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KNOWLEDGE PAPERS

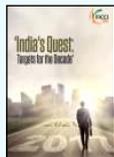
Series 1/2018



FICCI Pre Budget Memorandum

FICCI Pre Budget Memorandum 2018-2019 was submitted to the Government in December 2017. Apart from sectoral issues and suggestions, specific suggestions on the direct and indirect tax side for the consideration of the Government are set out in this Memorandum. Some of the important recommendations made by FICCI in the Memorandum are Reduction in Tax Rate to retain India's Competitiveness, Addressing tax abuse – Review Section 56(2)(x) and 50CA of the Income Tax Act, 1961 ('the Act'), Grant of tax reliefs/concessions pursuant to proceedings under Insolvency and Bankruptcy Code, 2016, Deferral of Income Computation and Disclosure Standards, Supply of service within the same legal entity from one vertical or division or office to another for use/consumption in the same legal entity should not be made liable to GST, Suitable amendments in the GST law be made to allow ITC on all expenses incurred for business purpose without any restrictions, Place of supply of service provided by Intermediary should be considered as the location of recipient of service, clarity on various open issues with detailed guidelines be provided with prospective effect at the earliest in respect of anti-profitteering provisions etc.

<http://www.ficci.in/publication.asp?spid=22927>



India's Quest: Targets for the Decade

India remains among the fastest growing large economies of the world. The new sense of direction given to the Nation by Prime Minister Shri Narendra Modi's call to build a "New India", balancing the imperatives of economic growth and the assurance of well-being of all citizens, will require a sustained focus on the nation's development agenda. FICCI has marked its 90th year with a renewed commitment to build a New India.

The book on India's Quest was initiated with a view to chart out the agenda for the next decade, when FICCI would celebrate its Centenary. With the objective of identifying India's development challenges over the next decade we reached out to experts and leaders across various fields - manufacturing, technology, tourism, social sector, arts, media and philanthropy, amongst others. The authors were asked to identify specific targets for India for the next ten years, and suggest a roadmap to achieve the same. The effort has been to bring together constructive ideas to address key challenges and unlock the true potential of India.

<http://www.ficci.in/publication.asp?spid=22925>



Sustainable Development Goals: Linkages with corporate actions in India

The Report highlights the perspective of Indian corporates on the Sustainable Development Goals (SDGs – the 'Global Goals'), as well as the role they play in supporting the goals. The Report provides answers of key corporates on questions related to engaging in the Global Goals, including the need for business for such engagement, drivers for business to support the SDGs, business opportunities arising from engaging in the agenda for Global Goals, and some of the current trends in India demonstrated through examples of leading practices and resulting impacts from some of the FICCI member companies.

The Report consists of an extensive analysis on corporate perceptions and actions on the Global Goals in India, the preparedness level of Indian corporates for the quest for Global Goals, strategies and steps that companies intend to take going forward, and some of the key barriers. From the FICCI member companies the feedback received, 85% of them are working towards the SDGs that are directly linked to their business. India has framed its development roadmap focussing on the priority issues of employment, economic growth, food, water and energy security, disaster resilience and poverty alleviation. The SDG agenda is an excellent opportunity to further integrate the issues like climate change, natural resource scarcity and inequality into the Country's development plan.

<http://www.ficci.in/publication.asp?spid=22950>



Informal Economy in India: Setting the Framework for Formalisation, 2017

The study on Informal Economy in India is a survey based study that assesses the key reasons why enterprises remain informal, their perception with respect to entering the formal economy, issues and challenges faced by them and to arrive at policy recommendations to encourage greater formalisation.

Global case studies like that of Chile, Brazil, Colombia, Sri Lanka, etc. have been studied to identify innovative policy interventions for formalisation. A targeted framework of policies for formalisation in India has been designed based on the survey findings and study of various policy solutions across countries.

