched an effort to strengthen risk-based approaches in food safety evaluation of novel foods and additives. A guidance document on microbiological process control, sampling, and testing for poultry and a training package on fish and fish products were also released under the CHIFSS umbrella. The 6th Stakeholder Forum on Scientific Advances continued the dialogue on food safety and security.

**CII-IADSA Resource Centre for Health Supplements & Nutraceuticals (ReCHaN)**

ReCHaN, a partnership between CII and the International Alliance of Dietary/Food Supplement Associations (IADSA), initiated a series of scientific dialogues on international best practices through stakeholder forums on the science of supplementation and on evolving a

Panel discussion on Scientific Advances in Food Safety and Food Security - How to integrate this into practice, during the CHIFSS Stakeholder Forum in New Delhi. From L to R: Paul Hepburn, Programme Director, Food & Refreshment Safety & Environmental Assurance Centre (SEAC), Unilever, United Kingdom; Satyanarayana K V, Associate Vice President, Life Sciences Advisory Group of Satguru Management Consultants; Shannon Olsson, Head, NICE Group, NCBS; Alok Dhawan, Director, CSIR, ITR; Debabrata Kanungo, Former Additional Director General, Health Services, Ministry of Health and Family Welfare and Nimish Shah, Director, SEAC, HUL

A Webinar on ISO 22000: 2018 was also introduced to help strategy and operations professionals from the food sector upgrade their knowledge and skills.

Panel on Nutraceuticals and Advisor Ayurveda (Retd), Ministry of AYUSH and Dr Joseph Lewis, Scientific Advisor, ReCHaN

Release of the training package on Awareness on Health Supplements & Nutraceuticals for Pharmacists & Retailers in New Delhi. From L to R: Michelle Stout, Regulatory Policy Director, Amway; Meetu Kapur, Executive Director, CIIF-FACE; Simon Pettman, Executive Director, IADSA; Pawan Aggarwal, the then CEO, FSSAI; Dr S K Sharma, Chairperson, FSSAI Panel on Nutraceuticals and Advisor Ayurveda (Retd), Ministry of AYUSH and Dr Joseph Lewis, Scientific Advisor, ReCHaN
health supplements and nutraceuticals ecosystem. A series of capacity building workshops were conducted for pharmacists and retailers based on training packages developed on health supplements and nutraceuticals. The first training of trainers workshop on Food Safety Management Systems (FSMS) for Health Supplements & Nutraceuticals was facilitated under FSSAI’s FoSTaC.

**Centre for Safe and Responsible Alcohol Consumption (CeSRAC)**

The centre, set up in partnership with International Spirits and Wines Association of India (ISWAI), will endeavour to establish a regime that embodies the principles of food safety sciences and is positioned on risk-based food safety approaches for alcoholic beverages.

**PROMOTING A CULTURE OF EXCELLENCE**

The Food Safety Award, that worked to stimulate best in class food safety and quality practices, saw 10 food business units from 9 sectors getting the trophy for outstanding performance.

The 4th edition of the Cold Chain Awards, held in New Delhi in partnership with NCCD, also witnessed significant growth in the number of applications across categories and regions over the last 3 years.

**LEVERAGING TECHNOLOGY TO TRANSFORM AGRICULTURE**

FACE launched the Network of Agri-startups, Venture financiers and Incubators (NAVI) platform to facilitate handholding for innovators, entrepreneurs and start-ups by providing them an opportunity to showcase their technology, mobilize funding and secure potential incubation opportunities and ongoing industry mentoring. 80+ AgTech ventures are registered on the NAVI platform, with active engagement underway with 20+ ventures for facilitation of funding, pilots, incubation, and mentoring.

Furthering its agenda on technology led agricultural transformation, FACE worked on significant initiatives around engaging youth, catalysing start-ups and bringing technology and innovation to the forefront under its Advanced Technology Programme.

At the AgHack 2019, India’s first virtual agri-hackathon, students and professionals tried to solve issues hindering the growth of India’s agricultural sector. AgWarriors, the winning team, from International Institute of Information Technology (IIIT), Hyderabad developed a machine learning based android application for ‘Uberfication of Agricultural Marketing’.

During the Global Dialogue on Digital Pathways in Agriculture, stakeholders deliberated upon the latest developments in the AgTech space. AgTIVE 2019 (Ag-Tech Innovations for Viable Enterprise), a reference knowledge document comprising more than 35 case studies of AgTech ventures was also launched on the occasion. The growth trajectory of data analytics, mechanization and automation, post-harvest and value chain management vis-à-vis agriculture are captured in the document.

FIB-SOL Life Technologies, an agri-biotech start-up, won the 2019 edition of AgLive 2019 – Innovator’s Pitch. InteliTex solutions, the runners-up, won accolades for their blockchain based agri-supply chain track and trace system.
Thirteen years ago, CII embarked on a journey to build a pool of visionary leaders skilled to drive India’s aspirational manufacturing growth target. The Champions of Societal Manufacturing (CSM) programme, widely recognized as the Visionary Leaders for Manufacturing (VLFM), has transformed managers across levels, including top management to trigger a tectonic shift in the industry and define the way manufacturing breakthroughs are achieved. VLFM/CSM has contributed to India’s manufacturing growth, through its community of over 5,800 visionary leaders from the manufacturing sector, developed through a series of programmes under its umbrella.

ADVOCACY
The VLFM/CSM initiative, being spearheaded by CII, continues to be implemented under the aegis of the Government of India, (Department for Promotion of Industry and Internal Trade and Ministry of Human Resource and Development). Japan International Cooperation Agency (JICA) is the implementation partner representing the Government of Japan. A unique co-operation project between India and Japan, it is contributing to the Government of India’s strategic initiatives such as Make in India, Skill India, Startup India and Digital India. The VLFM/CSM initiative is inspired by Late Dr APJ Abdul Kalam, Former President of India and Padma Shri (2012) Prof Shoji Shiba’s vision, passion and dedication.

More than 250 success stories documented over the last 13 years showcase the positive impact made by VLFM/CSM programme on both large manufacturing companies as well as SMEs. Breakthrough results spread across operations, new product development, people management, day to day jobs, and new business development, demonstrate the uniqueness of this programme.

Going forward, the VLFM/CSM project, with leadership and guidance of key stakeholders in government, academia and industry, will expand to build Sustainable Global Business Breakthrough EcoSystems (SGBBE, 2020-2025) with a focus on strategic thrust areas. This new project is built on the strong partnership and decade long successful engagement of stakeholders.

ACTION
Keeping manufacturing growth at its core, the initiative has reached out to the 25 champion sectors that have the potential to drive India’s manufacturing growth as well as exports. The various programmes under the VLFM/CSM umbrella have expanded over the last 13 years to drive this objective.

JICA officials and faculty members from Japan with Prof Shoji Shiba during Self Initiated Research (SIR) session of the Senior Manager’s Programme in Tokyo
Gurukuls Programme

The PGPEX-VLFM programme continued to be delivered in partnership with NITIE and IIT (Delhi). The high impact, short duration courses in the Gurukul format were delivered based on the learn-apply-learn principle. The three Gurukuls, addressing the industry’s requirement for young leaders, focused on breakthrough management, co-creation and new business development process. The highly experienced faculty was drawn from Godrej & Boyce and CII experts.

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Senior Managers’ Programme

The one year Senior Managers’ programme follows a modular approach, with five integrated modules of five days each and a week long Japan study visit. The 72 participants of Batch 12 of this premium offering of VLFM/CSM, visited Mitsubishi Electric Corporation, Toyota and Fanuc plants in Japan. The learning experience was enhanced by visits to museums such as TEPIA, Yokkaichi Pollution and Environmental Museum for Future Awareness and the Toyota Museum. This flagship programme continued to expand during the year, with 67 participants from 32 companies enrolling for Batch 13 (2019-20).

- Sectors represented include auto components, auto OEMs, capital goods, consumer durables, construction, domestic appliances, engineering, machine tools, printing, steel and textiles
- Average work experience of 22 years, comprised of senior managers (61%), top management (11%) and middle management (28%)

Total Participants - VLFM Gurukul Programme (2017-2020)

VSME Programme

During the year, a VSME programme was initiated for students of PGPEX-VLM programme at IIT Madras, with support from Lucas TVS. Delivered as a three-day Gurukul on Flow Management with certified VSME experts and industry support, the programme was highly appreciated.

With a view to further benefiting manufacturing companies, scope of VSME was expanded to include new areas of work, new subjects, and new content with global subject matter experts (through JICA’s assistance) and CII experts.

The three pilot projects, one each in an OEM, a Tier 1 company and a non-automotive company, were kicked off under the expanded VSME umbrella. An integrated project, it comprises of Toyota Production System and Internet of Things with Artificial Intelligence.

VLFM Community Engagement

Leaders from the VLFM community came together to learn from each other at the 13th Learning Convention, titled ‘VLFM Sanskriti- Building Future Ready Organizations’.

The graduating batch of VLFM Senior Managers Programme (Batch 12, 2018-19) took the ‘Sankalp’ to lead India’s manufacturing sector to newer heights along with another 200 leaders from government, industry and academia.

The 3rd VLFM Summit was aptly titled Building Sustainable Global Business Breakthrough Ecosystems, as industry leaders and VLFM alumni shared their journeys and experiences in building ecosystems to nurture manufacturing growth and inspire business leaders towards achieving the national vision.

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Globally, the business landscape is undergoing rapid changes, led by digital technologies that are transforming the way systems and processes work. In this scenario, organizations at different stages of the digital curve are being forced to rethink their processes and systems and deal with challenges like limited budgets and lack of expertise for adopting digital technologies.

To help Indian enterprises leverage the technology changes and become globally competitive, the CII Centre for Digital Transformation (CDT) works with a mission to enhance competitiveness of Indian industry. It works to evolve and leverage a digital transformation movement that transforms India by building systems of intelligence, bringing in more personal computing, helping organizations adopt the intelligent cloud and reinvent their productivity and business processes, thereby enhancing their effectiveness and inclusive growth.

The centre, in principal partnership with Tata Communications Ltd and associate partnership with Dell Technologies, is further building its partner ecosystem through various providers joining hands in driving its vision, including skill building, cyber security programmes.

**ADVOCACY**

**Assessment and Advisory**

As a run-up to the interim online Digital Maturity Appraisal, the centre’s assisted Digital Maturity Assessment module was launched at the CII Annual Session 2019. Through this module, the centre aims to sense industry expectations and also the key priority areas to be discussed. It also evaluates areas of improvement towards building digital strength and identifies opportunities for organizations to build competitive advantage in their offerings through digital transformation of business.

**Training and Development**

Continuous skilling and reskilling is defined as an essential element to equip workforce with new trends and technologies for successful business transformation. A series of training programmes helped build capacity in cyber security and latest technologies.
Awards and Recognitions

The centre’s inaugural awards programme, DX Awards 2019, was an opportunity to share best practices followed by corporates in achieving business innovations digitally and also calibrating the benchmark data. Out of over 100 submissions, 17 organizations received the DX trophy for Best Practices in Digital Transformation in the ‘Most Innovative’ and ‘Innovative’ categories.

ACTION

Creating awareness is a significant step in building a successful movement of any kind. With a mission to evolve a digital movement in India, CDT created awareness through a series of workshops, conferences and seminars. The 1st edition of the DX Summit and awards, held in New Delhi, was aimed at encouraging information exchange amongst Indian companies to help them learn from each other, get motivated to transform digitally and spread digital technologies.

The summit featured the launch of DXcel – Digital Transformation Excellence Model - a unique tool, which will enable mapping of various companies’ position on the digital transformation journey.

Through the DX Signature Movement, also held during the Summit, signatories pledged to follow the seven commandments under the CII Code for Digital Transformation.

CII Code for Digital Transformation

1. Adopt digital technology and innovation in all spheres of activity
2. Improve digital literacy across the organization amongst all stakeholders
3. Make data and insights the key decision enabler
4. Maximize use of digital technology for conservation of natural resources
5. Respect privacy on all digital platforms
6. Engage digital tools to improve productivity by at least 5% every year
7. Incorporate digital transformation to upgrade the business model to generate new products and services.
Check dam constructed by CII-Triveni Water Institute and CII Foundation supported by Standard Chartered Bank, in Paithan Kheda village, Aurangabad district, Maharashtra. The location of the intervention is identified scientifically through the application of CII’s WATSCAN Tool, as an appropriate water management strategy in drought affected areas.
Volunteers representing Pune-based member companies at the CII Pune Traffic Volunteering Initiative 2020
While India’s youth continue to drive the country’s socio-economic growth, the current demographic mix, with a significant youth bulge, requires creation of sustainable livelihood opportunities and promotion of entrepreneurship with a sharp focus on emerging job roles. In this backdrop, CII impacts over one million youth annually through its skill development and livelihood initiatives. The endeavour is to ensure a skills ecosystem that addresses the existing industry requirements as well as includes a framework for continuous reskilling and upskilling.

With a strong emphasis on co-action, collaboration and partnership, the CII National Committee on Skill Development and Livelihood works closely with the government towards creation of a robust policy framework to further the Skill India agenda. CII draws on a strategic 360 degree approach encompassing policy advocacy, research and thought leadership, on-ground activation and creation of international opportunities to drive global employment linkages for Indian youth.

The gap between availability of employable youth and their employability or industry relevance, a key challenge facing the Indian industry, is addressed through on-ground initiatives. The aim is to build the industry’s competitiveness, with a productive workforce. These skill development initiatives are strengthened by linking job seekers to employment opportunities through the Model Career Centres, thus making a significant social impact.

With both the developed and developing economies facing the twin challenges of technological disruption and an ageing demography, India stands in a strategic position. This position can be capitalized by building a globally-relevant skilled talent pool, being addressed through the international skill engagements.

**ADVOCACY**

Several of the policy and pre-budget recommendations submitted to the Ministry of Skill Development & Entrepreneurship (MSDE) and NITI Aayog were considered and enacted. Some of these included introduction of skill vouchers, embedding higher weightage for hiring certified manpower in government contracts, focus on international mobility and placements, scaling up Vocational Education Training.
(VET) in schools and Labour Market Information System (LMIS). A focused approach to high growth and labour-intensive sectors, tax rebates for new certified and skilled hires and placing the apprenticeship programme under a nodal ministry were also recommended.

To give a fillip to the Skill India Mission, 11 Sector Skill Councils (SSCs) were incubated. These SSCs lay down standards and curriculum and most importantly map the demand.

Research

The 7th edition of the India Skills Report, 2020, prepared in partnership with Wheebox and Peoplestrong was released during the year. Based on responses of over 3 lakh aspiring youth from 3,500 educational institutes across 28 states, 9 union territories and over 150 employers, it captures the employability of the youth entering the workforce. The data helps government and key stakeholders address the needs of the job market.

The report has revealed that only 46% of the youth are employable, with MBAs having the highest employability score of 54%. Moreover, women emerged equal to their male counterparts on employability quotient. It has also highlighted the need for enhancing awareness related to government schemes on apprenticeships. On the demand side, the hiring outlook appeared to be positive with almost 56% employers likely to increase hiring. Candidates with 1-5 years of experience continue to remain in maximum demand and employers seem to emphasize domain knowledge, adaptability to the environment, learning agility and positive attitude.

ACTION

With 49 Model Career Centers operational across India and 29 YES Kendras in Karnataka, CII is making a deep social impact, while meeting the industry’s manpower requirements. The MCCs have imparted career counselling to over 4.21 lakh youth and provided employment to 1.35 lakh job seekers. An additional 27 MCCs are under establishment in the aspirational districts in partnership with NITI Aayog.

The Multi Skill Institutes (MSTI) initiative was scaled up based on the success of the one in Chhindwara, and
is making an impact through industry-led training and placement. In addition, the rural skill gurukuls, set up in partnership with PanIIT Alumni Reach For India (PARFI), continued to operate on a unique self-sustainable model with 100% placement.

The close industry connects were leveraged for skilling and placement on a recruit-train-deploy model. This model has gained traction both with the state governments looking for an employment solution and industry that is keen to optimize hiring costs. Extensive efforts were made towards upgradation through industry linkage and capacity building.

As the first Third Party Assessing Body, approved by DGE&T, Ministry of Labour & Employment, capacities have been built with support from CII Institute of Quality, to ensure quality adherence. The unique industry sourced certified assessors undertake more than 2 lakh assessments every year. Corporate CSR skill development projects are delivered through 46 centres, with a focus on training, placement and self-employment of underprivileged youth and school dropouts.

Aspiration for obtaining skills is driven amongst the youth through the Regional and National WorkSkill Competitions. The 31st National WorkSkill Competition was held in Bengaluru, with approximately 850 competitors from 72 companies and training institutes participating in over 28 trades. CII also led a 64-member business delegation to the 2019 WorldSkills Competition held in Kazan, Russia.

The Amended Apprenticeship Act was scaled up through sensitization programmes delivered in partnership with MSDE and NSDC. The skill connect roadshows conducted across 27 cities, in partnership with GIZ and NSDC, promoted apprenticeship, especially in MSME sector.

The CII-MSDE Industry Interaction held during the Culmination Ceremony of Apprenticeship Pakhwada Programme witnessed the signing of a MoU with MSDE to facilitate hiring of 50,000 apprentices in member companies.


**International Engagements**

The Indo-Japan Technical Intern Training Programme (TITP) was anchored in partnership with Nihon Technologies. After imparting Japanese language training, 121 interns were sent for internship to companies in Japan. The Ecole Hôtelière de Lausanne (EHL) Switzerland, the certified hospitality vocational training, was rolled out in India. These centres will be launched in active engagement with state governments and industry.
The CII FBN India Chapter builds a community that brings together family business leaders who can learn from, share with and inspire each other in a variety of formal and informal settings. Efforts are directed at enabling members to thrive and transform across generations, build a more sustainable future for themselves and push their boundaries not just in India but globally as well.

**ADVOCACY**

- Provides a platform for family business leaders to engage with international faculty, external consultants and subject matter experts to set the ground for change management
- Aims to raise awareness and importance of family business models in society, empower the family business and take them on the journey of sustainability through programmes such as Polaris
- Promotes leadership development programmes and enhances knowledge sharing through communities such as Next Generation, Now Generation, Entrepreneurs, Large Families and Family Offices.

**ACTION**

At the 30th edition of FBN Global Summit, organized in collaboration with FBN International, discussions revolved around how business leaders are mastering these self-contradictory tensions inherent to family businesses, to successfully marry the competence of the corporation with the soul of the family.

A 15 member delegation from some of India’s largest family businesses got an opportunity to learn the best practices adopted by Japanese family businesses during a visit to Japan. They also interacted with business leaders and visited the facilities of several Japanese family businesses like the Yazaki Corporation; Toraya Group; Brooks Group; Hollywood Cosmetics and Takanashai Group.

The 19th edition of the Annual International Convention on Family Business was themed Effective Family Business Governance For Building a Resilient Entrepreneurial Legacy. Owners of family businesses from across the country gained actionable insights on planning for a smooth transition of their businesses. Real-life examples of what separates success stories from failures and perspectives on family governance structures, family gravity and cross generational dialogues provided business leaders with the resources to cope with their challenges.

Ajay Shriram, Past President, CII & Chairman, CII FBN India Chapter and Chairman & Senior MD, DCM Shriram; Farhad Forbes, Chairman of Board, FBN International and Co-Chairman, Forbes Marshall Pvt Ltd and other dignitaries at the CII FBN 30th Global Summit 2019 in Udaipur
India’s MSME sector is the backbone of the national economy, with around 63.4 million establishments across the country, employing 117 million people, as corroborated by the 73rd round of the NSS survey. Their increasing contribution to GDP over the years and improved global presence stands testimony to the sector’s growth and its potential to improve both the GDP as well as the Human Development Index.

CII envisions real-time solutions to issues impeding MSME growth by constantly engaging with the government and charting roadmaps for enhancing MSME competitiveness. Specific CII services such as Finance Facilitation Centre, Technology Facilitation Centre and Trade Facilitation Centres, address the challenges of finance, technological innovation and reinvigorate supply chains amongst others.

ADVOCACY

The CII National MSME Council worked with policymakers to outline strategies to address identified issues for building a sustainable ecosystem for MSME growth. Core groups were formed to address ease of doing business; finance; funding and fintech; technology facilitation and deployment; trade and exports.

It was recommended that a 12 months claim period be considered for all bank guarantees subsequent to the amendment of section 28 of the Indian Contract Act and section 17 of the Banking Laws (Amendment) Act, 2012. MSMEs’ budget expectations were shared with the government as part of the pre-budget memorandum 2020-21. Efforts were made to help build a policy environment that would bolster MSME competitiveness through Make in India. Inputs were also shared for enhancing bilateral trade with United Arab Emirates (UAE), Slovak Republic and Taiwan. Suggestions, specifically with respect to tariff and non-tariff issues with Brazil, were also shared during the year. Several recommendations were submitted to the government, and some of them that were accepted are:

• In response to the recommendation that all credit related matters of MSMEs be monitored by an apex office, the government has agreed that the credit related matters of banks including service charges/processing fees and rate of interest, amongst others will be deregulated by RBI. These will be governed by the respective bank’s own board approved lending policies

• The Banking Codes and Standards Board of India (BCSBI) formulated a code of bank’s commitment
to micro and small enterprises for adoption and implementation by its members, prescribing a reduced timeframe of 3 weeks for processing a loan application for credit between INR 5 to 25 lakh from the 4 weeks taken earlier. The timeframe for processing loan applications with a credit limit above INR 25 lakh has also been reduced to 6 weeks from the original 8 weeks.

- In response to the suggestion that the government should set up an agency to support MSMEs in obtaining standards and certification for technology upgradation, the government is setting up 20 hubs and 100 spokes in the form of tool rooms.

**ACTION**

**International Outreach**

The 16th Global SME Business Summit saw deliberations on the potential opportunities, threats and the way forward for integrating SMEs into the global value chains and contributing substantially to the USD 5 trillion economy in the making. Shri Nitin Gadkari, Minister of Road Transport & Highways and MSME shared his vision of catapulting MSME exports to 60% of total Indian exports and creation of 5 crore new jobs and highlighted the need for industry collaboration to develop policies to encourage MSMEs in manufacturing, investment in skills and entrepreneurship and provision of knowledge services at the cluster and micro level. Aspects related to MSME financing, technology adoption and branding and marketing and ease of doing business measures were also deliberated upon. Over 700 participants from more than 24 countries engaged with Indian MSMEs and participated in over 800 B2B meetings during the summit.

**International Linkages**

The 1st ever Russia-India Forum on interaction between small and medium enterprises was organized in partnership with Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce and Industry, Government of India along with Ministry of Industry and Trade, Russia and Russian Export Centre. The Russian delegation was led by Mr Denis Manturov, Minister of Industry & Trade of the Russian Federation and the Indian delegation was led by Shri C R Chaudhary, the then Minister of State for Commerce & Industry. Over 100 participants representing 90 companies from Russia and 150 participants from the Indian industry participated in this bilateral forum which also saw group discussions on key subjects such as digital technologies, waste management, healthcare, pharmaceuticals, biotechnologies and food industry.

The India-US SME Forum, organized for the first time in India, was a crucial step towards the formation of the India-US SME CEO Forum. Apart from senior government officials from India and US, approximately 35 small entrepreneurs from the US and 30 Indian SMEs participated in the event. The discussions revolved around the need for formation of a specific SME CEO forum between India and US and the necessity of more effective interaction between the two countries towards providing a boost to the MSME sector.

**Rural and Traditional Industry**

CII works in partnership with government and industry to revive and promote investment in the rural economy, especially sectors such as honey, bamboo, dairy, tourism and medical devices, amongst others. Support
was extended to the government’s plans of reviving and re-branding Khadi & Village Industries, a segment with export potential given that Khadi innovations are drawing huge national and international appeal.

An event themed Globalizing Brand Khadi - the Pride of India was organized in partnership with KVIC to highlight Khadi as a global product to be harnessed for growth of Indian artisans. More than 250 participants joined the event graced by Shri Nitin Gadkari and by the Minister of State for Animal Husbandry, Dairying & Fisheries and MSME, Shri Pratap Chandra Sarangi and other senior government officials.

**Export Promotion and Trade Facilitation**

With a view to unlocking the MSME potential, initiatives were launched to enhance the competitiveness of the entire MSME ecosystem. Suggestions were made for import & export and preferential treatment of MSMEs; to understand new standards for new products & product testing and an international lab set up to check quality. Several other areas were explored to give a thrust to the MSME sector.

The North East MSME Summit for SC/ST Entrepreneurs was organized, in partnership with the Ministry of MSME, with the aim to promote and enhance economic activities and generate awareness in the region. The endeavour was to recognize, promote and showcase the strengths and achievements of Indian MSMEs in the North-Eastern region and create awareness about key government initiatives, schemes and policies.

Attended by more than 700 MSMEs, the summit explored potential business opportunities and scope for exports from the region; enhanced financial linkages for SC/ST entrepreneurs and development of
tourism sector. It also hosted a workshop for apprising entrepreneurs of potential business opportunities in piggeries, bamboo and cane.

**Technology Facilitation Centre**

CII, with its technology and financial partners, put together a three year intervention to facilitate use of technology for the benefit of MSMEs and address critical barriers such as accessibility to newer technologies, affordability of hi-tech innovative solutions for efficiency, high cost of operations and maintenance, design building of new product development, skilling manpower, return on investments and global outreach for exports, amongst others.

Project ‘TechSaksham’ launched by Shri Nitin Gadkari under the aegis of the Technology Centre, is based on a Vision 2022 Paper on ‘Enhancing MSME Competitiveness’. The three year project envisages a series of policy discussions through the year planned along with inputs and recommendations on changes in current policies and schemes or creation of new ones.

It also suggests the launch of a traditional media and social media campaign involving MSMEs, as well as a portal that hosts resources from technology providers. The objective is to create technology awareness and indigenisation of technologies.

Entrepreneurship and handholding workshops for deploying technology amongst MSMEs will be conducted, followed by regular feedback and monitoring of adoption of various technologies by MSMEs. In the first phase it will target to digitally enable over 10,000 MSMEs and reach out to over 5 lakh MSMEs through e-learning modules and innovative knowledge platforms.

**Finance Facilitation Centre**

Despite their extensive relevance, MSMEs face challenges that impede their growth, with finance being the most critical one. The addressable credit gap in the MSME sector is estimated to be around INR 25.8 trillion or USD 397 billion, which is a huge potential for the financial institutions to finance in the near future. CII SME Finance Facilitation Centre provides advisory services and facilitates access to funds and other related requirements. The centre aggregates financing options from large financial institutions and matches SME financing and related demands with banks and financial institutions. It endeavours to build financial literacy amongst SMEs through roadshows, webinars and financing conferences.

**Building Competitiveness**

During the year, efforts were also made to raise competitiveness of Indian MSMEs, enhance productivity levels through adoption and dissemination of best practices, knowledge management systems and appropriate technologies. Training programmes were organized in partnership with Association for Overseas Technical Cooperation and Sustainable Partnerships (AOTS) and Ministry of Economy, Trade and Industry (METI), Japan to enhance competitiveness of Indian MSMEs. The programmes, aimed at developing leadership acumen at various levels, were conducted in classrooms as well as through digital formats. Apart from developing core human resources and enhancing competitiveness, these programmes promote technical cooperation and relations between India and Japan.
The public sector has contributed immensely to India’s success story, by facilitating the economy’s transition from being agro-based to industry-led. While India stands at the threshold of major transformation today, there is an urgent need to address the sector’s limitations, take a fresh look at the PSEs’ role and realign policies accordingly. The CII PSE Council endeavours to enable Central Public Sector Enterprises (CPSEs) to build scale while helping them become globally competitive and emerge as champions. The sector’s challenges, matters of common cause and contribution to the socio-economic growth are represented by the council, with a view to enable it to unlock its real potential.

ADVOCACY
The Prime Minister of India flagged 5 key challenges for PSEs to address by 2022. These include maximizing their geo-strategic reach; minimizing the country’s import bill; integrating innovation and research; optimally utilizing CSR funds and creating a new development model for the Indian PSEs. In this direction, apart from identifying specific actions to boost CPSEs’ competitiveness, a Competitiveness Model was also developed. The model is designed to enable these corporates to compete in global markets. The six elements at the core of the model are clarity on the roadmap and objectives of CPSEs; clear role demarcation; operational independence and instituting an independent and empowered board; ensuring a level playing field between CPSEs & private players and becoming future ready.

CII outlined 15 key recommendations for enabling PSEs to expand exports and enhance their geo-strategic reach by 2022. The reports titled The Rise of the Elephant: Enhancing Competitiveness of CPSEs and Can the Indian PSEs Enhance Their Geo-Strategic Reach outline the roadmaps for PSEs to enhance their competitiveness; maximize reach and grow their business in markets beyond India.

ACTION
During the year, efforts were directed at showcasing PSEs’ contribution to nation building, voicing their aspirations and re-energizing them to perform their rightful role in taking the country to its ambitious economic goal. Organized in association with the Department of Public Enterprises and National Foundation for Corporate Governance, the PSE Summit, deliberated upon various aspects of achieving greater competitiveness. In order to prepare the PSEs for a disruptive market environment and to make them more responsive and competitive, the need for a new operating model was raised at the summit.
The digital revolution and global headwinds are forcing massive transformations across production, supply chains and market frameworks. These forces are necessitating that organizations in the ‘New India’ be agile in adapting to evolving business models. Against this background, the HR leadership is grappling with the challenges of fast implementing revolutionary people and process transformations. In this context, the CII National Committee on Leadership and HR’s predominant agenda was to drive organizational success in the emerging world of work.

**ADVOCACY**

The world is witnessing a rapidly emerging talent landscape characterized by the rise of gig workers and a multi-generational workforce. In this backdrop, CII maintained its thrust on facilitating greater engagement amongst stakeholders. The focus was on enabling the HR leadership to imbibe and leverage emerging technologies such as artificial intelligence process automation, blockchain and analytics that will form the backbone of HR strategies and define the ability to succeed. Recognizing the critical role of the human factor amidst these transformative developments, the imperative was to drive people strategy and the transition from a transactional to a strategic HR function.

CII’s National HR Excellence Framework also furthered the mandate of facilitating reinforcement of ‘people processes’ across organizations. The CII-HR Excellence Model is based on encompassing all aspects of human resource management and through this model, organizations can improve HR performance practices and capabilities by providing objective feedback for improvement, while facilitating communication and sharing best practices and information within and amongst organizations.
**ACTION**

**The New World of Work**

**The 9th HR Conclave**

The 9th edition of the National HR Conclave themed Talent, Technology, Transformation – Building the Future Together deliberated on the transformations that organizations are experiencing with the advent of technologies such as artificial intelligence, robotic process automation, IoT, blockchain and predictive analytics amongst others. The changing role of HR amidst these disruptions was the focus of discussions. The deliberations further explored challenges of an evolving talent landscape, comprising fluid gig workers, a co-existing multi-generational and metal collared (smart machines and bots) workforce and managing their performance and aspirations.

**Preparing for the New World of Work**

GENESIS, a whitepaper competition, was organized to engage young leaders meaningfully and encourage young voices to shape the agenda of People and Workplace of Tomorrow. Participants received valuable feedback on their ideas that they pitched to prominent industry leaders. The whitepapers focused on key emerging elements in the modern workspace including Industry 4.0 readiness, the importance of mental wellness, optimizing the gig talent pool and the emerging millennial workforce.

Of the 96 entries, that underwent rigorous assessment by an eminent jury comprising top HR leaders from across the country, the finalists made presentations at the 9th CII National HR Conclave.

**Masterclasses**

**The Power of HR Analytics**

The endeavour to provide interactive, web-based learning and problem solving sessions continued with the web based masterclass on Leveraging the Power of HR Analytics. Discussions on a diverse range of topics related to application of analytics in HR and a demonstration of the functioning of HR analytics tools kept the participants from over 30 organizations engaged.

**Humanizing Employee Engagement**

The series of web based masterclasses on Humanizing Employee Engagement with AI and Analytics in HR established the need for updating traditional engagement models; shifting focus on experience; leveraging HR Tech to take data-driven, quick decisions and empowering HR to become a key consultative business partner. Latest trends such as application of AI powered chatbots to transform employee experience and live demonstration of tools to drive people strategy were also discussed.

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Team Talent Litmus, winners of GENESIS 2019 receiving the award in Mumbai. From L to R: Sanjay Behl; Satpreet Arora, Co-Founder, Talent Litmus; Kiran Wadhwa, Co-Founder, Talent Litmus; Manu Wadhwa, CHRO, Sony Pictures Networks India; Indrani Kar, Principal Advisor, CII; Rajesh Padmanabhan, Chairman, CII National HR Conclave & Director, Group CHRO, Welspun Group and Prince Augustin, Co-Chairman, CII National HR Conclave and EVP- Group Human Capital and Leadership Development, Mahindra Group

Sanjay Behl, addressing the audience at the 9th CII National HR Conclave in Mumbai
The CII HR Excellence Model - Paving the Way for Excellence in HR

The National HR Excellence Framework, developed with the mandate of facilitating reinforcement of ‘people processes’ in organizations, follows a three pronged approach of assessments, awards and capacity building.

Assessor Training Workshops

Efforts to accelerate the development of an ecosystem for adoption of the CII HR Excellence Model continued during the year. Senior leaders from the industry were taken through intensive three days assessor training workshops on the CII National HR Excellence Award Model to familiarize them with the award criterion, and assessment process. Over 100 assessors underwent three assessor training workshops.

10th CII National HR Excellence Award

Achieving Excellence in HR Processes

Organizations that had achieved exemplary HR performance and practices were recognized yet again at the 10th CII National HR Excellence Awards. Applicants were assessed on the HR Excellence Model that encourages them to strive towards achieving distinction within the framework of their own process improvement goals. Under the revised edition of the model, organizations were assessed on parameters related to analytics and technology in HR processes, employee experience and leadership branding amongst others. OPEL (Outcomes, Processes, Evaluation & Learning), a new evaluation tool was also introduced.

The Prize for Leadership in HR Excellence was conferred upon Mangal Industries, CESC Limited, Kirloskar Pneumatic Company Limited and Tata Consultancy Services Limited. The other two award categories included Significant Achievement in HR Excellence and Strong Commitment to HR Excellence.

10th CII National HR Excellence Award Confluence

Learn From the Achievers

During the Annual HR Excellence Award Confluence the Achievers and Assessors, an integral part of the HR Excellence Award Process, shared their perspectives on the best practices and assessment process. The objective was to propel organizations towards creating and sustaining a culture of HR excellence. The importance of the assessment process in bridging the gaps and making assessors ambassadors of the framework within their organizations was also emphasised.

Team from Kirloskar Pneumatic Company Limited receiving the award for Leadership in HR Excellence from Sanjay Behl at the 10th CII National HR Excellence Award Confluence in Mumbai

Vivek Gambhir, MD & CEO, Godrej Consumer Products Limited delivering the keynote address at the 10th CII National HR Excellence Award Confluence in Mumbai
INDUSTRIAL RELATIONS

Labour market regulations are critical for India to compete effectively in a global environment. Cordial industrial relations are pertinent to cultivating and strengthening the country’s business competitiveness, investments, jobs and economic growth. The ecosystem of industrial relations encompasses minimum wages, worker safety and health, productivity, employment generation, labour welfare, women’s participation in the workforce, sustainable enterprises, employment and social security.

With a strong emphasis on collaboration and on ground action, CII National Committee on Industrial Relations works closely with the Ministry of Labour & Employment (MoLE), Government of India on key labour issues. Industry – Trade Union Dialogue Forum, a bipartite body, upholds the spirit of dialogue and mutual trust by facilitating discussions between trade unions and industry on emerging issues. CII also engaged with the government on initiatives in partnership with the MoLE, EPFO, ESIC, PFRDA, National Safety Council and the Central Board of Workers Education, amongst others.

ADVOCACY

During the year, the proposed Labour Codes were deliberated at various industry forums as well as with the MoLE. Inputs were provided to the Ministry to support the efforts to simplify, amalgamate and rationalize the provisions of 44 central labour laws into four codes. The Code on Wages, 2019, which subsumes 4 existing laws ensures minimum wage and timely payment to approximately 50 crore workers in the organized as well as unorganized sectors. The Code was passed by both houses of Parliament and received the President’s consent. The proposed method to determine minimum wages, outlined by CII to enable the appropriate government authorities to determine factors by which the minimum wages can be fixed for the employees, was accepted by the government. The recommendation regarding introduction of provision of Compounding of Offences was also accepted.

The Code on Occupational Health Safety & Working Conditions 2019 that subsumes 13 Labour Acts, enhances the provisions of safety, health, welfare and
working conditions existing in about 9 major sectors to all establishments having 10 or more workers. CII recommended a revision of the definition of “occupier” to consider the authorized person involved in day to day management of the company as the occupier, instead of the person having ultimate control over the affairs of the factory.

The need to assign all contraventions / non-conformities that are non-compoundable to labour courts instead of criminal courts was emphasized to the government.

The labour code on industrial relations, that consolidates 4 existing laws, proposes amendment of laws relating to registration of trade unions, conditions of employment, fixed term employment, investigation and settlement of industrial disputes and related matters. CII’s recommendations regarding Fixed Term Employment and empowering states to modify the threshold number of workers before lay-off, retrenchment and closure, were accepted.

The Code on Social Security 2019 subsumes 9 Labour Social Security Acts and ensures social security coverage to workers in the unorganized sector including self-employed, gig and platform workers. It was recommended that to support MSMEs, the government should consider offering creche facilities and reimburse 12 weeks’ maternity benefits. To enable provision of basic amenities to women working in shifts, the need for providing accommodation was highlighted.

**ACTION**

The Conference on Labour Law Reforms: Enabling Ease of Doing Business, organized in partnership with the Ministry of Labour & Employment deliberated upon labour reform issues with a view to improving the country’s business environment and finding a way forward.

Interactions with the Central Provident Fund Commissioner were organized in 5 cities in partnership with Employees’ Provident Fund Organization, to disseminate information on the recent amendments, judgments & Ease of Doing Business reforms by EPFO. At a special workshop, some of the top exempted establishments showcased their experiences and implementation of best practices related to operation, grievance redressal and investment processes followed by the Exempted Trusts.

**RESEARCH**

The Industry Trade Union Dialogue Forum deliberated upon the need for a comprehensive social safety net, which is both a right and an economic need that also impacts productivity. A series of brain storming sessions discussed the priority and affordability to understand financial implications of providing social security to every Indian citizen. The group, comprising of thought leaders and experts, defined the big picture on the forces shaping social security and drew up concrete recommendations for the Government of India to consider.
KNOWLEDGE ECONOMY INITIATIVES
Technology, R&D and Innovation

Intellectual Property Rights

Emerging Technologies

Education & Industry - Academia Collaboration

Design

Corporate - Start-up Business Connect
TECHNOLOGY INITIATIVES

With science and technology forming the fulcrum of socio-economic development, India is increasingly giving a thrust to research and innovation to drive inclusive economic growth. Robust policy measures, taken by the government, have created an enabling environment for accelerating development of a research and entrepreneurial culture as well as building competitive enterprises. CII has launched a slew of initiatives to strengthen this momentum, build an ecosystem to spur R&D investments and propel innovation.

ADVOCACY

With a view to giving a fillip to R&D and innovation in India, the CII National Committee on Technology and R&D made a series of recommendations to the Government. The proposal for ‘Advanced Mission-Mode Innovation and Research (ADMIRE)’ programme, submitted to the Office of the Principal Scientific Adviser to the Government of India, included mandating the allocation of a significant quantum of various Ministries’ budget towards R&D for technology development in PPP mode. CII has also developed a matrix of more than 60 parameters for evaluating over 600 National R&D labs. The pilot was launched based on the framework prepared by CII in consultation with the Office of the Principal Scientific Adviser. A Task Force on Additive Manufacturing, with representation from industry, government and academia, was constituted to undertake a Technology Foresight Study.

A Future Business Group was formed to spur the creation of an ecosystem to support the emergence of new-age businesses, shape future businesses, create companies of global scale and nurture skills necessary to manage such businesses. The group recommended that the government adopt innovative and faster policy making mechanisms to ensure that disruptive businesses flourish. It has also emphasized that a balanced policy paradigm will be essential to address the growing conflict between new age international and Indian players in e-Commerce, data protection and digital payments, amongst others.
ACTION

For the first time, the worldwide launch of the Global Innovation Index (GII) was held in India. Organized along with Department for Promotion of Industry and Internal Trade (DPIIT) and World Intellectual Property Organization (WIPO), the 2019 edition of the Report was released by Shri Piyush Goyal, Minister of Commerce & Industry and Railways and Dr Francis Gurry, Director General, WIPO. India ranked 52 amongst 129 economies, evaluated on more than 80 indicators of innovation capabilities. As its founding partner, CII contributed the India Chapter of GII, titled ‘Innovations in Healthcare Affordability and Delivery—An Indian Perspective’, authored by Dr Devi Prasad Shetty. Both Indian and international speakers, emphasizing GII’s significance as a driver of economic growth, shared their innovation success stories and the need for innovation solutions. A Report on ‘India’s R&D Expenditure Ecosystem’, prepared by the Economic Advisory Council to the Prime Minister (EAC-PM) in consultation with the Office of the Principal Scientific Adviser to the Government of India, was also released.

