



Confederation of Indian Industry

INDIA RISE

ANNUAL REPORT 2018-19

RESPONSIBLE | INCLUSIVE | SUSTAINABLE | ENTREPRENEURIAL





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INDIA RISE 
ANNUAL REPORT 2018-19

The main title 'INDIA RISE' is written in a large, blue, sans-serif font. To the right of the word 'RISE' is a decorative graphic element consisting of three overlapping, right-angled shapes in shades of blue and purple. Below the main title, the text 'ANNUAL REPORT 2018-19' is written in a smaller, bold, black, sans-serif font.



Mr Rakesh Bharti Mittal
President, CII

PRESIDENT'S REVIEW

LOOKING BACK

The year gone by was an action-packed year as we sought to figure out multiple sources of volatility in the global and Indian economic environment. Within this, our strong policy advocacy and multifaceted activities gained momentum at the National and State-levels, to ensure positive outcomes for Indian Industry.

India cemented its position as the fastest growing major economy in the world, with an expected growth of 7% for 2018-19, with stable macroeconomic indicators and continued reforms. However, challenges relating to performance of agriculture, private investments, and poverty alleviation remain. Industry's role as a responsible partner in development is central to our overall progress as a nation.

As we approach India@75 in 2022, CII's vision of an India of economic strength, technological vitality, moral leadership and inclusive growth was taken forward with the theme of 'India RISE: Responsible. Inclusive. Sustainable. Entrepreneurial.'

I am happy to report progress on these key areas. CII's policy recommendations helped promote entrepreneurship and investment, working on issues such as liquidity crunch, rupee volatility, fluctuating oil prices and others. We presented detailed inputs on kick-starting the credit cycle, reinvigorating MSMEs, and the key sectors of agriculture, manufacturing, services and infrastructure. Needless to say, this was a year of continuous engagement with Government, including the Prime Minister, various ministers, and senior officials. We celebrated India's remarkable performance in Ease of Doing Business rankings to reach 77th rank in the 2019 World Bank's Doing Business indicators. I am happy to note that CII's efforts in simplification of procedures yielded significant results.

We got a tremendous response from regions and Members by holding National Council meetings outside metros - at Pune, Guwahati, Chandigarh and Hyderabad, as Kochi meeting was cancelled due to floods.

CII came out with many new ideas for revitalizing farming, the income source for the majority of workers. We submitted recommendations on Ease of Doing Agriculture index, long term leasing of agriculture land, freedom to farmers to sell directly in addition to Mandis and harnessing solar power as a third crop. We also conducted many pan-India workshops to promote horticulture trade through the electronic platform, e-NAM. I firmly believe that it is our responsibility to ensure stronger Industry participation in agriculture for inclusive growth.

India has the potential to play a major role in the emerging technologies and digital economy. CII continued its work on stimulating Industry investments in R&D and promoting start-ups.

With job creation and skill development as key imperatives for Industry, we scaled up our initiatives of multi-skill centers, Model Career Centers and job fairs. These provide tangible benefits to lakhs of youth and we are achieving ambitious targets on this front.

This year, focus on the North East was a personal mission for me. Apart from meeting Chief Ministers of the region, we also felicitated notable sportswomen which helped attract investor attention. With multiple opportunities for business as well as connecting with our vibrant East Asian neighborhood, Industry would do well to expand in this beautiful region.

CII continued to strengthen India's international engagement to connect Indian and global businesses. I had the opportunity of interacting with various Heads of States and Government, policymakers, Industry bodies and think tanks while leading delegations to the US, UK, Japan, Singapore, Australia, South Africa, Chile, Russia and Uzbekistan, among others. A particularly important occasion was our visit to Singapore, as we celebrated 25 years of CII's engagement with this important country. Globalization will remain a key source of India's future growth and Indian Industry must actively participate in the new opportunities arising in the global marketplace.

In the sustainability sphere, it was very satisfying to launch the India Business Disability Network for accessible corporate workplaces. A notable initiative for sustainability was our pilot project with farmers in two Punjab districts to address stubble burning that is impacting air quality. Sensitization of 3,000 farmers and alternative biomass management over 15,000 acres was indeed a success story.

CII engaged intensely in disaster relief during the damaging Kerala floods. It was heartening that so many companies came forward with relief material and volunteers, enabling a targeted and long-term response. I am happy that Young Indians (Yi) actively participated in the relief efforts. In fact, Yi now has a vast presence across the country with 42 chapters.

We had started the Mentorship Programme when I was Vice President and I am happy to see how it has taken off. 165 Mentors volunteered and some 340 new joinees received guidance.

It was personally fulfilling to contribute to a productive year in CII. I extend warm gratitude to Uday and Vikram for sharing my responsibilities and their continuous support throughout the year. I also thank the Regional Chairpersons for their dedication and for bringing innovative ideas to the table. I deeply appreciate the efforts of all the Council and Committee Chairpersons, the office bearers and CII Secretariat for their contributions that yielded another successful year for CII.



Mr Uday Kotak
President-Designate, CII

PRESIDENT DESIGNATE'S REPORT LOOKING AHEAD

CII's contribution to nation building has grown markedly over the years and policy interventions took centerstage during 2018-19 as we embarked on driving growth across all sectors by addressing key horizontal issues. Our engagement with central and state Governments for providing Industry inputs as well as partnerships for action in key areas remained robust, bringing new opportunities for Industry members.

With India continuing on a strong growth path, it was important to boost private sector investments. Towards this, CII strongly took up the liquidity and credit availability challenges in the financial sector with the Government and RBI. We submitted notable recommendations on resolving issues facing Non-Banking Financial Corporations (NBFCs), increasing capital for public sector banks, and building liquidity in the system.

Specific suggestions to ease credit access for the MSME sector were provided, including lowering margin and guarantee requirements and faster processing. I am happy that RBI took up timely credit approvals as per our submissions.

India has huge potential to become a global manufacturing hub. CII developed a roadmap for achieving the target of 'US \$1 Trillion Manufacturing Economy by 2025' and identified critical horizontal and sectoral measures. To promote smart manufacturing, CII launched a portal, www.ciismart.in, which showcases its productivity impact.

Sector-specific issues such as tariff and non-tariff barriers for capital goods, regulatory hurdles, upcoming mining leases, and appropriate timeframe for iron and steel plants to adopt environmental standards were taken up with the Government. CII continued its efforts towards intelligent urbanization towards the mission of 100 Smart Cities.

Our infrastructure needs are humongous, and finance remains a challenge for the sector. CII suggested that the Government set up more Development Finance Institutions (DFIs) which could raise long term funds for the sector. As delayed payments impact project progress, we took this up with concerned ministries extensively. On power, including renewable energy, apart from end-to-end policy recommendations, CII also actively participated on several platforms, such as International Solar Alliance and RE-INVEST, with the Government.

India's services sector fuels the country's growth accounting for a major part of the GDP and our Services Council has been focusing on expanding the services export portfolio and exploring newer markets. To enable India to maximize its comparative advantages, we are involved in creating a robust standards ecosystem and conformity assessment platform.

Ayushman Bharat, the world's largest healthcare scheme, was a landmark initiative by the Government this year. CII welcomes the thrust on affordable healthcare for all and is working towards encouraging private healthcare provider participation.

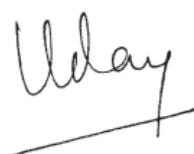
MSMEs are huge employment generators and were a high focus during the year, as we took up the issues of delayed payments, public procurement, and interest rate subventions. I am also happy to share that about INR 835 crore worth of funding opportunities were received at the CII MSME Finance Facilitation Centre, and the Centre has reached out to over 4,000 MSMEs through roadshows and webinars. The CII Centres of Excellence too provide excellent services for building competitiveness and I urge MSME Members to avail of these.

CII Associations' Council (ASCON), which brings together more than 100 national level sectoral associations on a

common platform, continues to play an instrumental role in shaping policy and providing insights into performance and outlook for Industry through its surveys and reports.

India's export potential remains largely untapped and during the year we advocated fiscal incentives, procedural rationalization, and enhancing market access to boost exports. Besides, our overseas connectivity in terms of inward and outward delegations continued at a fast pace. I must stress that with the rest of the world trading through free trade arrangements, India too has to become a part of the upcoming agreements, despite the move towards protectionism in some economies.

We need to accelerate the momentum of CII's multi-stakeholder approach to nation-building and I look forward to the continuing contributions of all Members as we collectively work towards India@75.





Mr Vikram Kirloskar
Vice President, CII

VICE PRESIDENT'S COMMENTS REACHING OUT

Creating an ecosystem for economic growth requires multiple stakeholders, and CII, through its many Councils and Committees, engages closely with Government, Industry and civil society to strengthen the overall competitiveness of Indian Industry and facilitate entrepreneurship.

CII's business development initiatives, through conferences and events, have helped Industry showcase and experience the best across the globe. Our events have grown to become best-in-class and it was a matter of pride that we were recognized with prestigious awards as a top exhibition organizer. This year, we also added to our trade fairs portfolio with the 1st edition of ConMac in Nepal, which was the largest construction equipment exhibition held in that country.

I was particularly proud that we organised the first Future Mobility Show and conference to achieve the national objectives of responsible mobility, energy security, environment, urban mobility and Make in India, truly a pioneer for a smooth transition towards a sustainable mobility ecosystem.

At the International Engineering and Technology Fair (IETF), CII introduced a new show on Artificial Intelligence, attracting the general public. India Pavilions were taken up in Ukraine, Korea, Mexico and other countries, and continued to help build business for Indian Industry.

Our Centres of Excellence continue to serve Industry through consultancy, advisory and training services in many relevant areas. I am happy that CII's Indian Green Building Council (IGBC) launched 3 new green building rating systems and has led India's rise to second rank in the world in registered green building footprint with over 6.63 billion square feet. FACE has taken up nutrition and agri competitiveness in a big way. Each of our CoEs

has emerged as a leader in policy advocacy and action programmes and continues to come out with innovative services for building Industry competitiveness and sustainability.

Our Regional and State Offices have stepped up engagement with Government and Industry across the country, to address issues related to investment, ease of doing business, creating business opportunities and helping firms strengthen their engagement with society. In Jharkhand, efforts to mainstream tribal communities were bolstered through the 1st edition of the Tribal Development Meet. CII remained a preferred partner for State Governments for key events of international stature, and together helped build brand India for a large global audience.

The CII Foundation continued its efforts on three key areas of environment and climate change resilience, women empowerment and early childhood education. Three outstanding women achievers were recognized through the Women Exemplar Awards for their impactful work at the grassroots level. It is heartening to see how this recognition furthers their resolve to bring about much-needed socio-economic changes in society.

I am pleased to share that this year, we consolidated our knowledge leadership through the CII Research vertical, which brought out many insightful reports. CII publications and newsletters represent a font of new ideas and policy solutions and I would urge you to take advantage of them. The year also saw a huge jump in our outreach through social media platforms, while MyCII continues to aggregate valuable material for the use of Industry.

Membership engagement is the foundation of CII and the year was marked by many meetings with Members

to deliberate on issues and crystallise our thoughts and views to strengthen Industry. Our services portfolio for Members, which includes a mentorship programme, has been very well received and we continue to better our initiatives for real gains. It gives me immense pleasure to interact with our Members and work together towards India's development. I would specially like to commend the invaluable support we received from Members during the Kerala flood crisis last year, where CII took the lead to provide relief and rehabilitation services to the affected.

I look forward to strengthening our engagement as we work together to transform Indian Industry and India.



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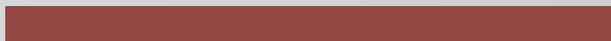
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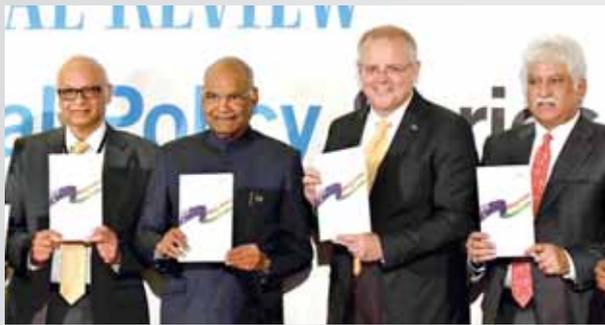
CII IN THE REGIONS



216

MEMBERSHIP
SERVICES





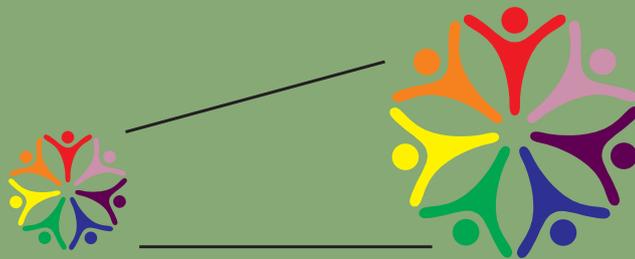


INDIA@75



RESPONSIBLE
INCLUSIVE
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ENTREPRENEURIAL





INDIA @ 75

MISSION 2022

a **CII** initiative

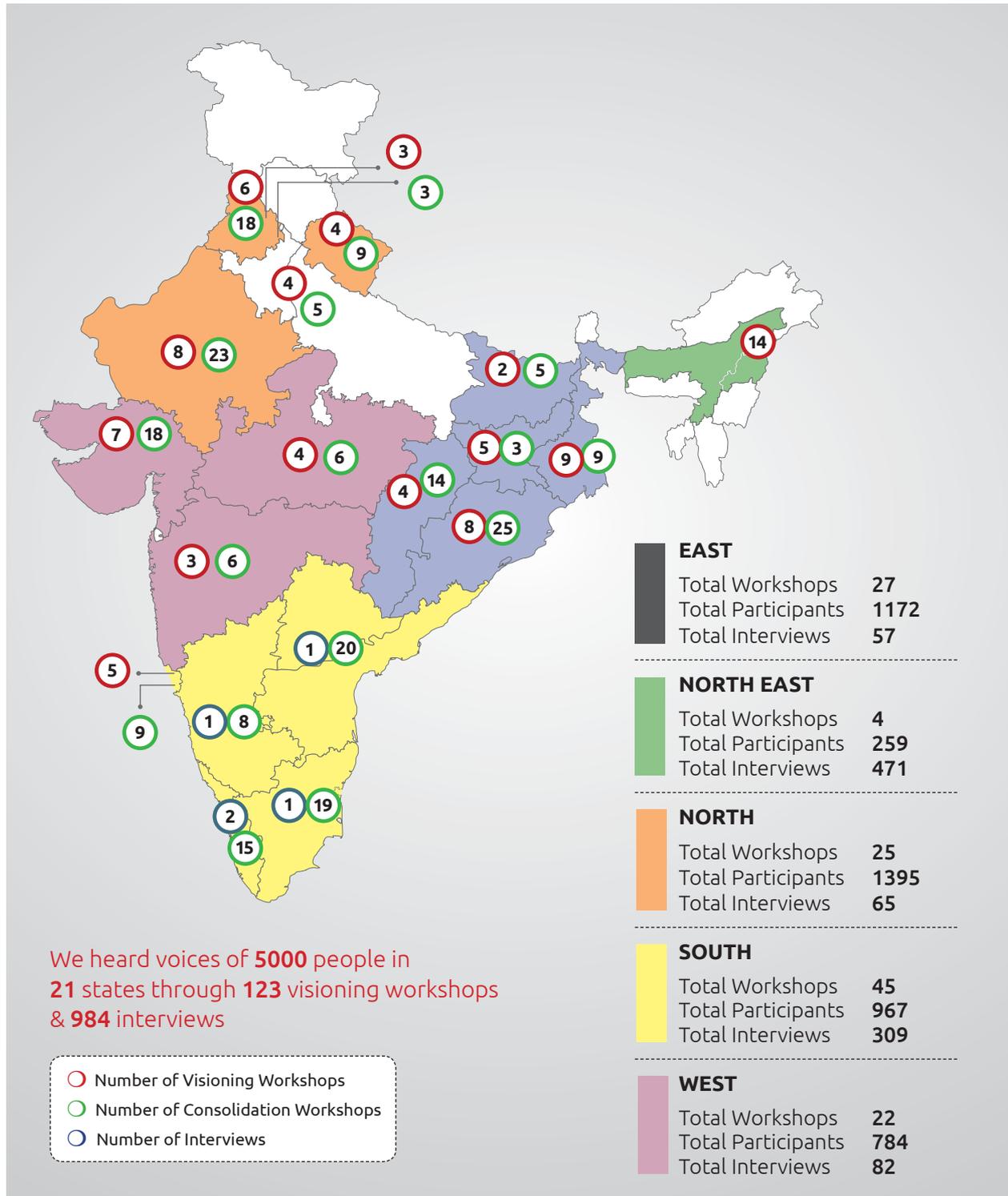


INDIA@75

JOURNEY & IMPACT



GENESIS – VISIONING EXERCISE



VISION ELEMENTS

Moral Leadership, Good Governance

- India as the new moral voice for the world
- India symbolizing universality and inclusiveness

Arts, Literature & Sports

- Excellence in sports at global level

Agriculture, Food Security & Health

- Access to nutritious and balanced meals for all
- Affordable and accessible world class healthcare for all

Education & Skill Development

- World's largest pool of trained manpower
- 500 Million globally employable skilled workforce
- 100% Functional & financial literacy

Business & Economy

- India to account for 10% of global trade
- India to be the home for at least 30 of the Fortune 100 firms

Technology & Innovation

- India to be the source of global innovation for new businesses

Urbanization & Environmental Sustainability

- 500 Developed and smart cities through planned urbanization

VOLUNTEERISM ACROSS SECTORS

Moral Leadership, Good Governance & Public Administration	Total Number of Volunteers 1113 Total Volunteering Hours 3989 People Sensitized 2,483,327 CSR Spend (INR Crore) 297.56 Number of Companies 317	
Arts, Literature & Sports	Total Number of Volunteers 2966 Total Volunteering Hours 13,560 People Sensitized 27,649 CSR Spend (INR Crore) 368.69 Number of Companies 290	
Agriculture, Food Security & Health	Total Number of Volunteers 328 Total Volunteering Hours 1533 People Sensitized 412,060 CSR Spend (INR Crore) 3233.22 Number of Companies 1077	
Education & Skill Development	Total Number of Volunteers 2319 Total Volunteering Hours 10,367 People Sensitized 627,414 CSR Spend (INR Crore) 2981.95 Number of Companies 893	
Technology & Innovation	Total Number of Volunteers 131 Total Volunteering Hours 722 People Sensitized 5169 CSR Spend (INR Crore) 3.84 Number of Companies 13	
Urbanization & Environmental Sustainability	Total Number of Volunteers 359 Total Volunteering Hours 1030 People Sensitized 106,802 CSR Spend (INR Crore) 864.2 Number of Companies 382	

India@75, a CII initiative launched in 2008, presented a shared vision of an inclusively developed India by the 75th year of its independence in 2022, through economic strength, technological vitality and moral leadership.

The People's Agenda

Aligned to Professor C K Prahalad's vision of India, a pan-India visioning exercise using a collaborative public reasoning process, was undertaken in 2008. The exercise culminated in the evolution of development plans for 18 Districts and 17 States.

The visioning exercise covered a wide spectrum of society, including students, housewives, slum dwellers, farmers, bureaucrats, academicians and politicians amongst others; over 1000 interviews, 125 workshops with over 10,000 participants and meetings with 6 Chief Ministers resulted in the creation of a national vision document titled 'India@75-The People's Agenda'.

Based on the vision document, that was formally presented to the then Prime Minister, the Government addressed several critical issues such as developing a skilled workforce, giving thrust to renewable energy, focus on health and wellbeing of the people.

CII continued with its India@75 initiative, a flagship initiative aligned to the nation building agenda. To give it a larger mandate, India@75 was registered as a Foundation Trust on 13 July 2012 chaired by Mr Adi Godrej, Past President, CII and 10 other eminent personalities as Member Trustees. Dr Naushad Forbes, Past President, CII chairs the Foundation, with 11 other eminent Member Trustees.

The Impact

Over the last decade, India@75 adopted a three-pronged approach to meet its vision objectives i.e. advocacy, catalysation and direct action.

- Advocacy issues were taken up through various CII platforms, enabling convergence of stakeholders
- Catalysation of best and next practices for adding scale was driven through the CII verticals, councils and committees in sync with the India@75 vision, by leveraging the strengths of CII Membership
- Direct action focussed on urbanization, skill development, functional literacy and volunteerism including pro bono by corporates / professionals, for concerted work.



From L to R: Dr Naushad Forbes, Past President, CII and Chairman, India@75 Foundation and Co-Chairman, Forbes Marshall Pvt Ltd; Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises; Arnab Goswami, MD and Editor-in-Chief, Republic TV; Chandrajit Banerjee, Director General, CII; Rajan Navani, Chairman, CII Council on India@75 and MD, Jetline Group of Companies and Vikram Kirloskar, Vice President, CII, Chairman & MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor at the India@75 media launch in New Delhi



Volunteering Activity at a School in Rayagada, Odisha with partner Bhumi during the National Volunteering Week 2018

These strategies resulted in a convergence of the India@75 vision with the stakeholders i.e. the Government, Industry and civil societies.

Convergence with Government's Vision

Through the years, the India@75 vision elements have echoed in the manifestos and national schemes of the Government. In 2008 the Government acknowledged the target of building a skilled workforce in India by 2022 by setting up the National Skill Development Council and a Corporation in 2008-2009 respectively; in 2014-2015 the Government included in its plans milestones such as 500 developed cities by 2022; achieving 175 gigawatt new & renewable energy; housing for all and access to affordable & accessible healthcare for all Indians.

It was encouraging to see the India@75 vision resonate in the NITI Aayog's 5-year plan for 2022, drafted in 2018, titled as 'The Strategy for New India@75'. The strategy emphasizes the need to action on priority the twelve critical elements including skills, healthcare, innovation and farmers' income.

Convergence with Industry's Initiatives

Under the direct action pillar, India@75 pursued several initiatives aligned to the focus areas defined in the Foundation's vision document.

- Volunteering being a flagship initiative, as a strategy for civic engagement, has a proven execution framework that is being increasingly adopted by various organisations. This has resulted in the evolution of a movement, with growing

participation of people, civil societies, Government and business organisations. The National Volunteer Week (NVW), a yearly feature, began in 2013 with the theme '1 For India'. NVW forms part of the National Volunteering Grid (NVG), under the overarching strategic civic initiative for sustained engagement of individuals, communities, non-profits and corporates to celebrate the spirit of volunteerism in India. During NVW 2018, held for the 5th year in succession, about 500 volunteering activities in 75 Indian cities, generated over half a

**IMPACT –
VOLUNTEERISM**

Since inception in 2014,
the initiative has

**INVOLVED
20 Million PEOPLE**

**ENCOMPASSED
3 Million VOLUNTEERS**

**VOLUNTEER TIME
3 Million HOURS**

million volunteering hours and sensitised about 1.6 million people. To further support volunteering, the National Volunteering Grid, a national backbone infrastructure, was created for volunteers and civil society organisations to collaborate

- Standalone sensitisation / engagement activities such as personal carbon foot printing, Each1-Teach1, seed ball making and tree plantation were taken to corporates across the country
- A media campaign, launched in collaboration with Republic TV, proposes to optimally leverage contemporary technology platforms especially social, digital and electronic media. Leading champions of Indian Industry and academia deliberated on the journey of the last decade in a session anchored by Arnab Goswami. Issues needing priority attention, to augment the efforts of the Central and State Governments towards the mission mode schemes, were identified. The campaign, launched in Delhi, is slated to be spread across India
- In recognition of India's North Eastern (NE) region as a priority for the country, a Special India@75 Session was held in Guwahati. Focused on Inclusive & Sustainable Development of NE region by 2022, the session deliberated upon immediate concerns and explored Public Private Partnership (PPP) initiatives for the NE, in immediate and short term. The Chief Ministers of Assam, Meghalaya & Arunachal



Road Safety Awareness sensitization drive in Indore, Madhya Pradesh with partner Bhumi during the National Volunteering Week 2018

Pradesh, Deputy Chief Minister of Tripura and the Minister of Industry, Assam interacted with leading Industry players, senior bureaucrats and civil society representatives. Some initiatives that could be launched immediately by the Industry, Government as well as the civil society were identified.

India@75 Pro Bono

India@75 also evolved Pro Bono Consulting, a unique concept of volunteering for professionals. This concept revolves around enabling professionals to use their skills and training for national development, through capacity building of non-profits and helping them achieve impact and scale. Pro Bono connects skilled professionals, organisation employees and independent professionals with non-profits through the National Volunteering Grid.



From L to R: S K Barua, Chairman, CII North East Council and MD, Numaligarh Refinery Ltd; Conrad Sangma, Chief Minister of Meghalaya; Vikram Kirloskar; Saikhom Mirabai Chanu; Hima Das; Dipa Karmakar; Rakesh Bharti Mittal; Chandrajit Banerjee; MC Mary Kom; Arnab Goswami; Pema Khandu, Chief Minister of Arunachal Pradesh and Jishnu Dev Varma, Deputy Chief Minister of Tripura at the Special Session on Inclusive & Sustainable Development of NE Region by 2022 in Guwahati



Wall Painting of a Community Resource Centre with partner Lakshyam during the National Volunteering Week 2018



Free Medical Check Up and Medicine Distribution in Shakti Khand, Ghaziabad with partner Nirbhed Foundation during the National Volunteering Week 2018

More than 700 non-profit organisations across the country engaged in building their capacities through Pro Bono contribution of time and knowledge by skilled corporate volunteers. Under the E-PowerTrac series two Pro Bono Webinars engaged with nearly 50 non-profit organisations.

Going Forward

The CII leadership has reaffirmed its commitment to deliver on the India@75 vision objectives with a renewed zest. Plans are afoot to achieve the vision in mission mode by bringing all stakeholders into its fold and aligning the organisational agenda to the vision elements of India@75, which have resonated well with national priorities too.

IMPACT PRO BONO



4800

Non Profits Registered



1300

Projects Initiated



500+

Projects Delivered



25 Mn

Volunteer Value



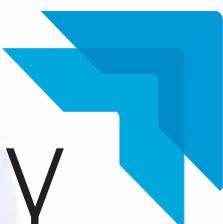
50 Mn

Value Delivered



1600

Registered Corporate Volunteers



POLICY ADVOCACY



- ▶ Economic Policy
- ▶ CII Research
- ▶ Ease of Doing Business
- ▶ Corporate Governance and Regulatory Affairs
- ▶ Integrity and Transparency in Governance
- ▶ Financial Reporting and NFCG
- ▶ Public Policy
- ▶ Taxation



ECONOMIC POLICY

Year 2018-19 was an encouraging one for the Indian economy; growth was on the rebound, powered by recovery in consumption demand, accompanied by an upswing in private capital investment. However, there were macro headwinds emanating from both domestic as well as external factors. The latter included volatile oil prices, rising interest rates, and the ongoing trade war between US and China. Internally, the burden of delayed projects and liquidity crisis weighed on the investment cycle. CII worked closely with Industry and the Government to draw up policy recommendations that could take the economy to a higher growth orbit.

Recommendations on meeting the current macro-economic challenges related to the Indian economy and managing the rupee volatility against the US dollar were shared with the Government. Suggestions for structural and sectoral reforms to drive sustained long-term growth, including a roadmap for making India a US\$ 5 trillion economy were debated with the Government. In addition, deliberations were held on

how India could achieve its aspiration of becoming a US\$ 1 trillion manufacturing economy.

Discussions were triggered with Members as well as policy makers, on critical topics including the current state of the economy, measures for economic revival, employment generation, enhancing exports, and the monetary policy.

In addition to accepting and including several CII recommendations in policy announcements, the Government asked for inputs on specific issues as well. Consequently, a survey-based report was compiled to assess the extent of delayed payments by Government agencies to the private sector. A comprehensive report on the trade and retail sector issues, being faced in the States, was shared with the Government.

Extensive analysis of fiscal performance was carried out to devise a toolkit for determining fiscal health of the Centre and States. This examined the idea that



Interaction with Arun Jaitley, Minister of Finance & Corporate Affairs in New Delhi. From L to R: Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd; Arun Jaitley; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises and Chandrajit Banerjee, Director General, CII

the extent of fiscal deficit should not be the only determinant for looking at an economy's stability and suggested that a composite index would be better able to capture this indicator. A composite Fiscal Performance Index was designed by incorporating six indicators of the quality of revenue and spending. Revenue expenditure on critical areas such as healthcare and education is essential to growth, while capital expenditure on infrastructure and other facilities needs to be counted as well.

Meetings and interactive sessions with Ministers and senior Government officials, including Dr Rajiv Kumar, Vice Chairman, NITI Aayog; Shri Arun Jaitley, Minister of Finance and Corporate Affairs; the then Chief Economic Advisor, Dr Arvind Subramanian; Mr Subhash Chandra Garg, Secretary, Economic Affairs Department, Ministry of Finance and the current Chief Economic Adviser Dr Krishnamurthy Subramanian, provided opportunities to share considered views of the Industry with key policy makers. The strategic areas of discussion included achieving fiscal deficit targets, reviving investments, boosting exports, addressing liquidity issues, enhancing credit to MSMEs and infrastructure sectors and issues related to corporate governance.

Publications

'Economy Matters', a monthly CII publication, continued to provide insights on economic development, both on the domestic and global fronts. Subject experts from Government, Industry and academia also shared their detailed analysis of important policy issues.



Dr Krishnamurthy Subramanian, Chief Economic Adviser and Vinayak Chatterjee, Chairman, CII Economic Affairs Council and Chairman, Feedback Infra at an Interactive Session in New Delhi

Monthly updates on 14 economic parameters, in the form of easy to read graphs and charts, were carried in the 'CII Ready Reckoner- Key Economic Statistics', which has emerged as a go to source for succinct updates on the economy.

Surveys

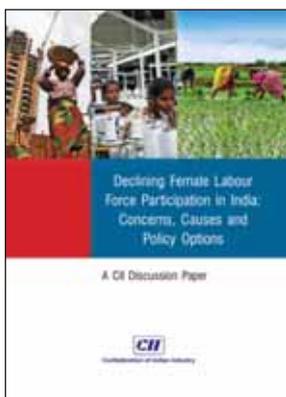
The Quarterly Business Outlook Survey, pertaining to the current and future economic conditions prevailing in the country, continued to be widely read and quoted. The large number of responses from Members across the country, combined with the rigor of a robust methodology, lend accuracy and authenticity to the results. The CEO Poll tracked Industry's views and outlook on growth, investment, exports, profitability and key economic challenges.



Vinayak Chatterjee with Subhash Chandra Garg, Secretary, Economic Affairs Department, Ministry of Finance at an Interactive Session in New Delhi

CII RESEARCH

Over the years, CII's knowledge output has remained robust and well-regarded. During 2018-19, CII's analytical content was consolidated and re-branded under the rubric of CII Research. This service provides thought-leadership for Industry, collating & analysing data and inputs from stakeholders for in-depth insights. The need for such an Industry think-tank emanated from the lack of adequate Industry connect of most economic research institutions. CII, through a direct contact with enterprises across sizes, sectors & regions, has the capacity to source inputs and submit recommendations based on Industry perspectives. Discussion papers and study reports undertaken during 2018-19 include:



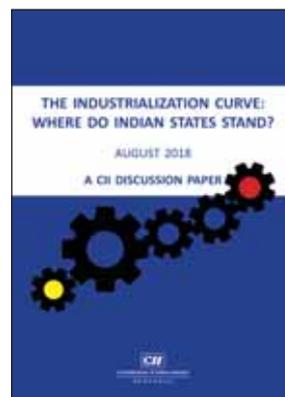
Declining Female Labour Force Participation in India: Concerns, Causes and Policy Options

An in-depth analysis of female labour force participation rates in the country over the last three decades to study the sectoral trends across agriculture, manufacturing and services in urban and rural areas. The paper finds that the sectors with highest women participation include manufacturing, certain services such as transport, storage & communications.



The Lion Conquers the Forest: India – A US\$ 1 Trillion Manufacturing Economy

A comprehensive analysis of the potential growth drivers for manufacturing sector was undertaken, to ensure that it reaches US\$ 1 trillion by 2025. The paper identifies horizontal and vertical interventions on an 'escalator' for increasing manufacturing gross value added and better integration into global value chains.



The Industrialization Curve: Where Do Indian States Stand?

The study examines the sectoral economic trends of large Indian States between 2011-12 & 2016-17. It also assesses which States are positioned up the development curve in terms of contributions by agriculture, Industry and services. It finds significant gaps in the industrialization stages of different States and highlights the importance of balanced regional growth.



India's High-Technology Exports: Aiming for the Big League

This paper provides a detailed analysis of high-technology exports from India. These items, listed by OECD, include sectors such as electronics, machinery, aerospace, pharmaceuticals amongst others. To leverage its potential, India needs to scale up the ladder by converging policies on manufacturing, exports and R&D.



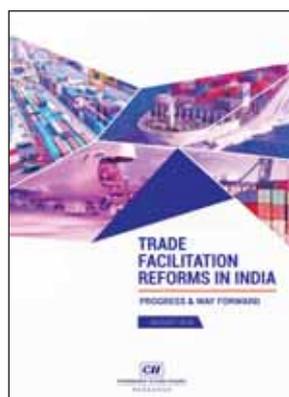
NBFC Sector: The Road Ahead

During the year, Non-Banking Finance Companies (NBFCs) faced several challenges as banks curtailed lending to these institutions. CII provided comprehensive actionable inputs for addressing these issues and strengthening the system to minimize impact on the real sector.



Interim Budget 2019: An Analysis

CII's analysis of the Interim Budget 2019 presented on 1st February 2019 captured trends in the fiscal landscape, announcements on key sectors and taxation announcements.



Trade Facilitation Reforms in India: Progress and Way Forward

The report captures, in detail, various policy measures taken towards trade facilitation in recent years by the various authorities and agencies such as customs, port authorities, central bank and identifies key gap areas. It notes that an effective port communication system, expansion of Authorized Economic Operators, and improved use of IT, amongst others, can propel India to a higher level in cross border trade.

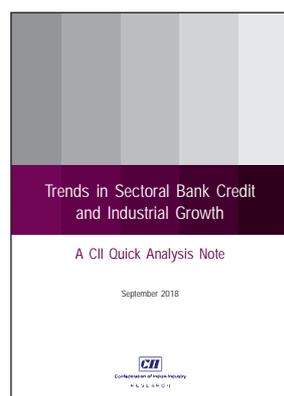
US – China Trade Opportunities for India

This paper delves in detail into the additional tariffs imposed by both US and China during 2018 on the products traded between them. It synchs these products with Indian exports to the US, identifying areas of opportunity for Indian goods.



Easing Financing Challenges of MSME Sector: Short Term Recommendations

Given the added challenges posed by liquidity shortages for the MSME sector, cogent suggestions were submitted to the relevant authorities. Some key suggestions included lowering of guarantee requirements for MSME and timely processing of applications by banks.



Trends in Sectoral Bank Credit and Industrial Growth

This quick analysis note examines the co-relation between bank credit trends and industrial production trends across various key sectors.



Reviving the Financial Sector: Short Term Recommendations

In view of the liquidity shortages in the financial system, various suggestions were presented to the RBI and the Ministry of Finance for ensuring better credit availability and providing immediate relief to Industry.

Going forward, CII's Research service, envisaged as a go-to destination for inputs and analysis on Industry matters, will be strengthened to achieve a leading position in the universe of Indian think-tanks. In-depth surveys, analysis, data crunching, and ideation will be undertaken to provide innovative solutions and concrete action points for policy makers and Industry.

EASE OF DOING BUSINESS

Year 2018 was a landmark year for India, as the country leapfrogged to the 77th position on the Ease of Doing Business Index in the latest Doing Business Report of the World Bank. India stood at the 100th position in 2017 and 142nd position in 2015. Within 4 years, the country moved to the top of the list of South Asian countries and at the 3rd spot amongst the BRICS nations. In these 4 years, CII worked in lockstep with the Government, both at the Central as well as at the State-level, in improving the country's business climate by enhancing the simplification, transparency & efficiency of regulatory processes and procedures for businesses. The Industry-Government partnership on ease of doing business reforms strives to help India join the league of the top 50 nations within the next 2 years.

ADVOCACY

A slew of meetings, representations, survey-based reports, workshops and conferences formed the foundation of the strong policy advocacy work towards improving ease of doing business in India. The recommendations on trade facilitation, starting a business, and paying taxes, were amongst those well received by the Government.

Suggestions made to Shri Narendra Modi, Prime Minister of India, during an ease of doing business interaction

included improving the online Single Window System (SWS), easing labour compliances, encouraging States to develop a Central Inspection System (CIS), and strengthening the mechanism for enforcing contracts. Specific suggestions towards trade facilitation included popularizing the Authorised Economic Operator (AEO) programme amongst stakeholders, separating customs from Container Freight Stations' functions, facilitating larger magnitude of cargo under the Risk Management System (RMS), developing an effective grievance redressal mechanism, and ensuring the availability of trade related agencies on a common portal.

Going forward, reforms will be proposed on key areas of ease of doing business. Some of these include strengthening the online SWS across States; rationalizing, streamlining & integrating inspections; and ensuring easier processes & procedures for complying with labour laws, environment regulations, tax payments and land procurement. CII will also continue to advocate for a stronger mechanism for enforcing contracts, speedy dispute resolution, widening the scope of self/ third-party certifications, among other reform measures.

ACTION

Throughout the year, several opportunities were created for stakeholders to engage with policy makers,



From L to R: Sanjay Gupta, President, Institute of Cost Accountants of India; Dr M S Sahoo, Chairman, Insolvency and Bankruptcy Board of India; Injeti Srinivas, Secretary, Ministry of Corporate Affairs; Sunil Kant Munjal, Past President, CII and then Chairman, CII Task Force on Ease of Doing Business and Chairman, Hero Enterprise and Bahram Vakil, Founding Partner, AZB & Partners, at the National Conference on Resolving Insolvency in India in New Delhi



From L to R: Sunil Kumar Das, Principal Commissioner, Mumbai Customs Zone-I; APS Suri, Chief Commissioner of Customs, Mumbai Zone-III; Vivek Johri, Chief Commissioner of Customs, Mumbai Zone-II and Milon K Nag, Co-Chairman, CII Task Force on Ease of Doing Business and Chairman & MD, K K Nag Pvt Ltd at the Conference on Reforms on Trade Facilitation in Mumbai

collate feedback and provide considered views for improving ease of doing business in the country. While acknowledging the business reforms introduced by the Government, the Industry Members also offered suggestions for resolving pending regulatory and policy issues in the sphere of ease of doing business through reports, survey and conferences.

Efforts to improve performance on resolving insolvency were driven through a conference held in partnership with the Ministry of Corporate Affairs (MCA) and the Insolvency and Bankruptcy Board of India (IBBI). Towards this end, the conference focused on stronger implementation of the Insolvency and Bankruptcy Code (IBC), 2016. Senior Government officials, including Secretary, MCA, and Chairman, IBBI, assured stakeholders that remedial measures will be taken to resolve pending

issues in capacity building of insolvency professionals, faster resolution of cases by NCLT, augmentation of institutional and infrastructural mechanisms, amongst others. Awareness about reforms directed at improving trade facilitation in the country was created in partnership with the Central Board of Indirect Taxes and Customs (CBIC), Ministry of Finance, and the Jawaharlal Nehru Port Trust (JNPT), Mumbai. Under this partnership, feedback for improvement was also invited from stakeholders through various initiatives. A trade facilitation event, organised jointly with CBIC and the World Customs Organization (WCO) discussed adoption of trade facilitation best practices by countries in the Asia Pacific and greater collaborative efforts in the region. Amongst other key officials, Minister of State for Finance, the Secretary General, WCO, and senior WCO officials from 33 countries participated in the programme.



From L to R: Shiv Pratap Shukla, Minister of State for Finance; Pranab Kumar Das, Chairman, Customs; Atsushi IIZUKA, DG Customs, Japan; Dr Kunio Mikuriya, Secretary General, WCO; S Ramesh, then Chairman, CBIC; Visvanath Das, CEO, Revenue and Customs Service, Fiji and L Satya Srinivas, Joint Secretary, Customs at the Conference on Customs Facilitating Cross Border Clearances in New Delhi

CORPORATE GOVERNANCE AND REGULATORY AFFAIRS

Globally, Governments and law-makers are endeavoring to legislate good governance, while promoting and disseminating the understanding of best practices for voluntary adoption. As regulators strive to deter non-compliance, Industry and responsible corporates are adopting exemplary corporate behavior, CII continues to lead the corporate governance movement in the country by recommending best practices for adoption by the Industry. Focused on initiatives aimed at fostering a corporate governance culture in the Indian Industry, CII strongly encourages voluntary adoption of best practices and self-regulation, thus obviating the need for additional regulations.

ADVOCACY

Creation of a conducive regulatory environment for Industry's growth, by initiating comprehensive and sustained policy advocacy has remained an important area of work over the years. Towards this end, recommendations were made to the Government and regulators on corporate laws, SEBI regulations and the Competition Law for creating a facilitative business environment. CII engaged extensively with

relevant authorities such as the Ministry of Corporate Affairs (MCA), Securities and Exchange Board of India, Insolvency and Bankruptcy Board of India and Competition Commission of India (CCI). Suggestions were made to further strengthen the Insolvency and Bankruptcy Code, being acknowledged as a significant reform to put forward a robust legal framework for stressed companies, and placing Indian regulations at par with global laws. A representation was submitted to the Committee on Competition Law constituted by the Ministry of Corporate Affairs as well as to the CCI with respect to the Procedure on (Business Relating to Combinations) Amendment Regulations, 2018.

Engagement with SEBI

During the year, a thrust was given to the agenda on corporate governance and related SEBI regulations. On the amendments to SEBI LODR Regulations, pursuant to the Kotak Committee Recommendations, a request was made to reconsider the requirement of the Chairperson and MD/CEO being unrelated and issuance of a clarification on age limit for appointment or continuation of Non-Executive Director (NED). Recommendations



From L to R: Ajay Bahl, Co-Founder and Managing Partner, AZB & Partners; Pallavi Shroff, Managing Partner and National Practice Head-Dispute Resolution, Shardul Amarchand Mangaldas & Co; Injeti Srinivas, Secretary, Ministry of Corporate Affairs; Sudhir Mittal, Chairperson, Competition Commission of India and R Mukundan, Chairman, CII Institute of Quality Advisory Council & CII National Committee on Environment and MD & CEO, Tata Chemicals Ltd at the Roadshow on Competition Law in Mumbai

were submitted on a SEBI consultative paper dealing with the revision of provisions on shareholder re-classification. CII also shared the Industry's view on the SEBI Expert Committee Report on listing of equity shares of companies, incorporated in India, on foreign stock exchanges and vice versa.

Companies Act 2013

After the promulgation of the Companies Amendment (Ordinance), 2018, the Ministry of Corporate Affairs (MCA) suggested certain amendments to strengthen corporate governance and enforcement framework. Detailed suggestions were shared with MCA on the amendments and proposed amendments. Industry issues on a range of subjects were taken up with the MCA during the year. Some of these included decriminalisation of offenses, transfer of the unspent CSR funds to a separate account, declaration of significant beneficial interest, buy-back and dematerialization of shares as well as appointment & remuneration of independent directors.

ACTION

The importance attached to the Insolvency and Bankruptcy Code, as a reform-driven legislation, was highlighted at a series of interactions with the Minister and the Secretary, MCA. Conferences on Insolvency Code were an opportunity to delve deeper into the Code and deliberate on the Ordinance and subsequent regulations. Issues related to recommendations on bad loan resolution, valuation, litigations with respect to the IBC (Second Amendment) Act, 2018 introduced in the Lok Sabha found focus of the delegates at these interactions, held during the year.



From L to R: Shardul Shroff, Chairman, CII National Committee on Legal Services, Co-Chairman, CII Task Force on Judicial Reforms and Executive Chairman, Shardul Amarchand Mangaldas & Co; Dr M S Sahoo, Chairman, Insolvency and Bankruptcy Board of India; Injeti Srinivas and Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd at the Conference on Insolvency and Bankruptcy Code, Learnings, Challenges and Way Forward in Mumbai

Regulatory, taxation, finance and technology regimes were discussed at length at the Mergers, Acquisitions and Restructuring Summit 2018. The Summit also provided an overview of the international M&A landscape while providing insights into the emerging trends. A report on value creation through M&As and another report outlining 20 months of IBC in India, were released during the Summit.

While continuing to engage extensively with the CCI, stakeholders were brought together to discuss the Competition Law through a series of roadshows. The Minister of Finance; Secretary, MCA; Chairperson, CCI and other senior officials addressed the Industry's issues.

The December 2018 issue of CII Policy Watch focused on Corporate Laws and Integrity and Transparency in Governance was also released.



From L to R: R Mukundan; Ashishkumar Chauhan, MD & CEO, Bombay Stock Exchange; Smita Jhingran, Secretary, Competition Commission of India and Leo Puri, Chairman, CII National Committee on Financial Markets at the Mergers, Acquisitions and Restructuring Summit 2018 in Mumbai

INTEGRITY AND TRANSPARENCY IN GOVERNANCE

Industry being one of the strongest pillars of the economy, needs to focus on ethical conduct away from vested interests, for the welfare of the society at large. Ethically managed companies are essential to generate sustainable growth. In addition, integrity and transparency are vital components of governance, not to be compromised. The CII Task Force on Integrity and Transparency in Governance thus strives to encourage Indian Industry to follow ethical business practices. Apart from creating platforms for exchanging views, information, experiences and best practices on doing business ethically, CII also engages with the Government to advocate for simplified laws and transparent policies towards anti-corruption practices.

ADVOCACY

During the year, a series of recommendations and suggestions were submitted to the Ministry of Personnel, Public Grievances and Pensions, Ministry of Corporate Affairs, and the Ministry of Law and Justice. These included a detailed representation for review of provisions of the Prevention of Corruption (Amendment)

Act, 2018. The Amendment Act specifically notifies that giving bribes to public servants is an offence. The Central Government has also mandated organisations to formulate internal guidelines and policies to prevent bribing of public servants.

ACTION

Ethics in Business

Keeping in mind the importance of ethical practices in business for the Industry's growth and development, Members were encouraged to adhere to the 'CII Model Code of Conduct for Business Ethics'. The Code continues to act as a guide to Industry to adopt best practices in business. It outlines the basic principles of doing business ethically and involves adoption of policies & procedures in this direction. The adoption of a simplified code by SMEs is a landmark step in inculcating a culture of ethics and good practices in corporates. To inspire a larger number of companies to follow this direction, the names of companies adopting the Code are published on the CII website.



From L to R: Shardul Shroff, Chairman, CII National Committee on Legal Services, Co-Chairman, CII Task Force on Judicial Reforms and Executive Chairman, Shardul Amarchand Mangaldas & Co; Deep Kapuria, Chairman, Project Steering Committee for Siemens Integrity Initiative by CII Centre of Excellence for Sustainable Development and Chairman, The Hi-Tech Group; Sumit Mazumder, Past President, CII, Chairman, CII Task Force on Integrity and Transparency in Governance, Chairman and MD, TIL Limited; Dr Jitendra Singh, Minister of State (I/C) for Development of North Eastern Region, Minister of State for Prime Minister's Office, Ministry of Personnel, Public Grievances and Pensions, Atomic Energy and Space and Satil Singhal, Chairman, CII Agriculture Council and Chairman Emeritus, PI Industries Ltd at the Summit on Integrity and Transparency in Governance in New Delhi



From L to R: Sumit Mazumder; Vishal Wanchoo, President and CEO - South Asia, GE; Dr Tejendra Mohan Bhasin, Vigilance Commissioner, Central Vigilance Commission and Atul Kumar, Chief General Manager & Chief Ethics Officer, State Bank of India at the 2018 South Asia Ethics Summit in New Delhi

Business and Human Rights

An 'Advisory on Business and Human Rights' with general principles on human rights, was released with a view to guiding Industry on respecting and promoting such rights. Recommended actions for companies to adhere to integrity and transparency in business transactions were also outlined.

Members are encouraged to assume responsibility to respect and promote human rights by adopting a 'know and show' human rights-risks approach. A beginning can be made with a 'public commitment' to respect human rights. Members are also encouraged to initiate the process of 'human rights due-diligence'. This would enable companies to assess risks to human rights, integrate findings into decision-making and mitigate the risks, track effectiveness of the measures, and communicate efforts. Several companies have begun to develop processes to take remedial action for those who may be harmed by the company's actions or decisions.

Integrity and Transparency in Governance

Creating a culture of trust and ethics was the focus of the Summit on integrity and transparency in governance. There was consensus on the thinking that building a

corruption free environment is the joint responsibility of the Industry, the society and the Government. Delegates also deliberated on economic value creation through governance, human rights being the foundation of a sustainable business, the role of compliance and strengthening good governance and business ethics.

Partnership with Ethisphere

The partnership with The Ethisphere Institute, a global leader in defining and advancing standards of ethical business practices, continued to expand with Business Ethics Leadership Alliance (BELA), the South Asia Chapter of the Institute. This is a community of select multinational companies that will shape the strategic and tactical direction, while playing a leadership role in furthering ethics, integrity and anti-corruption efforts across India and South Asia. The South Asia Ethics Summit, marking the first year anniversary of BELA, convened senior business, compliance, and ethics leaders from BELA South Asia and other leading organisations critical to the business ecosystem. The participants reiterated their commitment to business values through interactive dialogues and shared best practices as well as actionable insights.

FINANCIAL REPORTING AND NFCG

During the year, CII continued to propagate a strong message about adopting the highest of compliance standards in making financial disclosures. The philosophy that a true and fair view of the company's affairs must be available to stakeholders, including shareholders, potential investors, consumers and the Government was given a thrust. CII also advocated, with both the Government as well as the Industry, the need for robust accounting and auditing standards, with fair disclosures of financial information. A series of recommendations, to help strengthen financial reporting, were submitted to the Government.

FINANCIAL REPORTING

During the year, efforts were made to identify and address issues related to implementation of the Indian Accounting Standards. The CII National Committee on Financial Reporting engaged with the relevant authorities on a range of issues impacting the Industry.

Four subgroups, constituted under the Committee, took forward the Financial Reporting agenda during the year. These included the sub groups on Indian Accounting Standards, International Accounting Standards, Accounting Issues in Non-Ind AS applicable companies and one on Companies Act, SEBI LoDR Regulations and related legislations. The deliberations of these subgroups highlighted issues related to multi-national accounting firms, Exposure Draft (ED) on IndAS 116, leases, and the MAT implications of certain tax neutral transactions under the IndAS regime. Suggestions were made for better functioning of the MCA21 System, introduced by MCA, with a view to providing easy and secure access to its services in anywhere – anytime mode. Inputs and suggestions were shared on the discussion paper on 'Financial Instruments with Characteristics of Equity' issued by the International Accounting Standards Board (IASB) to the Institute of Chartered Accountants of India (ICAI).



From L to R: Ramesh Subramanyam, Chairman, CII National Committee for CFOs and Chief Financial Officer, The Tata Power Company Ltd; Dr Ajit Ranade, Group Executive President & Chief Economist, Aditya Birla Group; Leo Puri, Chairman, CII National Committee on Financial Markets; P R Ramesh, Chairman, CII National Committee on Financial Reporting and Chairman, Deloitte Haskins & Sells LLP; S S Mundra, Former Deputy Governor, Reserve Bank of India and Sunil Mehta, Chairman, Punjab National Bank and Chairman & MD, SPM Capital Advisers Pvt Ltd at the 11th CFO Summit in Mumbai

CFO COMMITTEE

The CII National Committee for CFOs, comprising senior members of the finance, taxation and audit professionals, deliberated on key issues affecting the Industry. The Committee focused on risk management, mergers & acquisitions, valuations, IBC, cyber security regulations, relationship of CFOs with Boards and audit/ other Board committees.

The Annual Summit for CFOs took cognizance of the issues facing the global CFO community in the light of

new technologies, volatile and ever-changing regulations and structures, geo political shifts, impact of global regulations on Indian companies. Given that India is not the only country facing the recent headwinds to economic growth, the Summit was themed 'Navigating Business in a Turbulent World'. The Summit focused on various challenges facing the CFOs/CXOs and looking at the solutions. Some of the topics included impact of global regulations on the Indian economy, geopolitical shifts, business and regulatory disruptions, inbound and outbound investments and risk management & mitigation.

National Foundation for Corporate Governance

The National Foundation for Corporate Governance (NFCG), set up in the PPP mode in 2003, aims to foster a culture of corporate governance both at the corporate as well as the Industry level. To build this culture, 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 (ICoAI), the Indian Institute of Corporate Affairs (IICA) and NSE. CII serves as the Secretariat for NFCG since its inception.

Accredited management institutions and partner institutions found support from NFCG in over 280 programmes and 35 research studies on corporate governance and related subjects. Some of the partner institution initiatives included the National Seminar on Corporate Governance by ICAI, Workshop on Draft National Guidelines on Social, Environmental & Economic Responsibilities of Business, the Consultation on Legally Binding Treaty

by IICA, the PSE Summit and a session of Public Sector Enterprises with MCA & SEBI.

Accredited institutions' programmes supported during the year by NFCG ranged from the Board orientation programme for directors, the workshop on ERM and conferences on corporate law, corporate governance & the Companies Act, 2013.

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 catalyzed through a variety of initiatives.



P P Chaudhary, Minister of State, Ministry of Corporate Affairs at the National CSR Summit 2018 in New Delhi. From L to R: Seema Arora, Deputy Director General, CII; Raghupati Singhania, Chairman, CII National Committee on CSR and Chairman & MD, JK Tyres and Yasmin Ali Haque, Country Representative, UNICEF India

PUBLIC POLICY

CII continued to create forums for Industry, policymakers and parliamentarians to discuss and deliberate on important policy and developmental issues. The CII Public Policy Council organised multiple roundtables with Members of Parliament (MPs) and had several call-on meetings to drive the agenda.

ENGAGEMENTS WITH MPs

Statewise Roundtables

State specific interactions with MPs from Assam, Chhattisgarh and Jammu & Kashmir were organised. Presentations were made on the developmental roadmap focussed on social indicators namely education, health, rural development, skills and livelihood. Discussion with 10 MPs from these States revolved around industrial development, GST implementation, logistics & connectivity and good governance.

Sectoral Roundtables

Issues pertaining to the power, sports and infrastructure & energy sectors were discussed at three separate Roundtables focused on each of these sectors.



Dr Jitendra Singh, Minister of State (I/C) for Development of North Eastern Region, Minister of State for Prime Minister's Office, Ministry of Personnel, Public Grievances and Pensions, Atomic Energy and Space along with Industry Leaders from Jammu & Kashmir

At the Roundtable on Power Sector, that saw participation of 11 MPs across party lines, the discussions centered around building a roadmap for revival of stressed assets, addressing the credit squeeze, impact of RBI notification on NPA classification, state level regulatory issues and DISCOMS' health.

The Roundtable on Sports deliberated on creating a roadmap for developing sports as an integral part of school curriculum and ways to incentivize youth participation in sports. Developing sports infrastructure through PPP, particularly in rural India, was deliberated at length.

The Infrastructure & Energy sector is facing liquidity crunch, mounting stressed assets, coal allocation issue and revival of gas based power plants. The sectoral Roundtable, while deliberating on these issues, also outlined possible measures and Government interventions required to address these challenges.

Parliamentary Standing Committee Meetings

Engaging with about 60 MPs, CII put forth Industry views on various subjects to the concerned Parliamentary Standing Committees. These Committees are important high level forums available to apprise the policy makers on issues faced by the Industry. Challenges & opportunities with respect to export of organic products, the impact of banking misappropriation on trade & Industry and the impact of Chinese goods on Indian Industry were deliberated on with the Committee on Commerce. CII also deposed before the Committee on Labour on subjects such as safety, security, protection & welfare of broadcasting Industry workers. Concerns related to the Credit Linked Capital Subsidy Scheme (CLCSS) were shared with the Committee on Industry. A deposition was made before the Standing Committee on Subordinate Legislation on the revised framework for resolution of stressed assets.



From L to R: MPs Harish Dwivedi; Narendra Sawaikar; Heena Gavit; Jagdambika Pal; Ranvijay Singh Judev; R K Jena; Dinesh Trivedi; Hari Babu; Vikas Mahatme and Manish Gupta Interacting with Industry Leaders from Power Sector at the Energising India Conference in New Delhi

Meetings with MPs and Political Leaders

MPs and political leaders were briefed about CII's initiatives through one-on-one meetings. Their views were also elicited on possible initiatives that CII could undertake in the future.

During these meetings extensive discussions were undertaken on the possible Electoral Reforms, arrived at by CII after seeking stakeholder inputs. The document on Electoral Reforms draws up a roadmap of changes necessary in the rules related to conduct of elections in India. Some key suggestions include introduction of simultaneous elections, reform of election funding rules, appointment of officers to the Election Commission and categorization of national parties.

CII prepared a suggested election manifesto centered around the seven core elements of CII's India@75 campaign-economy & business, moral leadership, governance & public administration, education, skills & employment, agriculture, rural economy & health, manufacturing, infrastructure & services, technology & innovation, urbanisation & sustainable development, arts, literature & sports. These elements were identified through a comprehensive visioning exercise. The Manifesto was discussed with leaders/MPs of various political parties during the meetings.

VOTER AWARENESS INITIATIVES

Given that a robust democracy needs enlightened voters, a countrywide campaign to improve voter awareness was launched in partnership with Election Commission of India (ECI). With the General Election in the offing, CII took up the mantle of forming Voter

Awareness Forums (VAF) to generate awareness on the how, what and where of registration & voting and other aspects of the electoral process.

MEETINGS WITH VISITING DELEGATIONS

CII organised a meeting where a delegation from China, led by Mr Zhu Mingchun, Vice Chairperson of Budgetary Affairs Commission of the Standing Committee of the National People's Congress of China met with three Indian MPs across party lines to discuss how the Union Budget is made in India. CII organized a meeting of the India China Parliamentary Forum, in the Parliament House, where 6 MPs from various parties deliberated on ways to strengthen relationship between the two countries. An interactive session between Indian MPs and Mr Ralph Brinkhaus, Member of the German Federal Parliament (MdB) and Chairman of the Germany-India Parliamentary Group was also organised.



From L to R: Ranvijay Singh Judev, MP; Vishnu Deo Sai, Minister of State for Steel; Chandu Lal Sahu, MP; Kamalbhan Singh Marabi, MP and Kamla Devi Patle, MP interacting with Industry Leaders from Chhattisgarh in New Delhi

TAXATION

During the year, CII took forward discussions with the Government on both direct and indirect taxation reforms. In particular, inputs were provided to the Government constituted Task Force for drafting the new direct tax law. Implementation of the provisions on BEPS and multilateral instruments, effective implementation, administration & structure of the GST Law and anti-profiteering provisions were pushed for.

ADVOCACY

The Pre-Budget and Post-Budget Memoranda, on both direct and indirect taxes, were submitted to the Minister of Finance, and on various occasions Industry viewpoints were shared with the Finance and Revenue Secretaries, as well as other senior officials of the Revenue Department. During the year, submissions made on direct taxes covered, amongst others, challenges being faced with respect to the notification under section 112A as inserted by the Finance Act 2018, clarification on gratuity amendment, proposed amendments to various forms and rules of the Income Tax Rules and TDS provisions for call centres.



Sushil Chandra, Chairman, Central Board of Direct Taxes, addressing Members at the CII International Tax Conference: Keeping Pace with Global Dynamics in New Delhi

Given that India's corporate sector faces one of the highest tax burdens in the world, a submission was made to the Government to unconditionally reduce the corporate tax rate to 25% and then to 18% in a phased manner. This would facilitate ease of doing business. To prevent revenue loss to the exchequer, it was suggested that corporates be given an option to pay taxes at 25%, without availing incentives.

In view of the removal of most incentives, it was recommended that either Minimum Alternate Tax (MAT) be abolished or the rate be brought down to 10% and its levy be restricted to incomes that are taxable under regular provisions. It was further suggested that foreign dividend and SEZs be exempted from MAT, leaving profits in the hands of these companies for investments.

A case was made for the reintroduction of the classical tax system, with respect to dividend distribution tax (DDT). The proposal advocates a simple and transparent system of levying income tax separately on the company and on the dividends received by shareholders. It would promote greater equity in taxing the recipient, while reducing the overall tax burden on companies, avoiding the cascading impact of taxes and eliminating the no-credit challenge faced by foreign investors.

The Government was urged to consider allowing as business expenditure, the mandatory 2% of average profits spent by companies towards CSR projects. Providing suitable tax incentives would strengthen the Industry's resolve towards such projects, ensuring that the country makes progress on the goal of becoming a developed nation.

There is no doubt that GST revenue collections surpassed expectations, to emerge as a potent instrument for boosting the Industry's competitiveness while accelerating economic growth. In a big relief to MSMEs with an annual turnover of INR 1.5 crore, the GST Council allowed filing of quarterly returns.



From L to R: Harishanker Subramaniam, Chairman, CII Core Group on GST & National Leader-Indirect Tax Services, Ernst & Young LLP; S Ramesh, then Chairman, Central Board of Indirect Taxes and Customs; John Joseph, Member (Budget), CBIC and Upender Gupta, Commissioner, GST, Ministry of Finance, at the Interactive Session on One year of GST in New Delhi

To facilitate EoDB, a case was made for applying this rule across enterprises, while the GST can continue to be paid on a monthly basis. The GST Council's real time response to the businesses' expectations was much appreciated by the Industry. The rationalization of rates on most goods & services brought much comfort to the businesses. With GST revenue having stabilized, a rate structure of 2-3 slabs was proposed and the need to further rationalize the 28% category to only include de-merit goods highlighted. This would simplify the process while eliminating uncertainties and also address the inverted tax issues. For building seamless input tax credit availability across sectors, it was recommended that electricity, oil & gas, real estate and alcohol also be brought under GST's ambit.

To help reduce the complexities in compliance of the GST Laws for banks, insurance and telecom sectors having pan India operations, a single and centralized registration process was mooted with the Government. It was also suggested that provisions on inter-state, inter-branch deployment of company employees, fund allocation and reimbursement of expenses be redressed. Other suggestions made with respect to GST compliance included deletion or simplification of provisions of GST payment on advance receipts and under reverse charge mechanism; the Government was also urged to simplify GST returns, matching of invoices and provide seamless input tax credit on priority. Clear guidelines on pricing

and profit calculations under GST for compliance with anti-profiteering provisions were also requested for.

The Industry's challenges related to capital blockage & cash flows arising from delay in refund of accumulated input tax credits due to inverted tax structure and for supply of railways and parts thereof, presently excluded from refund eligibility, were discussed with senior Government officials. It was also recommended that eligibility of input tax credit be restricted to non-business purposes and no reversal be required for supply of free business samples, demo /test vehicles, CSR activities, and investment in securities.

Other recommendations made included making tax on capital goods eligible for refund of accumulated tax due to inverted tax & exports, extending the composition scheme to a large number of services, including job work services. To give a fillip to R&D, clinical trials, healthcare services and hotel & tourism sectors, it was suggested that the Foreign Exchange received by business and intermediaries from overseas principals be considered as export of service and thus be zero rated.

It is likely that divergent rulings on identical issues by Advance Ruling Authorities under different States will fuel confusion over applicability and the tax rates. Reverting to the centralized Authority for Advance Rulings (AAR) will go a long way in uniform rulings.

ACTION

On the completion of one year of GST, an Interactive Session was organised with the Chairmen and senior officials of CBIC and GSTN. During the year, the CII National Committee on Taxation deliberated on the areas of Income Tax Act that needed rewriting. Challenges being faced by trade and Industry with respect to the anti-profiteering provisions were also taken up with the National Anti-Profiteering Authority.

At the International Tax Conference focused on keeping pace with global dynamics, both domestic and international companies interacted with senior Government officials. A thought leadership paper, titled 'Tax Reforms: Keeping Pace with Global Dynamics', was released at the Conference. Members were provided a separate opportunity to get their concerns addressed by leading tax professionals at four exclusive knowledge sessions on the US Tax Reforms and India's GST.