<http://www.ficci.in/publication.asp?spid=22998>



Re-imagining India's M&E sector

The report presents the trends of the Media & Entertainment Sector for the last one year. The report highlights that the Indian economy is growing and the Media and Entertainment (M&E) sector is a reflection of this. The year 2017 saw India recover from demonetisation only to face new challenges and opportunities provided by the implementation of GST. However, the Indian economy continued on its growth trajectory and so did the M&E sector. Favourable demographics, a rise in consumer income and a huge demand for knowledge, escapism, sports and news aided the growth of the M&E sector in the country. The other key insights presented in the report include:

- Subscription growth outpaced ad growth in 2017
- Advertising growth will accelerate till 2020
- Digital advertising led the overall ad industry growth
- Better times are expected for the print advertising
- Global adoption of high budget Indian films is driving faster growth
- New category of digital subscribers is expected
- Online gaming industry is at an inflexion point
- India increased its attractiveness as an outsourcing hub
- The M&E sector grew faster than the GDP
- The proliferation of digital infrastructure will enable shifts in consumption patterns which will lead to new customer segmentation.

<http://www.ficci.in/publication.asp?spid=22949>



M2M - changing lives of 130 crore+ Indians

The report covers various facets of the machine-to-machine (M2M) ecosystem and addresses the issues and challenges faced by the stakeholders. It provides key inputs and recommendations to overcome some of the impediments to M2M growth in India and to aid in policy formulation.

A progressive and supportive M2M policy framework would go a long way in realizing the connected India vision. India should take every possible step to be in line with global practices in M2M. The report assesses the current global M2M trends and policies and tries to provide a holistic view on the current scenario, key challenges and drivers.

<http://www.ficci.in/publication.asp?spid=22943>



Blockchain: The next innovation to make our cities smarter

The report on Blockchain: the next innovation to make our cities smarter provides a broad understanding of the current urban challenges being tackled through smart cities. The report highlights one of the new technology breakthroughs—blockchain and analyses its transformative potential in making our cities smarter. Further, it explores multiple uses of the blockchain technology in the smart city domain and explains the prerequisites for the adoption of a blockchain-based solution and the way forward.

<http://www.ficci.in/publication.asp?spid=22934>



Structural Framework for Accessible Urban Infrastructure in Smart Cities

The report on Structural Framework for Accessible Urban Infrastructure in Smart Cities, studies the infrastructural framework proposed in select cities, which are to be developed as Smart Cities, and recommends the reference framework for building accessible Urban Infrastructure in Smart Cities.

<http://www.ficci.in/publication.asp?spid=22933>



Ease of Doing Business in India

This report will look at initiatives taken by the government with relation to Ease of Doing Business that will help the Direct Selling Industry in India and analyse the implications of the reforms taken by government for the Indian Direct Selling Industry and recommend a way forward to ease the doing of business so that the industry may reach its full potential and provide self-employment opportunities to millions in the country. FICCI is hoping that this report can provide insights and actionable recommendation for putting together a conducive legal environment for the industry.

<http://www.ficci.in/publication.asp?spid=22924>



Indian Non-Ferrous Metals Industry: Way Forward

The report covers current issues faced by industry stakeholders in primary and secondary downstream segments, and explores potential remedies. The report also briefly covers the historical growth path of non-ferrous metal industry in India, its current trends and how the industry is likely to shape up in the near future, inter-alia outlining major recommendations that can help further accelerate the industry's growth. The report is focused upon four key non-ferrous metals i.e. aluminium, copper, lead and zinc.

<http://www.ficci.in/publication.asp?spid=22947>



Trends & Opportunities for Indian Pharma

The whitepaper captures the key trends across the global & domestic markets and supply landscape, and the imperatives for the Indian Pharmaceuticals industry. It also lays out areas where support that the government and regulatory agencies need to provide to bring the industry back on the growth trajectory of the past. How do Indian pharmaceutical companies refine their strategy and re-orient their business model to embrace these challenges? What are the key imperatives for in the industry? How do the players go about building the next-age capabilities? These are some of the questions that still need to be answered. This whitepaper is a step towards answering some of these questions.

<http://www.ficci.in/publication.asp?spid=22944>



Distribution 2.0 - Improving Distribution in Health Insurance

Health Insurance is a key pillar not just for a family's physical health, but also for their financial well-being. It enables access to appropriate health care while reducing the impact of an untoward health event on a family's earning and payment capacity. However, in India health insurance remains underpenetrated, and expensive in the eyes of consumers.