In its 25th year now, CII’s Technology Summit continued to provide opportunities to forge and foster global technology partnerships. With Netherlands as the partner country, in 2019 the summit focused on the nexus of Water, Agriculture and Health (WAH). His Majesty King Willem-Alexander and Her Majesty Queen Maxima of the Kingdom of the Netherlands led the largest ever Dutch delegation to India, comprising over 200 members representing industry, institutions, government and entrepreneurs. The summit witnessed meaningful deliberations amongst more than 30 government dignitaries, over 100 CXOs, 250 speakers, and 1400 delegates. Indian and Dutch companies and institutions signed over 40 MoUs during the two-day summit, that also hosted over 500 business to business meetings. The Digital Exposition was the platform for more than 60 organizations to share their experiences of 25 Indo-Dutch collaborative projects in agriculture, healthcare, water and various hi-tech areas. At the NL-India Start-up NEXUS, 30 Indo-Dutch start-ups pitched their business ideas. Commemorating ten years of Indo-Dutch S&T partnership, Dr Harsh Vardhan, Minister of Health & Family Welfare, Science & Technology and Earth Sciences, India and Ms Mona Keijzer, State Secretary for Economic Affairs and Climate Policy, The Netherlands released a booklet on Indo-Dutch Science & Technology and Innovation Cooperation.

India faces a pressing need to foster a R&D ecosystem and improve its international ranking in the GII 2020. Thus the first ever ‘Indian R&D Ecosystem Conclave’, held in collaboration with PSA’s office and DPIIT, deliberated on addressing the data gaps, global strategies and R&D best practices towards this end. Going forward, CII will work on R&D data management under a programme management unit to be set up by PSA’s office and it will also host the R&D Conclave annually. As a part of Technology & Innovation initiative, CII every year recognizes the top 25 companies across large, medium and small segments for their innovation excellence. Last year, 25 companies were recognized during the 6th edition of CII Industrial Innovation Awards Ceremony at the Indian R&D Ecosystem Conclave held in New Delhi. The winners were selected after a rigorous assessment based on the innovation framework for firms.
developed by CII. A jury comprising of eminent experts in the country selected the category award winners. A compendium comprising case studies of the top 25 innovative companies was also released at the awards ceremony held during the conclave.

A series of workshops, held during the year, facilitated the convergence of research and technology amongst industry, academia, government and research institutions. While an actionable roadmap for Additive Manufacturing was deliberated upon during two workshops, two interactive sessions on chemicals and healthcare were also organized under a CSIR MoU on technology development and deployment. During a stakeholder interaction, Prof K VijayRaghavan, Principal Scientific Advisor to the Government of India shared his views on the role of MNCs in India’s innovation ecosystem. The R&D heads of several MNCs engaged in a discussion on how MNCs’ contribution to India’s R&D endeavors can be enhanced.

Agriculture Sector
The centre made efforts to create awareness and disseminate information about business opportunities in the food and agro sector. The 13th edition of the conference on Emerging Technologies in Food Processing Sector, Dairy Technologies and Traditional Foods provided entrepreneurs an opportunity to build linkages with technology providers as well as learn about current trends and related innovations.

Automotive Sector
To pursue the objective of understanding the challenges facing the automotive value chains, discussing key research & technology trends and deliberating upon solutions and interventions, TNTDPC brought stakeholders together at the conference on Automotive R&D Trends. With a mature automotive sector and proven offshoring capabilities, India is well poised to explore the emerging opportunities in auto design & engineering services. These opportunities and the technological developments and trends were outlined at the conference on Automotive Design & Engineering.

IoT Sector
Manufacturing enterprises got insights into dealing with global competitiveness pressures by developing connected assets, connected supply chains, connected workforce and connected operations during the conference on Intelligent Industries.

MSME Sector
The government has set itself a two pronged target of spurring MSME growth and indigenizing critical aerospace and defence manufacturing technologies. TNTDPC delivered on this objective through

TAMIL NADU TECHNOLOGY DEVELOPMENT AND PROMOTION CENTRE
Tamil Nadu Technology Development and Promotion Centre (TNTDPC), CII’s joint initiative with the Government of Tamil Nadu, disseminates latest technological trends whilst developing a robust business network and facilitating knowledge transfer amongst industry stakeholders. TNTDPC endeavors to build technology awareness and identification, technology commercialization, offers IPR services and promotes technologies for societal benefits through its concept-to-commissioning support.

From L to R: R Kamaraj, Minister of Food and Civil Supplies, Government of Tamil Nadu; Rameswar Teli, Minister of State for Food Processing Industries; Banwarilal Purohit, Governor of Tamil Nadu; Sanjay Jayasvathinavelu, Chairman, CII SR & CMD, LMW Ltd; Navas Meeran, Chairman, Foodpro 2019 and Chairman, Eastern Condiments Pvt Ltd and Ravi Chandran Parusothaman, President, Danfoss India at the 13th edition of the Conference on Emerging Technologies in Food Processing Sector, Dairy Technologies and Traditional Foods in Chennai

From L to R: Dr Aravind S Bharadwaj, CTO - FES, Mahindra & Mahindra Ltd; Dr Swarna Ramesh, Scientist G, Additional Director (Robotics), CVRDE, Ministry of Defence; Dr J Radhakrishnan, Principal Secretary to Government, Transport Department, Government of Tamil Nadu and Dr Arun Jaura, Conference Chairman & MD, Michelin India Technology Center LLP at the 11th edition of the Conference on Automotive R&D Trends in Chennai
various initiatives such as the Aerospace & Defence Manufacturing Technologies conference that brought together MSMEs and technology players.

**Industry Sector**

Several manufacturing companies have achieved improved quality and enhanced flexibility in manufacturing processes by adopting new technologies and solutions. The Industrial Transformation conference was an occasion for such companies to share their achievements and for stakeholders to discuss actionable perspectives for connected factories, transformation strategies for adopting digital services and building an ecosystem of interconnected, end-to-end processes enabled by powerful partnerships.

**Technology Forum**

In an era where technology is fast disrupting businesses, TNTDPC’s CTO Forum is a platform for Chief Technology Officers to learn about existing and emerging technologies. Through the Forum’s conferences and roundtable series, businesses and technology leaders supplemented their domain knowledge to effectively handle disruptive technologies. Efforts were also directed at helping companies prepare for adopting new age technologies and enhancing their innovation capabilities.

**CII-GUJARAT KNOWLEDGE APPLICATION AND FACILITATION CENTRE**

CII-Gujarat Knowledge Application and Facilitation Centre (CII-GKAFC), CII’s technology and innovation wing, works towards enhancing industry’s R&D capabilities and creating a conducive environment to facilitate start-ups/entrepreneurship. These efforts are aligned to the government’s Make in India and Start-up India initiatives.

**ADVOCACY**

CII-GKAFC supports industry, particularly MSMEs, in setting up in-house R&D centres, renders advisory services, enables market access for DPIIT approved start-ups, undertakes vendor development, and works with innovation driven organizations for pilot and demonstrative projects as well as product commercialization.

The centre also collaborates with the government to build a conducive policy environment, undertakes surveys and develops industry reports towards this goal.

**ACTION**

The centre’s R&D advisory services have enabled companies such as Anupam Rasayan India Ltd, Banas Dairy and Oizom Instruments to obtain DSIR recognition and build their in-house R&D capability. Phycolinc Technologies Pvt Ltd, a DPIIT recognized clean-tech start-up, benefitted from CII-GKAF’s techno business advisory services including market strategizing and development, technology commercialization, corporate connect, pilot demonstration, industry collaboration and handholding support.
GLOBAL INNOVATION & TECHNOLOGY ALLIANCE

Global Innovation & Technology Alliance (GITA), is a public private partnership promoted with the Technology Development Board, Department of Science & Technology (DST), Government of India. Set up in 2011, GITA supports acceleration of India’s industrial R&D efforts.

An innovative platform that maps technology gaps and evaluates technologies available across the globe, it also forges techno-strategic collaborative partnerships appropriate for the Indian economy. The alliance connects industrial and institutional partners for effective matchmaking and collaborative industrial R&D projects, facilitating funding for technology development/acquisition/customization/deployment. Over the years, GITA has created a niche for itself as a catalyst for fostering innovation as well as generating awareness and interest to enable industry to benefit from various government schemes/funds being managed by it.

ACTION

India-Canada Collaborative Industrial Research & Development Programme

Bringing together companies, research organizations, academics and other collaborators, the India Canada programme stimulates innovative R&D projects that address a particular market need or challenge; demonstrate high industrial relevance and commercial potential and aim to benefit all participants, and more broadly, both countries. The DST and NRC Indistrial Research Assistance Programme together fund the USD 500,000 programme. In 2019, projects were encouraged under advanced manufacturing & materials, clean technologies, food & agro technologies, artificial intelligence & Internet of Things (IoT) and health informatics. During the year, 3 projects from these areas were approved under the programme. Moving forward towards the upcoming 2020 India-Canada call, projects under smart infrastructure, CleanTech, food & AgTech and healthcare categories will be welcomed by both nations. These areas were approved under the programme.

India-Israel Industrial R&D and Technological Innovation Fund (I4F)

A cooperation platform between DST and Israel Government’s Israel Innovation Authority (IIA), the I4F promotes, facilitates and supports joint industrial R&D projects, that have the potential to successfully commercialize and deliver benefit to both countries. The USD 40 million fund (over a 5 year period) is focused on projects in sectors like agriculture, energy, healthcare, information and communication technologies and water and any other projects of mutual interest to both.

India-Italy Collaborative Industrial Research & Development Programme

The DST and Directorate General for Cultural and Economic Promotion and Innovation of the Ministry of Foreign Affairs and International Cooperation of Italy, have created funding mechanisms for R&D projects in aerospace, advanced manufacturing and materials, technologies for cultural heritage, internet of things (IoT) and clean technologies. The programme also promotes activities intended to generate new or expanded research and technology-based partnerships between the two countries.
India-Republic of Korea Joint Applied R&D Programme

Set up as a collaborative effort between the DST and MoC&I and Republic of Korea’s Ministry of Science & ICT and Ministry of Trade, Industry & Energy, this programme has a fund of USD 40 million. With a view to respond to global issues concerning science and technology and developing technologies that can be commercialized within 2 years, the programme promotes joint industrial research in future manufacturing, digital transformation, future utilities, biotechnology and healthcare sectors. The 2nd call for proposals under this programme was launched by Dr Harsh Vardhan in November 2019.

India-Spain Programme of Co-operation on Industrial Research & Development

The programme promotes innovation-driven research and technology development between the science and technology stakeholders from both countries. It also encourages partnerships and business-led innovative R&D projects. Funded jointly by DST and Secretariat of State for Research, Development and Innovation, Ministry of Economy and Competitiveness, Government of Spain, the USD 500,000 annual fund, selected three projects from advanced manufacturing & materials, clean technologies, agro & food technologies and IoT. Moving forward in 2020, projects under Digital Health in lieu of Advanced Manufacturing and Materials are invited to participate in this prestigious programme.

India-Sweden Collaborative Industrial Research and Development Programme

The DST and the Swedish Governmental Agency for Innovation Systems (VINNOVA), Sweden partnered to create funding mechanisms that support joint R&D projects and activities to generate new or expanded research and technology-based partnerships. A funding of up to INR 1.5 crore per project is available for digitalization, IoT, smart cities and clean technologies.

MoU Signing between GITA and the Commonwealth Secretariat

An MoU was signed with the Commonwealth Secretariat to strengthen South-South Cooperation and public private partnership by connecting, mentoring and financing African innovators. This MoU will catalyze industrial innovation between India and the Commonwealth member countries.

GITA INNOVATION EXCHANGE (GIXC)

The GITA Innovation Exchange is an innovation exchange platform that also services requests for matchmaking for key stakeholders including, industry (start-ups, SMEs, large companies), investors, academic/research institutions, aspiring innovators and IP specialists. Till date 442 registrations from 308 companies have made requests for connects in technologies, technological partnerships, finance for innovation and R&D and IP services.

8th GITA FOUNDATION DAY

At the 8th GITA Foundation Day, Dr Harsh Vardhan addressed delegates across industry, government, academia and start-ups. The face-to-face B2B meet-up which was conducted parallelly was immensely appreciated by all delegates. International presence at the meet included delegations and representatives from Canada, Israel, Republic of Korea, Spain, Brazil, Finland, Italy, Sweden, Taiwan and the UK.
Technical training of farmers under CII’s Cleaner Air Better Life initiative. This and other measures led to a significant decline in stubble burning incidents in the selected villages of Haryana and Punjab.
CII impacts over one million youth annually through its skill development and livelihood initiatives. CII’s Model Career Centers have imparted career counselling to over 4.21 lakh youth and provided employment to 1.35 lakh job seekers.
Given the immense value creation potential that Intellectual Property (IP) holds, Indian industry has over the last few years concentrated on IP creation. IPR’s vital role in making businesses more competitive and public services more effective are demonstrated by CII with a view to strengthening the country’s IP ecosystem, build appreciation for IPR and expand its protection in the Indian industry. To guide, steer and direct newer efforts in fostering an IPR culture in the country, CII’s National Committee on IPR focused on the theme, ‘Business Growth Through IP Intensive Industries’.

**ADVOCACY**

CII follows the contours of existing Indian laws, government policies and rules in the policy making exercises, while equally considering the industry’s interest when preparing policy positions, action and advocacy plans. Following industry expectations were communicated to government with a view to nurturing the country’s IPR ecosystem:

- For addressing IPR issues faced by SMEs and start-ups, DPIIT may request the government to consider introducing a court system similar to UK’s IPEC
- To help Indian start-ups in protecting their designs in other countries DPIIT could consider joining the Hague Agreement concerning international deposit of industrial design
- DPIIT was urged to bring clarity and uniformity to the treatment of computer related inventions (CRI)
- Issues with interpretation of biodiversity laws that impact R&D and patenting of inventions were shared with the relevant authorities
- Request for changes to the draft Copyright Amendment Rules, 2019 were submitted to DPIIT.

A statement on India’s IPR ecosystem was also shared with the United States Trade Representative (USTR), to provide a holistic picture of the government and industry initiatives in strengthening and enforcing IP laws in the country.

**ACTION**

In 2019-20, CII stepped up its efforts at strengthening the country’s IP ecosystem through programmes to address gaps in innovation, IPR filings and protection. These were designed in partnership with organizations
such as United States Patent and Trademark Office (USPTO), Japan Patent Office (JPO), the United Kingdom Intellectual Property Office (UKIPO) and World Intellectual Property Organization (WIPO). Pursuing the objective of building advanced level capacity, three interactive sessions were conducted for customs officials at Chennai, Mumbai and Shillong.

The 11th edition of the National Intellectual Property awards were presented on the World Intellectual Property Day, in collaboration with DPIIT and IPO, India, at the Intellectual Property convention. The event brought together eminent speakers from the government, the judiciary, IP experts, legal counsels, industry and academics from India and abroad. Few past winners of the IP awards also showcased their journey at an exhibition.

The first Intellectual Property Mission to Japan familiarized the Indian industry with Japan’s IP system and encouraged industry level consultations between IP driven companies of the two countries.

Innovation and IP-led technology will be critical for India to achieve the USD 5 trillion economy target. These imperatives were discussed at the 5th edition of the International IPR conference organized jointly with IPO and DPIIT. Government officials, global IP lawyers and attorneys, legal counsels, industry and academics shared their experiences at the conference, that also witnessed

CII recognized excellence in patents, trademarks and design based on a five-year, jury evaluated process that culminated in the Industrial Intellectual Property Awards. In 2019, a total of 11 large, medium and small companies and start-ups were celebrated for their portfolios in the two broad categories of engineering and life sciences.

INTELLECTUAL PROPERTY FACILITATION CENTRES

Set up with support from the Ministry of Micro, Small & Medium Enterprises, the Intellectual Property Facilitation Centres (IPFCs) in Ahmedabad, Indore and Mysore work to boost India’s IP culture.

The focus is on enabling MSMEs/technopreneurs/start-ups/individual innovators to access and compete in global markets by enhancing and leveraging their intellectual capital. This objective is driven through handholding support, IPR services and creating awareness on IP protection strategies.
of more than 233 patent applications in India and 22 international patents.

In addition to registration of more than 926 trademarks and 1567 industrial designs, including the in-house CII brand registration, the IPFCs have also assisted in the filing of 94 copyright applications and 4 GIs and they together maintain IP portfolios of 12 corporates.

To support and enhance awareness among the MSMEs, technopreneurs, start-ups and individual IPR innovators, the IPFCs organized a series of workshops, training & awareness programmes and seminars.

The workshop on Intellectual Property Rights for MSME Officers, a certificate training programme on Patent and Trademark Prosecution in India, USA, EU and PCT; an IPR awareness programme for industry clusters and a national roving seminar on Patent Cooperation Treaty (PCT) helped bring clarity on the IPR regime in the country.
The IPR Cell was set up in Telangana to address the urgent need for regional level technology and IPR facilitation and to guide stakeholders on IP policy and IP services. Towards this end, the IPR cell identified IP litigation, patent prosecution as the areas of focus for 2019-20. The centre also expanded its presence in the region with IP services including search, analysis, drafting, filing and prosecution of patents, trademarks, industrial design, copyright, geographical indications and other related services.

ACTION

IPR Services

Taking forward the objective of handholding companies, the IPR Cell facilitated 325 IPR service requirements from search to analysis, drafting, filing and prosecution both within the country and overseas. The beneficiaries of these services included industry, entrepreneurs, government, MSMEs, academia, R&D institutions, grassroots level innovators and individuals. The centre has, over the years, also helped in filing more than 325 IPR applications in India; filing and registration of 16 patents; 98 trademarks, 39 industrial designs, 46 copyrights applications and 126 office action responses.

Linking design with next generation customer experiences will be a key aspect of industrial design in the years to come. Towards this end, leading design practitioners explored their role as problem-solvers and change-makers during the workshop on Industrial Design, organized in partnership with the Government of Telangana.

The inaugural edition of the Hyderabad Design Week (HDW) was also held to coincide with the 31st edition of the World Design Assembly in Hyderabad.

IP awareness was built amongst the scientists and engineers of Bharat Dynamic Limited, Kanchanbagh unit during an in-company IP mentor training. The participants learnt how to develop practices for protecting innovations and handling IPR issues. IP attorneys and IP analytics experts shared their experiences with the participants.

With the evolving IP litigation landscape, a summit to deliberate on the theme ‘Strategizing Litigation for Business Excellence’ drew much interest of the industry and key stakeholders.
EMERGING TECHNOLOGIES

INDUSTRY 4.0

The Indian manufacturing sector’s participation across the global value chains needs to scale up from the current 2-3% of merchandise exports to that comparable to manufacturing superpowers such as USA, China, Germany and Korea. Smart manufacturing will be a critical ingredient in achieving these aspirations, as global value chains become increasingly driven by smart manufacturing.

CII Smart Manufacturing Council was constituted with the objective of fostering the adoption of smart manufacturing/ Industry 4.0 by Indian companies.

About 50 Indian companies have come together towards the creation of an enabling ecosystem that promotes adoption of smart manufacturing at the various macro (ecosystem), meso (institutions) and micro (firm) levels.

ADVOCACY

Several initiatives were driven through the year to build the smart manufacturing ecosystem, one such being the launch of the Smart Manufacturing Platform during the 5th edition of the Smart Manufacturing Summit. A private sector initiative on Industry 4.0, the platform serves as a one stop shop to spearhead multi-disciplinary initiatives and services to enable adoption by the Indian industry.

During her visit, Dr Angela Merkel, Chancellor of Germany signed an agreement with Shri Narendra Modi, Prime Minister of India to create linkages between the German Platform Industrie 4.0 and the CII Smart Manufacturing Platform for cooperation and exchange of information including standardization, IT-security in networked systems, testbeds and use cases, business models and B2B platforms, and on topics shaping future digital ecosystems for Industry 4.0.

The CII platform will offer the following value-added services:

• Industry 4.0 maturity model: Assessment of user companies to map the level of maturity and deployment of Industry 4.0 on a scale of 1 to 5; followed by advisory services and technological interventions to move up the value chain.
• Training and capacity building: Based on the need, focused training / re-skilling of the existing workforce on varied aspects of Industry 4.0
• Digital exposition of use cases: Detailed sector-specific case-studies of deployment of Industry 4.0 for experiencing the impact it can make on a company
• Demonstration centers: Visit to CII’s network of Industry 4.0 demonstration centers across the country and overseas to get first-hand understanding and experience
• Conference, exhibition and workshops: A series of awareness workshops, webinars, international learning missions and events on Industry 4.0.

ACTION

The Department of Heavy Industry (DHI) is driving the creation of a conducive industrial ecosystem for adoption of Industry 4.0. In this endeavour, the CII-DHI series of 9 awareness workshops were held with the objective of providing the participants exposure to explore the digitalization possibilities, its benefits, challenges and the basic framework of readiness for Industry 4.0.

In addition, an international learning mission to Germany, organized parallel to Hanover Messe, helped industry understand the contours of transformation witnessed by the manufacturing sector and to showcase smart manufacturing in action. The 5th edition of the Smart Manufacturing summit focused on the theme Transitioning Local to Global.

SPACE

India’s space programme is making giant strides on the world stage. Over the last few years, the country has seen a major upsurge in participation of Indian industry and start-ups in satellite manufacturing/operation and launch vehicles. However, there is a need to expedite and deepen the engagement to address the demand for service required by this sector.

The CII National Committee on Space works towards aligning the players in the space technology sector, with requirements of the country’s space programme.

ADVOCACY

CII took forward the agenda of building an ecosystem to nurture globally competitive companies to deliver the needs of both Indian and global space sector. An interactive session with Dr V K Saraswat, Member, NITI Aayog was facilitated to gain an understanding of the proposed Space Activities Bill and make policy recommendations.

The Space Activities Bill is aimed at promoting commercial activities in space and encouraging private sector participation in the Indian space programme, taking national safety, security and international regulation in consideration.

ACTION

The objectives of exploring industry-to-industry collaboration; partnering opportunities for components
and sub-systems manufacturing and for knowledge sharing were driven through the space mission to the USA.

Members of the delegation gained knowledge through interactions with relevant stakeholders in Boeing, Lockheed Martin, USIBC, and Caltech. Visits to the facilities at NASA Goddard, SpaceX, Jet Propulsion Laboratory - NASA, Caltech and Keystone were also organized.

While the meetings and visits provided the delegation an opportunity to understand the sector and become aware of the US companies operating in areas like space, satellite, launch vehicles and aerospace, the visit also encouraged international cooperation by building stronger bilateral and multilateral relations.

Given that ISRO had issued an Expression of Interest for private sector engagement in manufacturing of satellites, this visit was well timed.

A recent approval of union cabinet on the proposal for agreement on science and technology cooperation between India and USA is also expected to encourage collaboration between India and America in this segment.

**INDIAN DIGITAL GAMING**

The global gaming market is estimated at USD 110 billion. However, despite being one of the largest users of digital products and services, India is low in the order (<0.5%) of digital gaming market share, including license and IPR. CII is playing the role of a catalyst and a facilitator in the development of the sector through capability building as well as working with the government to create an encouraging environment.

**ADVOCACY**

In working towards developing a thriving digital gaming sector in India, CII engaged in a discussion with Shri Amitabh Kant, CEO, NITI Aayog. It was proposed that digital gaming be positioned as an active sector and a conducive policy framework be developed.

**ACTION**

Indian Digital Gaming Society (IDGS), a not-for-profit organization was created by CII to facilitate growth and build capabilities of the Indian gaming industry. IDGS will be developed as a platform for start-ups and the youth to unleash their creativity and contribute towards India's digital economy. The objective is to catalyze the industry to effectively contribute to India’s economic growth and become a trust worthy global partner.

Rajan Navani, Chairman, CII India@75 Council and CII Future Businesses Group and Co-Chairman, CII AI Forum and Vice Chairman & MD, JetSynthesys and members of CII Indian Digital Gaming Society with Amitabh Kant, CEO, NITI Aayog in New Delhi.
INFORMATION & COMMUNICATION TECHNOLOGY

Today, India stands at the cusp of transforming into a digital economy, with both the public and private sector companies considering digital adoption as a growth enabler and a driving force in a highly competitive global landscape. Buoyed by demographics, globalization and reforms, India’s ICT infrastructure is already on its way to growing at a brisk pace over the next decade.

CII initiatives and policy work in this sector are aligned with its focus of working with the Government in making India a USD 1 trillion digital economy by 2022.

ADVOCACY

CII’s efforts in the ICT sector are led by the National Committees on Telecom & Broadband, IT & ITeS, e-Commerce and the Taskforce on PPP for Security of the Cyber Space. With a view to creating an enabling environment, several recommendations were made to the relevant ministries and government departments.

Telecom & Broadband

Development of a conducive policy framework and incentives for strengthening India’s telecom and broadband infrastructure and fostering technology development and innovation are key to India’s inclusive growth. Policy recommendations made during the year revolved around addressing the financial stress in the telecom sector, telecom infrastructure and for improving ease of doing business in the sector. Discussions were also held on creating a regulatory framework for Over-the-Top (OTT) communications. The initiatives and outcomes were aligned to the goals set for India@75 and for effective implementation of National Digital Communication Policy (NDCP), 2018 at the state-level.

e-Commerce

Given the potential of e-commerce to be a game changer for India, several initiatives were undertaken to build a harmonious ecosystem for this sector. Allying with stakeholders, including state governments, efforts were made to stimulate inclusive growth and facilitate capacity building within the country. Recommendations were submitted to the government on the draft e-commerce policy and the draft consumer protection guidelines and rules on e-commerce.

IT and ITeS

Work in the IT and ITeS sector revolved around giving a thrust to Artificial Intelligence (AI) application in sectors such as agriculture, healthcare and education. Discussions with the government were undertaken with the objective of developing a conducive policy framework and providing incentives for strengthening the ecosystem for fostering R&D, technology development and innovation. Recommendations were made for the Draft Information Technology Intermediary Guidelines (Amendment) Rules 2018.
to replace the rules notified in 2011. Going forward, programmes will be launched to drive an IT ecosystem development by forming an alliance between IT service providers and other stakeholders, including central and state governments. The objective will be to stimulate inclusive growth, facilitate capacity building and ease of doing business in the IT sector and develop digitally transformed states.

**Cyber Security**

With the government’s initiative to link Jan Dhan - Aadhaar - Mobile (JAM) trinity, digital penetration in India is accelerating. This landscape enhances the criticality of cyber security at the national level. In this backdrop, CII constituted a Task Force on Public Private Partnership for Security of Cyber Space. Working Groups (WGs) for skill and quality of human resources, increase in R&D investments, data localization, standards and legal framework were formed to explore opportunities and role of PPP. A report to be submitted to the National Security Advisor (NSA) and other relevant ministries is being consolidated based on the recommendations of these WGs.

**ACTION**

**International Engagements**

The 5th India Cyber Security Mission to Israel, coinciding with the Cyber Week 2019 at Tel Aviv University, Israel, focused on the cooperation between CII and TAU. A steering committee meeting was held to explore future prospects in cyber and emerging technologies such as artificial intelligence and machine learning.

A series of Best Practice workshops, organized in partnership with the Business Council for International Understanding, USA (BCIU), were aimed at increasing collaboration between key stakeholders for promoting smart cities and digital India.

**India Focused**

Digitization has not only accelerated the growth of telecommunications industry, it has also transformed the fundamentals of conventional networks and business architecture on the back of technological advancements. With a view to creating an end-to-end digital ecosystem, the Digital Infrastructure Summit 2019 deliberated on the challenges and opportunities in developing a reliable and sustainable digital infrastructure and how it can become a driving force for the growth of India’s digital economy. The summit was organized with support from NITI Aayog, Ministry of Electronic and Information Technology (MeitY) and Department of Telecommunications (DoT).

A report on Enabling Sustainable Growth for the New Digital Businesses was released during the session on India’s e-Commerce sector. The report outlines the ways to develop a balanced policy framework that will enable the e-commerce ecosystem to grow unhindered while the regulatory framework introduces the requisite controls. India’s cyber risk and resilience were highlighted in the 2019 review report that focused on understanding the threats and planning the defence. The report that emphasizes the need for India to recognize the transformative, disruptive and game-changing role of cyber security, was released during the Conference on Cyber Security organized with support from MeitY and NITI Aayog.

Given that procurement of goods and services is an important function for both central and state government agencies, the Government e-Marketplace (GeM) was set up. A state-of-the-art public procurement platform, it is aligned to the objectives of Digital India initiative. The 3rd edition of the National Public Procurement conclave was thus organized in partnership with GeM, to highlight the opportunities in public procurement and for sellers to showcase their products and services. Close to 40 CII-GeM Buyer-Seller workshops, held in partnership with GeM, were aimed at helping buyers and sellers registered on the platform. They were handheld through the steps involved in selling on the platform, used also for addressing the challenges being faced by the buyers and sellers.

Building a positive customer experience, the single most important factor for success, is a key challenge faced by organizations irrespective of their size, sector or business model. In this context, the CII Awards for Customer Obsession were institutionalized to promote such a culture in the Indian industry. The 3rd edition of the awards, held in New Delhi, recognized customer centric organizations for their practices and performance.
Projects

Proposals for setting up Model Centres of Excellence (CoE) were submitted to MeitY, with a view to making Indian industry AI ready and for driving its adoption across education and agriculture. MeitY has agreed to fund the Centre of Excellence NICCS (NIELIT-CII Centre of Excellence for Skills) in Aurangabad, which will implement advanced technologies in vocational training to effectively skill youth on a large scale. Industry collaboration, a key element of the project, will focus on developing learning scenarios to reflect the real time industry needs. CII and NIELET will sign a MoU for successful implementation of the CoE.

A proposal was submitted to MeitY for setting up a model CoE to harness AI’s potential in bringing about changes in the education sector by supplementing pedagogy and establishing systems to inform and support decision making across stakeholders and administrative levels. Based on the concept of smart farms outlined by the working group on agriculture, a proposal for a Model CoE for agriculture was also submitted to MeitY.

To accelerate the Digital India initiative across the country, CII is working at the state-level in collaboration with MeitY, to identify key challenges and ensure that solutions developed by Indian start-ups/ technology companies are contributing to strengthening the initiative.

Artificial Intelligence

Artificial Intelligence (AI) is the next frontier of technological disruption. It will make a deep impact on industry, jobs, governance and the economy of most nations. India, being the fastest growing economy, with the 2nd largest population in the world, has a significant stake in the AI revolution. While there are various government initiatives to adapt AI, a draft working paper titled ‘National Strategy for Artificial Intelligence #AIforAll was developed by NiTi Aayog.

Recognizing the potential of AI to transform economies and to take the government’s AI vision forward, CII constituted the AI Forum in 2019. Spearheaded by industry leaders, the forum is working with a long-term vision to create a strong ecosystem by building customized AI solutions for the industry.

Action

The forum is working towards establishing a CoE in Artificial Intelligence. The centre will play a pivotal role in increasing competitiveness as well as building capabilities and capacity across Indian industry through consulting, brainstorming, advisory services, certification, training and assessment.
India’s education system needs to transform in terms of both the curriculum as well the pedagogy to meet the challenges of the future of workplace, while delivering on the aspirations of the youth entering the education system. CII works in higher education space to promote industry-academia linkages, with the twin objective of improving the quality of output from the education system and helping the industry benefit from a steady supply of high-caliber human resource. During 2019-20, the CII Education Council, comprising both school and higher education, focused on promoting excellence and quality in education and highlighting private sector’s contribution to this cause.

**ADVOCACY**

The draft New Education Policy (NEP) released by the Ministry of Human Resource Development, was a key milestone in the education space. The policy explicitly recognizes India’s deep learning crisis, and the challenges of access, equity, quality, affordability and accountability. A CII delegation had submitted recommendations on the new policy to Dr Kasturirangan, Chairman, Committee on Drafting of New Education Policy. Most of CII’s inputs to the policy document found place in this draft. Further, on release of the draft policy, a roundtable on the draft Education Policy was organized and feedback collated was also shared with the government.

Some areas emphasized for a rethink include strengthening industry-academia interaction by incentivizing industry funding of research projects in higher education institutions; faculty sabbaticals in industry and relaxing faculty selection norms so that more experienced industry professionals can participate in teaching. The concept of ‘Professor of Practice’ was proposed to encourage experienced industry professionals who do not hold a PhD, to serve as regular faculty in institutes of higher learning. Flexible post graduate programmes with multiple exit options was also suggested for professionals.
ACTION

While the government engaged in refining the education policy framework and internationalization of higher education, industry and academia in India have, over the past few years, collaborated in several areas. CII works to bring industry and academia closer together through several initiatives. One such initiative, the annual Education summit, discusses the importance of enhancing R&D investments as well as collaborative research between industry and academia.

During the summit, CII launched two industry-readiness programmes for college students. To enhance their employability, two soft internship certified programmes were launched. The six months Campus to Corporate programme includes monthly industry visits and interactions with industry leaders. The Smart Manager programme is spread over a four-month period and is delivered in digital mode only.

The second programme under this - CII Industrial Proficiency Aptitude Test for Engineers (CII iPATE), will assess the industrial proficiency of engineering graduates. It is expected to become the benchmark exam for those wanting to make a career in the private sector.

A total of 10 awards, based on the 8th edition of the AICTE-CII Survey of Industry-linked Technical Institutes, were announced during the summit. While the pharma award continued to be supported by Cadila Pharmaceuticals, KHS Machinery India supported the best industry-linked technical institute in mechanical engineering.

The Prime Minister’s Fellowship for Doctoral Research, a public-private partnership (PPP) with Science & Engineering Research Board (SERB), DST, is aimed at attracting science and engineering talent for doctoral research, nurturing leadership qualities in scholars, providing exposure to international best practices and innovations and encouraging industrial research in academic institutions.

The scheme has an annual provision to award up to 100 new scholarships of up to INR 10 lakh per annum per fellow for a maximum of four years. Over 200 fellowships amounting to roughly INR 25 crore have been conferred since 2013, under the scheme supported by over 75 institutes and over 150 companies. While the PM fellows have received 19 prestigious awards, 45 patents have been filed as a result of research work done under this scheme.

Apart from the Annual Status of States in Higher Education (ASHE) 2019 which includes the state-wise education-related schemes and regulations, the need for internationalization of education was emphasized through the EdCIL-CII survey on Internationalization of Indian campuses 2019 and CII-PwC note on Internationalization 2019.
Design can help companies become innovative and cost effective, thereby preparing them for survival in an increasingly complicated market. Despite this fact, use of design by industry and businesses in India, remains limited. In this backdrop, CII National Committee on Design has, over the last 18 years, encouraged design as a tool for business competitiveness and innovation.

**ACTION**

The Design summit, organized in collaboration with National Institute of Design (NID) and India Design Council (IDC), focused on the need for augmenting design strategies to drive the development of both the rural and urban sectors as well as serve the bottom of the social pyramid. The approval of the Goa Design Institute by the Chief Minister of Goa was appreciated, both by the government as well as the industry, as the right step to promote design in the state.

The Design Excellence Awards, an acknowledgement of innovation and originality of Indian design, continued to evangelize the use of design by the industry. A total of 28 applicants emerged as winners in the top three categories of visual communication, industrial and interaction design and the Pearl Academy Award, a special category. The 5th edition of the India Design Book, released at the 19th India Design Summit, bore testimony to the development and growth of India’s design sector. This annual publication provides a gateway to promoting design intensive products and services, designed in India, for the global market.

Design was projected as a vital component of economic development, system operations, and overall quality of life during the 3rd edition of the India Design Show, held in partnership with the IDC and Government of Telangana. Exhibits on humanizing design, an experiential zone and a design walk brought design and design thinking closer to the common people.

Students from design and engineering colleges participated in the Design Challenge during the Design Week, held in partnership with the Government of Telangana. The award ceremony was held during the Hyderabad Design Week, hosted by Government of Telangana, in collaboration with World Design Organization.

A report on Introducing Design in the School Curriculum proposed that CII could anchor design workshops in CBSE schools, prepare course material and training modules for teachers. It has also proposed a slew of activities to be undertaken with students in government schools and budget private schools and the development of a course on Design Thinking.

Finland, known as the design nation, recognized the importance of design centuries ago. A 22 member Mission on Design visited Helsinki, Finland to learn and promote design excellence in Indian industry.

*Dr Mridula Sinha, Governor of Goa conferring the design award on one of the winners at the Design Excellence Awards in Goa*
CORPORATE - START-UP
BUSINESS CONNECT

For start-ups to grow and effectively contribute to the country’s economic growth, newer strategies that will improve their success rate are called for. A key reason for a start-up’s failure is its misunderstanding of and disconnect with the market needs. CII’s focus on providing the essential ‘Corporate Connect’, addresses the challenges of market reach and access faced by start-ups. The premise is that adoption by a large corporate house gives start-ups access to nurturing with specific knowledge inputs as well as financial support.

ADVOCACY
Unleashing the entrepreneurial talent of the country requires industry to provide mentoring, investments, out-sourcing to start-ups and others in the incubator. Efforts also need to be directed at facilitating investments in start-ups by industry, government, VCs amongst others. A MoU was thus signed with Hunch Venture/AIC – Pinnacle to collaborate towards these objectives.

A MoU was also signed with the Ministry of Electronics and Information Technology (MeitY) to strengthen the Corporate-Start-up Business Connect platform. Aimed at encouraging the adoption of electronics and IT start-ups by industry, it will also facilitate mutual soft-landing platforms for start-ups between India and other countries.

ACTION
The Invest Saudi: Expansion Beyond Borders for Indian Start-ups organized in association with the Saudi Arabian General Investment Authority (SAGIA) showcased the opportunities for Indian start-ups in Saudi Arabia. The SAGIA leadership, public investment fund of Saudi Arabia, Softbank, noted venture capitalists and start-ups of the Kingdom, amongst others, joined the CII delegation in discussions around SAGIA’s offerings and the business support that can be extended to Indian startups. Some areas/sectors that have the potential include chemicals, IT, energy & water and healthcare amongst others.
A 5-day Mission on Innovation and Entrepreneurship to the United Kingdom, covering London, Cambridge, Edinburgh and Manchester, and Dublin, Republic of Ireland was led by Mr Kris Gopalakrishnan, Past President, CII, Chairman, CII Start-up Council and Chairman, Axilor Ventures & Co-Founder, Infosys. The delegation comprised 32 delegates, and included more than 15 start-ups, 8 representatives from small and medium sized companies and an equal number of representatives from the academia.

The programme kicked off with an introductory session on UK India Tech Partnership chaired by Mr Fergus Auld, Head of South Asia, Foreign & Commonwealth Office, followed by an overview of the UK’s industrial strategy by Professor John Loughhead, Chief Scientific Advisor, Department for Business, Energy and Industrial Strategy highlighting the challenges and the responses from the industry and government. The delegation also met the Deputy Mayor of London and Chair, London & Partners, Mr Rajesh Agrawal.

The delegation visited Cambridge University, TechUK, RocketSpace, a leading London co-working accelerator for tech start-ups. In London, the visiting group called on the High Commissioner of India, Mrs Ruchi Ghanashyam apprising her of the mission’s objective, agenda and expectations.

As an extension to the visit, the group visited Ireland (Dublin), where they were hosted by the Ireland India Business Association (IIBA) to familiarize them with the culture and opportunities offered by Ireland. The delegation also visited the UCD Nova, a part of UCD Research and Innovation unit, a hub of innovation-related activities in the University.

At Edinburgh, the delegation engaged with the Scottish Development Institute followed by a visit to the Bayes Centre that houses world-leading data science and artificial intelligence research.

The Manchester India Partnership team explored regional opportunities in the Northern Powerhouse region. CII is a founding board member of the Manchester India Partnership and has also prepared a report documenting opportunities in the region. CII delegates also visited The Landing, a world class start-up co-working space and the University of Salford and the University of Bolton, followed by a visit to the Manchester Science Park.

A similar mission to Italy provided delegates an opportunity to meet a select group of companies, start-ups, incubators, research facilities, universities, investors as well as government officials. Apart from attending the FARETE, 2019, a two day exclusive business show, the delegation visited Sapienza University of Rome, LVenture Group, University of Cagliari in Rome, and held meetings with Ambassador of India to Italy and Municipal Commissioner of Bologna.

The CII Start-up Council held five regional meetings to get industry buy-in on the CII Corporate-Start-up Business Connect. The meeting was attended by corporates, investors & incubators and key stakeholders of strategic interest to growth of incubators as well as start-ups.