NURTURING COMPETITIVENESS



Centres of Excellence

- › CII Institute of Logistics
- › CII Institute of Quality
- › CII-ITC Centre of Excellence for Sustainable Development
- › CII Centre of Excellence for Competitiveness for SMEs
- › CII Naoroji Godrej Centre of Manufacturing Excellence
- › CII-Sohrabji Godrej Green Business Centre
- › CII-Suresh Neotia Centre of Excellence for Leadership
- › CII-Triveni Water Institute
- › CII-Jubilant Bhartia Food and Agriculture Centre of Excellence



CII CENTRES OF EXCELLENCE

CATALYSING COMPETITIVENESS

ACROSS INDUSTRIES

AGRICULTURE



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

FOCUS - Improve Competitiveness of the Agriculture and Food Value Chain by Catalysing Innovation, Building Capacity and Enhancing Productivity

165

Colleges
Participated in CII
SKA Asia Quiz on
Food Safety Across
10 Asian Countries

4500+

Participants from
200+ Organisations
Attended Workshops
and Trainings on
Post-harvest &
Logistics and Food
Safety & Quality

12

Stakeholder
Awareness Workshops
Across 9 States for
the Promotion of
the Pradhan Mantri
Krishi Sampada Yojna
(PMKSY)

GREEN BUSINESSES



CII-Sohrabji
Godrej Green
Business
Centre
Hyderabad

FOCUS - Foster, Promote and Accelerate Green Practices and Businesses

632

Green Building
Projects
Registered

183

GreenCo
Registrations
and Energy
Audits

187

Products-GreenPro
Certified

LEADERSHIP DEVELOPMENT



CII-Suresh
Neotia
Centre of
Excellence
for
Leadership
Kolkata

FOCUS - Development of Leadership for a New India

914

Future Leaders
Underwent Training

436

Companies
Impacted

10

Training
Interventions

LOGISTICS



CII
Institute of
Logistics
Chennai

FOCUS - Transform India as a Global Leader in Logistics and Supply Chain

4800

Members
Participated in
Training Sessions That
Included Corporate
Training, Skill Training
Development and Educational
Programmes

700

Newly Certified
Supply Chain
Professionals

194

Companies
Participated in the
National SCALE
Awards. 22 New
Warehouses
Certified

MANUFACTURING


CII Naoroji Godrej Centre of Manufacturing Excellence
Mumbai

FOCUS - Foster Pre-eminence and Competitiveness to Create a Global Manufacturing Hub in India

1500+

Members Participated from 700+ Companies in the CoE's Interventions

85

Capacity Building Programmes and 12 In-house Trainings

130+

SME Member Companies Involved

QUALITY


CII Institute of Quality
Bengaluru

FOCUS - Transform Businesses, Share Value, Create Value

265

Companies Advised. 37 Companies Won the BE Awards & Recognitions

3524

Industry Participants Benefitted From 136 Training Programmes, Workshops & Other Activities

18

Technical Experts and a Few Overseas Missions Undertaken

SME COMPETITIVENESS


CII Centre of Excellence for Competitiveness for SMEs
Chandigarh

FOCUS - Drive Business Excellence and Enhance Competitiveness of MSMEs

3018

Participants From 425+ Companies Benefitted From Trainings, Workshops & Other Activities

636

Companies Impacted Through Clusters, Audits, Consulting and Government Supported Projects

916

Million Rupees of Projected Savings From 217 Companies From Clusters, Audits and Consulting

SUSTAINABILITY


CII-ITC Centre of Excellence for Sustainable Development
New Delhi

FOCUS - Advance the Agenda of Sustainable Business Practices in India

1017

Professionals Trained

34

Training Programmes

39

Companies Awarded

WATER


CII-Triveni Water Institute
New Delhi

FOCUS - Water Conservation, Water Efficiency and Wastewater Management

2000

Persons Sensitised. 150+ B2B Meetings Conducted

175

Companies Advised. 21 Water Audits Conducted. 31 Companies Awarded

35

WATSCAN Projects on Water Security. Water Planning for 20 Drought Prone Districts Completed

CENTRES OF EXCELLENCE



CII INSTITUTE OF LOGISTICS

India's logistics sector is poised for accelerated growth, led by the economy's revival, increased need for transport infrastructure, e-commerce penetration, and Government initiatives such as Make in India. Estimated to have grown at 15% over the last five years, the logistics sector also boosts growth of a wide array of affiliate services, such as transportation, storage, distribution and integrated / allied services.

While the sector has been clocking in steady growth over the past few years, 2018 was a landmark year, as it marked the beginning of a 'logistics excellence movement' in the country. In this context, CII Institute of Logistics (CIL) initiated dialogues with the Central and State Governments, Industry, international agencies and the academia. The movement was triggered by the need for defining and implementing key actions to reduce indirect logistics costs, encourage exports & employment and attract investments in the sector.

ADVOCACY

CIL continued to create platforms for the Industry to gain insights into emerging trends, address challenges of national importance and bring world class practices to logistics & supply chain management in the country. The Institute endeavored to enable the Industry to cut down transaction costs, enhance efficiency & profitability and implement solutions to macro level challenges.

In 2018, a Logistics Standards Committee was formed towards developing a contemporary image for India's logistics sector and creating awareness about the opportunities for stakeholder value creation. CIL also initiated a Supply Chain Maturity Model for transformation through non-linear leaps. Since 2004, CIL has certified over 7.60 million sq ft of warehousing space in India (as on December 2018). A CIL knowledge group comprising over 300 supply chain experts, provided a compelling ecosystem for upskilling logistics professionals. Total Cost Management initiatives for manufacturing and services sectors were continuously driven to enhance the sector's competitiveness.



N Sivasailam, Special Secretary and Anant Swarup, Joint Secretary, from the Department of Logistics, Ministry of Commerce and Industry along with R Dinesh, Chairman, CII Institute of Logistics Advisory Council and the SCALE Award Winners 2018 in Pune



The first batch of students from Tughlakabad, Delhi, who successfully completed skill training and were placed in jobs

ACTION

The Institute continued to work with stakeholders and engage with international Industry players to bring the global best practices to the country. With a focused approach to building capacity, CIL trained 1900 youth from the underprivileged sections of society through programmes under Government schemes. These included the SDTP scheme of the National Backward Classes Finance Development Corporation (NBCFDC), National Scheduled Classes Finance Development Corporation (NSFDC), Andhra Pradesh State Skill Development Corporation (APSSDC) and CONCOR CSR. Existing workmen of the Northern Railways and Ex-Servicemen residing in Bhopal were up skilled. Discussions for a Logistics National Apprenticeship Promotion Scheme were initiated with the Logistics Sector Skill Council.

Education

- CIL continued to deliver the online certification programmes in logistics management, supply chain management, competitive supply chain and shipping management
- About 500 students from 10 educational institutions were certified after undergoing a short term course in logistics and supply chain management
- On successful completion of two batches of a course for senior transport professionals, CIL was granted a 5 year contract from the UN for the same course
- The MoUs with 10 existing educational institutions were renewed and another 10 MoUs were signed for continuation of the logistics programmes.

Training / Certification

- The training & certification programmes on supply chain, export-import, blockchain, leadership and artificial intelligence continued to receive encouraging Industry participation, with about 600 professionals undergoing these trainings
- The Supply Chain Management Executive Certification Programme (SCM EXE), enabled about 500 supply chain professionals to enhance their competence to global standards
- Over 200 supply chain professionals attained the advanced supply chain certification-SCM PRO.

WAREX

CIL's Warehouse Certification Programme-WAREX, assesses the parameters and functions essential to manage an efficient warehouse such as administration, infrastructure, intra-structure, technology, operations, risk & safety. The Warehouse Certification helps the assessee in developing a roadmap for future growth, set benchmarks and outline an improvement plan. During the year, 22 facilities were certified under WAREX.

Supply Chain and Logistics Excellence (SCALE) Awards 2018

Continuing to encourage competitiveness in the supply chain sector, the 5th SCALE Awards saw participation of 194 companies that have achieved significant improvement in their supply chain and logistics function. The awards were aimed at accelerating the development of a world class supply chain by adoption of global best practices, sharing knowledge and providing a fresh perspective to the Industry.

CII INSTITUTE OF QUALITY

**INSTITUTE
of QUALITY**
(Sponsored by ABB Limited)

CII Institute of Quality (CII IQ) continued to partner with international and national organisations, engage with stakeholders, network with domain experts to build capability and share best practices and align with Members' expectations. A team of technical experts across four verticals brought significant value addition to the Industry in terms of competitiveness building through Business Excellence, Total Productive Maintenance, Quality Metrology & Standards and Lean Six Sigma activities.

BUSINESS EXCELLENCE

In pursuit of the movement on business excellence, CII IQ continued to build an enabling ecosystem to recognise excellence by building capability, helping organisations set systems in place, and enabling them to create benchmarks in India. CII IQ is also a member of the Global Excellence Council (GEC). The CII EXIM BANK Award for Business Excellence, 2018 concluded with Bharat Electronics Ltd, Bengaluru winning the coveted Award and the commendation for Role Model Organisation. The companies that challenged the Award and participated in the Maturity Assessment Programme adopted the Business Excellence framework for holistic improvements using third-party perspectives to work on blind spots.

Based on time-tested business excellence and maturity models, the Responsible Export Organisation-Certification Scheme was launched providing a comprehensive assessment for assessing organisations' systems on 10 critical elements covering practices of governance, management, operations and consistency in results.

CII IQ was also the assessment agency for administering the PM's Trophy for Integrated Steel Plants for the performance year 2017-18. Plants of nine participating organisations were assessed based on the EFQM Excellence Model Enabler Criteria Requirement.

During the year, platforms to help build a culture of excellence in the Industry were strengthened. The Business Excellence Conclave, coupled with a learning conference, focused on recognising organisations that moved forward on the excellence journey. Capacity building efforts were enabled through new workshops on Quality Leader to Strategic Quality Leader and Right Metrics Programmes. The competitions on Safety Practice and Excellence Practice encouraged companies to share their best practices. BE Star recognitions and the SMB Performance Excellence Recognitions were handed over to practicing companies



From L to R: V Narasimhan, Past Chairman, CII TPM Club India and Executive Director, Brakes India Ltd; Suresh Krishna, Past President, CII, Founder Chairman, CII TPM Club India and Chairman, Sundram Fasteners Ltd; N Kumar, Past President, CII and Vice Chairman, The Sanmar Group and Yogesh Munjal, Past Chairman, CII TPM Club India and MD, Munjal Showa Ltd at the 20th Anniversary celebrations of TPM Club India in Chennai during the 18th TPM National Conference 2018



From L to R: R Mukundan, Chairman, CII Institute of Quality Advisory Council & CII National Committee on Environment and MD & CEO, Tata Chemicals Ltd; Anil Zainulbhai, Chairman, Quality Council of India; Dilesh Patel, Founder & CEO, The eVSM Group and David Rasquinha, MD, EXIM Bank of India at the 2nd BPM Asia Conference 2018 in New Delhi



Shashi Bhushan, CTO- Business & Technology Services, Tata Consultancy Services and Kamal Bali, MD, Volvo India at the Annual KN Shenoy Oration during CII IQ's Anniversary celebration in Bengaluru

under the newly instituted Business Excellence Maturity Assessment Programme. Assessments of organisations competing for the Customer Obsession Award and the India region Most Innovative Knowledge Enterprise (MIKE) Awards were also facilitated by the Business Excellence team during the year.

TOTAL PRODUCTIVE MAINTENANCE

Amongst the many competitiveness philosophies, tools and techniques adopted by the Indian Industry in the 1990's, Total Productive Maintenance (TPM) proved to be highly successful. With the current re-orientation in Indian manufacturing, echoed through the clarion call of Make in India, TPM's role, efficacy and contribution in improving Indian shop floor practices is in sharp focus.

CII IQ's TPM Club India recognised the stellar contributions of its past Chairmen Mr Suresh Krishna, Chairman, Sundram Fasteners Ltd; Mr Yogesh Munjal, Managing Director, Munjal Showa Ltd and Mr V Narasimhan, Executive Director, Brakes India Ltd at the 18th TPM National Conference. This Conference marked the launch of the Club's 20th Anniversary, pursuant to the signing of the MoU with Japan Institute of Plant Maintenance (JIPM), Japan in March 1998. Sessions on robust engineering, value engineering, TPM footprint in Indian Industry, HR and out of box thinking set a new direction for TPM.

Of the 43 Indian companies that successfully challenged the JIPM TPM Awards, 21 were supported by CII IQ. India continued to maintain its status of having the highest number of TPM Awards outside of Japan. This year's Champions' Competition received participation from 79

teams, of which 15 were declared winners. The winners in each sub category, best among the best winners received the Dr Surinder Kapur Endowment Award, sponsored by the Sona Group- a cash prize of INR 50,000.

The 1st TPM / TQM Manufacturing Study Mission to Japan was organised along with JIPM to help Indian companies learn by seeing TPM and TQM Principles in practice while also participating in the JIPM TPM Award Ceremony. Yet another Study Mission to Nagoya, Japan, organised in collaboration with JMA Consultants Inc (JMAC), helped stimulate ideas and share best practices through real-life scenarios and learning. A Best Manufacturing Practices Mission for the AIDC- South Africa delegation to India provided a first-hand experience on India's manufacturing improvement programmes and showcased best manufacturing practices.

Various masterclasses were held to build capacity on techniques such as value engineering, pull system, AI & IoT to enable companies to challenge the TPM Awards & sustain TPM practices in the awarded companies.

QUALITY, METROLOGY & STANDARDS

CII IQ continued to build capacity in quality, risk & process management through application of standards, frameworks, tools, benchmark and research studies among manufacturing, service and governance sectors.

As an institution involved in building policy frameworks for standards, conformity assessment & technical regulations, and facilitating their implementation, CII IQ organised the Indo European Conference on



From L to R: Pranjul Jha, Vice President, Q3Edge Consulting; Roger Tregear, International BPM Consultant; Dr Raj Singh, Vice Chancellor, Ansal University; A Venkataram, MD, BSI India; Anupam Kaul, Principal & Head, QMS, CII Institute of Quality and Amit Chauhan, CEO, Q3Edge Consulting at the BPM Asia Conference in New Delhi

Standards and Emerging Technology in collaboration with the Seconded European Standardization Expert for India (SESEI). The conference sought to strengthen the existing dialogue between India and Europe towards standardization and related policies on role of ICT in smart cities & cyber security, automotive covering electric mobility & intelligent transport systems (ITS) and smart energy including smart grid, smart meter, LVDC, micro grid amongst others.

The Workshop on Water and Sanitation Systems in India was organised along with American National Standards Institute (ANSI) and the US Trade and Development Agency (USTDA)'s US-India Standards and Conformance Cooperation Programme (SCCP), Phase II and was coordinated by ANSI alongwith with CII and the Bureau of Indian Standards (BIS). Competitions on topics such as Statistical Process Control Towards Zero Defect and Low Cost Automation encouraged cross learning in the Industry. The BPM Asia Conference, held jointly with Q3Edge Consulting, discussed how businesses can be transformed through process-based management.

LEAN SIX SIGMA

CII IQ continued its focus on building change leaders for operational excellence and driving the continuous improvement programmes in their organisations using the lean & six sigma methodology. This was propelled through several training programmes. The best

practices competition, where companies showcased their successful practices in lean and six sigma, were a learning opportunity for the participants.

In the Certified Lean Expert programme, practicing organisations provided insights into lean methodologies and application of tools & methods to augment classroom learning. The Six Sigma Green Belt and Black Belt level certification programmes, followed by application through a real time improvement project, emphasised the learning and its application.

ACTION

The 26th edition of CII's Quality Summit set the tone for Indian companies to achieve global competitiveness through benchmarking. During the Summit, a MoU was exchanged with IR Class Systems and Solutions for building assessment capabilities and with Munjal Showa for setting up of a TPM Experience Centre. About 500 participants representing 126 manufacturing and services companies witnessed the felicitation of 16 organisations with the CII-EXIM Award for Business Excellence-2018. The award was instituted in 1994 along with EXIM Bank, for recognising visionary leadership, future focused strategy, committed employees and a strong brand leadership. CII IQ celebrated its 17th Anniversary, with the delivery of the Annual KN Shenoy Oration and a conference on Artificial Intelligence-Machine Intelligence for the Real World.

CII-ITC CENTRE OF EXCELLENCE FOR SUSTAINABLE DEVELOPMENT



CII-ITC Centre of Excellence for Sustainable Development (CESD), nurtures companies with a view to enabling them to compete, expand opportunity and excel in the current dynamic business environments. With this objective, the centre continued to campaign for the adoption of sustainable business practices by Indian companies. The agenda was driven through policy advocacy, thought leadership & advisory, and in-company capacity building efforts. CESD continued to pursue its mission of encouraging and accelerating innovative ideas and solutions for sustainable value creation by businesses and their stakeholders.

ADVOCACY

CII-NITI Aayog Cleaner Air, Better Life Initiative

The Cleaner Air, Better Life Initiative followed a multi-faceted approach towards improving Delhi NCR's air quality. A CII Task Force on Making NCR Less Polluted was constituted to address the annual episodic events of declining air quality in Delhi, NCR and its neighborhood. The Task Force aims to strategize and organise Industry action towards a solution to this challenge. Reports on Biomass Management, Clean Fuel and on Clean Transport, released jointly with NITI Aayog, and a pilot village level programme for Farm Biomass Management were two key projects under this initiative. The project, covering about 15,000 acres of farmland in two Punjab

districts, aims to facilitate pooling of resources by India Inc to develop smart technological alternatives to burning farm residue. Industry and the Government have partnered under this effort to support the farming community to adopt cleaner and climate smart practices.

Environment and Forest Clearance

In August 2018, MoEFCC launched PARIVESH, India's single-window integrated system for environment, forest, wildlife & CRZ clearances, primarily for the Industry. A series of webinars to create awareness about PARIVESH and guide businesses on its usage is proposed to be conducted in collaboration with MoEFCC. A unified EIA notification for all intermediary amendment notifications and office memorandums, released after EIA notification 2006, is also under preparation, in consultation with MoEFCC.

Working Group on Plastic Waste Management

Being the Industry interface with the Ministry of Commerce and Industry on Ease of Doing Business, CESD organised an interaction with DPIIT (formerly DIPP) on the Industry's progress towards initiating Extended Producer Responsibility (EPR) projects. A representation was submitted to Chairman, Maharashtra Pollution Control Board (MPCB) on the key challenges related to the plastic policy.

Industry Members have found the Central Pollution Control Board's (CPCB) online system for application for registration under Plastic Waste Management Rules 2016 difficult to interpret. The Chairman, CPCB was requested to organise a joint webinar to create awareness and bring clarity about the system.



From L to R: Chandrajit Banerjee, Director General, CII; Dr Harsh Vardhan, Minister for Environment, Forest & Climate Change, Science & Technology and Earth Sciences; Karmenu Vella, Commissioner for Environment, Maritime Affairs and Fisheries, European Commission and Sanjiv Puri, MD, ITC Ltd at the 13th Sustainability Summit in New Delhi

ACTION

Business and Biodiversity

In 2018, 22 IBBI Members submitted their disclosure reports on the IBBI 10 Point Declaration to showcase commitment towards conservation and sustainable management of biodiversity in business operations. The article on tools & best practices for mainstreaming biodiversity in businesses of eight members of the



From L to R: Yuri Afanasiev, UN Resident Coordinator; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises; R K Singh, Minister of State (I/C), Power and New & Renewable Energy; Amitabh Kant, CEO, NITI Aayog; Chandrajit Banerjee and Dr Ashok Kumar Jain, Adviser, NITI Aayog at the Government and Business Partnership Conclave in New Delhi

Convention on Biodiversity's (CBDs) Global Platform for Business and Biodiversity, including IBBI, was published in the International Journal of Biodiversity by Taylor & Francis. Few Indian businesses presented their biodiversity conservation and sustainable use initiatives at the CBD COP 14 in Egypt.

Climate Change

CESD is the knowledge partner for CAP 2.0°, a new recognition and learning product, being instituted by CII with DSM's support. This recognition aims to raise the level of Industry action on climate change and move towards a science-based target setting. Based on a CII climate-maturity model and using the principles of business excellence framework, it helps businesses contract climate risks and exploit market opportunities. Stressing the importance of building a climate resilient strategy and incorporating climate change risk analysis by decision makers, the product will persuade Indian Industry to adopt a holistic approach to climate change.

CSR Tracker

The CII Annual CSR Tracker 2017 was released by Shri Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation at the CII Annual Session 2018 (AGM), reported that 1522 BSE-listed companies spent INR 8897

crore, or 92% of their CSR budget. This is an increase of about 9% in CSR spends in FY17 as compared to FY16.

Business for Human Rights

The key aspects of the development of National Action Plan (NAP) and process for business and human rights (B&HR) in India were discussed at a Roundtable and documented. Conducted in collaboration with the Business and Human Rights Resource Centre (BHRR), it focused on the precursor to developing a National Baseline Assessment (NBA).

Corporate Reporting Consortium

Based on Member feedback, the Integrated Reporting Initiative was upgraded to the Corporate Reporting Consortium (CRC) during the year. The CRC brings together all non-financial disclosure initiatives under one umbrella. The aim is to engage with regulators to create an all-inclusive ecosystem for standardised and consolidated corporate reporting, to facilitate future-proofing through improved quality of disclosures and creating sustainable value for stakeholders. The CRC members decided to submit a 'Reporting Framework' to the regulator and jointly develop a 'Benchmarking Tool' to assess corporate reporting disclosures, highlight best practices through a yearbook and also design a rating or a ranking method.

Government and Business Partnership Conclave: Fast Tracks for the 2030 Agenda: Water, Energy and Green Industry

The three core areas of water, energy & green industry, identified as fast tracks for the 2030 Sustainable Development Goals (SDGs) Agenda, were deliberated at the B2G Partnership Conclave on SDGs, organised alongwith NITI Aayog and the UN. A MoU for a three-year partnership on SDGs was signed with NITI Aayog to showcase sustainability efforts of the Indian businesses, increase awareness amongst them, share best practices and build a tracking mechanism for further improving Industry engagement to achieve SDGs by 2030. A report outlining Indian solutions for the world to achieve SDGs, also highlights the targets and business implications thereof with respect to a few Industry sectors. The report, with the help of Industry specific examples, discusses how companies incorporate the SDGs framework in their business strategies and work towards their achievement.

Circular Economy: A New Source of Competitiveness

CESD is developing a programme on Circular Economy (CE) and Sustainable Public Procurement, to provide guidelines for Indian CEOs to incorporate circularity in their businesses and demonstrate the link to competitiveness. A CE guidebook for CEOs, that establishes the concept of CE and describes a few business models was launched at the 13th Sustainability

Summit. Going forward, CESD will develop knowledge products spanning law, information resources and guidebooks; conduct sector deep-dives, develop roadmaps based on life-cycle thinking and also undertake policy advocacy from the perspective of taxation, skill and jobs.

Representatives from the Industry and business associations from 16 countries were present at the European Union Circular Economy Mission hosted at the Sustainability Summit. This mission aims to create awareness about the circular economy (CE) concept and mobilise demand amongst businesses in India. Ideas on policies and practices on Resource Efficiency (RE) were discussed at a series of high-level political and business meetings between India and EU.

CII and UN Environment’s MoU for Coherent Implementation of the Environmental Dimension of Sustainable Development

A MoU for coherent implementation of environmental dimension of sustainable development was signed with the UN Environment. Covering all major areas of interest, common to both organisations, the MoU provides a framework of cooperation on environment, climate change, renewable energy, energy efficiency, resource conservation & management, water sanitation, smart cities and urban infrastructure. Aligned with the Beat Plastic Pollution theme, the CII-UN Environment, #Unplastic Initiative will begin with Industry commitments on actions to curb plastic pollution.



Erik Solheim, Executive Director, UN Environment and Chandrajit Banerjee, Director General, CII signing MoU for coherent implementation of the environmental dimension of sustainable development. Standing behind: Atul Bagai, Head, UN Environment Programme Country Office, India and Satya S Tripathi, Assistant Secretary-General, UNEP in New Delhi

CII CENTRE OF EXCELLENCE FOR COMPETITIVENESS FOR SMEs



Centre of Excellence
for Competitiveness for SMEs

Considering the Government's long-standing aim of boosting the manufacturing sector's share in the nation's GDP to 25% by 2025, the spotlight is on improving the efficiency and output of MSMEs engaged in manufacturing. In addition, the global focus on technology & innovation and its ever increasing impact on manufacturing enterprises, makes it imperative for Indian MSMEs to be empowered with technologies being adopted by the global Industry. While Indian MSMEs are taking steps to become increasingly competitive, they are also faced with the challenges of dealing with the innovative technological trends, such as the Fourth Industrial Revolution.

In this backdrop, the endeavour of the CII Centre of Excellence for Competitiveness for SMEs (CII CFC) is symbolised in the statement that competitiveness is about re-looking at the business every day. It means being truly world class at all points of time; it is not about leading today, it is about tomorrow. Led towards this vision by the Chairman, Mr Shreekant Somany, the Centre works as a game changer by handholding MSMEs towards a rapid and sustainable growth roadmap.

ADVOCACY

The CII CFC addresses the needs of MSMEs for achieving excellence in manufacturing and integrating with global supply chains. The Centre also guides and mentors MSMEs in developing their organisational ecosystems for driving change and adopting newer technologies. By helping MSMEs enhance their overall competitiveness through its services on manufacturing excellence, energy efficiency, human resource & skill development and corrosion management, the Centre endeavoured to build world class 'future ready' MSMEs. This agenda was driven through the CII cluster approach, consulting assignments, sharing of best practices, workshops and training programmes.

ACTION

Building Sustainable Competitiveness

The Centre continued to guide the Industry through various business models of manufacturing to help them build competitiveness based on their level and need. Adopting the cluster approach, the CoE enabled companies to develop a Zero Defect, Zero Effect



From L to R: Yogesh Munjal, Chairman, CII Clusters for Competitiveness and MD, Munjal Showa Ltd; Shreekant Somany, Chairman, CII Centre of Excellence for Competitiveness for SMEs and Chairman & MD, Somany Ceramics Ltd; R C Bhargava, Chairman, Maruti Suzuki India Ltd; S N Tripathi, Secretary, Ministry of Parliamentary Affairs; Vipin Sondhi, Summit Chairman and MD & CEO, JCB India Ltd; Pikender Pal Singh, Senior Director & Head, CII-CFC and Raman Sobti, COO, KPMG India at the 11th National Competitiveness & Cluster Summit in New Delhi

approach and achieve improvement in productivity, quality, cost, delivery, safety & morale and profitability. Many companies registered 70 to 100% reduction in process rejections and customer complaints. The Cluster Roadmap also helped companies build capability to ensure error free and mistake free design, procurement, manufacturing & dispatch to end users. Several factories were transformed to achieve Hospital Clean & Garden Green status.

Building Next Generation Manufacturing

In pursuit of building next generation manufacturing in the country, the Centre continued to enable companies to achieve excellence in manufacturing. Over 200,000 abnormalities were identified and solved to create a Zero Defect Quality Mindset. Other programmes under this included resource optimisation through five senses in manufacturing, system for keeping plant in order, eliminating compressors, hammers, air guns, racks, pallets, woods in the factories. Several operators were skilled to achieve big press machine changeover in 17 seconds.

The Conclave on the Indian Production System (IPS), led by Mr C Narasimhan, Mentor, CII Cluster Programme, aimed at creating awareness about this innovative concept. Companies shared their best practices and implementation of five senses, tool engineering, total lean machine manufacturing and low cost automation.

International Interventions

In 2018, Indo-German Manager Training Programme (IGMTP) once again provided an opportunity for Indian executives to get training on building bilateral business relations and economic cooperation with German companies. Managers from companies with foreign trade potential underwent the one-month programme in Germany which helped them develop their management expertise and gain insights into German business practices. The programme facilitated export & import deals, technology transfers, collaborations and joint ventures.

Promoting Energy Efficiency Mission

Mission energy efficiency was given a thrust through stakeholder sensitization and by providing competitive and energy efficiency enhancing technological solutions. EETech, a technical conference, highlighted the possibilities of driving energy efficiency through



From L to R: Gurpreet Chugh, MD, ICF India; Shreekant Somany; Abhay Bakre, Director General, Bureau of Energy Efficiency, Ministry of Power and Arun Bhatia, Conference Chairman & MD – India region, United Technologies – Climate, Controls & Security at the 3rd CII EETech – Technical Conference & Exposition on Energy Efficiency, Environment & Technology in New Delhi

innovations & collaborations. Latest standards in energy efficient equipment, systems & processes, automation, renewable energy, industrial application and other important aspects essential to making India an energy-self-sufficient country were discussed at the Conference.

Working as an implementation partner with stakeholders such as Bureau of Energy Efficiency, World Bank, SIDBI, and UNIDO amongst others, CII implemented energy efficiency projects in MSMEs.

Under the SIDBI-WB Project, about 100 MSMEs from Punjab & Himachal Pradesh are together expected to save around INR 4000 Lakhs by implementing the energy efficiency solutions offered. The BEE-UNIDO project also benefitted over 60 hand tool units in Punjab and Rajasthan. Encouraged by the energy efficiency results achieved by SMEs, the BEE awarded to CII an innovative project titled Implementation of Energy Management System as per ISO 50001 Standards.

World Class Energy Efficiency Initiatives

The 1570 energy audits, conducted both in India and abroad, helped realise annual recurring savings worth INR 3631 million. Training programmes on energy efficient systems, energy efficient design stage considerations, industrial & electrical safety were conducted during the year. A world class energy efficiency initiative is being promoted in companies from auto, auto components, engineering, pharmaceutical & chemical, food processing, commercial buildings, FMCG, refinery, rice mills, textiles, pulp & paper, power and sugar sectors.



From L to R: R D Udeshi, President – Polyester Chain, Reliance Industries Ltd; Smriti Irani, Minister of Textiles and Dr Kavita Gupta, Textile Commissioner at the Texellence Conference in Mumbai

Applauding the Industry’s Energy Efficiency Efforts

The National Energy Circle Competition continued to encourage, support and applaud the industry’s efforts towards improving energy efficiency and reducing consumption of natural resources. The success stories shared by companies, technology providers and institutions, inspired others to follow the right process of internalizing the concepts.

Corrosion Management

CII continued to create awareness about corrosion and its adverse effects on the country’s pace of development. With corrosion audits, awareness workshops and handholding, the Industry was able to reduce significant losses arising from corrosion. The automotive sector was apprised of the corrosion related issues, latest developments and solutions for the sector. While 500 Industry professionals underwent training on managing corrosion, a Corrosion Manager Course and Paints & Coating Manager Course were also developed during the year.

Empowering Human Resources

SME entrepreneurs were sensitized about the possibility of business value creation through human resource optimisation and adoption of ethical and sustainable practices. Companies were counselled on defining and building transparent HR processes, performance matrices & reward systems, learning & development culture and total employee involvement with seamless use of technology. The objective of these initiatives is to enable SMEs to move from Transactional HR to Transformational HR. CII National HR Circle Competition



From L to R: Vijay A Pankhawala, Deputy Director – Business Development and Corporate Planning Department, ARAI; Yatinder Pal Singh Suri, MD & Country Head, Outokumpu India Pvt Ltd; P M Bantwal, MD, Suprabha Protective Products Pvt Ltd and Neeraj Munjal, MD, Shivam Autotech Ltd at the Conference on Addressing Corrosion in Auto & Auto Component Industry in New Delhi

applauded the Industry’s efforts on setting up world class HR practices and enhancing employee productivity.

Enhancing Reach and Networking

Key Parameters (2018-19)	
Savings achieved from 30+ energy audits (INR Million)	656
MSMEs impacted through Government & other agencies’ supported projects	415
Number of companies handheld through 15 ongoing clusters for competitiveness	105
Best practices competition case studies received	1625
Training programmes & workshops	45
Industry participants from over 425 companies benefitted from trainings workshops & other activities	3018
Savings achieved by 100+ companies from 15 ongoing clusters/assignments (INR Million)	266

Adopting new ideas and updating the processes constantly is the only way to gain an edge over competition in a dynamic marketplace. In this light, CII continued to provide learning platforms to MSMEs for enhancing their competitiveness through technical conferences, training programmes, competitions on manufacturing excellence, energy efficiency, human resource management and corrosion management. More than 3000 Industry delegates, from over 400 companies, benefitted from these activities conducted during the year.

CII NAOROJI GODREJ CENTRE OF MANUFACTURING EXCELLENCE



Naoroji Godrej Centre of Manufacturing Excellence

The significance of manufacturing for the Indian economy has been long recognised. While the Government has initiated several mission mode programmes to encourage manufacturing in India, Industry has been making concerted efforts to enhance its competitiveness. A highly competitive environment promotes the well-being of enterprises and stakeholders involved, both directly and indirectly, by boosting productivity across levels. A competitive ecosystem also has the potential to create a large number of jobs in the manufacturing sector. The CII Naoroji Godrej Centre of Manufacturing Excellence (CII CME) promotes and fosters pre-eminence and competitiveness to create a global manufacturing hub in India. The Centre's initiatives are aimed at:

- Incentivizing manufacturing jobs
- 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' manufacturing.

ACTION

Capacity Building

CII CME aims to build competitiveness in India's manufacturing sector through capacity building programmes. The Centre drives its agenda through training programmes, building capacity in companies as well as focusing on core of manufacturing through initiatives in industrial safety, welding & welding technologies and fluid power technology. Over 1500 participants from more than 700 companies benefitted from the 85 training sessions aimed at fostering manufacturing competitiveness. About 200 professionals from 9 companies learnt business analytics techniques, value engineering, supply chain, communication skills, design of experiment and manufacturing excellence practices. The 4th Batch of the Gold Sash Manufacturing Excellence Programme was conducted during the year.

The Advanced Manufacturing Programme and Industry 4.0 Implementation Workshops, organised under the Future of Manufacturing Initiative, saw participation and involvement of Member companies from across the country.



From L to R: Anil Verma, Chairman, CII Task Force on Industrial Safety and President and Executive Director, Godrej & Boyce Mfg Co Ltd; Rupark Sarawat, MD, Regional Operations & Supply Chain (Asia) and Country MD, Croda India; Sandhya Satwadi, Senior Director, CII; Debarati Sen, MD, 3M India region; Suhas Baxi, MD, Konecranes Pvt Ltd; Sushil Rathi, COO, Mahindra Logistics Ltd and V B Sant, Former Director General, National Safety Council at the 3rd Annual Conference on Occupational Health & Safety in Mumbai



Participants of the Advanced Manufacturing Programme with Late Professor Lord S K Bhattacharya, Chairman, WMG, The University of Warwick, United Kingdom

A visit to Germany and Austria, provided the opportunity for participants to delve deeper into the adoption and application of Industry 4.0 within the organisation. The mission endeavored to create awareness and understanding in a range of associated engineering and advanced manufacturing technologies. Managers from 11 Indian companies visited some leading companies in engineering & technology, robotics & automation, as well as training & research facilities.

Occupational Health and Safety

In a fast evolving global manufacturing environment, OHS have assumed centrestage. International firms, that have already embraced the 3-P philosophy, are willing to partner only with those firms that demonstrate their commitment to the philosophy. The 3rd edition of the Annual Conference on Occupational Health and Safety in Mumbai thus saw Industry leaders highlighting the imperative for companies to embrace safe working practices, for 'Make In India' to be a success. The need for companies to transition from the current mindset of 'Production First, Safety Later' to 'Safety-First, Productivity-Later' was reiterated by several leaders.

While Industrial Safety best practices are generally in place in most OEMs, majority of their vendors lack in these practices. The need for OEMs to handhold their vendors in building a culture of safety and thus enabling a safe work environment through the ecosystem has

been felt for long. In addressing the challenge, the Task Force on Industrial Safety flagged off its mentorship initiative with General Awareness Workshops on Safety. The Workshops aimed to facilitate development of a safety orientation and culture in SMEs, assist them in improving their safety processes & systems, train supervisors / line managers to achieve improved safety performance and enable them to recognize the business case for safety. Around forty small-scale vendors of the Task Force Member companies attended these Workshops.

Advanced Manufacturing and Industry 4.0

The two module Advanced Manufacturing Programme strives to develop an Indian way of manufacturing by exposing participants to next-gen manufacturing technologies & strategies, develop leaders to enhance global competencies and help participants develop cutting edge tools to compete globally. The 2nd batch of this special programme explored the next-gen manufacturing technology enablers & strategies during Module 1, held in University of Warwick, UK. The Module 2, held in India, concentrated on developing leaders aligned to the future of manufacturing in terms of technologies and future trends, enabling them to integrate current manufacturing practices with Industry 4.0 & Frugal Engineering. Participants visited the Jaguar Engine Plant, Renishaw, Amazon Distribution Centre and Kuka Robotics.

Taking forward the objective of building capacity for Industry 4.0, CII CME held an exhaustive training programme on ways to implement Industry 4.0. With a holistic approach to implementation, it focused on application of smart machines, analytics, Internet of Things, connectivity, automation, disruptive effect of exponential technologies and cyber security. Two workshops, spread over six days each, combined with 2-3 industrial visits, were attended by 45 participants.

Industry – Academia Linkage

Efforts to strengthen the link between manufacturing sector and the young generation continued through the year. One such effort is the Annual Manufacturing Quiz - Anvesh. The 2nd edition of the Quiz, saw participation of about 170 final year engineering and MBA students as well as young corporate professionals, with Hero MotoCorp Ltd and Steel Authority of India Ltd (Bhilai) emerging as winners.

SECTORAL INTEGRATION

Welding Industry

The Government launched the National E-Mobility Programme, with a vision for the country to achieve 100% e-mobility by 2030. This Programme is a step towards ushering in an era of clean, green and future-oriented technologies in the country. A Technical Conference, that focused on the changing landscape of electric vehicles in India and highlighted the opportunities and challenges, specially emphasising the

role of the Indian welding industry to keep pace with the latest EV trends, was organised during the year.

Fluid Power Technology Industry

Manufacturers and users of modern industrial equipment, across sectors such as machine tools, hydraulic presses, plastic machinery, die casting, foundries, steel mills etc benefitted from workshops organised in collaboration with industry players. Yuken Indian Ltd came forward to help companies understand the basics and maintenance of hydraulic systems.

Manufacturing and business excellence in hydraulics and pneumatics was also encouraged through a Mission on Fluid Power Business Excellence to Wipro Infrastructure Engineering and Dynamatic Technologies.

CII Pinnacle Awards for Excellence in Manufacturing

The CII Pinnacle Awards for Excellence in Manufacturing were initiated with the objective of recognising & rewarding excellence in manufacturing, facilitating knowledge sharing and implementation of best practices in the Industry and inculcating the culture & spirit of manufacturing innovation to make the sector globally competitive. Of the large number of companies that participated, the best amongst the best were awarded for operational excellence; environment, safety & health; gender diversity & inclusion; organised & impactful R&D efforts; future ready manufacturing and young/emerging manufacturing leaders of tomorrow.



Sameer Kelkar, CEO and R&D Head, Grind Master Machines Pvt Ltd receiving the Winner's Trophy for Young/Emerging Manufacturing Leaders of Tomorrow (Small and Medium Enterprises). From L to R: Satish Jamdar, Jury Member; Suresh Tanwar, Jury Member; Sameer Kelkar and Ravi Damodaran, Jury Member and Chief Technical Officer, Greaves Cotton Ltd in Mumbai

CII-SOHRABJI GODREJ GREEN BUSINESS CENTRE

Adopting the green path today is no longer a choice, but an imperative, for ensuring a sustainable tomorrow. With a vision to facilitate India's transformation as one of the global leaders in green businesses by 2022, CII adopted a multi-pronged approach to equip Industry with the latest & emerging concepts, tools and skills to gain competitive advantage. The CII-Sohrabji Godrej Green Business Centre (CII-Godrej GBC), a CII Centre of Excellence on green businesses, set up in 2003 in Hyderabad, was a timely step in this direction.

Today, the Centre offers services covering green buildings, green companies, energy management, green products and renewable energy. The Centre has developed green ratings, certifications and undertakes audits, advocacy, cleantech projects, capacity building, and outreach initiatives. As on January 2019, the Centre has cumulatively facilitated reduction of over 15 million tons of CO₂ per annum.

ADVOCACY

In 2018, Indian Green Building Council (IGBC) facilitated the additional Floor Area Ratio (FAR) incentive for IGBC projects in Haryana, Himachal Pradesh & Jharkhand as well as the Pune Metropolitan Region Development Authority. As on date, 9 States are offering incentives for IGBC green building projects.

Policy recommendations for 'Energy Efficient India 2030' were submitted to the Ministry of Power, BEE and NITI Aayog. These recommendations are expected to go a long way in equipping adoption & promotion of various energy management practices & approaches by stakeholders.



Hardeep Singh Puri, Minister of State (I/C) for Housing and Urban Affairs at the Green Building Congress 2018 in Hyderabad

ACTION

Spearheading the Green Building Movement in India

In 2001, CII established IGBC with a vision to facilitate India's march towards becoming one of the global leaders in sustainably built environment by 2025. Over close to two decades, this initiative has catalysed a green building movement across the country. As on January 2019, IGBC had taken India to be recognised amongst the top 5 countries, with over 6.63 billion sq ft of registered green building footprint. The year 2018 witnessed the highest registered footprint of 1.93 billion sq ft. IGBC aspires to facilitate 10 billion sq ft of green building footprint by 2022.

Green Building Rating Systems

To date, IGBC has launched 25 Green Building Rating Systems, designed to address various building typologies. These systems equip project teams to incorporate green building concepts and technologies, which in turn will enable the project to reap both tangible and intangible benefits. As on January 2019, over 5,000 projects, across the country were adopting IGBC rating systems. Some of the ratings launched were for homes, new buildings, existing buildings, villages, hospitals, cities, railway stations and healthcare. New rating systems for Net Zero Buildings, Resorts and Hill Habitat were also launched in 2018.

GreenPro Certification

Green building movement has created enormous demand for credible green building products, material and technologies. To enable the end users choose the right green products and material, CII has launched GreenPro- an ecolabel for the products. This ecolabel is based on a holistic life cycle based approach. GreenPro assess how green is the product based on its life cycle and accordingly certifies the product. GreenPro labelling standards are at par with international standards and is recognised by Global Eco-labelling Network (GEN). As on January 2019, over 550 products from 70 companies are GreenPro certified. GreenPro aims at green products market transformation in the Country and certify 3,500 products as GreenPro by 2022.



Piyush Goyal, Minister for Coal and Railways, presenting IGBC plaque to Vinod Kumar Yadav, General Manager, SCR for Secunderabad Railway Station-India's first CII-IGBC platinum rated green railway station

GreenCo Rating System

GreenCo Rating System is a first-of-its-kind rating system, which holistically assesses a company's performance on the green front and also suggests the way forward. Presently, over 500 companies, including the 225 GreenCo rated companies, are adopting GreenCo rating. The first 91 GreenCo rated companies have achieved annual cumulative savings of INR 175 crores, apart from gaining other intangible benefits. CII aspires to facilitate 1,000 GreenCo companies by 2022.

During the year, a MoU was inked with the Rajasthan Pollution Control Board (RPCB) to facilitate greening of Industry in the State using GreenCo Rating System. In 2018, customised GreenCo rating systems were launched for the textile sector, renewable energy and e-waste recyclers.

Energy Efficiency

CII-Godrej GBC conducts both preliminary and detailed audits across sectors, thereby enabling companies to identify areas for energy saving, define strategies and explore new growth opportunities.

As on date, over 1700 detailed energy audits have facilitated recurring annual saving of INR 3210 million. The Centre also conducted international energy audits in countries including- Australia, China, Indonesia, Ghana, Japan, Korea, Nepal, Oman and Philippines.

The mention of 'India-Sweden Innovations Accelerator Programme' in the 'Sweden- India Joint Action Plan' provided a major impetus to CII's efforts in promoting energy efficient and clean technologies. The joint declaration was issued by the two Prime Ministers.

A report on the impact of the first cycle of the Perform Achieve and Trade (PAT) scheme, developed jointly with BEE, is now an international reference document for understanding the impact of PAT Cycle 1.

The Cement Sustainability Initiative (CSI), in consultation with CII and other stakeholders, released the Low Carbon Roadmap for Indian Cement Industry: Status Review 2018.

Capacity Building of DISCOMs

CII was awarded the project for Capacity Building of DISCOMs by BEE, aimed at making DISCOMs across the country more energy efficient through development and implementation of demand side management (DSM) activities. Over a period of 24 months, CII will work with 14 DISCOMs in the South Indian States of Andhra Pradesh, Andaman & Nicobar, Kerala, Karnataka, Lakshadweep, Puducherry, Tamil Nadu and Telangana.

SME Investment Facilitation

Efforts to facilitate SMEs gain a competitive advantage continued in close collaboration with various SMEs and clusters across the country.

The Facility for Low Carbon Technology Deployment (FLCTD) project, being implemented in collaboration with UNIDO and BEE, is aimed at identifying innovative clean technologies in waste heat recovery, pumps & pumping systems and space conditioning. A unique activity, it financially supports pilot deployment of the selected innovative technologies. US\$ 500,000 was approved for the pilot deployment of the 13 innovations identified in the first round of selections in 2018.

Under Asian Cleantech MSME Financing Network (ACMFN), funded by European Union, more than 15 SME cleantech suppliers have been engaged to facilitate finance access to market.

Facilitating Cleantech in SMEs

A slew of initiatives were undertaken to develop a framework and an ecosystem for enabling adoption of energy efficiency practices by MSMEs. SIDBI supported the development of an Energy Efficiency Mobile App, in partnership with a software developer, for conducting energy audits in MSMEs.



Dr Thirumalachari Ramasami, Former Secretary, Department of Science at the GreenCo Summit 2018 in Chennai. From L to R: S Raghupathy, Deputy Director General, CII; Pradeep Bhargava, Chairman, GreenCo Council, CII – Godrej GBC; Jamshyd N Godrej, Chairman, CII – Godrej GBC and Chairman & MD, Godrej & Boyce Mfg Co Ltd and S Krishnan, Principal Secretary, Housing and Urban Development Department, Government of Tamil Nadu

Selected MSME clusters, in and around Tiruppur and Chandigarh, were supported in conducting resource efficiency studies and provided inputs on lean and clean manufacturing, with support from SIDBI and World Bank.

Awarding Excellence

The National Award for Excellence in Energy Management recognised over 150 companies for undertaking new and effective energy management initiatives and enhancing the company's bottomline. Additionally, 7 energy efficient products were awarded for their innovations.

In its 1st edition, the CII Performance Excellence Awards for Solar and Wind Plants, saw presentations by 16 shortlisted plants at Green Power 2018. The top 8 performers were awarded for 'Leadership in Performance', and the next 8 best performers were awarded for 'Excellence in Performance'.

Partnering with Indian Railways

CII is partnering with Indian Railways in greening of their production units/ workshops and various building



Pankaj Kumar, Secretary, Bureau of Energy Efficiency (BEE) at the Energy Efficiency Summit 2018 in Hyderabad

types and facilitating energy efficiency practices and approaches. As on date, over 50 railway units (including 44 rated) are registered under GreenCo rating. Over 35 stations, buildings/offices (including 15 rated) are registered with IGBC.

Facilitating Adoption of Renewable Energy Technologies

Green Power Market Development Group (GPMDG)-India initiative, currently in its fourth phase, facilitated 450 MW of green power in Haryana, Karnataka, Maharashtra, Telangana, Tamil Nadu and Uttar Pradesh.

Cumulative Benefits Achieved by CII's Facilitation Role

Activity	Cumulative Annual Recurring GHG Reduction (Million Tons CO ₂)	Cumulative Annual Recurring Saving (Million Rupees)
1700 Energy Efficiency Audits	6.56	3210
Implementation of GreenCo Rating (235 GreenCo Certified Companies)	1.34	3670
Green Buildings Rating Systems Completed for 1587 Buildings	7.39	3403
Facilitation of Green Power Procurement (450 MW)	0.5	2025
Total	15.79	12308

Facilitated reduction of over 15 million tonnes of CO₂ per annum

CII-SURESH NEOTIA CENTRE OF EXCELLENCE FOR LEADERSHIP

Effective leaders not only enable a company to achieve its goal, but also help build companies that contribute to the nation's growth agenda. The CII-Suresh Neotia Centre of Excellence for Leadership (CII-SNCEL), envisages for itself, a significant role in driving leadership development across businesses and socio cultural demographics, through a multitude of interventions focusing on 'people' and 'process' transformations.

LEADERSHIP DEVELOPMENT FOR SCALE-UP, SUSTAINABILITY AND GROWTH

Entrepreneur to Enterprise: Strategies for Scaling-Up and Sustainable Growth

In the wake of a 'New India' that has emerged in an increasingly disruptive global landscape there has been a rise of First Generation Entrepreneurs and start-ups. In the backdrop of disruptive business practices and digitization, this group of entrepreneurs often struggle to scale up their businesses to the next level of success and find sustainable growth. The 2nd Conclave on Leadership Development for First Generation Entrepreneurs, thus continued to discuss strategies for entrepreneurs to transform into enterprises by scaling-up and achieving sustainable growth. The two day conclave saw notable Government and Industry leaders, as well as successful entrepreneurs share their experience with young entrepreneurs seeking

knowledge to drive their companies to the next level of growth. New generation entrepreneurs received valuable insights on developing robust business strategies, leveraging technology, digital marketplaces, digital transformation and taking an idea to an IPO.

TRAINING AND CAPACITY BUILDING

People Transformation – Towards Creating a Leadership Pipeline

Young Leadership Development Digital Programme

The 3rd Young Leadership Development Digital Programme (YLDP), designed to impart leadership and management skills in cross functional areas to high potential young leaders (HPYL), was organised in a unique 2-way interactive, real-time learning format. The 4-month programme provided opportunities for live faculty interaction outside of work hours, enabling participants to balance learning and development needs with work related demands.

Certified Leadership Development Programme for First Time Managers

A Certified Leadership Development Programme aimed at equipping First Time Managers (FTMs) with knowledge and skills required to manage teams and keep employees motivated & engaged, without losing



From L to R: Harshavardhan Neotia, Chairman, CII-Suresh Neotia Centre of Excellence for Leadership and Chairman, Ambuja Neotia Group; Dr Sanjeev Chopra, Additional Chief Secretary, Department of Industry Commerce & Enterprises and Director General, Administrative Training Institute, Government of West Bengal and Sanjay Budhia, MD, Patton Group at the National Leadership Conference for First Generation Entrepreneurs: Entrepreneur to Enterprise: Strategies for Scaling-Up & Sustainable Growth in Kolkata



Session in progress at the Certified Leadership Development Programme for First Time Managers in Kolkata

sight of organisational goals, was launched during the year. The programme was a blend of classroom training combined with an online integrated interface.

Process Transformation – Towards Achieving a Healthy Bottomline at Optimal Costs

The Goldratt TOC Holistic Management Programme

For the second year in a row the Centre, in collaboration with the Goldratt School, USA organised two TOC Holistic Management Programme, a leadership training based on 'The Theory of Constraints' (TOC) in Chennai and Kolkata. Conducted through a six-module integrated curriculum, it enabled participating CXOs, senior level managers and functional heads to gain in-depth understanding of TOC through classroom sessions, followed by real life projects undertaken after each module. The Theory of Constraints is known to be extremely successful in driving breakthrough performance at little or no cost.



Session in progress at the The Goldratt TOC Holistic Management Programme in Chennai



Prof Vijay Govindarajan, Coxe Distinguished Professor, Tuck School of Business, Dartmouth College at StrategyEdge in Mumbai

MASTERCLASS

StrategyEdge

STRATEGYEDGE, an annual forum, sees some of the world's foremost thought leaders on strategy, innovation and marketing share insights with the Indian business community. The 3rd and 4th editions of the Forum, held in Chennai and Mumbai, were led by Professor Vijay Govindarajan, the Coxe Distinguished Professor, Dartmouth College's Tuck School of Business. A leading expert on strategy and innovation, he steered the day long masterclass as a Keynote Speaker on the theme Winning through Innovation: The Three Box Strategy. Over 250 C-level and senior level participants learnt about the unique framework that enables one to manage business responsibilities while taking action in three time horizons at once.

Thought Leadership Webinar Series

A 3-part Thought Leadership Webinar Series organized by the Centre focussed on providing practical insights into cutting edge developments taking place in the world of innovation and business strategy. Led by Mr Stephen Wunker, Managing Director of New Markets Advisors, this series was particularly relevant in a business environment where organisations are tasked with re-inventing business models and strategies that deliver enhanced customer engagement while driving business growth. The webinars revolved around how to build deep customer relationships & understanding of the business ecosystem and capturing new markets to turbocharge growth. The webinars also explored the concept of Costovation, i.e. using innovation tools towards making step-changes in cost.



From L to R: Harshvardhan Neotia; Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation and Indrani Kar, Head, CII-SNCEL at the 2nd CII Suresh Neotia Memorial Lecture in Kolkata

FUNCTIONAL LEADERSHIP

2nd Marketing Leadership Summit Breakthrough Marketing in Post-Digital Age

With the Centre's core agenda to enhance digital capability building, the 2nd Marketing Leadership Summit with the theme Breakthrough Marketing in the Post-Digital Age was organised. Themes at the Summit comprised marketing at the confluence of storytelling and automation, viral marketing in an interconnected digital world, redefining content marketing in a post-text world and the future of engagement in an age of mobile ubiquity.

LEADERSHIP ORATIONS

The 2nd Suresh Neotia Memorial Lecture

Shri Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation, addressed concerns of the aviation Industry during the 2nd Suresh Neotia Memorial Lecture. He shared updates on the Central Government's collaboration with States on alleviating issues.

Stop Decorating the Fish – Keynote Address by Rami Goldratt

Mr Rami Goldratt, CEO, Goldratt Group, the organisation that pioneered the implementation of Theory of Constraints, stressed on the importance of focussing on what will contribute to breakthrough innovations in his keynote address Stop Decorating the Fish.

LEADERSHIP DIALOGUES

Leaders Speak-Implicit Bias: Nature, Impact and Solutions

Professor Mahzarin Banaji, a globally renowned thought leader on Implicit Bias: Nature, Impact and Solutions led

the very first session of the Leader Speak Series held in collaboration with Mahindra Leadership University.



From L to R: Sunder Madakshira, Head of Marketing, Adobe India; Peter Yorke, CEO, Yorke Communications; Ramin Saherwala, Head-Media, Digital & Communications-South Asia, Glaxosmithkline and Meenu Bagla, Head-Global Brand & Digital Marketing, Tech Mahindra at the Marketing Leadership Summit in Kolkata



Rami Goldratt, CEO, Goldratt Group at the TOC Holistic Management Programme in Kolkata

Water is becoming a scarce commodity, posing one of the biggest challenges to the Industry. Year after year, the world is witnessing increasing variability in water availability. On the one hand, water demands are surpassing limited and shrinking supplies, while on the other hand, extremes, both droughts and floods are becoming increasingly visible, both in terms of frequency of occurrence and magnitude. The problem gets compounded, with deteriorating water quality, an add-on stressor, with impacts on human health and ecosystems.

Cognizant of the growing challenge, CII's Centre of Excellence on Water, CII-Triveni Water Institute (CII-TWI), engages with stakeholders for enabling water security in the country. Its unique services make use of innovative state-of-the-art digital analytic tools and frameworks—WATSCAN, WatSmart, Water Audits and Water Awards. For transforming water management in the country, the Institute works at various levels- policy, technology, governance, infrastructure, and for catalysing change in mindsets and behaviour. The Institute's key areas of intervention include:

- Water risk evaluation and planning through WATSCAN Tool
- Evidence based implementation of appropriate water management strategies



CII team conducting water audit in a sugar plant in Ajbapur, Uttar Pradesh

- Water smart rating system through WatSmart
- Water auditing across sectors such as Industry, municipality, buildings
- Water Pinch Analysis
- Benchmarking and baselines for improving water use efficiency
- Facilitating a conducive policy framework for treated wastewater; promoting new modes of financing for implementing PPP projects
- Interfacing municipality and Industry; municipality and agriculture
- Facilitating an efficient framework for water usage for sustainable Smart Cities
- Stakeholder sensitisation on water use efficiency through focussed events
- Recognising companies for water management initiatives.

ADVOCACY

Guidelines for Issuance of No Objection Certificate for Groundwater Withdrawal

CII's National Committee on Water continued to engage with the Central Ground Water Authority, Ministry of Water Resources, River Development & Ganga Rejuvenation and pursued the recommendations on the Draft Guidelines for issuance of No Objection Certificate (NOC), for groundwater withdrawal.

Our Cup of Joy

Our Cup of Joy, a compendium of India's best practices on water, is a flagship publication of the Water Institute. It curates and compiles best practices and case studies from multiple sectors-agriculture, Industry, buildings, municipality and rural water supply. The 2nd edition of the compendium highlights both low & medium cost, scalable and innovative strategies that can help narrow demand supply gap by about 30%. The Compendium aims to help diverse stakeholders understand how they can adopt these practices and excite, enthuse, and create a behavioural change among them to embark on conservation, take water efficiency measures and guide decisions for better management of the scarce and diminishing natural resource.

ACTION

WATSCAN: Evaluating Water Risks for Preparing Water Management Action Plan

WATSCAN, an integrated Geographic Information System (GIS) driven and satellite based Water Risk Evaluation Tool, applicable across scales from villages to river basins, was successfully applied throughout geographies to ascertain water risks and thereby design appropriate strategies for an improved water scenario. WATSCAN evaluation of water demand-supply gaps in over 25 districts of Haryana, Jharkhand, Maharashtra, Odisha, Rajasthan and Uttar Pradesh, provided a quantifiable roadmap enabling districts to move from drought prone to drought proof status.

Moving towards higher granularity, WATSCAN was applied at the village level in 4 drought prone villages in Aurangabad, Maharashtra for prioritising investment in implementation of appropriate water management strategies, thus enabling selected villages to move towards an improved water scenario. The initiative, supported by Standard Chartered Bank, involves in depth scientific assessment for strategizing water solutions.

Under the initiative, evidence based implementation of water structures such as gabion bunds, check dams, recharge systems and rainwater harvesting systems in schools as well as awareness generation programmes across the community, were completed.

Besides successfully undertaking digital water planning at various watershed levels, WATSCAN was also applied for urban flood assessment in Gurugram district. The report, outlining the challenges and solutions to attenuate the floods, is under implementation by the Government of Haryana.

Assessments for plant specific watersheds, to evaluate water risks to plant operations, were undertaken to identify appropriate water management strategies for ensuring sustained operations.

The water management strategies, arrived with WATSCAN, hold immense promise for curtailing water stress and leading to an improved water scenario. CII studies have demonstrated that initial 20-30% demand-supply gap can be reduced with simple cost-effective options.



WATSCAN assessed location for Cement Nala Bund, in water stressed Paithan Kheda village in Aurangabad, followed by on-ground implementation

Water Audits: What Gets Measured, Gets Managed

CII's comprehensive water audits across sectors, guide Industry in deciding options for reducing water usage, minimising wastewater generation and maximising recovery. The experience across more than 175 industrial water audits have demonstrated that 30-40% industrial and domestic water demand-supply gap easily gets reduced with cost-effective measures and give attractive return on investment in about a year. Further, 25-30% reduction in wastewater can be achieved by implementing low to medium cost strategies.

The Institute undertook detailed water audits, covering thermal power plants, beverages (alcoholic), automobile, sugar, refineries, integrated iron & steel, textiles and FMCG. Conducted for two public sector refineries in Mumbai, such audits led to the preparation of a comprehensive water balance and identification of strategies to reduce specific water consumption by the units. Potential water saving opportunities were identified through optimization of Cycles of Concentration (CoCs) in cooling towers; recovery of wastewater from the demineralization plant, Condensate Polishing Unit (CPU), cooling towers and enhancing the condensate recovery in the refinery.

KNOWLEDGE SHARING

Water Innovation Summit

To raise awareness and equip stakeholders to prepare for growing water risks, CII-TWI has instituted a vibrant

platform – the Water Innovation Summit, to facilitate deliberations and exchange of innovative ideas to promote thought leadership for enabling improved water use.

The 4th edition of the Summit focused on finding innovative water and wastewater management solutions to deal with the water scarcity challenge to enable economic growth and human development. The need to implement innovative solutions to address the rising challenge of hydro-politics surfacing across scales reverberated through the deliberations. The pertinent issues of evaluating trade-offs while implementing innovative water solutions and the emerging interfaces for NEW water were discussed with respect to managing water efficiently and addressing the water scarcity challenge. Solutions ranging from technology, policy reforms, awareness building for an improved supply-demand management were outlined.

CII National Awards for Excellence in Water Management

The innovative water management undertaken by the Industry was recognised by the Institute after a rigorous 3 stage evaluation process, including ground verification and evaluation by an eminent Jury. The CII National Awards for Excellence in Water Management 2018 were conferred upon companies for 31 innovative, scalable and good water and wastewater management practices.

Outreach and Conferences

Solutions based on technology, good water management & social behaviour, as well as reforms are the need of the hour to minimize the adverse impact of declining water quality. This was highlighted during the discussions at the conference on emerging threats due to declining water quality. The Conference highlighted the links between declining water quality and economic development and the need to combat runoff pollution from urban and agricultural areas.

Going forward, understanding environment and economic trade-offs will be critical for ensuring sustainability of operations. The National Conference on Pulp and Paper thus focused on understanding the trade-offs in water and wastewater management for taking informed decisions. The role of emerging tools, techniques & technologies in improving the water use efficiency in the sector was highlighted.

The Conference on driving a sustainable future for the auto sector showcased successful cases and shared user perspective to promote water use efficiency with state-of-the-art technologies.

A document outlining the guidelines for optimization of water usage in coal based thermal power plants was also released during the year.



Winners of the CII National Awards for Excellence in Water Management 2018 in New Delhi

CII-JUBILANT BHARTIA FOOD AND AGRICULTURE CENTRE OF EXCELLENCE



The CII-Jubilant Bhartia Food and Agriculture Centre of Excellence (FACE) is charged with the mission to improve competitiveness of India's agriculture & 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.

ACTION

Research/Projects

In 2018, a FACE study on 'Agriculture Markets in India – Role of Policies and Institutions' presented a roadmap for action by States and market institutions. The study focuses on latest reforms such as Model Agricultural Produce & Livestock Marketing Act, introduction of options in the Commodity Derivatives Market, and the Electronic National Agricultural Markets.

The Centre also expanded its regional footprint by taking forward existing projects and introducing new initiatives. A State-level study on Ease of Setting up Cold Chain Infrastructure is underway to identify operational hindrances faced by investors. The study, being conducted in 6 States, envisions a framework for fast-tracking cold chain infrastructure approvals. Ways to address operational challenges of cold store owners and enabling easy adoption of new technologies will also be summarised in this study.

A study to assess the viability of marketing marine and fisheries in Andhra Pradesh was also undertaken during the year. The lack of innovative & cost-effective logistics solutions for safe, hygienic & nutritious movement of fish to the consumer has been identified as a key constraint.

The Andhra Pradesh Mango Project, launched in 2015, in partnership with the Department of Horticulture, Government of Andhra Pradesh, gathered further momentum. During an exposure visit, Andhra Pradesh banana farmers interacted with farmers from Tamil Nadu Banana Growers Federation. They also visited fields using scientific banana cultivation practices and the National Banana Research Centre at Trichy.

Capacity Building in Food Safety

In an endeavor to build capacity in the food ecosystem, FACE reached out to over 20,000 stakeholders, including about 6000 food business operators, with food safety trainings, assessments and in-company interventions. CII-Surakshit Khadya Abhiyan (SKA) was recognised by Food Safety and Standards Authority of India (FSSAI) as a star performer, given the impact made by over 200 Food Safety Training and Certification (FoSTaC) Programmes. The newly launched Food Contact Materials Workshop, held in association with Indian Institute of Toxicological Research, helped strengthen the capacity on analysis, testing relevance and applicability.



Exposure visit of Andhra Pradesh Banana farmers to Tamil Nadu



Dr Martin Cole, Chairman, ICMSF; Dr Leon Gorris, Secretary, ICMSF and Dr Kiran Bhilegaonkar, India Representative, ICMSF along with overseas faculty from Australia, Dubai, Indonesia, Switzerland, UK, USA and many more at the FSSAI-CHIFSS-ICMSF Symposium on Microbiological Food Safety in New Delhi

The annual CII – SKA Asia Food Safety Quiz Contest for Colleges, held in partnership with FSSAI, went international with participation of educational institutions from 9 countries -Bangladesh, Bhutan, Indonesia, Malaysia, Maldives, Nepal, Philippines, Sri Lanka and Thailand. National Institute of Food Technology Entrepreneurship and Management (NIFTEM) was declared the winner at the finals, held on the sidelines of the 13th Food Safety, Quality and Regulatory Summit. FSSAI also awarded internships to the ten finalists.

Promoting Science Behind Food Safety

The CII-HUL Initiative on Food Safety Sciences (CHIFSS), set up for driving science-based food safety in the country, achieved significant milestones in its year long journey. To strengthen the MSMEs, Food Safety Management System (FSMS) guidance documents were developed for high risk sectors such as poultry, meat and fish. Resource person trainings and workshops, on several technical aspects such as food safety assessments, were conducted during the year. Students, academia and general public were sensitized on the need for food safety assessment of novel ingredients.

Based on the outcome of the Roundtable supported by the American Society of Microbiology, the Food Safety and Standards Authority of India (FSSAI) is working with WHO to use the Integrated Health Information Platform (IHIP) for sharing data for surveillance and response to food borne disease outbreaks. With the aim to bring global best practices in microbiological food safety, FSSAI and CHIFSS partnered with International Commission on Microbiological Specifications for Foods



From L to R: Pawan Agarwal, CEO, FSSAI; Rita Teaotia, Chairperson, FSSAI; Prof Manfred Eggersdorfer, Professor of Healthy Ageing, University Medical Centre Groningen, Netherlands and Simon Pettman, Executive Director-IADSA at the FSSAI-ReCHaN 3rd Stakeholder Session on Science of Supplementation in New Delhi

(ICMSF) to promote sampling, testing and statistical interpretation. The international symposium, organised under this collaboration, saw 11 international experts interact with 300 eminent scientists, Government officials, academicians, Industry leaders and students. As a result, a continued collaborative engagement on Microbiological Food Safety Capacity Building in India is being planned by CHIFSS and ICMSF.

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

ReCHaN, a resource centre for health supplements and nutraceuticals, collaborated with the FSSAI, to catalyse global excellence in capacity building. A series of scientific dialogue forums on international best practices was organised with stakeholders and global experts. Guidance documents on Compliance & Good Manufacturing Practices formed the basis for design of FoSTaC training packages for regulators, Designated Officers (DOs), Food Safety Officers (FSOs) and Food Business Operators (FBOs). The first in the series of Food Safety & Management Systems training sessions for DOs/FSOs and a workshop on National Level Resource Persons (NLRP) was facilitated by FACE. A number of FBOs took part in workshops about regulations and FSMS for health supplements & nutraceuticals. Consumers benefitted from the awareness programme on health supplements & nutraceuticals held at the ReCHaN Stall at FSSAI's Eat Right Mela in New Delhi.

Promoting a Culture of Excellence

Given that a culture of excellence is key to India becoming a global food hub, the 13th Food Safety,



From L to R: B Thiagarajan, Co-Chairman, CII National Council on Agriculture and Joint MD, Blue Star Ltd; Dr Ashok Dalwai, CEO, National Rainfed Area Authority, Ministry of Agriculture and Farmer's Welfare and Chairman, Committee on Doubling Farmers' Income; Harsimrat Kaur Badal, Minister of Food Processing Industries; P Ravichandran, Chairman, CII Task Force on Post-Harvest & Logistics and President, Danfoss Industries Pvt Ltd and Pankaj Mehta, Co-Chairman, CII Task Force on Post Harvest & Logistics and MD, Carrier Transicold at the National Post-Harvest & Logistics Summit in New Delhi

Quality & Regulatory Summit was themed Managing Product Integrity, Regulatory and Food Safety Solutions in the Food Chain for Consumer Health and Safety.