FICCI stated that "India stands apart from most other countries on account of its diversity, across practically every parameter, whether it be age, socio-economic distribution, education levels, financial literacy, wellness, geographical spread or even growth rates across different parts of the country. This only make it more challenging for the insurance industry to ensure that appropriate products and distribution systems are in place to cater to each customer's need."

<http://www.ficci.in/publication.asp?spid=22929>



Healthcare in India

The Indian healthcare industry is driven by out of pocket expenditure at 62 per cent of the entire expenditure. Health cover is provided to only 27 per cent of the population while remaining 73 per cent is uninsured. The health insurance industry, caters largely to institutional treatment which leaves considerable opportunities in outpatient treatment. With medical inflation at ~15 per cent has created a strong need for developing a health savings account product combined with a robust health insurance plan in order to bring in spend efficiencies and protection for the Indian population.

It is suggested that a Health Savings Account (HSA) scheme linked to a high deductible health insurance cover is introduced in the country to allow end-to-end healthcare coverage.

<http://www.ficci.in/publication.asp?spid=22928>



Health Insurance penetration in MSMEs

The MSME sector of the country is highly under penetrated in terms of healthcare cover. Hence, this segment offers a great opportunity for the health insurance industry to expand its outreach and increase accessibility to affordable healthcare. As approximately 90 per cent MSMEs do not offer any financial aid for medical purposes to the families of employees. They prefer a basic cover of personal accident and critical illness with a focus on a reduction in premiums and coverage of employees only. MSMEs primarily prefer to purchase insurance through broking channels and bancassurance, with group health insurance penetration through online channels at minimal level of about 6 per cent.

FICCI stated that "While the Government could play a pivotal role in setting up the healthcare infrastructure and incentivising group health cover adoption, the regulator could explore aspects around obligations of non-life insurers. The insurance industry could explore policy customisation, innovations in servicing and cluster based communications drives. A concerted three way approach could go a long way in realising the ambition of providing healthcare coverage to a larger population base."

<http://www.ficci.in/publication.asp?spid=22930>



Leapfrogging to Education 4.0 - Student at the Core

Paper on "Leapfrogging to Education 4.0 - Student at the Core" takes the reader through the evolution of Education and suggests a roadmap to adopt and adapt to the change. The HE system in Education 4.0 will focus on the learner, supported by technology,

in-person guidance and industry-relevant content to meet the learner's individual learning needs. The report provides some pointers as to how Higher Education institutes of today prepare themselves to the changing paradigm of education. It also profiles some good practices of countries and institutes that we consider are ahead of the curve in their intent and execution. It explores how the current university model might evolve to keep pace with the changing paradigm and advent of Education 4.0 in the near future.

<http://www.ficci.in/publication.asp?spid=22956>



Social Outreach in Higher Education

The report is a result of the reflections on the value, relevance and importance of social outreach in higher education, aims to provide practical action-points on how HEIs can achieve meaningful social outreach. It brings out the differences between 'traditional' social outreach models followed by universities for decades, and 'new-age' social outreach practices, which characterise the progressive higher education models the nation wants to build. It is a handy reference for all university administrators, faculty and the policy sector on how to put futuristic and innovative models of social outreach in practice in regular higher education curriculum.

<http://www.ficci.in/publication.asp?spid=22957>



Visual arts industry in India: Painting the future

The Indian visual arts space has developed significantly over the last several years. The Indian art market was estimated at around INR15.8 billion in 2017, having witnessed a middling y-o-y growth of 6 per cent. Indian visual arts industry is mired in a number of challenges, a critical one being the lack of art infrastructure. There

is an urgent need to build new public art infrastructure and retrofit the existing ones in place. The Indian visual arts industry holds great promise. Assets of HNWLs in India are expected to reach USD2.3 trillion by 2020, thereby indicating a large opportunity for the growth of the Indian visual arts industry. In addition, a host of other major factors including improving infrastructure, better awareness of art, increasing private sector participation, technology adoption, better discovery platforms for art, etc. can drive demand in the visual arts space.