Alternate Assets Class is one of the most preferred investment allocations in the Family Offices portfolio, of which start-up asset is a part. A workshop on this subject, organized in association with Waterfield Advisors, Chiratae Ventures and Indian Private Equity and Venture Capital Association (IVCA), was thus aimed at drawing investments from the Indian family office into start-ups.

The forum, intended to develop a deeper understanding of the alternative investments space, touched upon the important points to consider while investing and analyzing opportunities available in the PE/VC space.
Affirmative Action
Aspirational Districts Development
CII Foundation
Development Initiatives
India@75
Indian Women Network
Sports
Youth Power
AFFIRMATIVE ACTION

Affirmative action for Scheduled Caste (SC)/Scheduled Tribe (ST) communities in India can be made both on account of historical deprivation, as well as on grounds of persistent disparity and continuing discrimination. Affirmative Action is viewed as a programme of compensation for historical injustice and very few would argue with the contention that SC/STs suffered deep injustices, disparity, deprivation and discrimination. It will be argued that in India, the current economic and social systems perpetuate patterns of caste-based disparities in all spheres of life whether it be education, occupation/work, income/consumption or health indicators. The continued presence of social and economic discrimination aggravates these disparities.

Affirmative Action for the SC/ST Communities is defined as a voluntary commitment by Indian companies to help the government and civil society in the national endeavour to ensure equal opportunity to members of these communities.

Responding to the government’s call to Indian industry to take affirmative action, CII proposed concrete steps for creating education and employment opportunities for the weaker sections of society. Towards this end, CII encourages industry support, member/non-member companies, to create sustainable models to empower the weaker sections to productively participate in the economic mainstream and in the nation building process.

CII’s Affirmative Action Plan aims to deliver model success stories that can be scaled up for more inclusive development. Success in integrating marginalized communities into mainstream economic activities will come from concerted efforts from both government and industry, together with leadership at the highest levels.
Greater economic participation cannot come from reservation in jobs, but through capacity-building and talent value addition.

With this backdrop, efforts were based on four broad areas, called the 4Es: Employment, Entrepreneurship, Employability and Education. Over the years, the 4E approach has provided a thrust to the overall effort of upliftment of the SC/ST community.

**Employability**

A series of skill development initiatives for youth were implemented through skill hubs, PanIIT gurukuls and skill projects, amongst others. The PARFI-CII Gurukuls have impacted the SC/ST youth in backward districts of Jharkhand, Chhattisgarh, Odisha and West Bengal. Industry driven multi skill institutes, set up in backward areas, have impacted a higher number of people from the SC/ST community.

**Entrepreneurship**

CII encourages its members to include companies owned by members of the SC/ST communities in their supply chain or appoint them as vendors. Initiatives such as Buyer Seller meets helped to link procurement teams of large member companies with SC/ST entrepreneurs. Vendor development programmes were also carried out in the cities of Ahmedabad, Aurangabad, Bhubaneswar, Coimbatore, Cochin, Indore, Rajkot, Surat and Vijayawada.

**Education / Scholarships**

Member companies continued to extend scholarships to SC/ST students to pursue higher education in streams such as engineering, medicine and humanities. Schools were also adopted by member companies to help provide scholarships to deserving SC/ST students requiring financial aid.
CII continued to work closely with the Government of India and the allied entities such as NITI Aayog, Ministry of Skill Development & Entrepreneurship and Ministry of Tribal Welfare to facilitate industry partnership and participation towards national priorities and programmes. One such initiative is the Transformation of Aspirational Districts Development programme, launched by the Prime Minister of India in January 2018, which remains a policy priority for the Government of India. With a vision to improve ease of living in an identified 117 aspirational districts, the programme is anchored by NITI Aayog.

In support of the Government of India’s initiative, CII National Aspirational District Development Committee works in a focused manner in aspirational districts and encourages members to undertake development work for the benefit of local communities. The Committee comprises of industry members and key stakeholders such as academia, NGOs and multilateral agencies. A series of initiatives were launched across aspirational districts in health and nutrition, education, skill development, financial inclusion, basic infrastructure & agriculture and water resources.

**ACTION**

**Employment Linkage**

NITI Aayog’s efforts are supported by the CII Model Career Centres (MCC) set up in 27 aspirational districts. These industry led employment exchanges offer career counselling for youth based on psychometric assessments, soft skills and pre-employment preparatory training and provide placement services. A reservoir of skilled talent pool, the centres aim to enhance employability in the aspirational districts, and leverage the CII employer connect for facilitating placements.

**Skill Development**

Several skill development initiatives were undertaken in the aspirational districts. These led to 150 youth from...
Goalpara being trained in trades such as retail sales, sewing machine operations and also being placed in jobs; 150 youth from Ranchi are undergoing training in business correspondence, business facilitation & sewing machine operations and will be subsequently provided jobs; another 150 from Nandurbar were trained as assistant electricians and subsequently placed; 150 youth from Baran were skilled in field technician computing and peripherals and were placed and yet another 150 from Jaisalmer were trained as business correspondents, business facilitators or self employed tailors.

The 36 PARFI-CII Skill Gurukuls, set up in partnership with PanIIT Alumni Reach for India (PARFI) continued to operate on a unique self-sustainable model with 100% placement.

Livelihood Generation
The focus on entrepreneurship and skill development was driven in the 27 aspirational districts by training youth and helping them set up their own small business units. Members took several of these youth under their mentorship.

Sanitation and Hygiene
Sanitary napkin vending machines were installed in rural government schools in East Singhbhum and awareness sessions on menstrual hygiene were organized on a regular basis.

Agriculture
Agriculture holds a place of primacy in the Indian economy given its potential to provide livelihood opportunities to a vast majority of the country’s population and place the economy on a higher growth trajectory. The agriculture sector, by employing 44% of the population and contributing 16% to the gross value added (as per the latest PLFS Survey), remains crucial to the overall stability of the Indian economy. Over the years, the sector has made rapid advancements in achieving the goals of food security, availability and accessibility.

In this backdrop, farmers from select aspirational districts were trained in organic cultivation, farming mechanization & soil cultivation, solar farming and rotational cash crop. The youth in Khunti district, Jharkhand were encouraged to undertake bee-hive cultivation and subsequently sponsored and helped in branding and marketing the products.
Over the last nine years, CII Foundation (CIIF) has engaged with the government, industry, academia, and a host of other partners towards strengthening the connect between corporates and communities through social development. Having re-strategized its areas of focus in 2018, the Foundation centered its interventions on three key areas - climate change resilience, women empowerment, and early childhood education by collaborating with diverse stakeholders and channeling expertise towards grassroot level transformation.

During the year, ongoing initiatives were scaled up to maximize the outreach and intensify impact. Bolstering the efforts to curb air pollution caused by stubble burning, the Crop Residue Management Initiative continued with a multi-fold scale up; the Woman Exemplar Program continued to recognize and empower grassroots women leaders. Industry support was mobilized towards taking the Anganwadi Adoption Program forward.

**CLIMATE CHANGE RESILIENCE**

**Crop Residue Management Initiative**

Taking the learnings and insights from the 2018 pilot, the Crop Residue Management Initiative was scaled up significantly by providing farmers with tools and technologies to manage crop residues and encouraging them to not burn crop stubble. In 2019, the initiative expanded its reach to 147 villages (full adoption of 105 villages and demonstration in 42 villages) across Barnala, Ludhiana, Patiala in Punjab and Rohtak, Fatehabad and Sirsa in Haryana, covering over 1 lakh acres of farmland and engaging more than 20,000 farmers. Rolled out in association with Punjab Agricultural University, Haryana Agricultural University, Punjab Pollution Control Board and Department of Agriculture and Farmer Welfare, the initiative has also received the support of corporates such as ONGC, BPCL, GAIL, Birlasoft, CLP India, Royal Enfield, PTC Financial Services, SIAM, Cummins, ReNew Power, and Rau’s Study Circle.
This year, the emphasis was on building further on the in-situ solutions for crop residue management, while researching and exploring ex-situ solutions. The constant engagement with farmers and awareness creation resulted in adoption of alternate technologies in 93% area of the adopted farmland, leading to massive reduction in stubble burning in the villages across the intervened geography.

Several corporate volunteers also joined the efforts and the general citizenry was engaged through awareness drives, field visits, media and stakeholder interactions. College students from Delhi visited the fields to understand the stubble burning issue from the farmers’ lens.

Water Resource Mapping, Planning and Conservation

To enhance water supply and manage demand through all-inclusive interventions integrating community action and technology, a water resource mapping, planning and conservation initiative was implemented in partnership with CII-Triveni Water Institute (CII-TWI). The CII WATSCAN tool was implemented across four water scarce villages of Aurangabad. These villages are also covered under the government’s Jalayukt Shivar Abhiyan and the Social Transformation Mission.

Further to the supply side interventions to enhance water storage and availability, this year, the initiative focused on mitigating water demand and utilization by introducing less water consuming agri-based livelihood options; shade nets to control evaporation and temperature; and awareness on better irrigation practices. These helped reduce water demand by 2300-2500 cu.m/H at the farm level. With an integrated approach towards building drought resilience, the initiative has interwoven technology and digital solutions with community ownership and behaviour change. These activities have together helped save about 4 billion litres of water since 2017. The project is being scaled up to another 20 villages in Aurangabad and Solapur and is supported by Standard Chartered Bank.

Restoration of Water Bodies

In response to the devastating 2015 Chennai floods, an initiative was rolled out to restore the area’s dilapidated lakes and water bodies that were disappearing due to encroachment, garbage dumping and lack of maintenance. The initiative drove the restoration and maintenance of water bodies through active community participation, awareness and capacity building amongst the local communities. The project, being jointly delivered by the CII Southern Region Water Alliance and the CII Foundation Tamil Nadu Relief and Rehabilitation Initiatives, is supported by Grundfos Pumps India Pvt Ltd, Danfoss Industries Pvt Ltd, and GMMCO Ltd. The restoration of lakes has resulted in improved tank storage capacity and catchment areas of water bodies, better drainage systems and increased recharge of drinking water sources, benefitting over 10,000 people. So far, eight lakes have been rejuvenated, while restoration of two lakes is underway.

WOMEN EMPOWERMENT

The Woman Exemplar Program (WEP), in its 15th edition, continued to identify, recognize and support unsung grassroots women change agents, who have overcome...
grave personal challenges and contributed to their communities in the sectors of health, education, and micro enterprise. Transcending unfathomable challenges, 15 extraordinary change makers joined the Woman Exemplar guild of 80 women change makers, reaching out to over 2 lakh people from the most underserved communities. These finalists were mentored by sector experts and exposed to leadership workshops to help them scale their initiatives. They also underwent capacity building training in networking, fundraising, leadership, and NGO management. Over the last year, the program provided these women exposure through multiple CII platforms and social media, raised over INR 2 crore for their programs, and provided access to multiple partnerships and resources.

**EARLY CHILDHOOD EDUCATION**

The early years of a child’s life lay the foundation for their learning and holistic development. Focus was thus drawn on strengthening early childhood education for the most vulnerable groups in the society, by strategically working with the government, corporates, and NGOs. Efforts were commenced to create 67 community led and owned model anganwadi centres across Kolkata and Ramban, with a focus on health, hygiene, and learning.

**DISASTER RELIEF AND REHABILITATION**

**Rehabilitation Interventions in Kerala**

Post the immediate relief measures for victims of 2018 Kerala Floods, the efforts to provide strategic long-term rehabilitation support, resulted in an MoU with the state departments of health and education. Severely dilapidated education and health facilities in Ernakulum were identified for restoration in consultation with the state government, which will directly reach out to over 5 lakh beneficiaries annually. The restoration is being undertaken with the vision of building structural resilience and enabling green, energy efficient infrastructure.

**Rehabilitation Interventions in Tamil Nadu**

As part of the Gaja Cyclone rehabilitation initiative, a project was launched to help the fishermen revive their livelihood through infrastructural support. Provision of fish auction hall and renovation of severely damaged net mending halls were undertaken as a part of this project. Discussions with the community helped identify opportunities in creating a platform for sustained expansion by strengthening the livelihood value chain for the community.

**Rehabilitation Interventions in Uttarakhand**

The rehabilitation of communities affected by the flash floods in Uttarakhand in 2013 was driven through quality education, livelihoods, environment, skilling water and sanitation interventions. Efforts to promote disaster preparedness, overall health and hygiene continued with outreach to 7,000 students and setting up 50 libraries in primary schools across Rudraprayag district.
Despite phenomenal growth, India deals with economic disparities across regions, states, sectors and communities. For the country to achieve long term growth, it is essential for every Indian to be folded into the growth process. CII thus drives the agenda of inclusive and sustainable growth by engaging with the government, industry, and civil society organizations.

CII’s vision towards this objective is to create an enabling ecosystem that catalyzes a positive impact by industry on India’s development journey, through Corporate Social Responsibility (CSR). Collaborative industry action towards large scale, high impact interventions assists members in meeting their social development aspirations by integrating businesses with social development.

CII also promotes industry engagement towards inclusion, with a special focus on Persons with Disabilities (PwD).

ADVOCACY

Working towards making CSR an actionable business agenda for inclusive and sustainable growth, CII actively engaged both with the government and the corporates.

Legislation, passed by the government in 2019, focuses on CSR compliance and spends. Recommendations were presented to the High Level Committee on Corporate Social Responsibility (HLC), constituted by the Ministry of Corporate Affairs (MCA), towards a roadmap for a coherent CSR policy. Some of the key CII recommendations focused on the need for a flexible CSR regulatory framework; creation of enablers for smooth CSR implementation and a stronger framework for evaluating & analyzing CSR outcomes. These suggestions were included in the final HLC recommendation report. The concern on treating violation of CSR norms was addressed by a government decision to treat these as a civil offence rather than a criminal offence.

Since 2006, CII has been working towards mainstreaming PwDs into the workforce. To facilitate inclusion of PwDs and workplace diversity, CII, in partnership with ILO and EFI, has created India Business and Disability Network (IBDN). CII-IBDN promotes PwDs employment while responding to the needs of the private sector. IBDN works to engage, enable and empower PwDs, by...
promoting and facilitating an inclusive, accessible and a barrier-free workplace within the corporate sector. To promote PwD inclusion at workplace, a recommendation paper was developed by CII-IBDN. It focuses primarily on tax incentives on expenses incurred on accessibility and inclusion.

ACTION

Corporate Social Responsibility

With a view to promoting an impact oriented approach, corporates were encouraged to adopt initiatives that make them integral contributors to development. Towards this end, initiatives in water were given a thrust during 2019. Given the importance of water in the present ecosystem, an exercise was undertaken to identify, compile and document CSR interventions towards water accessibility, rejuvenation and revival.

Against the backdrop of a changing landscape, the annual CSR Summit, held in New Delhi, was themed CSR 3.0 - The Road Ahead. A key platform for furthering the CSR movement, the discussions at the summit revolved around India Inc’s preparedness for the shift in CSR landscape. The focus was on critical issues such as the recent amendments to the CSR legislation; solutions to the air pollution challenge; industry’s role in addressing the water crisis and the key enablers/disrupters of CSR in future.

The roundtable on Alignment of CSR with SDGs – Sector Focus: Water, organized in partnership with GIZ, explored the possibilities of corporate engagement towards replicating and mainstreaming the models through CSR. The scope of CSR alignment in addressing the water issue, its importance for India Inc, the government’s vision and action towards water issues were deliberated upon during the session.

The publication of inspiring Water Stewardship stories of about 15 exemplary companies, titled India Inc: Going Beyond the Fence was launched at the summit. These case studies depict how companies have gone Beyond the Fence, to improve the quality of life among the communities.

To help companies connect and identify quality and impactful projects to meet their CSR aspirations, a publication titled Moving the Growth Story Forward through Inclusive Partnerships, was developed in partnership with BSE Sammaan. The publication comprised of 46 development projects offered by grassroots NGOs across India. These projects focused on key thematic areas (as per Schedule VII) and were further mapped with respective SDGs.
Empowerment and Inclusion of Persons with Disabilities

A MoU was signed with the Sasakawa-India Leprosy Foundation (S-ILF) to drive industry action towards ending leprosy in India and fighting the stigma attached to it. The partnership was formalized in the presence of Dr Harsh Vardhan, Minister of Health & Family Welfare, Science & Technology and Earth Sciences and Dr Rajiv Kumar, Vice Chairman, NITI Aayog.

While harnessing the strengths of the Indian industry towards awareness, advocacy, and economic integration of the leprosy affected community, industry action will also be directed towards their upliftment through sensitization, skilling and livelihood programmes, and collaborative projects through CSR.

Over the years, work has continued towards mainstreaming PwDs into the workforce. CII-IBDN partnered with 'The Valuable 500', a global movement launched at the Word Economic Forum, Davos, that seeks to bring together 500 CEOs across the globe to commit to get disability inclusion on the boardroom agenda. As the India Country partner, CII-IBDN mobilized about 50 companies that committed to the Valuable 500 statement in India. India Inc.-The Valuable 500 was co-hosted with Brookfield Properties and EnAble India to celebrate and promote the inclusion movement. The event brought together India’s industry champions, civil society leaders, influencers and the founder of the Valuable 500 movement, Caroline Casey.

Four exclusive job fairs and workshops, held in partnership with Ministry of Social Justice & Empowerment, National Skill Development Corporation, American India Foundation & Spark Minda Group, facilitated PwDs employment in the industry. Member companies across sectors including hospitality, retail, IT, IT enabled services and manufacturing recruited PwDs during the job fair.
India@75, a CII initiative, is an industry-led, multi-stakeholder movement that seeks to define India by its moral, economic and technological strengths. A set of milestones that form the compass for this movement are laid out in the vision document ‘India@75 - The People’s Agenda’. This document has its genesis in the thoughts presented by Late Professor C K Prahalad, in 2009, to the then Prime Minister of India.

The India@75 Journey

On Sep 23, 2007 Professor C K Prahalad, at the behest of CII, presented a development blueprint for India to a select audience at the ‘India@60’ celebrations in New York. He envisioned an India of 2022, that would be at the world’s centerstage on the strength of its moral, economic and technological prowess. Based on this vision, tangible milestones were mapped to the parameters, as indicators, to leapfrog the process till 2022 or India’s 75th year of Independence, giving the initiative its popular moniker - India@75.

Professor Prahalad helmed rolling out of the initiative until his demise in April 2010. Thereafter, the CII leadership adopted the blueprint and set up India@75 Foundation in 2012 to mainstream the vision through three strategic approaches:

- Catalyze strategic collaborations with inter stakeholder groups for synergized efforts towards the milestones
- Identify ‘Next Practices’ that have the potential to bring transformative changes in their sphere and scale them up by leveraging the CII membership network
- Mobilize people’s participation in addressing issues of national importance.

2019: The Year in Retrospect

Restructuring of the National Volunteering Grid

National Volunteering Grid (NVG) is an online platform that connects Non-Government Organizations (NGOs) to different volunteers, thereby catalyzing collaborations on issues of common interest. It works on the insight that non-profits are often the last mile service delivery vehicles and therefore critical to India’s development landscape. However, many of these organizations have skill gaps that impact their organizational efficiencies and eventually their ability to deliver on ground. Strengthening these NGOs is a strategic way to address the issues they pursue.

While several professionals are willing to volunteer skills, either on their own or because of an organizational mandate, there is no platform that acts as a repository of such pro-bono activities. NVG fills this gap by listing curated pro-bono activities and connecting professionals to NGOs that need specific professional interventions for capacity building. This facilitates the transition from a mere funding to sustainable corporate – NGO relationships. A general activity calendar lists verified and meaningful volunteering opportunities for common people.
In 2019, India@75 Foundation redesigned the NVG Platform using contemporary technology and dynamic functionalities. The intent was to create a platform that would not just better facilitate structured volunteering in the country, but also make volunteering a pleasant experience. The latest NVG version has the following functionalities:

- Industry members can upload and showcase volunteering activities and data
- Companies, including MSMEs, can use the portal to manage their employee volunteering programmes/activities
- Registered entities can schedule and promote volunteering activities on the calendar
- NGOs can upload their pro-bono projects on the portal for selection by corporate/professional volunteers
- Stakeholders can upload volunteering stories and share them via social media.

Of the approximately 2,050 NGOs and 1,214 projects registered on the NVG portal, 81 projects have been delivered by volunteers. Apart from the online platform, India@75 also works offline to promote the pro-bono culture amongst professionals. The pro-bono capacity building workshops for NGOs, organized at Kolkata, Bhubaneswar and Ranchi in partnership with the Sukalyan Welfare Society were attended by more than 150 NGOs leading to about 300 projects being registered on the portal.

**Organizing National Volunteering and India@75 Weeks**

The annual National Volunteering Week (NVW), held from 18-24 January since 2014, aims to strengthen the volunteering ecosystem and culture in the country. Since its inception NVW has generated 2,743,261.5 volunteering hours. The 7th edition generated 95,245 hours across 56 locations and resulted in 10,144,762 people benefitting from the effort.

The India@75 week, held in August every year, provides stakeholders multiple platforms to showcase their work. The 5th edition of the week continued to facilitate exchange of ideas and trigger important conversations and collaborations. Through the volunteering activities, 1,254 volunteers clocked in 4,572 volunteering hours in 10 states impacting 10,083 people.

India@75 Task Force presented the foundation’s work at an India Volunteering conclave organized by United Nations Volunteers programme and Ministry of Youth Affairs & Sports, Government of India. Papers on the economic value of volunteering were also presented during the conclave held in New Delhi.

**Design and Piloting of Functional Literacy Programme (FLiP)**

In India, digitalization is an economic as well as social development opportunity, in the context of functional literacy. However, the country runs the risk of losing this opportunity given that target groups are not aware of how they can leverage technology to their advantage.

To address this, India@75 designed a 90 hours modular course called the Functional Literacy Programme (FLiP). It is a people-led digital empowerment programme that helps the unorganized sector understand how digitalization can be used for general and economic betterment. Digitized course content, along with
an implementation toolkit, is available free of cost on the India@75 website. Implementation requires minimal resources, content can be delivered in parts i.e. digital, financial or basic literacy depending upon the beneficiary’s need. The 3i i.e. Industry, Institution and Individual can implement this programme using basic computers with internet connectivity.

In 2019, the focus was on:

• Implementing a pilot to evolve evidence-based scale up strategies. The pilots, conducted in Alwar, Delhi, Lucknow, Guna and Ranchi, impacted 620 beneficiaries
• The pilot phase included designing the course, evolving monitoring mechanisms, developing and implementing outreach strategies for both implementers as well as beneficiaries.

Going forward, India@75 will advance the 3i strategy to transform FLiP into a movement, by catalyzing participation of industry, institutions and individuals. The initiative, in congruence with UN Sustainable Development Goal number 4, can be adopted by corporates under the Corporate Social Responsibility (CSR) programmes. It can also be adopted for building capacity of internal human resources and other target groups in local geography by leveraging their existing infrastructure.

Initiation of the Blue Sky Cities
Blue Sky Cities (BSC) is a multi-stakeholder platform that endeavours to increase the number of good air quality days in a city through strategic interventions. A core BSC team, comprising representatives from India@75, Centre of Excellence for Sustainable Development (CESD), Green Building Council (GBC), CII Foundation and Energy and Infra verticals of CII, was constituted in 2019. This team worked with the relevant state offices to initiate the formation of the Blue Sky Cities in Indore, Pune and Delhi NCR. It also initiated the process of evolving a City Action Plan (CAP) to identify the main pollutants in a city, undertake gap analysis, understand city systems and implement strategic interventions.

Each member of the core group is designated as a city champion responsible for co-ordinating with the respective CI office. Delhi is directly being driven by the core team due to its co-location. With support from the state government, industry and the community, Delhi’s credible progress resulted in its categorization as a model case study for processes and activities. Under the waste-management project to prevent burning of waste in Anand Vihar, a 1 ton/ day capacity composter was installed. Of the 5,000 targeted households, about 1,000 adopted waste segregation under this programme.

The core team explored the ground issues through meetings with various stakeholders in Indore and Pune. The framework design and draft Terms of Reference (ToR) will be followed by meetings with respective city collectors and commissioners to get their buy in. Going forward, the team will commission a source apportionment study to evolve and design interventions.
The CII National Committee on Women Empowerment and Indian Women Network (IWN) is committed to co-create ecosystems that enable women to harness their full economic potential. This objective is achieved through advocacy, knowledge creation and on ground interventions.

While promoting women’s participation, growth and leadership in the workplace, it serves as a platform for learning, knowledge enhancement and networking.

The network delivers on its agenda through its chapters located in 16 states, 7 zones and 1 union territory.

**ADVOCACY**

Under the aegis of CII National Committee on Women Empowerment and IWN, two surveys were launched to understand the nuances of what women feel and policies that could impact their engagement in the economic sphere.

The survey on Women on Work attempted to understand Indian women’s thoughts and feelings about workplaces. By analyzing women’s voices, from over 3,000 respondents across the country, it aims to provide pertinent and fine-grained inputs that were not easily available previously. The outcome of the research will provide new insights towards expanding women’s participation in India’s economic growth.

A survey of women from rural and semi-urban areas was initiated under the aegis of the CII National Committee on Women Empowerment and IWN, to assess gaps between their education, aspirations and professions. During the initial phase of the study conducted in 24 states, the respondents comprised of a representative sample of 400 women. The survey has revealed valuable insights about women’s aspirations in engaging better with the economy.

The findings of the survey analysis would serve as a reference for industry and relevant stakeholders towards enhancing participation of women in the workforce.

**Capacity Building Initiatives**

CII IWN Leadership Mentoring programme, a cross-company initiative, is aimed at supporting top women leaders as mentees and CEOs and senior management as their mentors.

The initiative is targeted towards professional and personal development to help the mentee grow, excel and advance more effectively. The initiative will be scaled up based on the learnings from the one year pilot programme launched in Chennai and Mumbai in September 2019.

A Campus to Corporate programme is aimed at triggering a shift in thinking, attitude and behavior of a student to become professionals.

To drive this programme trainers were initiated into various courses to equip them with skills to conduct the training for pre-final undergraduate students.

**CII Gender Diagnostic Tool**

An online gender diagnostic tool has been developed to enable companies to assess themselves on their own level of inclusivity. The tool is also designed to provide insights on how companies can improve their performance across the assessment criteria.
The importance of physical activity has never been emphasized more than it is today. The government of India’s Fit India Movement also aims to encourage people to become healthy and fit by including physical activities and sports in their daily lives. Fit India is expected to become a catalyst in promoting fitness as a people’s movement.

In line with this mission, CII aims to develop grassroots sports by bringing together the powers of policy making and private enterprise towards the four pillars of fitness, business, education, and investment. Pursuing this vision since 2016, CII is making a significant contribution to achieving the vision of making 300 million children play sports for 60 minutes daily. A working model was propagated and implemented both with the central and state governments with the objective of making sports a compulsory subject in the school education system. While generating investment opportunities for grassroots sports through CSR, this model also envisages building a health and fitness culture through sports and using sports as a tool for holistic development, inclusion, equality and empowerment.

**ADVOCACY**

It is widely recognized that physical education and sports are important for children in developing an active and healthy lifestyle. They are also an effective and inclusive means for honing life skills and developing an understanding of lifelong participation in physical activity. With this backdrop, CII developed and began implementing a model for school sports education. The model includes School Sports Forum to generate awareness on the importance of integrating education, sports, capacity building and skill development of physical education teachers. Sports festivals to encourage mass participation in sports are also envisaged under this model.

The Making India Play and Fit India models were presented in Geneva during the 2nd Open Ended Working Group Meeting on Model Indicators on Sport and the SDGs. The meeting was hosted by the International Labour Organisation (ILO), and delivered by the Commonwealth Secretariat in association with UNESCO.
During the India Sports Summit, fitness targets and Olympic goals were defined by Shri Kiren Rijiju, Minister of State for Youth Affairs & Sports (I/C) and Minority Affairs, as the logical conclusion to Fit India. Organized along with the Ministry of Youth Affairs and Sports and Sportscom Industry Confederation, the Summit discussed fitness as a USD 10 billion opportunity.

During the 1st meeting of the CII National Committee on Sports and Vision Planning 2019-20, Member of Parliament (MP), Lok Sabha (Shillong), Shri Vincent H Pala; Dr Lorho S Pfoze, MP, Lok Sabha (Outer Manipur) and Dr Narinder Dhruv Batra, President, Indian Olympic Association, shared their valuable inputs for promoting sports in the North East Region.

The School Sports Forum held in Shillong and Jammu & Kashmir, explored ideas and ways to harness local potential and create a roadmap for integrating sports into education in the region. Inspirational stories from Bethany Society, Shillong and an exhibition Kabaddi match amongst school children were organized during the summit in Shillong. Participants from the government, education sector, physical education, sportspersons and NGOs in J&K witnessed inspirational stories of young women who have actively pursued a sports career as well as an exhibition football match amongst women players.

The First Kabaddi Fest saw participation of 16 teams (8 girls’ and 8 boys’ teams) from Delhi NCR schools. The festival aimed at harnessing young talent from schools towards making sports an integral part of education in the region and promoting Kabaddi in schools.

Several sports personalities were recognised throughout the year for excelling in sports. Some of these included Ms Heena Sidhu and Ms Esha Singh (Shooting), JSW Group, Athletics Federation of India, Odisha; Mr Esow Alben (Cycling); Ms Linza Fenny Syiem (Karate); Mr Aiborlang Khongjee, Mr Ishfaq Ahmed, and Mr Mehrajuddin Wadoo (Football) and Ms Bilquis Mir (Water Sports).
YOUTH POWER

YOUNG INDIANS

Young Indians (Yi), a CII initiative launched in 2002, is a movement for Indian youth to converge, lead, co-create and influence India’s future. With a membership of 3,200 young dynamic direct members and 29,500 college student members, Yi operates through a national network of 46 chapters with new chapters being launched in Bhavnagar, Hubballi, Rajkot and Ranchi.

INITIATIVES

Under its 3 pillars of Nation Building, Thought Leadership and Youth Leadership, Yi’s flagship projects made a positive impact through more than 3,138 activities touching the lives of 23,37,636 people across the country.

Project Masoom has, since its launch in 2015, created awareness on child safety and protection through workshops, sensitization campaigns, public rallies and awareness drives across the country. The 2019 edition of Yi Masoom saw over 3,29,409 stakeholders being impacted through more than 500 such initiatives.

The Gift an Organ (GAO) project, officially registered with the National Organ and Tissue Transplant Organisation (NOTTO), of the Ministry of Health and Family Welfare, continued its drive to increase organ donation awareness. Having collated 3,587 online pledges since 2016, GAO will continue to list future pledges on the official National Registry of Organ Donors. The GAO IPL Blood Donation Drive collected over 5,000 units of blood. Yi conducted 259 activities impacting 76,003 stakeholders across the community.

To drive home the importance of abiding by traffic rules and imbibing a sense of responsibility towards fellow citizens to avoid accidents and deaths, over 231 activities were organized under the road safety project. Causes such as the Good Samaritan Law guidelines were also highlighted through the year.

YUVA, Yi’s student initiative with 29,500 members worked to empower youth and engage them on nation building, innovation, entrepreneurship and skill building. Regional leadership camps, specialized on-campus programmes and chapter initiatives brought forward the voice and ideas of the youth.
With over 200 activities delivered through formats such as Yustart, Thunderbolt, Inner Circles, CEO Sessions and Workshops, Yi continued to create an environment to promote entrepreneurship as a tool for India’s development. A digital repository was launched to propagate the culture of innovation. This platform enables members, including YUVA, to share an idea or a grassroot innovation and provides the last mile connectivity of integrating aspirants into the innovation ecosystem.

Over 22,094 people, especially the focus stakeholder i.e. women, youth and children, were positively impacted by the 114 rural initiatives, delivered by 22 chapters. The Rural Champions Programme specifically worked in the areas of education, skill building, jobs, entrepreneurship, nutrition and health.

Engagement in emerging areas of climate change and accessibility was initiated with activities on water conservation, rainwater harvesting, disaster management and building ramps for improving accessibility. Knowledge enhancement of members facilitated through the Yi learning platform was a key focus, with membership engagement being increased through over 220 interactive sessions, company visits, workshops, ‘coffee with CEO’ sessions, learn from the legends and peer-to-peer sessions.

Yi Leadership Academy’s Fellowship Programme took 37 chapter co-chairs through an exercise of exploration, introspection and reflection on personal qualities and capabilities in their leadership journey. A capsule programme for co-chairs of new chapters was launched post the annual programme.

As part of celebrating the Mahatma@150 year, a series of 50 activities was conducted under the ‘Gandhi in Action’ programme with the intent to ensure that the Mahatma continues to be an inspiration for future generations. The Lathi relay, much like the Olympic torch relay, that started from Porbandar journeyed across the Yi chapters over 2 months, reinforcing Gandhi’s philosophy.

As a founding member of G20 Young Entrepreneurs Alliance and Commonwealth Alliance for Young Entrepreneurs - Asia Pacific, Yi championed international engagement and organized its annual delegation to the G20 Young Entrepreneurs Alliance (YEA) Summit in Fukuoka, Japan comprising of 16 young business leaders & entrepreneurs. Unique learning opportunities...
to experience and understand global best practices and the economic, cultural and business dynamics were leveraged through the missions to China and Republic of South Korea. Engagement forums were built through the UK-India Young Leaders’ Forum and India-Israel Young Leaders’ Forum, with a focus on sustainability, innovation and youth leadership.

The first ever mega youth event, titled Yi brings The FUTURE, a festival of the youth, by the youth and for the youth was hosted in Navi Mumbai. The platform brought together more than 15,000 youth over 100 days from across its 46 chapters to ideate, imagine and inspire about their future. Participants explored 3 major themes: Future of Life, Future of Leadership and Future of Experiences through various interactive formats.

BHARATIYA YUVA SHAKTI TRUST

India, along with the rest of the world has, for a very long time, been grappling with job creation for youth at the bottom of the pyramid. Innovative solutions are the need of the hour to engage local youth, to develop local products for local markets using local resources.

As India stands at the cusp of an extraordinary start-up revolution, Bharatiya Yuva Shakti Trust (BYST) envisages building and strengthening awareness for underserved aspiring entrepreneurs and emphasizing the importance of mentoring and its role towards building India’s Grampreneurs™.

By 2019, BYST had supported 8,240 entrepreneurs, handheld by 6,552 mentors. These Grampreneurs™ in turn have created more than a quarter of a million jobs.

Nationalized banks have provided funding of over INR 330 crore to BYST supported Grampreneurs™. BYST is a founding member of the Youth Business International (YBI), a global network of expert organizations in over 50 countries, supporting underserved youth to turn their ideas into successful businesses.

ADVOCACY

In a strategic partnership with CII, BYST engaged with various corporates including Bajaj Auto, Tata Steel, JK Paper, JCB and IFCI to support grassroots entrepreneurs and mentor them, in both urban and rural areas. During 2019 new partnerships were forged with JP Morgan and IKEA Foundation for operations in Chennai, Pune and Faridabad. Linkages were also built with local grassroots communities in Delhi NCR, Tamil Nadu, Telangana, Maharashtra (supported by Bajaj Auto), Odisha (supported by JK Paper in Rayagada) and Assam.

Over the next 5 years a rapid growth rate is envisaged in entrepreneurship, taking the current number of 1,000 entrepreneurs per year to 10,000 entrepreneurs per year, with a potential of creating 2.4 million jobs spread across India. This growth is feasible given growth track record of the past decade from 100 to 1,000 entrepreneurs per annum, through effective use of mentoring as a growth engine and judicious use of digital technology for outreach.

The flagship programme, Mentoring India™, unveiled by Shri M Venkaiah Naidu, Vice President of India in 2017, aims to create a pool of mentors at every touch point where a potential mentor currently interacts, to guide entrepreneurs and support them till the next stage. Mentors are trained to empower and provide mentoring to underserved entrepreneurs to become successful.
who in turn will create employment and wealth at the grassroots level.

**ACTION**
In continuation of the International Mentoring Summit series, a summit themed Empowering Young Grampreneurs™ to Create Jobs was organized to showcase the work done in Odisha in partnership with Tata Steel and JK Paper. Shri M Venkaiah Naidu and Prof Ganeshi Lal, Governor of Odisha graced the event that brought together over 700 industry veterans, mentors from different fields, and BYST’s present and potential Grampreneurs™. BYST Odisha Grampreneurs™ success stories on show- a booklet with compilation of successes created in Odisha’s Kalinga Nagar and Rayagada region with Tata Steel and JK Paper support, was released during the event.

The Global Youth Entrepreneurship Summit (GYES), organized by Youth Business International (YBI) in Columbia brought together 75 organizations and network members from over 35 countries, to help shape the future of entrepreneurship. BYST played a wide-ranging role during the sessions including delivering the keynote address on digital transformation, embedding mentoring - an innovative showcase and future facing business models.

**AWARDS & ACCOLADES**
Over close to three decades, BYST has nurtured thousands of entrepreneurs from the grassroots, many of whom have gone on to win both national and international recognition. Swapnil Kudale, a BYST supported entrepreneur, was one of the three global finalists of YBI’s ‘Young Entrepreneur of the Year’ award along with representatives from Sweden and Mongolia. Swapnil’s innovative start-up, Sky Power Industries, manufacturing radiators to cool transformers, has achieved a turnover of INR 1.5 crore generating 80 jobs within 18 months. BYST’s long serving mentor for over 20 years, Krishnan Narayanaswami, one of the top three global finalists under the Mentor Recognition Award, spearheaded mentor recruitment from roundtables, Rotary Club and Lions Club.

BYST supported Grampreneur™ Balwant Dhage, received the National Entrepreneurship Award 2019 in the textile category from the Ministry of Skill Development and Entrepreneurship. Hailing from an agrarian family, he has successfully launched his brand ‘Sewagram Khadi’ through his manufacturing unit.

During the year, BYST won the Business Star Awards category - Business Mentor (Institution) 2019, organized by Naanayam Vikatan, part of the 93-year-old Ananda Vikatan Group.
INTERNATIONAL BUSINESS DEVELOPMENT
India and the World

Multilateral Forums

Promoting Brand India

Trade Policy

Exports

Trade Fairs
CII’S GLOBAL FOOTPRINT AND INTERNATIONAL INITIATIVES IN 2019-2020

09 OPERATIONAL INDIA BUSINESS FORUMS
Australia, China, Egypt, Latin America and the Caribbean (LAC), South Africa, United Kingdom, United States of America

11 OVERSEAS OFFICES
Australia, China, Egypt, France, Germany, Indonesia*, UAE, UK, USA, Singapore, South Africa

02 CEOs FORUMS COORDINATED IN 2019-20
India
Malaysia CEOs Forum
India
Sweden Business Leaders Roundtable

* Launched in 2019-20
394 MoU PARTNERS IN 133 COUNTRIES
Indian economy’s increasing integration with the global economies, through trade and capital flows, has accelerated over the past two decades leading to a jump in the country’s GDP. Today, India is among the key players in the global economic landscape. The trade and policy reforms, efforts at improving ease of doing business and the country’s inherent economic strengths have made India a sought after destination for international business and investments.

As India continues to attract the attention of the world, CII endeavours to strengthen the country’s international engagement globally. CII reaches out to international businesses keen to engage with India and to Indian industry that wishes to access traditional and emerging markets overseas. During the year, efforts continued to be directed at developing market access for Indian exporters; identifying and addressing needs of the small sector to make it more competitive; promoting cooperation with counterpart organizations; and adopting a proactive partnership approach with foreign governments on various international issues concerning the Indian economy, amongst others.

**INDIA BUSINESS FORUM**

CII makes consistent efforts to promote Indian industry’s synergies with the world. In this regard, the CII-India Business Forum (CII-IBF) provides a platform to Indian companies operating in specific countries to come together and share information. The forum organizes and facilitates meetings with government officials and agencies to address issues facing members.

As the Indian industry’s voice, CII-IBF China continued to be a catalyst in furthering the vibrant economic relationship between India and China. CII-IBF not only helped members to further their business interests in China, but also established itself as the bridge for the Government of China and other agencies to interact with Indian companies. Opportunities were created for Indian companies to interact with and learn from the experiences of MNCs from other countries in China. Investment opportunities in sectors such as IT and software, textile, e-commerce, electronics, food, footwear manufacturing, etc available in the states of Maharashtra, Karnataka and New Delhi were showcased to the Chinese industry.

*From L to R: Li Chenggang, Assistant Minister, Ministry of Commerce, People’s Republic of China; Sun Weidong, Ambassador of China to India; He Lifeng, Vice Chairman, Chinese People’s Political, Consultative Conference and Chairman, National Development and Reform Commission; Rajiv Kumar, Vice Chairman, NITI Aayog; Chandrajit Banerjee, Director General, CII and Anna Roy, Senior Advisor, NITI Aayog at the India China Economic Cooperation Forum in New Delhi*
CII-IBF Egypt, over the past year, organized and facilitated meetings with various government officials and agencies to address issues facing the members. During a meeting with Dr Sahar Nasr, Minister of Investment and International Cooperation and other officials from the Ministry, challenges related to new regulations for investment, tax, customs and social security were highlighted. In addition, members’ meetings with potential partners, business associations and investment promotion authorities provided Indian companies the opportunity to explore investment and trade opportunities in Egypt.