The CII Food Safety Awards, aimed at stimulating best in class food safety and quality practices in the country, launched the new Award Model for Food Testing Laboratories based on Maturity Assessment. Envirocare Laboratory, Mumbai won the award for outstanding performance in 2018. This year, the award applications saw a 13 fold increase since inception, with over 70% from the small and medium food sector. Eight companies qualified out of the participating 15 for the coveted awards on outstanding performance.

Encouraging Best Practices in Cold Chain Segment

The 3rd edition of the National Cold Chain Awards, instituted to encourage adoption of best practices in the cold chain sector, recognized 12 companies for their outstanding performance. The National Post-Harvest & Logistics Summit, held in partnership with MoFPI, MoAFW and NCCD, took forward the key agenda of reducing post-harvest management and strengthening the agricultural supply chain.

LEVERAGING TECHNOLOGY TO TRANSFORM AGRICULTURE

Considering the critical need for innovation, and technology in moving the agricultural production frontier several notches up, FACE launched the Ag-Tech Programme in 2015. The 2nd Advanced Technologies Reshaping Indian Agriculture Summit endeavored to

accelerate scalability and commercialization of emerging technologies in agriculture. The 'Global Dialogue on Digital Pathways in Agriculture 2.0' also generated vibrant conversations on innovative solutions for the farm sector. Discussions on the role of big data and AI integration in the agri ecosystem; financing start-ups and fostering Industry partnership for scale and success took place in various innovative workshops.

AgLive 2018– The Agri Innovators Challenge continued to provide a platform for mentoring and handholding start-ups on rapid prototyping of ideas, funding and commercialization. The Innovators Pitch saw 10 dynamic innovators pitching their ideas/products to an esteemed jury comprising key venture capitalists and angel investors. Apart from the first prize winner getting a fully funded exposure trip to Israel, the top three innovators were granted 20 hours of mentoring from top Industry leaders and an equity investment opportunity by renowned incubators. The Indian Angel Network also selected six innovators for further due diligence and possible investment opportunities.



Innovators Pitch winner Devendra Chandani, Co-Founder, Intello Labs receiving the award from Jury Members in Chandigarh



KNOWLEDGE ECONOMY INITIATIVES



- › Industrial R&D, Technology & Innovation
- › Intellectual Property Rights
- › Corporate - Start-Up Business Connect & Future Businesses
- › Competitiveness Development Services
- › Skill Development
- › Human Resource Development
- › Industrial Relations



INDUSTRIAL R&D, TECHNOLOGY AND INNOVATION

GLOBAL INNOVATION & TECHNOLOGY ALLIANCE

Global Innovation and Technology Alliance (GITA) is a not-for-profit Public Private Partnership (PPP) company promoted jointly with the Technology Development Board (TDB), Department of Science & Technology (DST), Government of India (GoI).

GITA encourages industrial investments in innovative technology solutions by mapping technology gaps, evaluating globally available technologies and forging techno-strategic collaborative partnerships appropriate to India. Connecting companies with institutional partners, encouraging collaborative industrial R&D projects, and providing funding for technology development / acquisition / customization / deployment are GITA's key focus areas.

ACTIVITIES

India-Canada Collaborative Industrial Research & Development Programme

The India-Canada programme aims to foster and support development of collaborative R&D projects that bring together companies, research organisations,

academia and other collaborators from both countries for joint development of innovative products or processes. The US\$ 500,000 per annum programme is partially funded by DST and NRC Industrial Research Assistance Programme (NRC-IRAP). This fund will focus on development of advanced materials / advanced manufacturing techniques, clean technologies, smart cities, food & agro technologies and affordable healthcare.

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

The India-Israel Industrial R&D and Technological Innovation Fund (I⁴F), a cooperation between the DST and the National Technological Innovation Authority, Israel was launched in 2018. The US\$ 40 million fund promotes, facilitates and supports joint industrial R&D projects, between companies from India and Israel. Over a five year tenure, this fund will encourage projects in agriculture, information communication technologies, energy, healthcare and water.

India-Italy Collaborative Industrial Research & Development Programme

The India-Italy Collaborative Industrial Research & Development Programme will receive an annual contribution of US\$ 500,000 from DST and Directorate General for Cultural and Economic Promotion and Innovation of the Ministry of Foreign Affairs and International Cooperation, of Italy. Through this fund, Indian and Italian companies will collaborate on research in advanced manufacturing & materials, aerospace as well as technologies for cultural heritage. Clean tech research covering renewables, water and environment will be encouraged, apart from projects on Internet of Things.



Prime Minister, Narendra Modi and Italian Prime Minister, Prof Giuseppe Conte announced the India – Italy Collaborative Industrial Research & Development Programme during the India – Italy Technology Summit 2018 in New Delhi



From L to R : Deep Kapuria, Board Member, GITA and Executive Chairman, The Hi-Tech Group; Prof Ashutosh Sharma, Secretary, DST; Vikram Kirloskar, Vice President, CII & Chairman, GITA and Chairman & MD, Kirloskar Systems Ltd & Vice Chairman, Toyota Kirloskar Motor and R Ramanan, Mission Director, Atal Innovation Mission, NITI Aayog at GITA's Foundation Day Celebrations in New Delhi

India-Republic of Korea Joint Applied R&D Programme

The DST partnered with Ministry of Science and ICT (MSIT), Republic of Korea to foster collaborative R&D projects by bringing together companies, research organisations, academia and other collaborators from both countries. Meant for joint development of innovative products or processes, the projects approved under this programme develop technologies that can be commercialised or localised within 2 years. This 5 year, US\$ 40 million fund, is bringing together innovators in digital transformation, future manufacturing, healthcare, future utilities and clean tech.

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

Launched in 2018, this Co-operation with Spain provides a grant of upto INR 1.5 crore to Indian companies to catalyze R&D and Innovation. The US\$ 500,000 per annum are funded jointly by DST and Secretariat of State for Research, Development and Innovation, Ministry of Economy and Competitiveness, Government of Spain. Projects approved under this Co-operation are focused on clean tech, with specific work on renewable energy, transport, smart grids for smart and sustainable cities. Research on advanced manufacturing & materials and agro & food technologies is also supported by this fund.

GITA Innovation Exchange (GIXC)

The need for Industry to innovate has never been so compelling, as it is today, an age where hyper-

competition triggered by commoditization is a norm. The GITA Innovation Exchange (GIXC) was thus launched for matchmaking actors across the innovation spectrum. The aim is to foster credible connects for technologies and technological partnerships, finance for innovation and IP services.

At the GITA Foundation Day stakeholders had an opportunity to learn from practitioners from Germany, Israel, Korea and Sweden as well as the tech display of some GITA facilitated projects. The India-Republic of Korea Joint Applied R&D Programme, 2018 was also launched at this platform.

During the Financial Year 2018-2019, GITA on behalf of the various ministries, supported nine projects under the Bilateral Programmes and four projects under the Technology Development Fund (TDF).

TECHNOLOGY INITIATIVES

Research & Development (R&D) plays a vital role in defining economic growth and prosperity of a nation. A strong R&D infrastructure is directly proportional to a nation's continued strive for innovation and creation of employment opportunities. According to a report of the Department of Science and Technology, Government of India, the country's Gross Expenditure on R&D (GERD) as percentage of GDP has remained in the 0.6 to 0.9% range for nearly three decades. With a low Industry spend on R&D, the GERD stood at 0.69% in the year 2014-15.

The R&D spend needs to be catapulted to the projected level of 2.5% of GDP, over the next five to ten years for the pace of innovation and technology development to gain acceleration in India. With this objective, the Government of India has launched several initiatives to enhance innovation and R&D investments. The most recent amongst these include prioritizing university grants to reflect Industry needs, expediting intellectual property rights processes, and strengthening CSIR/ DRDO labs. Over the years CII has also initiated a slew of programmes to promote an innovation economy in India. These have helped prioritize successful technology innovations across sectors.

ADVOCACY

During the year, the CII National Committee on Technology made concerted efforts to improve Indian Industry's R&D intensity by stimulating Industry investment with adequate support from Government. A proposal was mooted to mandate the investment of a minimum percentage of revenue in R&D. The percentage could be decided based on the R&D intensity of the Industry. It was also proposed that, as per their priorities, the line ministries allocate a percentage of their budget for developing technologies. The Prime Minister's Science, Technology and Innovation Advisory Council, to whom these recommendations have been made, is deliberating on these recommendations.

A detailed framework for ranking and rating scientific laboratories across the country was developed along with NITI Aayog, its Task Force comprising representatives from various S&T Labs as well as external experts. The

detailed framework with specific indicators, scoring questions and weightages based on inputs from relevant stakeholders has been presented to representative labs in basic, applied and service categories.

Considering the importance of achieving self-reliance in critical and strategic resources extracted from rare earths, Industry representatives met NITI Aayog to formulate appropriate business models suited for India's rare earth Industry.

ACTION

In its endeavor to create an enabling science, technology and innovation ecosystem in India, CII provided several platforms to boost stakeholder capacity and capability. Joint industrial R&D projects under the US\$ 40 million Industrial R&D and Technological Innovation Fund (I4F) were awarded at the India-Israel Industrial R&D and Technological Innovation Conclave, organised in partnership with DST, GITA and Israel Innovation Authority. Under the I4F, announced during the Prime Minister's visit to Israel in July 2017, selected Indian companies get a grant of upto 50% of their budget for R&D Projects in ICT, healthcare, energy, agriculture and water with an Israeli Industry partner.

The 24th DST-CII Technology Summit, with Italy as partner country, witnessed encouraging representation from several European nations. With the Prime Ministers of India and Italy addressing the Summit, it was an interactive platform to forge knowledge partnerships between two countries in the areas of cultural heritage, cleantech, renewable energy, aerospace, healthcare,



From L to R: Dr Harsh Vardhan, Minister for Science & Technology and Earth Sciences; Giuseppe Conte, Prime Minister of Italy, Narendra Modi, Prime Minister of India, Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises and Giulio Pedrollo, Vice President, Confindustria at the DST-CII India-Italy Technology Summit in New Delhi



From L to R: Sanjeev K Varshney, Head, International Cooperation (Bilateral), DST; Daniel Carmon, Ambassador, Embassy of Israel; Prof Ashutosh Sharma, Secretary, DST; Parikshit Luthra, Assistant Editor, CNBC TV18 and Kris Gopalakrishnan, Past President, CII, Chairman, India-Israel Industrial R&D and Technological Innovation Conclave, Board Member, GITA and Chairman, Axilor Ventures & Co-Founder, Infosys at the India-Israel Industrial R&D and Technological Innovation Conclave in New Delhi

education, and ICT. The key recommendations from the business and research perspectives were presented to the two Prime Ministers at the valedictory session.

The Summit also resulted in launch of the next phase of India-Italy Industrial Research and Development Cooperation programme; initiation of the process to set up a bilateral CEOs forum; a fast-track mechanism to promote two-way trade and setting up of centres of excellence in select areas such as preservation of cultural heritage, life sciences and geo-hazards. The Prime Minister of India stated that the two countries were exploring the feasibility of collaborating in lifestyle accessories design, with special focus on leather, transportation and automobile.

WASTE TO WORTH

As the volume of Municipal Solid Waste (MSW) increases with a growing population, India is faced with a massive challenge of managing this waste effectively. The Swachh Bharat Abhiyan, launched by the Prime Minister of India Shri Narendra Modi in 2014, is aimed at eradicating this growing menace. In alignment with this Mission, in 2018, the PM's Science, Technology and Innovation Advisory Council identified Waste-to-Energy as a priority area. A CII National Task Force on Waste to Worth was constituted to develop a robust and sustainable PPP model and attract private sector

investment in state-of-the-art technology solutions for MSW management.

ADVOCACY

During the year, efforts were directed at encouraging private sector investments in MSW by engaging key stakeholders from the waste management industry, financial institutions and the Government. Based on these insights, policy recommendations and a broad framework of the PPP Model for Integrated MSW Management was presented to Shri Hardeep Singh Puri, Minister of State (I/C) for Housing and Urban Affairs. His inputs on the framework are being incorporated by the Task Force into a draft Request for Proposal for Integrated MSW Management in India.

The Task Force also shared the issues and recommendations with the Prof K VijayRaghavan, Principal Scientific Adviser, Government of India. He agreed to support the initiatives and advised CII to work with PSA office to push the agenda/suggestions in the area of MSW management. CII will work with the PSA's office to give concrete shape to the suggested approach and take it to implementation in some cities.

ACTION

As the Industry Partner to the 8th Regional 3R Forum in Asia and the Pacific, CII curated an exhibition; a day long Indian Industry session on 3R & Waste Management and



From L to R: V K Jindal, Joint Secretary, MoHUA; Durga Shankar Mishra, Secretary, MoHUA; Sumitra Mahajan, Speaker of the Lok Sabha; Hardeep S Puri, Minister of State (I/C), MoHUA and Maya Singh, then Urban Development Minister, Government of Madhya Pradesh at the 8th Regional 3R Forum in Asia and the Pacific in Indore

3R Awards. The Forum is a joint initiative with Ministry of Housing and Urban Affairs (MoHUA), Government of India (GoI); the Ministry of the Environment of the Government of Japan (MOEJ) and the UNCRD. Smt Sumitra Mahajan, Speaker of the Lok Sabha, addressed over 300 delegates from 35 countries and international organisations at the Forum. Exhibitors from Australia, Japan, Russia and Singapore participated in the exhibition, along side participants from the UN, Municipal Corporations of Kanpur, Ujjain, Coimbatore and Indore, State pavilions of Madhya Pradesh and Chandigarh, and about forty Industry exhibitors. The 3R Awards, announced at the Forum, recognised the exemplary work of 11 Indian companies in 3R, e-waste management, waste to recyclable, MSW management and industrial waste generated by start-ups, SME's and large companies.

Seven technology providers and a financial institute from Japan participated in the 3rd International Conference on the PPP Model for Waste to Worth Projects in November 2018. Attended by over 350 delegates, the Conference saw interactions with Government, private sector as well as international organisations from China, Netherland, Poland, Spain and Taiwan. MoHUA, Ministry of Environment, Forest & Climate Change (MoEFCC) and the MOEJ partnered CII for this conference, that focused on 'Private Sector Investment in MSW Management- Towards Sustainable Swachh Bharat' in India.

INNOVATION

Over the years, a myriad efforts have been undertaken for creating a favourable innovation ecosystem in India. To boost this ecosystem further and to transform India

into an attractive innovation destination, the country needs to bring together various stakeholders such as Government, Industry, academia and society. CII has taken the lead in orchestrating a series of initiatives towards fostering innovation in Indian Industry and encouraging entrepreneurial ventures.

ADVOCACY

As a key contributor to the development of national policies on innovation, CII's Future Businesses Council actively engaged with the Government and provided inputs, resources, and Industry's thought leadership. This year, critical policy advocacy work was undertaken in research & development, technology transfer, and intellectual property rights. Some of CII's recommendations in the three areas are as follows:

- Creation of a procedure to capture and record the sub-critical R&D investments by Indian Industry and MNCs to provide key information for effective policy formulation
- Establishment of Centres of Excellence (CoEs) in key emerging technologies such as artificial intelligence (AI), robotics, cloud computing, VAR, cyber security, convergence technologies, amongst others. These could be established in partnership with leading academic institutes and Industry. To ensure self-sustainability and focus on innovation instead of basic research, these CoEs could be encouraged to generate a portion of their expenses through IP sales
- A robust Industry-Academia linkage will enable Industry to access institutional knowledge. In this regard, Government needs to create a system of encouraging and channelizing increased public funding to higher education institutes to incentivize Industry collaboration
- Academic institutions undertaking industrial R&D may be mandated to establish effective technology transfer offices, that are constantly monitored for identifying and establishing new Industry connect
- Government may explore a PPP model that encourages Industry contribution beyond capital to include access to experts and innovation laboratories within R&D institutions on a formal and sustainable basis. Such PPP mechanisms/ models will encourage research with strong business focus and enable seamless transition from basic research to applied research and technology commercialization

- Given that AI is a new age technology, India needs to develop a strong policy framework to leverage its benefits and negate the disadvantages. Indian Industry and academia need to enhance their AI IPR portfolio and other related areas to assume their place at the centrestage of the global landscape. Simultaneously, the Indian Patent Office will need to evolve rules and procedures to protect these inventions
- For strengthening IPR management, the Industry and Government need to continuously study emerging IPR issues that may negatively impact ease of doing business in India
- Establishing cells for IP related guidance and offering mentoring in the Software Technology Parks of India (STPIs) and other locations where entrepreneurship is thriving may be considered
- Accelerate IPR awareness campaigns across the country with a special focus on technical education institutes and engineering colleges. Collaborate with other nodal agencies to provide special training on IPR laws to judiciary, especially in Tier II and Tier III cities
- The Central and State Governments may consider establishing a dedicated knowledge portal for patenting
- To facilitate technology transfer from academic and research institutions, both Industry and Government need to work together. IPR ownership being a major consideration for Industry, the Government may consider evolving policies for shared IPR ownership.

ACTION

The Global Innovation Index (GII), co-published by World-Intellectual Property Organization (WIPO), Cornell University and INSEAD with CII as a Knowledge Partner, has been ranking 126 countries according to their innovation capabilities and outcomes, using 80 indicators amongst a host of other important parameters. CII's consistent efforts at helping improve India's ranking in the GI have meant that the country moved up from the 60th position in 2017 to 57th in 2018.

The GI, in its 11th edition in 2018, focused on the theme 'Energizing the World with Innovation.' Access to energy, a prerequisite for improving standards of living and economic development, in the context of Global Innovation Index, it counts as a necessary ingredient to innovation. The GI 2018 analyses the energy innovation landscape of the next decade and identifies possible new technological breakthroughs and innovative approaches along with their sources at the country, region, and firm level. The GI 2018 also explores innovations in energy production, energy storage, energy transport and distribution, and energy consumption.

The India launch of the index was hosted by CII at an exclusive platform in partnership with WIPO and in collaboration with the Department for Promotion of Industry and Internal Trade (DPIIT), formerly DIPP. Aimed at maintaining the innovation momentum in India to take it amongst the top 25 countries in GI by 2025, this one-day event hosted sessions on success stories of innovation from India and across the world.



Mahindra & Mahindra Ltd receiving the Grand Award of CII Industrial Innovation Awards 2018 at Global Future Business Forum 2018 in New Delhi

The Global Future Business Forum aims to bring select leadership of top business houses on a single platform to share success and failure, and forge stronger collaboration with future leaders. With the theme of 'A platform for innovative, high growth, new age businesses' the forum hosted the Startuppreneur Awards and the 5th Industrial Innovation Awards. The forum also witnessed case study presentations by top start-ups and innovative companies of 2018.

The CII Industrial Innovation Awards aim to encourage firms to learn about innovation and best practices and help them build industrial competitiveness. A comprehensible feedback report, that outlines their strengths and weaknesses on firm level innovation parameters/ indicators and benchmarks their firm to other innovative firms in India, was also given to the participants.

The 5th CII Industrial Innovation Awards 2018 received 250 plus entries from large, medium and small & micro firms from across the country. The top 25 firms were selected by assessors to be considered by the Grand Jury for the awards in the category of Manufacturing and Services sectors and recognized for their excellence in Innovation. Of these, seven Indian firms were chosen for category awards in large, medium and small & micro enterprises. Mahindra & Mahindra Ltd was awarded with the Grand Award for being the 'Most Innovative Company of the year 2018'.

CII-GUJARAT KNOWLEDGE APPLICATION AND FACILITATION CENTRE

CII-Gujarat Knowledge Application & Facilitation Centre (CII-GKAFC) supports Industry, technopreneurs and society through consultancy and advisory services across sectors. Set up with support from Government of Gujarat, CII-GKAFC assists Industry in becoming future ready by enhancing their in-house industrial R&D capability, taking up collaborative R&D, improving quality of products and services and assessing global markets. The Centre also offers advisory services in legacy waste management, sustainable mobility solutions, ambient air quality monitoring amongst others. Several innovation driven start-ups benefitted from the handholding

received in understanding market needs, refining innovations, acquiring standards & certifications and obtaining demonstration & pilot projects.

ADVOCACY

CII-GKAFC, in consultation with stakeholders from the Electric Vehicle (EV) industry, submitted to the Government of Gujarat, recommendations towards a holistic/model EV policy. CII Members deliberated on the proposal with Shri Saurabh Patel, Minister, Energy, Government of Gujarat in a meeting held for submitting the document.

ACTION

Pursuing the objective of creating awareness and building capacity, CII-GKAFC continued to bring together varied stakeholders. The seminars and workshops, addressed by Government, experts, Industry, and global participants, enabled expression of diverse viewpoints and helped build greater understanding of issues.

Following the Prime Minister's clarion call on Zero Defect, Zero Effect, a series of awareness and certification programmes were conducted in Bhavnagar, Palanpur and Ahmedabad in Gujarat.

In line with the National Mission on Electric Mobility, the Centre's Conference on e-Mobility provided a platform to deliberate on key issues on this topic.

Workshops and training on ISO 9001:2015 and ISO 45001: 2018 helped build capacity in this area. An



From L to R: D J Yadav, Chairman, CII Gujarat State Council and Director, Arvind Envisol Ltd; Piruz Khambatta, Chairman, CII WR and Chairman & MD, Rasna Pvt Ltd; Jai Prakash Shivhare, MD, Dholera Industrial City Development Ltd, Government of Gujarat and Karthick Athmanathan, Head, EV & eMobility Solutions, Ashok Leyland Ltd at the Conference on e-Mobility 2018 in Ahmedabad

interactive session on Business Opportunities with Business France was the perfect occasion for businesses from the two countries to explore opportunities for collaboration. Other areas of focus for the Centre included bio-medical technologies available for commercialization and the challenges in medical technologies innovation.

TAMIL NADU TECHNOLOGY DEVELOPMENT AND PROMOTION CENTRE

Tamil Nadu Technology Development and Promotion Centre (TNTDPC), a joint initiative of CII and the Government of Tamil Nadu, plays a pivotal role in disseminating information about latest technologies and developing a strong network amongst Industry, Government, academia, international partners and other potential stakeholders.

Agriculture Sector

TNTDPC actively supports the agro sector by creating awareness and disseminating information on new business opportunities. The Centre also connects prospective entrepreneurs with possible technology providers. In pursuit of these endeavors, a Conference on Digital Agriculture was organised in Chennai to focus on new agricultural methods that the digital revolution will provide. These are expected to enable farmers in optimizing resources, improving crop quality & quantity, and remaining productive in a changing climate.

MSME Sector

The Centre works across sectors in the manufacturing value chain to understand key challenges and propose solutions & interventions to address the challenges. Given that manufacturing and MSMEs are a major focus area, the Centre explored aerospace & defence manufacturing technologies as a key area which is opening up opportunities for MSMEs. A conference was organised with the theme Fostering a Competitive, Innovative and Robust Industry highlighting the emerging technologies in this sector, the possibilities for catalyzing MSME growth and encouraging indigenization with support of key stakeholders.

Conference on Aerospace & Defence Manufacturing Technologies with the theme 'Fostering a competitive, Innovative and Robust Industry' projected the manufacturing technology in the Aerospace and Defence sector and to catalyze growth of MSMEs and to innovate & develop indigenization with the support of the key stakeholders.

Chief Technology Officers Forum – Roundtable Series

The rate at which technology is disrupting businesses has recently gained substantial momentum, requiring CTOs to continuously evolve and learn. The Chief Technology Officers (CTOs) Forum – Roundtable series has been initiated to ensure preparedness of CTOs for new age technologies and to enhance the Industry's innovation capability. A series of ten roundtables provided a platform to discuss and collate emerging & existing technologies and enhance professional excellence.



From L to R: Dr Ajay Kumar, Secretary, Department of Defence Production, Ministry of Defence; Ramesh K, Director and Head, TNTDPC; Rajinder Singh Bhatia, President & CEO-Defence, Kalyani Group; Lt Gen Subrata Saha PVSM UYSM YSM VSM (Retd), Director General, SIDM and Principal Adviser, CII; Jayant D Patil, Whole Time Director (Defence Business) & Member of the Board, Larsen & Toubro Ltd; Jayakar Krishnamurthy, Conference Chairman and Chairman & MD, UCAL at the Conference on Aerospace & Defence Manufacturing Technologies in Chennai

INTELLECTUAL PROPERTY RIGHTS

Having realized the importance and benefits of IP creation, the Indian Industry has, over the last few years, stepped up investments in this area. The Government of India too has unleashed a series of initiatives to upgrade the infrastructure and make policy level changes, thus creating a conducive environment for IP generation. CII's IPR initiatives are focused on facilitating Indian Industry to attain global leadership by harnessing and leveraging IP. Initiatives are thus directed at leveraging India's innovation prowess by creating a strong IP ecosystem through capacity development, IP protection, enforcement and policy reforms.

ADVOCACY

While following the contours of existing Indian laws, Government policies and rules, CII equally considers the interests of its Members in preparing policy positions, making action plans and evolving advocacy plans. Working closely with stakeholders, the IP Committee put forward a series of recommendations to the Central Government, considered critical to improving the IPR framework in the country.

Apart from making suggestions on the IPR Guidelines for the Capital Goods Scheme issued by the Department of Heavy Industry (DHI), CII also engaged with the

Government on the data protection framework for India. Recommendations were also made on simplification of Form 27 of the Patents Act and licensing of Standard Essential Patents (SEP) under the FRAND system.

Interactions with start-ups have revealed that, though stipulated by the Department for Promotion of Industry and Internal Trade (DPIIT), formerly DIPP, many do not get the pro bono support of patent attorneys for filing patent applications. A request to DPIIT is being made to help plug the gap in policy implementation.

To provide a holistic picture and highlight the developments in India's IPR ecosystem, a statement along with recommendations were shared with the United States Trade Representative (USTR), United States International Trade Commission (USITC). IPR related issues were discussed with GIPC and PHrMA in a series of meetings held during the year.

ACTION

CII's efforts towards IPR awareness creation, capacity building, international networking and combating counterfeiting & piracy gained momentum in 2018-19. As a step in this direction, advanced level workshops on IPR were held in partnership with organisations



Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation at the 10th National Intellectual Property Awards in New Delhi



From L to R: N N Prasad, Assistant Director General & Chief of Staff in the Office of the Director General, World Intellectual Property Organization; Dr Francis Gurry, Director General, World Intellectual Property Organization and Arvind Thakur, Co-Chairman, CII National Committee on Intellectual Property and Vice Chairman & MD, NIIT Technologies at the Roundtable on Ease of Doing Business and IPR in New Delhi

such as USPTO, EUIPO, JPO, UKIPO and WIPO. An IPR sensitization programme for police and custom officials and other awareness programmes held in partnership with Intellectual Property Office, India (IPO-India) helped raise IPR awareness amongst stakeholders. Going forward, invention camps are being planned in partnership with the Inventors' Hall of Fame, USA.

The National IP Awards 2018, held jointly with DPIIT (formerly DIPP) and IPO-India, on World IP Day, honoured outstanding innovators, organisations and companies in the field of Patents, Designs, Trademarks and Geographical Indications, among others. The India Intellectual Property Convention, held concurrently, focussed on the theme of 'Showcasing India's Intellectual Property Prowess'.

The three organisations also partnered for the 4th International Conference on IPR titled 'Ease of Doing IP Intensive Business in India'. International and Indian speakers from Government bodies, IP lawyers & attorneys, legal counsels, Industry and academia shared their knowledge & experiences of Intellectual Property and enforcement with over 250 delegates.

The IPR Awards were instituted with a view to promoting an IP protection culture in Indian industry. Based on a five-year, jury evaluated process, 11 Awards were given in 2018, to commemorate those Indian companies that have excelled in patents, trademarks and design.

ANDHRA PRADESH TECHNOLOGY DEVELOPMENT & PROMOTION CENTRE

Andhra Pradesh Technology Development & Promotion Centre (APTDC), set up with the objective of promoting competitiveness by leveraging Intellectual Property (IP), designed and delivered a series of capacity building programmes to foster an effective IP ecosystem in the region. Special workshops and training programmes were delivered in some key areas such as IP valuation and patent prosecution. The Centre also expanded its presence to provide IP services including search, analysis, drafting, filing and prosecution of patents, trademarks, industrial design, copyrights, geographical indications and other related services at affordable rates.

ADVOCACY

APTDC continued to pursue its objective of capacity building by sharing best practices in IP management. Constant engagement with policy makers as well as national and international agencies engaged in intellectual property management has helped improve the IPR environment in the region.

ACTION

In an interconnected knowledge-driven economy, patent data is increasingly being used in sophisticated analysis, helping experts investigate innovation, the advancement of science, and technology-related activities. Advances in computing power and accessibility of patent databases have expanded the possibilities of exploitation of patent information for strategic decision making.

In this backdrop it has become exceedingly important for related institutions to deepen their understanding of patent analytics and strive to achieve efficient use of patent information. The Conference of Intellectual Property Search & Analytics (CIPSA) thus provided insights into emerging challenges in the field of patent information and analytics and how it can be leveraged for creating, protecting, enforcing, and exploiting intellectual capital of an organisation.

A specialised hands-on workshop on Patent Prosecution, conceptualised in partnership with Lexorbis, provided in-depth understanding of Patent Prosecution for pharma/ biotech & chemical sectors. With the objective to enable participants to effectively handle patent prosecution matters, the workshop also shared strategies to avoid pitfalls and for better time and cost management. The participants interacted with the IPO Officials at the Intellectual Property Office (IPO) in Chennai.



Dr Tata Narsinga Rao, Associate Director, International Advanced Research Centre for Powder Metallurgy & New Materials (ARCI) at the Conference on IP Search & Analytics in Hyderabad



Visit of the CII Delegation to the Intellectual Property Office, Chennai for an Interaction with IP Officials

A knowledge intensive economy necessitates that organisations be aware of IP valuation processes and monetization possibilities to stay competitive. Complexity in IP valuation arises from its intangible nature, uniqueness of each IP and the lack of comparable matrices. The Workshop on IP Valuation, organised in association with Vajrasoft Inc, in Bengaluru & Mumbai, unravelled this enigma through key insights on understanding the context in which an IP was created and protected.

IPR Services

APTDC facilitated 262 plus IPR service requirements, from search to analysis, drafting, filing and prosecution, across the region, country as well as overseas. Industry, entrepreneurs, Government MSMEs, academia, R&D institutions, grassroot innovators and individuals benefitted from these services.

Intellectual Property Rights Services Facilitated in 2018-19

Category	APTDC
Patents	26
Trademarks	102
Designs	9
Geographical Indication	1
Office Action Responses	122
Total Fillings	262

TAMIL NADU TECHNOLOGY DEVELOPMENT AND PROMOTION CENTRE

Tamil Nadu Technology Development and Promotion Centre (TNTDPC) provides a range of intellectual property rights (IPR) services critical for sustained economic growth and technological development. TNTDPC supports and guides MSMEs, academia, entrepreneurs, start-ups and individual innovators from the State in accessing global markets by effective IPR protection.

Automotive Sector

The automotive sector megatrends of electromobility, autonomous driving, and connectivity have triggered long term changes to automotive design. India is well positioned to exploit the opportunities provided by these disruptions, given the growing maturity of the country's automobile industry and proven offshoring capabilities. In this landscape, as companies develop new technologies & design, IP protection will become ever more critical for automotive companies. In this backdrop, an Auto IP Summit was organised to build an IP culture in the sector. Pertinent issues such as IP aspects in future automobiles, future of IP litigation in auto industry, IP as a business for OEMs and the impact of IP protection on auto R&D were discussed and deliberated upon by experts with over 100 participants.



From L to R: X Arokianathan, Convenor, CII MSME Panel, Chennai Zone and MD, Vitech Enviro Systems Pvt Ltd; C N Shanshidara, Deputy Controller of Patents & Designs, Patent Office, Chennai and Shilpi Jha, Senior Legal Counsel for Intellectual Property-South Asia, Embassy of the United States of America at the Auto IP Summit in Chennai

INTELLECTUAL PROPERTY FACILITATION CENTRES

The Intellectual Property Facilitation Centres in Ahmedabad, Indore, and Mysore together strive to boost the IP culture amongst Indian MSMEs, technopreneurs and start-ups and to help them compete in global markets. Set up with the support of the Ministry of Micro, Small & Medium Enterprises (MoMSME), these Centres help MSMEs enhance and leverage their intellectual capital and meet international standards. This objective is achieved by building awareness on measures to protect ideas, IPRs and business strategies.

ADVOCACY

The three IPFCs together handheld several MSMEs, technopreneurs, start-ups and individual innovators in understanding, identifying and using intellectual property to their own competitive advantage. The Centres provide:

- IP protection & advisory services, IP awareness, training, and counseling
- Support for identifying IP in day-to-day businesses and leveraging these for business excellence
- A single window system for protection, incubation and commercialization of technologies, by aligning with the CII CoEs / TDPCs in different States

- Advise on infringements and opposition suits
- Brainstorming opportunities on IPR related issues.

ACTION

IPR Services

Having facilitated close to 275 IPR services, the three centres are encouraging intellectual property creation and its leverage as a business advantage. The Centres also assisted in 208 patent filings in India, 21 international patents through PCT, 856 TMs, 1500 Industrial Designs. The CII Brand Registration is also managed by the CII-IPFCs. Almost 82 copyrights applications, few GIs and 17 office action responses were managed by these Centres in 2018-19. In addition, the IPFCs maintain IP Portfolios of 12 corporates and conduct in-house IPR trainings.

The 2nd IPCON-2018 themed 'Resolving Technology, IP and IT Disputes through Alternate Dispute Resolution (ADR)' once again provided stakeholders an opportunity to discuss the nuances of developing a thriving IP landscape in the country.

The IP AWAKE Seminar series on Intellectual Property Rights helped members of the academia and MSMEs to understand how to protect their intellectual property and make it an asset for themselves.



From L to R: Anil K Pandey, Deputy Director and Head, CII-MoMSME IPFC; Lalit Jajoo, Industry Officer, District Industries Center; Amit Raval, Treasurer, Chitra Industries Association; Chetan Kamdar, Director, Bhavnagar Salt & Industrial Works Pvt Ltd; Suhas Kulkarni, Assistant Controller - Patents and Designs, DIIIT (formerly DIPP) and S P Bhatnagar, Department of Physics, Maharaja Krishnakumarsinhji Bhavnagar University at the IP AWAKE Seminar in Bhavnagar

CORPORATE - START-UP BUSINESS CONNECT AND FUTURE BUSINESSES

With start-ups a mainstream phenomenon in the country, India is increasingly becoming a global start-ups hub. A pressing need to create an enabling start-ups environment in the country is being felt, given the increasing number of graduates taking them up as a career option.

To engage with start-ups and provide the much needed handholding, CII advocated a collegium of futuristic business houses who's members will pledge to support start-ups and mentor them, arrange capital and/or buy back products/service.

The idea is to enhance the chances of success for the start-ups, generate more employment opportunities and create a robust culture of corporate-sponsored start-ups, leading to cross fertilisation of new ideas and innovations. These efforts are being steered by the National Start-Up Council and the National Council on Future Businesses.

ACTION

The Mission on Start-Ups to Moscow & Kazan was organised as a follow up on the Joint Declaration issued by Shri Suresh Prabhu, Minister of Commerce & Industry

and Civil Aviation and Mr Maxim Oreshkin, Minister of Economic Development, Russia. The delegation comprising members from Industry, incubators, investors, universities & start-ups participated in the first ever India-Russia Start-Up Summit held in partnership with the Skolkovo Foundation.

Experience shared by start-up residents in Kazan's Innopolis City and IT City, visits to Technopolis Moscow, Techopark Slava & Zyfra, the Innopolis SEZ Technopark and the Innopolis University were the other highlights. Mr Aleksey V Pesoshin, Prime Minister of the Republic of Tatarstan, Minister for Information & Communication, Republic of Tatarstan and Minister for Industry and Trade Promotion, Republic of Tatarstan also shared their perspectives with the Indian visitors.

Organised in partnership with the Maharashtra Industrial Development Corporation (MIDC) and KPMG as knowledge partner, Magnetic Maharashtra: Convergence 2018, saw the announcement of the Start-Up Awards. Shri Devendra Fadnavis, Chief Minister of Maharashtra and Shri Subhash Desai, Maharashtra's Minister of Industry felicitated MedPrime Technologies, CareNX Innovations and Bleetech Innovations who were



CII Delegation Members at Technopolis Moscow



Vipin Sondhi, Chairman, CII, Trade Fair Council and MD & CEO, JCB India presenting the JCB Award to Top Startup in Manufacturing at the CII Startupreneur Award Ceremony in New Delhi

adjudged the three best start-ups in the State. Selected from 6 finalists shortlisted from close to 600 entries, the three companies were also given a cash prize.

‘Corporate Connect’ is a novel approach to providing mentoring and handholding support to start-ups. It is based on the premise that when a large corporate house adopts one or a few start-ups in their own area of business, the start-ups are nurtured with specific knowledge and supported with adequate finance. In the process, the start-ups develop products or services or devise newer technologies for better efficiency or productivity. This opens the opportunity for the start-up to get integrated into the corporate’s supply chain and may also encourage investment into the start-up. A win-win approach, Corporate Connect puts forth a business proposition rather than a philanthropic one.

The ‘CII Startupreneur Award’, one of the most prestigious start-up recognitions from the corporate

sector is one step in the Corporate Connect programme. Start-Ups are recognised for their excellence in cutting edge technology & innovation, wealth creation, and employment generation. Eleven CII Members namely, Godrej & Boyce, Godrej Consumer Products, L&T, JCB, PI Industries, Infosys, Tata Steel, Bharti Airtel, Jubilant Lifesciences, Cyient, and Pratiksha Trust have committed to strengthen the start-up ecosystem by way of token financial support and mentorship to the winners. Chosen from the potential business partnership point of view, 11 winners were declared in 5 different categories: Women Start-Up of the Year, Start-Up of the year in Biotech/Pharma; Start-up of the Year in Manufacturing; Start-Up of the Year in Services and Start-Up of the Year in Agriculture & Food.

A compendium of Startupreneur Awards was also released at the Global Future Business Forum held in New Delhi.



Winner of the first Magnetic Maharashtra Convergence 2018 Start-Up Awards, Binil Jacob, Co-founder, MedPrime Technologies with Chief Minister of Maharashtra, Devendra Fadnavis in Mumbai

COMPETITIVENESS DEVELOPMENT SERVICES

Given the Government of India's strategic thrust to the manufacturing sector, through initiatives such as Make in India and Skill India over the past four years, the VLFM/CSM programme accelerated significantly, more than tripling the impact in a short span. In 2016, the then Department of Industrial Policy & Promotion (now DPIIT) recognised VLFM/CSM's contribution, with a special seminar in its landmark Make in India event in Mumbai.

The decade long ceaseless efforts of all stakeholders, including Government, academia, and the Industry contributed to nurturing over 5500 professional leaders from more than 2000 companies. Trained in Breakthrough Management techniques, these leaders have helped transform companies from a range of sectors such as engineering, consumer products, automotive as well as services.

Laying a strong foundation for VLFM, over 200 plus success stories have been documented over the last decade. The successes in new product development, new market creation and new business models amply demonstrate the uniqueness and power of this programme. The journeys of 57 Breakthrough Crusaders, drawn from 1000 plus graduates, who relentlessly pursued, implemented and shared some of the best practices learnt during VLFM/CSM programme were documented in 2018. The four volume publication was released at the 11th Learning Convention. Of these, 11 crusaders shared their stories in 5-minute video clips capturing their individual experience. These YouTube videos have received much appreciation from Industry, with one of them being viewed over 7000 times. Taking this initiative forward, Japan International Cooperation Agency (JICA) invited 6 of the breakthrough crusaders to Japan to share their success stories.

Gurukuls (Short Intensive Courses)

Initiated in partnership with DPIIT (formerly DIPP), NITIE, IITD in 2017, CII curated three Gurukuls for the PGPEX-VLM programme. Spread over a year, the Gurukul

provided high quality interventions on breakthrough management, vertical exploration of customers' latent needs and new business development processes through three day sessions. The faculty for these programmes is drawn from CII and Godrej, a Member company. A first batch of 17 participants underwent the training that followed the same rigor brought in by the JICA experts to the PGPEX-VLM Programme, being run by IITK, IITM and IIMC. The 2nd batch was launched in December 2018. IIM Calcutta also hosted a Gurukul on Innovation & New Business Development.

Senior Manager's Course

- 71 participants from 35 companies (including 7 new companies) from 28 cities joined batch 12 of the course
- The batch represented a wide range of industries, with participants nominated by companies from the auto components sector (27.3%), auto OEMs & capital goods sectors (21% each), consumer durables (8.1%), machine tools, engineering products (6.5% each) domestic appliances & textiles (4.8% each)
- The average work experience of batch 12 participants was 21.4 years, of whom 84% were senior managers

The annual visit to Japan by the batch provided an opportunity for insights into the Japanese Society and the manufacturing ecosystem and to gain an outsider's perspective to India.



From L to R: Katsuo Matsumoto, Chief Representative JICA India; Professor Shoji Shiba, Chief Advisor, CSM; Takeyuki Furuhashi, Chief Faculty, VSME Programme and Yuka Matsushiba, Programme Specialist, JICA India at Module 2 of VLFM Batch 12 in Gurugram

Graduates of VLFM Senior Manager's Programme (2007-2018)													
Years	Session												Total
	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	
Senior Manager's Course	48	48	48	51	60	80	55	59	59	60	66	71	705

Emerging India Camp

The Emerging India Camp, hosted in partnership with JICA, was a one-week workshop led by faculty from CII and the VLFM graduates. The Camp, designed exclusively for Japanese participants, was structured to give inputs on tools for new product concept/service while collecting real time data through field visits in local Mumbai markets. A simplified, experiential programme, it nullified the need for a common language.

The seven Japanese participants made home visits to understand customers and also learnt from the real life case of Godrej's Chotu Kool. Prototypes were presented to the Indian Industry, who gave feedback and insights into the way forward in the domestic market. The programme has been well received, and a similar camp is planned for next year, with increased participation from Japan.

Visionary SME Programme

TAFE, pursued implementation of the breakthrough VSME flow concept across its supply chain over the last four years. To showcase this flagship success of the VSME initiative, at an OEM, a VSME Open Factory Week was organised at TAFE, Madurai along with JICA. Over 150 managers from 20 Indian companies and 5 Japanese companies observed and learnt about the TAFE Execution System (TES). In addition, VSME outreach programmes were held at the Bengaluru plants of Harita and TAFE and Gabriel India, Gurugram.

Twenty large, medium and small companies demonstrated that it was possible to achieve market alignment while driving competitiveness by using the 'Flow' and 'Quality' concepts. These companies transformed themselves to meet customer requirements on time in a very highly efficient manner. Some companies were able to improve delivery performance from 79% to almost 100%, while improving productivity by 2.2 times. TAFE, a success story of 2018, achieved the highest productivity improvement of 6.5 times by aligning themselves to end customer. The company also reduced inventory by 62%, a global Industry benchmark.

Transitioning to the Future: CSM to VLFM – Sah Nirman

India and the Indian society have undergone significant transformation over the last few years. Especially remarkable has been Prime Minister, Shri Narendra Modi's visible thrust to introducing new schemes to trigger mindset change in Indian manufacturing. CSM is working to create a unique 'Indian Way to Value Creation' christened as 'VLFM – Sah Nirman'. The initiative aims to re-calibrate manufacturing strategies to remain relevant and stay ahead in a dynamic global system. The strategic intent behind VLFM-Sah Nirman is to propel India forward towards the overarching goal of global manufacturing leadership in harmony with the Government of India's schemes such as Make in India, Skill India and Start-Up India.



Inaugural Session of the VSME – Open Factory Week at TAFE in Madurai

SKILL DEVELOPMENT

With a large percentage of India's population joining the workforce every year, the Government, Industry and the academia have stepped up focus on skill development. Skills play a key role in eradicating poverty and enhancing the capability of the country to become a global player. Skill development thus requires interventions across three pillars of policy advocacy, research and on-ground initiatives. While the first two create an ecosystem for skilling, the on-ground initiatives link the youth to employment and livelihood. Pursuing these three pillars, CII's skill development initiatives came a full circle, linking over one million talented youth to Industry during the year.

ADVOCACY

Encouraging Apprenticeship

Apprentices play an extremely important role in ensuring inclusion of Industry-trained and Industry-ready talent pool in the ecosystem. Apprenticeship thus calls for proactive Industry participation. However, despite policy reforms rolled out through amendments to the Apprenticeship Act and introduction of the National Apprenticeship Promotion Scheme (NAPS), Industry adoption of apprentices continues to be low. In this

light, CII recommended that redeemable skill vouchers be given to students, especially school dropouts, that can be exchanged for training and apprenticeship by a company.

Creating a Pull for Skilled and Certified Talent Pool

Be it Central or State Governments, PSUs or Private players, billions of rupees are expended every year for acquisition of goods and services. Majority of procurement, especially large scale, takes place through contracts awarded to third party suppliers or service providers. This can be capitalised to create a pull for skilled and certified workforce. As per a CII recommendation, Industry is unable to recognise the financial benefits of hiring trained talent pool. Demand for such workforce can be created by earmarking clear target percentage of skilled and certified workforce for Government, PSU and Industry contracts.

Need to Increase Industry Volunteerism

While Industry's role in driving a skills ecosystem has intensified over the years, it leaves room for much more. Given the need for inclusion of over 8-10 million



From L to R: Ramji Prasad Neupane, National Programme Manager (NPM), Micro Enterprise Development Programme, Ministry of Industry, Commerce and Supplies, Government of Nepal; Finn Karlsen, Director, EUC Syd, Denmark; Erik Swars, Head of International Relations, Swiss Federal Institute for Vocational Education and Training; Soumitra Bhattacharya, Co-Chairperson, CII National Committee on Skill Development and MD, Bosch India Ltd; Dr Dev L Mohanty, Founder & Chairman, ASMACS Group, UAE and Graham Hasting Evans, Group MD, NOCN Group, UK at the 8th CII Global Summit on Skill Development 2018 in Lucknow



Santosh Kumar Gangwar, Minister of State (I/C) for Labour and Employment, addressing job aspirants and Industry during a Mega Job Fair at Bareilly

people in the working age bracket every year, Industry volunteerism is the need of the hour. Currently volunteerism is not recognised by the Ministry of Corporate Affairs as CSR. Greater Industry participation can be encouraged by including volunteered services, such as training of trainers, counsellors and assessors, under CSR. Industry volunteerism in this direction will enable skill development across the value chain.

Grading of Corporates on Delivering Skill Training

Over the years, Industry has played an extremely critical role in developing a skilled talent pool. While corporates invest their CSR funds to meet a desired requirement, they can scale-up training initiatives with support from Government funding.

A recommendation was made to consider funding of corporates by grading them based on their expertise and capacity to skill and scale. This will ensure pragmatic utilization of Government funding towards achieving the targeted skill numbers.

ACTION

A nationwide campaign to engage with Industry, Industry associations and other stakeholders of the skills ecosystem, was launched in partnership with GIZ. The objective was to drive greater participation in the National Apprenticeship drive, gather inputs about availability of skilled manpower at the cluster level and share best practices.

Global Summit on Skill Development explored best practices in creating a talent pool that is skilled to international standards. The challenges faced by India's skills ecosystem and the desired future skillsets were discussed. Partner Country for the Summit was Switzerland and the Governments of Uttar Pradesh and Andhra Pradesh were the two State Partners. It witnessed participation of over 600 delegates. The winners of WorldSkills India 2017, who were felicitated by winners of SwissSkills 2018, also engaged in a friendly competition at this platform. The competition was organised under Beauty Therapy Trade, with support from NSDC and B&WSSC.

The Exhibition, on the sidelines of the Summit hosted over 40 exhibitors. MoUs were also signed with Ola Skill Academy, The Danish Consortium for Vocational & Educational Training (Denmark) and Lausanne Hospitality Consulting (Switzerland) to provide international-level training in Hospitality.

The Annual CII India Skills Report presents a quantitative and qualitative analysis of demand and supply in the labour market. A joint initiative with PeopleStrong, and Wheebox, this report is supported by AICTE, AIU and UNDP. The 2019 edition suggests that India's youth has made significant improvement of 15% over the last 5 years, achieving 47% employability. Nationally, engineers emerged as more employable than MBA graduates; female employability registered an 8% improvement over the previous year, while male employability improved by a percentage point.

Model Career Centres

A Model Career & Skilling Centre was launched in Rewa, Madhya Pradesh, taking the number of such centres to 5. The reach was further extended with the Project Management Unit (PMU) for Youth Employability Service (YES) centres being set up in 29 districts of Karnataka. These centres together counselled, provided soft skill training and conducted psychometric assessments of over 230,000 youth and helped more than 80,000 get placed by linking the youth to the Industry.

Of the 15,000 girls of SNDT University, Mumbai who were counselled, 7,000 were provided internship and placements. More than 30,000 girls from Andhra Pradesh, Delhi, Haryana, Karnataka, Maharashtra, & Telangana benefitted from the online counselling/guidance initiative. Volunteers from companies such as Google, NYCS, Bhumi, Cognizant, HPCL, Xaviers, Somaiyya amongst others, counselled the youth. Internship opportunities were also offered to MSBTE students across Maharashtra.

Over 40 Job Fairs conducted in partnership with the State and institutes witnessed large Industry participation. The Annual Regional and National WorkSkills Competition, designed to promote excellence, saw participation of 750 competitors in 35 trades.

The first ever skills competition Naipunya and Mahakaushalya were hosted alongwith the Skill Development Corporation of Andhra Pradesh and

Maharashtra respectively. Of the 1000 participants who competed in four clusters in Andhra Pradesh, 14 were selected for the National Indiaskills Competition 2018. Ten competitors from Maharashtra will join the Gold Medal winner from Andhra Pradesh in representing India at the WorldSkills 2019 Competition in Russia.

The three workshops on high precision arc welding technology held along with AOTS Japan helped in upskilling and improving the global competitiveness of Indian Industry. The other partners from Japan included the Kansai Economic Federation and METI, Japan. Supported by Panasonic Welding System Co. Ltd. (PWSI), Kobelco and Iwatani, the workshops witnessed participation of over 45 MSMEs, heavy manufacturing industries, fabricators and various welding institutes.

The 30 CII–PanIIT Skill Gurukuls set up in partnership with Pan IIT Alumni Reach for India (PARFI) located in backward district continued to operate on the self-sustainable model with 100% placement.

As the Sending Organisation under the Indo-Japan Technical Intern Training Programme (TITP) CII is delivering the pre-departure documentation for the 30 interns placed under Batch 2 and 3. A programme of the Ministry of Skill Development and Entrepreneurship (MSDE), under TITP, CII has been entrusted with the responsibility of identifying and training youth from ITI or Polytechnic backgrounds for 1 to 5 years in Japan. Hailing mostly from villages of Tamil Nadu, these youth will earn almost INR 60,000 to 65,000 per month.



Dharmendra Pradhan, Minister for Skill Development & Entrepreneurship (MSDE) and Petroleum & Natural Gas, felicitating the first batch of interns trained by CII, being sent for the Indo-Japan Technical Intern Training Programme (TITP) in New Delhi

HUMAN RESOURCE DEVELOPMENT

The World of Work is transforming rapidly, with accelerated digital transformation aided by the advent of automation, robotics, AI & IoT. Raising huge organisational challenges for talent management and Human Resource (HR) practices, the emerging landscape is giving rise to unprecedented risks that may result in disruptions in the workplace. It is also leading to a constant evolution in HRM's role from the traditional policy development, paperwork, managing employee benefits and handling employee complaints. In this context, the CII National Committee on Leadership and HR's predominant agenda remains facilitating organisations and their leadership to succeed in a rapidly changing business environment. The specific focus is on the 'New World of Work' and its impact on jobs, career landscapes, new workplace demography and its overall impact on HR Leaders and employees.

ACTION

The New World of Work

8th CII National HR Conclave 2018

The 8th CII National HR Conclave 2018, themed Rise to the New World of Work, deliberated upon ways to institutionalise closer links between company boards and the HR function, especially for enabling seamless integration of the organisational aspirations and governance with people and processes. The other topics of discussion included employee wellbeing & productivity and the changing L&D landscape. Deliberations on creating unique employee experiences becoming a new normal in employee engagement was of particular interest to practitioners and Industry leaders alike.

Three papers, released at the Conclave, also seeded new thoughts and ideas in the HR space:



Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd and T V Narendran Chairman, CII National Committee on Leadership & HR and CEO & MD, Tata Steel Ltd at the 8th HR Conclave in Mumbai



From L to R: Rajesh Padmanabhan, Director and Group CHRO, Welspun Group; Sanjay Behl, CEO, Raymond (Lifestyle) and Rajkamal Vempati, Head- HR, Axis Bank at the 8th HR Conclave in Mumbai

Re-imagining Work in the Age of Digital Disruption

A Study titled Rise to the New World of Work-Re-imagining Work in the Age of Digital Disruption, undertaken with Accenture, focused on the changing concept of work and its implications for the workforce. This joint study reflected that 49% business leaders believe that human-machine collaboration is important to achieve strategic priorities, while 62% expect sharing of roles requiring AI collaboration to increase over the next three years.

Gig Economy-What We Know and What We Don't

As emerging technologies become all-encompassing and entwined in daily work regime, digitized businesses have created a new breed of dynamic workforce i.e. gig workers. A study was presented in association with PeopleStrong focused on this emerging workforce - Gig Economy - What We Know and What We Don't. The study highlighted the need for India to focus on the Gig Economy not only to align with the new work codes but also because of its potential to impact employment, improve organisation competitiveness, as well as promote diversity and inclusion.

Creating Unique Employee Experiences- The New Normal in 'Employee Engagement'

A study on Creating Unique Employee Experiences – The New Normal in 'Employee Engagement' was presented in partnership with People Business. This study elucidated drivers of creating unique employee experiences through customised systems and processes. The study also emphasised the need for organisations to acknowledge and accommodate distinct expectations of different types of workers, while attempting to create and support compelling employee experiences.

Power of HR Analytics

A Webinar Series on Leveraging the Power of HR Analytics was organised in an endeavour to provide interactive, web-based learning and problem solving sessions. HR practitioners conducted webinars on topics such as application of analytics in the HR function, analytics towards improving quality of hiring, building predictive capability through HR analytics, leveraging analytics to enhance employee engagement and the pitfalls and opportunities in implementing analytics. Live functioning of HR Analytics tools was also demonstrated to participants from over 50 organisations from across the country.

The CII HR Excellence Model- Paving the Way for Excellence in HR

A National HR Excellence Framework has been developed with the mandate of facilitating reinforcement of 'people processes' within organisations across industries. The model follows a three pronged approach with focus on assessments, awards and capacity building.

9th CII National HR Excellence Award 2018-19 -Achieving Excellence in HR Processes

Following an Industry acclaimed and rigorous process, the 9th CII National HR Excellence Awards continued to recognise organisations that achieved exemplary HR performance and practices. Organisations were assessed on the 'HR Excellence Model' that encourages them to strive towards achieving distinction within the framework of their own process improvement goals, rather than compete against each other. The Awards are given in three categories – Prize for Leadership in HR Excellence, Significant Achievement in HR Excellence, and Strong Commitment to HR Excellence. This year's Prize for Leadership in HR Excellence was conferred on Amara Raja Batteries, Bharat Petroleum Corporation, Bosch Ltd and CESC.

Assessor Training Workshops

Senior managers from the Industry are selected as Assessors for the assessment, in an effort to catalyse development of an ecosystem for adoption of the HR Excellence Model. Selected assessors undergo intensive training workshops on the CII National HR Excellence Award Model Assessment Process to enable an understanding of the award criterion and assessment process. The workshops also helps in the development of internal facilitators for organisations to adopt the CII HR Excellence Model. Three such CII HR Assessor Training Workshops were held in Bengaluru, Delhi, and Mumbai. Over 100 assessors were trained under this model during the year.

9th CII National HR Excellence Award Confluence 2018-19-Learn From the Winners

At the Annual HR Excellence Award Confluence, comprised a seminar based on the theme Learn from the Winners. Past winners of the HR



Adi Godrej, Past President, CII and Chairman, Godrej Group at the 9th CII National HR Excellence Award Confluence 2018 in Mumbai



Bharat Petroleum Corporation Ltd receiving the award for Leadership in HR Excellence at the 9th CII National HR Excellence Award Confluence 2018 in Mumbai

Excellence Award and Assessors who are senior HR leaders and have been an integral part of the of HR Excellence Award process, shared their perspectives on best practices at the Seminar. With the objective to propel organisations towards creating and sustaining a culture of Excellence in HR the sessions focused on four aspects of leadership development, HR strategy, learning & development and employee wellbeing & engagement. The importance of the assessment process in the journey of achieving HR Excellence by helping organisations bridge the gaps and enabling assessors to become ambassadors of HR excellence within their organisations was also emphasised.

INDUSTRIAL RELATIONS

Given that Industrial Relations & Labour Law reforms are major drivers for creating an enhanced employment landscape, the Government of India has launched a slew of labour and governance reforms. Aimed at improving the business competitiveness and labour market flexibility, these include amongst others the Codification of Labour Laws, reforms to enhance female labour participation, Pradhan Mantri Rojgar Protsahan Yojana (PMRPY), online licensing and compliance, permitting self-certification, MUDRA Yojana with Fixed Term Employment.

CII makes efforts at both policy advocacy as well as capability building, to help create a conducive environment for transformation of the industrial workforce. This agenda is driven by the CII National Committee on Industrial Relations and The Industry-Trade Union Dialogue Forum. Much of the advocacy efforts towards worker wellbeing and improving Ease of Doing Business are delivered in collaboration with Ministry of Labour & Employment and its various implementation arms i.e. EPFO, ESIC, PFRDA.

ADVOCACY

CII's Industrial Relations efforts are directed at strengthening communication between key stakeholders including industry workers, Industry and the Central and State Governments.

The Fixed Term Employment (FxTE), a CII policy recommendation, was notified by the Ministry of Labour & Employment (MoLE) in 2018. The framework enables employers to engage workers directly on the rolls of the company for a pre-defined period, in case of short-term/one-time demand. This ensures that employees get all statutory benefits and working conditions at par with the permanent workman. With a view to expanding its applicability, Chief Ministers and Labour Secretary of 24 States were briefed on the benefits of FxTE for both workers and employers. Based on a CII request, the MoLE issued a letter to the State Governments/UTs to consider making amendments to incorporate the FxTE in the State Standing Orders. Various workshops were organised to sensitise Industry on the benefits of engaging the workforce under Fixed Term Employment.



From L to R: D L Sharma, MD, Vardhman Yarns & Threads Ltd; Dagmar Walter, Director, ILO – DWT for South Asia; M S Unnikrishnan, MD & CEO, Thermax Ltd and Chairman, CII National Committee on Industrial Relations; Sunil Barthwal, Central Provident Fund Commissioner, EPFO and Virjesh Upadhyay, National General Secretary, Bharatiya Mazdoor Sangh at the launch of CII – EPFO Helpdesk at the CII Industrial & Employee Relations Summit 2019 in New Delhi



From L to R: Ashish Gautam, Associate Director, IBM India Pvt Ltd; Suresh Dutt Tripathi, Vice President-HRM, Tata Steel Ltd; Pradeep Bhargava, President, MCCIA and M S Unnikrishnan at the 3rd Meeting of CII National Committee on Industrial Relations in New Delhi

In March 2018, after receiving stakeholder comments, MoLE published the revised Labour Code on Social Security, that amalgamates 15 existing Social Security Laws. Considering the financial implications of the Code, a recommendation for a phased roll out of the Law was made to the Government. For example, the Government was requested to commence the rollout with SEC III & IV workers, who are unable to contribute to and are currently out of any social security coverage. Based on CII recommendations, MoLE introduced a new draft that focuses on the social security of unorganized workers.

To incentivise the entities under the Maternity Benefit (Amendment) Act 2017, Government of India will reimburse seven weeks wages to the organisations for employing women employees earning less than INR 15,000 per month and not covered by ESIC, but holding at least a year of EPFO membership. The submission to the Government was focused on encouraging women employment across levels by removing the cap on salary and reimbursing 14 weeks salary to MSMEs.

Trade Union Amendment Bill, 2018

Trade Union Amendment Bill, 2018, an amendment to the Trade Unions Act, 1926, is for the recognition of Trade Unions. It provides a legal procedure for registration of Trade Unions. It defines laws applicable to them. The need to extend or modify the Preamble as per the proposed amendment and to clarify the meaning, definition, rights, procedure and duties of recognized unions was highlighted to the Government.

ACTION

Though Industrial and Labour Laws have undergone substantial reforms, several challenges still need to be addressed to enhance industrial productivity. Technology has significantly impacted the industrial

relations paradigm, with digitization shifting focus to re-skilling and mid-career transition. The Industrial & Employee Relations Summit 2019 thus aimed to understand constraints and legal technicalities in implementing key reforms and evolving strategies and solutions to overcome upcoming challenges.

To strengthened the communication between Industry & Employee Provident Fund Organisation (EPFO), CII - EPFO helpdesk has been launched. The platform addresses the queries registered by Industry Members related to EPFO through MyCII Portal. The queries are moderated by the CII team and accordingly either a reply is furnished or forwarded to the Nodal officer of EPFO for further necessary action. A series of webinars was delivered by senior official of the Ministry of Labour & Employment, Central Provident Fund Commissioner (CPFC), EPFO to create awareness on recent reforms in labour laws and governance, encourage participation and enable Industry to avail benefits of various schemes.

The Industry-Trade Union Dialogue Forum

The Industry-Trade Union Dialogue Forum continued to encourage dialogue between Industry and trade unions on issues pertaining to industrial relations. While CII hosts the secretariat for the Forum, it remains a neutral body facilitating direct engagement between employer organisations and trade unions. The Forum encouraged adoption of best practices while acting as a catalyst for enabling transformation of the IR ecosystem. Deliberations on the financial implications of the Labour Code on Social Security for both Industry and workers were organised during the year. A structure for extending the current social security system to all workers in the country is being identified, while addressing the issues and challenges in its roll out.

CONNECTING WITH SOCIETY



- › Affirmative Action
- › Aspirational Districts Development
- › CII Foundation
- › Development Initiatives
- › Sports
- › Youth Power
- › Indian Women Network



AFFIRMATIVE ACTION

There is little doubt that inclusiveness and competitiveness are the two key pillars of India's march towards prosperity. These two factors are largely interdependent and one cannot be achieved without fostering the other. CII thus continues to remain a strong proponent of equal opportunity to promote a socially cohesive and equitable Indian society. Recognizing the economic and social potential of inclusion for the Scheduled Castes (SCs) and Scheduled Tribes (STs), CII has, since 2006, spearheaded collective Affirmative Action by Indian Industry.

Several Members have aligned to CII's Code of Conduct for Affirmative Action and have imbibed the guiding philosophy in this regard. A series of recent initiatives gave a fillip to Affirmative Action during the year.

EDUCATION

Over the years, CII Members have provided scholarships to more than 1.65 lakh SC/ST students for higher education through the FAEA. Five Model Career Centres, one each in Bareilly, Chennai, Gurugram, Mumbai, and

Reva, offer career counselling and guidance to young aspirants from underprivileged sections of society.

ENTREPRENEURSHIP

Through the Dalit Indian Chamber of Commerce and Industry, Dalit entrepreneurs were linked to Member companies, for exploring supplier opportunities. The Buyer-Seller Meets in Bengaluru, Bhubaneshwar, Delhi and Pune helped 660 participants in connecting with Member companies. Two hundred first-time SC/ST entrepreneurs got an opportunity to learn from the very best in IIM-Bangalore, IIM-Calcutta, IIM-Lucknow, IIT-Madras, IIM-Raipur, University of Mumbai and the Symbiosis Institute of Business Management.

Training programmes were conducted through the Tribal Indian Chamber of Commerce (TICCI), under the aegis of the Department of MSME, for ST entrepreneurs to address their financial and technical issues. CII organised Interactive Sessions for exploring opportunities with ST Entrepreneurs and also organised the Tribal Development Meet in Jharkhand.



Raghubar Das, Chief Minister of Jharkhand at the Tribal Development Meet in Ranchi



Interactive Session with Scheduled Tribe Entrepreneurs in Sonari, Jamshedpur

EMPLOYABILITY

Improving the employability of India's educated youth remains a key concern of the Government. Several skill development initiatives were thus delivered to empower the youth with skills that the Industry requires. Over 3.2 lakh SC/ST candidates have undergone a variety of skill development programmes at the skill hubs, pan-IIT skill gurukuls, finishing schools and training centers.

Besides, these Model Career Centres help youth to register their resumes on the National Career Portal set up by the Ministry of Labour and Employment. CII is in the process of setting up 45 additional Model Career Centres, thereby providing on ground support to the deserving candidates.

EMPLOYMENT

CII's manpower mix surveys launched in 2011, aim to provide insights into the manpower composition in Member organisations. As a result of the sensitization workshops and webinars, gainful employment was provided to an additional 119,788 SC/ST candidates by Member organisations during this period.

To accelerate India's transformation into a vibrant, inclusive and dynamic economy by capitalising on the strength of its immense labour reservoir, the regional conference on affirmative action encouraged companies to pay special attention to the issues in this area. The objective was to help unleash and develop the vast, underutilized human talent that India is home to.



CII training Sitalpati artisans in Coochbehar, West Bengal

ASPIRATIONAL DISTRICTS DEVELOPMENT

Transformation of Aspirational Districts Development programme, launched by the Prime Minister of India in January 2018, is a policy priority for the Government of India. Anchored by the NITI Aayog, the programme has identified 117 aspirational districts in 28 States.

The CII National Committee for Aspirational Districts Development continued to work in aspirational/backward districts and encourage Members to undertake development work for the benefit of local communities. Efforts were made in 29 districts in 23 States, in collaboration with NITI Aayog, district administrations, and other relevant entities such as Tata Trust. Several initiatives were launched across aspirational districts, in education, skill development, livelihood generation, healthcare & nutrition, sanitation & hygiene, water and agriculture amongst others.