Following a consultative process with the Indian diplomatic missions and the governments in the region, CII-IBF Latin American and Caribbean (LAC) identified issues relating to regulation, trade facilitation, tariff and non-tariff barriers and other challenges facing Indian businesses. Discussions during the year also revolved around arbitration, M&A, labour policy, taxes amongst other topics that would be relevant to the process and ease of doing business. Members engaged with the Argentinian President, Mr Mauricio Macri and other ministers from the country and a Chilean delegation led by Mr Eduardo Frei, Former President of Chile and Ambassador on Special Mission to the Asia-Pacific Region. A commerce and industries ministry delegation from Panama and a fintech delegation from Duque de Caldas, Brazil also met with the CII IBF LAC members. Memoranda of Understanding were signed with Argentina, Brazil, Panama and Uruguay to collaborate with partner organizations to give a fillip to the India-LAC economic relationship.

Members of CII-IBF South Africa highlighted the visa challenges faced by Indian businesses in South Africa. The session on South African Visa Unpacked provided insights into the existing visa regime in the country and the recently introduced changes to visa policies.

AFRICA

African economies registered an upward trend in 2019, with opportunities for trade and investment spread across several Sub-Saharan and North African countries. As the continent moves towards self-dependence, industrialization and a service-oriented environment, the African Union launched the operational phase of the Africa Continental Free Trade Area (AfCFTA), which is expected to become the world’s largest free trade area by number of countries, upon complete integration. AfCFTA will offer a continent wide single market for goods and services; allow free movement for business travellers and investments and streamline trade and attract long-term investments.

The Regional Conclave on India-Southern Africa Project partnership, held in Zambia, strengthened the dialogue for developmental partnerships between India and the 16 member countries of Southern African Development Community (SADC). Government officials of partner countries, multilateral institutions, business community, exporters, banks, Indian diaspora and other stakeholders identified business, trade and investment opportunities for Indian entrepreneurs looking to establish and expand their business footprints in the region, in the context of the broader South-South Cooperation. President of the Republic of Zambia, H.E. Mr Edgar Chagwa Lungu and Shri V Muraleedharan, Minister of State for External Affairs and Parliamentary Affairs, Government of India joined the proceedings.

The India-Africa Higher Education and Skill Development Summit, attended by over 200 delegates, was a first of its kind platform in India aimed at multi-level collaboration between India and identified African countries. Currently Indian investment in Zambia stands close to USD 5 billion, with potential for further expansion. H.E. Mr Edgar Chagwa Lungu, during a visit to India, invited India to harness this potential.

A 15 member business delegation to Tanzania, representing sectors such as infrastructure, power,
railways, manufacturing, software, renewable energy, education & skill development, telecommunications, engineering, automobiles and ICT, explored opportunities for collaboration. During the India – Tanzania Business Forum, MoUs were signed with Tanzania Private Sector Foundation (TPSF) and SADC Business Council.

**Asia**

**East Asia**

**China**

The India China Economic Cooperation Forum was organized in New Delhi, along with the International Cooperation Center of National Development and Reform Commission (ICC NDRC), under the aegis of NITI Aayog and NDRC, on the sidelines of the 6th edition of the Strategic Economic Dialogue (SED). Representatives of over 200 companies discussed and deliberated the way forward to strengthen the partnership between companies and institutions in sectors such as infrastructure, high technology, energy, resource conservation and environment. Further, CII participated in the NITI Aayog – DRC dialogue held in China, including a CII-IBF delegation and also organized two roundtables focused on IT and Pharma sectors.

A 32 member delegation, led by Mr Zhang Shengfeng, Vice Chairman of CCPIT, visited India to explore areas of mutual cooperation and promotion of trade and industry between the two countries. Specific initiatives that could be undertaken by both organizations, for furthering trade relations including institutionalizing a cooperation mechanism, were discussed.

**Japan**

For the first time, CII in partnership with JETRO, participated at the Tokyo International Conference of African Development (TICAD) Africa Alliance Zone Exhibition in Yokohama, Japan. The exhibition aimed at facilitating exchange of information about Japan-India business cooperation in Africa, and promoting Africa’s development, peace and security by strengthening relations in multilateral cooperation and partnership. The Africa Alliance Zone highlighted the business development taking place in Africa in collaboration with five countries including India and the African Development Bank, an international organization.

The 10th Asian Business Summit (ABS), organized along with Keidanren, Japan in Hanoi, Vietnam highlighted how the close collaboration between the region’s economies was facilitating sustainable and inclusive development. The importance of comprehensive cooperation across technology, infrastructure, human resources, agriculture, health care, environment and financing to sustain economic growth and prosperity, especially in a digital era facing abrupt technological changes, was also emphasized.

The Agri Tech Seminar on Japanese technologies for value-added agriculture and food processing was organized along with Ministry of Agriculture, Forestry and Fisheries, Japan in New Delhi. Pursuing the objective of making India a leading exporter of agricultural products, the seminar brought forth the need for improving agricultural productivity by utilizing production management technologies. Leading
Indian and Japanese companies from the agri and food processing sector, as well as policymakers and government officials, got exposure to latest Japanese agricultural and food processing technologies.

**Mongolia**
During a visit to New Delhi, H.E. Mr Khaltmaagiin Battulga, President of Mongolia and his accompanying 25 member business delegation interacted with Indian stakeholders during a joint business meeting. The meeting focused on creating a better understanding and exploring business opportunities in Mongolia in sectors such as oil and natural gas, pharmaceuticals, food processing, information and communication technology and logistics amongst others.

**South Korea**
The India Korea Business Partnership Forum, organized along with the Korean International Trade Association (KITA), focused on the new and immediate business opportunities for Korean and Indian companies in innovation, hi-tech, start-ups, tourism, culture and other strategic areas of collaborations. The Forum hosted some eminent industry leaders and policymakers such as Mr Amitabh Kant, CEO, NITI Aayog; Mr Joo Hyung-Chul, Advisor to the President of South Korea for Economic Affairs and Chairman of the Presidential Commission on New Southern Policy, Republic of Korea; Mr Shin Bong Kil, Ambassador of Republic of Korea to India; Mr Sanjay Chadha, Additional Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India and Mr Shreekant Somany, Chairman, CII MSME Council, and Chairman & MD, Somany Ceramics Ltd.

**South East Asia**

**Cambodia - Lao PDR - Myanmar - Vietnam (CLMV)**
The 1st India-CLMV Reverse Buyer Seller Meet, centered on the theme of Building Economic Integration Through Value Chains, aimed at identifying and forging cross-border business partnerships that would contribute to the growth of India-CLMV bilateral trade and investment flows, knowledge exchange, technology transfers and research collaborations. Discussions on cross-border collaborative opportunities in sectors such as agriculture and allied services, healthcare and pharmaceuticals, automobile components and equipment manufacturing, chemicals and petro-chemicals manufacturing and renewable energy development took place during the sessions. The meet also trained the region’s focus on two cross-cutting areas that are integral to bilateral business partnerships - digital and physical connectivity and skill development.

**Indonesia**
CII’s 11th international office was launched by Dr S Jaishankar, Minister of External Affairs, Government of India along with Mr Thomas Lembong, then Chairman of the Indonesian Investment Coordinating Board - BKPM in Jakarta, Indonesia. This office will be the point of contact for Indian industry to collaborate with counterparts and become part of Indonesia’s growth story, as also for Indonesian companies to connect with India. It is part of the Market Facilitation Service (MFS), a new initiative of CII under which offices will be set up in select emerging markets to facilitate access for Indian industry to both trade and investment.

**Philippines**
There exists significant potential for Philippines-India economic collaboration given the mutual complementarities that could be useful in deepening trade and investment ties. These include the Philippines’ ‘Build, Build, Build’ infrastructure initiative and India’s ‘Make in India’ mission, as well as next-generation infrastructure programmes. In this backdrop, Shri Ram Nath Kovind, President of India addressed the India-Philippines Business Conclave at the 4th edition of the ASEAN-India Business Summit in Manila. The
President of India was accompanied by a CII delegation focused on exploring new business opportunities; interacting with government officials, local industry and with investment promotion agencies to obtain insights into the cost and ease of doing business.

**Singapore**

A Core Group, led this year by Dr Naushad Forbes, Past President, CII and Co Chairman, Forbes Marshall Pvt Ltd, made its 26th annual visit to Singapore. Key political and business leadership in Singapore was appraised about the economic reform agenda in India and opportunities for business collaboration for the two countries to explore.

The members discussed recent and current economic policy reforms in India with Mr Heng Swee Keat, Deputy Prime Minister. They also met with the Minister of Finance and other senior ministers. They also updated the dignitaries of the improving business opportunities between both countries, especially in key areas such as investor outlook and industrial corridors. The ministers were assured that efforts to harness the opportunities in specific sectors, focus on start-ups, innovation, technology and fintech will be stepped up. Some other areas for possible co-operation included smart cities, R&D, technology and services.

In Singapore, opportunities were created to network with key stakeholders in collaboration with the Singapore Business Federation. During a visit to Singapore, Shri Buggana Rajendranath, Minister of Finance, Government of Andhra Pradesh, welcomed business leaders to explore investment opportunities in Amaravati and other cities. About 30 CEOs from Singapore discussed with Shri Hardeep Singh Puri, Minister of State for Housing and Urban Affairs, Civil Aviation and Commerce & Industry, Government of India areas of partnership in civil aviation, food & agro processing, skill development & education, technology & innovation and Industry 4.0.

**Middle East**

As part of the UAE’s 2030 Vision on Food Security, the country plans to develop a food park solely dedicated to India. This was emphasized by Ms Mariam bint Mohammed Saeed Hareb Al Mehairi, Minister of State for Food Security to the Indian industry. Promotion of high nutrient foods, organic and quinoa farming, reduction of food waste and sharing best practices between UAE and Indian farmers were highlighted during an interaction in New Delhi. Indian industry put forth their concerns about VAT, intellectual property, trademark, copyright laws and ‘price freeze’ on essential commodities and brands in UAE.

A business delegation from India engaged in a direct dialogue and B2B meetings at the Future Investment Initiative (FII) Forum in Riyadh. The meeting assumed significance, being a precursor to the visit of Shri Narendra Modi, Prime Minister of India to the Future Investment Initiative event in Saudi Arabia.

**West Asia and North Africa**

West Asia and North Africa (WANA) Region is a socially vibrant and economically promising region. In this context, a multi-sectoral business delegation visited Tunisia, with a view to gain exposure to sectors such as renewable energy, automobile, manufacturing, infrastructure and construction, farm equipment and
power transmission. The delegation also met Mr Zied Ladhari, Minister of Investment, Development and International Cooperation and Mr Habib Dababi, Secretary of State, Ministry of Industry and Small and Medium Enterprises, Tunisia.

The Regional conclave on India-West Asia North Africa in Cairo, Egypt was joined by over 250 delegates from 11 countries. It endeavoured to deepen economic and business ties and paved the way for new opportunities and a gamut of cross-border project partnerships. Shri Hardeep Singh Puri led the Indian delegation.

South Asia

Bangladesh

During her state visit to India, H.E. Sheikh Hasina, Prime Minister of Bangladesh, was accompanied by a 2 member ministerial delegation and a trade mission of 77 companies. The delegation discussed the emerging business and investment opportunities as well as issues relating to trade and investment between the two nations. During a meeting of select CEOs with the Prime Minister of Bangladesh, it was observed that India-Bangladesh economic cooperation had matured to include trade and investment, security, water, power, shipping, development cooperation, people to people exchanges and human development.

Maldives

A business delegation to Maldives, focusing on sectors such as water management, sanitation and waste management, met key ministers and officials of the Government of Maldives. The delegation reiterated India’s commitment to fostering economic engagement by further strengthening and tapping emerging business opportunities in Maldives. The focus was on identifying new projects where Indian industry could play an active role, facilitate discussions on possibilities for Indian participation in specific investible projects, engaging and providing a platform for long-term and sustainable dialogue between decision makers and business communities of both sides, catalyzing participation of Indian businesses in import requirements of Maldives. The delegation met the ministers of economic development, finance, health, foreign affairs and environment.

Central Asia

Iran

Coinciding with the International Conference on Development of Chabahar Port, a 30 member business delegation, led by Mr Gopal Krishna, the then Secretary Ministry of Shipping, Government of India, visited Chabahar, Iran. The objective was to explore the enhanced usage by Indian companies and advantages of Chabahar Port for extending business links with Iran, Afghanistan and the Central Asian region. Meetings with Iranian and Afghanistan counterparts, senior government officials and other relevant stakeholders from Central Asian Countries also provided useful insights on building this partnership.

Uzbekistan

At the 1st Meeting of the India-Uzbekistan Joint Business Council, a roadmap was developed for enhancing
economic cooperation and partnership between the businesses of the two nations. The council addressed issues pertaining to promotion of trade and investment, including market access, promotion of business alliances and possibilities for collaboration between Indian and Uzbek companies and development of synergies to explore business opportunities in third countries.

AUSTRALIA

India and Australia enjoy multiple synergies and a shared cultural and institutional arrangement, founded on democratic values. Membership of the Commonwealth further adds to this mutual understanding and friendship. Having upgraded the relationship to a strategic partnership in 2009, the two nations have built a strong two-way interaction through regular high-level visits.

The India Economic Strategy 2035 accepted and adopted by the Prime Minister of Australia in 2018 recognizes the rapid and extraordinary transformation that the Indian economy is undergoing. The Australian Government is now taking necessary measures to implement the recommendations to increase Australian investment from the current AUD 10 billion to AUD 100 billion by 2035. Efforts have been stepped up to ensure intensive engagement in 10 specific areas such as education, tourism, resources and agri-businesses in 10 states in India.

An Australia Economic Strategy has been drafted at the behest of the Department for Promotion of Industry and Internal Trade. A consultative approach was followed to develop this strategy, aimed at mirroring and best leveraging the Australia strategy. During a meeting held on the sidelines of the East Asia Summit in Singapore, Shri Narendra Modi, Prime Minister of India, apprised H.E. Mr Scott Morrison, Prime Minister of Australia, about this strategy document.

EUROPE

France

A leadership delegation comprising Mr Vikram Kirloskar, Dr Naushad Forbes, and Mr Chandrajit Banerjee, Director General, CII participated in the OECD Forum and Business at OECD (BIAC) General Assembly in Paris. They interacted with Ambassadors to the OECD of the 36 member countries on topics such as the Indian economy, reforms, trade and investment, technology and innovation. The leadership also addressed the BIAC General Assembly on India’s national priorities and challenges.

The current political and economic scenario in France and India as well as those for exploring new collaboration opportunities businesses and institutions of the two countries, found the focus of deliberations with counterpart organizations such as MEDEF, Business France and ICC. Mutual areas of cooperation were discussed with Ms Agnes Pannier-Runacher, Minister of State for Economy and Finance, Government of France.

Germany

H.E. Dr Angela Merkel, Chancellor of the Federal Republic of Germany, the Ministers of Foreign Affairs, Science and Education, Food and Agriculture, and an accompanying 13 member delegation were in India for a state visit. In an exclusive meeting, a select group of CEOs from both the sides discussed ways to enhance the bilateral economic relationship in some key sectors of mutual interest. 
Netherlands

Indian as well as Dutch CEOs and some leaders from the scientific community and the governments were present at the India-Netherlands Tech-Leadership Roundtable, organized with the Embassy of The Netherlands and Confederation of Netherlands Industry and Employers VNO-NCW, on the sidelines of the CII-DST India-Netherlands Technology Summit.

United Kingdom

The Annual CEOs’ Mission to the UK, led by Mr Vikram Kirloskar, President, CII and Chairman & MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor discussed the UK India economic agenda and held high-level conversations on India’s business and investment interests in the UK. The meetings with policymakers, industry bodies, parliamentarians, think tanks and prominent UK companies helped get a better understanding of UK’s current political and economic situation and the future direction for Indian businesses and investments. The visit was also an opportunity to share with the UK stakeholders, the Indian industry’s view and agenda for the next 5 years, post the general elections in India and a newly formed government.

East Europe

The 5th edition of the India-Europe 29 Business Forum was held in New Delhi, jointly with the Ministry of External Affairs, Government of India. The objective was to increase bilateral trade and investment with the E29 countries comprising 29 economies of Central and Eastern Europe, from Switzerland in the west to Turkey in the east and Norway in the north to Cyprus in the south.

Given their technological expertise in niche sectors and specialized products and services in diversified sectors, these countries can be strong partners for India, while also providing access to unexplored markets, including those in the EU. Moreover, both India and the Europe 29 countries hold strong prospects of becoming the beacons of growth in a slowing world. The opportunities for cooperation and growth lie in artificial intelligence, renewable energy and new-age manufacturing. This year, Mrs Mariyana Nikolova, Deputy Prime Minister of Economic and Demographic Policy, Bulgaria and Shri Piyush Goyal, Minister of Commerce & Industry and Railways also participated in the forum.

Finland

To promote design excellence in Indian industry as well as to expose design practitioners and design led firms to the global best practices, a 22 member delegation visited Finland. They interacted with top design firms, business agencies, city government and Aalto University. The delegation also visited the design museum to understand the design ecosystem in the country.

Spain

At the 11th edition of the Horasis India meeting, co-hosted with the City of Malaga and the Province of Malaga, over 300 Indian and global business leaders as well as government officials deliberated on India’s
growth, and the country’s place in the global political and economic landscape. While reviewing the drivers that contribute to the country’s present and future well-being, the meeting was also an opportunity for Indian and Spanish companies to explore business partnerships. A 10 member CEOs delegation shared their perspectives on various subjects such as inclusive growth, India’s politics, society and foreign relations, education, technology, entrepreneurship and smart cities.

Sweden
During a state visit to India, Their Majesties King Carl XVI Gustaf and Queen Silvia affirmed Sweden’s commitment to be a key partner in India’s rapid development and the efforts to tackle common challenges such as climate change/environment, infrastructure, research and health. An accompanying business delegation was aimed at strengthening bilateral ties and exploring business opportunities in both the countries.

Shri Piyush Goyal attended the 19th meeting of Indo – Swedish Joint Commission for Economic, Industrial and Scientific Cooperation held in Sweden. A CEOs delegation participating in the meeting interacted with key stakeholders from Sweden’s government and private sector.

During his visit to Switzerland, Iceland and Slovenia, the business delegation accompanying the President of India, Shr Ram Nath Kovind participated in customized B2B meetings. The delegation had representatives from sectors such as aerospace, oil & gas, mining, infrastructure, real estate, food & beverage, renewable energy, information technology, precision engineering, pharmaceuticals & healthcare, tourism & hospitality, financial services, railways, security, steel, chemicals and agriculture.

A business delegation accompanied Vice President of India, Shri M Venkaiah Naidu, during his visit to Lithuania, Latvia and Estonia. Companies representing sectors such as IT & ITeS, railways, real estate, education, food, pharmaceuticals, steel, engineering & infrastructure met the Vice President of India in all the countries. During the business sessions, the host countries shared an overview of their long-term strategy for economic growth as well as investment opportunities and attractiveness of doing business with their countries.

EURASIA
Belarus
Indian industry’s commitment to strengthen investment and trade with Belarus received an impetus with a slew of activities including the visit of a business delegation to Belarus. The delegation aimed at identifying prospective partners through participation in the Indian – Belarusian Innovation Forum. A MoU was also signed with the National Agency of Investment and Privatization.

Russia
The Eastern Economic Forum, organized in Mumbai, was aimed at strengthening ties between the international community and Russian business, federal, regional and local government bodies showcasing new investment and business opportunities. Mr Yury Trutnev, Deputy Prime Minister, Presidential Plenipotentiary Envoy to the Far Eastern Federal District, Russian Federation led the delegation.

A multi-sectoral delegation participated in the St Petersburg International Economic Forum (SPIEF). The annual India Russia Business Dialogue, organized on the sidelines of SPIEF, was addressed by the Ambassador of India to the Russian Federation, Mr D B Venkatesh Varma, and by Mr Vikram Kirloskar. The annual CII India reception, attended by around 400 delegates, showcased Indian culture, Indian branding and cuisine. A MoU was signed with the Russia Export Center to foster trade between India and Russia.
In 2019, CII North America expanded its subnational engagement to bolster the India-US economic relationship beyond both the capitals and Tier-1 cities. Delegations and events were actively promoted to take the US and India strategic partnership story to other states, creating new opportunities and building stronger relationships along the way. The strategy is designed to increase bilateral investment and job creation by facilitating exposure to new partnerships and opportunities.

The strategy execution will involve larger efforts to increase awareness about CII in the US, by expanding operations into new geographies and sectors, as well as engaging with organizations that focus on building state and city-level partnerships. The strategic partnership story was driven through several engagement platforms opening new opportunities in Madhya Pradesh, Tamil Nadu and Ludhiana. The SelectUSA Summit India Reception, featuring the US Ambassador to India, Mr Kenneth Juster, as well as officials from the US Department of Commerce, gave a further push to the engagement.

During an industry interaction held on the sidelines of Trade Winds 2019, US Secretary of Commerce, Mr Wilbur Ross highlighted the opportunities for increased cooperation in the India-US relationship, including MSMEs and outer space exploration. The creation of thousands of US jobs by Indian IT companies was recognized during the interaction that also reinvigorated the US pitch for a Free Trade Agreement with India.

Shri Piyush Goyal was co-hosted with US-India Business Council, for an industry interaction to promote US-India trade and investment ties in New York City. Coinciding with the visit of the Indian Prime Minister and the recent announcement of economic reforms and FDI liberalization regimes by the Government of India, Shri Goyal provided insights into the ongoing US-India trade negotiations and sought feedback on how to eliminate bottlenecks to investment. Though a trade deal is yet to be announced, the industry is hopeful of robust collaborative efforts between US and India in the future.

Meetings with international stakeholders were planned for the 2nd Indian delegation to the Toronto International Film Festival (TIFF), organized along with the Ministry of Information & Broadcasting. The objective was to promote the Indian film industry and the India-Canada co-production treaty.

Today, globalization and regionalization are two parallel trends, playing critical roles in development and evolution of the global economy. The integration process of LAC began after the second world war, and after half a century’s development, nearly 20 inter-governmental regional cooperation organizations now exist among 33 countries, which serve a combination of both political and economic purposes.

India’s profile was promoted in the region in partnership with Latin American Integration Association (ALADI), the first integration block of the region. The geographical area of this block is inhabited by 560 million people with intra-regional trade exceeding USD 127 billion. The regional market provides a collective destination for a diverse range of Indian products and investments. Its member countries include all MERCOSUR and Pacific Alliance nations that India currently has, or is negotiating, a partial or free trade agreement with.

The 2nd India-Argentina Business Forum was held in Buenos Aires, Argentina in partnership with the Ministry of Foreign Affairs of Argentina. The objective was to strengthen existing businesses, and to develop new business opportunities, investment projects and strategic partnership between the two nations.

To deepen the relationships with regional economic integration institutions in Latin America and Caribbean, the India-Latin America Business Summit was organized in Uruguay in partnership with the Ministry of Commerce & Industry, Government of India, and the ALADI. Interactions focused on how India’s presence in the region can be strategized and vice versa. Important policy measures, creation of institutional frameworks to enable a dynamic trade and business environment, tackling non-tariff barriers such as connectivity, lack of awareness, lack of regular political and diplomatic engagements, and visa related challenges, were some of the other critical issues discussed.
BRICS BUSINESS FORUM

The BRICS countries, Brazil, the Russian Federation, India, China and South Africa, convened for the 11th edition of the Annual BRICS summit in Brasília, Brazil. The 2019 Brazilian Presidency was focused on the theme, BRICS: Economic Growth for an Innovative Future. Discussions focused on political and socioeconomic coordination, and areas where member countries have identified business opportunities, economic complementarities and areas of cooperation.

The new areas of BRICS cooperation, spearheaded by Brazil, include strengthening of cooperation on science, technology and innovation; enhancement of cooperation on digital economy; invigoration of cooperation on the fight against transnational crime and encouragement to the rapprochement between the New Development Bank (NDB) and the BRICS Business Council.

CII PRESENCE IN DAVOS

The World Economic Forum’s (WEF) annual meeting for 2020, held in Davos, marked its 50th year. WEF 2020, was convened under the theme Stakeholders for a Cohesive and Sustainable World. The meeting saw participation of a 130-member strong Indian delegation comprising of senior bureaucrats and state officials representing Government of India, CEOs of major Indian companies, media and civil society representatives. As the lead coordinator for the Indian participation at this meeting, CII organized several events including the traditional annual India reception and the Bollywood Music Nite.

Discussions revolved around the themes Towards USD 5 trillion Indian Economy: Challenges & Opportunities in partnership with Ernst & Young and Embracing Industry 4.0: An India Narrative, in partnership with Deloitte. While investment opportunities in Madhya Pradesh, Karnataka and Telangana were showcased, participants deliberated on attracting global institutional investments to India and shifting the global value chains by leading the way for new investments in India.

CII EMERGING MARKETS FORUM

The Emerging Markets Forum (EMF) launched in 2018, offers targeted trade and investment facilitation services to Indian companies looking to expand operations in emerging markets, with the initial focus on ASEAN, Central Asia and Africa. The forum also acts as a platform to address issues faced by the Indian industry in emerging markets. The constant efforts to align the activities to the changing global trade and investment dynamics, the forum offers market facilitation services (MFS) to Indian companies desirous of expanding their global footprint. The export advisory reports include analysis for identification of the best markets for exports and suggest market entry strategy for Indian exports in emerging markets. For investments, these reports provide an in-depth sectoral and market analyses, information on company incorporation processes, policy landscape overview and partner searches. During the year, the forum witnessed several activities, including the release of EMF Country Trade and Investment report for Myanmar as well as factsheets on transport, steel and engineering sectors in that country.
During 2019-20, CII continued to actively engage with industry, governments – both Indian and international – as well as multilateral organizations, building a dynamic policy advocacy dialogue representative of industry interests, balanced with real-time trade policy research.

Inputs were given on a diverse set of issues covering the entire spectrum of international trade concerns, such as Free Trade Agreements (FTAs), India’s Foreign Trade Policy, World Trade Organization (WTO), non-tariff barriers to trade and digital trade. Feedback was also given to the Business 20 (B20), the business arm of the G20, where CII represents India.

Besides advocacy, flagship research on Global Trade Architecture, FTAs, and WTO reforms was also initiated during the year.

**ADVOCACY**

Stakeholder consultations on the entire range of India’s engagements with respect to FTA encompassed Regional Comprehensive Economic Partnership (RCEP), India-Peru, the Asia-Pacific Trade Agreement (APTA), and the review of the India – Korea CEPA, India-Japan CEPA, India-Chile FTA. While actively following the India-US bilateral relationship and the potential India-EU BTIA, CII provided key inputs based on research on services trade, digital trade and investment-related issues.

Maintaining an active bilateral engagement with the WTO, CII developed and shared with the government an understanding of key issues that need to be taken a stand on. Some of these include issues related to the appellate body, investment facilitation, and customs duties on electronic transmissions.
The partnership with EU’s delegation to India, as well as ‘amfori’ – an EU-wide trade body, and CII’s MoU partner continued to spread knowledge about the EU’s functioning, and issues of mutual interest including trade and sustainability as well as supply chain management.

The government of India set up a High-Level Advisory Group (HLAG), in times of global trade uncertainty and refashioned trade flows, triggered by trade rifts between two leading global economies. In-depth discussions with HLAG focused on implications of the trade war and possible opportunities for India, as well as the issues of WTO reform and FTAs.

The recommendations on the review of the Foreign Trade Policy (FTP) highlighted India’s position with respect to the changing nature of global trade. The need for the new FTP to consider the new and growing challenges facing exports and to design appropriate policy interventions to help exporters overcome these challenges was particularly stressed. India’s basket of exports has not changed much over the last decade for both, merchandise as well as services exports. The need to diversify the export markets and products was highlighted too. The recommendation that India’s export related incentives be made WTO complaint was accepted, with the government announcing a new scheme titled Remission of Duties or Taxes on Export Products (RoDTEP).

**ACTION**

The 9th Asia-Pacific Trade Facilitation Forum (APTFF) was organized in New Delhi in partnership with United Nations ESCAP; Asian Development Bank, and the Ministry of Commerce and Industry, Government of India. The Forum, an UNESCAP-ADB joint programme, with 250 participants from over 30 countries around Asia and beyond, was held in India for the first time.
While many of the fastest growing economies have benefitted from a high exports trajectory, currently, global trade is going through a challenging phase triggered by an assortment of factors. Apart from rising protectionism, other key factors affecting global economic growth include the EU slowdown, lack of progress of multilateralism and the Doha Development Round.

India’s exports, while being impacted by these global trends, face several other challenges that have stymied its long-term potential. Some of these include lack of export financing, poor logistics and infrastructure constraints, other taxes and cess. In this backdrop, India’s merchandise exports grew at a compounded annual growth rate (CAGR) of 11.96% between 2003 and 2018 and was marked by much fluctuation. The provisional trade statistics indicate a deceleration in exports with a contraction of 1.9% between April and January 2019 vis-à-vis the same period in 2018. To assuage the impact of these measures on India’s exports trajectory, the following measures were recommended for incorporation into India’s export strategy (including the Foreign Trade Policy):

- Diversifying exports markets and products to increase overall trade and cushion the impact of slowdown in different markets. To this extent the FTP can stress on the need for diversifying India’s export markets and create programmes such as the Market Access Initiative (MAI) to help Indian exporters identify new markets
- State-level export promotion and trade facilitation through enhanced interaction with state governments, to build an understanding of their comparative advantages in the production of certain goods and services. Every state government must be mandated to define its own ‘Export Strategy’ document and offered support of the Union Ministries as well as NITI Aayog to achieve this
- For developing export-oriented manufacturing and targeted foreign direct investment, encourage MNCs to consider India as a manufacturing hub for global markets.
(FDI) norms could be differentiated to incentivise investments in generating exportable goods and services

- The cost of credit in India, which is a minimum of 6 to 7%, needs to be aligned to that of major competing countries where it is often negligible. The government’s interest equalization scheme from 3 to 5% offered to MSME exporters should be made applicable to all exporters to make them globally competitive
- Embassies and High Commissions could be mandated to proactively gather and share market intelligence on new opportunities, and the incentives being offered by other governments to their exporters
- There is a pressing need for a National Shipping Regulatory Body, on the lines of IRDA (Insurance Regulatory and Development Authority) and TRAI (Telecom Regulatory Authority of India), to determine freight rates
- A one-time 100% income tax exemption for a period of 5 years be provided for all units operating in Special Economic Zones to mitigate the financial burden and give impetus to exporters to make further investments to expand or strengthen their existing operations
- The DGFT could establish a Market Access Facilitation Cell, as a one point center, to help Indian exporters gain requisite information for diversifying exports and exploring markets in Africa, Latin America, South-East, and East Asia
- Helping industry navigate FTAs is as crucial as being part of FTAs/RTAs for continued growth of Indian exports. The new FTP could focus on best practices from other countries to create a provision on how to increase FTA utilization
- Standards must be made a core component of India’s exports strategy rather than considering them as an import control measure. India already has a national standards policy and a strategy for their promotion. The new approach must be developed in tandem with the development of a market facilitation cell, helping industry navigate FTAs, leveraging RTAs and increasing FTA utilization
- Given the greater role of services in the global economy, to encourage growth India needs to diversify its services portfolio. The champion services sector plan of the government is an important step in this regard. The new FTP must actively work towards promoting new services exports from India and creating a framework that addresses issues affecting these.

Apart from these recommendations, the report on India’s Exports - Trends, Challenges, and Future Strategy highlights how exports remain important for sustained economic growth of an economy and their role in India becoming a USD 5 trillion economy. It also emphasized the need for an export strategy that considers the changing structure of international trade and enables leveraging opportunities and mitigate challenges. The report surveyed the international trade scenario, India’s exports story, the challenges faced by Indian exporters, and made recommendations for India’s exports strategy.

The report on India’s Exports to Emerging Economies: Targeting Prospects and Chasing Opportunity identifies 18 emerging economies where India has the opportunity to expand exports. Identified based on the current GDP growth, as well as their population size, an indicator of growth prospects in the foreseeable future, the report also draws up a comprehensive matrix of emerging countries and potential exports from India to these countries.

**ACTION**

Exports are key component of India’s growth performance. The steps taken by the Government of India recently towards access to credit, trade facilitation, FTAs, standards & certification, setting-up of inter-ministerial groups to monitor export finance and a special FTA utilization mission amongst others, would help in creating a robust ecosystem for exports to grow going forward. In this backdrop the Exports Summit, 2019 themed Driving Exports: Driving Growth focused on export financing; improving trade facilitation for boosting exports; sectoral export strategies and standards & certification. While inaugurating the summit, Shri Piyush Goyal, Minister of Commerce & Industry and Railways, Government of India, highlighted the importance for government and industry to work together to make industry more globally competitive. He shared details of the government’s NIRVIK scheme, also known as Export Credit Insurance Scheme (ECIS), that addresses the export financing challenges.
TRADE FAIRS

Launched in 1975, CII’s Trade Fairs continue to serve the Indian industry, government and other stakeholders as a business development tool. Over more than four decades, these have become a key reference point for both domestic and international business communities, that also trigger economic development of the nation.

Trade Fairs have been and would continue to provide tremendous opportunities to build global linkages with the industry by way of showcasing India’s prowess, end to end offerings and solutions across the value chain. During the year, CII organized a number of exhibitions, fairs and expositions that created business opportunities for Indian and international businesses.

International Railway Equipment Exhibition (IREE 2019)

The 13th edition of IREE 2019, organized in association with Indian Railways in New Delhi, India, was Asia’s premier global event for the rail transportation sector. Overcoming formidable challenges of hosting the IREE at a greenfield location, the event was a success in terms of quality of space, range and attention of exhibitors, footfall, new features, business-to-business facilitation, and a two-day international conference that set new benchmarks for the depth and range of presentations and attendance. With the special focus on rail furnishing, infrastructure and light rail, the stall layout and innovative product displays were much appreciated.

Attended by dignitaries including Mr Joe Ghartey, Minister of Railway Development, Ghana, and Railway Board Chairman, Mr V K Yadav, the event saw Minister of State for Railways, Suresh C Angadi, release the CII-EY Study titled Railway-The Driver for India’s Growth Story. Besides the ministerial and business delegation from Ghana, overseas delegations from Bangladesh, Myanmar, Switzerland, Japan, Spain and many other countries attended IREE 2019. The largest ever pavilion of the Indian Railways, with theme-based stalls for rail coaches, locomotives, and electricals, showcased its strengths, capabilities and future requirements. While the exhibition also had participation of the zonal railways and PSUs, over 500 senior officials from Indian Railways attended the conference. The Rail Museum displayed the history and heritage of Indian Railways.

From L to R: Anand Chidambaram, Chairman, CII Rail Transportation & Equipment Division and MD, Progress Rail, A Caterpillar Company; Joe Ghartey, Minister of Railway Development, Ghana; V K Yadav, Chairman, Railway Board; Michael A N N Oquaye, High Commissioner of Ghana to India; Chandrajit Banerjee, Director General, CII and Rajesh Agrawal, Member (Rolling Stock), Railway Board, at IREE 2019 in New Delhi.
With a total of 496 exhibitors, including 126 international exhibitors and 45 first timers, the show hosted 16,800 visitors, including 1,450 from overseas and facilitated 2,150 B2B meetings. About 40 speakers addressed the 640 delegates through 10 session during the conference.

**Global Bio India 2019**

Global Bio India, the largest global platform created for Indian Biotechnology sector by Department of Biotechnology (DBT), Ministry of Science & Technology, Government of India was organized in partnership with Biotechnology Industry Research Assistance Council (BIRAC) and Association of Biotechnology Led Enterprises (ABLE) and Invest India. A multi-stakeholder platform, it presented the strengths of the biotechnology sector while showcasing India as a preferred destination for manufacturing, developing and innovation. Investor meetings, exhibitions, webinars, hackathons and B2B meetings were a few salient components of the event.

Global Bio India, 2019 attracted over 2,500 delegates, 200 plus exhibitors from 16 countries, 250 start-ups, government and regulatory bodies. It showcased key biotechnology innovations, products, services, technologies to identify investment and collaboration opportunities for R&D and explored licensing options for existing products, attracting major contract projects from international companies as well as major global venture funding into India.

The 2019 edition was also a platform to deliberate upon the opportunities and key challenges in biomanufacturing, capacity-building, creating global supply chains, investments, new technologies, IP led innovations and industry-academia collaborations to draw up a growth oriented roadmap for India’s biotechnology sector.

**Global Exhibition on Services (GES 2019)**

The 5th edition of Global Exhibition on Services (GES), led by the Department of Commerce, Ministry of Commerce and Industry, Government of India was organized in association with Services Export Promotion Council (SEPC) in Bengaluru. With a view to building the global brand of Indian services sector, sector specific sessions were held for 12 champion services sectors. With participation from 55 countries, GES 2019 focused on promoting trade and investment in services across the world.

Shri Piyush Goyal, Minister of Commerce & Industry and Railways, Government of India was joined by several...
senior government officials and industry leaders as well as Mr Rajesh Kumar Modi, Deputy Minister of Industry and Commerce, Zimbabwe at the GES.

Excon 2019

The 10th edition of Excon, an international exhibition & conference on construction equipment & construction technology was held in Bengaluru. Supported by the Ministry of Road Transport and Highways, Government of India, National Highway Authority of India (NHAI), Government of India and Builders Association of India (BAI), the exhibition was co-hosted by the Government of Karnataka and the Indian Construction Equipment Manufacturers’ Association (ICEMA) as a sector partner.

Shri Nitin Gadkari, Minister of Road Transport & Highways and MSME, was joined by Shri B S Yedurappa, Chief Minister of Karnataka, Government of India as well as senior ministers and officials of the state government and the CII leadership at the inaugural session.

Women in infrastructure were celebrated through the Women Building India-Equal Opportunity Awards. While recognizing companies that have taken proactive steps to enable women to participate in the infrastructure sector, CII also released a report titled Women in Infrastructure. A MoU was signed with the Education Department (Higher) of Government of Karnataka to build industry institute connect by setting up a taskforce to facilitate skilling and training workforce for the construction equipment sector.

With over 1,200 exhibitors (including 390 international exhibitors), 6 country pavilions, participation from over 20 countries, the exhibition that was spread across 3,00,000 square meters attracted 60,000 visitors.

Auto Expo 2020

The 15th edition of the Auto Expo, now in its 34th year, highlighted India’s largest manufacturing sector, i.e. the auto components sector. Like its last edition, this year too, the Auto Show was held at two locations - the Auto Expo Motor Show at Greater Noida and the Auto Expo Components show at New Delhi. More than 1,200 companies from 20 countries including Canada, China, Germany, Japan, South Korea, Turkey and UK amongst others, participated in the Auto Components Show spread across 60,000 sq mtrs. The Components Show was attended by over 1,15,000 visitors, while the Motor Show witnessed 352 product displays from 108 exhibitors and over 6,00,000 visitors. The show hosted eight global premieres, and over 70 launches and unveils.
Enterprise India

Enterprise India, Kenya was organized in association with the High Commission of India, Nairobi, Kenya with the support of the Ministry of Commerce & Industry in Kenya. Inaugurated by Mr Rahul Chhabra, High Commissioner of India to Kenya; Mr Hezekiah Bunde Okeyo, Industrialization Secretary, State Department for Industrialization, Ministry of Industry, Trade & Cooperatives, Republic of Kenya; Dr Moses Ikiara, Managing Director, Kenya Investment Authority and Mr Bharat Shah, Board Director, Kenya Association of Manufacturers (KAM), the exhibition witnessed participation of over 90 Indian companies. The companies showcased India’s strengths in engineering, automotive, agriculture, construction, building material, power, manufacturing, rubber & plastics, packaging, chemicals, sports, pharmaceuticals, machine tools, hand tools, food & beverage, banking & financial services amongst others. With over 1,400 business visitors, the event generated more than 350 leads through the business meetings.

A similar event was organized in Nepal in association with Embassy of India, Nepal with support of the Ministry of Commerce & Industry in Kathmandu, Nepal. Inaugurated by Mr Manjeev Singh Puri, Ambassador of India to Nepal and Dr Ajay Kumar, DCM, Embassy of India – Nepal, the exhibition witnessed 51 Indian companies. The objective was to promote Brand India, enhance bilateral trade and investment by creating awareness on business opportunities available on both sides. The show also facilitated joint ventures, technology transfers,
marketing arrangements as well as people-to-people contact between the two countries. State Bank of India in Nepal hosted a session for Indian exhibitors on how to do business in Nepal.

**India Pavilions in Overseas Shows**

Efforts at building brand India in the overseas markets, in partnership with Ministry of Commerce & Industry, continued through the year. The focus was on strengthening bilateral trade and creating awareness about business opportunities available on both sides. Sector specific shows and India pavilions were organized at the following exhibitions across the world:

- KYIV Build at Ukraine 2019, Ukraine
- 5th edition of Bangladesh Buildcon 2019, Bangladesh
- Big 5 Qatar 2019, Qatar
- MSV 2019, Czech Republic
- Phil Construct 2019, Philippines
- ADIPEC 2019, Abu Dhabi, UAE

**Organic Food Festival for Women Entrepreneurs**

The National Organic Food Festival for Women Entrepreneurs, organized along with the Ministry of Food Processing Industries and Ministry of Women and Child Development, was aimed at empowering women and promoting organic produce. The festival’s special focus was on showcasing the expertise of women entrepreneurs and exploring business opportunities along with creation of employment under one roof. The festival and exhibition was inaugurated by Smt. Harsimrat Kaur Badal, Minister of Food Processing Industries and Smt. Smriti Irani, Minister of Women & Child Development and Textiles.

More than 180 women entrepreneurs and Self Help Groups (SHG’s) from 25 states exhibited organic products such as fruit & vegetables, ready to eat foods, spices and condiments, honey, cereals, dry fruits. The event pre-arranged B2B and B2G meetings, organic food quizzes, live culinary sessions, chef speaks, cultural events, nukkad natak amongst others.
Agriculture, Food Processing, Allied Sectors and Nutrition

Manufacturing

Infrastructure

Defence and Aerospace

Power and New & Renewable Energy

Fast Moving Consumer Goods

Services

Health and Life Sciences
For the year 2019-20, the CII National Council on Agriculture focused on making agri production and marketing systems efficient and on reducing farmer distress.

**ADVOCACY**

**Promoting Aggregation**
Policy submissions for improving financial access for Farmer Producer Organizations included simplifying the loan application processes, exploring funding through alternative existing sources as well as existing schemes, allowing private sector equity investment in FPOs and revamping existing schemes for financial assistance under SFAC, amongst others.

**Improving Market Access**
The recommendation on fast-tracking adoption of Model Agricultural Land Leasing Act 2018 by state governments to enable aggregations of fragmented land ownership and to facilitate aggregator investments while ensuring ownership rights of small land owners, was re-emphasized during the year.

It was proposed that agri-related central funds be made available only to the states that ensure adoption and formulate rules for Agricultural Produce and Livestock Marketing (Promotion and Facilitation) [APLM] Act 2017. Detailed recommendations were made for upgradation of infrastructure to encourage horticulture trading through e-NAM, and to facilitate procurement by retailers and processors. Use of technologies such as Artificial Intelligence (AI), mapping of e-NAM linked mandis based on production clusters, and necessary produce-related infrastructure were also emphasized.

While pushing for phasing out the Essential Commodities Act, creation of a central information portal for stock declaration was advocated by market participants. The government was also urged to create a framework for dealing with seasonal price variations and identifying genuine agri supply chain players.

**Leveraging Technology**
The government has prioritized digitization of land records and is working with the Ministry of Electronics...
and Information Technology to develop a digital data bank of the country’s farmers. These have been long standing CII requests and they will accelerate the adoption of advanced technology solutions for efficient production planning; pre-emptive risk assessment and mitigation amongst others.

**Fostering Innovation**
Implementation of Intellectual Rights Policy 2016, Regulatory Data Protection (RDP) and 5 years’ exclusivity for a newly registered product were advocated to create a robust Intellectual Property Rights (IPR) regime for agriculture technology in the country.

**Investment in Agri infrastructure**
Agri specific infrastructure has the potential to drive the agriculture sector towards a modern, commercial and dynamic farming system. A national infrastructure pipeline was proposed to focus on this aspect through the establishment of an Independent Quality Control Management Authority; augmenting the risk mitigation infrastructure; automating the logistics ecosystem and creating seamless integration. A detailed assessment of the existing infrastructure and its utilization, gap identification that impacts capacity utilization and investing to bridge the gap to build efficiency in the supply chain were also suggested.

**Enhancing Agri Export Competitiveness**
A cluster-based approach with focused investments in post-harvest handling infrastructure development at sea ports, railways and airports, considered critical towards doubling agricultural exports by 2022, was proposed to the government. Towards improving domestic and export markets for perishables, investment in efficient cargo perishable centers at airports was also requested for.

Detailed articulation of reasons for price control, discussions with industry before decision making and evaluation of suitably replacing criminal punishments with civil punishments, where possible were proposed to the government. Several recommendations were submitted to Shri Parshottam Rupala, Minister of State for Agriculture & Farmers Welfare and the then Minister of State for Panchayati Raj. CII worked on institutionalizing sub-sectoral industry meetings with relevant joint secretaries based on discussions with Mr Sanjay Agarwal, Secretary, Ministry of Agriculture & Farmers Welfare.

A Task Force on Sugar and Ethanol was constituted to work in partnership with the government to take forward the reform agenda for sugar, ethanol and cogeneration. Issues related to pricing, phased payment for reducing cane arrears, export policy, pricing for ethanol derived from b-heavy molasses and sugar cane juice and promoting cogeneration amongst others, were discussed with the government. A long term pricing policy for ethanol and increasing the price of ethanol derived from b-heavy molasses and sugar cane juice to help improve ethanol availability were also suggested to the government.

A detailed submission, made to NITI Aayog for the growth of the sugar, ethanol and co-generation sector, included suggestions on a revenue sharing formula, stabilization fund and three staged cane price payment. Also, long term pricing formula for ethanol along with E-13 implementation for 2019-20 and E-20 implementation by 2025 was proposed.
FOOD PROCESSING

CII National Committee on Food Processing focused on three growth enablers - employment generation, rural urban connect and environment sustainability, with an overarching agenda to double farmers income by 2022.

ADVOCACY

Policy recommendations aimed at the growth of food processing sector were submitted to Minister of Food Processing Industries (MoFPI), Smt Harsimrat Kaur Badal. The representation on rationalization of GST rates for the industry at 5% for perishable food items and 12% for non-perishable food items was made to the MoFPI, Ministry of Finance (MoF) and the GST council.

In a pre-budget meeting with the MoF, detailed discussions were undertaken on income tax amendments for fostering investments, realization of the Brand India vision, enhancement of exports, employment and facilitating ease of doing business for the food processing industry.

CII Task Force on Food Regulatory Affairs continued to engage with FSSAI towards building a robust regulatory framework, including several horizontal regulations - advertising and claims regulation; labelling and display; fortification of food and safe food & healthy diets for school children, amongst others. Capacity building workshops for product reformulations for MSMEs are under preparation.

To take forward the plastic waste management agenda, inputs were given on the FSSAI report of the Expert Committee which was submitted to the National Green Tribunal (NGT).

ACTION

At the FSSAI Eat Right India for Sustainable Living campaign, members pledged to achieve a plastic waste-free food and beverage sector in the presence of Dr Harsh Vardhan, Minister of Health & Family Welfare, Science & Technology and Earth Sciences.

Given that a culture of excellence and smart interventions is key to India becoming a global food factory, the 14th edition of the Food Safety, Quality & Regulatory summit was themed Smart Interventions for Strengthening the Food Safety Ecosystem. A training package on smart use of antibiotics in the poultry value chain aimed at building capacity towards increasing awareness of anti-microbial resistance (AMR) was released during the summit. It is also expected to encourage best practices amongst producers, processors, farmers and other relevant stakeholders. A diagnostic tool box for mid-day meals was developed, based on the findings from field assessment of 88 mid-day meal kitchens. The tool aims to diagnose food safety concerns in these kitchens. The first ever Food Safety Kaizen Competition Seminar for Food Manufacturing, Services and Laboratories was also launched on the sidelines of the summit.

ALLIED SECTOR

CII National Committee on Allied Sectors in Agriculture continued to work towards doubling farmers’ incomes.

ADVOCACY

Detailed recommendations were submitted to Shri Giriraj Singh, Minister of Animal Husbandry, Dairying and Fisheries. In addition, a representation was submitted to Shri Piyush Goyal, Minister of Commerce & Industry and Railways on issues impacting India’s seafood export.

A detailed presentation on Matsya Sampda Yojana and discussions on increasing both public and private investments in the sector were also undertaken during the year. Work in the area of animal feed was taken

Arabind Das, Chairman, CII National Committee on Allied Sectors in Agriculture - Dairy, Fisheries and Poultry and the then CEO, Godrej Tyson Foods Ltd along with Atul Mehra, Co-Chairman, CII National Committee on Allied Sectors in Agriculture and Chairman & Whole Time Director, Tasty Dairy Specialities Ltd calling on Giriraj Singh, Minister of Animal Husbandry, Dairying and Fisheries in New Delhi
forward as part of the FSSAI’s Animal Feed Regulation Working Group Committees for the year 2019-20.

**ACTION**

The national conference, organized in partnership with Department of Fisheries, Ministry of Fisheries, Animal Husbandry and Dairying, deliberated on key interventions required to strengthen and sustain fisheries and aquaculture industry and define a roadmap for implementable actions. The conference was themed Harnessing the Untapped Potential of Fisheries & Aquaculture.

**NUTRITION**

During 2019-20 the National Committee on Nutrition worked with NITI Aayog and various ministries such as Woman and Child Development, Food Processing and Consumer Affairs on aligning its actions with the National Nutrition Strategy and contributing to tackling the malnutrition challenge.

CII is an active part of IMPAct4Nutrition (I4N) and contributed to the discussions on nutrition in three strategic areas - assets and core business for nutrition; CASH/CSR for nutrition and employee engagement for nutrition.

Taking advocacy on nutrition forward with an aim to deliberate, forge partnerships and help evolve a future roadmap, the National Nutrition conclave was organized in New Delhi. A key takeaway from the conclave was making nutrition a multi sectoral priority by including water, food processing, health and many other departments in the dialogue.

A key online enabler, the digital platform on nutrition initiatives ‘Accelerating Nutrition Delivery (AND) was also developed. The compendium aims to capture both nutrition specific and nutrition sensitive programmes of various organizations.
Given the importance of the manufacturing industry for the country’s economic growth, development and job creation, India has set itself the target of becoming a USD 1 trillion manufacturing economy by 2025. Keeping the target in mind, the CII Manufacturing Council works on policy issues that impact India’s manufacturing industry. Efforts are directed at helping build an environment wherein various sectors can enhance their contribution towards achieving USD 1 trillion mark. Further, to bring consistency in policies that could enhance sustainable development implementation, the council also undertakes horizontal policy issues such as CoDB, EoDB, trade policy, exports, technology and skills that impact growth of the manufacturing industry.

In this direction, possible short and medium-term interventions for boosting growth in 9 focus sectors (capital goods, pharmaceuticals, metals, mining, electronics, textiles & apparel, automotive, food processing and chemicals) were shared with NITI Aayog and Department For Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce & Industry. In an interactive session with Shri Piyush Goyal, Minister of Commerce & Industry and Railways, strategies were discussed for promoting India’s high technology exports. The short-term policy agenda for eight focus sectors included specific, easily implementable recommendations that do not require a long-drawn process and are more administrative in nature. The low hanging fruit, identified at the behest of Shri Piyush Goyal, included products where India has strengths and advantages and can be promoted/protected with government intervention.

The DPIIT-CII National Consultation Forum focused on how manufacturing in the 14 champion sectors, identified for Make in India 2.0, can be incentivized. Issues impacting manufacturing growth in these sectors, key imperatives to boost global competitiveness and recommendations to facilitate growth were highlighted in sector specific sessions. In a report-back policy session, the sectoral roadmaps towards Make in India 2.0 were reviewed by the Minister of Commerce & Industry and Railways. The recommendations were based on six themes of investments, cost of doing business, ease of doing business, trade policy, technology and R&D, job creation and skills.

Two eminent industry leaders shared their success stories of homegrown manufacturing MNCs, during the Leadership Talk Series. The stories of global growth of Reliance Industries and Mahindra & Mahindra provided insights on how globalization is helping companies compete in domestic market and cope with the challenges that ‘Brand India’ poses.

Making domestic manufacturing competitive by developing domestic value chains as well as differentiated value-added products is critical for India. The council thus aimed at identifying specific issues, challenges, gaps and interventions required to augment the value chains in Indian manufacturing.
CAPITAL GOODS

The capital goods sector is expected to play a key role in driving India’s economic growth and for the manufacturing sector to achieve the ambitious target of USD 1 trillion by 2025 as it has immense potential to make a multiplier effect on the economy. The pre-requisites for harnessing this potential include enhanced presence of the capital goods sector in both the domestic and international markets; focus on technology development, innovation and R&D; policy initiatives and enabling schemes and industry-academia-government collaboration.

While the capital goods sector offers immense potential, currently a large part of the demand is being met through imports. The challenges facing the sector are a mix of lack of R&D mindset, cost of funding and brand image.

CII is working to identify 10 countries where the image of India’s capital goods sector can be strengthened. Industry’s acceptance of Indian designs and technology will lay the foundation for a thriving capital goods sector. Currently, Indian R&D organizations, such as Central Manufacturing Technology Institute (CMTI) are unable to find a market for indigenous technologies developed by them; there are limited users for their world class infrastructure such as test labs.

Efforts were made to scale up the government’s Centres of Excellence model set up in CMTI, IIT Madras and the Machine Tools Park, Bengaluru. These centres have given a thrust to industry academia collaboration.

Work was undertaken along with Department of Heavy Industry (DHI) to make recommendations on the draft Omnibus Technical Regulations (OTRs) for machinery safety to be applicable for all types of machinery and their safety components covered under chapter 84, 85 and other chapters. Opportunities for capital goods sector and role of technology in enhancing competitiveness of the sector were explored at the 4th edition of CII-DHI Capital Goods summit.

CHEMICALS

In the context of a growing economy, sustainable development is a prerequisite. Chemicals being indispensable, India needs to take a big leap forward, from the current share of 3% of the global industry to at least 5-6%. The zero defect, zero effect model, signifying products with no defect and production process with no adverse effect, is the future of chemistry. The CII National Committee on Chemicals focused on three critical areas to promote the growth of the chemical sector i.e. trade policy, PCPIRs and environment.

The 2nd edition of the Indian Chemicals and Petrochemicals Conference discussed economic trends
with a view to the future, building a responsible industry with respect to environment and safety and the need for adoption of chemical technologies to promote sustainable chemistry.

Shri D V Sadananda Gowda, Minister of Chemicals & Fertilizers and Mr P Raghavendra Rao, Secretary, Chemicals and Petrochemicals were part of the conference.

The key policy recommendations included timely grant of environment clearance certificates and environment impact assessments; validity period differentiation based on risk assessment and fast-track approval of Responsible Care certified units. Based on a discussion on safeguarding India’s interest, while negotiating RCEP and other FTAs, it was agreed that government would identify such products. The government was urged to make available to the industry common utilities, such as water, electricity and CETPS, at PCPIR, Dahej.

Working towards building a safe chemical sector in India, standards for safe transportation of hazardous chemicals are being outlined along with members.

**ICTE MANUFACTURING AND OFFICE AUTOMATION & IMAGING**

Integration of information, communication technology and electronics across sectors and in various stages of economic activities has made the role of the ICTE sector a critical building block of the economy. The sector’s contribution in making the domestic manufacturing market competitive is of strategic importance to India. In fact, the National Policy on Electronics 2019 (NPE 2019) envisages promoting domestic manufacturing and export across the ESDM value-chain to achieve a turnover of USD 400 billion by 2025.

The CII National Committee on ICTE Manufacturing, in pushing this objective, highlighted several industry issues and submitted recommendations to MeitY, NITI Aayog and DPIIT. The areas of focus included compensation of disabilities, development of components base, building a competitive ecosystem/infrastructure, stimulating demand, ramping-up exports and identifying the low hanging fruit. The need for drafting Indian Standards and encouraging R&D, design and innovation was also emphasized.

Following a unique format, the challenges and recommendations were presented to the Secretary MeitY at the 2nd edition of the Electronics India Summit. The recommendations focused on the three key themes affecting the industry i.e. merging technologies and design capabilities shaping the future, developing ICTE component ecosystem, and enhancing competitiveness to manufacture for the world. The summit witnessed wide participation and rich deliberations by senior industry representatives and CXOs.

**MINING**

Given the immense potential of the mining sector, it requires nurturing and efforts to make it sustainable. The CII National Committee on Mining worked towards developing a responsible mining sector, enhancing its competitiveness and addressing the uncertainty on leases expiring in 2020.
A study titled Towards a Globally Competitive Minerals and Mining Industry, aimed at identifying the potential and challenges affecting the Indian mining sector was released during the year. The study also documents international best practices with potential to be adapted to the Indian context. Some of the recommendations included in the publication revolve around incentivizing exploration, streamlining auction as well as regulatory processes and optimizing mining output by enhancing scales of mines. Reducing financing levies and development of infrastructure for last mile connectivity have been identified as two important factors for enhancing the sector’s competitiveness. The study also emphasizes the need for preparing a roadmap for mining leases expiring in 2020, promoting an institutional framework for mining and creating a digital, updated and credible national inventory of mineral resources.

The Mining Summit this year focused on enhancing mineral exploration to ramp up the mineral inventory and improving the resource pipeline. Discussions also revolved around facilitating private investment in exploration, attracting FDI by improving ease of doing business, enhancing mining operations by adopting latest technologies and scientific mining methods.

The International Rail Conference, coinciding with IREE, focused on rail infrastructure, advanced manufacturing and exports. Roundtables with Russian and German delegations were held with a view to inviting investments in railways and exploring joint ventures and collaborations. A comprehensive study on the role of railways as a key driver of growth was also released.

**STEEL**

As the second fastest growing producer and consumer of steel, India, along with China, has decisively swung the balance of power in the steel industry towards the emerging world. In this context, the CII National Committee on Steel focused on demand creation,
enhancing raw material security, making India’s iron and steel industry globally competitive and pitching for availability of adequate liquidity in steel ecosystem.

CII made a slew of recommendations to the government to build a thriving iron and steel industry in the country. Given that leases of around 285 mines were to expire by March 2020, the industry is likely to experience huge raw material constraints. To ensure seamless supply of raw material, it was suggested that the entire auction process be completed before March 2020. The government has been requested to ensure implementation of the scrapping policy, which is expected to reduce dependence on imports for secondary steel plants in India. Withdrawal of import duty of 2.5% on coking coal, PCI coal and ores and inclusion of steel industry, waste based fertilizers and soil conditioners in FCO were pushed for.

India is a much sought-after country due to abundance of skilled labour at competitive rates and the huge impetus being given to the infrastructure sector by the government. The seminar on Opportunities in Indian Steel Industry was organized in Dusseldorf, Germany in association with Ministry of Steel, MECON to encourage foreign investors, equipment suppliers and technology providers to set up and expand their manufacturing base in India. The India Steel Pavilion and the Seminar were inaugurated by Ms Pratibha Parkar, Consul General of India in Frankfurt.

In an interaction with Shri Dharmendra Pradhan, Minister of Petroleum & Natural Gas and Steel in New Delhi, CEOs highlighted the key challenges including raw material security, demand enhancement, investment in R&D and innovation in product development as well as trade policy issues.

The conference on Steeling India organized in New Delhi along with Ministry of Steel was aimed at increasing the steel intensity in key user sectors, especially in rural India.

**TEXTILES AND APPAREL**

The INR 150 billion textile and apparel industry has the potential to become INR 300 billion by 2030 and create 50 million additional jobs, largely for women in rural areas. To unlock this potential, the CII National Committee on Textiles & Apparel focussed on building competitiveness of this industry, reaching out to newer markets and promoting sustainable manufacturing practices in the entire value chain.

The key recommendations for faster growth of textile and apparel industry discussed with policymakers during the year included efforts for improving market access for India by focusing on bilateral arrangements with two key markets - European Union and the US. Promotion of textile-apparel value chain clusters closer to ports; closer
integration with the global value chains; promoting man-
made fibre to align to global fibre consumption patterns;
targeting new markets and attracting FDI into the sector
are a few necessary steps for the government. The
industry also needs to pitch in by focussing on value-
added exports leveraging innovation, sustainability and
lower turnaround times.

A proposal was made to the government to build
brand India by showcasing India as a manufacturing
destination and a supplier of ‘Triple A’ quality products at
competitive pricing backed by excellent service support.
New approaches towards handlooms and handicrafts
were also urged.

These challenges and recommendations were the focus
of discussions at the 11th edition of TEXCON, which was
attended by Smt Smriti Irani, Minister of Women & Child
Development and Textiles, senior government officials
and industry leaders. A focused exhibition of handloom
products, organized to mainstream the handloom sector,
saw participation of 15 states and a union territory.

A delegation of international brands and sourcing
companies was hosted in association with AMCHAM,
Hong Kong and AEPC to promote investment and
sourcing. Brands such as PVH, Carter’s, Gap, Pentland,
New Times, Ralph Lauren, VF Asia joined the delegation.
During the interactions, Smt Smriti Irani and senior
government officials shared details of the facilitation
center being set up to ensure seamless coordination
between the centre, states and investors in areas
beyond apparel such as technical textiles (agrotech,
medtech), jute, brand building initiatives and also easing
FDI in the sector. The delegation also visited the National
Institute of Fashion Technology (NIFT), Apparel Training
and Design Center (ATDC) and the Brandix Apparel
Park. The key takeaways from the visit include the need
for investing in cost competitiveness across fabrics;
iminizing dependence on government incentives;
investing in sustainable manufacturing as well as scale
and forging stakeholder partnerships and collaborations.

TRANSMISSION LINE

India is the 3rd largest electricity consumer in the world,
however, India’s per capita electricity consumption is
1/3rd of the global average. Energy security and robust
growth of power consumption at affordable pricing, will
be critical for India to achieve the USD 5 trillion dream.
Transmission capacity in India is growing at a steady
pace, with an average line length growth rate of around
6.5% over the last 5 years. This is expected to accelerate
further, with technological changes such as emergence
of electric vehicles. The increased demand for electricity
needs to align with the utilization of installed power
generation capacity. Achieving this quantum increase in
power requires major impetus to areas such as building
a robust pipeline of projects, making provisions in
EPC contracts as well as TBCB guidelines to facilitate
cost increase/working capital increase due to ROW &
associated farmer issues.

AMCHAM delegation members and senior government and industry representatives at an interaction with Smriti Irani, Minister of Women & Child Development and Textiles in New Delhi
The government’s impetus to the power sector, aided by ambitious plans to achieve 175 GW of renewable energy capacity by 2022, with equal distribution of power across the country has augured well for the sector. CII Transmission Line Division actively took forward issues such as Terminal Excise Duty (TED) refund benefit for projects under international competitiveness and for pushing investments in the sector. The recommendations of policy report for the power transmission industry, currently under preparation, if imbibed and implemented by the government, have the potential to place India’s energy sector on a new growth trajectory.

ASSOCIATIONS’ COUNCIL

CII Associations’ Council (ASCON) is an important forum that brings together 108 national level sectoral associations on a common platform. During the year, ASCON regularly reviewed industry performance and deliberated on challenges impacting growth. Policy recommendations were made to the government based on interactions with council members and other relevant stakeholders.

The government announced a stimulus package for the revival of the slowing Indian automobile and auto components sector. Many of the recommendations made in a joint submission along with the Society of Indian Automobile Manufacturers (SIAM) and Automotive Component Manufacturers Association of India (ACMA) found place in these announcements.

Other critical policy level issues raised by the sectoral associations, including cost and availability of capital, Regional Comprehensive Economic Partnership (RCEP) and FTAs etc were pursued with the government. Key aspects of RCEP were demystified by the Trade Policy Division, Department of Commerce, Ministry of Commerce & Industry, in the backdrop of an increasing need to understand India’s stance of remaining out of RCEP and its possible impact. The sensitivities involved and a possible stance on other Free Trade Agreements (FTAs) along with RCEP were also discussed during various sessions. Members shared their views on the draft Industrial Policy 2019 with the Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce and Industry in a special session.
Infrastructure development remains a major contributor to India’s economic growth. Every year a large part of investment is directed towards infrastructure development for building important national assets such as roads, highways, railways, airports, telecommunication and power, all of which form the foundation for economic growth.

Over the last few years, the government has given a significant push to enhancing the country’s infrastructure by providing financial support and fast tracking implementation of existing projects. While the government’s vision of investing INR 100 trillion in infrastructure over the next 5 years would give the much-needed push to the Indian economy, several areas requiring focused policy interventions and procedures need to be addressed for continuous growth.

CII thus engaged with key stakeholders to support overall infrastructure growth in the country. CII’s National Infrastructure Council and the various committees therein, focused on aviation, ports and shipping, smart cities and urban development, housing and real estate and railways, submitted multiple recommendations including highlighting issues concerning GST, banking support, arbitration issues and suggestions to enable ease of doing business.

**ADVOCACY**

A CEOs Forum deliberated upon the challenges facing the national infrastructure segment. The PPP model, used for infrastructure project implementation in many countries, is not very successful in India. The primary issues include accounts receivables from suppliers of goods and services under arbitration awards, arbitration matters, payment discipline and timely release of liquidity and structural reforms in the procurement process.

Two industry delegations to the Department of Economic Affairs, Ministry of Finance, raised issues concerning the infrastructure sector that needed
urgent attention and government support. The issues submitted to the government for consideration included non-payment to suppliers of goods and services under arbitration awards; amendments in the Arbitration and Conciliation Act better support for private participants; structural reforms in procurement processes; adopting international standards of contract documentation; enforcement of contracts; addressing liquidity issues; increased banking support and better financing strategies, amongst others.

The government has recently resolved issues related to 32 projects and continues to meet bankers to further facilitate other projects. While appreciating the bold steps taken by the ministry for fast tracking various projects, CII also raised the key issues and challenges facing the infrastructure sector with Shri Nitin Gadkari, Minister of Road Transport & Highways and MSME. The Minister apprised the delegation about various models to be adopted for upcoming infrastructure projects, NHAI reforms, government initiatives to address arbitration cases, liquidity issues, and aligning processes. Enhanced use of technology in road development, management and implementation of FASTags were also discussed. Industry suggestions on re-modeling of contract development were invited by the ministry.

Issues such as funds locked in arbitration; huge account receivables from PSUs; contractual clarity and bank guarantee against release of arbitral amounts were deliberated upon during a CEOs dialogue with Gen Dr V K Singh (Retd), Minister of State for Road Transport & Highways.

ACTION

Building Regional Infrastructure to Drive Growth of Economies (BRIDGE 2019) was held in Bengaluru, concurrent to EXCON 2019, South Asia’s largest construction equipment exhibition. Attended by about 70 key stakeholders, the conference threw light on building regional infrastructure for growth, raising finance for infrastructure investments and emerging technologies.

PORTS AND SHIPPING

ADVOCACY

The CII National Committee on Ports & Shipping took up the issues related to investments in the maritime sector and to improve operational efficiency through mechanization and speedy evacuations. Major issues raised with the government included benchmarking of port costs and trans-shipment tariffs, bringing in uniformity in pricing structure across ports, and allowing Indian ports to compete with international ports.

ACTION

About 30 CEOs attended a roundtable with Mr Gopal Krishna, the then Secretary, Ministry of Shipping and from other relevant departments. The discussions revolved around key issues in the maritime sector and allied sectors like such as fertilisers, chemicals and logistics, amongst others, with the objective of identifying possible solutions. CII shared with the government, details about the type of cargo presently being transported and expected commodity profile.
on different waterways, demand forecast for cargo vessels and other related services such as dredgers, pontoon cranes etc. Specific interventions required to attract cargo traffic on waterways were also illustrated. Going forward, action points on operations of inland waterways will be submitted to the Ministry of Shipping and Ministry of Commerce & Industry for policy revisions.

A stakeholders’ interaction was organized in partnership with the Inland Waterways Authority of India (IWAI) to promote inland waterways and coastal shipping as a mode of transportation for domestic and regional connectivity for cargo and passengers. Issues and strategies for creating opportunities for private investments, policy incentivization and linkages with new business models were also discussed during the session. It brought together key stakeholders from India, Bangladesh, Nepal and Bhutan on a common platform, to exchange perspectives and share the latest developments, policy updates, market insights and business prospects.

AVIATION

ADVOCACY

The key issues requiring government’s attention, as identified by the CII National Committee on Civil Aviation, included bringing Air Turbine Fuel under the ambit of GST; removal of throughput charges; easing MRO and air cargo operations, amongst others. A recommendation paper on these issues will be presented to the Ministry of Civil Aviation and concerned government agencies.

ACTION

The discussions during stakeholder interactions on Aerotropolis highlighted recent trends and developments in airport infrastructure development as well as economic opportunities that can be created through focused investments in and around the airport. Deliberations also focused on recent policies and regulatory initiatives required to promote development of cities around airports. The session showcased most noteworthy and promising technologies and solutions for building Aerotropolis in India.
REAL ESTATE AND HOUSING

Even as RERA and GST have created a robust policy and regulatory framework in India’s real estate sector, there is still scope for improvement and certain initiatives are still needed to make the sector stronger.

ADVOCACY

The CII National Committee in Real Estate and Housing submitted to the government various suggestions on addressing the challenges facing the sector. The specific challenges to be addressed included the lack of last mile funding; unsold inventory; challenges faced by SEZs; standardization of RERA and GST related issues.

ACTION

The workshop on Emerging Trends in Real Estate worked to create technology awareness within the sector and provided a platform for technology companies to share solutions towards achieving smart and green buildings.

SMART CITIES AND URBAN DEVELOPMENT

The Government of India formally launched the Smart City Mission in 2015, with an objective to develop 100 smart cities in the country. The mission planned to cover 100 cities till 2020 with the idea to promote cities that provide core infrastructure, a clean and sustainable environment and application of smart solutions.

CII formed three working groups focused on developing a framework for smart cities and urban development; standardization and deployment of best practices as well as sustainability, renewable energy and inclusion of ease of doing business.

Work on these three areas was driven through a series of dialogues and activities including a conference on role of technologies in smart cities and another which discussed how smartconnect-tech is redefining smart cities.
In moving towards a USD 5 trillion economy, the defence and aerospace sector is poised to be pegged at USD 26 billion by 2024, as promulgated by the government’s Draft Defence Production Policy 2018. In this direction, CII and the Society of Indian Defence Manufacturers (SIDM) have made efforts at developing a defence industrial base to support the Ministry of Defence (MoD), India’s armed forces and the industry for domestic defence business as well as to energize defence exports. To facilitate a sound environment for growth, focused efforts were directed at streamlining of procurement procedures and sustained linkages with the armed forces.

The seven major theme based programmes organized during the year covered more than 15 MoD-defence services-defence industry interactive issue-based sessions. Engagement with foreign governments and industry associations was enhanced through conferences attended by delegates from Brazil, France, Russia, South Korea, Sweden and USA amongst others and visits by Indian delegations to France, Israel, Japan, Norway, Russia and South Korea.

In addition, efforts continued in reaching out to the ordnance factories, HAL, base repair depots (air force), dockyards (navy), army base workshops (Indian army) and other DPSUs. The objective was to provide them access to cutting edge technology to accelerate the achievement of indigenization/import substitution goals under the Make in India initiative.

**ADVOCACY**

Comprehensive Review of Defence Procurement Procedure (DPP) and Defence Procurement Manual (DPM)

To dissolve procurement procedural bottlenecks, MoD undertook a comprehensive review of the acquisition/procurement process decreed by the provisions of Defence Procurement Procedures (DPP) 2016 (and its previous editions) and the Defence Procurement Manual (DPM) 2009. The objective is to ensure seamless flow from military hardware acquisition to life cycle support. There is also a proposal to create a separate dedicated chapter for air platforms in DPP. CII and SIDM, as members of the 14 sub-committees constituted by the MoD are providing inputs and drafting policy statements to review provisions of the DPP and DPM.

Rationalization of Field Evaluation Trials (FET)

Recommendations were made to redress the issue of prolonged trials upsetting the investment cycle. These included adopting a de-novo approach to field evaluation trials; establishing an integrated system for easy access to testing infrastructure for internal trials for
helping OEMs prepare better for user trials; trial team compositions; design and development cases, and User Assisted Technical Trials (UATT) to be considered as valid user trials.

Energizing Defence Manufacturing in India: Agenda for the New Government

A comprehensive reform agenda, submitted to the New Cabinet at the Centre, included suggestions about reforms to be undertaken to energize defence manufacturing in India. The following key recommendations were made:

• Promulgation of the Defence Production Policy 2018 at the earliest, to re-emphasize the stated intent to achieve self-reliance by 2025 and parallelly initiate measures to achieve this objective
• Creation of an enabling environment to foster collaboration between DPSUs/OFBs and private sector to create a win-win scenario, where capacity of both could be fully utilized
• Acceleration of orders, where trials have been completed
• Promulgation of a suitable policy for optimizing the scope of field evaluation trials under DPP.

ACTION

Linking Industry Capability with Users

To update the users with developments in the industry, DEFCOM 2019 was organized in partnership with the Corps of Signals, Indian Army. DEFCOM aimed at addressing the requirements of the tri-services. The NAVARMS 2019, held after 5 years with an objective to infuse indigenous armaments in the Navy, discussed the need for increased participation of Indian industry in the Navy’s fight category.

Nurturing Defence Technology

A platform for nurturing defence start-ups to develop technologies for non-combat warfare, the Army Technology Seminar 2019, co-hosted with the Army Design Bureau, saw the convergence of academia, industry and the defence forces. Two separate national seminars, one in collaboration with the Indian Air Force and the other with the Centre for Air Power Studies, provided the opportunity to discuss technologies to meet the modernization plans. A workshop on Technology for Armoured Vehicles was conducted along with the Directorate of Mechanized Forces. To build consensus amongst stakeholders, dialogues on policy guidelines and initiatives were hosted along with the tri-forces.

International Cooperation

To expand the Indian industry’s reach in the global supply chain and to establish India as a net exporter, regular meetings were held with heads of missions in India, the MoD and the MEA. The deliberations involved steps to increase India’s exports through existing government initiatives such as credit lines.

Indian industry interacted with OEMs from France, Israel, Japan, Russia, South Korea and Sweden in their respective countries as part of government delegations. The industry also explored opportunities with visiting delegations from Brazil, Czechoslovakia, France, South Africa, South Korea and USA.

From L to R: Rear Admiral Sanjay Misra, VSM, Director General of Naval Armament Inspection, Indian Navy; Admiral Karambir Singh, PVSM, AVSM, ADC, Chief of the Naval Staff, Indian Navy; Cmde Mukesh Bhargava (Retd), Chair, Committee on Marine Systems and General Bipin Rawat at the NAVARMS 2019 Exhibition in New Delhi
ADVOCACY

The CII Council on Renewable Energy (RE) advocated for industry issues right from the auction process to project delivery stage such as tariff caps, cancellation of bids and land procurement challenges. Some of the other issues that the council pursued during the year were related to lack of financial support for RE projects and ambiguity with regard to GST implementation. Operational concerns such as delayed payment by Distribution Companies (DISCOMS); forecasting and scheduling and transmission & evacuation were also taken up. However, the major issue raised with the government was the violation of signed power purchase agreements by state DISCOMs, which led to negative investor sentiments and questions regarding the sanctity of contracts.

The CII National Committee on Power pursued three key areas of concern during the year - transmission, DISCOMs and fuel linkage. CII continued to advocate for competitive routes for awarding transmission projects. The imperative of addressing the non-payment to DISCOMs from states, non-revision of tariffs and AT&C losses was highlighted to the policymakers.

The International Solar Alliance (ISA) appointed CII as the first-ever Convener and Secretariat of its task force, ‘International Committee of Chambers of Commerce & Business’ (ICCIB) for a one-year term (2018-19), with MEDEF International of France as the co-convener. CII led the secretariat in drafting Members’ Principles and in promoting the ICCIB through more than 15 international engagements across Abu Dhabi, Guatemala, El Salvador, Frankfurt, Munich, Paris, Lomé in Togo, Katowice in Poland, and New Delhi.

India’s target of 175GW RE capacity by 2022 needs parallel efforts to increase demand / offtake. In India, 50% power is consumed by Commercial & Industrial (C&I) consumers. In this backdrop, the Renewable Energy Demand Enhancement (REDE) initiative, started in 2018, continued to establish C&I consumers as a major commercially viable offtake segment for RE. Efforts included advocacy for developing a conducive policy landscape, increasing awareness of and inclination to adopt RE as a career option by mid-career executives of major corporates.
ACTION

During the CEO Dialogue with Shri R K Singh, Minister of State (I/C) for Power and New & Renewable Energy and Minister of State for Skill Development and Entrepreneurship in July, the minister assured the industry of land clearances for renewable projects; strengthening of transmission and evacuation infrastructure; strictness in power curtailment and avoiding delay in payments by DISCOMs (ensuring that states maintain sanctity of signed contracts); focus on new tariff policy; setting up additional independent regulators; requesting Reserve Bank of India to set up a separate limit for financing renewable energy projects and providing clarity on GST imposed on renewable energy components. At the session, the minister announced immediate implementation of the need for a Letter of Credit for the DISCOMs to purchase power.

In the first such stakeholder consultation on coal, nearly 70 industry representatives from power, cement, steel companies discussed with Mr Sumanta Chaudhuri, the then Secretary, Ministry of Coal, the impact of the Coal Ministry’s announcements in an effort to improve coal supply.

Ten newly elected Members of Parliament (MPs) attended the Energizing India series this year and some of the issues that were discussed with them included Andhra Pradesh’s notification to reopen PPAs; non-payment of dues by DISCOMS; transmission and evacuation issues faced by RE companies in various states and other regulatory issues.

In a survey based report called the Voice of Customer, drafted in partnership with AT Kearney, power customers have been segmented into four categories - domestic, commercial, industrial and agricultural. The survey assessed consumer satisfaction across three parameters - price, quality and connectivity. The report has revealed that customers are more focused on value-driven services rather than getting cheaper power. States with digital metering and accurate billing were rated higher on the customer satisfaction parameters. Similarly, consumer segments including agriculture, though paying higher power tariffs gave higher satisfaction ratings, if they had received 24x7 secure power. In the other CII study on global best practices in the transmission sector, the new systems that can be implemented from a globalized standpoint for a truly futuristic sector were tabulated. This was converted into a white paper titled New Age Power Systems in 21st Century India: Issues, Opportunities and Challenges.

The case studies on successful deployment of smart metering, presented during the Ministry of Power’s consultative workshop, highlighted three important points - moving to an OPEX/TOTEX model as CAPEX involves upfront deployment; organizing workshops on improving political will in smart metering implementation and inclusive deployment through appropriate skills development.

The REDE initiative was driven forward through a series of workshops as well as webinars with WWF-India. The 2nd year of the online executive education course ‘Corporate Renewable Energy Procurement in India’, was...
delivered in partnership with Imperial College Business School, London. Over 30, mid-to-senior level executives understood India’s central and state policies for renewables offtake, financing mechanisms, corporate strategies, and case study-based assignments. They also attended a live discussion with Dr Charles Donovan, Director, Centre for Climate Finance and Investment of the Business School. It was aired during an enGAUGE session on #GreenBiz: RE sponsible Corporate that also discussed future-readiness of corporates in an era of rapid energy-and-technology transition.

Conceived as a vision of Shri Narendra Modi, Prime Minister of India, ISA is a reflection of India’s commitment to universalize the use of solar energy. As on date, 83 countries have signed the ISA Framework Agreement. The 2nd ISA Assembly, organized by CII as an exclusive partner of the Ministry of New and Renewable Energy (MNRE), was co-chaired by Shri R K Singh and Ms Brune Poirson, Co-President, ISA and Minister of State for Ecological and Inclusive Transition, Government of France. Delegations from 78 countries, including 29 ministerial delegations participated in the dialogue. CII is an ISA Special Invitee and it has been associated with the first treaty-based intergovernmental organization since its inception in 2015. CII has also helped raise USD 3 million for ISA’s corpus, and this was formally acknowledged during the 2nd Assembly.

The role of renewables in preserving biodiversity and combating desertification, particularly in ecologically fragile regions and rural settings, where biomass is a major source of cooking fuel, can hardly be undermined. Renewables also have significant potential to create livelihood opportunities in such areas. The event themed Renewables in India: Towards Sustainable Development and Combating Desertification, held in partnership with the MNRE on the sidelines of the UNCCD CoP14, deliberated on these issues. MNRE’s programmes to meet lighting, cooking and productive energy needs were also discussed with special focus on the biogas programme, solar thermal applications, solar cooking schemes, and the recently launched PM-KUSUM Scheme.

India needs additional investments of about USD 80 billion in renewables to meet its 2022 goal, and approximately USD 300 billion by 2030. Innovative mechanisms include IREDA’s ‘green window’ initiative to attract private capital to the under-served segments of the market, with top contenders being storage, electric mobility, distributed renewables and energy efficiency. These were highlighted during the session on renewables in India, organized in partnership with MNRE, on the sidelines of the UNFCCC CoP25, Madrid. The event also underlined the need to catalyze private investment and expand India’s clean energy market through innovative risk mitigation and aggregation instruments.