ACTION

Education

During the year, interventions towards providing quality education, encouraging e-literacy, improving school infrastructure, making schools safer and teacher training, were launched. These efforts were driven in more than ten aspirational districts across the country.

Skill Development

Of the 30 Skill Gurukuls, set up in partnership with PAN-IIT Alumni Reach for India (PARFI), some are based in the aspirational districts of Chhindwara, Dhenkanal, Kalahandi, Khammam, Muzaffarpur, Ramanathapuram, East & West Singhbhum, as well as some districts in Jharkhand. In addition to the trainings at the skill development centres, several technical and non-technical training programmes were delivered in partnership with corporates, in close to 20 aspirational districts.

Livelihood Generation

While the job fairs helped India's youth obtain jobs, alternative livelihood opportunities were provided through trainings in areas such as fishing, seaweed farming, cultivation, preservation & export of sea food

and handicraft. Livelihood opportunities were created for BPL candidates, women, widows and disabled beneficiaries by helping them set up kirana stores, tailoring units, raising livestock, constructing spinning centres and training for herb plantation.

Healthcare and Nutrition

Healthcare facilities offered in rural as well remote areas of Baramulla, Haridwar, and Khammam included mobile healthcare, health camps, campaigns on healthcare & menstrual hygiene and free medication.

Sanitation and Hygiene

Cleanliness drives, toilet construction and waste bin distribution formed a part of the sanitation and hygiene drive in some of the aspirational districts including Cuddalore, Fatehpur and Mewat amongst others.

Water

Given that the water crisis in India is looming large, and the economic growth of regions is limited by the availability of water, CII used its unique WATSCAN tool in various aspirational districts to assess the water situation. Other initiatives in this area of intervention included the WaSH project (Water, Sanitation and Hygiene), water purification and restoration of water bodies.

Agriculture

Training farmers on organic cultivation, farming mechanization & soil cultivation, solar farming, rotational cash crop and bee-hive cultivation were undertaken in select aspirational districts.



1st Meeting of the National Committee for Aspirational Districts Development in New Delhi

CII FOUNDATION

The CII Foundation (CIIF), having worked in education, sanitation, skills & livelihoods, women empowerment and disaster relief & rehabilitation over eight years, deliberated on the next five-year strategy in 2018-19. Having re-strategized, the Foundation focused on three key areas - environment & climate change resilience, women empowerment and early childhood education by engaging with corporate donors and grassroots implementation partners.

Several new initiatives were launched towards the three pillars of fresh approach and the existing programmes were given a renewed thrust. Working on the environment and climate change resilience pillar, a very special initiative on crop residue management was launched in select villages of Patiala and Ludhiana districts in Punjab. The Woman Exemplar Programme continued to recognise and empower grassroots women leaders who contributed significantly in the fields of education, health and micro enterprise. Industry support was sought to take the Model Anganwadi Centres project forward.

ENVIRONMENT AND CLIMATE CHANGE RESILIENCE

Crop Residue Management Initiative

A pilot intervention to promote alternative technology for crop residue burning and creating awareness amongst farmers not to burn stubble was initiated in



Launch of Sukh da Saah, CII-SIAM initiative on Crop Residue Management in Jasso Majra village, Patiala

19 villages in Ludhiana and Patiala districts in Punjab. The project was implemented in association with the Department of Agriculture and Farmer Welfare, Government of Punjab, Punjab Agricultural University and Punjab Pollution Control Board and supported by ReNew Power, ONGC, Birlasoft and Cummins. In Patiala, the project was implemented in partnership with Society of Indian Automobile Manufacturers (SIAM).

The awareness campaigns and positive messaging resulted in more than 80% farmers adopting in situ technology and 12000 acres of land becoming stubble-burning free. This being the first time farmers adopted a no-burning approach, with use of in-situ solutions, many took a calculated risk to test the results. Going forward, the positive results of the interventions, such as mulching, are expected to lead to sustained practice and a cascading impact.

In-depth research on technological alternatives, innovative project models and village level ex-situ solutions to enhance knowledge and action are being developed in collaboration with CII-ITC Centre of Excellence for Sustainable Development. A comprehensive farmer level survey in Patiala and Ludhiana has been undertaken to understand farmer perception of stubble burning. Some participating companies such as Ambuja Cements, Honeywell, Bharat Petroleum Corporation, Reliance Industries, Ralson India, ITC and CLP India visited the farms where this pilot project was implemented. Discussions on solutions to management of crop residue were facilitated at the national and state-level.

Water Resource Mapping, Planning and Conservation using WATSCAN Tool

A project was launched to augment water supply and manage demand through behaviour change interventions in four water scarce villages of Aurangabad, Maharashtra. Undertaken in partnership with CII-Triveni Water Institute (CII-TWI) and support

from Standard Chartered Bank, the project is based on scientific analysis and customized solutions. Through behaviour change activities and campaigning, the Foundation aims to help farmers optimise the use of available water.

Restoration of Water Bodies

Initiatives aimed at reviving lakes and other water bodies and building climate resilient cities were rolled out in partnership with the Industry and city Government bodies. Under this project, efforts were directed at mapping water resources & drainage channels; addressing pollution & garbage dumping; enabling eco-restoration & afforestation and creating awareness for stakeholder engagement to enhance participation of local communities. In response to the 2015 Chennai floods, three lakes were completely restored and handed over to the local community & Government. While seven more lakes are under restoration, the plan is to recover 21 more lakes by 2019. The initiative is supported by Industry partners including Grundfos, GMMCO, Danfoss, Pon Pure Chemicals amongst others.

WOMEN EMPOWERMENT

Woman Exemplar Program

The Foundation continued to recognise and support extraordinary women who have made significant contribution to community development in specific fields. The Woman Exemplar Program (WEP), intended for last-mile grassroots level underprivileged women, encourages those who have excelled as social change leaders in education, health and micro enterprise.

In 2018, three social transformers joined the league of Women Exemplars who have transcended innumerable challenges to become true exemplars. These women are amongst the harbingers of positive change of their communities. The 20 women finalists of the WEP 2017 and 2018 underwent a 3-day capacity building workshop in areas such as personal leadership, fund raising and networking. The women exemplars, as role models, continue to actively participate in several CII initiatives, such as the CII National CSR Summit 2018 and the Seminar on Women's Health.

EARLY CHILDHOOD EDUCATION

Recognising the fact that early childhood education plays a critical role in determining a child's life outcomes, Early Childhood Education (ECE) was identified as a key area of work. The Foundation continued to engage with State Governments and pool Industry efforts to create Model Anganwadi Centres. The focus was on providing additional nutrients to children in these centres, strengthening infrastructure, building capacities of Anganwadi workers and engaging the community in daily operation of Anganwadis.

Over 700 beneficiaries received assistance under the corporate support and from adoption of 22 Anganwadi Centers in Kolkata. Anganwadi workers were trained on the importance of nutritional assessments, nutritional supplements and early childhood education. They were also given inputs on child psychology, child centered approach, School Readiness Instruments (SRI), use of educational kits and monitoring child development.



From L to R: Shobana Kamineni, the then President, CII and Executive Vice Chairperson, Apollo Hospitals Enterprise Ltd; Munni Begum, Woman Exemplar 2018 in Education Category; M Venkaiah Naidu, Vice President of India; Rakesh Bharti Mittal, then President-Designate, CII and Vice Chairman, Bharti Enterprises and Uday Kotak, then Vice President, CII and MD & CEO, Kotak Mahindra Bank Ltd at the Woman Exemplar Program Award Ceremony in New Delhi



Capacity Building Workshop for grassroots women leaders in Gurugram

The adopted centres were painted with lead free paint and equipped with ECE kits and child friendly toys. Portable toilets were installed in some Anganwadis and in others the existing toilets were altered to make them child-friendly and hygienic.

Going forward, the plan is to roll out the project in Delhi, Jammu & Kashmir, Karnataka and West Bengal with a focus on strengthening early childhood education.

OTHER INITIATIVES

Disaster Rehabilitation and Response

In immediate response to the 2018 Kerala floods, CII and CIIF worked with the State administration to provide basic necessities to the affected people. Three command centres were set up in Chennai, Kochi and Thiruvananthapuram and 60 relief camps in 10 districts provided aid to over 20,000 families. Long term rehabilitation interventions are being envisaged in consultation with local Government authorities.

UP Development Initiative

Construction of household toilets was launched in 11 villages in Fatehpur district, in partnership with the Uttar Pradesh Government. As part of the Buniyadi Suvidha in Schools campaign, CII Foundation provided furniture for students in Government Schools in Allahabad. The initiatives covered 15 Primary Schools

and three Kasturba Gandhi Balika Vidyalaya, reaching out to more than 3300 beneficiaries.

Universal Access to Sanitation

In the third phase of Mission SoS, CIIF engaged with community, Industry, and urban local bodies to construct 20 public toilets in Delhi NCR. The initiative also covered 100 schools in Rudrapur district of Uttarakhand. To encourage use of toilets, students were appointed as ambassadors of hygiene, after formation of 83 student clubs in schools.

A coalition of private players in sanitation was catalysed, in partnership with the International Toilet Board Coalition. The goal is to trigger a robust business sector and deliver universal access to sanitation.



Farmer Training in Aurganabad, Maharashtra

DEVELOPMENT INITIATIVES

Folding in a billion plus Indians into the growth process is a key concern for both Indian policy makers as well as the Industry. In this light, over the last few years, a noticeable shift has taken place from subsidy-based programmes to those enabling income generation. There is also a growing consciousness and conviction amongst companies that businesses have dual roles-to create shareholder value as well as play a proactive role in the communities in the environment where they operate. To help accelerate this process towards inclusive and sustainable growth, CII works with Governments, Industry and civil society organisations. Efforts are directed at enabling Members to meet their social development commitments, alongside their business aspirations.

ADVOCACY

In pursuit of delivering inclusive and sustainable growth, CII encouraged collaborative Industry action through large scale, high impact interventions. Efforts were made to create an enabling ecosystem, with measurable impact and to promote & educate companies on innovative and impactful CSR models. Promoting Industry engagement towards inclusion, specially of

persons with disabilities, continued to remain the focus of development initiatives.

In 2018, the Ministry of Corporate Affairs constituted a high-level Committee on Corporate Social Responsibility to review the CSR Legislation. The committee was requested to consider allowing companies to comply with the provisions in a manner best suited to each one of them. It was emphasized that an enabling CSR framework, rather than a prescriptive one, would help Industry develop pioneering strategies and undertake meaningful CSR initiatives in a self-responsible manner. Widening CSR's scope to include additional intervention areas, rather than constraining it to Schedule VII of the Companies Act, 2013, was also suggested.

The Industry view on draft of Indian Standards on CSR, that it was too early to introduce additional CSR standards for corporates, was conveyed to the Bureau of Indian Standards (BIS). The belief is that MCA's efforts at setting up a National CSR Data Portal and National CSR Awards will be more effective alternate mechanisms to promote CSR. These would maintain CSR's voluntary nature, while creating a system of recognition & honour.



From L to R: Ramanan Ramanathan, Mission Director, NITI Aayog; Shweta Khurana, Director-Corporate Affairs Group, INTEL; Sunish Jauhari, India Leader, Ashoka; Uma Mahadevan, Principal Secretary, Women & Child Development and Empowerment of Differently Abled and Senior Citizens Department, Government of Karnataka; Ajit Jha, Editor, India Today; Rachna Panda, Chief Communication Officer, GE and Anand G, Editor, The Children Mail at the Panel Discussion at the National CSR Summit 2018 in New Delhi

ACTION

Corporate Social Responsibility

With the CSR legislation completing 5 years since its promulgation, several companies have gone through at least one CSR project cycle. In 2018-19, CII directed efforts towards encouraging companies to be impact oriented, with a focus on initiatives aimed at making an integral contribution to development.

Possibilities of corporate engagement towards replicating and mainstreaming Natural Resource Management (NRM) models through CSR was explored. A Roundtable brought together the key stakeholders to promote, present and demonstrate pilot models, driven under the GIZ-NABARD Umbrella Programme for Natural Resource Management (UPNRM). Companies were offered the opportunity to partner with Ministry of Railways on specific projects on Digital India and Swachh Bharat. Rail Sahyog, an e-platform, was launched to foster such partnerships, co-create projects, encourage collaborative engagements between the Railways & the corporate sector and undertake projects with potential to make a positive impact on the entire social ecosystem.

At the National CSR Summit, themed Re-Imagining CSR, Shri P P Chaudhary, Minister of State for Corporate Affairs emphasised the fact that impact orientation, innovation and integration hold the key to the future of CSR. The discussions revolved around the Industry's growing footprint on the social development map; using CSR funds to experiment with innovative solutions for development challenges; leveraging technology to enable innovation and making collaborative efforts for large scale & sustainable impact.

Special Abilities

CII continued to work tirelessly towards mainstreaming Persons with Disabilities (PwD) into the workforce, by sensitizing Members, assisting them with hiring processes, conducting advocacy programmes to build champions within the Industry and promoting barrier free workplaces.

In January 2019, a first of its kind national-level platform, India Business Disability Network (IBDN), was launched in collaboration with EFI and ILO at the CII National Conference on Mainstreaming Inclusivity & Accessibility – Enabling Industry. The IBDN is a National Business

Disability Network to positively impact the inclusion ecosystem. It is a one of its kind Network to engage, enable and empower people with disabilities, by promoting and facilitating an inclusive, accessible and a barrier-free workplace within the corporate sector.

The Network will not only promote employment of PwDs while responding to the needs of the private sector, but also provide a common platform for companies' mutual learning and engagement with other stakeholders. IBDN is a one stop solution to share best practices, create context-based solutions, facilitate partnerships, facilitate inclusion; and create & disseminate knowledge. During the National Conference, policy measures and ideas for creating an enabling environment and inclusive workplaces was shared by those who have already championed the cause in their companies.

A series of knowledge webinars provided a platform for stakeholders to understand Government policies and Industry best practices that promote inclusion at the workplace, career progression of PwDs and increase the includability quotient of leaders. A new videologue series, 'Breaking Barriers-A CII Campaign Towards Inclusion of PwDs', was launched to showcase and promote inclusive practices adopted by some companies and NGOs. Short films for this fortnightly series were sourced from companies and partner organisations who have been champions in the PwD inclusion space.

A research study of companies practising inclusion and employing PwDs in their workforce, is underway. The objective is to showcase impact of diversity and inclusion practices on overall performance and productivity of companies. Twelve companies across manufacturing, retail, e-commerce, hospitality, logistics and BFSI are participating in this study.



From L to R: Praveen Tattavarthi, COO, Allegis; Pavithra YS, MD, Vindhya E Infotech; Pankajam Sridevi, MD, ANZ Banking Group; Shanti Raghavan, Founder, Enable India and Gopal Singaraju, COO, Royal Bank of Scotland at the National Conference Mainstreaming Inclusivity & Accessibility – Enabling Industry in New Delhi

SPORTS

The important influence that sports make on children, especially in their formative years, cannot be undermined. The significance is heightened by their potential to deliver encouraging performance at international sporting events. CII thus embarked upon a journey of making sports a necessary and daily part of lives, especially for children, with an aim to ensure their holistic development and to widen the pool of individuals participating in sports. Pursuing the vision to have India's 300 million children playing for 60 minutes everyday, sports were evangelised to both, the private sector as well as policy makers. Given that funding, investment and corporate participation are key to giving a thrust to achieving this vision, specific emphasis was laid on these aspects. During the year, efforts were made to propagate a workable model with the Central and State Governments, and partners identified for implementing sports in schools. The efforts revolved around popularizing physical education in schools, changing stakeholder mindsets towards sports and generating investment for this sector.

ADVOCACY

Numerous studies have validated the positive influence of sports on students' academic achievements. Results have shown that children active in sports are more likely to achieve higher learning as well as higher grades. Contributing to physical, emotional, and intellectual development of children, they also help build

confidence, encourage social behaviour and are a tool for social inclusion.

Making a paradigm shift in the conceptual design of school education, the Ministry of Human Resource Development (MHRD) launched the 'Samagra Shiksha' scheme. It treats 'schools' holistically as a continuum from pre-school, through to the senior secondary level. The scheme was prepared with the broader goal of improving school effectiveness, measured in terms of equal opportunities for schooling and equitable learning outcomes. Sports and Physical Education across all levels of school education is a major intervention proposed under the scheme. In this context, a representation was submitted to the MHRD on providing sports equipment to Government and aided schools.

Parents and children in the age group of 5 to 15 years are key stakeholders for adoption of sports in schools. A sustained campaign was conducted through the year to propagate to this target audience, the importance of sports for holistic development of children. Several sports related activities, sharing anecdotes & news and building a community of sports' supporters were driven through this campaign.

ACTION

While the global sports industry is valued at US\$ 500-600 billion, in India it is yet to play the role of a strong contributor to the economy.



From L to R: Chandrajit Banerjee, Director General, CII; Col Rajyavardhan Singh Rathore, Minister of State (I/C) for Youth Affairs & Sports and Minister of Information & Broadcasting and Jalaj Dani, Co-Chairman, CII National Committee on Sports in New Delhi



Sanjay Gupta, Chairman, CII National Committee on Sports at the CII Scorecard 2018 in New Delhi

Discussions on enablers and impediments to the business of sports were thus facilitated by Industry leaders, actors and leading sports personalities at the Annual Session 2018. Investment opportunities in grassroots sports and benefits of accelerating growth of sports services were deliberated upon at the Global Exhibition on Services (GES).

The importance of sports education in schools, building a sports culture, understanding international best practices on sports development and utilizing CSR funds towards sports were reiterated at the 4th edition of SCORECARD by Col Rajyavardhan Singh Rathore, Minister of State (I/C) for Youth Affairs and Sports and Minister of Information & Broadcasting.

To urge corporates to invest their CSR funds in sports, a collaborative philanthropic effort was launched. The Making India Play Fund was created with the objective of promoting sports education in schools, development of local sports infrastructure and capacity building of sports & physical education teachers.

Propagating the importance of holistic education, a pilot project on building capacity of physical education teachers of the Kendriya Vidyalaya Sangathan (KVS) was organised under the aegis of MHRD. A select team of 34 Physical Education Teachers participated in this 3-day workshop. Based on the success, similar workshops are being planned in other schools as well.

CII supported the 2018 Sports Analytics World Series, a global conference series held in Mumbai, as Industry



Vijender Singh, Olympic Bronze Medallist, Boxing at CII Annual Session 2018 in New Delhi

partner. Cutting-edge ideas and innovations in sports analytics and sports technologies were some of the highlights at the international event.

Distinguished sportswomen from the North East region, Ms MC Mary Kom, Ms Dipa Karmakar, Ms Saikhom Mirabai Chanu and Ms Hima Das were felicitated with a cash award and a memento. While recognising the arduous endeavors of these eminent sportswomen to make the country proud, CII also hoped that they would be an inspiration for inclusive & sustainable development of the NE region.

A much awaited Industry association, SPORTSCOM was launched at the CII Annual Session 2018 by Col Rajyavardhan Singh Rathore. Commerce through Sports (SPORTSCOM), is a not-for-profit apex Industry body, incorporated to promote sports goods manufacturing & service providers to the sector and make them globally competitive.



Kendriya Vidyalaya Sangathan Physical & Health Education teachers along with course instructors

YOUTH POWER

YOUNG INDIANS

Young Indians (Yi), is a CII initiative with presence across the country through its 43 Chapters, including three new chapters in Mizoram, Puducherry and Thoothukudi launched in 2018-19. Comprising more than 2700 direct Members in the age group of 21-45 years, the YUVA Wing has enrolled over 19,000 students. These dynamic individuals, from varied walks of life including entrepreneurs, professionals, academicians, artists, homemakers, are passionate about contributing to social impact initiatives and those that contribute to the surrounding ecosystem. The Yi projects and programmes, covering causes related to education, healthcare, environment, employability, youth leadership, arts and other rural initiatives, are truly reflective of this 'giving' spirit of the Members.

INITIATIVES

During the year, Yi focused on the three pillars of Nation Building, Thought Leadership and Youth Leadership. Project Masoom, Gift an Organ, Road Safety, Rural Initiatives, Entrepreneurship & Innovation, Learning, International Engagements made a positive impact on over a million people across the country.

Project Masoom has, since its launch in 2015, created awareness on issues of child safety and child sexual

abuse, amongst millions of stakeholders. The 619 outreach activities themed 'Play Your Part', impacted over 35 lakh people directly as well as by raising awareness. Launched in 2018, Leher is a novel initiative under this project comprising of 52 one-minute movies on child safety and protection, being made with participation of renowned scriptwriters and filmmakers. Skate for a Cause campaign saw a Yi member skate 6000 kms across the Golden Quadrilateral over 90 days raising awareness about child safety and girl child education to over a million people. Going forward, the project plans to build consensus to include child safety as part of the curriculum in primary schools in India.

The Gift an Organ project, that has increased organ donation awareness since 2016, achieved a landmark recognition from National Organ and Tissue Transplant Organisation (NOTTO), of the Ministry of Health and Family Welfare. With a national registration, GAO collated 3300 online pledges and expects to list future pledges on the official National Registry of Organ Donors.

The Road Safety project continued campaigns on educating citizens on the importance of abiding by traffic rules and imbibing a sense of responsibility towards fellow citizens to avoid accidents & deaths.



5th Yi Yuva Leadership Camp in Jaipur



Tina Ambani, Chairperson, Group CSR, Reliance Group pledging support to the Yi Gift an Organ project in Pune

In partnership with iCreate, an initiative of the Gujarat Foundation for Entrepreneurial Excellence (GFEE), efforts were made to promote entrepreneurship and innovation, by providing stakeholders exposure to the start-up ecosystem and creating learning opportunities. A MoU was signed with Laboratory for Advanced Research in Polymeric Materials (LARPM), CIPET with an aim to create a state of the art lab-of-labs, to enable product innovation using mixed media. The CIPET Yi Innovex Lab also supports co-sharing of incubation space by aspiring entrepreneurs, innovators & start-ups from other promising fields. The Entrepreneurship Week-Future Now, was launched to connect entrepreneurs with Industry experts to help budding entrepreneurs explore opportunities in different countries as well as collaborations. Future Now successfully brought together the Government of Karnataka, Embassy of France, Swissnex, Trade & Investment Queensland and Japan External Trade Organization (JETRO) with over two thousand entrepreneurs, VCs, angel investors and students. The engagement culminated in 'Entrepreneurship Santhe', a carnival that celebrated the Spirit of Entrepreneurship.

Yi's learning vertical facilitated webinars on topics such as youth leadership, complex cryptocurrency, stock trading, health & fitness and augmented reality. The Leadership Academy organised the Annual LA for Chapter Co-Chairs and a two day intensive programme on the core principles and values of Yi and the role of Chapter Leadership.

Members engaged with entrepreneurs across the globe through participation in the G20 YEA Summit in Buenos Aires and interacted with French and Italian delegations. The Commonwealth Forum in London and the Commonwealth Business Forum were other such opportunities for the Yi members.

At the specially curated Annual Retreat at Jaipur along with Jaipur by Nite, members celebrated India's culture.

The 11th edition of the Coimbatore Vizha connected 103 organisation through 123 events impacting close to 5 lakh people directly and inspired more than 25,000 youth of Coimbatore.

TAKEPRIDE 2019, themed 'Unbox, Unlearn, Unleash', provided fresh perspectives on the unlearning theory and putting into practice learnings and experiences from real life scenarios.

Across India, Yi chapters were deeply involved in relief work during the Kerala Floods. The Yi spirit shone through in the participation in the Task Forces and on-ground teams monitoring relief work at various CII-Yi camps.

BHARATIYA YUVA SHAKTI TRUST

With over 10 to 12 million youth joining the workforce every year, India's job creation challenge is enormous; multiplied manifold by another 7 million youth annually wanting to shift from agricultural to other forms of occupation. The Government's continuous efforts to generate jobs need to be supported by a vigorous entrepreneurship development effort.

Bharatiya Yuva Shakti Trust (BYST), a not-for-profit organisation established in 1992, assists disadvantaged Indian youth in developing business ideas into viable enterprises. BYST provides to young entrepreneurs, financial assistance through partner Banks as well as mentoring support. Since its inception, the Trust has received unstinting support from CII.

ADVOCACY

Reaching out to the disadvantaged youth across the country, BYST has played a pioneering role in entrepreneurship development. While addressing the entrepreneurial aspirations of the underprivileged youth, BYST also helps create additional jobs. BYST has, over the years, created awareness and counselled 624,856 youth and set up 7570 ventures with 95% success. Supported by 5832 mentors, the entrepreneurs have created 263,201 jobs. BYST has an international footprint in 45 countries through networks and its entrepreneurs have won 86 national and international

awards. Over the years BYST has driven collaboration and built linkages with local grassroots communities in Delhi NCR, Tamil Nadu, Telangana, Maharashtra (supported by Bajaj Auto), Odisha (supported by Tata Steel Ltd in Kalinganagar and JK Paper in Rayagada) and Assam. In 2018, BYST entered into a partnership with Info Edge (India) Ltd for operations in rural Gurugram and to promote entrepreneurship in Delhi NCR.

ACTION

Having dedicated over 27 years of service to the nation, BYST continued to build its footprint in entrepreneurship development. The Mentor Movement was given a further push, with a focused approach to transforming India's youth. The International Mentoring Summit continued to provide a platform for encouraging employability initiatives and inspiring India's youth to turn entrepreneurs. At the Summit Thiru Banwarilal Purohit, Tamil Nadu's Governor, emphasised the importance of mentoring young Grampreneurs™ for inclusive growth.

Three winners of the Business Idea Contest (BIC) were facilitated at the Summit. About 10,000 youth from Tamil Nadu & Pondicherry shared their business ideas that could be converted into successful micro-enterprises. Of these about 1500 were submitted by youth from 100 villages and over 40 academic institutions.

Mentoring India™, a flagship BYST initiative, trains officials through the Mentor Online Learning (MOL) programme to become touch points for youth aspiring to turn entrepreneurs. The other capacity building programmes conducted during the year included Rural Self Employment Training Institutes (RSETI) for officials of State Bank of India and Indian Bank. The participants, certified from City and Guilds, UK, as 'Accredited Mentors' were supported for a year through learning labs and networking activities.

The effort to assist disadvantaged Indian youth in developing business ideas into viable enterprises continued with a slew of training programmes. The Smart Training for Enterprise Planning (STEP) handheld the youth in converting their ideas into structured business propositions, and provided them valuable knowledge to set up their businesses. Taking this programme to the next level, BYST also launched the Entrepreneur Online Learning, STEP's online version. A JP Morgan funded multimedia platform, this version will help

expand the reach to the 'bottom of the pyramid' and bring uniformity in the pedagogy of the existing training programmes under STEP.

An ecosystem of continuous learning and support was provided through short nuggets that strengthened the training and hand holding process, thus ensuring a higher scale and scope of expected outcome.

AWARDS AND ACCOLADES

Over the last 27 years, BYST led by Founding and Managing Trustee, Ms Lakshmi V Venkatesan, has helped nurture the entrepreneurial dreams of India's underprivileged youth. In recognition of her efforts, she was conferred the Pride of Delhi Award for Women Leadership, in December 2018. This is an independent brand recognition for extraordinary success from innovative and effective practices in the country.

BYST entrepreneur, Siddharth Salunke, received the National Entrepreneurship Award 2018 (Ministry of Skill Development and Entrepreneurship Award) in the chemicals, pharma, and bio category. He has expanded his business from product manufacturing to offering research, training and technical services to the scientific fraternity. His DSRI approved, in-house research facility, is the backbone of developing innovative concepts into commercial products.

BYST supported entrepreneur Dr Neelima won the Junior Chamber International Business Excellence Award for 2018 for her business Cocotang. This is the world's first exclusive brand for dairy free and preservatives free tender coconut milkshakes and mocktails. Already featured in the Telugu Book of Records, the brand is expected to be published in Emerald Publishing, an international business journal.



Vivek awarded the first prize for his business idea of low cost mosquito gloves at the International Mentoring Summit at Anna University, Chennai in the presence of Thiru Banwarilal Purohit, Governor, Tamil Nadu

INDIAN WOMEN NETWORK

CII National Committee on Women Empowerment and the Indian Women Network (IWN) contribute to women empowerment through advocacy and initiatives that promote women's participation in the economy and development at large and across sectors. IWN, the exclusive network for women professionals, works towards enabling women to become better professionals by offering various need based services, new information and avenues of growth and networking opportunities. IWN, currently operational in 15 States, 1 Union Territory and 7 Zones, launched its services in Jharkhand, Erode & Indore in 2018.

ADVOCACY

While enabling women to become achievers in their respective fields, IWN promotes the concept of equal opportunity at workplace. The CII IWN Equal Opportunity initiative helps Indian companies design and adopt holistic women's empowerment strategies to promote inclusion of women at workplace. A Pilot programme under this initiative, conducted in Kerala along with BSR, was concluded in January 2019. Initial results have been encouraging with companies adopting small changes to make the workplace more conducive for women.

Going forward, workshops will be launched to introduce the Gender Self Diagnostic Tool that enables companies to self-assess progress towards gender equality by identifying strengths, gaps and opportunities in their



Launch of CII IWN Jharkhand in Jamshedpur

existing business function. The self-assessment will help companies establish benchmarks, set targets and measure progress in several areas meant to promote gender equality. Continuing the effort to empower women in the workplace, Member companies are being encouraged to sign up for the CII-IWN Equal Opportunity Pledge. The Guidelines that go beyond compliance, impact an organisation's culture and drive it to become increasingly inclusive.

CII encouraged entrepreneurs from the IWN Membership to sign up for NITI Aayog's 'Women Entrepreneurship Platform' initiative and explore opportunities to realize their entrepreneurial aspirations.

ACTION

The 5 E's i.e. enable, excel, exceed, energize and empower can be leveraged to encourage women's empowerment and gender parity in the Industry. These were extensively discussed at the 1st edition of the IWN National Conclave. 'Forging Unusual Partnerships', a handbook released at the Conclave, is expected to encourage companies to forge partnerships with grassroots women transformers.

A proposed mentoring programme to be launched in Mumbai and Chennai, will see 20 high potential women being mentored by distinguished mentors.



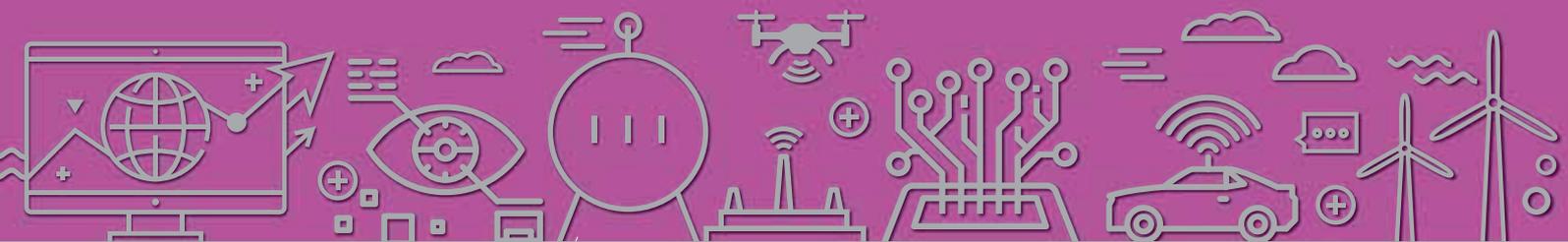
Release of IWN – The Journey brochure at the First National Conclave of the CII National Committee on Women Empowerment and IWN in Hyderabad



INTERNATIONAL BUSINESS DEVELOPMENT



- › India and the World
- › Multilateral Forums
- › CII-FBN India Chapter
- › Promoting Brand India
- › Trade Policy
- › Exports
- › Trade Fairs



CII's GLOBAL FOOTPRINT AND INTERNATIONAL INITIATIVES IN 2018-2019

09 OPERATIONAL INDIA BUSINESS FORUMS

Australia*, Caribbean, China, Egypt, Latin America and the Caribbean (LAC), Singapore, South Africa, Turkey*, United Kingdom, United States of America

07 CEOs FORUMS COORDINATED IN 2018-19

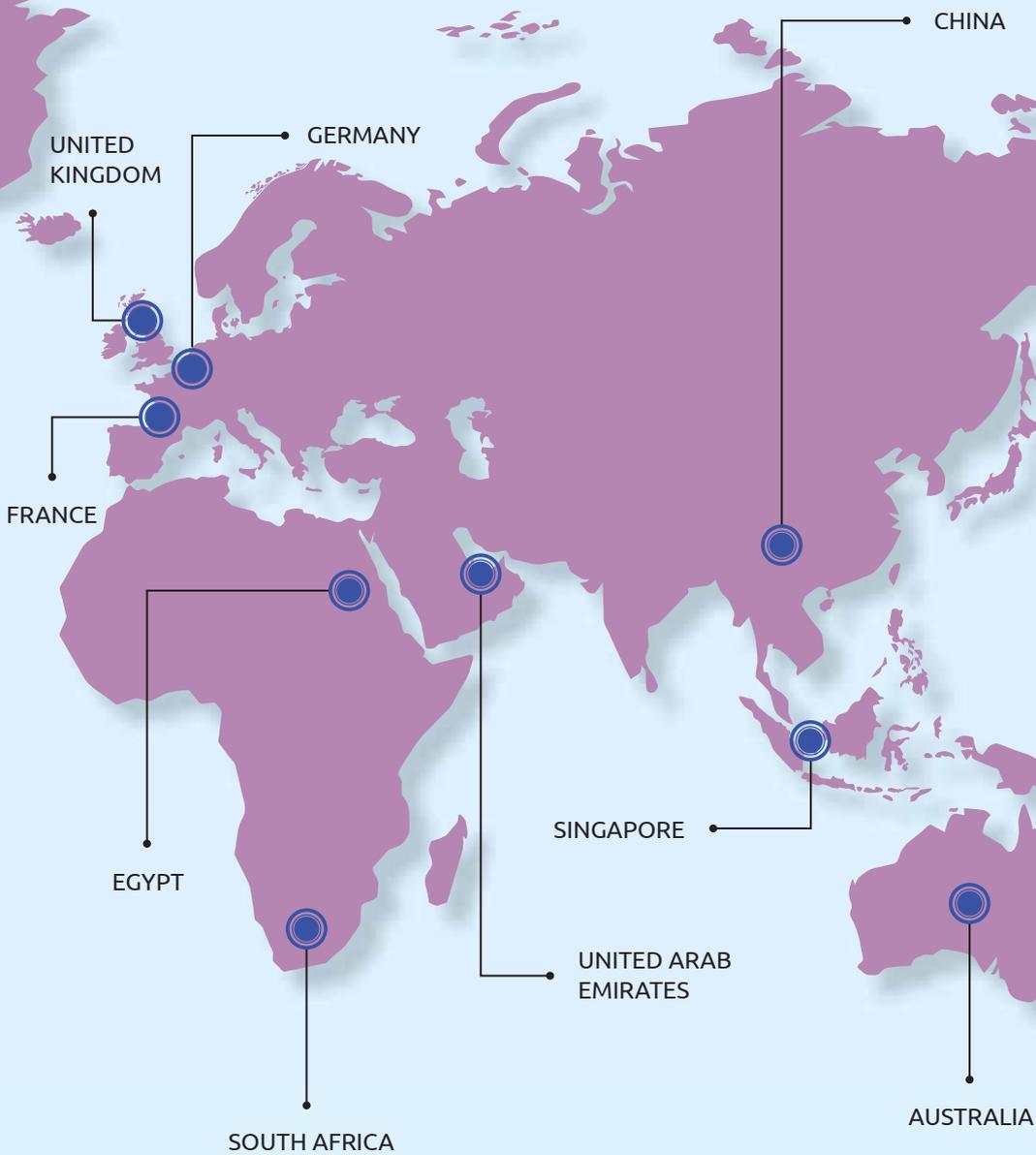
India - French CEOs Forum
India - UK CEOs Forum
India - South Africa CEOs Forum
India - Indonesia CEOs Forum
India - Japan Business Leaders Forum
India - Malaysia CEOs Forum
India - Sweden Business Leaders Roundtable

1500+ B2B MEETINGS DURING REGIONAL CONCLAVES

CII - EXIM Bank Conclave on India Africa Project Partnership
India - CLMV Business Conclave
India - Latin America & Caribbean (LAC) Conclave

* Launched in 2018-19





355 MoU PARTNERS IN 126 COUNTRIES

INDIA AND THE WORLD

Over the last few years, India's engagement with the world has become increasingly multi-dimensional, covering aspects of geo-politics, trade, economy and security. At the same time the engagements at the people to people & business to business level have also deepened. In this backdrop, CII endeavoured to connect Indian Industry with the world on a wide range of issues identified as corporate India's national priorities. Efforts to establish Indian Industry as a dependable and stable partner were also stepped up.

INDIA BUSINESS FORUM

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 organises and facilitates meetings with Government officials and agencies to address issues facing the Members. Presentations by public and private sector representatives help provide information on new rules and regulations in the country of operation.

As the voice for the Indian Industry, CII-IBF China continued to play a catalyst's role in furthering a vibrant economic relationship between India and China. The Forum not only helped Members to expand their business interests in China, but also established itself

as a bridge between the Chinese Government & other agencies and Indian companies. Several opportunities were created for learning from experiences of MNCs from other countries. Investment prospects offered by States such as Gujarat, Tamil Nadu and Madhya Pradesh were showcased to the Chinese industry. Towards this end, visits of delegations from CCPIT and the State Administration for Market Regulation (SAMR) to India in 2018 were also facilitated.

Some key issues raised by CII-IBF Egypt Members with officials from the General Authority for Investment and Free Zones included renewal of work permits for foreign employees, infrastructure at the free zones where Indian Investors were located, renewal of licenses for companies and fees levied from investors. Members of the Egypt Chapter also interacted with the Chairman, Customs Authority and the Chairman, Industrial Development Authority. Members explored trade and investment opportunities and were assisted in identifying reputable partners in Egypt.

Issues relating to regulation, trade facilitation, tariff & non-tariff barriers and other challenges facing Indian businesses in the Latin American and Caribbean (LAC) region were identified by CII-IBF for the LAC region



State Administration for Market Regulation (SAMR) delegation led by Gan Lin, Vice Minister of SAMR during the visit to CII Institute of Quality in Bengaluru



CII IBF meeting with the Chairman of Industrial Development Authority Ahmed Mostafa Ewis and Dr Vinod Bahade, Charge d' Affaires of the Embassy of India in Cairo

under the Chairmanship of Mr Jaidev Shroff, Global CEO, United Phosphorus Ltd (UPL). A consultative process with the Indian Diplomatic Missions and the LAC Governments was followed for this purpose. Interactive sessions on topics such as arbitration, M&A, labour policy, taxation laws and other relevant areas, such as ease of doing business, helped Indian companies understand the business landscape in the region.

In Colombia, opportunities were created to network with key stakeholders in collaboration with the National Business Association of Colombia, Bogota Chamber of Commerce, the Colombian Government's trade and investment promotion arm-ProColombia, the Association of Free Trade Zones in the Americas and the Colombia-India Chamber of Commerce. Interactions with the Government of the State of Durango (Mexico), the Government of the Province of Caldas (Colombia), the Government of the Province of Almirante Brown (Argentina), as well as sessions on Cuba and the lesser explored Caribbean Islands opened new opportunities for Indian businesses. The Forum met Gen (Dr) V K Singh, Minister of State for External Affairs, Government of India, and other key stakeholders in Chile, including the Federation of Chilean Industry, Santiago Chamber of Commerce and the Chile-India Chamber of Commerce.

Some key agreements under consideration by India and UK include finalisation of the India-UK Totalisation Agreement, negotiation of a Bilateral Investment Treaty as well as a Post Brexit FTA between India and UK. During the year, CII-IBF UK, led by Dr David Landsman, Executive Director, Tata Limited, took forward these and other pertinent issues such as migration & labour

mobility, enhanced regional footprint of Indian companies, developing a roadmap/framework to ensure that businesses have full transparency on the EU's General Data Protection Regulation, domiciliation of companies in the UK, lower fees for business and visitor visas, among others.

The annual edition of India Meets Britain Tracker, that maps the fastest growing Indian companies in the UK, released in association with Grant Thornton, revealed that around 800 Indian companies in the UK employ nearly 105,000 people. The tracker estimates their combined revenue at £46.4 bn.

In a showcase of Indian businesses, the UK Heads of Indian companies met 40 UK Parliamentarians and senior ministers in the British Parliament. The Manchester India Partnership, a forum where CII is a founding partner, was also launched at the showcase. The Partnership's study titled Northern Powerhouse and India, highlights opportunities for collaboration in digital & information technology, health innovation, energy & sustainability, advanced manufacturing and tourism. Pursued by the Partnership, a direct air route from Mumbai to Manchester was recently established, opening up a host of opportunities between North of England and India. The International Business Festival in Liverpool was an opportunity for the CII-IBF UK team to network with businesses operating in the country.

In the light of the impending Brexit, various countries with Embassies in London reached out to Indian companies through CII. The Prime Ministers of Malta & Portugal and the Ambassadors of Poland, Mauritius,

Antigua discussed opportunities offered by their countries that could be of interest to Indian businesses.

Indian Industry's investments in the US, job creation, CSR and R&D in the US were publicized by CII-IBF USA, under the leadership of Ms Sofia Mumtaz, President, Lupin Pharmaceuticals. While community and local engagements such as skill-building and emergency & disaster relief management were encouraged by the Forum, the Members were apprised of the shifts in US trade and tax practices.

A Road Trip USA was agreed upon under the branding strategy for Indian Industry in the US. The Road Trip is an ongoing programme of meetings exploring commercial opportunities across different States of USA. A series of briefings on Capitol Hill titled, US-India: The Way Forward, was launched to promote India-US relationship with US legislators and staffers.

AFRICA

Africa, also called the land of unlimited opportunities, despite attracting global investors, leaves much to be explored. The second largest continent in size, Africa is also the second most populous region in the world, with untapped natural resources and vast expanses of arable land. Bearing in mind Africa's importance to commercial and economic partnerships, CII organised several Africa focused events through the year. Interactions and business delegations were encouraged to help expand India's footprint in the continent.

Sentiments of Afro-optimism and enthusiasm about the India growth story marked the 13th edition of CII-EXIM Bank Conclave on India-Africa Project Partnership in New Delhi. Both sides articulated their resolve to pitch



Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation, Government of India and Dr Rob Davies, Minister for Trade & Industry, Government of South Africa with the Members of India South Africa CEOs Forum in Johannesburg, South Africa

the burgeoning India-Africa partnership to a higher trajectory. Attended by over 500 delegates from 43 African countries, including 35 ministers from 20 African countries, Industry leaders, entrepreneurs and policy-makers, the Conclave also saw participation of 300 Indian delegates. The presence of Vice-Presidents of Uganda, Malawi and Zimbabwe bears testimony to the ascending stature of this Conclave.

The Regional Conclave on India-West Africa Project Partnership in Abuja, Nigeria, joined by a 70-Member CII led delegation, culminated in a roadmap and a multi-pronged action plan for intensifying and deepening economic partnership between India and 15 countries of the Economic Community of West African States (ECOWAS). Organised with support from the Ministry of Commerce and Industry (MoCI) and the Ministry of External Affairs, (MoEA) Government of India; Export – Import Bank of India and ECOWAS Commission, the Conclave saw over 300 Indian and African Industry leaders and CEOs discuss close to 500 projects for possible collaboration.

Shri Narendra Modi, Prime Minister of India and H.E. Mr Yoweri Museveni, President of Republic of Uganda, addressed over 400 businessmen from India and Uganda at the India Uganda Business Forum. In Kampala, the Forum was organised in partnership with Private Sector Foundation Uganda (PSFU). President Museveni hailed the bilateral agreement to enhance cooperation in trade, investment and tourism between India and Uganda.

A 28-Member, multi-sector business delegation led by Shri Suresh Prabhu, Minister of Commerce & Industry and Civil Aviation, Government of India, participated in the India-South Africa Business Summit in Johannesburg. Organised jointly with the High Commission of India, Pretoria; Department for Promotion of Industry and Internal Trade (DPIIT), formerly DIPP MoCI; Invest India and Government of South Africa. The Summit also saw participation of 48 Members of CII-IBF South Africa, many of whom have significant investments in the country. Presence of three Cabinet Ministers from South Africa and Ministers from SADC countries, including Lesotho, Botswana, Swaziland and Mozambique, Head of Chambers of Commerce, Trade representatives, SADC Ambassadors and private businessmen made the deliberations more meaningful and objective. While several Indian companies showcased their strengths

at the exhibition, a white paper titled Indian Industry's Inclusive Footprint in South Africa: Doing Business, Doing Good was also released.

The meeting of the India-South Africa CEOs Forum, held during the Summit, aimed at identifying key sectors of potential growth in South Africa's new politico-economic landscape. The Summit was also an opportunity for Indian companies to raise their issues with Shri Suresh Prabhu in a smaller interactive session.

ASIA

East Asia

The East Asian region forms a major focus of India's Act East Policy. Over the past year, India has articulated the role of trade in promoting prosperity of the strategic Indo Pacific region.

Japan

The Make in India Road Shows in Osaka, Nagoya and Tokyo attracted Japanese companies to India. Mr Shailendra Singh, Additional Secretary, DPIIT, co-organiser of the show along with JETRO, was joined by Dr Dharmendra Singh Gangwar, Additional Secretary, Ministry of Food Processing Industries, Government of India in meeting around 80 Japanese companies.

As the secretariat for the India Japan Business Leaders' Forum (IJBLF), CII organised its 11th meeting in Tokyo, Japan. The CEOs along with the Co-Chairs, Mr Baba Kalyani, Chairman, Bharat Forge Ltd and Mr Akihiro Nakanishi, Chairman, Keidanren & Executive

Chairman, Hitachi Ltd handed over a joint statement to the Prime Ministers of India and Japan.

The 9th Asian Business Summit (ABS), organised along with Keidanren, Japan in New Delhi, laid renewed emphasis on the need for inclusive Economic Partnership Agreements (EPAs) and Free Trade Agreements (FTAs). Their implementation as a means to liberalize trade, raising competitiveness of a region and attracting FDI were also emphasised by the participating heads of leading Industry Chambers from 8 Asian economies.

South Korea

Mr Jeong Deok min, The Honorary Counsel General of India, Busan, South Korea led a business delegation to India to explore interests in sectors like shipbuilding equipment & material, seafood processing, tax & lead services, construction, automobile, logistics, tourism & IT amongst others.

China

At a Talk on Shift in Power Balance, Mr Kevin Rudd, Former Prime Minister of Australia and President, Asia Society Policy Institute, Ambassador Shyam Saran, Former Foreign Secretary of India and Senior Fellow, Centre for Policy Research and Mr Ravi Bhoothalingam, Member, CII Core Group on China and Founder, Manas Advisory focused on India, US and China.

Mr Zhu Mingchun, Vice Chairperson of the Budgetary Affairs Commission (BAC) of National People's Congress, PR China met with some select senior Rajya Sabha Members of Parliament in New Delhi.



Indian CEOs with Narendra Modi, Prime Minister of India and Shinzo Abe, Prime Minister of Japan at the India Japan Business Leaders Forum in Tokyo, Japan

South East Asia

ASEAN

India's strengthened and multi-faceted relationship with the ASEAN region has evolved over the last three decades, prompted by significant changes in the world's political and economic scenario and India's own march towards economic liberalisation. The upgradation of the relationship into a Strategic Partnership in 2012 was a natural progression to the ground covered since India became a Sectoral Partner of the ASEAN in 1992, Dialogue Partner in 1996 and a Summit Level Partner in 2002. A total of 30 Dialogue Mechanisms between India and ASEAN, cutting across various sectors, provided direction to the relationship. Today, the country's Look-East Policy has matured into a dynamic and action oriented Act-East Policy, a key pillar of India's foreign policy.

Cambodia

After holding the first four editions of the India-CLMV Business Conclave in India, the MoCI, Government of India took the lead in taking the Conclave to Phnom Penh, Cambodia. Aligned to a shift towards the Act East Policy, the Ministry of Commerce, Kingdom of Cambodia joined hands with CII for this edition. Addresses by Ministers from both countries, and release of the Report on Enhancing LDCs Market Access into India-Case Studies of Cambodia, Lao PDR and Myanmar and an Exim Bank Report on Enhancing India's Engagement in Healthcare Sector with CLMV Countries marked the occasion. The report, commissioned by the Ministry of Foreign Affairs, Kingdom of Denmark, examines India's trade trend with Cambodia, Lao PDR and Myanmar and makes recommendations on enhancing the trade relations. The India-Cambodia Business Forum and visit of a business delegation to Myanmar provided the foundation for a successful Conclave.

Indonesia

The need to promote linkages between India and Indonesia, within the services sector including IT & ITES, tourism, healthcare, financial services such as insurance services, and other business & professional services can not be undermined. This was highlighted by Mr Adi Godrej and Mr Rosan Roeslani, Co-Chairs of the India – Indonesia CEO Forum. The recommendations from the 2nd meeting of the Forum were submitted to Mr Joko Widodo, President of Indonesia, and

Shri Narendra Modi, Prime Minister of India in Jakarta, Indonesia. CII and Indonesian Chamber of Commerce and Industry signed a MoU to work together to enhance economic engagement between the two countries and address impediments to trade and investment. As an outcome of the meeting, CII will set up an office in Jakarta to provide market facilitation services to Indian companies keen to do business in Indonesia.

Myanmar

The CEO's Roundtable during the Myanmar India Business Conclave, held in association with the MoCI, Government of India and the Embassy of India in Yangon, hosted a ministerial delegation from the two countries.

Encouraging bilateral trade and investments in the Rakhine State of Myanmar was the focus of the India Myanmar Business Forum, organised jointly with Ministry of Foreign Affairs. Myanmar and Union of Myanmar Federation of Chambers of Commerce & Industry (UMFCCI). The Forum also promoted the Myanmar Investment Summit 2019.

Singapore

During the 25 year engagement out of Singapore's 53 years history, CII has played an early and important role in helping Singapore businesses understand the Indian landscape and acted as a bridge in facilitating investments and partnerships between the two countries. In celebration of completion of 25 years of engagement, Mr Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises apprised key political and business leaders in Singapore of India's economic reform agenda and the ensuing business opportunities. Views on the global and regional economic outlook and areas of future partnership between India and Singapore were also discussed during these meetings.



CII Singapore Core Group with Lee Hsien Loong, Prime Minister of Singapore in Singapore

The Inaugural CII Lecture in Singapore, launched to enhance bilateral and economic relations between the two countries, was delivered by Mr Heng Swee Keat, Minister for Finance, Republic of Singapore. On this occasion, several political & business leaders were felicitated for their contribution to building the India Singapore economic relations over the years. These included Mr Goh Chok Tong, Emeritus Senior Minister, Republic of Singapore and Mr Heng Swee Keat. Singapore's institutions and business chambers that helped drive the economic agenda between the two nations were also acknowledged. During a closed-door session on India Singapore relations organised along with iSAS, deliberations focused on possible strategic partnership for enhancing and elevating the present relationship between both countries. The Core Group also interacted with research scholars and thought leaders in the fields of economy, geo politics and diaspora involvement.

The engagement with Singapore Business Federation (SBF), for close to two decades, has involved various programmes & projects that enhance the economic partnership between India and Singapore. Plans are afoot to jointly promote 'Make in India' in the ASEAN, especially in Singapore and to deepen the relationship at the State level through the AP-Singapore Business Council. Going forward, linkages amongst SMEs from both countries will be strengthened through a follow up mechanism, in partnership with the Singapore Indian Chamber of Commerce and Industry.

Vietnam

An Indian delegation visited Hanoi, Vietnam in honour of the visit of Shri Ram Nath Kovind, President of India.



CII CEOs Roundtable with Sheikh Abdullah Bin Zayed Al Nahyan, Minister of Foreign Affairs & International Cooperation, UAE and Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd in Mumbai

Organised in association with the MoEA, Government of India, The Indian Embassy in Vietnam, Government of India, CII's MoU partner Vietnam Chamber of Commerce and Industry (VCCI) and other chambers, the delegation participated in the Vietnam India Business Forum.

MIDDLE EAST, WEST ASIA AND NORTH AFRICA (MEWANA)

Middle East

His Highness Sheikh Abdulla Bin Zayed Al Nahyan, UAE Minister of Foreign Affairs and International Cooperation, emphasised UAE's continued endeavours to explore more opportunities to enhance economic & commercial relations between India and UAE, while speaking at a Roundtable organised in Mumbai. Mr Uday Kotak, President-Designate, CII and Managing Director & CEO, Kotak Mahindra Bank Ltd appreciated the UAE Government's decision of granting 10-year long-term visas to companies interested in investing in UAE and suggested the need for exploring participation of private sector in the UAE-India Infrastructure Investment Fund (NIIF).



The Indian Delegation with President of India, Ram Nath Kovind at the India-Vietnam Business Forum



CII recently opened an office in Dubai, in the Dubai Chamber of Commerce & Industry's (DCCI) premises, with a view to enhance bilateral trade & economic engagement in the region. A business delegation, during the Dubai Investment Week, engaged in a direct dialogue series, B2B meetings & roadshows with UAE based Government entities such as the KIZAD (Abu Dhabi Ports) and ZonesCorp. A separate UAE Country Session was held during the Partnership Summit, for which UAE was the partner country. Sultan Bin Saeed Al Mansoori, Minister of Economy, UAE led a delegation to the Summit.

West Asia

West Asia in a resurgence from the war, is seeing vast potentials. Business delegations to Syria, Iraq and Lebanon helped Indian Industry explore business opportunities, while forging economic engagements in the region. With a view to understanding the Government policies towards rebuilding collaborations, the delegation met various ministers of industry, trade, health, finance, agriculture, electricity, communication, oil & petroleum, as well as the Central Banks, Syria Investment Agency and Iraqi Board of Investment. In Iraq, the delegation met Mr Nechirwan Barzani, Prime Minister, Kurdistan Regional Government.

North Africa

North Africa is a socially vibrant region with proximity to the European Union, West & the Middle East making it economically promising. In this context, a business delegation to Algeria and Tunisia focused on promoting and facilitating economic cooperation. MoUs were signed with the Algerian Chamber of Commerce & Industry and CONECT International, Tunisia to encourage commercial co-operation and give new impetus to the bilateral relations. With exposure to the tremendous possibilities, some Members initiated discussions for setting up units in these countries.

SOUTH ASIA

South Asia as a region has immense potential to be the frontrunner of growth and prosperity in the 21st century. Home to about a quarter of the global middle-class consumers and the largest working age population, the region has positioned itself as a good consumer market, the right combination of resources to boost agriculture, industry, and manufacturing and thus to attract foreign

investments. Yet South Asia remains one of the least economically integrated regions in the world. Over the past year, therefore several sessions focusing on India's engagement with the region were conducted. While the session on India's Strategic & Economic Agenda for South Asian region discussed Industry issues and opportunities, synergies in services in South Asia were highlighted at a Roundtable held at the GES 2018 in Mumbai.

Apart from an interaction with the Indian Heads of Missions of South Asia and Central Asia, a session on enhancing economic cooperation in the region was addressed by Ministers and office bearers of the Chambers of Commerce from Maldives, Afghanistan and Nepal.

A business delegation, coinciding with the Sri Lanka Investment and Business Conclave, the flagship event of the Ceylon Chamber of Commerce in Colombo, explored business opportunities in agriculture, infrastructure, SEZ development, automobiles, smart cities and urban infrastructure. Other areas of focus included tourism, textile, banking, ICT & telecom, power, shipping & maritime, pharmaceuticals, education, knowledge services and skill development.

At the 1st Meeting of the CII Task Force on Sub-Regional Integration, Ambassador Amar Sinha, Former Secretary-ER, MoEA, Government of India addressed issues raised by representatives of Indian industry. At an interactive session of select CEOs, H.E. Mr Ibrahim Mohamed Solih, President of the Republic of Maldives, welcomed Indian investment to the island nation and highlighted his Government's efforts to improve the ease of doing business in his country. Indian businesses also had an opportunity to meet with the Foreign Minister of Maldives and the accompanying high level delegation at a separate session.

CENTRAL ASIA

Uzbekistan

The India-Uzbekistan Business Forum, an exclusive business interaction with Ministers and dignitaries, was a platform to discuss the emerging business/ investment opportunities for Indian companies and to share best practices for enhancing economic engagement. The Forum, organised in partnership with the Embassy of Uzbekistan, coincided with the visit of H.E. Mr Shavkat Mirziyoev, President of Uzbekistan



From L to R: Chandrajit Banerjee, Director General, CII; Adkham Ikramov, Chairman of the Chamber of Commerce and Industry of Uzbekistan; Suresh Prabhu; S Kholmuradov, Deputy Prime Minister of the Republic of Uzbekistan and Shiv Khemka, Chairman, CII Central Asia Committee and Vice Chairman, Sun Group

to India. While select CEOs met the President at an exclusive dinner meeting, Mr Saparbek Tuyakbayev, Chairman, Kazakh Invest and Mr Bulat Sarsenbayev, Ambassador of Kazakhstan to India also joined the Forum. Following an Agreement of Cooperation signed with Uzbekistan's Chamber of Commerce and Industry, the India-Uzbekistan Business Council held its first meeting in Ahmedabad.

The meeting in New Delhi, with Mr Suhrob R Kholmuradov, the Deputy Prime Minister of Uzbekistan, signified CII's focus on the country and was followed by a CEOs delegation to Tashkent. The delegation, coinciding with the meeting of India-Uzbekistan Inter Government Commission (IGC), was addressed by Shri Suresh Prabhu.

Iran

Dr Mohammad Javad Zarif, Foreign Minister of the Islamic Republic of Iran, accompanied a high-powered business delegation to the India-Iran Business Forum, held in partnership with the Embassy of Iran in New Delhi. Gen (Dr) V K Singh (Retd), Minister of State for External Affairs, Government of India provided insights into the emerging business and investment opportunities for Indian companies in Iran.

AUSTRALIA AND NEW ZEALAND

A high level CEOs delegation, led by President, CII, Mr Rakesh Bharti Mittal participated in the India Business Summit, held coinciding with the Australia visit of Shri Ram Nath Kovind, President of India. Organised by the Australia Financial Review, the sessions focused on India's reform agenda, strategic economic partnerships and partnering for investment. The delegation also met

Mr Simon Birmingham, Minister for Trade, Tourism & Investment and Mr Jason Clare MP, Shadow Minister for Trade & Investment, Australia.

Increasing two-way investment opportunities will be possible with both the Governments of India & Australia as well as the industry supporting skill development, addressing concern areas and taking other actions to improve bilateral investments. These possibilities were emphasised at the India Australia CEOs Dialogue, where Department of Foreign Affairs and Trade, Australian Government was a partner.

The 3rd Annual Australia India Leadership Dialogue (AILD), hosted in partnership with the Australia India Institute, covered a range of fundamentally important themes including governance, geopolitics, economics & business, education and social change.

EUROPE

In a recent report released by the European Union, it was observed that India and Europe share the values of democracy, human rights, fundamental freedom and support rules-based global order centred on multilateralism. Both represent 'unions of diversity' and have important stakes in each other's prosperity and sustainable development. In this backdrop, CII engaged constructively with both, the traditional partners in Europe, as well as the emerging markets in the continent for future business opportunities.

United Kingdom

The UK-India CEO Forum met on the side lines of the bilateral visit of the Prime Minister of India to the UK. The discussions on challenges and opportunities for India and the UK to collaborate in data usage & protection,



Report Back Session with Narendra Modi, Prime Minister of India and Theresa May, Prime Minister of United Kingdom at the UK-India CEO Forum in London

technology collaboration & increasing bilateral trade & investment flows were led by senior Government officials from both sides. The meeting was followed by an interaction with the Prime Ministers of India and United Kingdom.

A 30-Member CEOs Delegation engaged with Commonwealth Heads of Government Meeting (CHOGM), marking a strategic shift for India. This visit and participation in the Commonwealth Business Forum, an integral part of CHOGM, aimed at reinforcing Indian Industry's commitment to strengthening business ties across Commonwealth nations.

Engagement with the UK was stepped up through deliberations on the evolving political and economic scenario in the UK and new opportunities for collaboration between the businesses of the two nations. The India-UK Leadership Conclave at the India-UK Week, was aimed at scaling-up the global business opportunity between the two nations. A panel discussion on regional & sectoral footprint of Indian businesses in the UK was also held during this Week.

France

The 10th Meeting of the Indo-French CEO's Forum was convened during the State visit of H.E. Mr Emmanuel Macron, President of the Republic of France to India. With presence of senior Government officials from both sides, the Forum highlighted opportunities for cooperation in sectors such as energy & environment, urban renewal-infrastructure, smart cities, waste management, communication; defence and manufacturing. A MoU was signed with MEDEF International to promote participation of French companies and share their expertise in India's Smart Cities Mission.

Smt Nirjala Sitharaman, Minister of Defence, Government of India highlighted the industrial ecosystem necessary for aerospace, defence and civil aviation and the key factors for ensuring sustainable growth in the light of the new Space Policy were the focus of the Indo-French Defence & Aerospace Cooperation Programme.

Germany

A study on the prospects from shared prosperity, stemming from the Indian Investments in Germany, was

released jointly with Ernst & Young and the Bertelsmann Foundation. The study showcases the upward movement of investments of Indian companies in Germany. These companies currently generate nearly 70% of their turnover from labour-intensive sectors of metals and automotive, with the Indian IT industry accounting for a revenue share of 9%.

Netherlands

During his State Visit to India, H.E. Mr Mark Rutte, Prime Minister of the Netherlands was accompanied by a 4-member ministerial delegation and a trade mission of 140 companies. A small group of Dutch companies led by Mr Hans de Boer, President of the Confederation of the Netherlands Industry and Employers (VNO-NCW) and the leader of the trade delegation discussed the state of the Indian economy and the ease of doing business with Mr Ramesh Abhishek, Secretary, DPIIT. The MoU with VNO-NCW was renewed on this occasion.

A delegation of select CEOs deliberated on trade and investment links between the two countries and their importance for further strengthening the bilateral relationship, in the presence of the Prime Ministers of India and Netherlands.

East Europe

Given the increasing importance of East Europe, engagements with the countries in this region were intensified. Efforts for creating & managing a unique environment for innovation, building & implementing educational programmes and providing support for commercialization of new technologies, products and services were stepped up.

Bulgaria & Czech Republic

A business delegation accompanied and interacted with Shri Ram Nath Kovind, President of India during his visit



Members of CII Business Delegation with Ram Nath Kovind, President of India, in Prague, Czech Republic

to Bulgaria and the Czech Republic. The delegation participated in B2B meetings, receptions hosted by the respective Ambassadors of India and visited the Sofia Tech Park in Bulgaria. The Presidents of India and Bulgaria addressed the Bulgaria-India Business Forum about the potential of enhancing the bilateral trade between the two nations from its current US\$ 300 million.

Another business delegation, accompanying Shri M Venkaiah Naidu, Vice President of India, received insights into the long-term strategy for economic growth as well as investment opportunities and attractiveness of doing business in Serbia, Malta and Romania.

Italy

Indian as well as Italian CEOs and some leaders from the scientific community were present at the India-Italy Tech-Leadership Roundtable, organised with the Embassy of Italy, on the sidelines of the India Italy Technology Summit.

Finland

New avenues in energy and infrastructure for smart cities were explored at a session on the subject held in partnership with Embassy of Finland. Mr Kimmo Tiilikainen, Minister for Energy, Housing and Environment of Finland presided on the session where a MoU, to facilitate partnerships for Smart City development in India, was also inked with the Finland Chamber of Commerce in India (FINCHAM). A business delegation accompanying Ms Anne-Mari Virolainen, Minister for Foreign Trade and Development, Finland explored ways of strengthening bilateral cooperation with India in smart technologies and innovation. A seminar co-hosted with Business Finland, focused on artificial intelligence, smart & digital solutions, was an excellent opportunity for exchange of views between companies from both sides.

Greece

During the President of India's visit to Greece, CII exchanged a MoU with Enterprise Greece, in the presence of an Indian business delegation. Later the two organisations partnered for the India-Greece Investment Seminar, with the objective of exploring and understanding the evolving Greek business environment and developing strategic alliances. As a run up to the 84th



From L to R: Tejpreet S Chopra, Co-Chairman, CII National Committee on Make in India-Renewables and President & CEO, Bharat Light & Power Group; Grigoris Stergioulis, Chairman & CEO, Enterprise Greece and Constantinos Angelopoulos, Director of Investment Promotion, Enterprise Greece at the India-Greece Investment Seminar in New Delhi

Thessaloniki International Fair (TIF)-Helexpo in Greece, the interactive session with Greek TIF-Helexpo in New Delhi outlined the possibilities of leveraging the expo for expanding business alliances in the region.

Spain

At the 10th 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 & 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 discuss business partnerships. A 20-Member CEOs Delegation, led by Mr Rakesh Bharti Mittal, President CII and Vice Chairman, Bharti Enterprises shared their perspectives on various subjects such as inclusive growth, India's politics, society and foreign relations, education, technology, entrepreneurship, and smart cities.

EURASIA

Belarus

Indian Industry's commitment to strengthening trade and investment with Belarus was given a fillip through the year with several activities. A visiting Indian business delegation met with about 50 Belarussian businesses at the India-Belarus Business Forum to identify prospective business partners. Interactions with officials of key ministries such as Ministry of Economy, Ministry of Anti-Monopoly and Regulation, and the Belarussian Stock Exchange, involved discussions on deepening the economic cooperation in textiles, defence, power, pharma and auto manufacturing.



From L to R: Maxim Oreskin, Minister of Economic Development, Russian Federation; Vladimir Putin, President of Russian Federation; Narendra Modi, Prime Minister of India and Suresh Prabhu at the India Russia Business Summit 2018 in New Delhi

Another business delegation, accompanying Shri C R Chaudhary, Minister of State for Commerce and Industry, Government of India, witnessed the signing of the Protocol of 9th Session of the Belarusian-Indian Inter Governmental Commission on trade, economic, scientific, technological and cultural cooperation.