**BIO-ENERGY**

**ADVOCACY**

CII is strongly aligned with the Government’s mandate for biofuels, blending in conventional fuels, and the efforts to include Compressed Bio Gas (CBG) as an integral component of India’s expanding City Gas Distribution (CGD) network. Through engagement with key stakeholders, efforts were made to build a conducive ecosystem to increase the share of bio energy in India’s energy mix. These included promotion of energy crops as income streams for farmers and developing supply chains for agri-residues, municipal waste, used cooking oil, and other sources of biofuels to ensure a steady supply for blending. The government’s efforts at creating a positive policy environment for this emerging sector has led to increased interest among corporates intending to diversify, as well as among entrepreneurs, in particular from the semi-urban and rural markets.

**ACTION**

Bio-energy is playing a rapidly expanding role in India’s economy, especially with respect to livelihood creation and organized entrepreneurship; for setting up of innovation and research centres and through the integration of biofuels into the mainstream energy
market. Over 200 delegates delved into these areas at the 9th edition of the Bio-Energy summit 2019 held in New Delhi. Shri Dharmendra Pradhan, Minister of Petroleum & Natural Gas and Steel, highlighted the importance of biofuels in ensuring India’s energy security and sustainable economic development, as well as the national mission to integrate farmers into the bio-economic system, by converting ‘annadatas’ into ‘urjadatas’. Shri Nitin Gadkari, Minister of Road Transport & Highways and MSME urged the industry to invest in energy crops, as well as integrate SMEs into this value chain.

ELECTRIC VEHICLES

ADVOCACY

In the light of the release of FAME – II in 2019, the CII National Committee on Future Mobility and Battery Storage worked towards developing a conducive ecosystem for India to transition into a sustainable mobility ecosystem by adopting appropriate solutions for the urban space, while being technology agnostic.

As India embarks on the strategic goal of transportation transition driven by energy choices, the industry agreed that the future of electromobility transition in India should focus on affordability.

The industry also urged the government to consider implementing the tight e-mobility transition timelines in a phased manner, supported by policy certainty and continuity. Additional requests were made to estimate the demand for e-mobility and develop a holistic infrastructure to support this transition.

ACTION

Key aspects of urban mobility, sustainable, responsible and shared mobility options, and the future fuels were discussed at the Future Mobility Summit 2019, which also co-hosted an exhibition. The conference was attended by Indian stakeholders as well as by a delegation from the UK.

A business delegation organized in collaboration with the Sweden India Business Council (SIBC) and Swedish Smart Grid Forum explored electromobility opportunities. B2B and B2G meetings with ecosystem stakeholders in Bengaluru, Mumbai and New Delhi were followed by a Smart Mobility Stakeholders Dialogue and an India-Sweden Finance Dialogue. A toolkit was developed through stakeholder engagement and secondary research.

HYDROCARBONS

ADVOCACY

Increasing India’s demand for natural gas from 6% to 15% by 2030 in the energy mix has been identified as being critical. Towards this end, the CII National Committee on Hydrocarbons is developing a roadmap. The CII National Committee on Hydrocarbons has formed two special core groups on Increasing Gas Demand in India and Make in India for the Hydrocarbons sector.

The two core groups will identify practical measures and initiatives to boost demand for gas in India in the short and the long term. A detailed note on the urgency of bringing natural gas under the GST ambit was submitted to the Ministry of Petroleum and Natural Gas.

ACTION

Recommendations to increase gas consumption in the country were presented to Shri Dharmendra Pradhan, during a CEOs dialogue on Energizing India which saw 50 CEOs from across sectors. The deliberations revolved aroundreviving the stranded gas-based power plants and using gas to balance the intermittent nature of renewables.
Driven by rising income levels, urbanization and millenial consumers, India’s Fast-Moving Consumer Goods (FMCG) sector has witnessed a remarkable transformation over the last two decades. While the long term industry outlook remains buoyant and positive, business headwinds have resulted in a consumption slowdown. In this context, the primary agenda pursued by the CII National Committee on FMCG has included policy facilitation and enabling enhanced sharing of perspectives amongst stakeholders, focused on major growth enablers that will help transform the FMCG landscape sustainably.

ADVOCACY
During the year, CII continued its endeavour to bolster growth and competitiveness across the sector through greater engagement with policymakers, with a view to creating an enabling policy environment and an environmentally sensitive FMCG ecosystem. Plastics being a critical element used across the industrial system, the primary focus was on promoting sustainability, by limiting its widespread usage and accelerating both plastic waste collection and disposal initiatives. Timely consultations were facilitated between the government and industry, in line with the broader goal of reviving growth and ensuring a favourable taxation regime.

ACTION
Reducing plastic consumption
CII mobilized members in implementing a series of initiatives targeted at reducing plastic consumption as well as augmenting waste collection and disposal activities. With the industry investing substantial man-hours in creating awareness and waste collection drives, large volumes of plastic waste were collected across India. Active involvement of volunteers from member companies across India helped accelerate these initiatives. Member companies synchronized their efforts with the public waste management system, by creating public private partnership arrangements for segregated waste collection and disposal. In consultation with members, a structured, time-bound and scientific strategy to tackle plastic management was initiated.

Promoting a growth oriented taxation regime
Phased changes were suggested to existing rules pertaining to budgetary support norms, working capital requirements, post supply discounts, CENVAT and GST regulations in the pre-Budget memorandum presented to the government.

Reviving growth
The CII National FMCG Summit under the theme Growth Wapsi: Revving up FMCG Growth, explored a range of strategies to re-engineer double digit sectoral growth. The discussions included the vital role of new product development in staying competitive, while driving penetration across markets. With environmental sustainability increasingly gaining traction amongst consumers as a core value, cost effective and innovative approaches to charting a more sustainable growth were also discussed. Success stories of organizations that have beaten the downturn and the bellwether trends indicating a strong FMCG revival were of particular interest to delegates.
SERVICES

Over the decades, the Indian services sector has played a pivotal role in creating highly skilled and productive job opportunities and is on track to contribute USD 3 trillion to the USD 5 trillion target. Covering the entire spectrum from trade to construction to research & development to consultancy and legal services, the sector currently accounts for 54% of India’s Gross Value Added (GVA).

Services inputs such as engineering, design and financial services are becoming increasingly prominent in global manufacturing, as they directly add value to manufactured products. The inputs that make up part of manufactured goods are becoming ever prominent and are increasingly being alluded to as the ‘servicification’ of manufacturing.

The sector that continues to achieve a moderate year-on-year growth rate of 7.5%, employs only about 25% of the nation’s population. In this backdrop, there lies a need for policy initiatives to boost employment generation as the country’s primary sector still employs 50% of the population. Given that the services sector is a net exporter, the government needs to build on the sector by creating an enabling environment to help further boost exports. Going forward, to boost exports, line ministries need to tailor strategies for specific countries for specific products within each segment of the services sector. A plan needs to be developed along with the concerned line ministries to create a holistic and robust environment for the nation to grow.

ADVOCACY

An active multilateral system with a focus on the GATS legal framework, including the formulation of STEPS (simplification, transparency, efficiency, predictability, and streamlining) is equally important. The 3 key barriers to trade in services were identified as complexity of domestic regulations, lack of mutual recognition of qualifications, and restriction on the movement of professionals across borders.

Specific issues of verticals within the services sector were pursued with the government. These included the need for an e-enabled time bound single window clearance, a better physical infrastructure and skilling in animation, AI & machine-learning for the media and entertainment sector. The emphasis on building the ecosystem to encourage medical value tourism was strengthened, given its potential to evolve into a focal point for foreign exchange in India.

From L to R: Maneck Davar, Chairman, Services Export Promotion Council and Chairman & MD, Spenta Multimedia Pvt Ltd; Sudhanshu Pandey, the then Additional Secretary, Department of Commerce, Ministry of Commerce & Industry; T M Vijay Bhaskar, Chief Secretary, Government of Karnataka; Justice Prathiba M Singh, High Court of Delhi; Piyush Goyal, Minister of Commerce & Industry and Railways; Jagadish Shettar, Minister of Large and Medium Scale Industries, Government of Karnataka; Rajesh Kumar I Modi, Deputy Minister of Industry and Commerce, Zimbabwe; Anup Wadhawan, Secretary, Department of Commerce, Ministry of Commerce & Industry; Vikram Kirloskar, President, CII and Chairman & MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor and Gaurav Gupta, Principal Secretary, Department of Commerce and Industries, Government of Karnataka at the 5th edition of GES in Bengaluru
The private sector was encouraged to take a lead in internationalizing education in India through development of institutions and faculty, provision of quality education, connectivity and affordable housing for students.

CII’s healthcare sector submitted recommendations related to upskilling of ASHA Workers and promoting convergence across payers, providers and producers.

In the evolving business landscape, digitization is the way forward for sectors such as transport and logistics sector and e-Commerce. It is crucial that the government pushes forth policy measures for implementation of advancements in technology and digitization, pivotal to driving the economy forward.

**ACTION**

With the global economic slowdown affecting all aspects of the Indian economy, the government’s initiative to boost the country’s economic growth by identifying 12 champion services sectors has arrived at the most opportune time.

The 5th edition of the Global Exhibition on Services (GES), organized with the Department of Commerce, Ministry of Commerce and Industry, and in association with the Services Export Promotion Council (SEPC) in Bengaluru, promoted trade and investment in services across countries.

An attempt at enhancing the image of the Indian services sector globally, GES explored 12 champion services sectors, encompassing participation from 55 countries and hosting sector specific knowledge sessions. GES 2019 saw 8,021 visitors, with 2,025 delegates and 214 exhibitors, with over 2,206 B2B and B2G meetings to promote India’s services sector.

**ART AND CULTURE**

Art and culture weave together the fabric of societies and nations by offering members a shared identity and heritage, thus contributing to social cohesion and nation building. In addition, they have the power to spearhead economic growth. Art and culture contribute to the country’s GDP, by generating both direct and indirect employment, through handmade crafts and arts, unique only to the country. In this context, the CII Taskforce on Art & Culture adopted a holistic approach to mainstream this sector, through public private partnerships.

The most significant partnership, undertaken by CII in this regard, was the India Pavilion at 58th Venice Biennale. CII co-organized the India Pavilion, spearheaded by the Ministry of Culture and curated by the Kiran Nadar Museum of Art (KNMA). The India Pavilion, themed 150 Years of Mahatma Gandhi, was a success put together in an impossible timeframe and provided a blueprint for making PPP as the way forward for the sector. Works of seven eminent artists, depicting philosophies and ideologies of Gandhi, were selected to represent India.

Several recommendations emerged from deliberations among the key stakeholders at the 2nd edition of the seminar on art and culture. Suggestions included making the India Pavilion at Venice Biennale a permanent feature; formulating an Action Group to drive initiatives in art & culture and designing innovative PPP models to attract private sector investments.

Government support in the form of schemes and tax incentives to encourage private collection; display and donation of art; provision of capital grants for projects; raising cultural bonds to finance city branding & placemaking projects and crowdfunding platforms to raise funds for conservation of heritage sites, monuments, art galleries were also proposed. To make art a part of the cultural fabric of the country, it was suggested that art installations be made in public spaces such as metro stations, parks and roundabouts.
FINANCIAL SECTOR

In a changing financial sector landscape, CII pursued the quest of creating an enabling environment for the sector’s development agenda. A special emphasis was placed on accelerating and sustaining growth of all segments through policy advocacy as well as on providing platforms for dialogues.

Insurance & Pensions

The CII National Committee on Insurance & Pensions presented an array of recommendations to Dr Subhash C Khuntia, Chairman, Insurance Regulatory & Development Authority of India (IRDAI).

ADVOCACY

Critical areas deliberated during the year included life and non-life insurance, annuities and innovation sandbox. IRDAI was requested to consider reframing the product approval process and remove the cap on commissions towards building a robust life insurance sector. The need for mandatory KYC and a clear definition of Motor Insurance terminologies and importance of annuities as a retirement solution were emphasized to the government.

ACTION

The 21st Insurance & Pensions Summit, where Chairman, IRDAI and other senior government officials shared their perspectives on the growth of the sector, also saw the release of a CII-PwC report on Assisted Distribution. During a closed-door interaction with IRDAI Chairman, Dr Subhash C Khuntia, members highlighted the reforms that could further strengthen the insurance sector.

Non-Banking Financial Companies

The National Forum on Non-Banking Financial Companies (NBFCs) discussed the status of the Indian NBFC sector and measures that could help achieve and sustain an upward growth trajectory.

ADVOCACY

Submissions on the liquidity crisis and its impact on NBFC and Housing Finance Companies (HFCs) were made to Smt Nirmala Sitharaman, Minister of Finance and Corporate Affairs as well as Reserve Bank of India (RBI).

Financial Markets

ADVOCACY

Amongst the many recommendations made to the Ministry of Finance, were views on methodologies to increase India’s weight in the MSCI index. A few of these recommendations found place in the budget announcements. SEBI’s in-principle approval of CII’s deposition to the PMAC Committee on Subsidiary Quasi Merger into Holding Company: Case for Delisting Exemption, is being followed up for changes in the SEBI Act. Representations were made to SEBI on amendment to PIT regulations for pledge of shares and on applicability of PIT regulations on NCDs / listed debt securities. SEBI Chairman agreed to examine the recommendations. Detailed issues and recommendations on taxation were shared with the Ministry of Finance for their consideration.
ACTION

The Financial Markets summit was a platform for both SEBI and members to present their ideas on the role of financial markets in India's quest to becoming a USD 5 trillion economy. Ways to develop the bond market in India; the need to develop securitization market; reforms required in the financial sector and best investment strategies were some of the issues discussed.

Private Equity And Venture Capital

Several unforeseen events in the financial sector hampered the credit outflow to the economy over the last few years. In this backdrop, Private Equity’s (PE) potential to fund the economy was explored at the CII-PEVC Industry Connect Summit. The deliberations revolved around the need to create an enabling regulatory environment for growth of PE & VCs, new fund investment strategies and leveraged buy-outs.

Financial Sector Development Council

Ministry of Finance acknowledged CII’s perspective on negative impact of the removal of merchant discount rate on revenue of the entire payments ecosystem.

FinTech

An interaction was organized with the Lord Mayor, City of London and his accompanying delegation. Many new partnerships between CII delegation and the UK delegation were forged. Further to this, under inter-committee partnership between CII National Committee on Insurance & Pensions and CII Taskforce on FinTech, CII assisted IRDAI to launch the Insurance Regulatory Sandbox with an objective to bring innovation in the Insurance sector. This was followed up with a workshop wherein IRDAI briefed participants on the advantages of participating in its regulatory sandbox. 

LUXURY

India’s luxury sector boasts of a wide spectrum of sub-verticals including apparel, accessories, interiors, cosmetics, watches, perfumes, automobiles, gems and jewellery, travel, art, real estate and technology amongst others. An increase in demand for luxury goods creates an indirect increase in jobs across the entire supply chain involved in the creation of the product/service. CII strives to facilitate skill development and employment generation in the luxury sector; promote Indian design globally and support Indian brands to get the deserved visibility at globally recognized platforms in the fashion, interiors and design space.

Efforts are directed at addressing industry concerns and working with the government in developing policies to showcase Indian products on a global platform, with an agenda to increase demand for Indian products. 

ACTION

The CII Core Group on Luxury, comprising highly acclaimed individuals from fashion, jewellery, watches, accessories, beauty, architecture, interior design and fashion magazines, is working to unleash this sector’s growth potential. The objective is to create a matrix that defines the sub-verticals and certification/classification for different verticals of the sector, to help define luxury in the Indian context.

A conducive policy environment to ensure a transparent, inclusive and level playing platform for the stakeholders is critical for the sector to develop a future-ready
ecosystem. While CII worked with the government to develop such a policy ecosystem, industry focused on employee skilling and productivity improvement.

During the year activities were undertaken to create awareness about the India opportunity among international brands, build an ecosystem for local brands to prosper and showcase skills of Indian craftsmen and weavers. In this direction, connections were also re-established with international associations such as Altagamma, Italy and Comité Colbert, France.

Delegations to international fashion destinations such as the Milan Fashion Week and Salone del Mobile, amongst others, were organized during the year to position India at global platforms.

**MEDIA AND ENTERTAINMENT**

The government has identified audio visual sector and services as one of the champion sectors whose growth potential can be harnessed both within and outside the country. One of the most dynamic sectors in India, modern technologies act as a key enabler for the M&E sector providing world-class services and intellectual property creation.

However, as the media and entertainment sector in India expands, stakeholders are facing severe challenges in critical matters of regulation in broadcasting, OTT and film; ease of doing business; taxation; increasing screen density; promoting Indian locales for film shooting; amendments to the Cinematograph Act of 1952 and skill development. The CII National Committee on Media & Entertainment engaged with the government with a vision to create growth templates and build a common platform for all verticals of the sector.

Regular dialogues on critical policy issues, conferences and events facilitated exchange of ideas for taking the industry to the next growth trajectory. M&E has a huge potential for contributing the country’s GDP, export of soft power, socio-cultural empowerment, job creation and skill development.

**ADVOCACY**

In this backdrop, CII created several stakeholder engagement platforms to deliberate on issues of importance to the sector. Despite various challenges, the Indian broadcasting sector has seen growth in the last decade especially in digital media. A relook at matters impacting the sector is important to ensure that the vision of the National Broadcast policy becomes a reality. A set of recommendations were made to the ministry, towards building a robust broadcasting industry that is a global hub for M&E, addresses diversity, is accessible, affordable and encourages innovation and creativity. These included recommendations on The Telecommunication (Broadcasting and Cable) Services Standards of Quality of Service and Consumer Protection (Addressable Systems) Regulations 2017.

Over the last 2-3 years, India continued the unique multi-modal growth pattern with TV growing organically and digital video consumption almost doubling. As these factors remain poised for growth, the industry also stepped up efforts towards growth, fuelled by a highly...
engaged set of consumers. CII supported the extension of co-production treaty services, such as audio-visual services, post production and VFX, where India has a competitive advantage. Several amendments were proposed to make the Cinematograph Act of 1952 more contemporary with the changing dynamics of the Indian and global cinema. Steps were proposed to stop piracy and deal with IPR infringement.

To address the challenge of low screen density, the Ministry of Information and Broadcasting was requested to set up a task force comprising state government representatives, NITI Aayog and key industry stakeholders to explore the faster issuance of licenses and permissions for film exhibition. Current issues facing the industry were addressed by TRAI Secretary and the Secretary, Ministry of Information & Broadcasting in separate interactive sessions.

**ACTION**

During the year, efforts were directed at promoting Indian cinema and other M&E industry verticals to help expand India’s global footprint in the M&E landscape. Participation in the Berlinale/European Film Festival, February 2020 in association with Ministry of I&B, was one such effort at projecting Indian Cinema, promoting shooting locales and filming related services in India. CII’s 18th consecutive year at the Cannes Film Festival / Market brought India centre-stage on the global front. The Opening Cocktails, hosted in partnership with the Cannes Film Festival, at the 16th edition of the Producers’ Network and Industry Workshops saw participation of a slew of dignitaries. In collaboration with the Ministry of Information & Broadcasting, CII participated in the Toronto International Film Festival 2019. The Indian delegation, through various interactions, promoted the Golden Jubilee edition of the International Film Festival of India (IFFI), Goa, as well as ‘ease of shooting films in India’ through the Film Facilitation Office (FFO) that facilitates single window clearance for film-makers and provides the platform for ‘film tourism’ in India. The delegation showcased India as a post-production hub and promoted collaborations for films with international production houses.

Participants at various international film festivals expressed interest in understanding the policy framework for co-production agreements and ease of doing business in India’s M&E sector. Stakeholders were also informed about government initiatives towards single window clearance for filming, multitude of shooting locales, and world class professionals in post-production and animation that the country has to offer.

The 8th edition of the Big Picture Summit 2019 aimed at outlining a growth path for the industry in an environment where favourable demographics, surge in smartphone adoption coupled with ubiquitous low-cost mobile internet, along with a truly customer centric experience are changing the rules of the game. The summit was a platform for policymakers, industry players and other stakeholders including films, broadcasters, OTT platforms, digital players and music industry along with gaming, animation to deliberate on these aspects. The summit also saw the release of a publication titled The Trillion (And Growing) Touchpoint Story–Recognizing the Modernization Conundrum, capturing the industry’s growth drivers, while revealing a path for a more sustainable future during uncertain times.

**MULTI NATIONAL CORPORATIONS**

Multi National Corporations (MNCs) continue to be large contributors to the country’s growth and development. They have constantly helped to bridge the gap in investment, providing employment opportunities, bringing in advanced technology, besides contributing to various social programmes, including health and education. This was facilitated by rapid FDI policy liberalization as well as creation of a more conducive business environment by the government.

The star-cast of Gully Boy, actors Ranveer Singh and Alia Bhatt, director Zoya Akhtar and co-producer Ritesh Sidhwani visiting the India Pavilion at European Film Market and Berlinale 2020
The CII National Committee on MNCs aims to enhance the contribution of MNCs to India, by further improving the policy and regulatory environment. It also works towards creating awareness about MNCs’ contributions to India and new government reforms.

**ADVOCACY**

Several suggestions were made to the government on issues related to royalty payment by listed companies, related party transactions, intellectual property rights, transfer pricing, anti-profiteering. Amongst others, ease of doing business related issues were considered favorably by the government. SEBI increased the threshold limit for royalty payments from 2% to 5% based on a CII representation.

**ACTION**

During a series of one on one meetings with DPIIT, efforts were made to resolve pending policy issues being faced by foreign companies. The government also invited MNCs’ feedback for improvement in the regulatory environment. Some of the prominent issues discussed included intellectual property rights, dividend distribution tax (DDT), GST refunds, transfer pricing, corporate taxes, data localization, national common mobility card (NCMC) provision, e-commerce and procedural issues amongst others.

Based on discussions on issues across sectors and states, an action plan was drawn up and various representations were finalized for submission to the government.

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**RETAIL**

The Indian retail sector has emerged as one of the most dynamic and fast-paced sectors, on the back of the entry of several new players. It accounts for over 10% of the country’s GDP and around 8% of the employment. Economic growth, changing demographic profiles, increasing disposable incomes, urbanization, evolving consumer tastes and preferences are amongst the key factors driving growth of India’s organized retail market.

The CII National Committee on Retail facilitates the sector’s growth and development by engaging with the industry and the government on critical issues. In this process, CII highlighted to the policymakers, the sector’s shared view on significant matters such as improving ease of doing business, modernization and adoption of technology, access to capital and employee upskilling.

**ADVOCACY**

With a view to creating an enabling environment based on a robust standard ecosystem and a conformity assessment platform, CII advocated the need for sectoral reforms, a modern National Retail Policy and a regulatory framework. Given that modernization will not only improve productivity, but also create employment opportunities, the government was urged to incentivize modernization. In addition, retail companies were encouraged to modernize the entire value chain. Limited focus on improving productivity, employee skilling and insufficient FDI inflow were identified as some key challenges affecting growth and expansion of the retail sector.

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*From L to R: Akshay Nagpal, Partner, L&L Partners; Manpreet Singh, Partner, KPMG; Ravinder, Joint Secretary, Department for Promotion of Industry and Internal Trade, Ministry of Commerce & Industry and Mohit Gulyani, Senior Director, Moglix at the CII India Retail Summit 2019 in New Delhi*
Traditional retail players cannot escape the importance of digitization and its potential to improve efficiencies in retail. Highlighting this imperative to the government, requests were made for creation of an enabling environment for the retail sector to seamlessly adopt efficiency enabling technology.

As consumer buying behaviour is increasingly digitally influenced, digitally researched and products are being digitally bought, e-Commerce is growing rapidly. While retailers are fast offering omnichannel presence, appropriate policy measures are necessary to allow for a smooth transition.

**ACTION**

Environment conscious and sustainable businesses need to take centrestage in an era of environmental decline. With awareness of the adverse impact of daily buying choices, buying behaviours have shifted towards sustainable products, sustainable retail and ethical brands. This has forced retailers to tailor their product and brand building strategies accordingly. The CII India Retail summit, themed Building Towards Sustainable Retail saw discussions revolving around the need for development of a robust and holistic environment that will enable India’s retail market to achieve the INR 1,200 billion target.

**SENIOR CARE**

As per estimates, by 2050, globally the 60 plus population will increase at 22% and outnumber the population below 15 years of age. India has not remained untouched by this distinct global demographic transition and the accompanying mega trends.

Across the developed world different types of senior care service formats that have emerged range from age-restricted independent living formats to specialized memory-care and continuing care retirement communities to home-care, provided within the person’s existing home ecosystem. Each format addresses a unique set of senior needs and requires specific hardware, software and skillsets at the service provider’s end. Inspired by innovations in global senior care, large Indian companies as well as start-ups have begun to design innovative solutions for this market.

Innovations to improve the life of ageing adults are being driven by the four pillars of mind, mobility, independence and integration of advanced technologies.

A robust ecosystem that allows for convergence of stakeholders and ensures promotion and provision of an effective and efficient delivery of senior care services, will be pivotal for a conducive senior care environment. Going forward, as the industry evolves, it will be important to have a standard definition of senior care formats, bringing uniformity in language and policy interventions.

In an effort to support the sector, the first CII Task Force on Senior Care was formed by bringing together service providers, thought leaders as well as senior care operators who collectively represent the senior care leadership in India. Collaborative deliberations amongst stakeholders from old age homes, service providers and thought leaders outlined the need for overall improvement, innovations and standardization of quality standards in senior care in India.

The 2nd edition of the Senior Care conclave, marking the International Day of Older Persons, showcased ground-breaking models and technology applications, for better senior care outcomes.

A report titled, Unlocking the Potential of the Senior Consumer Market, based on a Senior Consumer Market study, covered the consumer market in India and how the services being offered are constantly expanding, creating a platform for further opportunities.
TOURISM AND HOSPITALITY

Tourism and hospitality have emerged as instruments of employment generation, poverty alleviation and sustainable human development. Being a vibrant sector, it promises to make a significant contribution to India’s economic growth and development. The CII National Committee on Tourism & Hospitality thus plays a catalytic role in promoting and projecting as a mainstream industry and a major driver for India’s economic growth and employment.

ADVOCACY

CII advocated the setting up of an empowered National Tourism Board, with involvement of private sector and professionals, to enable faster clearances as well as formulation of long term and short term strategies. Considering the impact of widespread, interrelated global developments and advancements on tourism, a new draft National Tourism Policy (NTP) was formulated in 2015, but not approved. Efforts were made to further push for approval of the Revised NTP, a process reinstated in 2017 and 2018.

Kargil and Leh districts are of immense prominence in the newly formed Union Territory of Ladakh. The opportunity to build the Union Territory’s economy around tourism, given its potential to generate employment and livelihood, was highlighted by CII.

CII brought together the Minister of Finance & Corporate Affairs and the Minister of Tourism for the industry to raise one voice in favour of GST rates rationalization from 28% to 18% and 18% to 12%. The acceptance of this request made hotels in India competitive in both domestic and international markets. With a view to attracting 20 million foreign tourists to India, recommendations were made on fiscal, marketing and policy environment, as part of the 100 Days Agenda and 5 Years Agenda. The requests included conferring infrastructure status to the hotel industry; inclusion of hospitality/tourism in industrial policy; export status for tourism, feedback on CRZ guidelines and extending incentives for improving air connectivity.

ACTION

The India Pavilion was showcased at the China International Travel Mart, Kunming, in collaboration with the Ministry of Tourism, with a view to increasing tourism & trade. The objective was to attract Chinese tourists to India, including the Buddhist circuit. The Indian Heritage was also promoted through dance performances and Yoga sessions.

Over the last five years, to give a fillip to the sector, the government has implemented tourism focused schemes such as Prasad and Swadesh Darshan, shifted promotional activities to digital platforms thus improving international connectivity and rationalized GST rates and visa fees. In this backdrop, CII organized the 15th edition of the Annual Tourism summit to explore the economic growth opportunities offered by India’s tourism sector. Shri Amitabh Kant, Chief Executive Officer, NITI Aayog set forth the vision of a USD 50 billion tourism sector by 2022, while emphasizing the need for states to identify their strengths in tourism.
HEALTH AND LIFE SCIENCES

These are exciting times for the healthcare sector, both in India as well as globally. The tailwinds and opportunities presented by this sector are numerous. Over the last 72 years, India registered marked improvements in education, poverty and health indicators for millions of its citizens. India’s healthcare sector, known globally for quality healthcare, attracts foreign patients in large numbers.

One of the largest employers in the economy, the sector also meets the current societal need for accelerated growth and employment, with each hospital bed creating 6 direct and 5 indirect jobs. The healthcare sector successfully leverages traditional knowledge and technology to service the last mile and shift the point of care from hospitals to wellness centres and homes.

India’s private healthcare sector looks forward to intra as well as inter-sectoral stakeholder collaboration and is committed to serving improved access to quality healthcare to one of the largest populations in the world.

HEALTHCARE

The CII National Healthcare Council worked towards creating value for India’s healthcare sector by increasing sustainable interactions with governments, both at the centre and state, and by catalyzing stakeholder engagements towards improved patient care and health for all.

ADVOCACY

Multiple proposals were submitted to the Ministry of Health and Family Welfare (MoHFW), Ministry of Finance, Ministry of Commerce and Industry and to the Prime Minister’s office. Working closely along with Indian Medical Association, National Health Authority and Department of Health Research, inputs were provided on revised rates for procedure.

A detailed proposal was also submitted for the creation of a Healthcare Infrastructure Fund to enable hospitals to set up facilities in tier 2 and tier 3 cities.
A huge shortage of healthcare specialists has led to wage inflation in the country, with too many hospitals competing for a limited pool of doctors. Capacity building has been advocated as it is critical for the healthcare industry, which is the 4th largest employer in the country. The industry is also very important for the Indian economy as it employs a large number of women and marginalized youth.

Effective solutions were proposed to eliminate barriers that restrict people movement, with a view to promote India as a medical value travel destination.

The National Digital Health Blueprint 2019 lays down foundations for digital health delivery in India - it will enable using technology, Artificial Intelligence etc to augment capacity / skills of the sector, bring about a single pool / repository of patient health records accessible interstate and across private and public health systems and enable a seamless patient treatment, reduced costs on unnecessary tests etc as well as help capture the ‘missing middle’ and move towards Universal Health Coverage (UHC). CII has been involved in several multi-stakeholder consultations preceding the finalization of National Digital Health Blueprint (NDHB) 2019. CII also convened 3 regional level closed door discussions with stakeholders who would be directly impacted with the implementation of NDHB with the objective to present a proof of concept for the same.

**ACTION**

Various interactions were convened between private healthcare providers and the government. A joint working group was created to explore how greater transparency can be brought into costing and pricing of healthcare procedures and address common pain points in a unified manner. A proof of concept towards building a cohesive digital health architecture is under development along with the industry and MoHFW.

The 1st edition of Asia Health 2019 deliberated upon the future of health. The event offered a cohesive industry engagement with core cross sectoral policy dialogues and strategic exchanges, plenary sessions, focused capacity building workshops, bespoke B2Bs, industry delegations, disruptor talks as well as an exhibition of the latest healthcare technologies.

A study titled Making India a Health-tech Hub Vision Plan 2019-2024, released at Asia Health, projects the need to work in the healthcare delivery ecosystem with a focus on new technologies such as AI, Internet of Things, 5G telecommunications, big data, advanced robotics, and 3D printing.

**AYURVEDA**

During the year, CII gave further thrust to the efforts aimed at consolidating the ayurveda sector, developing a strong market presence for the products and promoting the sector as an integral part of the mainstream healthcare delivery. Apart from other initiatives during the year, CII also organized an interactive session between the Core Group on Ayurveda and diplomats from African countries.
ADVOCACY

The CII Ayurveda Core Group made several recommendations to the government towards the objective of mainstreaming ayurveda. It was highlighted that the MoHFW’s draft notification on Clinical Establishment (Central Government) Third Amendment Rules for healthcare providers, pertained more to modern medicine practitioners. In this light, information related to requirements of an Ayurveda medical establishment, that include both manpower and infrastructure, along with other infrastructural amenities for therapy centres, dispensaries and hospitals with more and less than 50 beds, need to be incorporated. MoHFW’s National Digital Health Blueprint lays down the framework for the evolution of a National Digital Health Ecosystem (NDHE) in India. Some key recommendations submitted included creation of several directories:

- The electronics directories need to build in a provision to identify and differentiate between facilities offering traditional medicine (such as ayurveda) from other facilities as well as disease management and wellness centres
- A manpower directory that provides information on certifications and work experience of the available workforce
- A nurses and paramedical directory that defines standards for allopathy and AYUSH disciplines. This will help provide necessary level of skilled health workers/therapists/nurses for different therapeutic procedures and medical conditions.

BIOTECHNOLOGY

Today, one in every three children in the world are vaccinated by Indian vaccines and India carries the maximum number of approved biosimilars in the world. The biotechnology sector is recognized as one of the key drivers to India’s target of becoming a USD 5 trillion economy by 2024. The sector was valued at USD 51 billion in 2018-19, with an aspiration to surpass USD 100 billion by 2025. This sector represents a vibrant ecosystem comprising innovative products and innovations pipeline with over 2,700 start-ups 600 plus core companies and 200 plus biotech & research training institutions.

CII National Committee on Biotechnology worked with the government and industry to create a global platform to showcase India’s biotechnology leadership, attract larger investments and forge international collaborations & partnerships.

Efforts were made to chart a robust, favourable policy framework to encourage an improved regulatory ecosystem to promote and position India as the hub for affordable innovation in biotechnology.

ADVOCACY

Leveraging existing capabilities and building further competitiveness, Global Bio India 2019 was the maiden venture of a partnership with Department of Biotechnology (DBT), Ministry of Science & Technology,
HEALTH INSURANCE

During the year, CII directed efforts at accelerating health insurance to drive greater coverage encompassing a larger percentage of India’s population. Multi stakeholder collaborations were forged to develop sustainable and higher growth of health insurance in the country.

ACTION

Ayushman Bharat has brought nearly 500 million people under health insurance cover. However, given the low levels of awareness about Ayushman Bharat, the need for campaigns amongst the eligible section of society was stressed.

In addition, the missing middle, a significant section of the population that sits just above the poverty line, does not fall under any insurance scheme. With a view to designing a standard product for the missing middle, contours of a vanilla health insurance product for the missing-middle were discussed during the year. The scheme proposes a top-up payment based on the payment capacity of the insured.

In pursuit of achieving universal health coverage, a model was developed along with National Health Authority of India (NHA), to provide insurance cover to the missing middle.
MEDICAL TECHNOLOGY DIVISION

Advancements in medical technology are playing a positive role in saving lives. Making an all pervasive impact, it transcends the upper crust of society, providing poorer sections access to better healthcare. The growth and development of this sector is critical for improving India’s performance on the healthcare index. CII works to leverage the potential of this sunrise sector and pave the way for ease of doing business for both Indian as well as multinational companies.

ADVOCACY

During the year, CII endeavoured to create a vibrant ecosystem for the growth of the sector. To build a robust regulatory system for medical technologies sector, the government was urged to avoid multiplicity of regulators, bringing them within the ambit of a predictable, globally harmonized set of regulations under the Ministry of Health and Family Welfare (MoHFW) and create a framework for regulating the quality and performance of medical devices.

Recommendations accepted

- MoHFW released a draft gazette notification outlining the process for regulating medical devices manufactured and imported into India
- CDSCO’s Drug Technical Advisory Board also approved the recommendation
- As an interim measure to amending the Act, a draft notification with a distinct definition of medical devices was released. A globally harmonized definition, it is in sync with the goal of regulating all medical devices. Currently, stakeholder comments are being collected and reviewed
- The grant of exemption to disposable dialyzers and micro-barriers for artificial kidneys, led to the correction of the Inverted Duty Structure on the medical device
- An in-principle approval was given for the implementation of Trade Margin Rationalization in terms of shifting from the arbitrary pharma-style pricing control to medical devices.

Recommendations under consideration

- Both MeitY and BIS responded positively to the request for exemption of accessories and spare parts for medical equipment from the Compulsory Registration Scheme to facilitate ease of doing business
- The suggestion regarding appropriate safeguards helped address the Ministry’s concerns with respect to misuse of the exemption
- The definition of critical care medical equipment (refurbished) under the Hazardous and Other Wastes (Management and Transboundary Movement) Rules, 2015 & Amendment Rules, 2016 is applicable to hazardous waste, whereas pre-owned medical equipment imported for refurbishment / after refurbishment are intended for reuse. Given that such medical equipment are neither hazardous nor a waste, the recommendation for exemption from the said rules was taken up for deliberations by Ministry of Environment
• The Andhra Pradesh government gave a positive response to the operational issue raised with various state governments. One such long pending demand is the harmonization of approval processes across District Appropriate Authorities of states to reduce the time taken for approval.

**ACTION**

A CEO’s panel titled Next 10 Years of Med-Tech Industry, was organized jointly with the Department of Biotechnology (DBT), Ministry of Science & Technology and Biotechnology Industry Research Assistance Council (BIRAC) at the Global Bio-India 2019 in New Delhi. A Joint Working Group brought together healthcare providers and players from the medical technology sector to explore areas of collaboration and to address multiple issues plaguing each side.

**PHARMACEUTICALS**

The Indian pharmaceutical industry, world’s third largest by volume, employing over 2.7 million, generated over USD 2 billion FDI inflows over the last three years. The industry has played a key role in driving better health outcomes across the world, through its affordable and high-quality drugs. The USD 40 billion Indian pharmaceutical industry has set itself the bold aspiration of growing at 11-12% to exceed USD 100 billion by 2030. In this backdrop, the government spearheaded a series of initiatives, in consultation with the sector, to tailor policies directed at spurring manufacturing and fostering research & innovation. The CII National Committee on Pharmaceuticals works to identify the imperatives that enable the sector drive its growth agenda.

**ADVOCACY**

Based on continuous industry interaction, several policy related suggestions were submitted to the Department of Pharmaceuticals, Department for Promotion of Industry and Internal Trade, NPPA, NITI Aayog, and the Ministry of Commerce & Industry. The areas of focus included foreign trade policy, Draft Gazette Track and Trace-API, India-Ethiopia joint trade, overall growth of pharmaceutical industry, including the regulatory framework, NLEM, R&D incentives, state-centre coordination and OTC policy.

The need for creating a stable regulatory environment, growth of API industry by minimizing raw material dependence on China and incentivization schemes for Indian industry were emphasized to the government. Government-industry collaboration towards building the global image of Indian pharmaceutical companies and strengthening industry-academia linkage to encourage innovation were highlighted as need of the hour. The government was also requested to explore enhanced investments, simplification of export procedures and revitalizing expiring incentives towards ease of doing business.

To ensure smooth implementation of the Draft Gazette Track and Trace-API policy issued by the MoHFW, it was recommended that a few steps be taken in advance. These include addressing the complexity of processes,
PUBLIC HEALTH

As India's healthcare sector continues to grow, the public health system has also registered substantial improvement in geographical and financial access. Yet, with only about 1.1% of the country’s GDP being spent on the public health system, India remains largely underfunded. Private sector investments in the public health system are likely to gain momentum in the coming years. CII works to catalyze private sector engagement towards enhancing promotive and preventive health practices focused on communicable and non-communicable diseases and leveraging the industry towards wellness at workplace initiatives.

During the year, specific efforts were made to engage industry in preventive health, by creating awareness on the need for early diagnosis of diseases such as breast cancer. During a series of closed door regional multi-stakeholder consultations, the breast cancer landscape in India was deliberated upon. Based on these regional consultations, key recommendations adopted by various state health systems will be presented to the government. The objective of these recommendations will be to improve care and management for breast cancer at the state level.

During the year, CII signed a MoU with the Central TB Division, Ministry of Health and Family Welfare (MoHFW) to catalyze the private sector participation in promoting a ‘TB Free Workplace’. Towards this, CII has already constituted a steering group and is currently working closely with the membership to sensitize corporates on TB across India.

ACTION

India’s pharma sector faces several challenges and these were deliberated upon by key stakeholders during the Life Sciences Conclave, organized in collaboration with the Department of Pharmaceuticals, Department of Biotechnology, Department of Scientific and Industrial Research. Some key areas discussed included regaining the lost glory of India’s bulk drug industry, quality competitiveness in domestic and global markets, investment landscape, vaccine industry and challenges towards enhanced vaccination coverage, role of digital transformation across the healthcare value chain and the way forward for pharma industry. Focussed small group discussions between the industry and the National Health Authority discussed collaborations necessary for implementing Ayushman Bharat and achieving the government’s agenda of UHC with supply of high quality and affordable medicines.
CII IN THE REGIONS
Eastern Region
North Eastern Region
Northern Region
Southern Region
Western Region
EASTERN REGION

The CII Eastern Region (CII ER) worked on initiatives tailored around CII’s India@75 vision by implementing action plans through the region’s state councils, zonal councils, sub-committees, task forces and working groups. Amongst other initiatives, the regional council facilitated ease of doing business and pursued state-specific issues with the government at the centre. Integration between the national council and the state councils was driven with the objective of overall growth and development of both the region and the country.