Similar opportunities were explored in Ukraine too, under the India-Ukraine Business Forum where Indian businesses discussed prospective business partnerships with 40 Ukrainian businesses.

Russia

The India Russia Business Summit was a platform for leading CEOs from the two countries to discuss trade & investment issues and opportunities. At the Summit, organised in cooperation with DPIIT and Invest India, the Prime Minister of India and President of Russia reiterated their commitment to expanding business and economic cooperation between the two countries. The Summit was also addressed by several Ministers from both countries.

NORTH AMERICA

United States

A Subnational Engagement strategy to expand the India-US economic relationship beyond the capitals and Tier-1 cities was launched in 2018. This strategy intends to increase bilateral investments and job creation by facilitating exposure to new partnerships and opportunities, generate awareness about CII in new US geographies, as well as encourage engagement with organisations that focus on building State or city-level partnerships.

The story of the strategic partnership was driven through several engagement platforms, opening new opportunities along the way. Some of these included shows highlighting the investment opportunities in Andhra Pradesh, Arunachal Pradesh, Gujrat, Maharashtra and Tamil Nadu. The Select USA Summit India Reception featuring over 20 US state economic development organisations and a delegation to India led by Sylvester Turner, Mayor of Houston, Texas gave a further push to the engagement.

Building on the thought leadership with respect to building the India-US bilateral trade relationship through economic engagement, CII sought to educate stakeholders on the changing global trade dynamics. Awareness was created amongst the US Government and private sector officials on the ramifications of the Indian Industry arising from the shifting US trade regimes. Perspectives on the means to boost two-way trade in goods and services via the 'Roadmap to US\$ 500 Billion' initiative were also gathered. US Industry's concerns regarding ease of doing business were addressed to highlight opportunities and accelerate investments in India.

Thought leadership was given a further thrust with an interaction of the US Ambassador to India with Industry Members in New Delhi; submitting policy inputs to the US Trade Representative (USTR) for the maintenance of India's GSP benefits and initiating regional Roundtables in India and the US with experts to outline policy recommendations for boost bilateral trade numbers. The CEOs of the US Chamber of Commerce and the US Undersecretary of Commerce for International Trade, US Department of Commerce were hosted at Industry Roundtables in New Delhi.



Gilbert Kaplan, Under Secretary of Commerce, US Department of Commerce at an Industry Roundtable with the 2018 US CEO Mission delegates on India-US economic and trade relations in Washington, DC

The Indian Industry's priorities, goals, and intent for collaboration within the bilateral relationship in 2019 were discussed with a diverse range of stakeholders including the Embassy of India to the US, Carnegie Endowment for Peace, US Departments of Defense, Commerce, State, Energy & Agriculture, US Agency for International Development (USAID), Business Council for International Understanding (BCIU) and the US Chamber of Commerce.

Canada

With a view to advancing the India-Canada economic relationship, the focus on Canada was expanded by taking collaborations with partner organisations to unprecedented levels. The current challenges impeding the growth of Indian companies, as well as investment and job creation in Canada were highlighted while also emphasising Indian industry's contributions to the nation. New areas of growth and partnership opportunities in sectors such as agritech & food processing, media & entertainment, technology, innovation and sustainability were explored in 2018.

The India-Canada Business Forum on Innovation and Business Connectivity, co-organised with Canada India Business Forum and the Indo-Canadian Connectivity Council (February), hosted Prime Minister Trudeau in New Delhi. A Joint Industry Session with Ms Shobana Kamineni, Past President CII and the India-Canada CEOs Dialogue with DPIIT (formerly DIPP) followed the visit. The Canada India Business Forum, held in Mumbai along with Canada India Business Council, was addressed by Premier Scott Moe, Premier of the Province of Saskatchewan.

The first Indian delegation to the Toronto International Film Festival (TIFF), with the Ministry of Information & Broadcasting promoted the Indian film industry and the

India-Canada co-production treaty with agencies from the film industries of Canada, Namibia, Australia as well as with executives from the Locarno Film Festival and Festival De Cannes.

LATIN AMERICA AND THE CARIBBEAN

With a combined GDP of over US\$ 4 trillion, the Latin America and the Caribbean (LAC) region is a formidable economic force. It remains important for India from the point of view of its economic growth prospects as well as India's energy security, given that India imports about 18-20% of its oil imports from this region. CII has engaged with this region for over a decade, through a series of conclaves.

With the aim to enhance India's profile in the LAC region, the Ministry of External Affairs (MEA) and Ministry of Commerce and Industry, Government of India, and the United Nations Economic Commission for Latin America and Caribbean (UNECLAC) partnered CII for the India-Latin America and Caribbean Conclave in Chile. This was the 8th such Conclave, with the first six held in Guadalajara, Mexico. It was meant to provide a continuous platform for stakeholders to interact with a large Indian delegation and enthusiastic participants from a multitude of backgrounds. The other partners for the Conclave included Inter-American Development Bank (IDB), CAF Development Bank of Latin America, and the Federation of Chilean Industry (SOFOFA).

During the year, recommendations regarding the expansion of the India-Chile Preferential Trade Agreement (PTA) and the India-MERCOSUR PTA were shared with the Department of Commerce, Ministry of Commerce and Industry. Inputs were also given with respect to the first and second rounds of talks on the India-Peru Free Trade Agreement (FTA) and the proposed agreements with Colombia and Ecuador.

MULTILATERAL FORUMS

ASIAN INFRASTRUCTURE AND INVESTMENT BANK

Infrastructure is a primary enabler for achieving diverse social and economic growth objectives. In the Asian context, these objectives pertain to the imperatives of poverty alleviation, creation of jobs & livelihoods, and developing a livable space. The Asian Infrastructure and Investment Bank (AIIB) pursues improvement of social and economic outcomes in Asia through investment in infrastructure. In supporting the AIIB in its pursuit, CII continued to bring stakeholders together on issues of significance.

The 3rd Annual Meeting of the AIIB, held in Mumbai, aimed to capture the critical dimensions of infrastructure financing such as sources & instruments of financing; legal, institutional & governance issues; emerging sectors of infrastructure investments including futuristic, resilient & digital infrastructure as well as gender infrastructure. As a run up to this meeting, several platforms were organised to collate diverse views on creating a sustainable future while building infrastructure in the region.

Views on enhancing port and coastal infrastructure to address Asia's infrastructure gap in an environment and socially friendly manner were collated through these

engagements. Discussions on institutional approaches to building futuristic and digital infrastructure in India gave a thrust to three broad areas. These included opportunities for futuristic, resilient & digital infrastructure, resource mobilisation and emerging challenges. The conferences were organised in collaboration with Department of Economic Affairs (DEA), Ministry of Finance, Government of India and Research and Information Systems for Developing Countries (RIS).

BRICS BUSINESS FORUM

Individually and collectively, the BRICS nations occupy far greater economic space and are pitted to count amongst the world's largest economies in the near future. These economies together account for 43% of world's population, US\$17 trillion or 22% of the nominal global GDP and 17% of world trade. With each country bringing its strengths to the table, a closer alignment of their complementarities bear positive implications for their growth as well as the world at large.

The BRICS Business Forum, hosted by the Department of Trade and Industry, South Africa in Johannesburg aligned with the BRICS Summit theme, BRICS in Africa: Collaboration for Inclusive Growth and Shared Prosperity in the Fourth Industrial Revolution. The Forum deliberated on implications of the current global political economy for BRICS Member countries, the implications of the Fourth Industrial Revolution on inclusive growth and transformation, facilitating intra-BRICS trade, as well as fostering BRIC-Africa partnerships.

Key points that emerged during the discussions on promoting and facilitating Intra-BRICS investments included the need for investors to understand and adapt to policies of the countries they are operating in, such as the BBBEE Policy in South Africa. The need for sharing information and communication on potential investments amongst the BRICS Countries was



Speakers at the Session on Futuristic, Resilient and Digital Infrastructure in Bengaluru



Jitin Bhatia, President, CII-IBF(SA) at BRICS Business Forum in South Africa

emphasized. The revival of direct air links between the countries and easier visa policies for BRICS Members to ease travel were stressed.

The session held on sidelines of the BRICS Summit, in association with Gauteng Growth and Development Agency, was an opportunity for key officials from the Gauteng Provincial Government, the Department of Home Affairs to meet the Indian delegation.

ASSESSING INDIA'S CONNECTIVITY WITH ITS NEIGHBOURHOOD

South Asia is one of the most dynamic regions in the world, with a population of 1.67 billion people and economic growth of 7.1% over the last decade. Analysts believe that South Asian intra-regional trade has the potential to reach US\$100 billion over a period of 5 years if the nations involved create the enabling policy framework. Against this backdrop, efforts were made to assess and find out how India can integrate better with its immediate neighborhood.

The seminar on assessing India's connectivity with its neighbourhood, was held in collaboration with Vivekananda International Foundation (VIF) in New Delhi.

Shri Dharmendra Pradhan, Minister of Petroleum & Natural Gas and Skill Development & Entrepreneurship, Government of India, highlighted the importance of Bay of Bengal Initiative for Multi Sectoral Technical Economic Cooperation (BIMSTEC) for the region. The participants also deliberated upon the means of transportation and energy security that define the strength and sovereignty of the region comprising of Bangladesh, India, Myanmar, Sri Lanka, Thailand, Bhutan, Nepal. They also discussed the importance of their economic growth to the region's growth and development.

IORA CONFERENCE ON RENEWABLE ENERGY

The Indian Ocean Rim Association (IORA) is an association of countries whose shores are washed by the Indian Ocean. Its Members collectively aim at enhancing economic cooperation for sustained development and balanced economic growth. The IORA has four ministerial level engagements on trade, blue economy, renewable energy and tourism. Ever since its formation, India has played a key role in identifying priority areas for IORA and in deliberating the future course of action.

The IORA countries together account for 15% of the global energy demand, but command only 8.13% of the world's solar energy installed capacity. In this context, the 2nd IORA Renewable Energy Experts and Ministerial Meetings were organised for IORA in collaboration with the Ministry of New and Renewable Energy and the Ministry of External Affairs of the Government of India in Delhi. These meetings focused attention on the energy needs of IORA Member States, the collective initiatives required to promote development, use of renewable energy in the region and the need for sharing knowledge in this area.

Shri Narendra Modi, Prime Minister of India while addressing the delegates highlighted the importance of creating the alternative of clean energy for a green future. Mr Antonio Guterres, Secretary General of the United Nations said that climate change was an existential threat for all and the global renewable energy revolution would hopefully provide a replacement for fossil fuels. The key takeaways and concrete recommendations from the meetings were documented to provide direction for the efforts of the IORA Member States in the renewable energy sector.

CII-FBN INDIA CHAPTER



A large percentage of Indian businesses are family owned and controlled, a norm rather than an exception across the globe. In a dynamic and disruptive global business environment, family businesses need to strengthen their capacities to take the next leap of growth. CII-Family Business Network (CII-FBN) India Chapter provides opportunities for family owned businesses to share their knowledge and works to establish linkages with FBN chapters across the globe. A key area of work for the India chapter is promoting leadership development programmes for the next gen family members.

ACTION

Learning Best Practices

Leaders of family businesses need a shared vision, a collective purpose, a spirit of collaboration and cooperation for keeping the family together and preserving continuity of business. To provide a platform to deliver on this need of family businesses, a 28 member delegation visited the facilities of four prominent German Family Businesses: Henkel Ag & Co, Tengelmann, Krohne Messtechnik and Franz Haniel & Cie GmbH. The interactions and meetings were an opportunity to learn about the best practices adopted by these companies.

Next Gen Leadership Development and Knowledge Sharing

The 5th CII-FBN India Chapter annual summit was a powerful platform for the next generation family business leaders to share some of the most pressing issues concerning their role in business. Based on the theme 'Fold in the Future', the summit explored areas such as family gravity and waste to wealth.

The XX International Convention on Family Business

The XX International Convention on Family Business was an opportunity to learn from the real-life examples of successes and failures. Industry experts as well as actual family business owners shared their perspectives on issues facing family businesses in their daily management,

especially with respect to family governance and how to engage in cross generational dialogue.

Prof Paulo Morosetti, Paolo, SDA Senior Lecturer of Strategic and Entrepreneurial Management Department at the SDA Bocconi School of Management who comes with extensive consulting and executive experience, both in Italy and other countries, was the key speaker at the event. He serves as board member on several multi-business and multi-national firms and is a speaker on topics such as family business, succession planning and strategic change. Paolo regularly cooperates with the Family Business Network International (FBN-I) and is a member of the Family Firm Institute (FFI).

Creating and Increasing Awareness

- A real life case study on how a family that was on the edge of split, resolved their financial and personal issues was shared at the WAPI Exchange programme
- In Pune, a discussion was held on Family Gravity, led by Mr Sonny Iqbal, Global Co-leader of the Family Business Practice and Mr Neeraj Sagar, India leader of the Family Business Practice
- A workshop with Prof Andrew Keyt, an international expert on succession planning was organised by a CII-FBN India chapter in Mumbai
- A meet and greet dinner, organised by the CII FBN India Chapter in Kolkatta, provided an opportunity for Members to interact with and learn from some of the best in this space.



Delegation to Germany for Family Business Exchange Programme. From L to R: Ajay S Shriram, Past President, CII and Chairman, CII FBN India Chapter and Chairman & Senior MD, DCM Shriram Ltd; Dr Naushad Forbes, Past President CII, Co-Chairman, Forbes Marshall Pvt Ltd; Sophia von Rundstedt, CEO and Owner, v. Rundstedt & Partner GmbH and Prof Dr Peter May, Leading Family Business Expert, Germany

PROMOTING BRAND INDIA

THE PARTNERSHIP SUMMIT 2019

India is working towards a Manufacturing GDP of US\$ 1 trillion in a bid to enhancing the country's GDP to US\$ 5 trillion by 2025 and to US\$10 trillion by 2030. At a time when global economy is slowing down India continues to remain a growth spot, the stakeholders have to cooperate towards contributing to the global economic growth, for which partnerships and mutually rewarding relationships are a must.

For India to achieve its ambitious growth targets and quickening the pace of development, simplifying rules, removing discretionary powers and decentralization are going to be key. In addition, encouraging farmers to diversify into allied activities to ensure sustainable livelihoods and making agriculture profitable and sustainable need to become the focus of policy makers, Industry and the other key stakeholders. The importance of simple innovations and use of science & technology to address everyday problems of the common man will help in the betterment of human conditions. These development imperatives have thus been the focus of

the Government of India's policy initiatives such as Make in India, Skill India, Digital India, Smart Cities.

The National Industrial Policy aimed at developing global value chains, and boosting India's manufacturing competitiveness, that is awaiting Cabinet approval, will go a long way in creating a growth environment. Given the importance of global value chains to the growth of manufacturing, this policy focuses on how mutually beneficial value chains as well as supply chains can be developed.

These and several other development initiatives of the Government of India were hailed by global and Indian Industry leaders hailed the during deliberations at the 25th Partnership Summit held on January 12-14, 2019 in Mumbai. Organised in association with DPIIT (formerly DIPP) and Government of Maharashtra, the Summit was themed 'New India: Rising to Global Occasions'. The deliberations emphasised the importance of policy and regulatory certainty. Shri M Venkaiah Naidu, Vice President of India and the Chief Guest delivered the inaugural address. Shri C Vidyasagar Rao, Governor of



From L to R: Vikram Kirloskar, Vice President, CII and Chairman and MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor; Mahadev Jagannath Jankar, Minister of Animal Husbandry, Dairy Development, and Fisheries Development, Government of Maharashtra; Sultan Bin Saeed Al Mansoori, Minister of Economy, Government of UAE; Subhash Desai, Minister of Industries & Mining, Government of Maharashtra; C Vidyasagar Rao, Governor of Maharashtra; M Venkaiah Naidu, Vice President of India; Suresh Prabhu, Minister of Commerce & Industry and Civil Aviation, Government of India; Kim Hyun Chong, Minister of Trade, South Korea; Francis Gurry, Director General, World Intellectual Property Organization (WIPO); Ramesh Abhishek, Secretary, DPIIT (formerly DIPP), Ministry of Commerce and Industry, Government of India and Chandrajit Banerjee, Director General, CII at the 25th Partnership Summit 2019 in Mumbai



From L to R: Soumitra Dutta, Professor of Management at the SC Johnson College of Business, Cornell University, NY and Chair of the Board of Directors of the Global Business School Network; Chandrajit Banerjee, Rakesh Bharti Mittal, President CII and Vice Chairman, Bharti Enterprises; Murat Sonmez, MD, Head of Centre-4th Industrial Revolution & Global Network, WEF; N Venkatram, CEO, Deloitte India and Punit Renjen, CEO, Deloitte Global at the Roundtable on Shaping India's Future with Industry 4.0 in Davos

Maharashtra; Shri Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation, Government of India; Shri Devendra Fadnavis, Chief Minister of Maharashtra and Shri Subhash Desai, Minister of Industries & Mining, Government of Maharashtra, were the Guests of Honour at the meet. Attended by over 1000 delegates, the attendees at CII's flagship international Summit also included dignitaries from 40 countries and senior Government officials.

Apart from senior ministers from India, the event hosted Ministers from the Afghanistan, Angola, Cambodia, Maldives, Nepal, South Korea, UAE, Ukraine, and dignitaries from World Intellectual Property Organization (WIPO), United Nations Industrial Development Organization (UNIDO) and Organisation of Economic Co-operation and Development (OECD).

The international dignitaries shared their thoughts on India's strengths and a vibrant economy that differentiate it from other countries. India's role as a key global economic player, progressive policies & structural reforms, technological prowess, were lauded by the visiting ministers.

CII PRESENCE IN DAVOS

The World Economic Forum's annual meeting for 2019, held in Davos was themed 'Globalization 4.0: Shaping a Global Architecture in the Age of the Fourth Industrial Revolution'.

Held between January 22 to 25, 2019, this meeting saw participation of a 114-Member strong Indian delegation comprising Senior Bureaucrats and State Officials from

Government of India, high-ranking Government Officials, CEOs of major Indian companies, Media and Civil Society representatives. As the lead coordinator for the Indian participation at this meeting, CII organised several events including the traditional annual 'India Reception' and the 'Bollywood Night'.

Discussions on Shaping India's future with Industry 4.0, in partnership with Deloitte and an Institutional Investors' Roundtable, in partnership with Kotak Mahindra led to vibrant discussions amongst the Indian and international delegates. Investment opportunities in Madhya Pradesh were showcased at a session organised in partnership with the State of Madhya Pradesh. Participants deliberated on creating equitable globalization in an Industry 4.0 world and how India could prepare for this emerging world in a session held in collaboration with Andhra Pradesh Economic Development Board and PwC.

CII Emerging Markets Forum

Launched in 2018, the CII Emerging Markets Forum (EMF) aims to offer targeted trade and investment facilitation services to Indian companies looking to expand business operations in the ASEAN, Central Asia and Africa. The Forum is in continuation of the endeavour to reorient services to keep pace with changing paradigms in the global trade and investment ecosystem.

The changing global economic dynamics offer companies greater opportunities in countries that have been less prominent on the trade and investment horizon in the past. Many of these markets are new frontiers at nascent stages of growth, offering immense business potential limited only by their regulatory and business uncertainties. Going forward, the EMF will act as a platform to address the issues faced by Indian Industry in Emerging Markets.

The launch function saw the release of the EMF Country Trade and Investment Report for Indonesia as well as sectoral factsheets on healthcare, energy and transport sectors in that country. In addition, two bespoke project advisory reports were also shared.

TRADE POLICY

The increasing uncertainty in the direction of global trade and emerging trends such as the rise of global value chains have triggered a shift in the international trade landscape. The changing dynamics of the multilateral trade agreements and the environment & social changes have given rise to new global debates and discussions. In this challenging scenario, the CII National Committee on International Trade Policy made efforts at making Indian exports globally competitive. The issues and interests of various trade associations, trade policy experts and major industry sectors such as textiles, metal, mining, chemicals, engineering & automobile, telecommunication, IT & ITeS and business services were taken up with policy makers, especially the Department of Commerce and Industry.

The Industry's stance on the possible impact of the mega regional Free Trade Agreements, such as the Regional Comprehensive Economic Partnership (RCEP) and the other FTAs India is currently negotiating, on the growth of Indian exports and the possible inclusion of new areas (such as e-commerce and investment facilitation) in the WTO was articulated during the year. Extensive work was also undertaken on Trade Related Standards and the draft e-commerce policy.

ADVOCACY

Detailed suggestions and representations were made to the Government on various issues impacting exports. These suggestions on the draft e-commerce policy ranged from cross border data flows to FDI

in e-commerce and also data localization. There was increased focus on the various FTAs India is negotiating/ renegotiating, specifically the RCEP, India Korea CEPA, the proposed India Sri Lanka ECTA among others. Considering that the RCEP negotiations are at a crucial stage, a report was prepared based on data analysis and consultations with stakeholders to present a possible approach for India's goods negotiations vis-à-vis China. This includes the offensive and defensive interests of Indian Industry and concurrent domestic measures required for Indian Industry to effectively leverage the RCEP.

Under the Department of Commerce's initiative to foster a robust standards regime in the country, representations were made on Sanitary and Phyto-Sanitary (SPS), Technical Barrier to Trade (TBT) and domestic regulations impeding India's exports. The Indian National Strategy for Standardization and a Study on SPS and TBT Notifications issued at WTO in 2016 were released at the National Standards Conclave. The SPS Study, prepared jointly with APG-SLG Law Offices, examines these notifications with respect to sectors such as chemicals, steel, marine products amongst others. A series of Regional Standard Conclaves were also organised across the country.

A report focused on deepening the Africa India trade relations was prepared in collaboration with the United Nations Economic Commission for Africa. Released at the CII EXIM Bank India Africa Growth Partnership, it examines the existing trade and investment relationship between India and the African countries.



From L to R: Dr Naushad Forbes, Past President, CII, and Co-Chairman, Forbes Marshall; Rita Teaotia, then Secretary, Commerce, Ministry of Commerce & Industry; Suresh Prabhu, Minister of Commerce & Industry and Civil Aviation, Government of India; Surina Rajan, Director General, Bureau of Indian Standards and Sudhanshu Pandey, Additional Secretary- Commerce, Ministry of Commerce and Industry, Government of India at the 5th National Standards Conclave in New Delhi

EXPORTS

India's exports are entrusted with a two-pronged target: one, of driving India's economic growth as the nation strives to become a US\$ 5 trillion economy by 2025 and second, of helping India find its place amongst the top ten trading nations by 2022. During the year, the CII National Committee on EXIM actively engaged with the Government of India to advocate for an ideal mix of policy instruments including fiscal incentives, institutional changes, procedural rationalization, enhancing market access across the world and diversification of export markets.

ADVOCACY

CII worked closely with the Directorate General of Foreign Trade (DGFT), Department of Commerce and Industry to facilitate an environment conducive to encouraging exports. Some of the key export related issues taken up with DGFT included credit availability to exporters to help them compete in international markets and ensuring smooth flow of funds.

Government support was sought for enabling exporters

to offset the cost disadvantage and non-abatement of taxes & duties by enhancing MEIS and duty drawback rates. Proposals were submitted for ways to revive Special Economic Zones (SEZs), encourage enhanced use of SEZ infrastructure and incentivizing exporters to invest in the expansion of existing operations and creating new employment opportunities.

ACTION

Enhancing Indian Industry's export competitiveness, increasing engagement with States and sustaining & increasing the current rate of growth in a volatile global trade environment were deliberated upon during the Exports Summit. Industry views were shared with Director General, DGFT on strengthening the Foreign Trade Policy, addressing critical bottlenecks in export incentive schemes and scaling innovation across sectors. Stakeholders also shared their perspectives on trade facilitation and export promotion strategies of the Government, engaging States and focus sectors in driving higher exports.



From L to R: Sanjay Budhia, Chairman, CII National Committee on EXIM and MD, Patton International Ltd; Alok V Chaturvedi, Director General of Foreign Trade – DGFT, Ministry of Commerce and Industry; Suresh Prabhu, Minister of Commerce and Industry & Civil Aviation, Government of India; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises and Naishad Parikh, Chairman, Equinox Solutions Ltd and Director, AIA Engineering Ltd at the CII Exports Summit 2018 in New Delhi

TRADE FAIRS

Fairs, expositions and exhibitions, organised by CII, are an important business service for Members and other stakeholders in an era defined by disruptive innovations and advanced technologies. Efforts are made to maintain a leadership position through continuous innovation and building scale. Value is delivered to Membership by not only imbibing global best practices, but by setting benchmarks with high quality business generating environments and a drive to deliver customer delight. A large part of the work is focused on expansion in strong and emerging geographical markets.

Global Exhibition on Services 2018

The 4th edition of Global Exhibition on Services (GES) was a global platform for increased trade in services, enhanced strategic cooperation and strengthened multilateral relationships amongst stakeholders. Held in Mumbai, in association with the Ministry of Commerce and Industry and Services Export Promotion Council (SEPC), it was an opportunity for businesses to explore new avenues. Inaugurated by President of India, Shri Ram Nath Kovind, GES 2018 attracted over 628 exhibitors, 500 overseas delegates from 100 countries

and hosted over 8000 B2B, G2B, B2G meetings across 22 sectors and 40 knowledge sessions.

International Rail Coach Expo 2018

A CII initiative, in association with the Integral Coach Factor (ICF), Ministry of Railways, the International Rail Coach Expo (IRCE 2018) focused on rail coach and train sets. The first of its kind exhibition attracted participation of over 100 exhibitors from 14 countries, 12450 visitors, and more than 400 delegates from Indian Railways.

Bengaluru Space Expo 2018

Satellites, launch vehicles and related products and technologies were on exhibit at the 6th Bengaluru Space Expo 2018 (BSX'18), Asia's only exhibition in this area. Held in association with Antrix Corporation Ltd and Indian Space Research Organisation (ISRO), the BSX was a confluence of over 104 exhibitors including 16 ISRO centres, 56 speakers and 744 delegates. The expo received participation from over 15 countries, including Belarus, Belgium, France, Germany, Hong Kong, India, Lithuania, Norway, Malaysia, Russia, Singapore, Taiwan (RoC), Thailand, UK, and USA.



Ram Nath Kovind, President of India at the GES 2018 Exhibition in Mumbai. From L to R: Chandrajit Banerjee, Director General, CII; Suresh Prabhu, Minister of Commerce and Industry & Civil Aviation; Ram Nath Kovind and Devendra Fadnavis, Chief Minister of Maharashtra



From L to R: Rakesh Sasibhushan, CMD, Antrix Corporation Ltd; Jean-Yves Le Gall, President, CNES; Dr K Sivan, Chairman-Space Commission, Secretary, Department of Science and Chairman, ISRO and Kris Gopalakrishnan, Past President, CII and Chairman, Axilor Ventures at the Space Expo 2018 in Bengaluru



Brune Poirson, Secretary of State, Ministry Of Ecological and Inclusive Transition, Government of France and R K Singh, Minister of State (I/C) for Power & New and Renewable Energy, Government of India at the 2nd Global RE-Invest Renewable Energy Investors' Meet and Expo in Greater Noida

Re-Invest 2018

During the year, increased thrust was given to renewable energy with a series of programmes being hosted in association with the Ministry of New and Renewable Energy and IREDA. The 1st Assembly of International Solar Alliance (ISA), the 2nd Renewable Energy Ministerial Meet of the Indian Ocean Rim Association (IORA), and 2nd Global RE-INVEST 2018 and the India-ISA Partnership Conference & Expo were organised in Noida. The importance being accorded to renewable energy by the Government was emphasized by the inauguration of these events by Shri Narendra Modi, Prime Minister of India, in the presence of Antonio Guterres, Secretary-General of the United Nations in New Delhi. RE-INVEST 2018 recounted India's efforts at meeting the 175 GW renewable energy target by 2022.

International Mining and Machinery Exhibition 2018

Live demonstration of mining equipment and machinery, in an outdoor display area, by some large brands brought a unique aspect to the 14th International Mining and Machinery Exhibition (IMME). Of the 245 exhibitors, who participated in IMME 2018 in Kolkata, 71 overseas exhibitors from Australia, Canada, China, Czech Republic, Germany, Italy, Russia, Turkey, UK and USA, were accompanied by high level delegations. With the Government of Jharkhand as the partner State, the exhibition had the support of Ministry of Coal, Ministry of Mines, Ministry of Steel, Department of Heavy Industry and Coal India Ltd. Germany was the partner country and Australia, the country in focus this time. As always, the Global Mining Summit (GMS) was held concurrent to the IMME.



From L to R: Leonie Muldoon, Senior Trade Commissioner, Australian Trade Commission; Anil Kumar Jha, Chairman, CII National Committee on Mining and Chairman Coal India Limited; Dr Amit Mitra, Minister of Industry, Commerce & Enterprise, Finance, MSME and Textile, Government of West Bengal; Michel Feiner, Consul General of the Federal Republic of Germany and Mehul Mohanka, Chairman, CII Mining Construction Equipment Division and MD & Group CEO, Tega Industries at the 14th International Mining and Machinery Exhibition in Kolkata



From L to R: Sachin Agarwal, MD, PTC Industries; Kumar Keshav, MD, LMRC; Sachit Jain, Chairman, CII NR and Vice Chairman and MD, Vardhman Special Steels Ltd; Virendra Kumar, DG, RDSO; Tilak Raj Seth, Chairman, Innorail Conference & Executive Vice President, Siemens Ltd and S K Singh, ED (Research) RDSO at the 3rd InnoRail India Show in Lucknow

InnoRail India 2018

Stakeholders of the rail transportation sector networked with international businesses at the 3rd InnoRail India Show, organised in association with Research Designs & Standards Organisation (RDSO), Ministry of Railways and Lucknow Metro Rail Corporation (LMRC). With Germany as the focus country and with over 120 exhibitors from 12 countries, InnoRail India 2018 witnessed a footfall of over 8000 visitors. The future procurement plans of RDSO, Indian Railways, Zonal Railways and LMRC, especially with respect to modernization of Railways, were shared with the exhibitors.

At panel discussions, held concurrent to the exhibition, discussions revolved around enhancing speed & throughput of Indian Railways, emerging opportunities in the value chain – Business for the Businesses and Reshaping Urban Transportation in India – Catapulting to the Next Level.

International Engineering & Technology Fair 2019

The 23rd International Engineering & Technology Fair (IETF), CII's flagship event, featured three concurrent

events – Health Tech India, India Gaming Show, and AI India Expo. The six specific sectors covered through the exhibition as well as conferences, included industrial automation & robotics, logistics solutions, metal & metallurgy, real estate & building technology, green & clean environmental technologies, and learning & skill development.

Supported by Ministries of External Affairs, Ayush, Electronics & Information Technology, Health & Family Welfare, and Steel as well as the National Small Industries Corporation (NSIC), the exhibition saw participation of 500 companies from 25 countries. The 3-days show attracted over 25000 visitors and witnessed over 5500 B2B meetings.

Experience zones driven by artificial intelligence, special AI showcase by women entrepreneurs, free breast cancer check up for women participants and E-Sports added a uniqueness to IETF, 2019.

India Pavilions in Overseas Shows

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

- Build Tech 2018, Ukraine
- InterTool 2018, Austria
- Wampex 2018, Ghana
- India Pavilion at 4th Bangladesh Buildcon 2018, Bangladesh
- India Pavilion at Expo Nacional Ferretera 2018, Mexico
- India Pavilion at 7th Srilanka Buildcon International Expo 2018, Sri Lanka



From L to R: Wilfred Gonzalez Vidal, First Vice Minister, Republica De Cuba; Oscar Martinez Cordoves, Ambassador of Cuba; Ado Leko, Ambassador of the Republic of Niger, Vipin Sondhi, Chairman, CII Trade Fair Council and MD and CEO, JCB India Ltd; Boureima Souleymane, Second Counsellor, Embassy of the Republic of Niger to India; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises; Chandrajit Banerjee, Director General, CII; Gaurav Gupta, Principal Secretary, IT, BT and S&T, Karnataka; Deepak Kumar, Executive Director, India Trade Promotion Organisation and Rajan Navani, Chairman, CII Artificial Intelligence India and MD, Jetline Group of Companies at the IETF 2019 in New Delhi



From L to R: Rabi Singh, President, Federation of Contractors Association (FCAN); Mahesh Basnet, Member of Parliament; Manjeev Singh Puri, Ambassador of India to Nepal; Raghbir Mahaseth, Minister for Physical Infrastructure and Transport, Nepal; Vipin Sondhi, Chairman, CII Trade Fair Council and MD and CEO, JCB India Ltd and Arvind K Garg, Chairman, ConMac Nepal 2018 at ConMac 2018 in Nepal

- India Pavilion at 5th Nepal Buildcon International Expo 2019, Kathmandu, Nepal
- India Pavilion at BIG5 QATAR 2018, Qatar
- KOAA 2018, Korea
- Big5 East Africa 2018, Kenya
- India Pavilion at 5th Nepal Buildcon International Expo 2019, Kathmandu, Nepal
- India Pavilion at ADIPEC 2018 in Abu Dhabi

ConMac 2018 - Nepal Edition

The 1st edition of ConMac in Nepal, was the largest construction equipment exhibition in the country. Held in association with the Embassy of India in Kathmandu, the effort was supported by the Federation of Contractors Association, the Asian Institute of Diplomacy and International Affairs and the Indian Construction Equipment Manufacturers' Association (ICEMA).

More than 100 exhibitors from India and Nepal showcased latest technology and equipment for

accelerated infrastructure growth in Nepal. Over 5000 business visitors from sectors such as contracting community, Government, large infrastructure companies and the defence benefitted from the exhibition.

Enterprise India - Myanmar 2018

The Enterprise India Show in Myanmar was themed 'Building Relationships, Nurturing Growth'. The Embassy of India, Yangon, Myanmar; Department of Commerce, Ministry of Commerce & Industry, Government of India; Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI) and the India Myanmar Chamber of Commerce (IMCC) partnered CII for this exhibition.

Jointly inaugurated by Shri Ram Nath Kovind, President of India and Mr U Myint Swe, Vice President (1) of Myanmar, the occasion was witnessed by a large number of ministers and Government officials from Myanmar and India as well as senior CII Members. With over 300



Ram Nath Kovind, President of India at the Enterprise India Show in Myanmar



The Indian Exhibition Industry Awards 2018 in 3 categories and the Best International Pavilion Award at ADIPEC, Abu Dhabi conferred on CII

business queries being generated, the exhibition created a platform for trade & commerce for the 70 Indian companies and more than 3200 business visitors. More than 30 business delegations, and a focused conference on 'forging Industry partnerships' explored long term business opportunities between the two countries.

Future Mobility Show

The 1st edition of Future Mobility Show, held in Bengaluru, was supported by stakeholders including ACMA, SIAM, SMEV, APEV of Japan, ARAI, PCRA, SAE India, TERI, Char-in, Germany, amongst others.

The FMS 2019 was a unique platform aimed at accelerating the transformation of India's mobility sector by bringing stakeholders together to prepare an EV roadmap for a shared, connected clean and efficient



From L to R: Manoj Kohli, Chairman, CII Task Force on Electric Mobility and Battery Storage and Executive Chairman, SB Energy (SoftBank Group); Vikram Kirloskar, Vice President, CII and MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor; K J George, Minister for Large and Medium Scale Industry, Government of Karnataka; Chandrajit Banerjee and C V Raman, Chairman, CII Steering Committee on FMS 2019 and Senior Executive Director (Engineering and R&D), Maruti Suzuki India Ltd at the Future Mobility Show in Bengaluru

future. The exhibition witnessed more than 75 exhibitors and 12875 business visitors.

Awards and Accolades

Domestic

Over the last 40 years, CII has pioneered trade fairs in India and set many 'best practices and benchmarks' for the country's exhibition organisers. CII was conferred three awards, in the first ever such market researched awards organised in the Indian exhibition Industry. These included the number 1 organiser of Trade Fairs amongst the top 10, the Top B2B Category Show for Excon and the first runner up for Auto Expo in the Top B2C Category Show.

Overseas

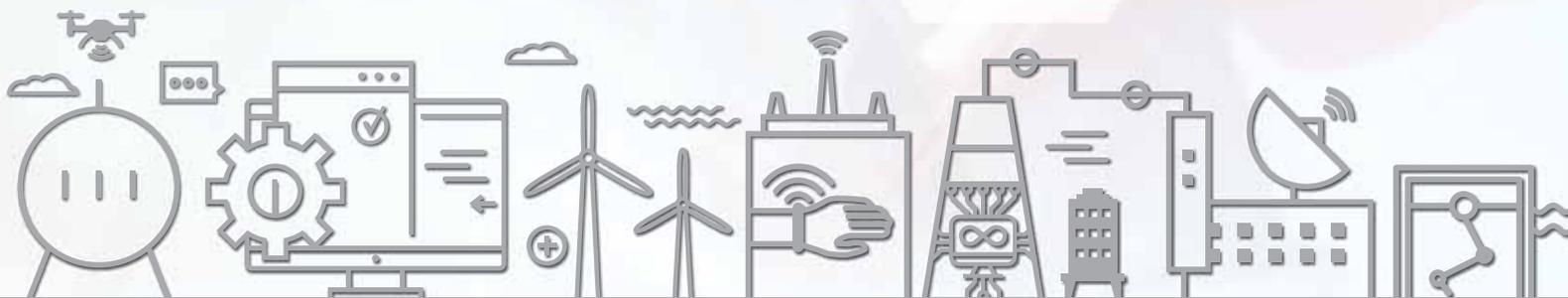
ADIPEC 2018, in its 34th edition, is one of the world's largest exhibitions & conferences in the oil & gas sector. Covering more than 155,000 gross square meters space, it hosted 28 country pavilions including Belgium, Canada, China, Denmark, France, Germany, India, Italy, Japan, Netherlands, Norway, Russia, Singapore, South Korea, UK and USA.

The participation of 72 companies at the India Pavilion made it one of the largest in the exhibition. The pavilion, organised with support of Ministry of Commerce and Industry, was awarded the 'Best International Pavilion'.



Sultan Ahmed Al Jaber, Minister of State, Government of UAE and Director General & CEO of ADNOC and Dharmendra Pradhan, Minister, Petroleum & Natural Gas, Skill Development & Entrepreneurship, Government of India at the India Pavilion at ADIPEC 2018 in Abu Dhabi

SECTORSCAPE



- › Agriculture, Food Processing, Allied Sector & Nutrition
- › Manufacturing
- › Infrastructure
- › Defence & Aerospace
- › Space
- › Energy
- › Fast Moving Consumer Goods
- › Services
- › Health & Life Sciences
- › Micro, Small & Medium Enterprises
- › Public Sector Enterprises



AGRICULTURE, FOOD PROCESSING, ALLIED SECTOR & NUTRITION

For the year 2018-19, the CII National Council on Agriculture aligned its work to 'India Rise', the overarching organisational theme for the year. The work focused on making agriculture responsible, inclusive, sustainable, and entrepreneurial. In pursuit of this objective, five key areas of intervention were identified to make agri production and marketing systems efficient and reduce farmer distress. These include encouraging aggregation to build scale, leveraging advanced technologies for production forecasting and planning, mitigating risks by scaling crop insurance, unlocking greater value by bringing efficiency in agriculture marketing and creating an enabling policy and regulatory environment.

ADVOCACY

Given that small farmers receive only an insignificant percentage of the price paid by the consumer to the middleman, aggregation to build scale is key to reducing farmer distress. FPOs are being promoted by Small Farmers Agribusiness Consortium (SFAC), National Bank for Agriculture & Rural Development (NABARD) as well as State Governments under the National Policy for Promotion of Farmer Producer Organizations (FPOs). A national policy paper, submitted to the Government, has made recommendations on addressing the challenges

that continue to impede FPO's growth. Going forward, stakeholder consultations on the FPO policy framework will be undertaken in partnership with the Ministry of Agriculture & Farmers Welfare (MoAFW).

A dialogue on how advanced technologies can be leveraged for managing demand driven production and reducing farmer stress from supply fluctuations was initiated with MoAFW. The wide ranging solutions offered by remote sensing for agriculture were presented to Mr Sanjay Aggarwal, Secretary, Department of Agriculture & Cooperation. Follow up meetings with Mahanalobis National Crop Forecast Centre (MNCFC) and ISRO, deliberated upon possible pilots to assess village level yields using RST and GIS.

Recognising that agriculture is fundamentally a risky economic activity, the Government has taken concrete steps to scale up crop insurance. Taking cognizance of the challenges related to farmer awareness and enrolment, business processes, loss assessments, claim settlements, technology uptake and infrastructure gaps, MoAFW issued revised Operational Guidelines for the Pradhan Mantri Fasal Bima Yojana (PMFBY). CII further plans to engage with the MoAFW on strengthening technology related to PMFBY.



P K Swain, Joint Secretary, Marketing, Ministry of Agriculture and Farmers' Welfare addressing the CII-MoAFW workshop on scaling trade through e-NAM in Hyderabad. From L to R: B Thiagarajan, Co-Chairman, CII National Council on Agriculture and MD, Bluestar Ltd; S Sivakumar, Chairman, CII Expert Group on Doubling Farmers' Income and Group Head - Agri & IT Businesses, ITC Limited; C Parthasarathi, APC & Principal Secretary, Agriculture and Co-operation, Telangana; Samuel Anand Kumar, Special Commissioner & Director of Marketing, Andhra Pradesh and G Lakshmi Bai, Director, Agriculture Marketing, Telangana



Radha Mohan Singh, Minister of Agriculture meets Salil Singhal, Chairman, CII National Council on Agriculture and Chairman Emeritus, PI Industries Ltd under the Sampark se Samarthan campaign in New Delhi

With a view to strengthening the proposed Ease of Doing Agri-Business (EoDAB) Index, being developed by the Ministry, suggestions were made towards broad-basing the scope as well as recalibrating parameters included in the index.

The recommendations made by the CII Expert Group on Doubling Farmers' Income included increasing capital formation, strengthening access to technology and market linkages as key prerequisites for enhancing farmers' incomes. Areas such as bee keeping, sericulture, bamboo cultivation are being explored for supplementing farmer incomes. Industry recommendations on Dr Dalwai Committee Report on Doubling Farmers' Incomes with specific reference to seeds, crop protection, fertilizers and risk management were also shared with the Government.

ACTION

To understand the ground level challenges impeding e-NAM's growth, five workshops were conducted in

partnership with MoAFW. Stakeholders from Andhra Pradesh, Gujarat, Haryana, Himachal Pradesh, Kerala, Madhya Pradesh, Maharashtra, Odisha, Punjab, Rajasthan, Telangana, Tamil Nadu, Uttar Pradesh and Uttarakhand across the agri-marketing supply chain, participated in these consultations. Issues such as lack of equipment in mandis, tedious bidding processes, distance between mandis & production clusters and lack of logistics facilities highlighted through these consultations are being addressed by the Ministry.

Two multi commodity transaction haats in Assam were identified for showcasing a viable GrAMS conversion model through post harvest interventions and infrastructure creation. Discussions were also initiated with other State Governments for the GrAMS project.

CII initiated work on an alliance between farmers and Industry to help strengthen the farmer-Industry linkage.

A compendium on private sector extension initiatives is being curated by CII.

FOOD PROCESSING

The CII National Committee on Food Processing Industries aligned with the CII National Agriculture Council on Doubling Farmers' Income by 2022. Efforts were thus centred around positioning India as the 'rising' global food manufacturing, sourcing and exporting hub. In this direction, several initiatives were launched in close partnership with the Ministry of Food Processing Industries (MoFPI) State Missions on Food Processing,



From L to R: Ashwini Malhotra, Co-Chairman, CII National Committee on Food Processing Industries and MD, Weikfield Foods Pvt Ltd; Arun Maira, Former Member, Planning Commission of India; Harsimrat Kaur, Minister, Food Processing Industries; Suresh Narayanan, Chairman CII National Committee on Food Processing Industries; Chairman & MD, Nestle India Ltd; Rajesh Srivastava, Executive Chairman, Rabo Equity Advisors and Pankaj Mehta, MD, Carrier Transcold-India & South Asia at the National Food Processing Conclave in New Delhi

Food Safety Standards Authority of India (FSSAI), Ministry of Agriculture & Family Welfare (MoAFW) National Centre for Cold Chain Development (NCCD) and the National Horticulture Board (NHB). During the year, action was taken to catalyse investments in infrastructure, create an enabling environment for innovation, strengthen farmer-Industry linkages to help reduce post-harvest losses and increase farmer incomes by building Brand India.

ADVOCACY

To complement the Government's efforts, CII partnered MoFPI across a spectrum of programmes, such as the promotion of PMKSY scheme across the country. The cluster level interventions required for three crops under the operation greens scheme were identified based on a mapping of the supply chain gaps. A three-pronged approach of multiplying production, reducing wastage and creating necessary enabling agri processing infrastructure was proposed.

Representations were made to the Government to ensure that GST rates on food items do not trigger inflation and ensure that rates are more or less at par with current indirect tax regime.

ACTION

The National Food Processing Conclave was themed Roadmap for Indian Food Processing Industries 2.0. Action points identified by the stakeholders during the deliberations include-focus on investment & innovation; focus on traceability & sustainable sourcing; enhanced uptake of technology and leveraging traditional food knowledge of India.

ALLIED SECTOR

To create Government - Industry synergy on the allied sector agenda, a National Committee on Allied Sectors in Agriculture was constituted. The focus is to strengthen the growth of allied sectors i.e. dairy, fisheries and poultry and thus the Indian farming community at large. Special programmes are being designed to enable small farmers improve their capacity to adopt high value commercial activities.



From L to R: M Ponnuswami, Chairman, CII Tamil Nadu and Chairman & MD, Pon Pure Chemical India Pvt Ltd; C Muthazhagan, General Manager -Quality Control, Tamil Nadu Civil Supplies Corporation; Deepti Gulati, Head-Programs, GAIN India; Deeksha Bhatt, Coordinator, Food Fortification Resource Centre, FSSAI and T Madhusudhan Rao, Lead - Nutrition, TATA Trust at the CII GAIN FSSAI - Zonal Consultation on Scaling Up Staple Food Fortification in Chennai

Trade and capacity building opportunities with Japan are being mapped for fisheries and schemes are being outlined to encourage NABARD and World Bank to participate in specific development funds. Discussions on issues related to use of antibiotics in the allied sectors were triggered with FSSAI and the nodal Ministry.

NUTRITION

During 2018-19 the work on nutrition revolved around policy advocacy, building consumer connect, capacity building and knowledge creation. The National Committee on Nutrition engaged with the NITI Aayog, Ministry of Woman and Child Development, MoFPI and Ministry of Consumer Affairs to align its actions with the National Nutrition Strategy and tackle the malnutrition challenge.

Zonal consultations on scaling up food fortification were organised in partnership with Global Alliance for Improved Nutrition (GAIN) and Food Safety and Standards Authority of India's (FSSAI) Food Fortification Resource Center (FRRC), coinciding with the Government initiative Swasth Bharat Yatra.

An online compendium on private sector nutrition initiatives, envisaged as a collaborative platform for partnerships, is being curated by CII.

MANUFACTURING

As India continues to remain the beacon of a fast growing economy, with its GDP expected to reach US\$ 5 trillion by 2025, manufacturing has assumed strategic importance. The Government, in association with Industry, aims to grow its manufacturing GVA to US\$ 1 trillion by 2025. Ranked 6th amongst the world's largest manufacturing countries, India is expected to march up to the top three destinations by 2020. In the recent years, India has undertaken massive structural reforms towards formalization of the economy and identification of specific interventions necessary to foster manufacturing growth. Going forward, to achieve the US\$ 1 trillion target, manufacturing output needs to grow by close to 3x with a CAGR of 12%.

During the year, the CII Manufacturing Council focused on taking forward the Government's vision of US\$ 1 trillion manufacturing GVA. The Council worked closely with the Department for Promotion of Industry and Internal Trade (DPIIT), formerly DIPP towards developing a roadmap to achieve this milestone along with developing sectoral roadmaps.

Through a detailed consultative process and deep engagement with various ministries, select sectors

that can contribute significantly to the US\$ 1 trillion manufacturing GVA were identified. The short-listed focus sectors include (based on their contribution, size and potential) automotive, textiles, chemicals, electronics, capital goods, food processing, pharmaceutical, metals and mining.

The constraints, opportunities and key policy actions that will provide these manufacturing sectors the basic building blocks were drawn up in consultation with Industry during a national forum in December 2018. The National Policy Forum deliberations with DPIIT (formerly DIPP) were followed up with formation of sectoral Task Forces that will engage with the Government on the roadmap.

Deliberations were directed at addressing challenges and concerns related to the cost of doing business, import substitution and enhancing exports. Implementation of the Public Procurement Order, its potential for manufacturing industry and the possibilities of leveraging the Order were advocated during the year. DPIIT (formerly DIPP) invited inputs from Industry on the challenges and issues relating to the Order, as well as the Free Trade Agreements (FTAs), specifically the RCEP.



Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation addressing the CII-DPIIT National Forum in New Delhi. From L to R: Deep Kapuria, Co-Chair, CII National Manufacturing Council and Chairman, The Hi-Tech Group; Dr Pawan Goenka, Chairman, CII National Manufacturing Council and MD, Mahindra & Mahindra; Ramesh Abhishek, Secretary, DPIIT (formerly DIPP) and Chandrajit Banerjee, Director General, CII

SMART MANUFACTURING

With the onset of advanced technologies such as Industrial Internet of Things (IIoT), 3D printing, robotics, the manufacturing landscape is experiencing significant shifts. With Industry 4.0 several advanced economies are reaping the benefits of increased productivity, better quality, speed, security and customisation.

The CII Smart Manufacturing Council undertook significant work to create the necessary building blocks for accelerating adoption of smart manufacturing in India. Efforts were made to create a framework that works at various levels – macro (ecosystem), meso (institutions) and micro (firm).

Several initiatives were launched to address issues such as lack of technology infusion, awareness of benefits of smart manufacturing, high costs of hardware & software, and lack of a nodal ministry/central platform to drive smart manufacturing in India.

A national consultation, in partnership with the Department of Heavy Industry (DHI), focused on drafting an action plan and a five-year roadmap for adoption of smart manufacturing in India. The creation of an India Industry 4.0 platform, an empowered central body led by Government and driven by Industry, was strongly advocated for.

A CII portal www.ciismart.in, showcasing detailed case-studies of 30 Indian companies that have deployed smart manufacturing, was launched at the 4th CII Smart Manufacturing Summit. The Summit also enabled companies to 'explore' use cases of smart manufacturing, 'connect' with smart manufacturing leaders and find the right partners to 'implement' and take forward their smart manufacturing journeys.

The contours of transformation witnessed by the manufacturing sector with the advent of smart manufacturing can be better understood by seeing.

A Learning Mission to Germany witnessed deployment of next generation manufacturing practices and business models during visits to Wetropa, TU Darmstadt, Samson AG and Lapp Kabel factories.

ADVANCED MATERIAL, COMPOSITES AND TECHNICAL TEXTILES

Given the critical benefits delivered by advanced materials, the use of composites and technical textiles was promoted in sectors of national importance such as aerospace & defence, railways, transportation, building & construction, marine and energy to support 'Make in India'. A conference, organised alongwith the Bureau of Indian Standards (BIS), focused on the strategic importance of evolutionary materials with revolutionary materials. Possible industrial applications of composites, technical textiles and rare earth materials were deliberated upon and Prof K VijayRaghavan, Principal Scientific Adviser to the Government of India released a report on Rare Earth Industry Value Chain in India.

CII is strongly committed to working constructively with all stakeholders in area of advanced composites. An Industry-led approach paper on the use of Glass Reinforced Plastic (GRP) Pipes for potable water, irrigation and sewerage systems was put together. The paper recommends guidelines for manufacturing in compliance with international standards. It has been submitted to the CWC, Ministry of Water Resources for inclusion of service life and other technical properties of GRP pipes.



From L to R: Dhananjay Tapasvi, MD, Owens-Corning (India) Pvt Ltd; D Singh, Chairman & MD, Indian Rare Earths Ltd; Prof K VijayRaghavan, Principal Scientific Adviser to the Government; Surina Rajan, Director General, BIS; Punit Lalbhai, Executive Director, Arvind Ltd and Shantanu Agarwal, Vice Chairman, CII Technical Textile Division and Executive Director, BMD Pvt Ltd at the National Conference on Advanced Materials in New Delhi



Dr V K Saraswat, Member, NITI Ayog addressing the 3rd Capital Goods Summit in New Delhi Summit. From L to R: Amita Sarkar, Deputy Director General, CII; Nikhil Sawhney, Co-Chairman, CII National Committee on Capital Goods & Engineering and Vice Chairman & MD, Triveni Turbine Ltd; Atul Sobti, Chairman, CII National Committee on Capital Goods & Engineering and Chairman & MD, Bharat Heavy Electricals Ltd and Amar Kaul, Chairman, CII Capital Goods Summit and Chairman & MD, Ingersol Rand India Ltd

CAPITAL GOODS

The capital goods sector is of strategic importance to India's economic growth, given its potential to have a multiplier effect. With a clear focus on giving this sector a thrust, CII worked with the Department for Promotion of Industry and Internal Trade (DPIIT), formerly DIPP and Department of Heavy Industry (DHI) to facilitate implementation of the Public Procurement Order (Make in India) 2017.

The concerns of the capital goods sector, arising out of the imposition of tariff and non-tariff barriers to curb steel imports, were addressed by bringing together users and producers. As result, specific steel products were exempted from mandatory BIS certification for manufacturing of a capital goods till the time the required grade of steel is manufactured in India. A strong case against the import of second hand/defective capital goods machinery was made to the DPIIT. Opportunities for capital goods sector and role of technology in enhancing the competitiveness of the sector were explored at the 3rd edition of CII-DHI Capital Goods Summit.

CEMENT

India is the second largest producer of cement in the world, making the sector significant to the country's economy. Providing employment to more than a million people, the sector attracts huge investments too. Improved competitiveness and increased demand are key to this sector's growth and enhanced contribution to the GDP. CII worked to resolve issues with respect to smooth backward integration of the cement sector; import of cement from Pakistan and Bangladesh; paucity

of sand and evacuation of cement clinker; decongestion of railway routes and modernization of unloading terminals. In an interaction with Dr Niranjana Kumar Singh, Joint Secretary, Ministry of Mines, the matter related to limestone mining by cement sector and the regulatory hurdles were discussed.

CHEMICALS

Chemicals hold vast potential to transform global challenges into opportunities. The sector can become a catalyst for sustainable and equitable growth, if provided a conducive policy framework. For the first time, policy makers and Industry leaders thus came together at a conference to deliberate on building a robust policy framework towards vision 2040 for this sector. The need for a regulatory framework, concerns regarding rising environmental issues and steps necessary for achieving 2X growth in exports were some of the key factors in Indian Chemical and Petrochemical Conference (ICPC) 2018: Vision 2040 Building a Robust Policy Framework. Feedstock security, revival of PCPIRs, building a national chemical inventory and studying global EHS practices were defined as vital pre-requisites to facilitate the sector's growth. A report on current scenario and the road ahead for the chemicals and petrochemicals sectors was also compiled.

Follow up with the Government on renewal and issue of new permits for import of biocides, a key paint industry input, yielded satisfactory results. Trade policy issues, including RCEP, were discussed with the Government and inputs provided on trade negotiations such as the India Peru Trade Agreement and India Sri Lanka Economic and Technology Cooperation Agreement.

ICTE MANUFACTURING AND OFFICE AUTOMATION & IMAGING

In India, the Information Communication Technology & Electronics (ICTE) Industry is witnessing continuous consumption growth. ICTE manufacturing, which accounts for about 10% of India's manufacturing GDP, has the potential to become a key driver of manufacturing growth in the country. Increased competitiveness of investments, encouraging value-addition and development & strengthening of supporting component manufacturing base and export promotion are therefore critical for the sector. While pursuing these areas, CII also mobilized suggestions for the review of the National Policy on Electronics, 2012.

During the year, recommendations were made to the Government for adopting alternative methodologies for compensating the disability arising on account of high cost of finance, power & logistics, incentivizing value-added manufacturing and development of component manufacturing through Phased Manufacturing Programmes (PMP) for growth driving products, reviewing products under zero BCD, integrating Industry concerns in the Review of National Policy in Electronics 2012, and implementation of Preferential Market Access (PMA), both, by the Central and State Governments in line with the Make in India initiative.

The 1st Electronics Summit, while positioning electronics as a building block, also discussed strategies for growth. A report on success stories of Indian companies and country-level success stories, in electronics

manufacturing was also released at the Summit by the Minister for Electronics & IT.

Following the Electronics and Information Technology Goods (Requirement for Compulsory Registration) Order, 2012, manufacturers of these products are required to get their products tested and registered with Bureau of Indian Standards (BIS). An interactive session on market surveillance thus discussed the need for a more robust CRO compliance system, to ensure that only genuine BIS compliant products reach the market.

MINING

India is a mineral rich country, producing as many as 95 minerals that include 4 fuels, 10 metallics, 23 non-metallic, 3 atomic and 55 minor minerals. While the Industry has the potential to contribute 6-7% to National GDP, its contribution is limited by the regulatory framework and concerns related to sustainability. Efforts were thus directed at developing a responsible mining industry, addressing the regulatory hurdles and the uncertainty surrounding the leases expiring in 2020.

Engagement with the Ministry of Mines was focused on improving ease of doing business in the sector and providing workable inputs on the draft National Mineral Policy. These included a proposed revision of royalty rates, dead rent for minerals, usage of Calcined Petroleum Coke (CPC) in the aluminium industry, among others. A roadmap for making India's mining sector more sustainable was discussed with senior Minister of the Government of West Bengal at the Global Mining Summit in Kolkata. A report highlighting the short-term



Ravi Shankar Prasad, Minister for Law & Justice and Electronics & IT at the CII Electronics Summit in New Delhi. From L to R: Vinod Sharma, Chairman, CII National Committee on ICTE Manufacturing and MD, Deki Electronics Ltd; Chandrajit Banerjee; Dr Rajiv Kumar, Vice Chairman, NITI Aayog; Ajay Prakash Sawhney, Secretary, Ministry of Electronics & IT; Sunil Vachani, Co-Chairman, CII National Committee on ICTE Manufacturing and Chairman & MD, Dixon Technologies and Manish Sharma, President & CEO, Panasonic India & South Asia



From L to R: Binoy Kumar, Secretary, Ministry of Steel; Dharmendra Pradhan, Minister of Petroleum & Natural Gas and Skill Development & Entrepreneurship; Chaudhary Birender Singh, Minister of Steel; Naveen Patnaik, Chief Minister of Odisha; Anant Gangaram Geete, Minister of Heavy Industry and Public Sector Enterprises; Dr Aruna Sharma, Former Secretary, Steel and Chandrajit Banerjee at the Conclave on Capital Goods for Steel Sector in Bhubaneswar

and long-term issues facing India's mining sector and the way forward was presented to the Minister.

RAIL TRANSPORTATION AND EQUIPMENT

The interests of companies engaged in railway infrastructure development, equipment manufacturing, technology providers and logistics services providers were represented and suggestions to fast track growth of the rail transportation and equipment industry were shared with the Ministry of Railways, Railway Board and other nodal bodies. The role of technology in transforming Indian railways was advocated and opportunities for Indian rail industry to participate in the Mumbai Ahmedabad High Speed Rail (MAHSR) project were identified.

A concerted effort was made to enable Indian railways to adopt the best practices followed internationally while awarding projects. The Chairman, Railway Board led a business delegation to InnoTrans at Messe Berlin, Germany, the leading international trade fair for transport technology. The Chairman also agreed to initiate a continuous dialogue between the Railway Board, Research Design & Standards Organisation (RDSO) and Industry to deliberate on policy reforms. Various seminars and workshops, organised in partnership with Government agencies, helped unravel the renewed vision of the Railways and underscore the emerging opportunities for the Industry players. As a result of the continued engagement, rationalisation of the vendor approval process is underway to facilitate induction of new technology in Indian Railways.

STEEL

Today India stands as the third largest manufacturer of steel in the world. With the Government setting a target of 300 million tonnes of production capacity by 2030, this sector is likely to become the second largest in the world. To give a thrust to this objective, the CII National Committee on Steel focused on demand creation, preventing steel dumping, enhancing raw material security and pitching for availability of adequate liquidity in the steel ecosystem.

To improve participation in auction of coking coal blocks, it was recommended that such blocks be auctioned exclusively for end use in the steel sector, with flexibility to dispose the non-coking coal as well as coal by-products. Disincentivizing exports of graphite electrodes either through imposition of fiscal measures (such as substantive export duty) or through quantitative restrictions was also suggested. The Ministry of Steel was requested to consider giving iron and steel plants a minimum of five years for adopting environmental standards and guidelines.

A Conclave, organised alongwith the Ministry of Steel and MECON, endeavoured to identify the needs of the steel sector and to explore opportunities available for steel plant equipment manufacturers and spare parts producers to develop indigenous capacity.

TEXTILES AND APPAREL

The Indian textile industry, currently at US\$ 127 billion, is poised to reach US\$ 300 billion by 2025. Amongst the major contributors to India's exports, currently the



CII Report - Weaving a new textile sector for India: Vision 2030, released by Christine Kaufmann, Chair of the OECD Working Party on Responsible Business Conduct, at OECD Forum on Due Diligence in the Garment and Footwear Sector in Paris

sector accounts for approximately 13% of the total exports worth US\$ 37 billion. Achieving the ambitious target involves focus on manufacturing excellence, upgrading technology and skill development. CII National Committee on Textiles & Apparel, during TEXCON 2018 facilitated a discussion on actions necessary across the value chain for achieving this target.

Recommendations on GST and suggestions for revising rates for Rebate of State Levies (ROSL) & Fixation of Drawback Rates (DBK) with respect to the textile and apparel sector were submitted to the Government. Amendment in Rules of Origin, access to key markets such as EU and US, trade negotiations with critical countries were also taken up. A dialogue on promoting investment in responsible behaviour for enhancing competitiveness of India's textile sector was triggered in association with OECD. The specific focus was on promoting dialogue between the companies operating and international brands. 'Weaving a New Textile Sector for India: Vision 2020', was developed and released at the OECD Forum on Due Diligence in the Garment and Footwear Sector in Paris.

Technical Textiles offer immense potential for India's textile and apparel sector to leapfrog to the next level of growth. This sector is expected to achieve a size of US\$ 32 billion by FY 2023. To give a fillip to this sector, the work during the year revolved around resolving concerns related to demand, definition of technical textiles based on HSN coding, standards and a list of select areas for immediate action. To catapult the

Industry to the next level of growth, emphasis was laid on addressing concerns related to the soft bucket list of the industry including R&D, incentives, policies, talent development, building an enabling ecosystem.

TRANSMISSION LINE

India's transmission segment has undergone immense transformation, making India the second largest in the world in transmission systems. CII Transmission Division continued its efforts to create systems, structures and infrastructure for transmission & distribution and to encourage efficient and intelligent power transmissions. To support the growth of transmission sector, focus was on new infrastructure build up programmes for transmission projects, streamlining GST provisions, easing the execution and procedural bottlenecks of important schemes and processes for ROW, forest clearances and indigenization for offshore wind related T&D infrastructure. Supporting the Industry by launching additional export initiatives and building competitiveness was advocated for the year. The opportunities and technology drivers of the emerging transmission landscape were discussed at the Conference on Transmission Lines held along with Power Grid Corporation of India Ltd. A report on Transmission Lines providing insights into the state of play, key Government interventions, opportunities and way forward in the sector, was released.

VALVES & AUTOMATION

Valves manufacturing is significant to projecting India's capability as a strong capital goods manufacturing destination. The Indian industrial valves industry is expected to witness a CAGR of around 5.9% between 2018 and 2023. India's valves services market is also experiencing growth with an expected CAGR of around 8% between 2018 and 2023. CII Valves & Automation Division continued to advocate for domestic demand creation as well as for standards, skilling and safety in Indian valve manufacturing. In addition, the sector was encouraged to tap the emerging valve services and automation opportunity. The Valves Conference as well as the report focused on 'Building Brand India' laid out the opportunities, challenges and the way forward.

ASSOCIATIONS' COUNCIL

CII Associations Council (ASCON) is an important forum that brings together close to 104 national level sectoral associations on a common platform. During the year, ASCON regularly reviewed Industry performance, deliberated on challenges impacting growth and the expected growth outlook. Based on deliberations with Council Members and other stakeholders, ASCON focused on policy advocacy and recommended steps necessary to support sectoral growth. ASCON quarterly reports and surveys provided key insights on Industry performance and growth outlook during the year.

Critical policy level issues raised by the sectoral associations, including GST related concerns, were actively taken up with the Government. In special interactions with senior Government officials, the Associations' queries on GST and budget expectations were highlighted. Various sectorial cases of Inverted Duty Structure (IDS) were brought to the notice of the Tariff Commission.

Given the increasing need to understand the possible impact of Regional Comprehensive Economic Partnership (RCEP), Mr Sudhanshu Pandey, Additional Secretary (Trade Policy Division), Ministry of Commerce & Industry, demystified key aspects of this regional partnership. At a special session, the ASCON Members

brainstormed on the sensitivities involved and a possible stance on Free Trade Agreements (FTAs) and RCEP.

The services sector ASCON Members came together at a Bureau of Indian Standards - Industry interaction to deliberate on the priority for standards development and implementation. During the year, senior officials of the Competition Commission of India engaged in discussions with Industry Members and ideas for improving Ease of Doing Business were shared with Department of Economic Affairs and DPIIT.

In pursuit of the policy advocacy drive and to provide value added service to the affiliate associations, a G2B webinar series was initiated. A team of experts led by Mr Yogendra Garg, Additional Director General, GST and Mr S K Rahman, Additional Director General (ADG) GST participated in the 1st such Webinar, live from the Directorate General of GST (DGGST), Central Board of Indirect Taxes & Customs (CBIC), Ministry of Finance.