ADVOCACY

During the year, CII ER’s advocacy efforts centred around simplification, sustainable initiatives, ease of doing business, synergy and inclusion. CII engaged actively with chief ministers, ministers and senior government officials.

Aligned with CII’s overall policy advocacy agenda, the region made several recommendations to state governments and continued to contribute to policy formulation with a view to enhancing the business environment and attracting investments.

Bihar

Recommendations that the government is considering favourably include those on the revision of threshold limit for development of intra state transmission projects through Tariff Base Competitive Bidding (TBCB) and recycling and reuse of plastic waste generated by manufacturing units during packaging.

Chhattisgarh

To ensure enhanced competitiveness, recommendations were made for relaxing the conditions laid on mechanically covered vehicles for transportation of raw material waste etc and for increasing coal supply on account of the fuel supply agreement against backlog rakes. A petition was also submitted for establishment of captive solar power plants, to enable industrial estates in

From L to R: Neeraj Bisaria, MD & CEO, Premium Transmissions Pvt Ltd; Subir Chakraborty, Chairman, CII ER Trade Fair Taskforce and Deputy MD, Exide Industries Ltd; Pritha Sarkar, Secretary, Department of Industries, Commerce & Enterprises, Government of West Bengal and Sandeep Kumar, Chairman, Sustainability Sub-committee, CII ER and MD, Tata Metaliks Ltd, inaugurating Biz Bridge 2019 in Kolkata
Rajpur to break out of the Critically Polluted Area (CPA) and Severely Polluted Area (SPA) zones, as categorized under the Comprehensive Environmental Pollution index recently published by MoEF. The Government of Chhattisgarh and South Eastern Coalfields Ltd are evaluating the requests.

**Jharkhand**

To give a fillip to industrial development, the government was requested to acquire land for industrial purposes; fix transparent margin structures for IT manufacturing units; develop cold chain infrastructure and strengthen the storage infrastructure for perishable and non-perishable agricultural commodities. It was suggested that the government should set up subsidized vendor parks, where workshops can be set up to increase employment and build an organized service economy. Mechanisms for enhancing trader understanding of the difference between MSME and NSIC were also requested for.

**Odisha**

Representations were made to the state government to consider delaying the auction procedure for iron ore and for timely release of MSME payments by the State Corporation. A suggestion was made to increase the floor area ratio for real estate projects with green certification. To boost the start-up culture, the government was requested to eliminate statutory clearances for first few years after incorporation.

**West Bengal**

CII engaged with the Kolkata Port Trust (KoPT) and the Ministry of Shipping to allow Direct Port Delivery and the Customs Commissioner was requested to address airlines’ delay in handing over documents that result in Customs’ fines on companies. A proposal was made to encourage the use of Haldia, Mongla and Chittagong as transshipment ports for Bangladesh bound cargo from Kolkata, Haldia and Dhamra.

The final clearance for West Bengal’s second Dry Inland Container Depot, with multi modal transportation facility in Siliguri is pending due to an injunction placed by the Railways. The Government of West Bengal has backed this project as the largest infrastructure project in north Bengal. This has been submitted to KoPT and is under consideration.

**ACTION**

Throughout the year, various platforms were created for stakeholders’ engagement and to encourage action towards sustainable economic growth, development and enhanced competitiveness with inclusivity. These efforts were focused on issues and opportunities relating to digitization, disruption and Industry 4.0 amongst others.

Members interacted with chief ministers of states, industry ministers, chief secretaries and relevant bureaucrats as well as Members of Parliament from the region.

The Invest Bengal initiative was organized in Kolkata in partnership with the state government. The Odisha Mining Show, highlighting the region’s strengths in mining, was an integral part of 22nd Enterprise Odisha Show held in Bhubaneshwar. Visits to innovation labs of various companies under Innovation Clubs, a unique learning platform, provided students an opportunity to learn about the application of emerging technologies such as AI, ML and IoT in Industry 4.0.

**MSMEs**

Given that MSMEs are the fulcrum of any emerging economy, efforts were directed at making this sector globally competitive through innovation, market linkages and building resilience. While the CII Finance Facilitation Centres (FFCs) continued to provide advisory and credit facilitation support to MSMEs, CII ER created dedicated platforms to align all stakeholders.

Project SARTHI, introduced in Adityapur industrial region, is a step towards enhancing safety consciousness
and developing the requisite competency amongst MSMEs.

CII’s endeavour to connect small IT firms and start-ups with large IT organizations to explore collaborative opportunities and deliver better products and services, has been reasonably successful over the past few years. These initiatives have also helped to create job opportunities and explore emerging job skills keeping in line with the fast-changing ICT scenario.

As a result of the B2B session with financial institutions during the MSME Conclave, 2018, eighteen weavers from Fulia in the Shantipur cluster received a loan of INR 50,000 each from Bank of India under the MUDRA Loan Yojana, 2015. Such assistance will help achieve the aim of creating sustainable livelihoods, while spurring inclusive economic and social development and building a value based entrepreneurial culture.

The 6th edition of the MSME Conclave, held in 2019, took this objective forward by building conversations around techniques to enhance competitiveness.

Aimed at addressing the financial issues of entrepreneurs, creating awareness about funding opportunities, building capacity and sharing information about action by the government and other stakeholders, MSME Financing in Odisha brought together 120 MSMEs. An open house dialogue was attended by 10 National Banks including State Bank of India, Syndicate Bank, Union Bank of India, Corporation Bank and Allahabad Bank.

**Agri and Food Processing**
Revitalizing the farm sector, educating farmers in the use of fertilizers, post-harvest technology, machinery & equipment, doubling farmers’ income and building a robust food processing industry dominated the actions during the year. The Krishi Unnayan Mela, organized along with the West Bengal government, included tutorials on the latest farming practices and methods and showcased the state’s strengths in agriculture, farm equipment, emerging trends, techniques and markets.

Agribusiness conclave and Food Processing conclave were held in Kolkata with a view to building awareness amongst FPOs, state governments, financial institutions and other stakeholders about opportunities and existing schemes and creating market linkages. Food safety workshops for food safety supervisors in Kolkata and Food Safety Day celebrations for raising awareness amongst street vendors, were some of the initiatives undertaken by CII in the region.

**Special Initiatives**
A few special initiatives provided stakeholders an opportunity to deliberate, debate and also learn from the global best. Viral Marketing Guru, Prof Jonah Berger addressed over 400 executives at the Brand Conclave. Technology, innovation and disruptions were the focus of the Manufacturing Conclave and ICT East.


The other notable initiatives were the Safety Symposium & Exposition, Safety Symposium, Jharkhand, Legal

Education and Skill Development
The initiatives to enhance industry-academia collaboration for linking education to skilling, ranged from preparing a roadmap for educational institutions on interventions required in curriculum development to promoting innovation and entrepreneurship and employability and skill enhancement.

Making students future ready, a project launched in 2017, is enabling administrators, teachers and non-teaching staff in 7 West Bengal schools to adapt to the changing environment and to build student capacity. Completion of the first year of this project was celebrated by sharing success stories and best practices with stakeholders beyond the participating schools.

The School Excellence Conclave, themed Innovating Education & Educating Innovation, was a confluence of school administrators, government representatives, industry technology experts, and other stakeholders. Participants prioritized and addressed issues pertaining to innovation and went through a day of thought-provoking keynotes, inspiring case studies, and real-world presentations.

At the Higher Education Conclave organized in association with IIEST, Shibpur, academicians and education stakeholders deliberated on the impact of disrupting technologies in higher education. Vice Chancellors of 10 universities shared their views on transformed teaching techniques, reinventing faculty and innovation, with over 180 directors, principals and faculty members.

Skill East debated and outlined a strategy in consultation with international experts to build the skill sets necessary to meet both the domestic as well as global manpower requirements.

Beyond Business
The Social Entrepreneurship Conclave discussed how mission and profit complement, strengthen, or undermine one another, with a special focus on sustainability and business models that address various social issues. The conclave focused on how to build a community that enables entrepreneurs to work and the growth and transformation of social entrepreneurship.

At the 2nd Tribal Development Meet organized by CII in Ranchi, Shri Raghubar Das, the then Chief Minister of Jharkhand promised a 25% subsidy on all loans to SC/ST entrepreneurs. The state is already offering 50% subsidy on land to them for setting up industries, with a facility to repay the balance 50% in 10 interest free installments.

The CSR leadership training, led by CII CESD, helped participants learn how to draw up a CSR strategy, undertake impact assessment, SROI and outcome reporting. Sessions included increased community engagement, exit strategies and developing a long-term vision for social change, that complements the company’s vision, and improved engagement of board members.

Recognition of Excellence
Awards acknowledging benchmark practices in fields such as safety, health and environment, energy conservation, quality, productivity, supervisory skills and work skills were given in consonance with CII’s commitment to recognize exemplary work.
Indian Women Network

The Indian Women Network, operational in West Bengal and Jharkhand since 2017 and 2018 respectively, was launched in Bihar this year. Matters related to health and wellness, leadership and sexual harassment, amongst others, were pursued under the aegis of the network. The Conference on Breaking Down Boundaries, organized by the West Bengal Network Chapter, attempted to address challenges stemming from the societal culture of prejudices, overcoming biases at workplaces by promoting an inclusive approach by engaging women and the LGBTQ+ society as well as encouraging gender diversity.

Building International Linkages

During the year, CII ER continued to strengthen the international linkages that have been built over the years. Members of a business mission explored business and investment opportunities in Bangladesh, an emerging economy. During a visit to Nepal organized in association with the Federation of Nepalese Chambers of Commerce and Industry (FNCCI), opportunities for business and other collaborations between India and Nepal were discussed.

Membership Engagement

CII ER further deepened Membership engagement through member meets, roadshows and induction sessions. Meetings with members at CII premises across the 5 states and sharing of information through the e-newsletters helped disseminate CII’s initiatives throughout the year.

Reports and Publications

Some important reports and studies released during the year, that serve as referral points for industry leaders, government and the civil society include:

- CII - BCG Report on Decentral Energy and DISCOMS
- CII Sumedha Report on The Insolvency & Bankruptcy Code 2016: The first 36 months over and still evolving
- CII Report on Compliance to Risk Management: Encashing Your Rewards
- CII - Aquilaw - ISB whitepaper on India Inc: The Curious Case of Missing Women at the Top
- CII - LSI Report: Turnaround in the Indian Banking Sector - A Fact Check
- CSR Compendium 2019
- CII Report on Industry 4.0 in Mining & Metals
The north eastern region of India holds immense potential for economic growth. Development of the NER remains high on the agenda of both, the central and the state governments. In supporting this agenda, CII North Eastern Region (CII NER) launched multi-dimensional initiatives in close partnership with the government and industry over the last 15 years. The objective has been to mainstream the region, infuse sustained and equitable growth and set up growth engines for accelerating economic and social development.

**ACTION**

During the year, CII NER launched several initiatives focused on promotion of investment and market linkages, development of infrastructure & cross-border trade relations, showcasing handloom & handicraft products, skill development and capacity building amongst others.

**Engagement with Government**

Reduction of import duty on Vietnamese bamboo from 30% to 10% and the categorization of incense sticks in free import category severely impacted Tripura’s market share of bamboo sticks supplied to the incense manufacturing sector. About 2 lakh women, working in agarbatti stick manufacturing clusters producing 25,000 MT per annum, were at risk of losing their livelihood. Based on the CII recommendations made to the 16th Finance Commission, the Ministry of Commerce & Industry shifted the import of agarbatti sticks from free to restricted category, thus bringing relief to the sector.

CII continued to partner the state governments in the journey of growth and development of the region. One of the challenges facing Assam is the rapid migration from rural to urban areas, putting extensive pressure on the urban infrastructure. In addition, increasing habitation in the hills has resulted in land erosion, artificial floods and several other problems. CII highlighted to the government initiatives and solutions to cope with these challenges of urbanization.

Shri Siddhartha Bhattacharya, Minister of Guwahati Development Department, Law & Justice and Cooperation, Government of Assam, who led these discussions, was joined by senior government officials, engineers and architects.
A feasibility study of the market, demand analysis and problems that need addressing were submitted to the Software Technology Park of India (STPI). This study was conducted in support of the Government of India’s vision to set up eight centres of excellence in the North East, one each for development of products/solutions for IoT in agriculture, gaming, emerging technologies, IT applications in graphic design, healthcare, GIS, animation and data analytics.

Hydrocarbons, Oil & Gas

Oil & gas industry is a core sector contributing immensely to the state exchequer and the industrial demography of north east India. Natural gas and petroleum sector, including exploration, production, refining, transportation, and marketing contributes significantly to the region’s GDP. The importance of this sector is multiplied manifold when the contribution of derivative sectors such as power and fertilizers is taken into account.

The 4th edition of the North East Oil & Gas Conclave was thus aimed at accelerating development momentum of the oil & gas sector and sustaining the growth trajectory of the hydrocarbon prosperous north east. Reorienting policy interventions, understanding technology trends, performance & business models, actions for enhancing production were discussed at the conclave, with a view to augmenting and shaping the future of oil & gas in the region.

Stakeholders from government & allied agencies, regulators, upstream, midstream and downstream players from the value chain also discussed the challenges, the fiscal interventions and the approaches required to spur a hydrocarbon led economic growth and the way forward for the industry.

Agri & Food Processing

To ensure progress and development of a state, the Prime Minister of India set the vision for Aspirational Districts to work towards developing quality products that can be exported. In line with this vision, the Government of Tripura is leveraging the potential of its state fruit - pineapple. Building on the export of 30 MT of pineapple to Dubai and Doha in 2018, the state exported 130 MT in 2019 by adding Bangladesh and the local hubs in Assam, West Bengal and Delhi.

The 4th edition of the Tripura Pineapple Festival, held in Agartala, provided a further boost to this product that has the potential to double farmer income in the region. The then Governor of Tripura, Prof Kaptan Singh Solanki was joined by Dr Sudha Mysore, CEO, Agrinnovate India Ltd in highlighting the government initiatives for the agricultural sector and the farmer training organized.

Other Initiatives

Efforts to sensitize the business fraternity on the changes and growth potential continued in pursuit of CII’s MSME development agenda. The North East MSME Summit for SC/ST Entrepreneurs, organized in Assam in partnership with the Ministry of MSME, Government of India, was a step in this direction.

MSMEs from the NER states learnt from the best practices shared by experts. They also met potential vendors, and got the opportunity to establish business
and financial linkages. Shri Sarbananda Sonowal, Chief Minister of Assam and Minister of State for Animal Husbandry, Dairying & Fisheries and MSME, Shri Pratap Chandra Sarangi, shared information about government schemes for start-ups and business expansion. The focus sectors of the summit included agri & food processing, handloom & handicraft, tea & coffee, piggeries, aromatic & medicinal plants, bamboo & cane and tourism and hospitality.

The unique characteristics of next generation workforce, such as the need for balancing personal aspirations and organization vision, employee retention and leadership development from within, require new people practices and policies to be imbibed. These new age challenges and opportunities were discussed at the HR Conclave 2019, themed Moulding the Next Gen Workforce, held in Guwahati.

While both multinational and private banks have limited presence in the region, a widening network of scheduled commercial banks is playing a crucial role in mobilizing savings in the region. Further, commercial banks and co-operative banks are the only formal channels providing rural financial intermediation in the north east. Against this backdrop, CII's Finance@North East deliberated on critical matters such as the potential and challenges for financial services in the digital era, financing issues related to infrastructure in the north east and the possible redressals. A workshop on Building Competitiveness amongst MSMEs and a meet that brought together bankers and entrepreneurs discussed issues in bridging the gap between stakeholders.

The Industry-Academia Conclave, organized along with the Assam Science and Technology University (ASTU), aimed at establishing a link between industry and academia, more specifically the engineering institutes. The interactions on realigning science and technology education and research towards industry needs provided students and faculty with insights on industry requirements. Engineering students and members from the industry also attended a workshop on water and wastewater management, organized in association with ASTU in Guwahati. Led by CII-Triveni Water Institute, the workshop provided participants insights on intelligent water solutions, WATSCAN, WatSmart, water audits and innovative water treatment solutions.

As cybercrime becomes more organized and a highly complex network brings together individuals at the global level, the cybercrime challenge for India cannot be undermined. To deliberate on solutions and a way forward, CII organized a brainstorming session on cybercrime with the Additional Director General of Police and the Secretary, IT Government of Assam. Senior officials from BSNL and various key stakeholders participated in the discussions.
India’s northern region is not only the largest in terms of geographic area, but also in terms of its contribution to the country’s GDP as it consistently outperforms the national GDP.

Adopting a holistic approach to facilitating strategic communication between industry stakeholders and the government, CII Northern Region (CII NR) worked towards realizing the development goals and socio-economic development of the region, while contributing to nation building. Sectors of paramount importance included MSMEs, finance, innovation, technology, clean energy, agriculture, food, healthcare, manufacturing, and infrastructure amongst others.

CII NR partnered in two mega investor summits, Rising Himachal Global Investors’ Meet 2019 in Dharamshala and Progressive Punjab Investor’s Summit 2019 in Mohali, with positive outcomes for the regional industry.

**ADVOCACY**

**Enabling Policy Framework**

With an objective to accelerate the region’s growth, CII played a fundamental role in voicing industry challenges and making representations to both central and state governments. The deliberations with the government revolved around ensuring ease of doing business, improving existing norms, attracting new investments and overall progress of local industry. Based on meetings and interactions, policymakers accepted several of the recommendations given below and are favorably considering many others.

**Accepted Recommendations**

**Haryana**

- Handholding companies opting for self-certification and rectification of anomalies by government officials

*Narendra Modi, Prime Minister of India addressing the Rising Himachal Global Investors’ Meet in Dharmshala*
• Discrepancies encountered while making payments towards Labour Welfare Fund, due to dysfunctional server were resolved
• Suggestions for smooth functioning of the online portal were accepted by the Labor department
• Issues related to online E-1 forms were resolved.

Himachal Pradesh
• Exempting MSMEs from specific inspections to enhance EoDB, efficient functioning and sustainability of operations
• DPIIT released INR 204.80 crore to CBIC under the Budgetary Support Scheme
• NHAI agreed to construct a four-lane road on the Pinjore-Baddi-Nalagarh stretch
• Unfair and monopolistic trade practices of truck unions rationalized to a large extent with freight charges being reduced.

Jammu & Kashmir
• Enabling conditions were implemented to help local employers access incentives under the State Industrial Policy, 2016
• Processing of GST refund orders was expedited

Delhi
• Revision of minimum wages in Delhi for unskilled, semi-skilled and skilled categories and CII’s involvement in the advisory board instituted for it.

Punjab
• Rationalizing VAT on PNG from 14.30% to 3.0% to provide industry access to cleaner fuel and reduce use of polluting energy sources
• The recommendation for setting up cold chain facilities at the Chandigarh airport to enhance export of agri perishables was implemented and is likely to be completed within the year
• A Ground Water Authority for Punjab was formed; proposal for participation of select CII Members in the Joint Task Force was partially accepted
• A Council was established in Fatehgarh Sahib, in acceptance of CII’s suggestion to set up district level facilitation councils to resolve MSMEs’ issues related to delayed payments.

Rajasthan
• Setting up of additional MSME Facilitation Councils to resolve pending cases was accepted
• Captive power rates for the state was reduced, based on a CII request
• The Rajasthan Export Promotion Council was set up in acceptance of CII’s recommendations.

Uttar Pradesh
• Single window clearance portal, ‘Nivesh Mitra’ is operational and serving a variety of functions such as mapping of industrial land, obtaining building plans, obtaining NOC from fire department, amongst others.

Uttarakhand
• Removal of Mandi Tax on exports by merchants not registered with SIDCUL was accepted

Recommendations under Consideration
Several of CII’s recommendations are under active consideration by the central and state governments. These include:
Chandigarh

- Reconsideration of select plastic packing, as per industry requirements, identified as single-use, especially in the case of multi-layer packaging that does not have sustainable alternatives.

Haryana

- Corrective measures for reducing passenger tax to encourage shared mobility
- Amendment of clauses pertaining to deployment of female workers in night shifts, including provisioning of ‘well-defined’ security systems
- Arbitrations regarding TDS deduction vis-à-vis electricity bills in certain areas of the state and unfulfilled statutory requirements of the Income Tax Department are in progress
- Roll-out of the Fixed Term Employment Scheme through a notification
- Promotion of NRSE through equipment manufacturing and setting up an integrated NRSE manufacturing park with designing hub and testing facilities
- Implementation of GIS and digitization of land records.

Himachal Pradesh

- Abolition of Certain Goods Carried by Road (CGCR) and Additional Goods Tax (AGT) is under evaluation
- Implementation of Amnesty Scheme for one-time settlement of old VAT cases

Jammu & Kashmir

- Extension of fiscal incentives to the J&K industry, under the GST regime
- Toll exemption on import of certain fuels for metallurgical processes
- Disposal of cases filed under MSME Samadhaan and Micro and Small Enterprise Development (MSMED) Act, 2006
- Release of payments to J&K’s MSME units that have supplied items to PDD for implementation of ‘Saubhagya Scheme’.

Delhi

- Suggestions pertaining to higher education landscape of Delhi were partially accepted.

Punjab

- Recommendation to revise 1 ECS per 100 square meter of parking space to 200 square meters for the garment industry
- To incentivize green practices and investment in eco-friendly technology, PPCB to consider levying fees on the basis of capacity of discharge generation
- Capping of power tariff by PSPCL at INR 7.50 per unit
- Reducing the number of documents required for obtaining electricity connections to proof of ownership/occupancy and document of authorization
- Relaxation of rigid labor laws, such as reducing and
limiting extra wages for overtime from 2 times to a maximum of 1.5 times; reducing the number of registers and returns and amicable resolution of disputes between government boards, corporations and the industry through a suitable OTS policy.

Rajasthan
- Representation towards converting Jaipur’s sick industries and vacant industrial plots to food parks is being favorably evaluated
- Issues related to Pollution Control Board are partially resolved and consent to operate has been facilitated for the industry.

Uttar Pradesh
- To promote green innovations and counter environmental pollution, it was suggested that GST on certain products that use agricultural refuse as their raw material be reduced to nil
- Enhancing engagement between recruitment departments of various companies and skill development centers, such as PMKVY
- Suggestions have been made to encourage UPSIDA and Nagar Nigam’s active involvement in maintenance of industrial areas.

Uttarakhand
- To make Inland Container Depots more competitive and reduce costs, it was recommended that Phytosanitary Certificates be issued locally
- Creation of a Multi Modal Logistics Hub in proximity to industrial units, as well as the existing railway track(s), is under consideration
- A request has been submitted to make Saharanpur/Tapri a halting station on the Dedicated Eastern Freight Corridor
- A scheme for budgetary support under the GST regime to units located in Uttarakhand is proposed.

Stakeholder engagements were further strengthened through 25 reports released during the year. These include reports on ‘India’s Electricity Distribution Companies - Trends and Way Forward’, ‘Food Processing and Dairy Industry Challenges, Solutions and Sustainability’ and a study on ‘Diversity and Inclusion at Workplace’. A 10-point growth agenda was submitted to each of the states and union territories in the region (8-point growth agenda for Ladakh), outlining a roadmap for progress and details of the proposed focus sectors.

ACTION
Several activities and initiatives were undertaken by the region in 2019-20, in collaboration with the government and industry, creating platforms for interaction and facilitating networking amongst key stakeholders.

Building Manufacturing Competitiveness
Enhancing industry competitiveness to infuse excellence, catalyze innovation, promote technology and digitization and thereby stimulate employability and productivity across a variety of domains is a key objective pursued by CII. In this backdrop, 12 Quality Circle Competitions were organized in the region to encourage adherence to quality parameters by industrial units. More than 40 manufacturing excellence missions provided experiential learning to participants by visits to plants of companies such as Alstom India, Honda Cars, ABB India, JCB India, Escorts Ltd, Schneider Electric, Modern Rail Coach Factory and many more. A 10-member CII delegation participating in the 2nd edition of the Learning Mission to Germany visited Bosch Rexorth, Audi Group, Trumpf AG and the Siemens Skill Centre at Stuttgart and Berlin, marking yet another milestone in providing world class exposure to Indian industry.

Over 64 workshops and training sessions helped build skills in areas of contemporary relevance. A series of conferences on new and emerging technologies propagated adoption of digital operations by companies. Efforts were directed at building awareness on Industry 4.0, its applicability and possible benefits through the Conference on Achieving Excellence in Manufacturing; Manufacturing Innovation Conclave; International
Automotive Supply Chain Conclave; Conference on Quality Manufacturing; e-Mobility Summit; Symposium on Business & Manufacturing Innovation and the Telecom Convergence Summit.

**Promoting Investments and Expanding Horizons**

The concerted efforts at establishing linkages between Indian industry with global players, state and union governments, policymakers and other key stakeholders enabled them to explore newer markets, attract investments and diversify businesses globally. Encouraged by the tremendous growth recorded in the past and the need to attract both domestic and international investments, the Rising Himachal Global Investors’ Meet was organized with the Government of Himachal Pradesh at Dharmshala. The Prime Minister of India, Shri Narendra Modi, inaugurated the event. Shri Piyush Goyal, Minister of Commerce & Industry and Railways witnessed the signing of 610 MoUs worth INR 93,000 crore with the state government at the event that was attended by over 4,000 delegates.

At the Progressive Punjab Investors’ Summit, Chief Minister of Punjab, Captain Amarinder Singh, highlighted the efforts being made to provide an enabling ecosystem to the industry and encouraged them to invest and expand in Punjab.

The 8th edition of Invest North, organized at Bengaluru was an exclusive platform to highlight investment opportunities in the states of Punjab, Rajasthan and Uttarakhand. Shri Trivendra Singh Rawat, Chief Minister of Uttarakhand; Shri Manpreet Singh Badal, Minister of Finance, Government of Punjab and Dr Subodh Agarwal, Additional Chief Secretary – Industries, Government of Rajasthan led their delegations in engaging with business and industry leaders from Karnataka.

Trade fairs continue to remain indispensable to CII NR’s efforts to reach out to stakeholders as well as consumers through value added products and services. The 22nd edition of CII Coolex and the 24th edition of CII Chandigarh Fair brought a variety of products at a single venue for the customers to choose from.

US Senator Mr Robert Menendez discussed with select CII Members, the scope of expanding business collaborations between US and India, especially in the backdrop of the current global economic scenario. Ms Nina Tangri, Parliamentary Secretary and Representative of Minister Fedeli, Member of Provincial Parliament, Ontario, Canada shared the possibilities for associating with Indian industry and also provided valuable policy insights with respect to such partnerships.

**Sectoral Initiatives**

The 11th edition of TEXCON 2019 drew meaningful conversations amongst players from the Indian Textiles sector. Smt Smriti Irani, Minister of Women & Child Development and Textiles, highlighted the need for the sector to create a unique identity for traditional textiles by building on the country’s heritage, while taking into account sustainability and industry compliances.

While the road to success begins with quality education, equality in schooling remains a major challenge in India.
This challenge continued to be the focus of the School Summit, which was addressed by Shri Yogi Adityanath, Chief Minister of Uttar Pradesh.

Ministry of Tourism, Government of India, Department of Tourism, Government of Rajasthan, Young Indians (Yi), the CII-IWN, Rural Non-Farm Development Agency (RUDA) and Rajasthan Khadi & Village Industries Board came together with CII for the 7th edition of Jaipur by Nite that hosted around 5,500 participants.

CII NR facilitates growth and development of various domains in partnership with industry and other stakeholders. Initiatives such as the 2nd Apple Conclave 2019; Rajasthan Digitech Summit; CII-UCOST 10th Environment Summit; Smart Cities Conference; Conference on Shaping Healthcare Ecosystem in Punjab; Realty 2019; Conference on Profitability through Energy Conservation & Efficiency; UP Health Summit; 3rd HR Crystal Ball; Energy Conclave; Infranet 2019; Sugar Tech 2019; Series of Innovative Farmers’ Meetings in Punjab, Haryana & Uttar Pradesh; CII NR Edu Summit 2019; Conference on Retail, Consumer & Food; CII Artificial Intelligence Conclave and CII Healthcare Summit built a dialogue around the respective sectors. The Conference on Digital & Cashless Economy and the 14th India Surface Coating Show saw participants delve deep into the challenges & opportunities offered by these and other significant sectors.

Engaging with Society

CII strongly believes that it is essential to engage with society and citizenry at large, to accomplish an all encompassing sustainable development. In this light, CII NR urged members to serve the communities they operate in and contribute to the nation’s growth. Several endeavors facilitated the adoption of corporate social responsibility and affirmative action as an actionable business agenda by corporates. The Young Indians (Yi) and Indian Women Network (IWN) chapters in Jaipur, Chandigarh, Lucknow, Delhi and Noida continued to contribute to society through various grass root interventions.

In Trilokpuri and Anand Vihar, Delhi residents were made aware of waste segregation. They were mobilized to manage household waste and adopt eco-friendly practices including converting waste into manure. CII’s YUVA Initiative along with Delhi Police and NSDC helped over 5,000 underprivileged youth to gain a dignified livelihood. Conferences such as Women First, voters’ awareness sessions, medical camps for industry workers and students, plantation drives, celebration of World Environment Day and World Earth Day and job fairs engaged the community both, directly and indirectly.

Membership Connect

Industry members form the foundation of CII NR’s endeavors to drive growth and development in the region. In continuation of the previous years’ efforts, engagement to better acquaint with members’ expectations remained a critical agenda. Apart from members’ meetings organized by the local offices, newer outreach models were designed to establish membership connect. Nine roadshows, organized at 8 different locations, were attended by over 500 plus members; 19 members’ meet, held in 12 locations served as a platform for approximately 950 members to voice their opinions and exchange their thoughts over the industrial climate. Existing CII members familiarized 148 participants with CII, during the 12 new-member-induction-meetings in 9 different cities.
SOUTHERN REGION

India’s southern region has turned into a bastion of economic growth and development, with the presence of vibrant manufacturing and services sectors. During the year, CII Southern Region (CII SR) focused on key enablers of competitiveness that echo in the pillars of India@75. These included policy advocacy on ease of doing business, MSMEs, education and skill development, entrepreneurship and start-ups and membership engagement.

ADVOCACY

During the year, CII continued to engage with state governments towards ensuring sustainable and inclusive growth in the region. Interactions with governors, chief ministers of the southern states, union ministers and secretaries to various ministries provided the platform to raise concerns and suggest measures to improve the overall business climate in the country. CII SR’s engagement with various task forces and committees of southern state governments led to several key outcomes on the policy front. Representations on 62 committees in the region helped in articulating the industry ideas, concerns, solutions and suggestions.

Andhra Pradesh

The recommendation for an exclusive state-specific policy for exports was submitted to the Department of Industries, Government of Andhra Pradesh. The suggestions included developing infrastructure, coastal shipping and industrial clusters and government support for pre-production and post-production activities.

The recommendations on the proposed Logistics and Warehousing policy for the state of Andhra Pradesh was made with a view to promote the state as a logistics hub to accelerate growth and employment. The recommendations included strengthening the logistics and warehousing ecosystem, development of integrated logistics parks and adoption of environment friendly practices.

Kerala

An exclusive state specific policy for exports was advocated for in Kerala, with a view to making the state a catalyst in promoting international trade in sectors such as rubber, marine, food products, spices.

Arif Mohammed Khan, Governor of Kerala inaugurating the Global Ayurveda Summit 2019 in Kerala
and ayurveda. The government was also urged to fast track work on Vizhinjam Port, for the benefit of industry located in Thiruvananthapuram and Kollam.

Modification of the Kerala Land Reforms Act to allow cultivation of crops such as pepper, cashew, oil palm and horticultural crops was also recommended. To be planted in addition to traditional crops such as tea, coffee, cardamom, rubber and cocoa, these could help farmers earn an extra income through the year.

Tamil Nadu

CII recommendations on the proposed EV Policy were accepted by the Government of Tamil Nadu. The highlights of the recommendations include road tax on motor vehicles, scrappage policy for old vehicles, ensuring GST compliance for used cars and electricity tax exemption amongst others.

The recently released Puducherry Start-up policy included several suggestions made by CII. Under this policy, as suggested by CII, a start-up cell would be set up under Puducherry’s Industry & Commerce Department and it would function as a nodal agency for implementing the policy in the state.

Telangana

Based on the CII report on Hyderabad ‘The Indian Global City in Making’, Government of Telangana formed a stakeholders’ group to implement the recommendations.

EASE OF DOING BUSINESS

During the year, CII SR specifically focused on ease of doing business efforts, both on existing industry as well as attracting new investments. These were driven through 1,476 B2B meetings and interactions with 78 local and sectoral associations across various initiatives.

The Digital Readiness Survey report and handholding services for digital transformation in collaboration with CoEs were launched during the year. The focus on Visakhapatnam was visible through the Air Quality Source Apportionment Study undertaken in partnership with CII-CESD and the approach paper on development of the city as a defence manufacturing hub shared with the Government of Andhra Pradesh, which is under active consideration. A Compendium on Water Management Best Practices adopted by various companies is also under preparation.

In addition, industry competitiveness was driven through the launch of TCM Clusters in Erode and Karur and through the launch of 5S consultancy and initiation of awards in safety in industry and safety professionals.
Forums such as the CTO Forum and CFO Forum were launched to provide platforms for ideation and mentoring.

**MSME ENGAGEMENT**

Given the significance of MSMEs to India’s economic growth, several interventions aimed at policy advocacy, enhanced competitiveness and business promotion were undertaken during the year. Through 87 MSME interventions, 525 member companies benefitted.

Efforts were directed at improving the business environment for MSMEs in the region. A Credit & Forex Facilitation Programme was launched in partnership with SBI to help bridge the financing gap for MSMEs in Hyderabad. A proposal for setting up a MSME Tool Room in Guntur, Andhra Pradesh was also submitted to the government.

CII was the partner for dissemination of technologies and commercializing CSIR knowledge base to industry in Tamil Nadu. In building an ecosystem for intellectual property generation, over 165 IPRs were facilitated, 127 professionals trained and 171 IPs protected for industry, institutions and start-ups. During an industry interaction in Bengaluru, Mr P K Das, Chairman, CBIC discussed issues and recommendations for GST and Customs. MSMEs from the region were provided international exposure through interactions with 35 FBN representatives from 19 countries.

**EDUCATION AND SKILL DEVELOPMENT**

Given the huge job mis-match in the country, the Government of India launched National Career Service (NCS) to enable aspiring youth to pursue careers in line with their aptitude. Several actions were taken during the year, to give a thrust to this critical government initiative.

Since inception, the Model Career Centre in Chennai has received a total of 80,743 walk-ins, trained 4,550 candidates and connected 1,140 companies. The MCC has created 81,848 openings and placed 25,764 candidates through 31 job fairs and 187 placement drives.

The 31st Regional Work Skill Competition, an annual competition encouraging youth in the vocational space, also demonstrated the importance of vocational jobs. The competition that saw 135 participants from 20 organizations compete in 15 trades and also for the first time had women competitors enrol under 3 trades.

**CII@125 YEARS CELEBRATIONS**

The year 2020 marks a new milestone, as CII completes 125 years of service to India and the Indian Industry. To commemorate this landmark achievement, the CII@125 years’ celebrations were launched in January 2020 in all the states in the region.

The interventions are focused on working for Indian industry’s competitiveness as a potent instrument of growth and development and to strengthen community and societal development with the partnership and support of government, industry, and other stakeholders.

The launch celebrations held in Chennai witnessed
participation of Shri Banwarilal Purohit, Governor of Tamil Nadu; Shri Edappadi K Palaniswami, Chief Minister of Tamil Nadu and CII Past Presidents Mr R J Shahaney, Mr Suresh Krishna, Mr N Kumar, Mr R Seshasayee and Ms Shobana Kamineni besides other senior members of CII SR. Going forward, several activities are planned across the region, especially in tier II and III towns, showcasing CII’s services.

MEMBERSHIP ENGAGEMENT
Continuing the thrust on membership engagement, a series of member meets were organized in the presence of CII President, Vice President, Regional Chairman and Deputy Chairman in Hyderabad, Bengaluru, Thiruvananthapuram, Madurai, Tiruchirappalli and Coimbatore. Membership engagement was given a fillip with 24 meets and 11 new member induction sessions held across the region, covering Tier II cities, besides one on one outreach meetings at member premises.

District level councils were launched in Belgaum and Mangalore. Initiatives such as manufacturing, food, ayurveda, infrastructure, tourism and hospitality and infrastructure and construction equipment were given a thrust in collaboration with 40 local and sectoral associations, impacting around 2,482 SMEs in the region. Senior CII leadership, including three past presidents, six past regional chairpersons and regional past chairs, continued to guide the regional councils and committees. The region saw 2,845 member registrations, an overall growth of 4.1% over the previous year.

ENTREPRENEURSHIP AND START-UPS
Efforts were made to create a vibrant environment for encouraging entrepreneurship in the region. The Start-upers Forum made specific recommendations towards state level start-up policies that would facilitate a conducive ecosystem and engagement. The SR Start-up initiative provided a business networking platform for budding entrepreneurs and an online webinar series on business excellence helped build capacity. These initiatives benefitted 644 start-up companies and 276 members during the year. Over 8 forums showcased start-ups across the region and 9 start-ups were showcased at the CII Start-up interventions in Bengaluru. The annual Entrepreneurs’ Award is also being planned during the year to recognize successful entrepreneurs from region.

CORPORATE SOCIAL RESPONSIBILITY
Under the CII SR Water Alliance, 40 water bodies were identified in Tamil Nadu and Karnataka for rejuvenation, of which restoration of 15 was completed. The renovation through mechanized lake restoration included removal of weeds, debris, deepening of the water body and strengthening the bunds. About 25,000 families have benefitted from the renovation and achieved a better standard of living given the community based conservation model developed for these projects.

A study to understand livelihood and living of tribal communities in the region was a step forward in their social development. The findings of the study will be released shortly. A study titled ‘Private Enterprise in South Indian States among the Social Groups: An Analysis of Ownership and their Policy Implications’ was launched in partnership with CII Indian Institute of Dalit Studies. The objective was to understand a Dalit’s point of view on issues and challenges in private enterprises and ownership, make recommendations and suggest the way forward.
An initiative was undertaken to help children from Tamil Nadu villages overcome the challenges of learning English. An after-school programme aims to improve the fluency in English speaking and reading amongst children from classes 3-8. The sessions are conducted in 20 villages of Kurinjipadi block in the Cuddalore district with the help of local village volunteers.

CII aims to create clusters of all women FPOs that can serve as a model to be replicated across the country. The first all women FPO, initiated in Cuddalore, is unique as an all women farmers’ group is promoting farm-based enterprises from production to marketing.

The regional roundtable on Affirmative Action discussed SCs and STs conditions with respect to education and employment, specifically with a focus on technical training, labour segmentation and most importantly potential to achieve development by providing a level playing field.

After Cyclone Gaja that struck in 2017, a need assessment survey was undertaken for the fishermen community at Nagapattinam district’s coastal village of Arcottthurai, to recreate livelihood opportunities. Based on the survey, a fish auction centre was constructed and net mending hall was renovated and inaugurated in 2019.

Alternate models of enterprise development and employment opportunities for the marginalized communities in settlement areas were designed over the last few years. Of the five settlement areas consisting of close to one lakh people, Perumbakkam and Pulikat were identified for the interventions. Based on the findings of the assessment, an incubation process was initiated for the identified enterprises.

Close to 260 health education programmes, conducted throughout the year, benefitted over 7,590 employees of various organizations.
Given its industrial strengths, availability of natural resources and a pool of skilled manpower, India’s western region continues to be a key contributor to the country’s economic growth. Through its 14 offices, a skill training centre and nine model career centres, CII WR worked together with industry and a multitude of stakeholders towards ensuring regional development.

ADVOCACY

Policy advocacy continued to remain at the core of CII WR engagements with the agenda being driven through sub committees, task forces, state and zonal councils. Recommendations for policy formulation and representations on various issues were shared with state governments and relevant departments across Goa, Gujarat, Maharashtra and Madhya Pradesh.

Manufacturing

CII made key recommendations to the Government of Madhya Pradesh on a number of proposed policies.

New Industrial Policy: The Government was urged to consider giving priority to state-based industry while awarding small and medium-sized government projects; lowering stamp duty charges and exemption of stamp duty for MSME and incentivizing industrial units installing solar power facility.

New Food Processing Policy: It was suggested that the government consider subsidizing the cost of transportation from industrial units to ICDs, provide marketing assistance to state based food processing units and incentivize farmers undertaking organic farming.