To channelize Industry associations in the mission of building a New India and to celebrate and recognize their success and vital contributions to the development of the Industry, the first-ever 'Global Industry Associations' Summit' with the theme 'Agents of Change: Partners for Progress' was organised in New Delhi.



From L to R: Ajay Shankar, Former Secretary, DPIIT (formerly DIPP) and Former Chairman, Expert Committee on Regulatory Approvals; Subhash Chandra Garg, Secretary, Department of Economic Affairs, Ministry of Finance; Nikhil Sawhney, Co-Chairman, CII National Committee on Capital Goods & Engineering and Vice Chairman & MD, Triveni Turbine Ltd.; Ram Mohan Mishra, Additional Secretary & Development Commissioner, Ministry of MSME and Dr Vandana Kumar, Joint Secretary, DPIIT at the Global Industry Associations' Summit in New Delhi

INFRASTRUCTURE

The infrastructure sector is experiencing acute financial and operational stress, with credit availability drying up fast. While banks have assumed a cautious approach towards fresh funding, the problem of unresolved arbitration cases is adding to the liquidity crisis. A CII survey has revealed that India is faced with about US\$ 70 billion of annual infrastructure financing deficit. In addition, over 1.8 lakh cases are pending with six tribunals dealing with telecom, electricity, consumer disputes, taxes and environmental matters, locking up working capital.

In this backdrop, CII strategically engages stakeholders and works with policymakers as well as Government officials to facilitate infrastructure development & growth, enhance competitiveness and boost ease of doing business in India.

ADVOCACY

During the year, following areas were pursued with stakeholders:

- Incorporate a section on contract reset framework for both existing and new contracts, given the long-term nature of contracts
- Amendment of Section 10, clause 15 (iv) (h) of the IT Act to allow both public and private infrastructure companies to issue tradable zero coupon, long-term

tax-free infrastructure bonds based on a credit rating criteria

- Create a dedicated window for infrastructure (perhaps 10%) within the overall ceiling for Foreign Portfolio Investors in corporate bonds
- Frame stricter policy / criteria for time-bound internal assessments that need to be satisfied before awards sanctioned by the Government / concession authorities are challenged
- Expand institutional capacity by increasing the number of existing benches in commercial courts, as well as creating subject matter and stage-specific benches, wherever possible.

ACTION

The Government is considering some of the suggestions made in CII's detailed note on governance framework; dispute resolution and its efficacy; financing framework, and bidding strategy and judicial resolution submitted to Mr S C Garg, Secretary, Department of Economic Affairs, Ministry of Finance.

CONSTRUCTION

ADVOCACY

The challenges facing the construction Industry have continued to grow, especially with respect to liquidity, State Governments not adopting the CCEA guidelines, inequitable contract clauses and increasing number of legal cases. A recent CII survey, shared with the Ministry of Finance, found that cost implications towards legal and arbitration charges are significantly high at about 4-7% of the claim amount. The 'Prospectivity Provision' in the 2018 Amendment Bill has given a further setback to India's arbitration regime. It is a cause for concern for the construction sector, since large amounts of capital are locked in disputes. In this respect, representations were made to the Government seeking



From L to R: Soma Banerjee, Executive Director-Energy & Infrastructure, CII; Jayant Sinha, Minister of State for Civil Aviation and Ajay Singh, Chairman, CII National Committee on Civil Aviation and Chairman & MD, SpiceJet at the CEOs Roundtable on Aviation in New Delhi



From L to R: Sanjay Sethi, CEO, Maharashtra Industrial Development Corporation; Neel Raheja, Co-Chairman, CII National Committee on Real Estate and Housing and Group President, Raheja Corp; Prakash Mehta, Minister of Housing, Mining & Labour, Government of Maharashtra; P K Gupta, MD - Retail & Digital Banking, State Bank of India and Pravin Darade, Additional Metropolitan Commissioner - I & Project Director, MUTP, MMRDA at the Future of Investments in India's Real Estate Sector programme in Mumbai

an urgent provision for retrospective application of the Amendment Act, 2015.

ACTION

A detailed note, with an action plan to increase cash flows and productivity in the sector, emerged out of the discussions between Parliamentarians and Industry players at a CEOs Roundtable. Quick enforcement of contracts, easy recovery of monetary claims and effective dispute resolution mechanisms are some of the suggestions put forth during the Roundtable that sought to address challenges arising from conflicting policies and interests. Representatives of sectors such as roads & highways, construction, railways, real estate, technology and power shared their concerns with respect to the Prospectivity Provision in the 2018 Arbitration Amendment Bill and locked up capital.

SMART CITIES

ADVOCACY

As the pace of urbanisation has begun to exert increasing pressure on urban infrastructure, resources, and quality of urban life, the importance of smart and intelligent cities can hardly be undermined. CII is actively involved in intelligent urbanization, having signed independent MoUs with 16 cities and 10 country consortiums, the latest being with the Finland Consortium led by FINCHAM. The Swedish consortium's pre-feasibility study in the area surrounding Seva Nagar and Swedish Avenue in Pimpri, showcasing the Swedish expertise and solutions, is officially recognized as Sweden Nagar. The need to link availability of central

funds for urban projects under Smart City, AMRUT to raising own resources was also discussed during the year.

ACTION

Interactive sessions on Smart Cities, held in partnership with the Embassies of Israel and Finland, provided platforms for companies from the two countries to explore investment opportunities offered by India's Smart Cities segment.

REAL ESTATE & HOUSING

India's real estate & housing sector plays a vital role in the economic development of the country. Not only does the real estate sector spur economic activity in core sectors such as steel and cement but is also a source of employment generation. Estimates reveal that additional investment in this sector leads to approximately eight times employment through backward and forward linkages. Also a large recipient of FDI, this sector can be the harbinger of economic growth with strong support from the Government and existence of an enabling ecosystem. During the year, CII continued to engage with the line ministries viz Housing & Urban Affairs, Environment Forests & Climate change (MoEFCC), Commerce and Industry (MoCI) and Finance on several issues hampering the growth of this sector.

ADVOCACY

To give a fillip to the real estate & housing sector, CII National Committee on Real Estate made representations to the Government on issues related to the RERA Act, prospective provision of the proposed



Arbitration and Amendment Act, GST, project approval delays by environmental and pollution control boards.

The need for reducing the funding stress on project developers, amending Section 80IBA in respect of income from development of affordable housing projects and the issue of availability of high cost of land and clarity on approval systems to ensure the smooth implementation of affordable housing projects were impressed upon the Ministry of Housing and Urban Development (MoHUD).

ACTION

Promoting awareness, encouraging transparency and creating an increasingly secure environment for investors were the key agenda at the conference on 'Future of Investments in India's Real Estate Sector'. Various aspects of the real estate sector's investment climate were deliberated upon by about 250 delegates and 35 speakers.

CIVIL AVIATION

India's aviation sector has seen tremendous growth over the last one decade and has also seen a recent turnaround after experiencing turbulent times. Government policies and reforms have also been directed at giving a thrust to this sector. Yet the sector is unable to leverage its full potential, especially on the back of high ATF prices and operational costs. CII continued to work with the Government and regulatory agencies to help build a robust, investor-friendly and customer-focused aviation sector in India.

ADVOCACY

Even as the civil aviation industry consistently posted double-digit growth over the last few years, concerns over non-inclusion of ATF in GST have remained. Given that the VAT imposed by several States is considerably high, placing the airlines' bottomline under pressure, representations were made to Chief Ministers of the respective States for VAT reduction. Rationalization of taxes in line with international practices, to reduce ATF costs was also taken up with the Government.

India's Aircraft Maintenance and Repair sector is facing severe international competition. The 18% GST loaded

on the costs makes it highly uncompetitive. To help retain the MRO business within the country, it was recommended that at least for the next ten years, GST on all contracted/sub-contracted work be brought down to 0%, provided it was being undertaken in India.

ACTION

Importance of technology and its usage, lack of skilled aviation workforce, inadequate cargo facilities at airports, MRO Industry challenges, the need for a separate policy for catering and non-inclusion of ATF under GST were some of the topics that formed the discussion agenda of the CEOs Roundtable with Shri Jayant Sinha, Minister of State for Civil Aviation.

The session on 'Propelling Growth Through Aviation Led Services' was aimed at establishing an integrated ecosystem to drive growth of services in the civil aviation sector. During the discussions, Shri Jayant Sinha shared the Government's commitment to expanding airport capacity under NextGen Airports for Bharat Nirman (NABH), institutionalizing international safety inspection standards and training regulatory institutions on safety aspects. The Central Government is also under discussion with various State Governments. for activation of helipad operations within a given timeframe.

SHIPPING & PORTS

India's vast coastline network of 7500 km, combined with its strategic location along most major shipping highways, has placed the country's maritime sector in an advantageous position. While key Government initiatives such as the Sagarmala Project, ports modernization drive and inland waterways & coastal shipping development have unleashed a slew of opportunities, the sector is not without its bottlenecks.

ADVOCACY

The absence of a dispute resolution body in the maritime sector has meant that most contentious matters reach the courts, leading to delays and increasing costs due pending decisions. These have an adverse impact on the sector's overall financial viability. A suggestion was made to expand TAMP's role to include dispute / grievance resolution for the stakeholders specially related to Concession Agreements. Creating an institutional

mechanism for implementation of coastal economic zones, incentivising PSUs and private sectors to make a shift from road/rail to inland waterways, reducing bunkering costs by relaxing taxes, vessel compliance and manning requirements have the potential to create an enabling environment for the maritime sector. The Ministry is thus deliberating on CII's recommendations on these issues.

ACTION

The sub-groups on coastal shipping, trans-shipment hub, MCA & TAMP, inland waterways, container train operations and ship building & repair, led by sector experts charted the future course of action for the development of the maritime sector. An action plan for coastal shipping, inland waterways and trans-shipment hub, prepared in partnership with PwC, was shared with the Government. Some interventions suggested included maintenance of LAD, planning of terminal side infrastructure, need for private participation for dredging & terminal development, competitive tariffs and streamlining inter-terminal movement of transshipment boxes.

RAILWAYS

Over the last few years, Indian Railways (IR) have incurred substantial losses and posted high operating ratios, indicating precarious financial health. The CII

National Committee on Railways engaged with the Ministry of Railways on some key areas of work such as building last mile connectivity for ports, mines, industrial clusters through PPP route, setting up manufacturing units for rolling stock, building Private Freight Terminals (PFT), procurement of wagons, private operation of container trains and redevelopment of stations across the country, among others.

ADVOCACY

Ways to improve the ease of doing business with the railways and ensuring simplification of railways policy and governance were outlined in consultation with the Ministry of Railways and the Department for Promotion of Industry and Internal Trade (DPIIT) formerly DIPP. The idea is to encourage increased Industry engagement through innovative financing models. CII is closely working with the Ministry of Railways and DPIIT to suggest ways to improve the ease of doing business with the railways.

ACTION

Accumulation of Input Tax Credit (ITC) poses serious problems in case of units where the GST on input is 18%, while the final product supplied to railways is charged at 5%. The recommendations made by CII National Committee on Railways to address the resulting inverted duty structure & unutilized accumulated ITC are being considered favorably by the Government.



Members of Parliament at the CEOs Dialogue in New Delhi

DEFENCE & AEROSPACE

Ever since the Government of India began paving the way for a robust defence manufacturing sector, under the Make in India mission, the sector has experienced accelerated activity. Both India's private sector as well as foreign OEMs have evinced interest in India's defence manufacturing. CII took the lead in engaging with the Government and Defence Forces as well as the Indian Industry, to help bridge the gaps essential to building a vibrant domestic defence manufacturing sector. CII and the Society of Indian Defence Manufacturers (SIDM) sustained the advocacy efforts to create an environment conducive to the growth of the defence sector.

ADVOCACY

With a view to creating an enabling environment for the private sector, some far-reaching changes were advocated for defence policies. Some of these included simplification of MAKE II procedures, setting up trial & testing facilities and changes to rules related to public procurement policy for defence. An exclusive interaction of select CEOs with Shri Piyush Goyal, the then Minister of Finance and Smt Nirmala Sitharaman, Raksha Mantri reflected the growing commitment of the Government to energize 'Make in India' in the defence sector.

The recommendations based on interactions with Foreign Original Equipment Manufacturers (FOEMs)

and Indian Offset Partners (IOPs), were actively pursued with the Ministry of Defence (MoD) for inclusion in the revision of offsets policy. These include allowing online submission of claims supported by an end-to-end electronic system for management of offsets, possibility of outsourcing offset claim verification, time-bound verification of pending offset claims, possibility of offsets discharge against supply of machine tools and review of cap on discharge of offsets through services.

A detailed note on the Draft Defence Production Policy 2018 that delineated the Industry suggestions was shared with the MoD.

Finance and Taxation Policies

CII along with SIDM recommended lowering of GST for products being supplied to MoD, exemption of GST on import, jobbing and re-export projects and supplies from SEZs. The Ministry was requested to consider extending Letters of Credit to Indian vendors to overcome the issue of delayed payments.

Spectrum Allocation for Defence

Procurement of defence radar systems, fire control systems and radio sets involve development trials across the electromagnetic spectrum. The licensing authority for all spectrum allocation is Department



Nirmala Sitharaman, Raksha Mantri being felicitated by Shobana Kamineni, then President, CII, and Executive Vice Chairperson, Apollo Hospitals Enterprise Ltd along with Baba N Kalyani, Chairman, CII National Committee on Defence, President, SIDM & Chairman & MD, Bharat Forge Ltd in New Delhi



Subhash Bhamre, Minister of State for Defence and Jayant D Patil, Vice President, SIDM and Senior Executive Vice President (Defence Business), Whole Time Director & Member of the Board, Larsen & Toubro Ltd

of Telecom (DoT), while development trials are administered by the Department of Defence Production (DDP). To bring in a single window approach to development trials, it was suggested that the defence band licensing mandate be shifted to DDP.

ACTION

Technology Development

The efforts at supporting the Indian defence services endeavours to introduce new technologies continued during the year. The Army Technology Seminar, ARTECH 2018, organised jointly with the Army Design Bureau (ADB), and SIDM explored 'Technology as a Key Enabler to Overcome Challenges of Military Operation in High Altitude'. Technology infusion and indigenisation in the Indian Air Force, through the strategic partnership chapter and the simplified MAKE-II procedure, were discussed with the Industry. Industry support for capital and revenue, leveraging the potential of start-ups & incubators for defence R&D and product realization also found focus of the stakeholders. Officers from the three defence services shared their operational experiences and lessons learnt to give Industry and academia insights for developing high technology solutions.

Armed Forces – Industry Interaction

In an effort to encourage defence manufacturing in India, Industry players and the armed forces were brought together at a joint conference of the SIDM,

Centre for Air Power Studies (CAPS) and the Indian Air Force. At the Indian Army Make Seminar 2018, New Policy guidelines and project progress were communicated to the Industry. Some new projects were also unveiled on this occasion. Acquisition programme management, research & development, and operational capabilities of armoured vehicles were discussed to encourage defence cooperation and support to the Indian Armed Forces.

International Cooperation

International cooperation in defence was given a boost through meetings with heads of international defence organisations, Industry players and decision makers. Stakeholders introspected on the challenges impeding FDI in defence, despite 49% FDI being allowed through automatic route in the defence sector.

Business delegations from Russia interacted with Indian Industry at the 3rd India-Russia Military Industrial Conference, held on the side-lines of Defence Expo 2018. Cooperation with over 80 civil and defence aviation players from France was strengthened through a series of events held in partnership with the French Aerospace Industries Association (GIFAS).

Indian business delegations also explored opportunities in UK at the Farnborough Air show and in Russia through participation in the International Military Forum in Moscow.



General Bipin Rawat, UYSM, AVSM, YSM, SM, VSM, ADC, Chief of the Army Staff and Jayant D Patil at the ARTECH 2018 in New Delhi



Air Chief Marshal B S Dhanoa, PVSM, AVSM, YSM, VM, ADC, Chief of Air Staff of the Indian Air Force addressing the Seminar on Technology Infusion and Indigenisation Plans of the Indian Air Force in New Delhi

SPACE

India's space sector is amongst the fastest growing sectors, with the market potential pegged at around US\$ 300 million. ISRO's Polar Satellite Launch Vehicle (PSLV) has launched 275 satellites from 29 countries, about 70% of which belong to the mini & small satellites category. ISRO's PSLV, that already has orders amounting to INR 6.0 billion to be delivered till 2020, expects to receive more orders too. A larger participation of Indian Industry is required to meet the challenging demands of space based services. There exists an ardent need to improve the Indian industry's capabilities to enable them to make a headway in the global space business.

CII's National Committee on Space was thus constituted to empower the Indian Industry to harness the true potential of space technology.

The Committee is engaged in technology transfer for Indian Industry to design and manufacture small satellites and launch vehicles for the global space market. Action has been initiated for Indian Industry

to establish partnerships with Indian Space Research Organisation (ISRO) and Antrix for sensor technologies and sub-systems for electronic packages as well.

ACTION

The Bengaluru Space Expo (BSX 2018), an international exhibition on space technologies, satellites, launch vehicles and allied applications, was organised in association with the Indian Space Research Organisation (ISRO) and Antrix Corporation Ltd. The Expo, aimed at building a stronger and vibrant ecosystem for innovative space technologies in India, saw participation of 85 exhibitors and 600 delegates from eight countries. The three-day concurrent International Conference on Space Technology, 'World Space-Biz' had leaders from the global space agencies and Industry deliberate on various facets of space technologies and applications. In addition, efforts to give a boost to engagement of Indian SMEs in the space sector continued through out the year.



From L to R: Aman Choudhari, MD, Surin Automotive Pvt Ltd; Kris Gopalakrishnan, Past President, CII and Chairman, CII Start-Up Council, Chairman, Axilor Ventures; Dr K Sivan, Chairman, ISRO and Secretary, Department of Space; Jean Yves Le Gall, President, Centre National d'Etudes Spatiales (CNES) and Rakesh Sasibhushan, Chairman, CII National Committee on Space and Chairman, Antrix Corporation Ltd at the 6th Bengaluru Space Expo (BSX 2018) in Bengaluru

ENERGY

India's recent accelerated and exponential growth has led to a rapid increase in energy demand. To help the energy sector keep up with the growth demand, inputs were provided to the Government on key issues across the energy spectrum, ranging from GST reforms for hydrocarbons sector, encouraging competition in power, boosting domestic manufacturing in renewables and pushing for measures to enable renewable energy to move to the next growth trajectory.

POWER

ADVOCACY

A Voice of Customer study for the power sector was undertaken in partnership with AT Kearney. A market survey of over 3000 customers across segments such as agriculture, domestic, commercial and industrial consumers, provided insights on how factors such as price, quality and connectivity affect the end-consumer.

The recommendations on Amendments to the Tariff Policy included the adoption of a non-discriminatory approach to PSUs and the private sector. Suggestions to encourage market competition included approval of competitive tariffs. Incorporation of suitable provisions in the Tariff Policy, to ensure that power assets were

not stranded, was also requested. The Core Group on Transmission focused on how to integrate the transmission sector with the larger power sector, help it become more competitive and also how to implement international best practices.

While underscoring the stress of the power sector to Shri Piyush Goyal, Minister for Coal and Railways, recommendations were presented on issues such as supply allocation, linkage rationalization & ensuring better quality of coal and faster dispute resolution for infrastructure projects.

At two other meetings with Members of Parliament, the need for easing the stress on the power sector at the State level was emphasized. Encouraging cross-pollination of ideas and sharing of best practices amongst States was also advocated.

ACTION

The CEOs delegation to London, led by Shri R K Singh, Minister of State (I/C) for Power and New & Renewable Energy, discussed smart metering options and shared power sector opportunities in India. International stakeholders and investors were also sensitized about the investment potential of the smart meter market and the opportunities arising from India's energy transition.



R K Singh, Minister of State (I/C) for Power and New & Renewable Energy addressing the CEOs delegation in London. Also present at the Industry Roundtable on Smart Meters, Meter Asset Providers and Financiers: Archana Agrawal, Joint Secretary, Ministry of Power; Anand Kumar, Secretary, Ministry of New and Renewable Energy and Dr Arun Kumar Verma, Joint Secretary, Ministry of Power

RENEWABLES

ADVOCACY

The CII National Committee on Renewables worked closely with the Government around prioritizing policy reforms, mobilizing investments, boosting manufacturing, and promoting sustainable development goals. With a view to ensuring that the RE sector does not get caught in the web of non-performing assets like the power sector, several representations were made to the Government. While the need to remove the tariff cap on future bids to improve competitiveness was emphasised, introduction of an institutional arrangement, by which investors can be shielded from the uncertainties over bill payments by DISCOMS. A request was made to ensure a clear bidding plan for minimum 10 GW for both solar and wind to build Industry confidence to invest and enhance renewable power absorption in the existing grid by encouraging State DISCOMS to buy more renewable power.

Recommendation papers for 1st & 2nd generation biofuels, advanced biofuels, bio-CNG, services and municipal solid waste were prepared under the aegis of the Bioenergy Task Force. The recommendations, aligned with the Government's intention to build a comprehensive policy roadmap, ranged from ensuring regular & assured feedstock supply at an assured price band, Single Window Clearance for NOCs and fast tracking of environment clearances.

ACTION

The 2nd Global RE-Invest Conference, held under the aegis of the Ministry of New & Renewable Energy and the International Solar Alliance was an effort at promoting India's RE Sector globally. A Corporate Renewable Energy Procurement Roundtable, held parallel to Global RE-INVEST, took forward the dialogue on multi-state Renewable Energy Demand Enhancement Initiative under the partnership with WWF-India. At the REDE Business Days, Commercial and Industrial (C&I) consumers discussed the business case for increasing RE's share in their power mixes and participated in Central Government's stakeholder consultations with MNRE, IREDA and SECI. A partnership with Imperial College, London has also been forged to start an online executive education course on Corporate Renewable Energy Procurement.

A proposal on the way forward for the RE sector, submitted to Shri R K Singh, highlighted the need for developing a mechanism for Industry consultation before fixing a cap on projects, introduction of an institutional arrangement for investor protection from bill payment uncertainties and issuance of guidelines on the bidding process.

The Workshops on Powering Our Rooftops Solar, in partnership with Hero Future Energies, created awareness about the value chain and business models for industrial consumers. The phase II of these



From L to R: L R Venkatesh, Associate Expert-Solar, COCENA and Director, Vesat Solar System Pvt Ltd; C Narasimhan, President, Indian Solar Association and Chairman Raasi Group; M Ramesh, Chairman, CII Coimbatore Zonal Council and MD, Alphacraft Pvt Ltd and R Sunder, Head – Rooftop Solar, Hero Futures Energies Pvt Ltd at the CII-HFE Powering your Rooftops Workshop in Coimbatore

workshops aimed at accelerating adoption of RTS in Tier II and III cities, such as Coimbatore, Tripura, Aurangabad, Sricity and Greater Noida.

International Solar Alliance

The ISA Forums and Pavilions at the World Future Energy Summit in Abu Dhabi as well as the Intersolar Europe in Munich & UNFCCC CoP24 in Poland were organised in partnership with International Solar Alliance (ISA). Global platforms for wide-ranging stakeholder collaboration on solar energy, climate sustainability and economic development through clean energy deployment were also arranged under this partnership. The Founding Ceremony at the Rashtrapati Bhavan, presided over by Shri Narendra Modi, Prime Minister of India and the First General Assembly that brought together Heads of various States, international ministerial delegations, and global Industry leaders were held under the aegis of this collaboration. CII is the first-ever convener of ISA's International Committee of Chambers of Commerce & Business (ICCB), a global Industry-led Task Force working to ensure that the corporate sector finds a strong voice in ISA's activities.

MAKE IN INDIA-RENEWABLES

ADVOCACY

In 2018, Government of India's introduction of a two-year safeguard duty on solar panels and modules imported from China and Malaysia were big steps in the positive direction. The safeguard duties of 25% for the first year, 20% for first six months of the second year, and 15% for the remaining six months were in line with CII's recommendations presented to the line ministry and the PMO.



Dr Bertrand Piccard, Innovator and Chairman, Solar Impulse with Anand Kumar, Secretary, MNRE at the MNRE-CII Session on The Rise of Renewables in India: Emerging Challenges & Opportunities at UNFCCC CoP24 in Poland

ACTION

India has the potential to become a manufacturing as well as export hub for solar and wind component, if supported with an enabling policy framework. While the Government is taking steps to improve the environment for renewables manufacturers and developers, several policy level challenges continue to remain. Issues such as no clear sight of demand, nor a clarity in apportionment of RE in the T&D system are impacting growth. The Government has assured that issues such as increasing imports of cheaper Chinese components and low solar & wind bid-prices will be considered soon.

FUTURE MOBILITY

ADVOCACY

Five core groups were formed, under the aegis of the Task Force on Electric Vehicles, to advocate the Government's vision of developing clean, connected, affordable and congestion free mobility in India. Their recommendations covering the entire mobility value chain from manufacturing, charging infrastructure, shared mobility, battery storage to integration of e-mobility with renewables, were presented to the NITI Aayog.

ACTION

The Future Mobility Summit, organised as a run-up to NITI Aayog's MOVE Summit, was an opportunity for stakeholders to develop a roadmap for a comprehensive clean mobility ecosystem in India. Some recommendations presented during the Summit included allowing private investors to pool resources and reduce big investment risks through the consortium approach, creating a Technology Acquisition & Upgradation Fund and according priority lending status to EV financing.

HYDROCARBONS

ADVOCACY

Several discussions were held with Ministry of Finance, GST Council, State Finance Ministers (especially Assam, Andhra Pradesh, Gujarat and Tamil Nadu) and Finance Secretaries to push for the inclusion of oil and gas sector under the GST ambit. Regulations for building a gas hub in the country were discussed at length with the Petroleum and Natural Gas Regulatory Board (PNGRB).

FAST MOVING CONSUMER GOODS

The Fourth Industrial Revolution is transforming entire systems of production, distribution and consumption, creating opportunities for immense value creation. Consequently, the Fast Moving Consumer Goods (FMCG) sector, which is an important pivot of this system, is undergoing transformation and is poised to leap to the next growth trajectory. Being the 4th largest sector of the Indian economy, it is expected to grow at a CAGR of 27.86%, reaching a size of US\$ 103.70 billion by 2020 from US\$ 52.75 billion in 2017-18.

Emerging business models in FMCG, enabled by disruptive technologies, are a tremendous source of innovation. With consumer spending as an engine of economic activity, the emerging power of technology will act as a catalyst to create new economic opportunities. This apart, the burgeoning opportunities enabled by favorable demographics and income growth will further shape the future of consumption ushering major shifts in the consumer profile.

ADVOCACY

The CII National Committee on FMCG continued its endeavors for this sector's development. Further reforms in the sector were advocated through greater engagement with policy makers with a view to create an enabling policy environment that rests on a robust regulatory framework.

ACTION

Understanding the consumption dynamics and patterns, especially of the consumer of the future, are key to the FMCG sector's growth. The National FMCG Summit thus explored these aspects in the context of an increasingly polarizing, anti-globalization world. With an increasingly impatient new generation that holds changing notions of value the India consumption story is big. India is already one of the largest markets for FMCG and the real winners in this scenario will be those who will continuously delight consumers.



From L to R: Sudhir Sitapati, Co-Chairman, CII National Committee on FMCG and Executive Director, Foods & Refreshment, Hindustan Unilever Ltd; Nitin Paranjpe, President, Foods & Refreshment Division, Unilever; Bharat Puri, Chairman, CII National Committee on FMCG and MD, Pidilite Industries and Nikhil Prasad Ojha, Partner, Bain & Company at the CII National FMCG Summit in Mumbai

SERVICES

India's exports clocked in the highest growth over the last 6 years. Sector specific interventions, focused export promotion initiatives, greater transparency and quick resolution of issues led to an impressive export growth of 14.76% in 2017-18 (October-September) over the previous year.

The services sector is not only the dominant sector in India's GDP, but has also attracted substantial foreign investment, contributed significantly to exports as well as provided large-scale employment. India's services sector is spread across a variety of activities such as trade, hotels & restaurants, transport, storage & communication, financing, insurance, real estate, business services, community, social & personal services, and services associated with construction.

In view of the fact that India's merchandise trade deficit is largely offset by services exports, helping in achieving an overall trade balance and financing India's 'trade deficit', this sector has assumed greater economic significance. To sustain and enhance the growth of the

services sector in future and for India to emerge as a leader in the global services economy, it is imperative to build competitiveness around the sector. Analysts believe that India is likely to continue its economic growth at least for the next two to three decades. One of the key drivers of this growth will remain the services sector, dubbed as the 'sector of the current millennium'.

The Government of India has initiated a number of schemes, such as promoting digitalization, tourism & shipping related policies, to spur growth of the services sector. These coupled with policies, such as GST and FDI liberalization, have brightened the sector's growth prospects. CII, through its National Council on Services launched a series of domestic as well as international outreach programmes and policy advocacy efforts to promote the sector's growth.

ADVOCACY

Over the year, efforts were made to identify the key challenges facing the services sector and engaging



Ram Nath Kovind, President of India at the launch of the Champion Services Sector the Global Exhibition on Services 2018 in Mumbai. From L to R: Rita Teotia, then Commerce Secretary, Ministry of Commerce and Industry; Devendra Fadnavis, Chief Minister of Maharashtra; Savita Kovind, First Lady of India; Ram Nath Kovind; C Vidyasagar Rao, Governor of Maharashtra; Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation, and Rakesh Bharti Mittal, President, CII, and Vice Chairman, Bharti Enterprises



with policy makers to address these challenges. The key challenges identified include lack of standards and expansion of the services export basket.

The importance of building a robust standards framework and building quality systems, through a consultative process, was emphasized to the stakeholders. The role of standards in making the services sector more productive was also highlighted. Policy makers were encouraged to engage, motivate and incentivize the services industry to adopt international standards and maintain databases of the best Industry benchmarks in various services.

India's services exports are currently dominated by telecommunication, computers and information systems. Given that many other sectors also have export potential the Government has identified several sectors as champion sectors. These include IT & ITeS, tourism & hospitality, healthcare & wellness, transport & logistics services, accounting & finance, media & entertainment, legal, telecommunication, infrastructure & construction services, environmental services, banking financial services & insurance and education.

An export strategy for services, with well-defined focus areas, target markets as well as a medium term and long term action plan is being prepared. It was suggested that the Government consider a similar strategy for bi-lateral, multilateral trade negotiations for the services sector.

ACTION

The services sector drives the Indian economy in an inclusive and equitable manner, creating jobs, driving national growth and fostering exchange of ideas, knowledge and technology. Accounting for half of global trade in value-added terms, this sector also contributes significantly to trade in goods including, through supply chains and e-commerce. As a dynamic player in the global services sector, India has the potential to build its own brand for services exports, where it can be a dominant player.

The Global Exhibition on Services, organised along with the Department of Commerce, Ministry of Commerce and Industry, Government of Maharashtra and the Services Export Promotion Council (SEPC), thus synergized a vibrant exhibition of various services and conferences that are driving this agenda. This platform

has, over the years, helped India's services sector scale new heights in the global market place by showcasing the India Opportunity. In this light, a new brand identity for India's services sector was launched by President of India, Shri Ram Nath Kovind, at the GES. Government of India also showcased its commitment to drive services in India, by introducing a dedicated fund of INR 5000 crore approved by the Union Cabinet under the Chairmanship of Shri Narendra Modi, Prime Minister of India.

CII's participation in the WTO Public Forum in Geneva was led by Ms Shobana Kamineni, Immediate Past President, CII & Executive Vice Chairperson, Apollo Hospitals Enterprises Ltd. A parallel session on Technology Enabled Services Trade under the theme 'Trade 2030' explored the possibility of increasing linkages between technology and services trade. Policy makers, civil society representatives, business leaders and researchers deliberated on how to maximize benefits of trade and ensure the trading system is as inclusive. A MoU was signed with European Services Forum to promote the development of bilateral economic relations and explore business opportunities in trade & investments in the services sector.

FINANCIAL SECTOR

India's financial sector has seen rapid growth over the last few years, with the Government focusing on reforms and a growing economy based on strong fundamentals. To help create an enabling environment for the sector's development agenda, CII placed special emphasis on accelerating and sustaining growth of all its segments. During the year, the various CII National Committees in the Financial Sector, worked both on policy advocacy as well as creating platforms for relevant dialogues and discussions.

Insurance & Pensions

In the financial year 2018-19, the CII National Committee on Insurance & Pensions presented a slew of recommendations to Dr Subhash C Khuntia, Chairman, Insurance Regulatory & Development Authority of India (IRDAI) for his consideration.

ADVOCACY

Critical areas deliberated upon during the year included life insurance, reinsurance, innovation sandbox,



From L to R: Joydeep K Roy Partner and Leader, Insurance and Allied Businesses, PwC; Rajesh Sud, Co-Chairman, CII National Committee on Insurance and Pensions and MD & Vice Chairman, Max Life Insurance Co Ltd; Dr Subhash C Khuntia, Chairman, IRDAI and Sanjiv Bajaj, Chairman, CII National Committee on Insurance and Pensions and MD, Bajaj Finserv Ltd at the Insurance and Pensions Summit in Mumbai

standardisation of disclosures, risk management, social benefit & customer experience, agency distribution and data protection & sharing.

Suggestions towards building a robust insurance sector included encouraging Aadhar based KYC for non-life insurance sector and pending approval for Authentication User Agency (AUA). CII also made submissions on annuities market, data sharing, digitization of life & non-life insurance business, widening the investment horizons, mandatory life insurance for all Pradhan Mantri Awas Yojna loans. Detailed discussions were undertaken with Pension Fund Regulatory and Development Authority for developing a robust and sustainable annuities space in India, with active contribution from Life Insurance companies.

Many of CII recommendations on annuity products like Open Market Option (OMO), partial withdrawals, options of commutation were accepted by IRDAI in the attempt to bring increased flexibility to the annuitant and build parity between pension products of life insurance companies and NPS.

ACTION

At the 20th Insurance Summit, Chairman, IRDAI and Chairman, PFRDA shared their perspectives on the disruptions, adaptations and realignments in India's insurance & pensions sector. A CII-PwC Report, also focused on these aspects, was released at the Summit. During a closed door interaction with Chairman, IRDAI, Members highlighted the possible reforms to further strengthen the sector.



Ravi Shankar Prasad, Minister of Electronics & Information Technology and Law & Justice at the Financial Inclusion Summit in New Delhi. From L to R: P K Gupta, MD - Retail & Digital Banking, State Bank of India; Amitabh Kant, CEO, NITI Aayog and Dr Janmejjaya Sinha, Chairman, CII National Committee on Financial Inclusion & Digitization and Chairman, BCG India

Financial Inclusion

During the year, the National Committee on Financial Inclusion deliberated on ways to foster an enabling environment for aiding financial inclusion, with an increased focus on MSME Sector's digitization. Based on stakeholder engagements, recommendations were submitted to the Ministry of Electronics & Information Technology and other relevant regulators.

ACTION

The implications of technology stack for financial inclusion of MSMEs and the non-apparent opportunities for FinTech companies, were discussed at the Financial Inclusion Summit in the presence of Minister of Electronics & Information Technology and Law & Justice, Shri Ravi Shankar Prasad and Mr Amitabh Kant, Chief Executive Officer, NITI Aayog. The Summit highlighted how digitization could power inclusive growth.

Non-Banking Financial Companies

The Committee on Non Banking Finance Companies (NBFCs) constituted during the year, deliberated on measures that could help such companies achieve and sustain an upward growth trajectory.

ADVOCACY

Detailed representations were made to the Ministry of Finance (MoF) and Reserve Bank of India (RBI) on obtaining the Global AUA status for NBFCs. RBI asked for clarifications on CII's note on Enforcement and Recovery Rights for NBFCs requesting permission to exercise recovery rights under the SARFAESI Act for INR 1 lakh &



From L to R: Ajay Srinivasan, Chairman, CII National Committee on NBFCs and Chief Executive, Aditya Birla Capital Ltd; Uday Kotak, President-Designate, CII and MD & CEO, Kotak Mahindra Bank Ltd; Subhash Chandra Garg, Secretary, Department of Economic Affairs, Ministry of Finance; Chandrajit Banerjee, Director General, CII and Abhimanyu Munjal, Co-Chair, CII National Committee on NBFCs and Joint MD & CEO, Hero FinCorp Ltd at the National Conference on NBFCs in Mumbai

above. Recommendations on NBFCs getting access to Debt Recovery Tribunals, for speedy recovery of debts, are also under consideration by RBI.

Yet another note on importance of Aadhaar in the financial sector is being studied by RBI and the Unique Identification Authority of India. The representation highlighted that since NBFCs and insurance companies meet Supreme Court's proportionality test, they may be allowed Aadhaar linking to efficiently offer their services. These recommendations were also tabled in a closed-door policy roundtable with Mr Subhash Chandra Garg, Secretary, Department of Economic Affairs, Ministry of Finance.

In light of the NBFC turmoil CII, in consultation with Members, presented to MoF and RBI, short-term recommendations to revive the sector. While appreciating the report, RBI implemented suggestions on the need to encourage NBFCs to securitise their assets.

ACTION

Discussions at the National Conference on NBFCs revolved around the NBFCs' role in financing growth & financial inclusion. Apart from addressing delegates at the Conference, Mr Subhash Chandra Garg, in a closed door Roundtable, deliberated on key issues and possible solutions of the sector with Members.

Financial Markets

The National Committee on Financial Markets was constituted to explore and recommend measures to enable holistic development of the markets in India.

ADVOCACY

Deliberation on possible amendments to the Delisting Regulations were undertaken during two meetings with senior officials from Securities and Exchange Board of India (SEBI). Based on the representation on delisting regulations unrelated to IBC, SEBI agreed to invite CII to depose in front of its Primary Market Advisory Committee. Recommendations on rationalization & standardization of Know Your Customer (KYC) norms for the financial services sector were also submitted to policy makers during the year.

In yet another meeting with the Executive Director and other SEBI officials, trends in the primary markets were discussed. Representations were made on the amendment to Schedule 8 & 11 of the Transfer or Issue of Security by a Person Resident Outside India, Regulations 2017. Issues of sizing and other parameters, related to buy-back and AIFs being considered secured creditors under SARFAESI, were deliberated upon. The Working Group on Bond Currency Derivatives Nexus discussed ways to inter-connect the markets.

ACTION

Apart from a closed door policy Roundtable, with Chairman, SEBI, the Financial Markets Summit was an opportunity for the Industry to hear the Chairman's views on innovation and adoption of reforms for financial markets to finance growth. During the Summit, delegates also engaged in discussions on how to deepen alternative sources of capital and re-energise development of the commodities market in India. Leaders from the sector also shared their perspectives on the economic benefits to be derived by inter-connecting markets.



From L to R: Vishal Kampani, Co-Chairman, CII National Committee on Financial Markets and MD, JM Financial Ltd; Leo Puri, Chairman, CII National Committee on Financial Markets; Ajay Tyagi, Chairman, SEBI and Uday Kotak at the Financial Markets Summit in Mumbai

Private Equity and Venture Capital

In the backdrop of lack of funds/finances facing the Industry, a B2B connect series was organised to create a platform for companies to share their business ideas with Private Equity players. The Private Equity and Venture Capital (PEVC) Summit also explored the role of such funding in starting, building and scaling up businesses in India. The importance of alternative capital and how PE players can help in stressed asset management also found focus in the discussions.

FinTech

During the year, CII made efforts to create avenues to provide necessary regulatory and Industry support for FinTech companies to grow in India.

ADVOCACY

Financial market regulators (RBI, IRDAI, SEBI & PFRDA) gave their in-principle approval for participation in a simplified regulatory sandbox in the FinTech Hubs in Vizag and Mumbai.

ACTION

A Memorandum of Understanding (MoU) was signed with the Government of Andhra Pradesh for supporting Vizag FinTech Valley to nurture FinTech start-ups. CII will galvanise corporates, provide necessary resources and be the industry spokesperson in this effort. Quick progress will be ensured by working closely with policy makers including regulators. Discussions are underway with the Government of Maharashtra for collaboration for a similar FinTech Hub in Mumbai.

At the international level, CII held multiple discussions, with the Monetary Authority of Singapore (MAS) and City of London, to learn from their expertise and experience in developing FinTech companies in the respective countries.

MULTI NATIONAL CORPORATIONS

Presence of MNCs in India continues to be a positive factor for the economy. They have contributed to the development agenda of the country in numerous ways, including technology transfer, employment generation, tax revenue, skill development, amongst others.



From L to R: Sanjiv Mehta, Chairman, CII National Committee on MNCs and Chairman & MD, Hindustan Unilever Limited; Ramesh Abhishek, Secretary, DPIIT (formerly DIPP) and Chandrajit Banerjee, Director General, CII, releasing the report on MNCs in India, at the Conference on MNCs & India in New Delhi

With a view to further augment MNCs' contributions to the Indian economy, CII, under the aegis of its National Committee on MNCs, proactively supports the Central and State Governments in implementation of business-friendly reforms.

ACTION

In an endeavor to highlight the role and contribution of MNCs to the Indian economy, a Report on MNCs in India: Creating Mutual Value was prepared. The report highlights the key policy reforms introduced by the Government of India for foreign companies. It also identifies some major policy issues being faced by MNCs in India and offers suggestions to address them.

The National Conference on MNCs held in New Delhi, discussed the contribution of MNCs in key areas such as commercial and social development, besides suggesting measures for building an increasingly business-friendly environment for foreign companies.

RETAIL

As the world's 5th largest global destination in the retail space, India also boasts of one of the highest per capita retail store availability in the world. Over time, 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. The sector is experiencing exponential growth, with retail development not just in major cities and metros, but also in Tier-II and Tier-III cities. Healthy economic growth, changing demographic profile, increasing disposable



From L to R: Piyush Kumar Sinha, Professor- Retailing & Marketing, IIM-Ahmedabad; Rajneesh Mahajan, CEO, Inorbit Malls; Pushpa Bector, Executive Vice President and Head, DLF Shopping Malls; Pinikiranjan Mishra, Partner, National Leader-Retail & Consumer Products, Ernst & Young; Seema Agarwal, Vice President & Head of Retail Analytics, Manthan; Sadashiv Nayak, CEO, Big Bazaar and AJR Vasu, Executive Director-Sales Effectiveness, Nielsen South Asia at the 5th CII National Retail Summit 2018 in New Delhi

incomes, urbanisation, evolving consumer tastes and preferences are some of the other factors driving the organised retail market's growth in India.

In this backdrop, the CII National Committee on Retail facilitates growth and development of the sector by engaging with the Industry and connecting with the Government on critical issues. In this process, CII has highlighted the Industry's shared view on significant matters such as GST, improving ease of doing business to the policy makers.

ADVOCACY

Advocating further reforms in the sector, CII continued to work towards creating an enabling environment based on a robust standards ecosystem and a conformity assessment platform. The lack of a cohesive policy that covers the entire gamut of retail platforms was emphasized to the policy makers. The need for a strong and modern National Retail Policy and importance of a regulatory framework to govern the sector were thus highlighted to the Government.

Given that modernization will not only improve productivity, but also create employment opportunities this is a key area of intervention. While urging the Government to incentivize modernization, retail companies were also 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.

ACTION

Shri Suresh Prabhu, Minister for Commerce & Industry and Civil Aviation has highlighted India's potential to become a US\$ 5 trillion economy, with service and manufacturing sectors playing a key role. Retail is a key service sector with potential to contribute to this vision. Understanding the issues hindering the development of a robust ecosystem and unlocking sector's true potential were, therefore, the focus of discussions at the National Retail Summit. The lack of an overarching retail policy that governs all retail formats is one of the most significant challenges that needs urgent attention. The CII-AT Kearney report titled 'National Retail Policy: Now or Forever Late' thus provides a framework for such a policy. It served to trigger the very crucial dialogue on the policy framework that will take the retail sector to the next growth trajectory.

Another key action towards helping retail harness its potential is the preparation of guidelines for export policies, software development for ease of doing business and a logistics portal.

Going forward, to give a thrust to ease of doing business, CII will advocate the need for a cohesive policy that addresses licenses, approvals, labelling signage, safety, land acquisition and expansions. Interventions to enhance back-end infrastructure, payments mechanism, in-store operations and employee upskilling have been identified as priorities. A strong push to boost private and public-sector capital infusion in retail will continue.

MEDIA & ENTERTAINMENT

Identified as a champion sector by Government of India, the Indian Media & Entertainment (M&E) industry is experiencing significant transformation combined with exponential growth. Over the years, the CII National Committee on Media & Entertainment has launched a slew of initiatives to foster growth in this sector. Regular meetings with key stakeholders on critical policy issues, year-round conferences and events that advocate expansion of the M&E sector have played a pivotal role in steering the growth of the sector. M&E's potential to contribute towards GDP growth, export soft power, build socio-cultural empowerment and create jobs cannot be undermined.

ADVOCACY

CII National Committee on Media & Entertainment has driven its vision to create growth templates in all verticals of the sector and to bring it on a common platform through a series of policy advocacy efforts. Stakeholder views and concerns on critical matters such as GST, improving the ease of doing business, skill development, export of cultural goods were persistently taken up with policy makers.

A strong need for a National M&E Policy is the need of the hour, given that India's M&E sector is governed by multiple acts, regulations, licensing and regulatory bodies. CII continued to advocate for a 'feather-

light' touch content regulation centered on robust self-regulation. As media technologies converge rendering existing laws and regulations obsolete, a recommendation was made for the Government to set up a convergence commission to harmonize regulations on all entertainment formats.

Given the expectation that growth in infrastructure investments could make India the global M&E hub, the need for granting infrastructure status to M&E industry was further emphasized. Suggestions were made for enhancing ease of doing business in the sector by creating a robust online, time-based, single-window, transparent mechanism for granting permissions to channels, events, films and satellite bandwidth.

Though India has Audio Visual Co-Production treaties with 13 countries, in the last 15 years only a handful of films have been co-produced under these treaties. It was suggested that the Government set up a co-production fund to encourage independent filmmakers to initiate projects under these treaties. Extension of the co-production treaties to services where India has a competitive advantage such as audio visual services, post production and VFX was also advocated.

Amendments proposed to make the Cinematograph Act of 1952 more contemporary with the changing dynamics of the Indian and global cinema were pursued with the Government during the year.



Indian Media & Entertainment Delegation at the India Stand, TIFF led by Ashok Kumar R Parmar, Joint Secretary (Film), Ministry of Information & Broadcasting

Piracy threatens not only the M&E Sector but also impacts the Government's tax revenue. A dedicated centralized anti-piracy wing that helps Industry coordinate with law enforcement agencies and other ministries to ensure that piracy/ copyright theft are curtailed has thus been strongly suggested to the Government. CII is also advocating for a centralized multi-agency body to deal with IPR infringement.

Though Indian films earn about 75% revenue from distribution, the cinema screen density in the country is amongst the lowest in the world. To address this challenge, the Information and Broadcasting Ministry has been 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.

ACTION

CII continued its efforts to promote Indian Cinema and other M&E industry verticals at the International Film Festivals and other international platforms, to help India secure its rightful place in the global M&E landscape. Participation in the Berlinale/European Film Festival, February 2018 in association with Ministry of Information & Broadcasting (I&B) helped project Indian Cinema, promote shooting locales and film related services in India.

India's high level delegation at the European Film Market discussed the changing narrative of India cinema with foreign delegates during discussions held at the Indian Embassy, Berlin, EFM Buyers' Lounge and EFM Producers' Hub. The delegates expressed their keenness to engage, co-produce, shoot in Indian locales.

CII's 17th consecutive year at the Cannes Film Festival/Market in May 2018 gave a fillip to the Indian entertainment industry on the global front. The Opening Cocktails, hosted in partnership with the Cannes Film Festival, at the 15th edition of the Producers' Network and Industry Workshops saw participation of Ambassador Vinay Mohan Kwatra, Ambassador of India to France and India's Permanent Representative to UNESCO, Paris.

The first ever Indian M&E industry delegation to the Toronto International Film Festival (43rd edition), organised in partnership with the Ministry of I&B, was

led by Mr Ashok Kumar Parmar, Joint Secretary-Films, Ministry of I&B. The delegation discussed India-Canada Co-production Treaty, ways & the means to ensure better co-operation and refinement of the policy structure between the two countries with the National Film Board of Canada, Canadian Film Commissions, Locarno Film Festival and Cannes Film Festival, Canadian Heritage, Screen Australia, AusFilm, Canada Media Fund, Telefilm Canada and other stakeholders.

The Global Exhibition on Services 2018 in Mumbai, served as a platform for over 20 international M&E buyers as well as investors to meet Indian companies and for Indian post production companies to expand their global reach.

In a closed door CEOs Roundtable with Mr Amit Khare, Secretary, Ministry of Information and Broadcasting, the Secretary addressed the current issues and problems, while further advocating introduction of sectorial policies and regulation.

The 7th edition of the CII Big Picture Summit themed 'Changing Media and Entertainment Landscape – From Convergence to Transformation' addressed the M&E sector's issues and challenges. The Summit saw over 75 industry captains, policy makers, thought leaders and other stakeholders interact with about 250 delegates to create a roadmap for the sector's growth.

Shri Ravi Shankar Prasad, Minister for Electronics & IT and Law & Justice led the key Government officials in sharing their views and plans for the M&E sector's growth.

'One Consumer, Many Interactions', a CII-BCG report, released at the Summit, captures the changing media landscape where content, consumer and technology are wedded to each other.



From L to R: Sudhanshu Vats, Chairman, CII National Committee on Media & Entertainment and Group CEO & MD, Viacom 18 Media Pvt Ltd; Ravi Shankar Prasad, Minister for Electronics & IT and Law & Justice and Chandrajit Banerjee, Director General, CII at the CII Big Picture Summit 2018 in New Delhi

TOURISM & HOSPITALITY

The tourism and hospitality sector, that drives socio-economic growth, triggers infrastructure development and facilitates growth in other sectors, is integral to India's economy. Being a big employment generator, the sector has a multiplier effect on economic growth. The World Travel and Tourism Council (WTTC) Report 2018 has revealed that India's tourism sector accounts for 8% of employment generation and 5.8% of exports, while contributing 9.4% to the country's GDP. Globally, India ranked 8th in terms of absolute direct contribution by the travel & tourism sectors to the GDP (Source: UNWTO and IBEF 2018 Report).

In this backdrop, the CII National Committee on Tourism & Hospitality plays a catalytic role in promoting tourism and projecting its potential as a mainstream industry. Continuous engagement with policy makers facilitated a conducive policy environment to position India as a significant tourist destination on the world map and attracting more tourists from other countries. CII's work also concentrated on enhancing the sector's potential for inbound travel, attract foreign investments, facilitate skill development and employment generation.

ADVOCACY

CII continued to engage with the Government on various pertinent issues submitted to them in regards to the tourism and hospitality sector. Based on the suggestions on the impact of GST on tourism sector, the new guidelines include levying of GST on the actual tariff charged by hotels, rather than on the published tariff.

In addition to the recommendations that have translated into policy changes, the following are being favourably considered by policy makers:

GST Representations

Suggestions with respect to GST, submitted to the Government earlier, were pursued throughout the year. Some key suggestions pending Government consideration included, treating tourism services provided to foreign tourists as deemed exports making them eligible for GST exemption; applicability of GST on Supply of Tour Operators' Services (No ITC) and amendment to Place of Supply Rules and IGST Act for immovable property.

A very strong case was made for non-applicability of GST on outbound tours, specially because it leads to double taxation arising from the inability to recoup input tax costs incurred outside India. It was emphasized that under the GST principle of consumption-based tax, the Place of Supply Rules in relation to outbound travel & tours be amended, to consider the location of travel & tour and not the location of the service provider.

India's tourism sector is taxed at rates higher than the global tax rates, rendering it uncompetitive. It was therefore suggested that the GST on services of accommodation in hotels, including five-star hotels, inns & guest houses, may be reduced from 28% to 18%.

Other Recommendations

A strong case was made to the Ministry of Environment, Forest & Climate Change (MoEF&CC) and Ministry of



From L to R: Pronab Sarkar, President, IATO & MD, Swagatam Tours Pvt Ltd; Dilip Puri, Founder & CEO, Indian School of Hospitality; Dale Honeck, Senior Counsellor, WTO Trade in Services and Investment Division; Sudhanshu Pandey, Additional Secretary, Ministry of Commerce & Industry; Deep Kalra, Founder & CEO, Make My Trip; Suman Billa, Joint Secretary, Ministry of Tourism; Ritesh Agarwal, Co-Chairman, CII National Committee on Tourism & Hospitality and Founder, Oyo Rooms; Sabina Chopra, Chairperson & MD, All India Resort Development Association (AIRDA) & RCI India Pvt Ltd and Kapil Kaul, CEO-South Asia, CAPA South Asia at the 14th CII Annual Tourism Summit in New Delhi



Tourism (MoT) to formulate an Eco-Tourism Policy. A special CII Task Force has defined the contours of this policy based on stakeholder consultations, discussions, workshops and meetings with the two ministries and the Industry players. Inputs on the Policy Document on Ecotourism in Forest and Wildlife Areas have been endorsed by the Ministry of Tourism.

Based on a proposal submitted during the year, the Ministry is expected to revise the Coastal Regulation Zone (CRZ) guidelines in favour of the Industry.

India's medical tourism industry, worth US\$ 9 billion, accounts for about 20% of the global market. In a bid to give a boost to this industry, efforts were made to promote India in high value markets.

ACTION

Given the importance of the tourism sector to India's economy and its potential for employment generation, CII brought stakeholders together to deliberate on the opportunities and challenges facing this sector.

CII presented the Policy Dashboard on Tourism at the 14th Annual Tourism Summit : India a Destination for all Seasons and all Reasons, which saw participation from 6 countries. State Governments, Industry members, MoT and other allied Ministries also participated in the Summit, which was inaugurated by the Tourism Minister.

MoT also announced the revised guidelines for Home Stay Establishments and Bed & Breakfast Policies at the Summit. The Common Minimum National Standards are expected to guide the States in the adoption of these policies.

Several tourism focused activities were organised during the Global Exhibition on Services (GES). A Seminar on Buddhist Tourism – Beyond Boundaries: Culture, Connectivity, Infrastructure, a special conversation with Subhash Talekar of the Mumbai Dabbawalas and celebrity talks with Chefs Sanjeev Kapoor and Ajay Chopra were the highlights.

The global marine tourism market, which stood at US\$ 58900 million in 2018, is poised to achieve a size of US\$ 92800 million by the end of 2025. India with a long coastline, ports and beaches offers a host of opportunities for marine tourism. A conference to explore these opportunities was organised in Goa.

SENIOR CARE

According to the United Nations Population Fund's 'India Ageing Report – 2017', it is estimated that India's elderly population (>60 years) will stand at 300 million by 2050, accounting for almost 20% of the country's population. While this is a direct reflection of the positive strides made by India's healthcare sector, it also poses challenges of maintaining health, well-being and functional ability of the ageing population.

The rapidly changing demographics have resulted in a sharp rise in the demand for senior care services. Coupled with increased life expectancy and an increased global inclination towards nuclear families, there has been an acceleration in the growth of the senior care sector. Development of this crucial sector requires a multi-dimensional approach, addressing needs across socio-economic segments, clinical and non-clinical needs, and variations in urban-rural requirements.

CII recognizes the need to develop service providers to deliver on the country's responsibility to support seniors and provide senior care. Therefore, the Task Force on Senior Care was constituted in partnership with experts and industry players. The group brings together service providers from home care, clinical care, senior living, non-profit thought leaders as well as senior care operators who collectively represent the leadership in India's senior care sector.

ADVOCACY

Despite positive demographic growth drivers, focused efforts by Government and policy makers, exemplary work by leading institutions working with senior citizens, and recent growth of private sector involvement in various senior care formats, there is still headroom for this sector's development.

In this scenario, the necessary policy level action were captured in a report titled, 'Igniting Potential in Senior Care Services'. Some issues being taken up with policy makers include, recognizing senior care as a sector, enhancing human capital for the sector and developing a legal framework for setting up senior care facilities & their operations. Reducing the financial burden on senior citizens, their increased liquidity and capital allocation to both seniors as well as the senior care industry are critical factors for future growth.



Delegates at the CII India Networking Evening in Milan

ACTION

Concerns of old age go well beyond health and encompass other aspects of ageism such as income insecurity, living arrangement, feeling of redundancy and issues in inter-personal relationships. These issues were highlighted at the 1st Annual Senior Care Conclave. The need to introduce quality standards in old age homes/senior living facilities across the country was also emphasized to Industry players. During the year, stakeholders deliberated on developing an enhanced service delivery orientation in the sector.

LUXURY

India's luxury sector, a rapidly growing industry, is pegged at approximately US\$ 30 billion. The market encapsulates apparel, accessories, lifestyle, automobiles, gems & jewelry, real estate, food & beverages, etc.

The growth opportunity for the luxury sector in India lies in the rising disposable income of the young and aspiring middle class. The luxury sector, through the Make in India initiative, has demonstrated huge potential for employment generation too. However, there are many threats to this sector, including the rise of counterfeits and the lack of suitable infrastructure, amongst others.

CII's Core Group on Luxury endeavours to address various concerns and issues through Government initiatives such as Make in India, Digital India, Skill India and Ease of Doing Business, which are progressive steps in the right direction.

ACTION

CII, through its continuous efforts, aims to promote the Indian luxury sector, to greater heights and strive along with the industry and the Government, to secure India's rightful place in the global luxury landscape. The Core

Group on Luxury, comprising highly acclaimed individuals from the fashion and beauty sector, leather accessories, architecture, interior design and editors of the country's best fashion magazines, is working to help unleash this sector's growth potential.

During the year, luxury furniture buyers, interior designers, accessories manufacturers, joined CII's Luxury Business Delegation to the prestigious Salone del Mobile exhibition/fair in Milan.

At a Roundtable with Mr Lorenzo Angeloni, Ambassador of Italy to India and Ms Reenat Sandhu, Ambassador of India to Italy, the delegates discussed challenges faced by Indian furniture manufacturers and designers as well as trade opportunities between the two countries. Members also attended meetings with globally known Italian luxury brands. The delegates also visited the Fair at Salone del Mobile.

The India Night, jointly hosted by CII and Seetu Kohli Home, saw participation of about 80 international guests including Mr Charanjeet Singh, Consul General of India to Milan and Mr Lorenzo Angeloni.

ART & CULTURE

Art & Culture play a vital role in any nation's development, as they symbolize a set of shared attitudes, values, goals and practices. For a country as diverse as India, that embodies a variety of cultures, it is the right time to direct the spotlight on art & culture.

To facilitate growth of this nascent sector, CII has set up Task Force on Art & Culture with eminent individuals/



Tarana Sawhney, Chairperson, CII Task Force on Art & Culture, Advisory Board Member, Foundation of Indian Contemporary Art and Dr Mahesh Sharma, Minister of State for Culture (I/C) & Minister of State for Environment, Forest & Climate Change



institutions from the field of art, craft, and culture. The Task Force is driven by their passion to create an enabling ecosystem and placing India's art & culture on the global map.

ADVOCACY

The key challenges facing this sector were identified in a CII - PwC Report titled 'Transforming Urban India: Art & Culture to Play a Pivotal Role'. These include a lack of public private partnership, gaps in the interface with Ministry of Culture & its various arms and impediments to import and export of art.

The study also identified the enablers of economic growth driven by art and culture, including best practices followed by successful international & Indian cities and the challenges facing Indian cities in this regard. The Report also assesses the existing Government of India schemes & initiatives and shares the Industry viewpoint on this sector. The need for greater public and private sector investments and a roadmap to building sustainable cultural megacities have also been underscored by the Report.

ACTION

Based on the CII-PwC report, a three-pronged approach to realizing India's cultural prowess was defined - curating unique city identities, implementing place-making initiatives and ensuring a nurturing regulatory and tax ecosystem.

The 1st CII Seminar on Art & Culture, themed 'India's Soft Power: Art, Craft & Culture' was built around this three pronged approach to provide a framework for future action. Participation from the Ministry of Culture, as well the Industry, was very encouraging. The Task Force has agreed to pursue the following key recommendations that emerged from the deliberations:

- Set up an apex body comprising Government and Industry representatives, to address the challenges faced by the sector
- Encourage Industry investment in revitalizing and maintaining monuments, by giving appropriate visibility to them
- Collaborate with countries to learn from their conservation and restoration expertise
- Showcase and build Brand India at national and international platforms

- Curate festivals around heritage monuments to attract investments
- Improve the quality and programming of public institutions such as museums, and heritage monuments including exhibitions, expositions, talks and academic courses to increase revenue to the exchequer
- Explore the possibility of creating tourist attractions by developing cultural hubs concentrated on art, combined with attractions such as food and cultural walks.

DIGITAL TRANSFORMATION

Information & Communication Technology

Today, India stands at the cusp of transforming into a digital economy, with both public and private sector organisations considering digitalization as a growth enabler and a driving force in the competitive global landscape. Buoyed by demographics, globalization, and reforms, India's ICT infrastructure, despite the near-term teething issues, is expected to grow at a brisk pace over the next decade. The massive data generation and critical information management that accompanies digital transformation is also at its prime and the recent global attacks on data, have brought cyber security to the centrestage. In this backdrop, CII stepped up its efforts to enable organisations to improve their inclusive digital capabilities.

ADVOCACY

To contribute to creating an enabling ecosystem, a series of policy recommendations were made to the Government and extensive discussions were held on issues related to e-commerce, telecom, broadband, IT & ITeS and cyber security.

e-Commerce

Over the last decade, the increasing internet and smartphone penetration have given e-commerce a major fillip while transforming India's retail landscape. During the year, views and inputs of key stakeholders from the Indian e-Commerce Industry and the Government were thus collated for making recommendations on developing an appropriate e-Commerce policy framework for India.



From L to R: Ambassador Kanwal Sibal, Former Indian Foreign Secretary, Head of CII Delegation; Professor Joseph Klafter, President, Tel Aviv University; Ambassador Pavan Kapoor, Ambassador of India to Israel at the 4th India Cyber Security Mission to Israel at Tel Aviv University in Israel

Telecom and Broadband

Over the last two decades, India's telecom sector has set up a world class mobile network, with combined investments of over INR 9.2 lakh crores. Today, however, this sector is clocking in less than 1% return on investment and is experiencing one of its most disruptive phases. In this context, closed-door meetings and sessions were held with stakeholders to draw and submit recommendations to the Government on:

- Options for easing the telecom sector's financial stress
- Excluding telecom towers from the current GST provisions
- Policy for enhancing ease of doing business in the sector.

IT & ITeS

The Working Group on Data Protection Framework for India, formulated during the year, held a series of consultative meetings to collate Industry feedback on the Data Protection Bill and Report of Government constituted Srikrishna Committee.

Four independent working groups on IT in agriculture, healthcare, education and skill development were formed during the year. They engaged with CII Members, MeitY, respective ministries, premier institutes, domain experts and other stakeholders on implementing and enhancing use of AI in the four sectors.

Cyber Security

A cross disciplinary CII Task Force on PPP in Cyber Security was formed to understand the complex and evolving threats to India. The Task Force, with participation of technical and non-technical experts from domains such as criminology, law, commerce and psychology, is expected to help create a robust and secure cyber ecosystem in India. Other core-groups on PPP in Cyber Security, formed during the year, are focused on increasing R&D investments & technology development, data localization, developing skill & quality of human resources, defining standards, pushing for growth of indigenous Industry, developing state-of-the-art test labs and creating a robust legal framework.

ACTION

International Engagements

To facilitate techno-business partnerships around cyber security, CII leads an annual delegation to Tel Alviv, comprising of user companies, senior scientists, professors, bank officials, new age entrepreneurs and senior Government officials. In 2018, its 4th year, Ambassador Kanwal Sibal, Former Foreign Secretary to the Indian Government, led a 30-member delegation. An Indo-Israel Roundtable, held during this visit, explored collaboration opportunities. A Joint Steering Committee between CII and the Blavatnik Interdisciplinary Cyber Research Center, at Tel Aviv University (TAU), is also being formed to take forward cyber security initiatives.

Project Workshops

A research project was launched to study the role of digital platforms in creating a cross-border trade ecosystem in terms of regulatory framework, financing

ecosystem, and trade facilitation in the SAARC region. Promotion of e-Commerce linkages in the region was explored through a series of closed-door workshops with key stakeholders from the e-Commerce Industry, held in Bengaluru, Delhi, Dhaka, Kathmandu and Colombo.

Centre for Digital Transformation

Over the last decade, digital transformation has triggered a fundamental change in the way organisations will compete in the future. A Centre for Digital Transformation (CDT) was thus curated and launched in principal partnership with Tata Communications, and associate partnership with Dell EMC. With a mission to leverage the digital transformation movement, the Centre will guide the development of intelligence systems, by bringing in personal computing, helping organisations adopt the intelligent cloud and reinvent their productivity and business processes, thereby enhancing their effectiveness and enabling inclusive growth. The Centre, that aims to become an organisation of international repute that enables continuous betterment of organisations through digital transformation, held its first governing council meeting in November 2018, at the CDT Gurugram.

An International Cyber Security conference, focused on Cyber Resilience: Adaptive Line of Defense, was held to provide a platform for 360-degree exploration of cyber security and to facilitate development of a cyber resilient strategy. Held as part of the 4th edition of Global Exhibition on Services (GES), the conference

focused on issues of cyber resilience, impact of emerging technologies on cyber landscape and the cyber security challenges and solutions facing the banking, financial services and insurance sectors.

A report titled 'Broadband 2022 – Unlocking a Trillion-Dollar Digital Economy' was released at the CII Broadband Summit – 2018 'Future-Ready Broadband for all in India' by Ms Aruna Sundararajan, Chairperson, Telecom Commission and Secretary Telecom, Ministry of Communications, Government of India. The Report, an effort to continue policy advocacy for sustainable growth of telecom sector, reflects on the role of broadband connectivity and its multiplier effect on the larger ecosystem.

The Government e-marketplace (GeM), a state-of-the-art public procurement platform, introduces transparency, efficiency and speed in the public procurement process. It ensures cashless, paperless and contactless transactions, in line with Digital India initiative's objectives. To further this objective, the 2nd edition of the National Public Procurement Conclave, organised in partnership with GeM, highlighted the opportunities offered by Public Procurement to buyers/sellers and the Industry.



MoU signing between CII and Tata Communications for the Centre for Digital Transformation at CII Annual Meet 2018. From L to R: Sumeet Walia, Chief Sales and Marketing Officer, Tata Communications; Adesh Goyal, Chief Human Resource Officer, Tata Communications, Shobana Kamineni, then President, CII and Executive Vice Chairperson, Apollo Hospitals Enterprise Ltd; Suresh Prabhu, Minister of Commerce & Industry and Civil Aviation and Chandrajit Banerjee, Director General, CII

EDUCATION & INDUSTRY-ACADEMIA COLLABORATION

Education is key to national and social development; it forms the foundation of an improved Human Development Index. Better standards of education are known to result in better learning outcomes, improved productivity & efficiency, development of technology and an overall contribution to national development.

During the year, CII Education Council thus focused its efforts on quality improvement across levels, encompassing improvement in learning outcomes, faculty development, use of technology, adoption of new teaching & learning methods and strengthening collaboration between Industry & Academia. The other areas of focus included increasing R&D investment in academic institutions and providing a level playing field for credible private institutions and corporate schools. Employability of students, need for holistic education with emphasis on life skills and teacher training in accordance with latest trends were also advocated by the Council.

ADVOCACY

The education sector has been at the centerstage of policy and on-ground action for the past several years. CII also made recommendations to the Government on the

draft of the New Education Policy. Key recommendations were made on governance reforms for quality, adopting global best practices for improving the quality of regulation and integrating skill development in higher education amongst others.

ACTION

Amongst the several initiatives undertaken to bring the Industry-Academia closer together, a key initiative was the Education Summit, organised in partnership with the All India Council for Technical Education (AICTE) and the Ministry of Human Resource Development (MHRD). The 2018 edition deliberated on topics pertinent to both school and higher education, importance of enhancing investment in R&D as well as collaborative research between Industry and academia. The Summit, also supported by National Institute of Open Schooling, The United Nations International Children's Emergency Fund (UNICEF) and UNESCO-Mahatma Gandhi Institute of Education for Peace and Sustainable Development (MGIEP), discussed key challenges in improving learning outcomes and adopting digital pedagogies. A workshop on 'Innovation in Teaching Delivery' for teachers, counselling sessions for students, case studies of corporate schools such as Bharati Foundation and Shiv Nadar Schools, as well as of private universities including Amity and BML Munjal University provided a holistic perspective on India's education framework.



From L to R: Dr B V R Mohan Reddy, Co-Chair, CII Education Council & Executive Chairman, Cyient; Prof Anil Dattatraya Sahasrabudhe, Chairman, All India Council for Technical Education; R Subrahmanyam, Secretary, Higher Education, MHRD; Sunil Kant Munjal, Past President, CII, Chairman, CII Education Council & Chairman, Hero Enterprise and Dr Pankaj Mittal, Additional Secretary, University Grants Commission at the Education Summit in New Delhi

The 7th Edition of the AICTE – CII Survey of Industry Linked Technical Institutes 2018, released at the Summit, provides a detailed analysis of the depth of Industry - Institute linkages across six parameters – governance, curriculum, faculty, infrastructure, services and placements. The survey showcases best practices followed by Industry partnerships across AICTE approved technical institutes in engineering, pharmacy, management and architecture. Based on the scores obtained in the Survey, the Report categorizes the institutes as Platinum, Gold and Silver. To encourage academic institutes to work closely with Industry the Awards, based on the results of this Survey, were also announced at the Summit.

The Prime Minister's Fellowship for Doctoral Research, a Public-Private Partnership (PPP) with Science & Engineering Research Board (SERB), Department of Science and Technology (DST), Government of India is offered to encourage Industry – Academia collaboration in R&D. The fellowship is aimed at attracting science and engineering talent for doctoral research, nurturing leadership qualities in scholars, providing exposure to international best practices & innovations and encouraging industrial research in academic institutions. Every year upto 100 new PM Fellow scholarships of INR 10.9 lakh per annum are granted with a 50% funding by the Government and the rest by a partner company. Granted for the first time in 2013, over 170 fellowships amounting to roughly INR 20 crore have been conferred with support of over 60 institutes and over 100 companies. In the past, PM Fellows have received 20

awards at prestigious platforms and filed six patents as a result of their research work under this scheme.

In 2012, the creation of a national-level picture of States' initiatives in higher education was conceptualized. Under this initiative the diverse regulations and schemes governing higher education in different States are mapped in an Annual Status of States in Higher Education (ASHE) Report. In its 7th edition now, the Report sources its data from the annual All India Survey of Higher Education (AISHE) conducted by the Ministry of Human Resource Development (MHRD). Prepared in partnership with Deloitte for the 6th year in a row, this report provides a macro view, alongwith a qualitative analysis, of the latest higher education trends in the country and future strategies.

DESIGN

Design, Innovation and growth are linked. Research has proven that businesses that use design innovate more often, more effectively and compete less on price. The importance of strategic use of design for competitive growth has been globally emphasized. Many Governments are developing and implementing design policies and programmes to boost competitiveness and increase awareness of design's ability to solve complex social issues such as public health, crime, energy saving, aging society. Several studies have also demonstrated the strong interrelationship between national competitiveness and design. Keenly aware of the power



Ramesh Abhishek, Secretary, DPIIT (formerly DIPP) at the 18th India Design Summit in New Delhi. From L to R: Prof Pradyumna Vyas, Director, National Institute of Design and Member Secretary, India Design Council; Ram Mohan Mishra, Additional Secretary and Development Commissioner, Ministry of Micro, Small & Medium Enterprises; Dr Naushad Forbes, Past President, CII, President, India Design Council and Co-Chairman, Forbes Marshall; Udayant Malhoutra, Chairman, CII National Committee in Design and CEO & MD, Dynamic Technologies Limited; Priya Paul, Chairperson, Apeejay Surrendra Park Hotels Ltd and Prof Anant Chakradeo, Dean, MIT Institute of Design at the India Design Summit in New Delhi



Winners of CII Design Excellence Awards 2018 at the India Design Summit in New Delhi

of design, the CII National Committee on Design, has over the last two decades, promoted design as a tool for improving competitiveness, both at the Industry as well as national level. The Committee also addresses the challenges encountered by industry in the pursuit of design for competitiveness.

ADVOCACY

The 18th Design Summit, organised in collaboration with the Department for Promotion of Industry and Internal Trade (DPIIT) formerly DIPP, National Institute of Design and India Design Council, brought together best of Indian and international design thinkers, practitioners and design users. The Summit has become a platform to create an enduring partnership between design and organisations, leading to innovation and increased economic competitiveness.

Based on the theme 'Design for Industry 4.0', the Summit addressed the new level of human-machine interaction, new design experiences, new scenarios of consumer-manufacturer-customer cycles, mass customisation, personalised products and services, virtual design solutions, intelligent and agile production systems and similar emerging possibilities. Design gurus and practitioners deliberated upon how design could assist Industry in taking the leap into the

next generation manufacturing capabilities.

The 4th edition of the annual India Design Book 2017-18 was also released at the Summit. This Design Book, a comprehensive compilation of products and services designed in India, is a celebration of the best in the Indian design space.

The Design Excellence Awards, initiated in 2011, to evangelize design in Indian Industry, are an acknowledgement of innovation and originality of Indian design. Celebrating the very best of Indian Design and endorsed by the India Design Council, these Awards seek to demonstrate the value of design to the Indian industry and also to encourage the emerging designers.

This year, 22 designs including those in visual communication, industrial, interaction and mobility, were chosen for the awards from a large number of applicants from across the country.

A proposal for setting up a world class facility in design was submitted to the Government of India, along with the India Design Council. This Design Centre has been conceptualized as a centre that specializes in product design, visual communication design, UX/UI design, service design and public spaces/ utilities design, among other areas of design.

HEALTH & LIFE SCIENCES

HEALTHCARE

The announcement of Ayushman Bharat (AB-PMJAY) by Shri Narendra Modi, Prime Minister of India, has made affordability and access to healthcare services a national aspiration. This initiative will not only provide millions of Indians financial security, but will also help release their funds for investment in assets such as education. The scheme is opportune for India in the backdrop of the significant mortality and morbidity rates, resulting from the double disease burden of Non-Communicable Diseases (NCDs) & Communicable Diseases (CDs).

India's private healthcare sector has lauded the Government for concretising the aspiration of accessible, quality healthcare for one of the largest populations in the world. Along with the public healthcare service providers, private sector healthcare players will be an integral part of delivering services under AB-PMJAY. The new environment is conducive to triggering novel innovations, digital disruptions and unique inter & intra industry collaborations for the world to learn from.

The CII Healthcare Council works to create value for India's healthcare sector by increasing sustainable interactions with Governments, both at the Centre and at the State-level and for catalysing increased

stakeholder engagements towards improved patient care and health for all.

ADVOCACY

Recommendations to the Government to strengthen and improve affordability and accessibility to healthcare services included:

- Detailed representation on GST were shared with the Finance Minister as part of the submissions to the GST Council. This was a representation seeking a review of the current 'exempt' category of healthcare. The representation is to consider making this zero rated/ or 5% for the Industry Members to avail the input tax credit
- The Provider recommendations submitted to NITI Aayog propose incorporation of short training packages, Continuing Nursing Education (CNEs), virtual learning programmes, health & wellness centres and a national health protection scheme into the Auxiliary Nurse Midwife (ANM) curriculum for skilling and training of workforce. Career progression pathways for nursing staff in the public healthcare system was also suggested
- A representation on 'Reducing the Cost of Doing Business for Private Healthcare Providers' included



Arun Jaitley, Minister of Finance and Corporate Affairs, Government of India at the 15th CII Health Summit 2018 in New Delhi

recommendations on GST on healthcare, reuse of single use devices, developing comprehensive package prices of procedures, incentivising medical value travel and leveraging healthcare's infrastructure status.

ACTION

The AB-PMJAY has potential to create a unique healthcare delivery model with world class outcomes, provided the private and public sector efforts are synchronized. As a first step towards this vision, CII Healthcare Council worked closely with the Government in encouraging private healthcare provider participation in the AB-PMJAY. The State Roundtables with private providers & the NITI Aayog, conducted in the run up to its launch, were an important breakthrough for the awareness and sensitization workshops and helped develop the contours of the Scheme.

A scientific study on pricing of various procedures in consultation with private providers and the Indian Medical Association (IMA) is underway. These multi-stakeholder consultations will help develop a scientific basis for pricing of procedures and align these to the AB-PMJAY rates with the objective to catalyze stronger private sector participation and help realise the Government's aspiration of making health a fundamental right of Indians.

As India enters an exciting new phase in Healthcare delivery, especially with the AB-PMJAY, it is essential to address both, the opportunities and the challenges. Efforts have to be directed at developing a long term

sustainable international model that encourages adoption of advanced technologies, develops a skilled workforce and builds the ability to fund research & innovation. In this context, the 15th Health Summit themed 'Indian Healthcare – A Changing Paradigm', provided a platform for senior policymakers, global healthcare experts, industry leaders, investors, start-ups & entrepreneurs to deliberate upon the evolution of India's healthcare sector into an international phenomenon, with a new, dynamic and responsive format. Faculty members of the Harvard T. H. Chan School of Public Health, the Summit partners, stimulated conversations around healthcare of the future.

The Report 'Ayushman Bharat – Creating a New Ecosystem to Provide Universal Health Coverage', released at the Summit, highlights the need for all healthcare delivery verticals to coordinate their efforts in making Ayushman Bharat a success.

Going forward CII's State Offices will work with the HSSC to address the critical skilled workforce deficit in the healthcare sector.

MEDICAL TECHNOLOGY

Government of India has identified Medical Technology as a sunrise sector with potential for exponential growth. Plans to develop R&D and innovation infrastructure, proposed positive amendments to the governance & regulatory regime and bringing affordable medical devices are steps in the right direction. CII strives to catalyse the recognition of the contribution the



From L to R: Prabal Chakraborty, Co-Chairman, CII Medical Technology Division and Vice President & MD, Boston Scientific India Pvt Ltd; Sudhanshu Pandey, Additional Secretary, Department of Commerce, Ministry of Commerce and Industry; Dr Naresh Trehan, Chairman, CII Healthcare Council and Chairman & MD, Medanta - The Medicity; Himanshu Baid, Chairman, CII Medical Technology Division and MD, Polymedica and Suresh Vazirani, Chairman & MD, Transasia BioMedicals Ltd at the 11th CII Medical Technology Conference in New Delhi



medical technology sector makes to healthcare delivery improvement in India and to facilitate its growth through policies and promotion measures.

ADVOCACY

CII endeavored to facilitate the creation of transparent, globally harmonized regulations appropriate for the medical devices sector. With this objective, a representation was submitted to the Ministry of Environment and Forests with respect to Hazardous and Other Wastes (Management and Transboundary Movement) Rules, 2015 & Amendment Rules, 2016.

Interactions with policy makers including NITI Aayog, MoHFW, MoEF, CDSCO, NPPA and BIS provided insights into the Government's thinking on driving this sector's growth. These were combined with stakeholder consultations for responding to the draft guidelines for implementation of Public Procurement (Preference to Make in India) Order 2017 and the Personal Data Protection Bill. Comments on the Draft Medical Devices Policy were prepared in consultation with stakeholders including the DOP, MoHFW & DPIIT (formerly DIPP).

While continuing to advocate for a Medical Devices Act to bring the sector out of the ambit of the Drugs & Cosmetics Act 1940 & Rules 1945, a strong recommendation was also made to establish a National Medical Device Promotion Council under DPIIT. This was one of the key recommendations of the draft CII-PwC Report on Medical Devices Sector in India: Strategic Action Plan 2025. Suggestions on encouraging investments to promote domestic manufacturing and promote exports of medical devices are under consideration by the Government.

The issues and challenges related to the 2012 order related to MEITY's notification on Electronics and IT Goods (Requirement for Compulsory Registration order 2012) were taken up with the Ministry.

ACTION

A Joint Working Group was constituted to help bring greater transparency in interaction amongst the healthcare providers and Med Tech manufacturers. The working group has identified common pain points to be addressed to develop a robust medical technologies sector in India and work collaboratively in a Post Ayushman Bharat environment.

During the year, stakeholders engaged in meaningful deliberations on challenges and opportunities at various medical technologies platforms created by CII.

Mr Sudhanshu Pandey, Additional Secretary, Department of Commerce, Ministry of Commerce and Industry shared the Government's vision and plans for the sector at the 11th Medical Technology Conference. A study on the conference theme - A Decade of Government-Industry Partnership Road Traversed and Road Ahead was also released.

A CEOs interaction with healthcare providers led to the formation of a Joint Working Group comprising members from pharmaceuticals, medical technology, hospitals and health insurance. This group is studying how the newly created Ayushman Bharat environment can be approached collaboratively.

A Task Force constituted along with members from the Health Insurance sector explored Health Technology Assessment Procedures.

HEALTH INSURANCE

During the year, various interventions were launched to accelerate larger health insurance coverage through multi-stakeholder collaboration.

ADVOCACY

With the announcement of Ayushman Bharat, the need for improving insurance penetration and coverage has become paramount. As CII continued to engage with stakeholders, especially Industry and IRDAI, a unique public-private partnership approach has emerged. An interactive session with the IRDAI Chairman was followed by meetings with the regulatory authority's officials. Collaborative efforts are now underway to design standard vanilla schemes that are affordable, will provide for basic in-patient hospitalisation and cover out-patient consultation. A Task Force, constituted under IRDAI's guidance and leadership, is revising the draft Report on Sustainable Practices in Health Insurance.

A memorandum on the draft National Health Protection Scheme highlighted ways to make efficient and cost effective healthcare available to the targeted population.

- CII Constituted a Task Force to work on Proposing List of Common/ Standard Exclusions, in partnership



From L to R: Dr Satya Bhushan Aggarwal, Head - Public Health Consulting, IQVIA; Amitabh Dube, Country Head, Novartis Oncology; Dr Shubnum Singh, Director - Medical Education, Medical Research & Advisor - Healthcare Framework (MHC), and Chairman, Health Sector Skills Council; Dr Vinod Paul, Member, NITI Aayog; Anupriya Patel, Minister of State, Ministry of Health & Family Welfare; Preeti Sudan, Secretary, Ministry of Health & Family Welfare and Prof Ravi Mehrotra, Director, National Institute of Cancer Prevention and Research and Neerja Bhattia, Executive Director, CII at the Seminar on Women's Health in New Delhi

with IRDA. The recommendations on drafting the list of Common Exclusions across Insurance Companies was released at the 12th National Health Insurance Summit in 2018.

ACTION

Despite a pressing need for health insurance, it has not been very popular in India, given the lack of transparency in the products and a low level of risk awareness. In 2018-19, CII endeavored to address this challenge.

The 12th Health Insurance Summit deliberated on how opportunities triggered by the AB-NHPM could be leveraged to spur growth of the health insurance sector. Senior bureaucrats, policy makers, Industry leaders and experts came together to explore the exciting landscape being created by this Mission. Several aspects of the health insurance sector, documented during the year, were released at the Summit. These included the CII-PwC Report on Ayushman Bharat – National Health Protection Mission Providing Universal Health Coverage to 500 Million People and the Report on Sustainable Practices in Health Insurance. The draft report on List of Exclusions on Health Insurance was submitted to the IRDA Chairman at the Summit.

PUBLIC HEALTH

The overall Indian healthcare market stands at about US\$ 100 billion and is expected to grow to US\$ 280 billion by 2020, on the back of a rising population and increasing affordability. In line with this increase, the Government spending on public health is expected to rise through its disease-specific programmes, focus on

immunization and non-communicable diseases, and expenditure on healthcare infrastructure.

ADVOCACY

The emerging healthcare landscape in India necessitates private sector response to the public health challenges. CII works to catalyze private sector engagement to complement the existing public health systems & promote PPPs to strengthen these. Such unrelenting efforts and endeavors over the years, has made public health an important boardroom agenda along with expanding CII's footprint and work in non-communicable diseases interventions.

ACTION

The prevalence of breast cancer, the most common cancer amongst Indian women, is expected to rise from the current 25.8 per 100,000 women to 35 per 100,000 women in 2026, according to the Ministry of Health and Family Welfare (MoHFW). CII thus proactively engaged the industry in 'preventive health' through widespread awareness on the necessity of early diagnosis of breast cancer as well as cervical cancer.

A Whitepaper on Breast Cancer: Landscape in India presented to the MoHFW outlines recommendations on how India can improve breast cancer care. Some key suggestions being pursued, include incentivizing the private sector to upgrade existing healthcare infrastructure/create more screening centers; increasing trained manpower for screening, by involving frontline health workers, private players and NGOs and developing awareness campaigns for breast care and

women's health, in collaboration with local communities and by working with panchayats.

A first of its kind Seminar themed Women's Health Challenges, Access and Prevention provided further impetus to the attempts at improving the environment for Women's Health in the country.

Going forward, CII's forays in public health will be further strengthened by the MoU signed with the India Chapter of Harvard T H Chan School of Public Health.

AYURVEDA

CII continued to strive towards mainstreaming Ayurveda and integrating it into the healthcare delivery system. The Core Group on Ayurveda identified 10 focus areas to enable the ayurveda industry to achieve its true potential both nationally and internationally. These include ayurveda medical services, ayurveda wellbeing services, ayurveda in public health, exports/ international alliances, brand ayurveda, funding of ayurveda start-ups/ entrepreneurs, insurance & payers, scientific evidence (products & services), strategic HRD and sunrise sub-sectors (Foods, veterinary, agriculture & equipments).

These Task Forces are driving implementation of the findings of Vision 2020 Roadmap, the most noteworthy being a three-fold increase in the size of the sector.

ADVOCACY

Industry views on integrating ayurveda in to AB-PMJAY were shared during the first meeting of the 'Expert Committee to Develop the Concept Proposal for Inclusion of AYUSH Interventions in Ayushman Bharat'.

Inputs were also given on AYUSHgrid, a major Government project aligned to the Prime Minister's vision of 'Digital India'. This project aims to connect various hospitals and research labs to record case histories and observations to generate data on ayurveda's efficacy.

ACTION

A meeting of the 10 Taskforces framed the agenda for their work through the year. Based on their work, recommendations were made to the policy makers to help build a conducive environment for this sector's growth. Several of these issues were discussed at length during the 2nd Ayurveda Industry Conclave.

A report on the Ayurveda Industry Market Size, Strength and Way Forward estimated that this sector will grow at a CAGR of 16% over the next 5 years. The report concluded that the key to this growth lies in improved quality of raw material & products, human resource development, policy uniformity across States and creation of a robust body of evidence.



From L to R: Dr Nitin Agrawal, MD, Bliss Ayurveda; Vaidya Deendra Triguna, President All India Ayurvedic Congress; Dr Partap Chauhan, Chairman and MD, Jiva Ayurveda; Dr Vasant Lad, Director, The Ayurvedic Institute, USA and Arvind Varchaswi, MD, Sri Sri Tattva at the 2nd Ayurvedic Industry Conclave in New Delhi

PHARMACEUTICALS

Clocking in an impressive growth over the last two decades, the Indian pharmaceuticals sector, today accounts for about 2.4% of the global pharmaceuticals sector in value terms. The sector holds potential to achieve a turnover of US\$ 55 billion by 2020. In this backdrop, the Government of India has spearheaded a series of initiatives, in consultation with the pharmaceuticals sector, to tailor policies directed at spurring manufacturing and fostering research & innovation. CII plays an important role in driving the sector's growth agenda, by identifying key imperatives that facilitate growth and ensure delivery of affordable, quality and accessible healthcare.

ADVOCACY

Based on continuous Industry interaction, the CII National Committee on Pharmaceuticals submitted policy related suggestions to the Department of Pharmaceuticals, NPPA, NITI Aayog, and the Ministry of Commerce. Recommendations were made with respect to the New Drugs and Clinical Trials Rules, 2018- GSR 104(E), Consolidated Foreign Direct Investment Policy Circular of 2017 pertaining to pharmaceuticals industry and the partially revised format for application of new drugs under Para 2(u) of DPCO, 2013, NLEM and DPCO. The issues faced by the pharmaceuticals industry in markets such as Russia, Belarus, US and Venezuela were also taken up with the Government. An actionable roadmap for Active Pharmaceutical Ingredients (APIs), prepared during the year, outlined key policy interventions and incentives expected from the Central

and the State Governments to make India future ready, with measurable matrices and clear delivery timelines. A sector level API Task Force was constituted to implement the recommendations.

ACTION

The 15th National Pharmaceutical Conclave, organised in collaboration with Department of Pharmaceuticals, NITI Aayog and Government organisations such as CSIR, DSIR and Invest India highlighted the challenges and strengths of India's pharmaceuticals landscape. Key Government officials, policymakers, researchers, academicians and thought leaders from the pharmaceuticals & healthcare sector shared their perspectives at the Conclave. Some key areas discussed included Ayushman Bharat as a new era in healthcare, regaining the lost glory of Indian bulk drug industry, targeted skill building, positioning India as a high quality global manufacturing hub and improving 'Ease of Doing Business' in the sector under the Make in India initiative.

In an Industry interaction, held parallel to the conclave, Dr R K Vats, Additional Secretary & Director General, Central Government Health Scheme and Chairman and Managing Director, HLL Lifecare and Dr S Eswara Reddy, Drugs Controller General of India, deliberated upon the involvement of pharmaceuticals and medical device Industry in AMRIT pharmacy. After signing a MoU with CDI (China Development Institute), a CII-CDI Roundtable brought together Industry leaders from the two countries to discuss opportunities for collaboration in pharmaceuticals and life sciences, with a special focus on APIs and generics.



From L to R: Srinivasa, Co-Chairman, CII National Committee on Pharmaceuticals and MD, Pfizer Healthcare India Pvt Ltd; Dr R K Vats, Additional Secretary & Director General, Central Government Health Scheme and Chairman & MD, HLL Lifecare Ltd; Satish Reddy, Member, CII National Committee on Pharmaceuticals and Chairman, Dr Reddy's Laboratories Ltd and Dr S Eswara Reddy, Drugs Controller General of India, Central Drugs Standard Control Organization at the 15th National Pharmaceutical Conclave in New Delhi

BIOTECHNOLOGY

Over the last five decades, India's biotech industry, a sunrise sector, has undergone significant transformation, scripting the country's global success story. Bolstered by increasing Government expenditure, supportive policies, rising exports, and a skilled workforce, the industry clocked in a turnover of approximately US\$ 11.6 billion in FY2017. CII National Committee on Biotechnology has directed its efforts in contributing to a bio-economy vision of US\$ 100 billion by 2025. The Committee has thus focused on helping 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

During the year, the CII National Committee on Biotechnology played a critical role in promoting the much-needed collaborative ecosystem with a focus on vaccines, biosimilars, bio-agriculture, diagnostics and genomics. Two position papers on vaccines, prepared based on inputs from Members, recommend removal of vaccines from the National List of Essential Medicines and abolition of the Purchase Preference Policy for Central PSUs. The recommendations made to the Government are aimed at motivating vaccine manufacturers to expand their retail market presence, increase R&D investments, build new manufacturing plants, expand capacity and encourage the Make-in-India programme.

An actionable roadmap for India's biotechnology and genomic sectors was also developed to identify mega pivots and growth levers that will unlock value and lead to decisive action with robust implementation. A comprehensive report on Indian Biosimilars Industry-Roadmap to Actualize Global Leadership was prepared in consultation with Members and Sathguru Consultants. The Report highlights major challenges for securing a sustainable future for India-made biosimilars. The suggestions cover critical elements on expanding size of domestic markets, simplifying access for Rest of the World markets, strengthening the upstream technology backbone and encouraging collaborations for regulated markets. The Report, released at the National Biotechnology Conclave, will be shared with the Ministry of Health and Department of Biotechnology.

ACTION

The 2nd CII National Biotechnology Conclave was held in collaboration with Department of Biotechnology, and other Government & institutional partners in New Delhi. Eminent speakers from Department of Biotechnology, Central Drugs Standard Control Organisation, BIRAC, China Development Institute, Life Sciences Sector Skill Development Council and senior leaders from biotech industry highlighted the growth areas in biotechnology including vaccines, biosimilars, bio-agriculture, precision medicines. They also discussed the importance of promoting ease of doing business in these areas.



From L to R: Dr Mahesh Bhalgat, Co-Chairman, CII National Committee on Biotechnology & Executive Director & COO, Shantha Biotechnics; Dr Alka Sharma, Advisor, Department of Biotechnology, Ministry of Science & Technology; Prof Samir K Brahmachari, Former Director General, Council of Scientific and Industrial Research; Dr Rajesh Jain, Chairman, CII National Committee on Biotechnology & MD, Panacea Biotech; Ranga Chandrasekhar, Deputy Drugs Controller, Central Drugs Standard Control Organization, Ministry of Health and Family Welfare at the 2nd National Biotechnology Conclave 2018 in New Delhi

MICRO, SMALL AND MEDIUM ENTERPRISES

Micro Small and Medium Enterprises (MSMEs) constitute a vital part of India's economic structure and is a vibrant sector nurturing entrepreneurial talent. The MSMEs contribute around 6.11% to India's GDP, 45% of the total exports and around 34% of manufacturing output. The Government of India has rolled out numerous initiatives and subsidies to propel the sector's growth from 12% to 15% per annum.

In 2018-19, the CII SME National Council continuously engaged with the Government on numerous issues hampering MSMEs' growth. Efforts were made to raise the competitiveness of Indian MSMEs, enhance productivity levels through adoption and dissemination of best practices, knowledge management systems and appropriate technologies.

ADVOCACY

Several position papers were prepared and recommendations made to the Government with respect to the Credit Linked Capital Subsidy Scheme (CLCSS), Sectoral Action Plan for boosting MSME exports, and GST related challenges. Easing of financing challenges for the MSME sector were pursued with the Ministry of Finance. Some of CII's recommendations accepted by the Government during the year includes:

- Subvention benefit on incremental and new loans and increase in pre and post shipment credits for GST registered MSMEs
- Based on the suggestion for lien marking in the accounts of PSUs/ PSEs to raise Purchase Orders, all CPSEs & Corporates with turnover more than INR 500 crore were directed to be on TReDS
- A notification has been issued making it mandatory for CPSEs to procure 25% from MSMEs instead of the existing 20% of their requirements. Of this, 3% is mandatorily to be procured from women entrepreneurs
- Simplifying the compliance by MSMEs, the Government issued a single Annual Common Form adhering to eight Labour Laws
- To ease the impact of inspections and simplify the process, inspection through random allotment has been approved, together with directions to inspectors to file their reports within 48 hours
- Creation of a single-window system for environment and other clearances for start-ups / new units / expansions
- An ordinance to simplify the levy of penalties for minor offences under Companies Act was formulated



From L to R: Giriraj Singh, Minister of MSMEs; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises; Dr Arun Kumar Panda, Secretary, Ministry of MSME; Shreekant Somany, Chairman, CII National MSME Council and CMD, Somany Ceramics Ltd and Alka Arora, Joint Secretary, Ministry of MSME at the 15th Global SME Business Summit 2018 in New Delhi

The Government is also deliberating on some pertinent recommendations that can help give a thrust to India's MSME sector.

Access to Credit

- The turnaround time (TAT) of requests for sanction/enhancement of limits for working capital/term loans to be clearly fixed, basis the product and amount of loans
- Requirement to return Bank Guarantees (BGs) to close claim period to be removed and the sanctity of the claim period as stated in the BG to be honoured
- Standardisation of the percentage of margin money for loans, capping of bank guarantees and accepting these as collateral or cash
- Alignment of the institutional credit system to the 'National Digitization-Drive', with digitization at each stage of credit procedure and documentation.

Exports

- Developing institutional arrangements and partnerships to access established practices, policies and latest technologies in developed countries
- State Governments to set up Export Promotion Zone for MSMEs
- Outlining and sharing with SMEs, the Standard Operating Procedures for enhanced safety and regulatory compliance
- Promoting a culture of quality by equipping MSME labs with adequate testing facilities and providing subsidies to quality conscious companies.

Procurement by PSUs and Large Companies

- Timely payment of invoices raised on PSUs and Government departments to address the liquidity and cash flow issues of MSMEs. A recommendation was made to the Government to devise a mechanism for immediate release of pending dues with all concerned Union Ministries
- Larger companies and PSUs should pay to MSME suppliers on priority and process their dues at a fast pace, to ensure that their working capital is not impacted
- To ease the liquidity pressure on MSMEs, RBI has been requested to allow banks to sanction Buyers' Credit facility on import of raw material or components under Letter of Credit (LC) by the bank.

FACILITATING MARKET LINKAGES

CII organises the National Vendor Development Programme (NVDP) to build long term supply relationships between Indian PSUs and MSMEs. The PSUs' product and service requirements, procurement policies and procedures, vendor registration processes, delivery terms, tender documentation, were explained to the MSMEs during the NVDPs. In 2018-19, the 5th NVDP was held in partnership with Ministry of MSME and NSIC, where more than 25 leading Indian PSUs engaged with close to 150 MSMEs (including over 60 SC/ST entrepreneurs).



From L to R: Nalin Kohli, Co-Chairman, CII National MSME Council and CMD, Araina Enterprises; Suresh Kumar, Additional CO, GeM; Ram Mohan Mishra, AS&DC, Ministry of MSME; Shreekant Somany and P Uday Kumar, Director (Planning and Marketing), NSIC, at the 5th National Vendor Development Programme in New Delhi

A series of specific Vendor Development Programmes for SC / ST entrepreneurs was organised across 10 cities in association with MoMSME in 2018-19. The objective was to help PSUs fulfill their mandatory procurement obligations under the Central Government Public Procurement Policy Order 2012, help stakeholders adopt applicable business practices and leverage the Stand-up India initiative. Industry experts and CSPSEs committed to mentor selected entrepreneurs with follow up meetings with procurement heads of PSEs/ OEMs and MSMEs.

PROMOTING COMPETITIVENESS AND CAPACITY BUILDING

For enhancing competitiveness of Indian MSMEs, several training programmes are organised every year in partnership with Association for Overseas Technical Cooperation and Sustainable Partnerships (AOTS) and Ministry of Economy, Trade and Industry (METI), Japan. The main objective is to support development of core human resources in India, promote technical cooperation and relations between India and Japan and enhance competitiveness through Management Training programmes on corporate, production, quality, logistics amongst others.

A Training on Production Management was conducted by a Japanese expert in Delhi and Bengaluru on Kaizen techniques, operational excellence and the ways to measure the impact of quality benefitting 80 participants. A 2-week Training Programme was held exclusively for CII Members in Tokyo, Japan. A Japanese Intern, under METI internship, worked at CII Head Quarters to study the healthcare industry in India.

The Defence & Aerospace Consultancy Services (DACs) bridges the information gap with respect to the Indian Industry's capabilities for defence manufacturing and guides MSMEs in identifying their existing and latent core competencies to help expand India's defence & aerospace manufacturing capacity. Two projects were completed by mapping the design, manufacturing, quality assurance and testing facilities of MSMEs and advising them on how to approach the Defence Procurement Procedures.

BUSINESS SUPPORT

CII SME Finance Facilitation Centre (FFC) and the CII SME Technology Facilitation Centre (TFC) continued to facilitate MSMEs' access to finance, insurance, credit rating, compliances and technology. The FFC reached out to over 4000 SMEs with 60 technical sessions



Finance Facilitation Centre Roadshow in Coimbatore

delivered along with partners. In 2018, Union Bank of India, Lakshmi Vilas Bank, Gats India Pvt Ltd, Mahindra Finance, DHFL, Aviva Life Insurance, HDFC Ergo and Care Ratings partnered FFC in its activities. Some of the best global and local technology companies such as WhatsApp, Microsoft, Vodafone, Tally, Hewlett-Packard, Indus Net, Secure Meters, CT Infotech and Tricolite Energy Solutions partnered the CII-SME TFC. Webinars conducted by both the centres with their respective partners, helped over 30,000 participants to learn about finance and technology. In 2018, the CII- FFC organised 9 roadshows and 5 webinars and the CII TFC organised 7 roadshows and 3 webinars, respectively.

A Regional Conference on MSME Financing themed 'Accelerating Economic Growth through Financial Inclusion for SC/ST Entrepreneurs-Road Ahead', was organised in New Delhi. The conference highlighted the financial challenges faced by the SC/ST Entrepreneurs and the steps taken by the Government and other stakeholders to boost the sector's growth, initiate dialogue for identifying various existing sources of financing, spreading awareness about exploring alternative sources of financing and regulatory mechanisms. The conference witnessed participation of over 700 delegates including senior officials from relevant ministries, regulatory and apex financial institutions, more than 20 leading banks, insurance agencies, venture capitalists, fintech companies and SC/ST entrepreneurs. In addition, a Loan Awareness Camp and B2B meetings were also organised.

PROMOTING MSMEs GLOBALLY

A CII-SME Delegation to Myanmar participated in the 5th edition of the Enterprise India Show at Myanmar. The delegation explored local markets for possible partnerships for manufacturing, joint ventures/ collaborations, market penetration and enhanced trade relations. Meetings with infrastructure developers, fuel management organisations, road contractors and mine operators found interest of participants at the show.

The 15th Global SME Summit, organised in partnership with the MoMSME, facilitated a congregation of about 350 SMEs from 25 countries. The Summit discussed the way forward on the concept of Global Value Chains, the latest technological innovation and how e-commerce can help boost global connectivity. The Summit saw over 50 speakers and panellists interact with over 500 delegates, of which more than 150 came from across 30 countries. Indian MSMEs met international participants through more than 100 B2B meetings at trade facilitation desks. The sessions focused on topics such as DIVE talks, plenary sessions and workshops on GVCs; e-commerce; technologies of the future such as IOT, 3D printing, digitisation, AI on financial analysis; countries' perspectives; GeM and others.

The CII SME Website and Newsletter were launched during the year to amplify specialised services for MSMEs Members and non-members.



CII Business Delegation with Ram Nath Kovind, President of India, at the 5th Enterprise India Show in Myanmar

PUBLIC SECTOR ENTERPRISES

India's Public Sector Enterprises (PSEs) have made stellar contributions to the country's economic growth with some having achieved international recognition, yet others requiring to make a paradigm shift by improving their competitiveness, productivity and transforming their operational processes. CII PSE Council, an apex forum of Public Sector CEOs, works towards strengthening PSEs through policy advocacy and stronger linkage with best-in-class private sector organisations and global majors. Efforts are aligned with various CII initiatives to bring the best to the PSEs.

ADVOCACY

Given the Government's concern with the loss making PSEs, transformation of these organisations was given paramount importance in 2018-19. A representation was also made to the Parliamentary Standing Committee on Loss making PSEs. A clear road map with well defined milestones was outlined in the Report on Transforming Loss Making PSEs. A decision tree model was presented for sectors that the Government should continue to operate in or exit out of, based on certain objectives.

In a joint session with SEBI and the Ministry of Corporate Affairs, meant to help improve corporate governance, a paper highlighting the points of divergence between SEBI Listing Obligations and Disclosure Requirements



Dr Madhukar Gupta, Additional Secretary, Department of Public Enterprises and Dr Anoop Kumar Mittal, CMD, NBCC at an Interactive Session in New Delhi

(LODR) 2015 & the Companies Act 2013 was tabled. The remedies for harmonizing these gaps were also highlighted in the paper.

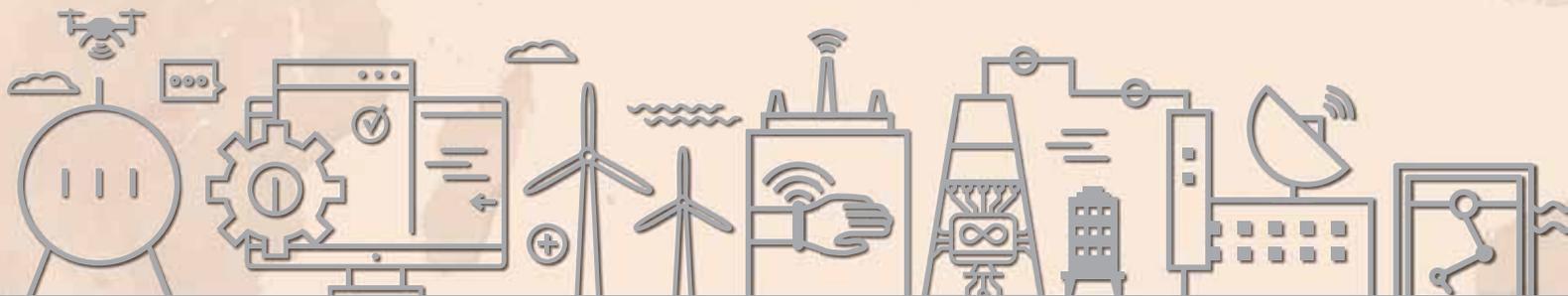
ACTION

Action was taken to enable PSEs to integrate better with global supply chain. The PSE Summit, held along with the Department of Public Enterprises showcased the PSEs' contribution in India@75. Private sector companies that have successfully integrated with global supply chains shared their experiences with the PSEs. A rapporteur, based on the deliberations, will be submitted to the President of India, the guardian of Indian PSEs.



From L to R: M E V Selvam, Company Secretary, ONGC; K V R Murty, Joint Secretary, Ministry of Corporate Affairs; Jayanta Jash, Chief General Manager, SEBI and I P Singh, Company Secretary, BHEL at the Interactive Session of Public Sectors with Ministry of Corporate Affairs and SEBI in New Delhi

CII IN THE REGIONS



- › Eastern Region
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- › North Eastern Region
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- › Northern Region
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- › Southern Region
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- › Western Region
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EASTERN REGION

India's Eastern region has, over the last few years, begun to emerge as a vibrant economic region. Various State Governments are rolling out policies to promote Industry and entrepreneurship. According to some estimates, the region has potential to account for 25% of India's GDP by the year 2035. To help the region unleash this potential, the CII Eastern Region (CII-ER) continued to drive the year's agenda based on the theme - Rebuild East, Invest in Development.

CII-ER displayed a firm resolution to play a significant part in accentuating robust and inclusive development across domains, and designed and implemented action plans accordingly. Implementable solutions to issues affecting businesses, were developed in close consultation with key stakeholders. To spur sustainable and inclusive growth in the region, the focus was on enhancing ease of doing business, skilling and capacity building to make the Industry increasingly competitive. Other areas of work included agriculture, IT & ITeS, innovation and start-ups.

ADVOCACY

During the year, CII-ER's advocacy efforts centred around simplification, synergy and inclusion driven through engagement with Chief Ministers, Ministers, Union

Ministers, Members of Parliament from the region and senior Government officials.

Several reports and studies on sectors such as power, IT, agri and food processing, industrial safety, banking and finance, logistics, CSR, amongst others, prepared during the year, provided insights on actions required to create an enabling ecosystem. Contribution to State-level policies was made through well deliberated policy recommendations and discussions aimed at creating a positive business environment and attracting increased investments in the respective States.

Some key representations submitted to the State Governments, Government agencies and policy makers are as follows:

Bihar

To improve the ease of doing business, suggestions were made for rationalisation of GST rates on key items in food processing and cold chain infrastructure and GST exemption for lease premium for mega food parks.

Chhattisgarh

A representation requesting further reduction of electricity duty, with a view to enhancing ease of doing



From L to R: Dinesh Agrawal, Executive Director, Godavari Power & Ispat Ltd; N P Mohapatra, Chief General Manager, NABARD Raipur; J Mukherjee, Chairman, Core Committee on Waste Management and MD, GP Green Energy Systems Pvt Ltd; Pramod Dubey, Mayor, Raipur Municipal Corporation; Ramesh Agrawal, MD, G R Mines & Minerals Ltd; Chandrika Chandrakar, Mayor, Durg Municipal Corporation and Ulhas Parlikar, Chairman, CII Waste Management Summit and Deputy Head, Geocycle India at the Conference on Sustainable Waste Management in Raipur



From L to R: Dharmendra Pradhan, Minister of Petroleum & Natural Gas and Skill Development & Entrepreneurship; Saraswati Prasad, Special Secretary and Financial Adviser, Ministry of Steel; Binoy Kumar, Secretary, Ministry of Steel; Chaudhary Birender Singh, Minister of Steel; Naveen Patnaik, Chief Minister of Odisha; Anant Gangaram Geete, Minister of Heavy Industry and Public Sector Enterprises; Dr Aruna Sharma, Former Secretary, Ministry of Steel and Chandrajit Banerjee, Director General, CII at the Conclave on Capital Goods for Steel Sector in Bhubaneswar

business, was accepted by the Government. Movement of goods of value upto INR 50000 under e-way bill have been exempted. The State Government is favourably considering Members' request for changes in the Town and Country Planning rules and regulations to help remove anomalies and facilitate smooth functioning of Industry in Chhattisgarh.

Jharkhand

The request for sufficient time (6 – 8 months) for implementation of the revised norm regarding maximum safe permissible Axle Weight for Transport Vehicles was approved by the Government. Representations for increasing the exemption limit of e-Way Bills and for notifying fixed term employment submitted to the Chief Minister are under consideration.

Odisha

It was suggested that the Government consider incentivizing real estate promoters to obtain IGBC – Green Certification. Apart from submitting a draft CSR SOP of the State, outcomes of consultative stakeholder dialogues were shared with the Government.

West Bengal

The issue related to a steep hike in the fees for fire clearance was raised with the Department of Fire and was resolved with the intervention of the State's Chief Minister. A notification was issued with respect to the transshipment allowance at Haldia Port on export and import of cargo to Bangladesh after the matter was taken up with the Commissioner of Customs, Kolkata.

In addition, based on CII's suggestions, the Kolkata Port Trust allowed direct port delivery for companies. The Government of West Bengal announced several land blocks dedicated to multi modal logistics parks. A notification was issued to resolve the immediate problems of tourist taxis plying between North Bengal and Sikkim arising out of the expiry of the reciprocal agreement between the two states.

Based on the deliberations at a Roundtable conducted along with ICSI IIP, the following suggestions were made on the Draft on Cross Border Insolvency to be introduced in the Insolvency and Bankruptcy Code, 2016:

- The expression 'domestic proceedings' be used instead of 'proceedings under the Code'
- The word 'reorganisation' as used in the definition of 'foreign proceeding' and 'foreign representative' should be supported with an explanation
- The word 'adequately protected' may be backed with guidelines
- Time period be defined in avoidance transactions.

ACTION

CII-ER created several platforms for stakeholder deliberations, encouraged action on sustainable economic growth & development and enhanced competitiveness with inclusivity. Through a series of initiatives, delivered in partnership with State Governments, the region's strengths and potential for business were showcased. The Patna Ideathon 2018, Krushi Odisha, North Bengal Conclave, Pravasi Bihari Diwas and the MSME Synergy provided effective platforms to achieve this objective.



Dr S Siddharth, Principal Secretary, Industries, Bihar, led a high-powered delegation to Jalandhar, Punjab, to invite manufacturers from Punjab to invest in Bihar. The Conclave on Capital Goods for Steel Sector: Manufacture in India, organised along with the Ministry of Steel, Government of India, saw senior Central and State-level ministers sharing their vision with delegates. Leading global capital goods producers inked 38 MoUs with Indian steel companies, envisaging reduction in imports of capital goods meant for steel sector, by promoting indigenous manufacturing of these goods.

The Global Mining Summit, held alongside the biennial International Mining and Machineries Exhibition in Kolkata, sensitized stakeholders on the potential and challenges of the mining sector. The region's metal and metallurgy sector was promoted through a focussed expo and conference in New Delhi.

One year of successful completion of GST was celebrated with sessions across the region.

MSMEs

Given that MSMEs are the fulcrum of any emerging economy, efforts were made to enhance their global competitiveness by promoting innovation, market linkages and resilience. While the CII Finance Facilitation Centres (FFC) continued to provide advisory and credit facilitation support to MSMEs, CII-ER created dedicated platforms to align all stakeholders.

The 2nd edition of MSME FinFest, brought banks, financial institutions, Government agencies, NBFCs and service providers together to showcase their support and various financing options available to MSMEs and start-ups. The FinFest saw around 140 B2B meetings being held between banks and participating SMEs. The Jharkhand MSME Conclave deliberated upon the sector's issues and challenges, with particular focus on enhancing competitiveness, financing options, and transformation through technology. At the seminar on MSME Financing & Technology Facilitation, the CII SME Finance Facilitation Centre and CII Technology Facilitation Centre updated MSMEs on the schemes of their partner banks and financial institutions. The Raipur SME TFC was launched during the seminar.

The MSME Conclave 2018, focused on public and private procurement, was a vendor development and B2B

platform, where PSUs and large corporates engaged with start-ups and MSMEs. The MSME Synergy, held in Siliguri and Gourbanga, addressed MSMEs' challenges such as electricity, taxation, land and also assisted the start-ups. At the 5th ICTE B2B linkage, 7 large and 32 small scale companies held over 220 pre-scheduled one-to-one meetings. Several MSMEs learnt about best practices during factory visits in Odisha and West Bengal.

Agriculture and Food Processing

Revitalizing the farm sector, educating farmers in the use of fertilizers, post-harvest technology, machines & equipment, doubling farmers' income and building a robust food processing industry dominated the actions in the region. Initiatives such as Krushi Odisha, Krishi Unnayan Mela, delivered along with the Government, strengthened the impact of dedicated tutorials on latest farming practices & methods and showcased the States' strengths in agriculture, farm equipment, emerging trends, techniques and markets. Efforts were made to bridge policy gaps and provide inputs for stronger market linkages to create a mechanism for achieving stronger backward and forward linkages from farm to fork. Maiden initiatives focused on the growing consumer demand for fishery and the concern surrounding production and delivery of safe, high quality products to the consumer, where different stakeholders such as fishermen, traders, exporters, fish feed and fish health product manufacturers deliberated on pertinent issues.

The Agribusiness Conclave on Emerging Business Opportunities in Agri-Business in Kolkata, organised in partnership with Small Farmers' Agribusiness Consortium, helped build awareness about opportunities, existing schemes and created market linkages amongst FPOs, State Governments, financial institutions and other stakeholders. Apart from the 18 FPOs displaying their products, they also held 10 B2B meetings with large retail chains such as Big Basket, Grofers, Aditya Birla More; corporates such as ITC, Keventer, IFB Agro and bankers such as UCO, UBI, Central Bank, SBI, ICICI, Allahabad Bank and Bandhan Bank.

Special Initiatives

CII-ER created a range of platforms for stakeholders to come together, deliberate, debate and also learn from the global best. Prof Kevin Lane Keller, a well



Visionaries' Roundtable on Reinventing Corporate Lending at the 11th Banking Colloquium in Kolkata

known Brand Expert, addressed more than 400 executives at the Brand Conclave 2018. Thirty new projects designed at CII Innovation Clubs, housed at 24 technical universities and colleges from the East, selected by a jury of senior Industry Members was the highlight of Innovation 2018 centred around the theme 'Innovate to Grow: The New Success Mantra'. In an attempt to support, handhold, incubate and mentor start-ups in Odisha, and also realize the vision to build an enabling environment and supporting ecosystem that can facilitate at least 1,000 start-ups in the next five years, the Innovation Club was launched in four leading campuses of Odisha at the Financing Innovation conference in Bhubaneswar. Technology, innovation and disruptions remained the focus of Manufacturing Excellence, Manufacturing Conclave and ICT East.

The other flagship conferences included Banking Colloquium, Infra East, Healthcare East, Nursing Conclave, Energy Conclave, Logistics Colloquium and InsureInd. Organised in partnership with the West Bengal Government, Destination East 2019 included 110 buyers from 43 countries.

Conferences on varied subjects such as sustainable waste management, sustainable real estate, green industry & green urbanization, Insolvency & Bankruptcy Code, defence linkage, rural marketing, managing electrical safety risks, 3P compensation management, analytics for HR and industrial relations, made significant impact on stakeholders. A safety orientation was built in the region with the Safety Symposium & Exposition, a conference on contractor safety & health management, workshops on managing electrical safety and managing

safety while working from a height and industrial safety missions. An Apprenticeship Connect Workshop, Rail Connect East, Mineral Wagon and a Family Business Workshop found focus of the region during the year.

Making Business Competitive

A series of workshops, held in association with the Indian Institute of Foreign Trade and the Indian Institute of Packaging, created awareness about the nuances and fine print of Free Trade Agreements (FTAs), Regional Trade Agreements (RTAs) and the need to package products in line with international standards to be more competitive in global and domestic markets.

Education and Skill Development

With a strong focus on enhancing Industry-academia collaboration for linking education to skilling, a range of activities were launched by CII. Some of these activities included - preparing a roadmap on interventions required by educational institutions in resource and curriculum development, promoting innovation & entrepreneurship, employability and skill enhancement. A Skill Conclave in Siliguri and a Skill Connect Roadshow in Kolkata helped achieve these objectives.

Making Students Future Ready, a project launched during the School Education Excellence Conclave, is helping build capacity for administrators, teachers and non-teaching staff to enable them to adapt to the changing environment and in turn build student capacity. Seven schools in West Bengal are on board for this project. Apart from a workshop on making schools safer & smarter, the conclave also deliberated on advanced



From L to R: B K Thakur, Director HR, Nalco; Bimal Mishra, CEO, RSB Metaltech Pvt Ltd; Seema Tiwari; Dr T K Chand, Chairman, Odisha State Council and CMD, Nalco; B K Mishra, Chairperson, Odisha Human Rights Commission and S S Upadhyay, Resident Director, Jindal Stainless Steel at the 1st CSR Conclave in Odisha

learnings, new classroom styles, overall student development and professional learnings.

Inclusive Growth

Corporate support was mobilized to create 51 model Anganwadi Centres across Kolkata. Dedicated to the most vulnerable groups, belonging to the poorest of poor families living in urban slums, these centres support impoverished children and their mothers. Along with UNICEF, Women and Child Development and Social Welfare Department of West Bengal, CII-ER provides nutritional supplements and ensures immunization of pregnant women and infants. Having impacted over 3,500 infants and pregnant mothers, this project has become a model of how to improve delivery of Integrated Child Development Services (ICDS) under Corporate CSR initiatives in PPP mode.

Awareness about health and wellbeing was created amongst employees for building a more engaged, healthy and motivated work force.

At the CSR Conclave in Odisha, around 50 CSR heads of national organisations joined hands with 40 implementing partners and eight district representatives, for the first time, to prepare a convergence action plan for the State.

The maiden Tribal Development Meet in Jharkhand, helped accelerate efforts to mainstream the tribal communities, with particular focus on skill development of youth, build market linkages for existing & potential

entrepreneurs, and build capacity of entrepreneurs from these communities. Shri Raghubar Das, Chief Minister of Jharkhand addressed close to 200 delegates, that included more than 140 tribal entrepreneurs.

Recognition Of Excellence

CII-ER acknowledged exemplary work and best practices in fields such as safety, health and environment, energy conservation, quality, supervisory and work-skills.

Indian Women Network

The Indian Women Network took up the causes of health and wellness, leadership and sexual harassment amongst others. Beside a panel discussion on Breaking the Glass Ceiling to commemorate the International Womens' Day, sessions on mental health, HR interventions that are required for handling sexual harassment cases in the IT & ITeS vertical, prevention of suicide, menstrual health, challenges faced by women in out-of-the-box professions, financial literacy and workshops on making workplaces safer for women marked the year. The IWN Jamshedpur chapter was launched with a session on women professionals.

Membership Engagements

CII-ER deepened Membership engagement with 5 Member Meets, 48 Roadshows, 10 induction sessions and one on one meetings with over 698 Members at their premises across the 5 States. The monthly e-newsletter apprised Members of various CII initiatives undertaken from time to time.

NORTH EASTERN REGION

India's North Eastern region, the country's connect to the world's South East Asian region, holds immense growth potential. Endowed with rich minerals and weather conditions conducive to horticulture, the region has begun to clock its growth since the Government stepped up its Act East Policy (earlier known as the Look East Policy). With focused advocacy, connections, initiatives and networking, CII North Eastern Region (CII NER), worked diligently to create a conducive business environment over the past one year. India RISE: Responsible. Inclusive. Sustainable. Entrepreneurial, CII's theme for the year, defined the tone and tenor of the initiatives and goals undertaken in the North East.

ADVOCACY

During the year, advocacy efforts were directed towards promoting synergy, ease of doing business and inclusion. Continued deliberations with Chief Ministers, Central and State-level ministers, Members of Parliament and policy makers helped build a vibrant economic and business environment.

Inputs for drafting new industrial policies for Assam and Tripura were shared with the respective State

Governments. Roundtables on the Bamboo Regulatory Regime and Transit Access of Bamboo, in Agartala, Aizawl and Dimapur, helped advocate the removal of bamboo from the forest products list. The resultant bill, permitting felling and transit of bamboo from non-forest areas, is likely to encourage investment in the sector.

Inputs and representations on the North East Hydrocarbon Vision 2030 were submitted to Secretary, Ministry of Petroleum and Natural Gas (MoPnG) and Director General, Hydrocarbons. A representation of the challenges related to land and ease of doing business was submitted to the Additional Chief Secretary (Revenue Department), Government of Assam based on deliberations of a delegation of 12 representatives of oil & gas PSEs with him.

A representation to the Central Board of Indirect Taxes and Customs on facilitating overland cross border trade flagged issues related to trade barriers applicable while exporting specific products from Tripura to Bangladesh. Requests were also made to expedite upgrade of LCS at Dawki into an Integrated Check Post (ICP) and upgrading at least one DGFT office with EDI facility.



From L to R: Chandra Mohan Patowary, Minister of Commerce & Industry, Government of Assam; Prof Jagdish Mukhi, Governor of Assam; C K Das, Member, CII NE Council and Abhijit Barooah, Co Chairman, CII NE Council and MD, Premier Cryogenics Ltd at the North East Farm and Food Tech in Guwahati

ACTION

Deliberations were facilitated amongst stakeholders and action towards sustainable economic growth and development of the North East was encouraged during the year. The region's theme was driven through initiatives, in association with the Ministry of Food Processing, Software Technology Parks of India, Assam Industrial Development Corporation, Department of Horticulture, Rubber Board, Rubber Skill Development Council, Mizoram State Entrepreneurship Development & Monitoring Committee.

CII NER also celebrated one year of successful completion of GST through sessions across the region.

Engaging with Government

Engagement with Ministers and policy makers in the North Eastern States formed a key part of the work during the year. CII NER while sharing the vision and focus areas, with the newly appointed Chief Ministers of the North Eastern States, reiterated the commitment to partner the Government in the region's development.

At the special session on India@75, a platform to co-create Vision North East, 2022, the Chief Ministers of Assam, Arunachal Pradesh and Nagaland and the Deputy Chief Minister of Tripura interacted with the Industry. While coming together as a team, the Governments of these States are urging the Industry to leverage the strengths of the region for the country's economic growth.



From L to R: Ravi Kapoor, Additional Chief Secretary, Industries & Commerce Department, Government of Assam; P K Sharma, Director (Operations), Oil India Ltd and S K Moitra, Conference Chairman & Director (Onshore), ONGC Ltd at the North East Oil & Gas Conclave 2018 in New Delhi

Hydrocarbons, Oil & Gas

The Stakeholder Consultation on Hydrocarbon Vision 2030, focused on the Assam basin, deliberated on the progress, identified challenges and suggestions for course correction to achieve the vision envisaged.

The 3rd edition of the North East Oil & Gas Conclave 2018 explored the path to moving towards a hydrocarbon based economy by accelerating the development momentum of the oil & gas sector. While discussing ways to sustain the growth trajectory in the hydrocarbon prosperous North East, policy level interventions were also deliberated upon. Latest trends in technology, performance & business models for augmenting and shaping the future of oil & gas besides issues affecting projects in the region, were the focus of discussions.



From L to R: Conrad Sangma, Chief Minister of Nagaland; Chandrajit Banerjee, Director General, CII; Arnab Goswami, MD & Editor-in-Chief, Republic TV; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises; Pema Khandu, Chief Minister of Arunachal Pradesh; Jishnu Dev Varma, Deputy Chief Minister of Tripura and Sarbananda Sonowal, Chief Minister of Assam at the India@75 Session: Inclusive and Sustainable Development of North East Region by 2022 in Guwahati



From L to R: K K Dwivedi, MD, Assam Industrial Development Corporation Ltd and Commissioner, Industries & Commerce, Government of Assam; Chandra Mohan Patowary; Dr Dharmendra Singh Gangwar, Additional Secretary, Ministry of Food Processing Industries; Jishnu Barua, Additional Chief Secretary, Power, Government of Assam, at the Assam Food Processing Conclave in Guwahati

Agri and Food Processing

Exposure to technology and services, creating linkages, building capacities of small & medium farmers, local entrepreneurs and Industry by connecting and exposing them to modern techniques and business models to attain commercial competencies are strategic for the region's growth. The North East Farm & Food Tech provided several opportunities to achieve these objectives. B2B sessions and a seminar on making food processing a successful venture in the North East was also organised.

Conclaves focused on Assam's food processing industry, pineapple, rubber and bamboo opened up vast opportunities for industrialists and buyers of these products. They were also a platform for experts, advisers, producers and buyers to share best practices

and learn from each other's experiences. A food safety training for caterers and bakers in Aizawl highlighted the need for food safety.

Other Initiatives

An outreach initiative fostered start-ups and entrepreneurship in the region, by highlighting the wide spectrum of opportunities and the enabling environment for innovation & entrepreneurship. Deliberations on the role of ICT in smart cities, infrastructure & human resource and making North East a start-up destination were facilitated in partnership with AMTRON and Software Technology Parks of India (STPI).

The 5th edition of the North East MSME Conclave in Guwahati provided the MSME fraternity exposure to the financing schemes, showcased their best practices and connected them with large buyers. Workshops on E-way bills, GST compliance, filing and audit were held in Assam, Meghalaya and Mizoram.

Healthcare experts came together at a conclave to bring to the fore the importance of developing an efficient healthcare ecosystem in the North East and building an environment to encourage investments, nurture professional care and bridge the rural urban divide in healthcare provisioning. Dr Vinod Paul, Member, NITI Aayog talked about NHPS and addressed queries on Ayushman Bharat at a session on Implementation of National Health Protection Scheme (NHPS).



From L to R: Dr Jyoti Rama Das, Co-founder, Integra Ventures; Dr W Kharshing, CMD, Woodland Hospital; Dr P K Sharma, MD, Pratiksha Hospital; Anurag Goel, Commissioner & Secretary, Department of Health & Family Welfare, Government of Assam; Dr Harsha Bhattacharjee, Founder, Medical Director and Trustee, Sri Sankardeva Netralaya and Dr Sudhakar Manav, CEO, Apollo Hospitals at the North East Healthcare Conclave in Guwahati

NORTHERN REGION

India's Northern region has seen consistent economic growth over the last decade, on the back of several competitive advantages across sectors, both in manufacturing and services. Uttar Pradesh, Rajasthan and Delhi count amongst the States that make a large contribution to India's economic growth; while the UT of Chandigarh leads the growth chart, Uttarakhand, Delhi, Himachal Pradesh and Jammu & Kashmir have clocked in significant progress over the years.

CII Northern Region (CII NR), worked closely with policy makers, Industry, academia and other key stakeholders to give a further boost to the region's economic growth. CII NR pursued the theme 'Enterprising North: Inclusive, Sustainable and Progressive' for the year 2018-19, through its 12 offices in eight States and a Union Territory. Inclusivity, with special emphasis on ease of doing business, building manufacturing excellence and exploring sectoral opportunities, were at the centre stage of the work during the year. With a view to spurring economic growth, CII NR endeavored to promote new technologies, advocate innovative ways of doing business, build a trade friendly ecosystem, and explore new markets, especially for MSMEs.

ADVOCACY

A wide spectrum of issues was taken up with the policy makers to help build an enabling policy framework in the region. Based on industry feedback and interaction, suggestions were made to strengthen the growth momentum in the States. While advocating the need for ease of doing business, emphasis was given to both, the importance of existing Industry as well as attracting new investments. A series of initiatives were launched in this direction and the Industry's concerns and pain points were voiced to the Central & State Governments.

Some CII recommendations that found place in the changed policies through the year, include the following:

Delhi

Suggestions for building an Incubation Ecosystem have been taken up by the Policy Makers.

Haryana

In view of the recommendations towards building a strong industrial backbone, the logistic sector was accorded 'Industry' status.



From L to R: Marut Sengupta, Deputy Director General, CII; Ram Nath Kovind, President of India; Ajay S Shriram, Past President, CII and Chairman, CII FBN India Chapter and Chairman & Senior MD, DCM Shriram Ltd and Sameer Gupta, Deputy Chairman, CII NR and CMD, Jakson Engineers Ltd at a meeting in New Delhi



From L to R: IMJS Sidhu, Chairman, CII Himachal Pradesh and President & Director In Charge, Vardhman Textiles Ltd; R D Dhiman, then Principal Secretary-Industries, Government of Himachal Pradesh; Jai Ram Thakur, Chief Minister of Himachal Pradesh and Sachit Jain, Chairman, CII NR and Vice Chairman & MD, Vardhman Special Steels Ltd at the NR Council Meeting in Shimla

Himachal Pradesh

The State Electricity Board agreed to abolish the Infrastructure Development Charges (IDC) levied on the change of a unit's ownership.

Jammu & Kashmir

- The suggestion to consider invoicing for calculating GST rates on the tariff of hotels was accepted by the Government
- Recommendations in favor of no toll exemption on wheat bran were accepted by the State Government
- J&K was notified and extended the benefits of GoI S.O.3467(E) that elaborate the increase in permissible truck axle load.

Punjab

- The State Ministry of Finance & Planning accepted the proposal to waive e-way bills amounting to less

than INR 1 lakh applicable on intra-state movement of goods

- Inputs on Disbursal of Fiscal Incentives under GST (IBDP-2017) received the Punjab Bureau of Investment Promotion's consent
- Shifting of 66 KV power line in Industrial Estate Extension, Jalandhar was also considered favorably.

Rajasthan

- Based on the recommendations submitted, the Department of Industries is taking steps to set up an Export Promotion Council
- The suggestion for setting up two additional MSME Facilitation Councils to address the pending cases was favorably considered by the Law Department
- GST rates on handicrafts were rationalized, more items were added to the 'Purchase and Price Preference Policy' and amendments were made to simplify the intra-state GST Bill.



CII delegation in a meeting with Capt Amarinder Singh, Chief Minister of Punjab. From L to R: Chandrajit Banerjee, Director General, CII; Sachit Jain; Capt Amarinder Singh and Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises in Chandigarh



CII delegation with Yogi Adityanath, Chief Minister of Uttar Pradesh in Lucknow

Uttarakhand

Changes for renewal of 'Rice Export Policy' were made by the Government based on the suggestions submitted to them.

Uttar Pradesh

- To promote solar power generation, the subsidy on installation of solar plants was increased from 30% to 40%
- CII's time bound plan to make the State 'load shedding free' over the next 5 years, was taken on board by the concerned Department
- A 5% Floor Area Ratio for construction of Green Buildings was added for building of 5000 sq mt and above
- The UP Pollution Control Board (UPPCB) issued a common application form for consent to operate air, water and hazardous waste authorization. The Board also agreed to renew the consent-to-operate for 3 years instead of 1 year. The UPPCB and the Directorate of Environment are expediting the implementation of online consent/ authorization management systems based on a request submitted by CII
- A single Mandi license for the entire State, single window payment of Mandi tax and abolition of Mandi fee on dairy products were also accepted by the Government.

The Central and State Governments are also deliberating upon a range of representations submitted by CII during the course of the year. The key recommendations under consideration are as follows:

Infrastructure

Given the importance of infrastructure for propelling economic growth, several representations were made towards improving Industry infrastructure. The need for development of the region to facilitate smooth functioning of businesses was also emphasized. Some key recommendations in this direction included:

- Strengthening of existing airports and building four lane roads in industrial corridors of Himachal Pradesh
- Connecting the Haridwar Industry with the Eastern Dedicated Freight Corridor and making Saharanpur/ Tapri a halting station to mitigate the Industry's logistics costs
- Land area above 25 acres, private or allotted by relevant Government agencies in Haryana, be qualified as Mega Projects and thus be entitled to customised incentive packages
- Allocate land for low cost housing facilities for Uttar Pradesh's industrial workers
- Establish ESIC hospitals in major industrial towns across the region.