New Textile Policy: Introduction of area-based differential minimum wage structure, competitive power tariff for existing & new textile units, subsidy on transportation costs for textile & apparel exports were some of the inputs given on the policy.

Healthcare Sector Investment Policy: Recommendations made to the government focused on capital subsidy for...
expansion of healthcare facilities for a minimum of 50% of the existing capacity, promotion of specialty nursing courses and development of new tertiary care facilities, medical colleges and stand-alone healthcare facilities.

Infrastructure
The high-level stakeholder engagements during Connect Madhya Pradesh – Aviation & Tourism conference paved the way for the first international flight from Indore. To commemorate Air India’s Indore - Dubai flight, the Indian Postal Department issued a special cover at CII’s behest.

It was recommended that in alignment with the national guidelines, the Madhya Pradesh Power Management Company Limited (MPPMCL) may purchase inadvertent/surplus power at the Average Power Purchase Cost (APPC) rate.

Tariff-based competitive bidding (TBCB) process for intra-state transmission project development was suggested, with a view to encouraging 30-40% lower tariffs, efficient project management and delivery of tough transmission evacuation/system-strengthening projects within unprecedented timelines of 18-24 months.

To enable Goa to get better access to central government funding for minor ports development, it was suggested that a State Maritime Board be established. Acting as a single window for the sector’s development, it can become the vehicle for accelerating development of dredging activities to optimize utilization of waterways, cruise terminals and promote multi-modal logistics & coastal shipping in the State.

The Goa Industrial Development Corporation (GIDC) has not allotted a plot for logistics & warehousing since 2012. To facilitate the creation of additional warehousing properties, it was proposed that GIDC dilute its Transfer & Sublease Regulations, 2018 to allow Industrial Undertaking Units, owning plots of upto 4,000 square meters, to migrate to Service Industry Units, on payment of a fee.

Sustainable Solutions
Maharashtra: Recommendations were shared with the Maharashtra Electricity Regulatory Commission (MERC) for the proposed Solar Roof Top Policy for the state. This included the proposal to shift from Net Metering to Net Billing and also with respect to increasing the current consumption limit of 300 kWh/month for residential consumers on net-metering.

Madhya Pradesh: The state was requested to consider expanding the limitation on Roof Top Solar distribution transformer capacity from 30% to 80% for DISCOMs and up to 100% for consumers. The Madhya Pradesh Electricity Regulatory Commission retrospectively imposed Cross-Subsidy Surcharge (CSS) and Additional Surcharge (AS) on sale of power from renewable sources. Since all renewable power costs were front ended and such charges had not been considered either by investors or the regulatory commissions, it turned several power plants in the State unviable. To ensure viability of these investments, it was recommended that the CSS and AS be charged based on the plant’s date registered with NRED.

Gujarat: To promote use of solar roof-top installations by the textile sector, it was suggested that the ceiling of 50% of sanctioned load or contract demand be removed, net metering for renewables be allowed without restrictions and the current capex model be replaced with an opex model for rooftop installations.

Ease of Doing Business
To facilitate MSME growth in Madhya Pradesh, it was proposed that the stamp duty be lowered for these companies. It was also recommended that MSMEs that had already paid the duty during initial disbursement or name change be exempt from such charges.

An industry interaction with the Chief Minister of Maharashtra, Shri Uddhav Balasaheb Thackeray, was organized in Mumbai in association with the Government
of Maharashtra. In the interaction, government sought support of eminent industry captains in creating a roadmap towards building a progressive and globally competitive Maharashtra. Policy interventions on investment opportunities, strengthening infrastructure in Mumbai to make it a financial hub, agriculture & allied sectors and ease of doing business were discussed.

In Gujarat, intervention was sought in addressing the delay in transmission of shipping bills data from the customs station to DGFT, to help iron out issues related to claim of export incentives.

**ACTION**

During the year, CII strengthened its efforts at spurring the region’s growth through continuous engagement with key stakeholders. With this objective, following initiatives were driven in partnership with the state governments:

- Conversations were stimulated on how the Madhya Pradesh government could partner the industry in accelerating industrial development, creating jobs and boosting economic activity to catapult the state to the next level of growth. The Global Trade Exhibition, spread across 7,500 sq mts and Magnificent Madhya Pradesh 2019, were organized in Indore, in partnership with the Government of Madhya Pradesh. Shri Kamal Nath, the then Chief Minister of Madhya Pradesh urged industry leaders and investors to connect with the Government to explore investment opportunities

- Corporate - Start-Up Connect Series, an initiative in association with the Start-up Promotion Cell, Department of IT (DoIT) of Goa, is a platform for start-ups to meet end-user companies, potential investors, venture capitalists, mentors and the media. The focus is on mapping the state’s start-ups and incubators/accelerators, mentoring potential start-ups and creating awareness about the start-up policies. The government of Goa, being a facilitator committed full support to start-ups, while potential investors evaluated 13 start-up entrepreneurs during a pitch session

- In a highly dynamic domestic and global economic landscape, employability and skill requirement takes centerstage. In this light, delegates at the Employability and Skills Summit 2019, in Indore, interacted with Shri Jeetu Patwari, the then Minister of Higher Education, Sports & Youth Affairs, Government of Madhya Pradesh on these challenges. The state government plans to establish a Skill University in Indore in 2020

- Parmanu Expo 2019, organized in association with Department of Atomic Energy (DAE) in Mumbai helped create awareness about the technologies related to food security, health care, waste management, environment, radioisotopes and engineering, developed by the Department. DAE
also showcased their products to the delegates at the Technology Expo. EDUCON 2019, held in Ahmedabad, focused on building a conducive environment for innovation and lifelong learning. Shri Bhupendrasinh Chudasama, Minister of Education and Law, Government of Gujarat, shared his views on importance of capacity building, fostering innovation, nurturing leadership, industry-academia linkage and skill based education.

- Business opportunities for shipbuilding & defence related sectors were highlighted by Chief Minister of Goa, Dr Pramod Sawant at the CII-GSL: Business Partners Meet 2019 in Goa. While the meet offered a market place for Goa Shipyard Limited (GSL) to conduct business, it was also a platform for strengthening ancillary industry, promoting and understanding these sectors.
- Emerging opportunities in logistics and details of the Sagarmala Programme, a port led development initiative were highlighted by Shri Michael Lobo, Minister of Ports, Government of Goa and Shri Mauvin Godinho, Minister of Transport, Government of Goa at the 5th edition of the Logistics Conference.

**Sector Focus**

- The 5th edition of MSME Summit, held in Nagpur, was a platform for MSMEs to engage with global players to explore how they could integrate into the global market. The discussions focused on empowering MSMEs to achieve the USD 5 trillion economy, building MSME competitiveness through adoption of advanced technologies, seamless credit access and jumpstarting exports. Shri Nitin Gadkari, Minister of Road Transport & Highways and MSME urged the MSMEs to step up their contribution to the GDP to 50% from the current 29%.
- With a view to promoting competitiveness to win global markets enabling India to thrive in a VUCA world, CII organized the 17th edition of CII Manufacturing Summit in Mumbai. Strategies to nurture and position India as a factory to the world and the opportunities arising from the Fourth Industrial Revolution were brought forth by industry leaders. Policy reforms, start-ups & sunrise sectors, and green manufacturing practices were emphasized as being key to boosting exports and achieving significant manufacturing growth.
- With an objective to improve competitiveness of India’s agriculture sector and promote inclusive growth across the agriculture value chain, the Krishi
Sangam - Innovative Farmers Meet was organized in Gujarat. The meet addressed the issues of the farming community, created awareness about means to enhance productivity, and highlighted practices to achieve the aim of doubling farmers income by 2022. Successful farmers from the state, who were felicitated during the meet, narrated their success stories.

International Engagement
Throughout the year, CII WR promoted international cooperation by creating platforms for industry leaders to network with heads of states, ministers, government officials and diplomats. Some key dignitaries that CII engaged with included the royal couple of The Netherlands as well as that of Sweden, Deputy Prime Ministers of Russia and Thailand and Ministers from Thailand & Singapore. The relationship with USA was strengthened through interactions with Governors of Arkansas, Colorado and Indiana and a US Congressional Delegation. Diplomats from Bosnia & Herzegovina, Canada, Ecuador, Great Britain, Italy, Netherlands, Oman, South Korea South Africa, and Vietnam interacted with Indian industry on various occasions.

At the annual reception for Consul Generals and Heads of Diplomatic Missions hosted in Mumbai, participants from 24 countries explored business opportunities. The region also facilitated a series of seminars, forums, roundtable discussions and B2B meetings for delegations from countries such as Australia, Canada, China, European Union, Germany, Italy, Netherlands, Russia, Singapore, South Korea, Sweden, Spain, South Africa, Thailand, UK, USA and Vietnam.

Building Competitiveness
CII’s vision of competitiveness building across stakeholders, was given a thrust through a slew of training sessions, conclaves and seminars.

The four state offices and four zonal chapters of the CII WR Indian Women Network (IWN) focused on key issues such as health & wellness, safety and social media enhancement. Opportunities were created for members to attend programmes on leadership and rural entrepreneurship development. The 4th edition of WomeNation aimed at encouraging women to go beyond boundaries.

The 3rd edition of the Leadership Conclave, held in Indore recognized the power and achievements of leaders in the presence of Shri Kamal Nath. Leaders from diverse sectors, who are pioneers in their segments, deliberated on the need for businesses to analyze and understand technology advancements.
MEMBERSHIP SERVICES
CII's MEMBERSHIP ENGAGEMENT IN 2019

Region-Wise Classification
- Southern Region: 2869 (31%)
- Western Region: 2141 (23%)
- Northern Region: 1086 (12%)
- Eastern Region: 125 (1%)

Scale-Wise Classification
- Small: 1953 (21%)
- Medium: 1534 (16%)
- Large: 4719 (51%)
- Institutions and Associations: 1119 (12%)

Type-Wise Classification
- Associate Members: 823
- Affiliate Associations: 295
- Institutional Members: 16
- Primary Members: 8191
Membership Growth

Top States

Top Zones

Mumbai 600 570
Chennai 502 502
Bengaluru 461 461
Pune 333 333
Coimbatore 271 271
Gurugram 257 257
Ahmedabad 206 206
Vasakhpuram 181 181
Ludhiana 134 134
Malwa 129 129
Central Gujarat 128 128
Madurai 120 120

Tamil Nadu 8000 9325
Maharashtra 7170 8919
Delhi 7419 8831
Karnataka 6004 8414
Gujarat 538 7920
West Bengal 503 7019
Haryana 419 7273
Uttar Pradesh 354 7459
Rajasthan 338 7920
Punjab 337 8414
Andhra Pradesh 304 9051

MEMBERSHIP ENGAGEMENT

Membership services are very important for the overall CII agenda. Over the years, CII Membership Council has evolved a wide-ranging portfolio of services, based on continuous dialogue and feedback, tailored to the needs of members. During 2019, existing and new services continued to be offered to members. These included mentorship programmes, directory of members, redemption of reward points, a comprehensive booklet on membership services, B2B meetings and webinars, amongst others. The focus remained on strengthening the outreach and membership engagement, through a series of initiatives and services.

• The outreach initiative gathered momentum with 3,703 member companies being met at their premises
• Membership engagement was driven through 83 members’ meets attended by 2,753 members across 60 locations
• The 56 new member induction sessions helped 751 new members across 45 locations understand and better utilize CII services
• Membership growth was given a thrust in 65 locations through 90 roadshows attended by 2,967 participants
• A total of 1,222 new members joined CII during the year
• 177 senior members including National Office-bearers, Past Presidents and Chairmen volunteered to mentor new members and guide, counsel and advise them on CII services & its activities
• Membership issue tracker, compiled by zones, states and regions, highlighted 236 concerns that are being addressed.

Networking Facilitation
MyCII continued to facilitate business networking through an online B2B meeting platform that hosted and brought together delegates, exhibitors, sponsors

From L to R: Raju Shah, Chairman, CII Gujarat State Council and Chairman, Harsha Engineers Ltd; Vikram Kirloskar, President, CII and Chairman & MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor and Piruz Khambatta, Chairman and MD, Rasna Pvt Ltd and Virendra Gupta, Deputy Director General, CII at the Members’ Meet in Ahmedabad
and other stakeholders. During the year, this platform facilitated over 15,000 B2B meetings between domestic and international delegates in conferences and seminars. MyCII users had access to online group discussions and networking with members of other online groups and communities.

**Industry Insights Series**

The Industry Insights Series, a new value-added and knowledge-based service, was launched towards strengthening the Indian industry. The series is designed to serve as a digital knowledge and networking platform, under which leading businesses are invited to speak on how their organizations are addressing critical issues facing the industry. The aim is to facilitate both knowledge sharing as well as networking between participants, using the online medium. During the year, 15 sessions under the Industry Insight Series were conducted, with participation crossing over 5,000.
SOCIAL MEDIA OUTREACH

KEY PERFORMANCE INDICATORS

- **Total Followers** in April, 2020: 5,58,888
- **Gained Followers**: 1,76,000
- **Engaged People**: 10.5 Million
- **Earned Impressions**: 162 Million
- **Engaged Engagements**: 72,000

OUTREACH THROUGH CII EVENTS

CII Annual Report 2019-20

CII Annual Report 2019-20
### Councils / Committees / Task Forces for 2019-20

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<th>Councils / Committees / Task Forces</th>
<th>Chair / Co-chair for 2019-20</th>
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| Agriculture Council                | Chair: Mr Salil Singhal  
Chairman - Emeritus, PI Industries  
Co-chair: Mr B Thiagarajan  
MD, Blue Star |
| Allied Sectors in Agriculture - Dairy, Poultry & Fisheries Committee | Chair: Mr Arabind Das  
Chief Operating Officer  
Godrej Tyson Foods  
Co-Chair: Mr Atul Mehra  
Chairman & Director  
Tasty Dairy Specialties |
| Aspirational District Development Committee | Chair: Mr Sudhir Deoras  
Former Advisor  
TRF |
| Associations Council (ASCON) | Chair: Mr T V Narendran  
CEO & MD, Tata Steel |
| Banking Committee | Chair: Dr Rajiv Lall  
Non-Executive Chairman, IDFC First Bank |
| Biotechnology Committee | Chair: Dr Rajesh Jain  
MD, Panacea Biotech  
Co-chair: Mr Suresh Jadhav  
Executive Director  
Serum Institute of India |
| Capital Goods & Engineering Committee | Chair: Dr Nalin Shinghal  
Chairman & MD, BHEL  
Co-chair: Mr Ravi Raghavan  
MD & CEO, Bharat Fritz Werner |
| Chemicals Committee | Chair: Mr Ashish Bharat Ram  
MD & CEO, SRF |
| CII AI Forum | Chair: Mr S Gopalakrishnan  
Co-Founder, Infosys & Chairman  
Axilor Ventures  
Co-chair: Mr Rajan Navani  
Vice Chairman & MD, Jetline Industries |
| CII Arbitration Centre and Arbitration Committee | Chair: Mr Shardul S Shroff  
Executive Chairman  
Shardul Amarchand Mangaldas & Co |
| Civil Aviation Committee | Chair: Mr Ajay Singh  
Chairman & MD, Spice Jet  
Co-chair: Ms Tulsí N Mirchandaney  
MD, Blue Dart Aviation |
| Climate Change Council | Chair: Mr Jamshyd N Godrej  
Chairman & MD, Godrej & Boyce  
Co-chair: Mr Sunant Sinha  
Chairman & MD, ReNew Power |
| Committee for CFOs | Chair: Mr Ramesh Subramanyam  
Chief Financial Officer, Tata Power |
| Construction Committee | Chair: Mr Atul Punj  
Chairman, Punj Lloyd |
| Corporate Governance Council | Chair: Mr Keki Mistry  
Vice Chairman & CEO, Housing Development Finance Corporation (HDFC) |
| CSR Committee | Chair: Dr Raghupati Singhania  
Chairman & MD, JK Tyre & Industries  
Co-chair: Ms Rumjhum Chatterjee  
Group MD, Feedback Infra |
| Defence Committee | Chair: Mr Baba N Kalyani  
Chairman & MD, Bharat Forge  
Co-chair: Mr M V Gowtama  
Chairman & MD, Bharat Electronics |
| Design Committee | Chair: Mr Deep Kapuria  
Chairman, The Hi-Tech Group |
| eCommerce Committee | Chair: Mr Ritesh Agarwal  
Founder & CEO, Oravel Stays (OYO)  
Co-chair: Mr Abhiraj Singh Bhal  
Co-Founder & CEO  
Urban Clap Technologies |
| Economic Affairs Council | Chair: Mr Uday Kotak  
MD & CEO, Kotak Mahindra Bank Ltd  
Co-chair: Dr Naushad Forbes  
Co-Chairman, Forbes Marshall |
| Education Council | Chair: Mr Sunil Kant Munjal  
Chairman, Hero Enterprise  
Co-chair: Mr BVR Mohan Reddy  
Executive Chairman, Cyient |
| Electric Mobility and Battery Storage Committee | Chair: Mr Rajan Wadhera  
President - Automotive Sector  
Mahindra & Mahindra  
Co-chairs:  
1. Mr Raman C V  
Senior Executive Director (Engg)  
Maruti Suzuki  
2. Mr Saurabh Kumar  
MD, Energy Efficiency Services |
| Environment Committee | Chair: Mr R Mukundan  
MD, Tata Chemicals |
| EXIM Committee | Chair: Mr Sanjay Budhia  
MD, Patton International  
Co-chair: Mr Narayan Sethuraman  
MD, Sanmar Matrix Metals |
| FBN India Chapter Council | Chair: Mr Ajay S Shriram  
Chairman & Senior MD, DCM Shriram |
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| **Financial Inclusion and Digitization Committee** | Chair: Dr Janmejaya Sinha  
Chairman - India, BCG India  
Co-chairs:  
1. Mr Ajay Kaushal  
Co-Founder & Director, Indiaideas.com  
2. Mr Ramesh Iyer  
Vice Chairman & MD, Mahindra Finance | **Indian Women Network (IWN) & Women Empowerment Committee** | Chair: Ms Bhairavi Jani  
Executive Director, SCA Group  
Co-chair: Ms Vaishali Nigam Sinha  
Chief Sustainability, CSR and Communications Officer, ReNew Power |
| **Financial Markets Committee** | Chair: Mr Nilesh Shah  
MD, Kotak Mahindra Asset Management Co  
Co-chair: Mr Vishal Kampani  
MD, JM Financial | **Industrial Relations Committee** | Chair: Mr M S Unnikrishnan  
MD & CEO, Thermax |
| **Financial Sector Development Council** | Chair: Mr Nimesh N Kampani  
Chairman, JM Financial Group | **Infrastructure Council** | Chair: Mr Vinayak Chatterjee  
Chairman, Feedback Infra  
Co-chair: Mr Anil Sardana  
MD & CEO, Adani Transmission |
| **FMCG Committee** | Chair: Mr Bharat Puri  
MD, Pidilite Industries  
Co-Chair: Mr Vivek Gambhir  
MD & CEO, Godrej Consumer Products | **Insurance & Pensions Committee** | Chair: Mr Sanjiv Bajaj  
MD & CEO, Bajaj Finserv  
Co-chairs:  
1. Ms R M Vishakha  
MD & CEO, IndiaFrist Life Insurance  
2. Mr Mahesh Balasubramanian  
MD & CEO, Kotak Mahindra General Insurance Co. |
| **Food Processing Committee** | Chair: Mr Suresh Narayanan  
Chairman & MD, Nestle India  
Co-chairs:  
1. Mr Sudhir Sitapati  
Executive Director - Food & Refreshments, Hindustan Unilever  
2. Mr Arvind Mediratta  
MD & CEO, Metro Cash & Carry | **Intellectual Property Rights Committee** | Chair: Mr Arvind Thakur  
Senior Advisor to the Board  
NIIT Technologies  
Co-chair: Mr Ramesh Datla  
Chairman & MD, Elico |
| **Footwear and Leather Accessories** | Chair: Mr Adesh Gupta  
CEO & Executive Director, Liberty Shoes | **International Council** | Chair: Dr Naushad Forbes  
Co-Chairman, Forbes Marshall |
| **Future Businesses Group** | Chair: Mr Rajan Navani  
Vice Chairman & MD, Jetline Industries  
Co-chair: Mr Anuj Kapuria  
CEO, The Hi-Tech Robotic Systemz | **International Trade & Trade Policy Committee** | Chair: Mr R Seshasayee  
Vice Chairman, Hinduja Group  
Co-chair: Mr Deep Kapuria  
Chairman, The Hi-Tech Gears |
| **Health Insurance Committee** | Chair: Dr Naresh Trehan  
Chairman & MD, Medanta - The Medicity | **IT & ITeS Committee** | Chair: Mr Anant Maheshwari  
President, Microsoft Corporation India |
| **Heatlhcare Council** | Chair: Mr Sashi Mukundan  
Region President and Head of Country - India, BP Exploration (Alpha)  
Co-chair: Mr Nitin Prasad, Chairman  
Shell Group of Companies in India | **Leadership & HR Committee** | Chair: Mr Sanjay Behl  
Chief Executive Officer, Raymond |
| **Hydrocarbons Committee** | Chair: Mr Vinod Sharma  
MD, Deki Electronics  
Co-chairs:  
1. Mr Sunil Vachani  
Chairman, Dixon Technologies (I)  
2. Mr Inderdeep Singh  
President & MD  
Continental Device India | **Make in India - Renewables Committee** | Chair: Mr Tulsi Tanti  
Chairman & MD, Suzlon Energy |
| **ICTE Manufacturing Committee** | Chair: Mr Rajan Navani  
Vice Chairman & MD, Jetline Industries  
Co-chair: Ms Bhairavi Jani  
Executive Director, SCA Group | **Manufacturing Council** | Chair: Dr Pawan Goenka  
MD, Mahindra & Mahindra |
| **India@75 Council** | Chair: Mr Sanjay Behl  
Chief Executive Officer, Microsoft Corporation India  
Co-chair: Mr Deep Kapuria  
Chairman, The Hi-Tech Gears | **Media & Entertainment Committee** | Chair: Mr Sudhanshu Vats, Former  
Group CEO & MD, Viacom 18 Media  
Co-chair: Ms Jagi Panda  
MD, Ortel Communication |
| **India@75 Council** | Chair: Mr Sashi Mukundan  
Region President and Head of Country - India, BP Exploration (Alpha)  
Co-chair: Mr Nitin Prasad, Chairman  
Shell Group of Companies in India | **Membership Council** | Chair: Mr T V Narendran  
CEO & MD, Tata Steel |
| **International Trade & Trade Policy Committee** | Chair: Mr Naresh Trehan  
Chairman & MD, Medanta - The Medicity | **Mining Committee** | Chair: Mr Sunil Duggal  
CEO & Wholetime Director  
Hindustan Zinc |
| **International Trade & Trade Policy Committee** | Chair: Mr Sashi Mukundan  
Region President and Head of Country - India, BP Exploration (Alpha)  
Co-chair: Mr Nitin Prasad, Chairman  
Shell Group of Companies in India | **MNCs Committee** | Chair: Sanjiv Mehta  
CEO & MD, Hindustan Unilever Ltd |
| **International Trade & Trade Policy Committee** | Chair: Mr Sashi Mukundan  
Region President and Head of Country - India, BP Exploration (Alpha)  
Co-chair: Mr Nitin Prasad, Chairman  
Shell Group of Companies in India | **MSME Council** | Chair: Mr Shreekant Somany  
Chairman & MD, Somany Ceramics  
Co-chairs:  
1. Mr Ashok Saigal  
MD, Frontier Technologies  
2. Mr Mahesh Desai  
Chairman, Meera Group |
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<td>National Initiative on Cleaner Air, Better Life</td>
<td>Chair: Mr Nitin Prasad, Chairman Shell Group of Companies in India  Co-chair: Mr T P Chopra CEO, Bharat Light &amp; Power</td>
</tr>
<tr>
<td>NBFCs Committee</td>
<td>Chair: Mr Ajay Srivinavan Chief Executive, Aditya Birla Capital Co Chair: Mr Abhimanyu Munjal Joint MD &amp; CEO, Hero FinCorp</td>
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<tr>
<td>North East Council</td>
<td>Chair: Mr S K Barua MD, Numaligarh Refinery Co-chair: Mr Abhijit Barooah MD, Premier Cryogenics</td>
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<tr>
<td>Nutrition Committee</td>
<td>Chair: Ms Vinita Bali Former Chair Global Alliance for Improved Nutrition</td>
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<tr>
<td>Pharma Committee</td>
<td>Chair: Mr G V Prasad Co-chairman &amp; CEO Dr Reddy's Laboratories</td>
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<tr>
<td>Power Committee</td>
<td>Co-chairs: 1. Mr Rajiv Ranjan Mishra MD, CLP India 2. Mr Praveer Sinha CEO &amp; MD, The Tata Power Co</td>
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<tr>
<td>Private Equity &amp; Venture Capital Committee</td>
<td>Chair: Mr Sanjay Nayar CEO, KKR India Advisors Co-chair: Mr Rajesh Srivastava Chairman &amp; MD, Rabo Equity Advisors</td>
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<tr>
<td>Public Policy Council</td>
<td>Chair: Mr Subodh Bhargava Past President, CII</td>
</tr>
<tr>
<td>Public Sector Enterprises Council</td>
<td>Chair: Mr V Kalyana Rama Chairman &amp; MD Container Corporation of India Co-chair: Mr Sanjiv Sharma Executive Director (CP&amp;ES) Indian Oil Corporation</td>
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<tr>
<td>Railways Committee</td>
<td>Co-chairs: 1. Mr. Sachin Bhanushali CEO &amp; Whole Time Director, Gateway Rail Freight 2. Mr Sudhir Rao MD, Bombardier Transportation</td>
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<tr>
<td>Real Estate &amp; Housing Committee</td>
<td>Co-chairs: 1. Mr Anshuman Magazine Chairman &amp; CEO - India, South East Asia, Middle East and Africa, CBRE 2. Mr Neel C Raheja Group President, K Raheja Group</td>
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<tr>
<td>Regulatory Affairs Committee</td>
<td>Chair: Ms Zia Mody Senior Partner, AZB &amp; Partners</td>
</tr>
<tr>
<td>Renewable Energy Council</td>
<td>Chair: Mr. Sumant Sinha Chairman &amp; MD, ReNew Power Co-chair: Mr Rahul Munjal MD, Hero Future Energies</td>
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<tr>
<td>Retail Committee</td>
<td>Chair: Mr. Shashwat Goenka Sector Head (Retail), RP-Sanjiv Goenka Group Co-chair: Ms, Preet Dhpur Chief Financial Officer, IKEA India</td>
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<tr>
<td>Services Council</td>
<td>Chair: Ms Shobana Kamineni Executive Vice Chairperson, Apollo Hospitals Enterprise</td>
</tr>
<tr>
<td>Shipping and Logistics Committee</td>
<td>Chair: Mr R Dinesh, Joint MD TV Sundaram Iyengar &amp; Sons Co-chairs: 1. Mr Bharat Joshi MD, Associated Container Terminals 2. Mr Sandeep Barasia MD &amp; CBO, Delhivery</td>
</tr>
<tr>
<td>Shipping and Ports Committee</td>
<td>Chair: Mr Rizwan Soomar CEO &amp; MD, Hindustan Ports Co-chair: Mr Karan Adani CEO, Adani Ports &amp; SEZ</td>
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<tr>
<td>Skill Development &amp; Livelihood Committee</td>
<td>Chair: Mr Arun Nanda, Chairman Mahindra Holidays &amp; Resorts India Co-chairs: 1. Mr Soumitra Bhattacharya MD, Bosch India 2. Ms Sarita Reddy MD, Gayatri Sugars</td>
</tr>
<tr>
<td>Smart Manufacturing Council</td>
<td>Chair: Mr Sunil Mathur MD &amp; CEO, Siemens Co-chair: Mr Sunjay Kapur Chairman, Sonata Comstar</td>
</tr>
<tr>
<td>Space Committee</td>
<td>Chair: Mr Rakesh Sasibhushan Chairman &amp; MD, Antrix Corporation Co-chair: Mr Gopal Agarwal Deputy MD, Bharat Forge</td>
</tr>
<tr>
<td>Special Abilities Committee</td>
<td>Chair: Mr Piruz Khambatta Chairman, Rasna</td>
</tr>
<tr>
<td>Sports Committee</td>
<td>Chair: Sanjay Gupta (December 2019)</td>
</tr>
<tr>
<td>Start-up Council</td>
<td>Chair: Mr S Gopalakrishnan Co-Founder, Infosys &amp; Chairman, Axilor Ventures Co-chairs: 1. Mr Nalin Kohli Chairman &amp; CEO, Araine Enterprises 2. Mr Sudhir Mehta Chairman &amp; MD, Pinnacle Industries</td>
</tr>
<tr>
<td>Steel Committee</td>
<td>Chair: Mr Seshagiri Rao Joint MD &amp; Group CFO, JSW Steel Co-chairs: 1. Mr Sachit Jain, Vice Chairman &amp; MD Vardhaman Special Steels 2. Mr Koushik Chatterjee Executive Director &amp; CFO, Tata Steel Ltd</td>
</tr>
<tr>
<td>Taxation Committee</td>
<td>Chair: Mr Rajiv Memani Chairman - India Region &amp; Emerging Markets Committee, Ernst &amp; Young LLP</td>
</tr>
<tr>
<td>Councils / Committees / Task Forces</td>
<td>Chair / Co-chair for 2019-20</td>
</tr>
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<tr>
<td><strong>TCM Committee</strong></td>
<td>Chair: Mr Seshagiri Rao</td>
</tr>
<tr>
<td></td>
<td>Joint MD &amp; Group CFO</td>
</tr>
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<td></td>
<td>JSW Steel</td>
</tr>
<tr>
<td></td>
<td>Co-chair: Mr Kamal Bali</td>
</tr>
<tr>
<td></td>
<td>President &amp; MD, Volvo India</td>
</tr>
<tr>
<td><strong>Technology and R&amp;D Committee</strong></td>
<td>Chair: Mr Rajan Wadhera</td>
</tr>
<tr>
<td></td>
<td>President - Automotive Sector</td>
</tr>
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<td></td>
<td>Mahindra &amp; Mahindra</td>
</tr>
<tr>
<td><strong>Telecom and Broadband Committee</strong></td>
<td>Chair: Mr Kiran Karnik</td>
</tr>
<tr>
<td></td>
<td>Former President, NASSCOM</td>
</tr>
<tr>
<td></td>
<td>Co-chair: Dr Anand Agarwal</td>
</tr>
<tr>
<td></td>
<td>Group CEO, Sterlite Technologies</td>
</tr>
<tr>
<td><strong>Textiles and Apparels Committee</strong></td>
<td>Chair: Mr Dilip Gaur</td>
</tr>
<tr>
<td></td>
<td>MD (Pulp &amp; Fibre Business)</td>
</tr>
<tr>
<td></td>
<td>Grasim Industries</td>
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<tr>
<td></td>
<td>Co-chair: Mr Kulin Lalbhai</td>
</tr>
<tr>
<td></td>
<td>Executive Director, Arvind</td>
</tr>
<tr>
<td><strong>Tourism &amp; Hospitality Committee</strong></td>
<td>Chair: Mr Dipak Haksar</td>
</tr>
<tr>
<td></td>
<td>Former Chief Executive, ITC Hotels</td>
</tr>
<tr>
<td></td>
<td>Co-chairs:</td>
</tr>
<tr>
<td></td>
<td>1. Mr Arjun Sharma</td>
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<tr>
<td></td>
<td>Chairman, Select Group</td>
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<td></td>
<td>2. Mr Ritesh Aggarwal</td>
</tr>
<tr>
<td></td>
<td>Founder and CEO, Oravel Stays</td>
</tr>
<tr>
<td><strong>Trade Fairs Council</strong></td>
<td>Chair: Mr Vipin Sondhi</td>
</tr>
<tr>
<td></td>
<td>MD &amp; CEO, Ashok Leyland</td>
</tr>
<tr>
<td><strong>Urban Development and Smart Cities Council</strong></td>
<td>Co-chairs:</td>
</tr>
<tr>
<td></td>
<td>1. Ms Sangeeta Prasad</td>
</tr>
<tr>
<td></td>
<td>MD &amp; CEO</td>
</tr>
<tr>
<td></td>
<td>Mahindra Lifespace Developers</td>
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<tr>
<td></td>
<td>2. Mr Amit Gossain</td>
</tr>
<tr>
<td></td>
<td>MD, Kone Elevator India</td>
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<tr>
<td><strong>Water Committee</strong></td>
<td>Chair: Dr Ramesh Datla</td>
</tr>
<tr>
<td></td>
<td>Chairman &amp; MD, Elico</td>
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<tr>
<td></td>
<td>Co-chair: Mr N K Ranganath</td>
</tr>
<tr>
<td></td>
<td>Area MD, Grundfos Pumps (I)</td>
</tr>
<tr>
<td><strong>Working Group on Population and Development</strong></td>
<td>Chair: Mr Sandipan Chakravortty</td>
</tr>
<tr>
<td></td>
<td>Former Chairman Tata Martrade</td>
</tr>
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<td></td>
<td>International Logistics</td>
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<table>
<thead>
<tr>
<th>TASK FORCES</th>
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<tbody>
<tr>
<td><strong>Task Force on Affirmative Action</strong></td>
<td>Chair: Mr Farhad Forbes</td>
</tr>
<tr>
<td></td>
<td>Co-Chairman, Forbes Marshall</td>
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<td></td>
<td>Co-Chair: Mr Milind Kamble</td>
</tr>
<tr>
<td></td>
<td>Chairman, Dalit Indian Chamber of Commerce and Industry</td>
</tr>
<tr>
<td><strong>Task Force on Arts and Crafts</strong></td>
<td>Chair: Mrs Tarana Sawhney</td>
</tr>
<tr>
<td></td>
<td>Member of the Advisory Board,</td>
</tr>
<tr>
<td></td>
<td>Foundation for Indian Contemporary Art</td>
</tr>
<tr>
<td><strong>Task force on Bio-Energy</strong></td>
<td>Chair: Mr Pramod Chaudhari</td>
</tr>
<tr>
<td></td>
<td>Executive Chairman, Praj Industries</td>
</tr>
<tr>
<td></td>
<td>Co-chair: Mr G S Krishnan</td>
</tr>
<tr>
<td></td>
<td>Advisor, Novozymes South Asia</td>
</tr>
<tr>
<td><strong>Task Force on CII University</strong></td>
<td>Chair: Dr Naushad Forbes</td>
</tr>
<tr>
<td></td>
<td>Co-Chairman, Forbes Marshall</td>
</tr>
<tr>
<td><strong>Task Force on Ease of Doing Business</strong></td>
<td>Chair: Mr Piruz Khambatta</td>
</tr>
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<td>Chairman, Rasna</td>
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<td></td>
<td>Co-chair: Mr Milan Nag</td>
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<td></td>
<td>Chairman &amp; MD, K K Nag</td>
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<table>
<thead>
<tr>
<th>Councils / Committees / Task Forces</th>
<th>Chair / Co-chair for 2019-20</th>
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<tbody>
<tr>
<td><strong>Task Force on Judicial Reforms</strong></td>
<td>Chair: Mr Ajay Bahl</td>
</tr>
<tr>
<td></td>
<td>Joint MD &amp; Managing Partner</td>
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<td></td>
<td>AZB &amp; Partners</td>
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<tr>
<td><strong>Task Force on Legal Services</strong></td>
<td>Chair: Mr Lalit Bhasin</td>
</tr>
<tr>
<td></td>
<td>Managing Partner, Bhasin &amp; Co.</td>
</tr>
<tr>
<td><strong>Task Force on Post Harvest and Logistics</strong></td>
<td>Chair: Mr Ravichandran Purushothaman</td>
</tr>
<tr>
<td></td>
<td>President - India Region, Danfoss Industries</td>
</tr>
<tr>
<td><strong>Task Force on Sugar</strong></td>
<td>Chair: Mr Tarun Sawhney</td>
</tr>
<tr>
<td></td>
<td>Vice Chairman &amp; MD, Triveni Engineering &amp; Industries</td>
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<tr>
<td><strong>Task Force on Wind Energy</strong></td>
<td>Chair: Mr Ramesh Kymal</td>
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<td>Chairman &amp; MD, Siemens Gamesa Renew Power</td>
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<tr>
<th>CENTRES OF EXCELLENCE</th>
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<tr>
<td>CII-Institute of Logistics Advisory Council</td>
<td>Chair: Mr R Dinesh</td>
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<td></td>
<td>Joint MD, T V Sundram iyengar &amp; Sons</td>
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<tr>
<td>CII-Institute of Quality Advisory Council</td>
<td>Chair: Mr R Mukundan</td>
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<td></td>
<td>MD, Tata Chemicals</td>
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<tr>
<td>CII-ITC Centre of Excellence for Sustainable Development Advisory Council</td>
<td>Chair: Mr Sanjiv Puri</td>
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<td>Chairman &amp; MD, ITC</td>
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<tr>
<td>CII Centre of Excellence for Competitiveness for SMEs Advisory Council</td>
<td>Chair: Mr Shreekant Somany</td>
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<td>Chairman &amp; MD, Somany Ceramics</td>
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<tr>
<td>CII - Naoroji Godrej Centre of Manufacturing Excellence Advisory Council</td>
<td>Chair: Mr Jamshyd N Godrej</td>
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<td>Chairman &amp; MD, Godrej &amp; Boyce</td>
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<tr>
<td>CII - Sohrabji Godrej Green Business Centre Advisory Council</td>
<td>Chair: Mr Jamshyd N Godrej</td>
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<td>Chairman &amp; MD, Godrej &amp; Boyce</td>
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<tr>
<td>CII-Suresh Neotia Centre of Excellence for Leadership Advisory Council</td>
<td>Chair: Mr Harshavardhan Neotia</td>
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<td>Chairman, Ambuja Neotia Holdings</td>
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<tr>
<td>CII - Triveni Water Institute Advisory Council</td>
<td>Chair: Mr Dhruv M Sawhney</td>
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<td>Chairman &amp; MD, Triveni Turbine</td>
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<tr>
<td>CII - Jubilant Bhartia Food and Agriculture Centre of Excellence Advisory Council</td>
<td>Chair: Mr Hari S Bhartia</td>
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<tr>
<td></td>
<td>Co-Chairman &amp; MD, Jubilant Life Sciences</td>
</tr>
</tbody>
</table>
## CII NETWORK

### CII HEADQUARTER
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Website: www.cii.in

### CORPORATE OFFICES
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**New Delhi**  
India Habitat Centre  
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New Delhi-110003  
Tel: 011-24682230-35, 41504514-19

**New Delhi**  
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Lodi Road  
New Delhi-110003

**New Delhi**  
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Second Floor, Thapar House  
124, Janpath  
New Delhi-110001  
Tel: 011-41502301-02

**Gurugram**  
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Gurugram-122015  
Tel: 0124-4014060-67

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Website: www.cii-twii.in

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Website: www.cii-competitiveness.in

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Website: www.cii-leadership.in
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Directorate of Commerce & Industries
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Siliguri, Dist. Darjeeling
Tel: 033-2511766/8967374645
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Email: rupa.das@cii.in

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Patna-800001
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Email: ciblore@cii.in

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Email: cii.kerala@cii.in
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C/O S B Resellers Pvt Ltd
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Near Basant Bahar Theater
Kolhapur-416001
Tel: 0231-2658297
Email: chairman.southmaharashtra@cii.in

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C/O Mahindra Plant Head’s
PS Mr Karthick Vignesh, Mahindra & Mahindra Ltd.
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Email: cii.nagpur@cii.in

Nashik
“Sahakar Sampada”
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Nashik-220007
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Pune-411005
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Email: ciipune@cii.in

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Rajkot-360001
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C/O Detox Group
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Email: cii.surat@cii.in

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Near Akshar Chowk, Old Padra Road
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Salem
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Thiruvananthapuram-695003
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Arlington, VA 22209
Tel: +1 703 807 0310
Mobile: + 1 571 232 7170
Email: shuchita.sonalika@cii.in
The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895 and celebrating 125 years in 2020, India's premier business association has more than 9100 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 291 national and regional sectoral industry bodies.

CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, healthcare, education, livelihood, diversity management, skill development, empowerment of women, and water, to name a few.

India is now set to become a US$ 5 trillion economy in the next five years and Indian industry will remain the principal growth engine for achieving this target. With the theme for 2019-20 as ‘Competitiveness of India Inc – India@75: Forging Ahead’, CII will focus on five priority areas which would enable the country to stay on a solid growth track. These are – employment generation, rural urban connect, energy security, environmental sustainability and governance.

With 68 offices, including 9 Centres of Excellence, in India, and 11 overseas offices in Australia, China, Egypt, France, Germany, Indonesia, Singapore, South Africa, UAE, UK, and USA, as well as institutional partnerships with 394 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.