MSMEs / Start-Ups

The MSME sector is of paramount importance to the region's growth and therefore remained at the center of many key initiatives. Recommendations were made to various State Governments based on an in-depth analysis of the existing MSME scenario in the region:

- Structure a Start-Up Policy to encourage entrepreneurship in Delhi
- Amendment of Delhi's Procurement Policy for the MSMEs

- The Delhi Government is also actively considering a proposal for an Investors Summit
- Extension of the Central Government's FxTE notification to J&K
- Banks were requested to consider not demanding collateral security from MSMEs, when exports are protected by ECGC
- Development authorities are thinking of assigning a minimum fixed percentage of land or smaller sized plots for small and micro units.

Finance & Taxation

The fine points, that require a policy change to safeguard trade interests, were underscored to the Finance & Taxation departments of various States:

- Abolition of Property Tax on industrial units levied by the Himachal Pradesh Municipal Committee to avoid double taxation
- Issuance of C-Form for petroleum products on rollout of GST in Rajasthan
- Reduction of GST rates on almond kernel from 12% to 5% and exemption of toll tax on import of walnut kernels in Jammu & Kashmir
- GST exemption for adventure & leisure sports sector in Jammu & Kashmir
- Defining fixed term employment wage structure for New Delhi.
- Extend the amendments in 'Industry on Incentives' under 'FIIP-2013'
- Mandi Tax exemption for rice exporters who do not have a manufacturing unit and are not registered with SIDCUL
- House and water taxation systems for Industry in Uttar Pradesh be made more reasonable and transparent with a fair assessment mechanism.

Logistics

Keeping in mind the fact that a sound logistic and supply chain network serves as a backbone for Industry, several suggestions were made for the sector's improvement :

- Alteration of FSI norms in Haryana, such as up to 200% FSI for distribution centres / warehouses, logistic parks amongst others
- To make logistics related activities more affordable in the State of Haryana, the excess height of the floor as per the requirement (up to 50m) should not be calculated/ considered
- Issues related to unfair & monopolistic trade

practices adopted by Truck Unions in Himachal Pradesh were pursued during 2018 as well

- Importance of conducting quality checks on packaging material of products brought from outside Jammu & Kashmir was highlighted.

Environment & Pollution

Recommendations on policy changes to reduce the negative impact of industrial pollution on the environment included the following:

- Allocation of a hazardous waste dumping ground for Jammu & Kashmir Industry
- Incorporate ways to prevent and control contaminants, promote treated municipal wastewater, develop sewage treatment projects in the Waste Water Management Policy.

Manufacturing

Given that the growth of manufacturing industry is central to the nation's growth the recommendations revolved around improving the sector's efficiency through an enabling policy environment.

- Removal of entry tax on material/capital goods procured by the Industry for manufacturing in Uttar Pradesh
- Reduction of electricity duty of 2.2% of energy charges per 15 paise per unit with an objective to make manufacturing in Uttar Pradesh viable
- Incentive on revival of sick units under Punjab Industrial & Business Development Policy 2018.

Other Recommendations

Few other recommendations were made with a view to creating an ecosystem that encourages business and economic growth in the region:

- Simplification of section 118 of the Himachal Pradesh Land & Tenancy Act
- Grant of a central incentive package to the hilly States on the lines of the 2003 incentives package
- Haryana to collaborate with Society of Indian Defence Manufacturers to strengthen the Industry's development capabilities through linkages with experts from armed forces, academia and the defence sector
- Provide Uttar Pradesh's fire stations with the latest fire tenders, facilities & requisite trainings to deal with exigencies
- Enable G B Pant University of Agriculture &

Technology to issue 'Phytosanitary Certificates' to help bring down cost of export in Uttarakhand.

The advocacy efforts were given a further impetus with 23 studies and reports undertaken during the year. Reports such as 'Mobility Through Transition: Disruption & Impact', 'SMEs - The Game Changer' and 'Real Estate: Challenges to Opportunities' provide well researched insights into the sectors and topics discussed.

ACTION

Several initiatives, driven forward in 2018 in partnership with State Governments facilitated interaction amongst key stakeholders, including the Government and Industry.

Building Manufacturing Competitiveness

The agenda to catalyse excellence, innovation, employability and productivity across sectors was given a thrust during the year. Close to 20 manufacturing excellence and learning missions, to some of the best companies in the world, encouraged over 700 managers from India's manufacturing sector to adopt excellence practices. They also gained exposure to new & advanced technologies. A learning mission to world class companies such as BMW Group, Man Group, Trumpf AG, Siemens AG and Mercedes Benz in Germany helped participants understand the contours of Smart Manufacturing.

To build competitiveness amongst Member companies, CII NR organised 50 Training Programmes on Quality, Supply Chain Management and Cost Competitiveness. The 12 Quality Circle Competitions held through the year saw participation of 190 teams.

The conferences on new and emerging technologies attempted to bring Industry abreast with global technological advancements. Steps were taken to create a vibrant ecosystem for adoption of Industry 4.0, digital manufacturing, zero effect – zero defect and encourage skill development. Some key events held during the year included Next Stage Manufacturing, Manufacturing Innovation Conclave, Rural Telecom Summit, Automotive Industry Summit 4.0, Automotive Industry Design Conclave, Next-Gen eMobility Summit.

During CII Texcon 2018 held at New Delhi, Smt Smriti Irani, Minister of Textiles, Government of



Ram Nath Kovind, President of India inaugurating the CII Agro Tech India 2018 in Chandigarh. From L to R: Rakesh Bharti Mittal; Ram Nath Kovind; Ajay S Shriram and Chandrajit Banerjee

India highlighted that Indian textile industry has the capacity to go beyond US\$300 billion Industry and achieve US\$500 billion mark by 2025. The Minister also remarked that huge emphasis is being given to exports and the sector has vast potential in the domestic market.

The region's skill development efforts were sustained through work-skill competitions, State-level & national quality circle competitions and regional supervisory skill competitions.

Expanding Reach: Exploring Horizon – Investment Promotion

During 2018-19, CII NR continued to work towards connecting Indian Industry with global Industry, policy makers, and other key stakeholders to explore new markets, attract investments and establish global linkages. Over 40 conferences and 3 trade fairs were also a platform for more than 500 B2B / B2G meetings.

The importance of adopting agricultural technologies received a boost with Shri Ram Nath Kovind, President of India inaugurating the 13th CII Agro Tech India. Themed 'Technology in Agriculture: Increasing Farmers' Income' the exhibition saw participation of over 158 domestic companies. Thirty seven international companies from China, Canada, Germany, Italy, The Netherlands, Spain, UK and USA showcased their technologies at the exhibition.

At the 'Destination Uttarakhand: Investors Summit 2018' held in Dehradun, Shri Narendra Modi, Prime Minister of India appreciated the measures taken by the State to develop as a globally preferred investment destination. Shri Rajnath Singh, Union Minister of Home Affairs also shared his perspectives on the State's progress.



Dignitaries at Invest North India: Investment Opportunities in State of Punjab in Mumbai

The 7th edition of Invest North, held in partnership with the Indian High Commission in Singapore, was aimed at promoting the Northern region as a preferred investment destination by engaging with overseas investment communities. The investor friendly policies rolled out by Uttarakhand, Uttar Pradesh and Punjab and the emerging business opportunities in these States garnered investor interest.

Shri O P Dhankar, Minister for Agriculture, Animal Husbandry and Dairying led a delegation to Argentina, Brazil, Netherlands and Spain to study the farming best practices and explore business collaborations.

Infrastructure

The aviation and real estate sectors were accorded significance with special conferences bringing together Government, Industry and international stakeholders. Senior ministers including Shri Jayant Sinha, Minister for Civil Aviation and Shri Hardeep Singh Puri, Minister of State (I/C), Ministry of Housing & Urban Affairs shared their perspectives with delegates at these conferences. The 9th edition of the Regional Conference on Infrastructure Project Management provided a futuristic perspective of the combination of technology, partnerships and cost consultancy to build the country's infrastructure capability.

CSR / Affirmative Action

Given that inclusive growth is key to sustainable development, CII NR enabled Industry-society engagement. Facilitating CSR and affirmative action as a business agenda remained the focus.

SC/ST entrepreneurs were connected to large companies and PSUs and competitiveness enhancement workshops were also held for them. Over 1500 students from these sections of society were offered jobs at four job fairs. The Social Expo 2018 provided a platform for rural women artisans to sell their products with support from NABARD. The AIDS Awareness Project, being implemented in partnership with Government of Punjab, continued to run successfully in Mandi Gobindgarh. Stakeholders were sensitized on issues such as women safety, sexual harassment at the workplace, need for regular health check-ups.

Membership Connect

The objective of enhancing Membership connect was driven by several focused initiatives. To strengthen the engagement, CII NR designed new outreach models that respond better to Membership needs. Over 15 meets, attended by 806 Members, 11 road shows and another 11 new member induction sessions together helped to build a robust Membership network.

SOUTHERN REGION

With the presence of vibrant manufacturing and services sectors, India's Southern Region makes significant contribution to the country's economy. To enable Industry to continue to forge ahead while being responsible citizens, in 2018-19 CII Southern Region (CII SR) aligned its activities to the theme 'Vibrant South: Competitiveness, Inclusiveness and Responsible', also the National CII theme for the year. The 5-point agenda to drive this theme included entrepreneurship & start-ups, MSME, education & skill development, ease of doing business 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 of various ministries provided platforms to

raise concerns and suggest measures to improve the overall business climate in the country.

Continued engagement with various Task Forces and Committees of Southern State Governments led to several key outcomes. The recommendations on the Central Inspection System were accepted by Andhra Pradesh, Karnataka, Tamil Nadu and Telangana. In addition, suggestions on fiscal prudence under the Model State Budget were submitted to Southern State Governments. Discussions with State Governments were triggered based on studies on policies for sectors such as aerospace & defence, agriculture & food processing, biotech & pharma, logistics and textiles. While promoting e-NAM stakeholder consultations in partnership with FACE, emphasis was placed on food fortification awareness, solar farming, millets, setting up of cold chain infrastructure and other crop specific initiatives.



From L to R: R Dinesh, Chairman, CII SR and JMD, T V Sundram Iyengar & Sons Pvt Ltd; K T Rama Rao, Minister for IT & Industries; Dr S K Joshi, Chief Secretary, Government of Telangana and Sanjay Jayavarthanavelu, Deputy Chairman, CII SR and CMD, Lakshmi Machine Works Ltd at an Interactive Session in Hyderabad

Kerala

- A Joint Consultative Forum constituted with the Government of Kerala, provided the lead for a similar forum to be formed with the Governments of Andhra Pradesh, Telangana and Puducherry
- Efforts were made for promotion of Ayurveda tourism and coconut based industries in Kerala.



From L to R: T Kannan, CMD, Thiagarajar Mills Pvt Ltd; Dr Rajiv Kumar, Vice Chairman, NITI Aayog and S Rajamohan, Chairman, CII Madurai Zone and Founder & MD, Enviro Care India Pvt Ltd at an Interactive Session in Madurai

Tamil Nadu

- A MoU was signed with the Government of Tamil Nadu to promote quality in primary education
- Tamil Nadu was selected for interventions under the project for connecting rural haats to Gramin Agriculture Markets (GrAMs).

Karnataka

- A pilot study of Karnataka's policy ecosystem for improving growth and competitiveness was submitted to the State Government.

Telangana

- Subsequent to its selection under the rural haats to GrAMs Projects, preparations were launched for interventions.

Ease of Doing Business

The ease of doing business efforts in the Southern region were specifically aimed at creating an enabling environment for the existing Industry as well as attracting new investments. Online renewal of labour licenses and e-filing of documents have made doing business much simpler for existing companies. Andhra Pradesh, Karnataka, Tamil Nadu and Telangana simplified the land procurement process with digitisation of rural and urban land records. The Single Window Clearances Portal was implemented in all the States in the region, ensuring ease of investment for new investors. Government of Tamil Nadu appointed CII as the exclusive partner to promote the portal under the Tamil Nadu Business Facilitation Act. The region saw 16 stakeholder consultations on ease of doing business.



Edappadi K Palaniswami, Chief Minister of Tamil Nadu with CII delegation led by R Dinesh in Chennai

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. Of the 166 sessions that impacted 5304 participants from MSME Member companies, the key sessions included those at the Innovation Summit, Auto Serve, Global Ayurveda Summit, MSME Summit, Connect, Weaves, Udyana Surface & Coating, Logistics. With 31 exclusive webinars, CII reached out to 1275 Members besides various B2B platforms. More than 3200 Members benefited from the 115 learning sessions on competitiveness and another 630 Members joined the 33 best practices learning missions held during the year.

Education and Skill Development

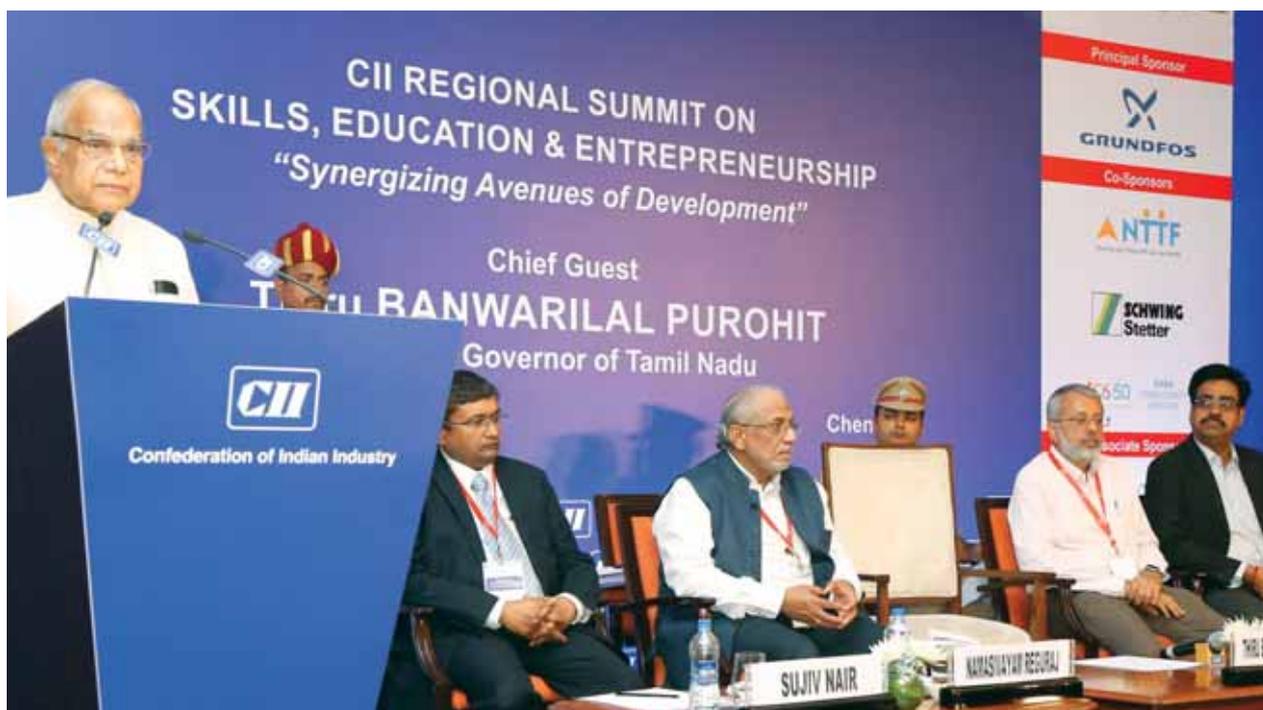
Aligning the education and skill development initiatives to the needs of the Industry, efforts were directed at scaling up skill training across the region. CII EDU Gateway, a portal for connecting educational institutions with Industry was launched to provide information on jobs, internships, Industry updates, Industry expert connect and job fair announcements. A new initiative for student development and faculty engagement, Project Edge, was launched as a part of the Gateway.

A pilot study on rural job creation was undertaken in some districts of Andhra Pradesh, Tamil Nadu, and Telangana. Being implemented in partnership with Industry, as a hub and spoke model, the project aims to provide jobs for rural youth. The CII Model Career Centre in Chennai supports the youth in enhancing employability. With 32,080 online registrations and another 54,406 walk-ins, 750 companies were connected to candidates for 68,889 job openings and more than 16,817 were placed. Another 720 jobs were offered to ex-servicemen in Tamil Nadu through the job fair held in partnership with Ministry of Defence.

Skill development initiatives for auto, auto components and machine tools were undertaken in collaboration with the Tamil Nadu Skill Development Corporation. CII SR also initiated the Skill Gap Study in Puducherry, Kerala and Karnataka under State Skill Development mission. Basic education was provided to over 250 tribal children in Vizag under Project Vidya.

Membership Engagement

Continuing the thrust on Membership engagement, a series of Member Meets were hosted in the presence of the CII President, Vice President, and Chairman/Deputy Chairman in Bengaluru, Hyderabad, Karur, Madurai,



From L to R: Banwarilal Purohit, Governor of Tamil Nadu; Sujiv Nair, CEO, Telangana Academy for Skill and Knowledge, Department of ITE&C, Government of Telangana; Namasivayam Reguraj, Co-Chairman, Skills Sub-committee, CII SR and MD, NTTF and N K Ranganath, Chairman, Job Creation Sub-Committee, CII SR and MD, Grundfos Pumps India Pvt Ltd at the Regional Summit on Skills, Education & Entrepreneurship in Chennai



Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises addressing the Members' Meet in Hyderabad

and Trichy. Membership engagement was given a fillip with 22 Meets in Tier II cities and another 645 Outreach Meetings at Member premises. Collaborations with 76 sectoral associations in initiatives such as Autoserve, Weaves, Surface Coating helped impact over 5380 SMEs. Senior CII Leadership including three Past Presidents, six past Regional Chairpersons and key Past Chairs continued to guide the regional councils and committees. The region saw 2731 Member registrations, an overall growth of 7.1% over the previous year.

Entrepreneurship & Start-Ups

Efforts were made to create a vibrant environment for encouraging entrepreneurship in the region. The Startuppreneurs Forum thus made recommendations

towards State level start-up policies to facilitate a conducive ecosystem and engagement. The Start-Up Conclave provided a business networking platform for budding entrepreneurs and an Online Webinar Series on business excellence helped build capacity. A first of its kind Women Entrepreneurs Empowerment Expo, organised by CII IWN, attracted over 100 Women exhibitors from Tamil Nadu. Another 7613 women entrepreneurs benefited from 116 sessions on women leadership. The Entrepreneurs Awards, an annual forum meant to encourage and showcase emerging entrepreneurs, recognised successful entrepreneurs from the region.

CORPORATE SOCIAL RESPONSIBILITY

During the year, Members were encouraged to adopt innovative and impactful projects for the benefit of the underprivileged sections of society. The CII Development Gateway, is a unique platform that supports NGOs, corporates, institutions in reaching out to the underprivileged, SC/ST entrepreneurs with their education and affirmative action endeavours contributing to the nation building agenda. The Gateway has thus far connected over 1500 NGOs, 150 companies, 500 institutions, experts and adjunct faculties, while also handholding more than 500 SC/ST entrepreneurs



From L to R: Vijay Thadani, Vice Chairman and MD, NIIT Ltd; Gaurav Gupta, Principal Secretary, Information Technology, Biotechnology and Science & Technology, Government of Karnataka; K J George, Minister-Large and Medium Industries and IT & BT, Government of Karnataka; Kris Gopalakrishnan, Past President CII, Chairman, India Innovation Summit and Chairman, Axilor Ventures and N Muthukumar, Chairman, CII Karnataka State Council and President & Wholtime Director, Automotive Axles Ltd at the India Innovation Summit in Bengaluru



From L to R: Banwarilal Purohit; Milind Kamble, Founder Chairman, Dalit Indian Chamber of Commerce & Industry; Sathish Raman, Regional Director, CII SR; Ravi Sam, Chairman-Sustainability, CSR & Affirmative Action Sub-Committee, CII SR and MD, Adwaith Lakshmi Industries Ltd and N K Ranganath at the Regional Conference on Affirmative Action in Chennai

through the Gateway. The CII Development Gateway offers over 1000 CSR projects, 2000 online training programmes and tutorials, 9500 internships while also providing 70,000 jobs to users.

A study was undertaken to understand the ownership of private enterprises by SC/STs and make policy recommendations to strengthen these in the Southern region. The livelihood ecosystem of Tamil Nadu's Tribal Groups is being evaluated. The empirical analysis of their socio-economic situation will help recommend schemes, policies, best practices and business models to improve their livelihood opportunities.

A need assessment of Ramanathapuram District, Tamil Nadu, listed as an aspirational district by Government of India, suggested the way forward and solutions for its development. In addition, of the 40 water bodies taken up by the CII SR Water Alliance in Tamil Nadu, five were handed over to the communities and 5 are undergoing renovation. The Swachh Vidhyalaya initiative under the Project on Rebuilding Rural & Urban Infrastructure in Partnership with the State Government saw on ground projects being delivered. These included construction of separate toilet blocks for boys & girls and provision of hygienic sanitation.

The 20 learning centres in Cuddalore, that provided learning opportunities to 570 underprivileged children in the 6-12 years age group, underwent an evaluation through a Skill Fest. A Task Force, formed in partnership with the Government of Tamil Nadu, will make evidence

based policy recommendations on strengthening the existing education system for improving learning outcomes, creativity and curiosity among children.

A woman centric entrepreneurial development project, to establish all woman farmer producer organisations, was conceived for Cuddalore District in partnership with Blue Star Ltd. The project will bring together women agripreneurs to train them in farming techniques, sales & marketing and finance maintenance.

Over 70 sessions in water energy, solid waste and sustainability initiatives were also held throughout the year in partnership with the Centres of Excellence.



From L to R: Sriram Subramanya, Co-chairman, Millet Task Force, CII SR and Founder, MD & CEO, Integra Software Services Pvt Ltd; K Venugopal, Co-Chairman, Agriculture & Food Processing Task Force, CII SR and Wholtime Director, Kasturi & Sons Ltd; Dr N Subbaiyan, Director, Commissionerate of Horticulture & Plantation Crops, Government of Tamil Nadu; P Ravichandran, Chairman, Agriculture & Food Processing Task Force, CII SR and President, Danfoss Industries Pvt Ltd and S Chandramohan, Vice Chairman, CII Tamil Nadu and President & Group CFO, TAFE Ltd at the Conference on Digital Agriculture in Chennai

WESTERN REGION

The Western Region is amongst India's prominent commercial centres, with the tertiary sector being the dominant contributor to its economy, followed by the secondary and primary sectors. For the year 2018 -19, CII Western Region (CII WR) adopted the theme ARISE For the Nation. To create a conducive environment for sustainable growth and development of Industry, CII WR through its 15 offices and a skilling centre, worked closely with the Government, society and other stakeholders of the ecosystem. The focus areas pursued the individual components of ARISE viz accountability to corporate governance, reforms, innovation, sustainability and employment.

ADVOCACY

CII WR displayed a firm resolution to play a significant part in accentuating robust and inclusive development across domains, and accordingly, charted, designed and implemented action plans through various sub-committees, Task Forces as well as State & Zonal councils. The objective of enhancing the business environment and attracting increased investments was achieved by working closely with State Governments on policy issues. The advocacy efforts were strengthened

through a series of publications, white papers and continuous stakeholder engagement.

The key policy-level initiatives driven through the year included the following:

Manufacturing

Key recommendations on the New Industrial Policy of Maharashtra submitted to Shri Subhash Desai, Minister of Industries and Dr Harshadeep Kamble, Development Commissioner of Industries included:

- Strengthening the Single Window System (SWS), MAITRI, to ensure 100% online process
- Integration of sub-registrar offices with PAN, Aadhar data to create a State-level database and verify accuracy of documents
- Increased FSI to industrial units, built as green buildings
- Online single integrated return for labour laws, registration & obtaining licenses/ renewals
- Online application for CTE/ CTO under Air & Water Acts, with facility of document submission, tracking, monitoring, approval and payment



Narendra Modi, Prime Minister of India with the Board of Governors of AIIB at the AIIB Annual Meeting in Mumbai



Follow up meetings were conducted on the representation to the Minister of Industries, Government of Maharashtra and Development Commissioner of Industries, Maharashtra to consider release of delayed payments to eligible companies under the PSI scheme.

A representation was made to the Central Pollution Control Board and Ministry of Environment, Forest and Climate Change stressing on the need to extend the Plastic Waste Management Rules, 2016 applicable to the entire country, instead of only Maharashtra. A few key suggestions in the approach paper for implementation of Extended Producers Responsibility (EPR) included:

- Possible collaboration by Government of Maharashtra (GoM) with Industry to develop a waste management ecosystem by using and strengthening the existing waste pickers' skills
- Create an action plan for addressing improper management of plastic waste through stakeholder engagement rather than banning the material
- Provide feasible timelines for successful implementation of the regulation.

Sustainable Solutions

Gujarat: Recommendations on the State Electric Vehicle Policy, submitted to the Energy Minister, along with CII Gujarat Knowledge Application and Facilitation Centre, included broad guidelines on infrastructure such as ICT and power supply, EV tariffs, promoting renewable energy (RE), encouraging R&D, creating testing infrastructure and manufacturing/ assembly parks.

Goa: Suggestions on the Draft Solar Policy, 2017 focused on allowing net metering facility to HT prosumers who have connected loads above 100KW and avail power supply at 11KV/ 33KV/ 110KV; creation of a SWS in Goa Energy Development Agency (GEDA) for processing and sanctioning soft loans; and limiting maximum capacity of solar plants to 80% of recorded demand to eliminate the need for enhancing evacuation facility.

Maharashtra: With a view to encouraging RE generation, a white paper advocating a clear and time-bound process for open access permissions and single window clearance was submitted to the State Government. The importance of exempting RE from electricity duty, removing banking restrictions on RE generators and easing RE procurement for small consumers was also highlighted.

Infrastructure

Madhya Pradesh: Bhopal's air connectivity to major cities in India was improved with addition of new flights based on several CII representations to the State Government.

Goa: Grant of Industry status to logistics-related activities and earmarking at least 10% of the GIDC land for such activities was strongly advocated for during the year. It was also suggested that a Goa Marine Board be constituted to oversee development of maritime logistics, setting up dedicated truck routes to justify the cargo volumes.

Ease of Doing Business

A pilot project was undertaken to support the Group of Ministers (GoM) in creating an Industry feedback mechanism and ensuring on-ground effectiveness of reforms. Based on the meetings held with the Chief Secretary and the Development Commissioner of Industries, Maharashtra, a district-wise implementation plan will be outlined along with the GoM. Empowering MAITRI as a one-stop decision making body and following a proactive approach to introducing reforms were highlighted as two key actions points. The feedback mechanism may be rolled out in other WR States soon. Recommendations to improve ease of doing business were also submitted at the 15th Finance Commission meetings.

Taxation

Industry's concerns with respect to legal and procedural aspects of GST and challenges arising from the inverted tax structure, refunds and input tax credit were highlighted to the Government. In addition, inputs on the Pre-Budget Memorandum were also shared. Meetings were held with officials of GST Council in Delhi and also the GST Commissioners of Western States to discuss GST-related issues faced by the industry.

ACTION

During the year, CII continued to engage closely with the Government and key stakeholders to promote the region's growth. The following initiatives were undertaken in partnership with the States:

- Efforts to provide farmers access and exposure to latest farming technologies continued along with the Government of Madhya Pradesh. The 6th edition of Krishi Vikas was an ideal platform for the Industry



Balkrishna Patidar, the then Minister of State, Farmer Welfare and Agriculture Development & Labor (I/C), Government of Madhya Pradesh at the Krishi Vikas exhibition in Indore

to demonstrate farming techniques and implements to the relevant target audience

- Various State-level competitions served as an encouragement to promote excellence amongst vocational students. Around 2200 students showcased their skills in 28 trades during the cluster level Mahakaushalya competitions held in Mumbai, Nagpur and Pune. Competing at the State-level, winners will get an opportunity to represent India at the World Skill Competition, 2019 in Kazan, Russia
- CII was the Industry partner for the 8th Regional 3R Forum in Asia and the Pacific organised in Indore by the Ministry of Housing and Urban Affairs (MoHUA), Government of India (GoI), Ministry of Environment of the Government of Japan (MOEJ), and the United Nations Centre for Regional Development (UNCRD). Smt Sumitra Mahajan, Speaker of the Lok Sabha shared her vision of 'Achieving Clean Water, Clean Land and Clean Air through 3R and Resource Efficiency- A 21st Century Vision for Asia-Pacific Communities'. The forum featured an exhibition

with participation from Australia, Japan, Russia, Singapore, the UN and the municipal corporations from Coimbatore, Indore, Kanpur and Ujjain

- Carrying forward the fight against use of plastic, Government of Gujarat observed the World Environment Day with the theme 'Beat Plastic Pollution: If you can't reuse it, refuse it'. As Knowledge Partner to this initiative, CII highlighted the steps taken by the Government towards plastic waste management
- Seven mega job fairs facilitated by CII Model Career Centre (MCC) in Aurangabad, Goregaon, Kolhapur, Nagpur, Nashik, Pune and Vashi saw participation of over 28,000 students and 523 companies. At the fairs, organised with the Department of Industry, Government of Maharashtra, 11,201 job offers were generated.

Sector Focus

- Efforts to enable MSMEs to become more efficient, get global exposure and build competitiveness continued during the year. On the occasion of the International MSME Day, a platform was created in partnership with the Government of Madhya Pradesh, for innovative MSMEs, start-ups and those in the food processing sector to get a global perspective. They also learnt how to leverage IT and the existing laws to enhance their efficiency. A SME Business Delegation to South Korea and Japan, led by Mr Piruz Khambatta, Chairman, CII WR, aimed at enhancing bilateral trade and investment relations with these countries. Members from sector like auto component, electrical, engineering,



Prime Minister of India Narendra Modi along with dignitaries at the Vibrant Gujarat Global Summit in Gandhinagar



Devendra Fadnavis, Chief Minister of Maharashtra being felicitated by Dr Harshadeep Kamble, Development Commissioner (Industries), Directorate of Industries, Government of Maharashtra in the presence of Subhash Desai, Industries Minister, Government of Maharashtra at the job fair in Nashik

IT services, machinery, real estate, entertainment, manufacturing, packaging and textiles among others joined the mission. The corporate sessions addressed issues of start-ups related to funding, market entry, technological support, manufacturing and production

- Various Start-Up Corporate Connect sessions on edu-tech, med-tech and manufacturing tech connected over a 100 start-ups with relevant Industry mentors, guides and a dozen incubators
- The 4th edition of the CII WR Higher Education Summit highlighted the need for higher education institutions to adopt innovation and become flexible. Eminent personalities from academia, Government and corporates led the discussions on topics like on voice of stakeholders, technology disruption & future of work, collaboration, co-creation & incubation and the role of self for the future of education
- Technology, innovations, limitations and scope for growth in the horticulture sector were discussed at the Horticultural Export Conclave, organised as a part of the initiative to identify key priorities to increase India's horticultural exports. Adoption of quality standards such as Codex/ Agmark for horticulture produce marketed through organised retail chains emerged as a key action area to achieve this objective
- The Environ Expo 2018 showcased the latest technologies in the field of clean energy,

environment protection, e-mobility and waste management. Shri Subhash Desai, Industries Minister, Government of Maharashtra, visited the expo and interacted with exhibitors.

Special Initiatives

- The 3rd Annual Meeting of Asian Infrastructure Investment Bank (AIIB) was inaugurated by Shri Narendra Modi, Prime Minister of India. Over 2,000 representatives from public & private sector, academia, media, civil society organisations and non-government organisations deliberated on the theme-Mobilizing Finance for Infrastructure: Innovation and Collaboration
- The 9th Vibrant Gujarat Summit, inaugurated by the Prime Minister of India, was a forum for discussions on global, national and state-level agendas with a sharp focus on all-round economic development for a 'New India'. The 2019 edition of the Summit witnessed signing of 28,360 Memorandums of Understanding, which are expected to generate over 21 lakh jobs.

International Engagement

Various networking platforms were created for Industry, Heads of States, Ministers and Diplomats, with the aim to strengthen engagement with international diplomatic and business communities. Some key dignitaries that CII engaged with included Ministers from Netherlands, United Arab Emirates, Singapore, United



From L to R: Dr M Ariz Ahammed, MD, National Horticulture Board; Aya Suzuki, Second Secretary of Embassy of Japan in India; Arabind Das, Convenor, CII Maharashtra Panel on Agriculture and Food Processing & COO, Godrej Tyson Foods Ltd; Sanjay Dave, Chairman, Surakshit Khadya Abhiyan, Chairman, FAO / WHO Coordinating Committee for Asia and Former Chairman, Codex Alimentarius Commission; Devanshu Gandhi, MD, Vadilal Industries Ltd and Bijay Kumar, Former Additional Chief Secretary (Agriculture and Marketing), Government of Maharashtra at the Horticultural Export Conclave in Pune

Kingdom, Germany and USA. Meetings with Consul Generals of Australia, Singapore, Canada, Netherlands and the Chairman of the China Council for Promotion of International Trade (CCPIT) helped strengthen international engagements.

The Annual Reception for Consul Generals and Heads of Mission, aimed at facilitating exploration of business opportunities, saw participation from 19 countries. Support was extended to delegations from Canada, China, Dubai, Indonesia, Japan, Netherlands, South Africa, UK and USA for connecting with stakeholders. The region also facilitated ASEAN-India Student Exchange Programme 2018 to Mumbai and Pune.

Building Competitiveness

Efforts to build Industry competitiveness and future-readiness continued through the year. A series of training sessions, awareness programmes and learning missions provided Members the opportunity to learn and share best practices as well as get exposure to global ecosystems.

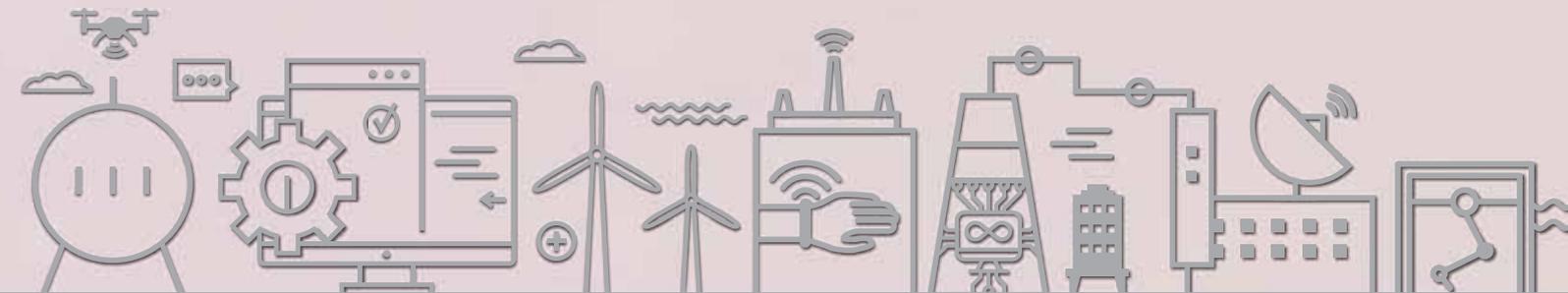
CII WR Indian Women Network (IWN), through its Four State offices and three zonal chapters, organised a host of initiatives across topics like health, general management and human resource management. The flagship event 'WomeNation' themed - Celebrating Success saw enthusiastic participation.



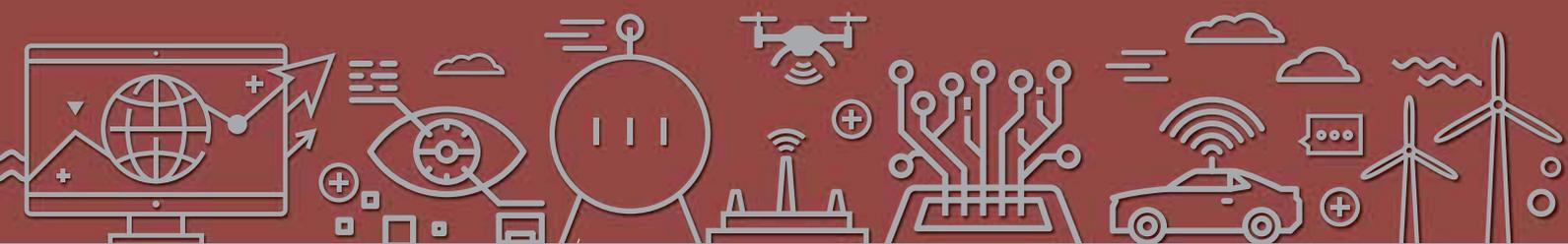
CII SME delegation at the KOTRA Headquarter in Seoul, South Korea



MEMBERSHIP SERVICES

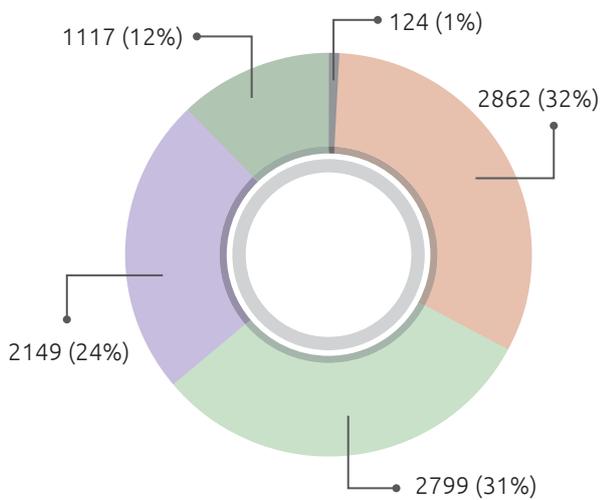


- › Membership Engagement
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- › Team CII
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- › CII Network
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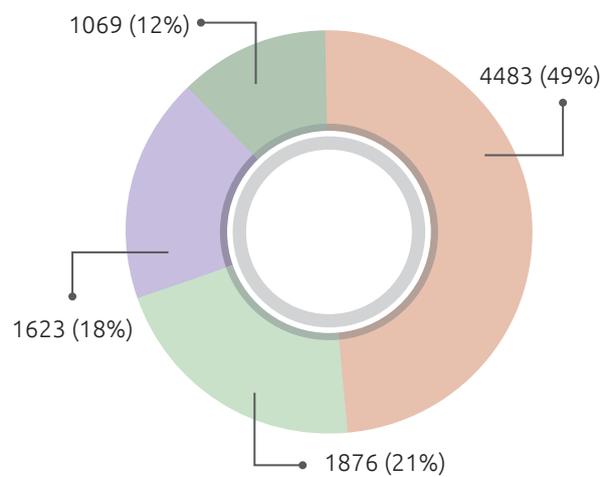
CII's MEMBERSHIP ENGAGEMENT IN 2018

REGION-WISE CLASSIFICATION



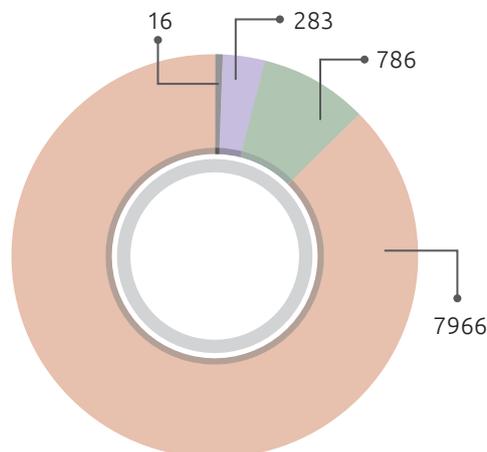
● Southern Region
 ● Western Region
 ● National
● Northern Region
 ● Eastern Region

SCALE-WISE CLASSIFICATION

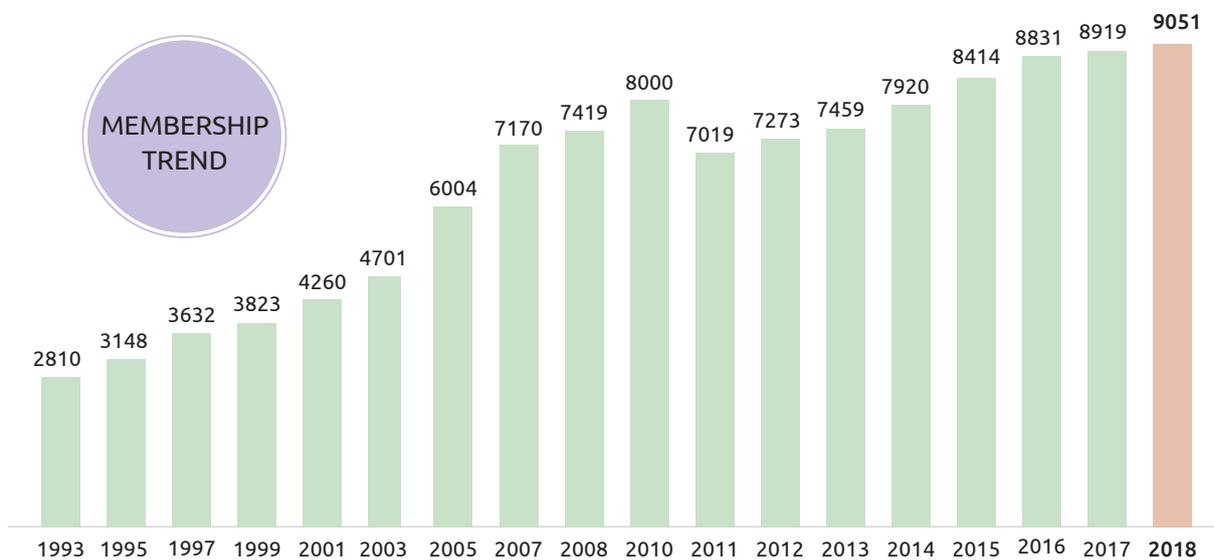
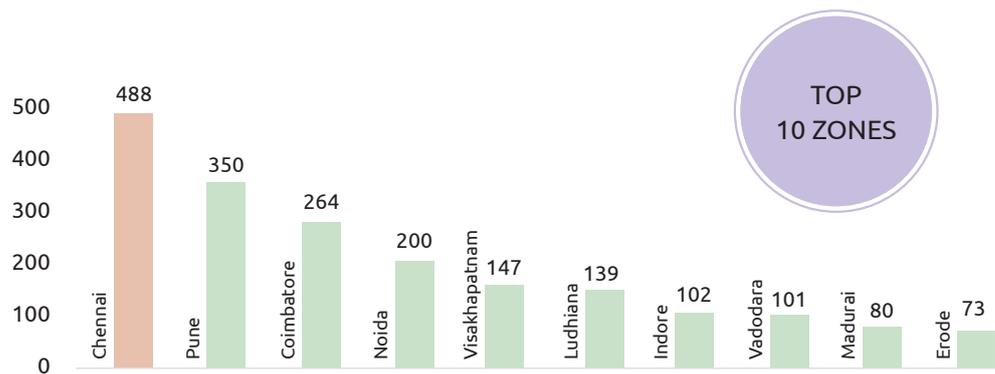
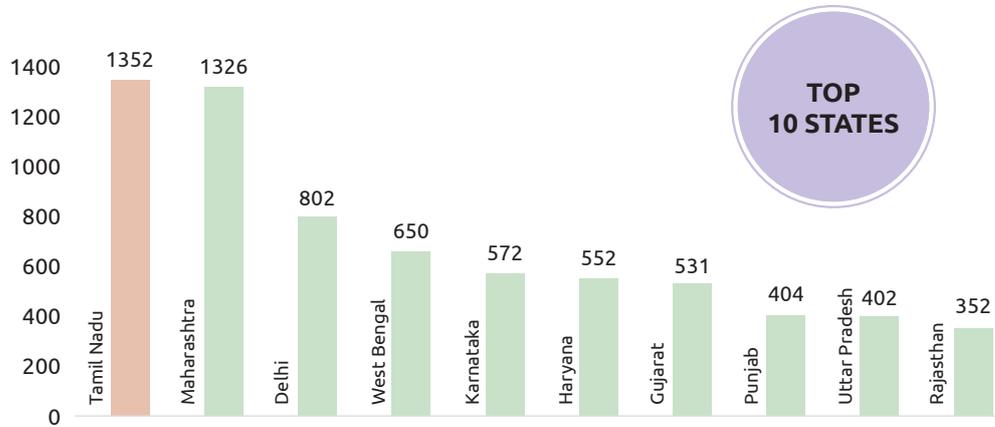


● Small
 ● Medium
● Large
 ● Institutions and Associations

TYPE-WISE CLASSIFICATION



● Associate Members
 ● Institutional Members
 ● Affiliated Associations
 ● Primary Members



MEMBERSHIP ENGAGEMENT

Membership services are the bedrock of the CII agenda. Over the last few years, a wide-ranging portfolio of services, tailored to Members' needs, has evolved based on continuous dialogue and feedback. A suite of Membership services, including a mentorship programme, attestation of commercial documents, directory of Members, reward points redemption, the CII brand store are offered to Members.

During 2018, CII continued its focus on strengthening the outreach and Membership engagement through a series of initiatives and services.

- Membership engagement was driven in 40 locations, with 2965 CII Members joining the 61 Members meets at these locations
- The Outreach Initiative was given a thrust through visits to 3224 Member companies at their premises
- The 45 'New Member Induction Sessions' at 30 locations helped the 521 new Members understand and better utilize CII Services
- With 2005 participants attending the 86 roadshows

at 47 locations, efforts continued to build robust Membership growth

- In 2018, 1043 new Members joined CII
- To understand the issues faced by Member companies, the Membership Issue Trackers are being compiled by zones, States and regions. Currently 139 issues, highlighted through these trackers, are being pursued.

MyCII

MyCII, continued to be a repository of information and intellectual capital. The 3.3 lakh users had access to resources on four key areas of business, information, networking and knowledge. Amongst the largest business resource centres in the country, MyCII also served as a networking platform for SMEs as well as large enterprises. The platform made it possible for business leaders and Industry from India & overseas to connect, facilitated finance for SMEs, and continued to be an aggregator for Government policies, notifications, schemes and investment alerts.



From L to R: R Agrawal, Senior Manager, Sarda Energy & Minerals Ltd; Pankaj Sarda, Chairman, CII Chhattisgarh State Council and Joint MD, Sarda Energy & Minerals Ltd; Bhupesh Baghel, Chief Minister of Chhattisgarh; Chandrajit Banerjee, Director General, CII and B L Agrawal, MD, Hira Group of Companies in Raipur



From L to R: Sofi Zahoor, Chairman, CII Chandigarh Council, and Senior Director, HR & Operations, Quarkxpress Publishing R&D (India) Ltd; Sarvjit Singh Samra, Chairman, CII Punjab State Council and MD, Capital Small Finance Bank Ltd; Sameer Gupta, Deputy Chairman, CII NR and CMD, Jakson Engineers Ltd; Sachit Jain, Chairman, CII NR and Vice Chairman & MD, Vardhman Special Steels Ltd; Ankur Singh Chauhan, Regional Director, CII NR; Jasmohan Singh, Chairman, CII Haryana State Council, and MD, Frick India Ltd and IMJS Sidhu, Chairman, CII Himachal Pradesh State Council and President & Director-Incharge, Vardhman Textiles Ltd at the Members' Meet in Chandigarh

Networking Facilitation

MyCII facilitates business networking through an online B2B meeting platform that hosts and brings together delegates, exhibitors, sponsors and others on one platform. During the year, over 12000 B2B meetings between domestic and international delegates were scheduled through various events with the help of this platform. MyCII users had access to online group discussions and networking with Members of other online groups and communities. Membership directory was also available to the MyCII users.

Webinars & Online Master Classes

A total of 390 webinars, including online courses, were attended by more than 8500 unique Members and non-members. Sessions on diverse topics such as brand management, cost management for SMEs, leadership transformation offered the latest knowledge and best practices. A series of 24 webinars conducted in Hindi helped break the language barrier in learning and improve computer literacy of the Indian workforce. The master classes and webinars continue to be available on MyCII under the knowledge resources section.



From L to R: D Raju, Vice Chairman, CII Telangana and MD & CEO, Kirby Building Systems & Structures India P Ltd; Vikram Kirloskar, Vice President, CII and Chairman & MD, Kirloskar Systems Ltd and Vice Chairman, Toyota Kirloskar Motor and Sanjay Singh, Chairman, CII Telangana and Divisional Chief Executive, ITC Ltd - PSPD at the Members' Meet in Hyderabad



From L to R: B Thiagarajan, Chairman, CII Maharashtra State Council and Joint MD, Blue Star Ltd; Uday Kotak, President-Designate, CII and Executive Vice Chairman & MD, Kotak Mahindra Bank Ltd; Rakesh Bharti Mittal, President, CII and Vice Chairman, Bharti Enterprises and Piruz Khambatta, Chairman, CII WR and CMD, Rasna Pvt Ltd at the Members' Meet in Mumbai

TEAM CII

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Agriculture Council	Chair: Mr Salil Singhal CMD, PI Industries Co-chair: Mr B Thiagarajan Joint MD, Blue Star
Allied Sectors in Agriculture - Dairy, Poultry & Fisheries Committee	Chair: Mr Arabind Das Chief Operating Officer Godrej Tyson Foods Co-chair: Mr Vivek Nirmal Managing Director & CEO Prabhat Dairy
Associations' Council (ASCON)	Mr Vikram Kirloskar Vice Chairman, Toyota Kirloskar Motor
Aspirational Districts Development Committee	Mr Sudhir Deoras Former Advisor TRF
Banking Committee	Chair: Mr Uday Kotak Managing Director & CEO Kotak Mahindra Bank Co-chair: Ms Zarin Daruwala CEO-India, Standard Chartered Bank
Biotechnology Committee	Chair: Dr Rajesh Jain Joint MD, Panacea Biotec Co-chair: Mr Mahesh Bhalgat Executive Director & COO Shantha Biotechnics
Capital Goods & Engineering Committee	Chair: Mr Atul Sobti CMD, BHEL Co-chair: Mr Nikhil Sawhney Vice Chairman & MD, Triveni Turbines
Chemicals Committee	Chair: Mr Raman Ramachandran CMD, BASF India Co-chairs: 1. Mr Sudhir Shenoy CEO & President Dow Chemical International 2. Mr Ashish Bharat Ram MD, SRF
Civil Aviation Committee	Mr Ajay Singh Chairman & MD, SpiceJet
Climate Change Council	Chair: Mr Jamshyd N Godrej CMD, Godrej & Boyce Manufacturing Company Co-chair: Mr Sumant Sinha Founder Chairman & CEO, ReNew Power
Committee for CFOs	Mr Ramesh Subramanyam CFO, Tata Power

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Construction Committee	Chair: Mr Atul Punj Chairman, Punj Lloyd Co-chair: Mr Arjun Dhawan Director & Group CEO, Hindustan Construction Company
Corporate Governance Council	Mr Uday Kotak Managing Director & CEO Kotak Mahindra Bank
CSR Committee	Dr Raghupati Singhanian CMD, JK Tyre & Industries
Defence Committee	Mr Baba N Kalyani CMD, Bharat Forge
Design Committee	Chair: Mr Udayant Malhoutra CEO & MD, Dynmatics Technologies Co-chair: Ms Rajshree Pathy Chairperson Rajshree Sugars & Chemicals
eCommerce Committee	Mr Ritesh Agarwal Founder & CEO, Oravel Stays
Economic Affairs Council	Mr Vinayak Chatterjee Chairman, Feedback Infra
Education Council	Chair: Mr Sunil Kant Munjal Chairman, Hero Enterprise Co-chair: Mr BVR Mohan Reddy Founder & Executive Chairman, Cyient
Environment Committee	Mr R Mukundan MD, Tata Chemicals
EXIM Committee	Chair: Mr Sanjay Budhia MD, Patton International Co-chair: Mr Shreekant Somany CMD, Somany Ceramics
Expert Group on Doubling Farmers' Income	Chair: Mr S Sivakumar Group Head - Agri & IT Businesses, ITC Co-chair: Mr Navas Meeran Chairman, Eastern Group of Companies
FBN India Chapter Council	Mr Ajay S Shriram Chairman & Senior MD, DCM Shriram
Financial Inclusion and Digitisation Committee	Chair: Dr Janmejaya Sinha Chairman, BCG India Co-chair: Mr Ajay Kaushal Co-Founder & Director Indiaideas.com (Billdesk)
Financial Markets Committee	Chair: Mr Leo Puri Former MD, UTI Asset Management Co Co-chair: Mr Vishal Kampani MD, JM Financial

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Financial Reporting Committee	Mr P R Ramesh Chairman Deloitte India
Financial Sector Development Council	Mr Nimesh N Kampani Chairman JM Financial Group
FMCG Committee	Chair: Mr Bharat Puri MD, Pidilite Industries Co-chair: Mr Sudhir Sitapati Executive Director- Food & Refreshment, Hindustan Unilever
Food Processing Committee	Chair: Mr Suresh Narayanan CMD, Nestle India Co-chair: 1. Mr Sunil Duggal CEO, Dabur 2. Mr Ashwini Malhotra MD, Weikfields Foods
Footwear Committee	Mr Adesh Gupta CEO, Liberty Shoes
Future Businesses Council	Chair: Mr Rajan Navani MD, Jetline Group of Companies Co-chair: Mr Anuj Kapuria CEO, The Hi-Tech Robotic Systemz
Healthcare Council	Dr Naresh Trehan CMD, Medanta - The Medicity
Hydrocarbons Committee	Chair: Mr Sashi Mukundan Regional President and Head of Country-India, BP Group Companies Co-chair: Mr Nitin Prasad Chairman, Shell Group of Companies in India
ICTE Manufacturing Committee	Chair: Mr Vinod Sharma Managing Director, Deki Electronics Co-chair: Mr Sunil Vachani Chairman, Dixon Technologies (India)
India@75 Council	Mr Rajan Navani MD, Jetline Group of Companies
Indian Women Network (IWN) & Women Empowerment Committee	Chair: Ms Rumjhum Chatterjee Group MD, Feedback Infra Co-chair: Ms Bhairavi Jani Executive Director, SCA Group
Industrial Relations Committee	Mr M S Unnikrishnan Managing Director & CEO Thermax
Infrastructure and Smart Cities Council	Mr Sanjay Ubale Head - Infrastructure and Urban Solutions, Tata Sons
Insurance & Pensions Committee	Mr Sanjiv Bajaj MD Bajaj Finserv
Intellectual Property Rights Committee	Co-chairs: 1. Mr Sudhir Mehta CMD, Pinnacle Industries 2. Mr Arvind Thakur Vice Chairman & MD, NIIT Technologies

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
International Council	Chair: Dr Naushad Forbes Co-chairman, Forbes Marshall Co-chair: Mr Vijay Sankar Deputy Chairman, The Sanmar Group
International Trade & Trade Policy Committee	Chair: Mr R Seshasayee Chairman, IndusInd Bank Co-chair: Mr Deep Kapuria Chairman, The Hi-Tech Group
IT & ITeS Committee	Chair: Mr Anant Maheshwari President, Microsoft Corporation - India
Leadership & HR Committee	Mr T V Narendran Global CEO & Managing Director Tata Steel
Legal Services and Arbitration Committee	Mr Shardul S Shroff Executive Chairman, Shardul Amarchand Mangaldas & Co
Logistics Committee	Chair: Mr Mahendra Agarwal Founder & CEO, GATI Co-chairs: 1. Mr Bharat Joshi Director, Associated Container Terminals 2. Mr Sandeep Barasia Managing Director, Delhivery
Make in India - Renewables Committee	Chair: Mr Tulsi Tanti Chairman and Managing Director Suzlon Energy Co-chair: Mr T P Chopra CEO, Bharat Light & Power
Manufacturing Council	Chair: Dr Pawan Goenka MD, Mahindra & Mahindra Co-chair: Mr Deep Kapuria Chairman, The Hitech Group
Media & Entertainment Committee	Chair: Mr Sudhanshu Vats Group CEO, Viacom18 Media Co-chair: Ms Jyoti Deshpande President-Media & Entertainment Reliance Industries
Membership Council	Mr Vikram Kirloskar Vice Chairman, Toyota Kirloskar Motor
Mining Committee	Chair: Mr Anil Kumar Jha CMD, Coal India Co-chair: Mr Sunil Duggal CEO & Whole Time Director Hindustan Zinc
MNCs Committee	Mr Sanjiv Mehta CEO & MD, Hindustan Unilever
MSME Council	Chair: Mr Shreekanth Somany CMD, Somany Ceramics Co-chairs: 1. Mr Nalin Kohli Chairman & CEO, Araina Enterprises 2. Mr Pradeep Bhargava Director, Persistent Systems
NBFCs Committee	Chair: Mr Ajay Srinivasan Chief Executive, Aditya Birla Capital Co-chair: Mr Abhimanyu Munjal Joint MD & CEO, Hero FinCorp

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
North East Council	Chair: Mr S K Barua MD, Numaligarh Refinery Co-chair: Mr Abhijit Barooah MD, Premier Cryogenics
Nutrition Committee	Ms Vinita Bali Chair, Board of Directors, GAIN
Pharmaceuticals Committee	Chair: Dr Rajiv I Modi CMD, Cadila Pharmaceuticals Co-chair: Mr Srin Srinivasan MD, Hospira Healthcare
Power Committee	Co-chairs: 1. Mr Rajiv Ranjan Mishra MD, CLP India 2. Mr Praveer Sinha MD & CEO, Tata Power
Private Equity & Venture Capital Committee	Chair: Mr Sanjay Nayar CEO, KKR India Advisors Co-chair: Mr Rajesh Srivastava CMD, Rabo Equity Advisors
Public Health Committee	Ms Suneeta Reddy MD, Apollo Hospital Enterprise
Public Policy Council	Mr Subodh Bhargava Past President, CII
Public Sector Enterprises Council	Chair: Mr Anoop K Mittal CMD, NBCC
Railways Committee	Chair: Mr Umesh Chowdhary Vice Chariman & MD, Titagarh Wagons Co-chair: Mr Sachin Bhanushali CEO & Whole Time Director, Gateway Rail Freight
Real Estate & Housing Committee	Co-chairs : 1. Mr Anshuman Magazine Chairman, India & South East Asia CBRE 2. Mr Neel C Raheja Group President, K Raheja Group
Regulatory Affairs Committee	Ms Zia Mody Senior Partner, AZB & Partners
Retail Committee	Mr Shashwat Goenka Sector Head - Retail & FMCG RPG Sanjiv Goenka Group
Services Council	Ms Shobana Kamineni Vice Chairperson Apollo Hospitals Enterprise
Shipping & Ports Committee	Mr Rizwan Soomar CEO & MD, Hindustan Ports
Skill Development Committee	Chair: Mr Arun Nanda Chairman Mahindra Holidays & Resorts India Co-chair: Mr Soumitra Bhattacharya Managing Director, Bosch India

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Smart Manufacturing Council	Chair: Mr Sunil Mathur Managing Director & CEO, Siemens Co-chairs: 1. Dr Arindam Bhattacharya Senior Partner and Director The Boston Consulting Group 2. Mr Sunjay Kapur MD, SONA BLW Precision Forgings
Solar Energy Committee	Co-chairs: 1. Mr Rahul Munjal CMD, Hero Future Energies 2. Mr Ratul Puri Chairman, HPPPL
Space Committee	Mr Rakesh Sasibhushan CMD, Antrix Corporation
Special Abilities	Co-chair: Ms Pankajam Sridevi MD, ANZ Banking Group
Sports Committee	Chair: Mr Sanjay Gupta MD, Star India Co-chair: Mr Jalaj Dani MD, Smiti Holding and Trading Company
Start-up Council	Chair: Mr S Gopalakrishnan Co-Founder, Infosys & Chairman Axilor Ventures Co-chairs: 1. Mr Nalin Kohli Chairman & CEO, Araina Enterprises 2. Ms Anu Acharya CEO, Mapmygenome India
Steel Committee	Chair: Mr Seshagiri Rao Joint MD & Group CFO, JSW Steel Co-chair: Mr Anand Sen President, Tata Steel
Taxation Committee	Mr Rajiv Memani Chairman - India Region & Emerging Markets Committee, Ernst & Young
TCM Committee	Chair: Mr Seshagiri Rao Joint MD and Group CFO, JSW Steel Co-chair: Mr Kamal Bali President & MD, Volvo Group India
Technology Committee	Co-chair: Ms Debarati Sen Managing Director, 3M India
Telecom and Broadband Committee	Chair: Mr Kiran Karnik Former President, NASSCOM Co-chair: Mr Umang Das Chief Mentor, ATC India
Textiles and Apparels Committee	Chair: Mr Gautam Nair MD, Matrix Clothing Co-chairs: 1. Mr Salman Noorani MD, Zodiac Clothing Co 2. Mr Kulin Lalbhai Executive Director, Arvind Ltd

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Tourism & Hospitality Committee	Chair: Mr Dipak Haksar Chief Executive, ITC Hotels Co-chairs: 1. Mr Arjun Sharma Chairman, Select Group 2. Mr Ritesh Aggarwal Founder and CEO, Oravel Stays
Trade Fairs Council	Mr Vipin Sondhi MD & CEO, JCB India
Water Committee	Chair: Mr Ramesh Datla CMD, ELICO Co-chair: Mr N K Ranganath MD, Grundfos
Task Force on Affirmative Action	Co-chairs: 1. Mr Farhad Forbes Chairman, Forbes Marshall 2. Mr Milind Kamble Chairman, DICCI
Task Force on Artificial Intelligence	Mr Rajan Navani MD Jetline Group of Companies
Task Force on Arts & Crafts	Mrs Tarana Sawhney Member-Advisory Board, Foundation for Indian Contemporary Art (FICA)
Task Force on Bio-Energy	Mr G S Krishnan Regional President Novozymes South Asia
Task Force on CII University	Dr Naushad Forbes Co-chairman, Forbes Marshall
Task Force on Ease of Doing Business	Chair: Mr Sumit Mazumder CMD, TIL Co-chair: Mr Milon Nag CMD, K K Nag
Task Force on Electric Mobility and Battery Storage	Mr Manoj Kohli Executive Chairman SoftBank Energy
Task Force on Financial Distribution	Mr Deepak Premnarayan Executive Chairman ICS Realty
Task Force on Integrity and Transparency in Governance	Mr Sumit Mazumder CMD TIL
Task Force on Judicial Reforms	Chair: Mr R Seshasayee Chairman, IndusInd Bank Co-chair: Mr Shardul Shroff Executive Chairman, Shardul Amarchand Mangaldas & Co
Task Force on Livelihood	Mr Hari S Bhartia Co-chairman & MD Jubilant Life Sciences
Task Force on Making NCR less Polluted	Chair: Ms Vaishali Nigam Sinha Chief Sustainability, CSR and Communications Officer, Renew Power Co-chair: Mr Sandeep Sinha MD, Cummins India

Councils / Committees / Task Forces	Chair / Co-chair for 2018-19
Task Force on Sustainable Solutions	Chair: Mr Nitin Desai Former Under Secretary General Co-chair: Mr Vineet Mittal Chairman, Avaada Group
Task Force on Wind Energy	Mr Ramesh Kymal CMD, Siemens Gamesa Renew Power
Working Group on Population and Development	Mr Sandipan Chakravorty Chairman TM International Logistics
LAC Committee	Mr Jai Shroff Global CEO, UPL
Central Asia Committee	Mr Shiv Vikram Khemka Vice Chairman, Sun Group
CII South East Asia Committee	Co-chair: Dr Anish Shah Group President - Strategy Mahindra and Mahindra
Gulf Committee	Chair: Mr Yusuff Ali M A CMD, Lulu Group International Co-chair: Mr K K M Kutty Chairman, South West Group
CII-Institute of Quality Advisory Council	Mr R Mukundan Managing Director Tata Chemicals
CII-Institute of Logistics Advisory Council	Mr R Dinesh Joint Managing Director T V Sundram Iyengar & Sons
CII-ITC Centre of Excellence for Sustainable Development	Mr Y C Deveshwar Chairman ITC
CII - Naoroji Godrej Centre of Excellence Advisory Council	Mr Jamshyd N Godrej Chairman & Managing Director Godrej & Boyce Manufacturing Company
CII - Sohrabji Godrej Centre of Excellence Advisory Council	Mr Jamshyd N Godrej Chairman & Managing Director Godrej & Boyce Manufacturing Company
CII - Triveni Water Institute Advisory Council	Mr Dhruv M Sawhney Chairman & Managing Director Triveni Turbine
CII - Jubilant Bhartia Food and Agriculture Center of Excellence Advisory Council	Mr Hari S Bhartia Co-chairman & MD Jubilant Life Sciences
CII-Suresh Neotia Centre of Excellence for Leadership Advisory Council	Mr Harshavardhan Neotia Chairman Ambuja Neotia Holdings
CII Centre of Excellence for Competitiveness for SMEs Advisory Council	Mr Shreekant Somany CMD Somany Ceramics

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Confederation of Indian Industry

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, India's premier business association has around 9000 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from around 265 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.

As a developmental institution working towards India's overall growth with a special focus on India@75 in 2022, the CII theme for 2018-19, **India RISE : Responsible. Inclusive. Sustainable. Entrepreneurial** emphasizes Industry's role in partnering Government to accelerate India's growth and development. The focus will be on key enablers such as job creation; skill development; financing growth; promoting next gen manufacturing; sustainability; corporate social responsibility and governance and transparency.

With 65 offices, including 9 Centres of Excellence, in India, and 10 overseas offices in Australia, China, Egypt, France, Germany, Singapore, South Africa, UAE, UK, and USA, as well as institutional partnerships with 355 counterpart organizations in 126 countries, CII serves as a reference point for Indian industry and the international business community.

Confederation of Indian Industry

The Mantosh Sondhi Centre

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