<http://www.ficci.in/publication.asp?spid=22945>



StartUps - Transforming India's Food Processing Economy

The report highlights the current scenario of food StartUps in India and further linking it to The StartUp Ecosystem in India and Recommendations for boosting the food StartUp ecosystem in India. The report also captures case study from food Startups in the country. The report cites that a robust regulatory environment can enable a favorable macro-economic environment to nurture the growth and development of technology-based startups. The government has also taking into consideration this trend and it is expected that 'Startup India' will facilitate this growth and development by putting in place the right steps towards creating a nurturing ecosystem for startups.

The report also captures the modes of various StartUps; Segments of Activity in the Food Processing StartUps Domain and startup ecosystem in India which would provide an overall perspective of the StartUps ecosystem. The report captures the case study from various StartUps highlighting the issues and challenges faced by them in the initial days and how they were able to resolved it.

<http://www.ficci.in/publication.asp?spid=22941>



Accelerating Agriculture Insurance

The vagaries of the weather still pose threat to farmers across the country which largely affects the agricultural productivity. It is estimated that over 50 percent of the total population of the country is engaged in agriculture and a majority of them are still dependent on monsoonal rain for irrigation. Indian Monsoon has

a direct relationship with the global climate change, which is evidently showing impact across the country in form of fluctuations in climate. Huge variations in the climatic conditions make it challenging to tackle the menace of climate change especially related to key environmental parameters such as temperature and rainfall.

In recent years, the erratic and unpredictable behavior of Monsoon, accentuated by Climate Change has caused extensive financial losses in terms of crop failures, damage to agricultural infrastructures, loss of lives and properties etc. due to natural and manmade disasters and destruction to environment and farmlands. This has aggravated food insecurity in the country. In order to combat this challenge, there is a need to adopt a strategy which may provide comprehensive solution to farming communities for safeguarding agricultural productivity. Crop Insurance is one such area which is gaining momentum in the contemporary scenario. This report discusses well-structured strategies to combat the challenge of agri-risk in the country and also provides important inputs for policy interventions in the Agriculture insurance sector.

<http://www.ficci.in/publication.asp?spid=22946>



Compendium of Best Practices: Recognizing excellence in water management and conservation

FICCI Compendium of Best Practices in Water Conservation and Management documents the best practices of the industries and NGOs awarded in the FICCI Water Awards. The Compendium is a

compilation of the award-winning case studies which identifies opportunities to reduce water use while achieving the aspirations of growth. It also aims to raise awareness on the scale and urgency of the water challenge facing the industrial sector in India and facilitate the engagement of new stakeholders in the discussion on the future management of water.

The various categories of the FICCI Water Awards address crucial issues: ways to reduce water consumption by suppliers and purchasers up and down the supply chain; working towards the goal of zero discharge; what best practices need to be adopted to recycle and reuse water by lowering toxic and other contaminants and changing production processes to be more water efficient; encouraging water conservation and improved water management systems by the non-governmental groups; and how small and medium sized enterprises can be assisted to improve water management using innovative practices.

<http://www.ficci.in/publication.asp?spid=21005>



Future of Jobs

Future of Jobs in India – A 2022 Perspective is a first exhaustive India specific research study on the future of jobs, examining the five key sectors of the Indian economy in detail (IT-BPM, retail, textiles & apparel, automotive and financial services). This report is based on the extensive survey of 100 plus Indian CXOs across

these 5 industry sectors. This report takes a holistic perspective and analyses the primary causes of disruption and how they are giving rise to a range of megatrends that are transforming Indian job landscape. Based on multiple rounds of interaction with relevant stakeholders, this report has analysed the fundamental causes of the emerging transformative trends and, consequently, has identified three primary forces behind this current disruption: globalization, demographic changes and adoption of exponential technologies by Indian industries.

<http://www.ficci.in/publication.asp?spid=22951>



Employer led models of job creation

This document is the result of a collective vision of FICCI Skill Development Committee and its efforts to understand various “employer led models” of job creation which have the potential of creating more employment opportunities. At the backdrop of growing adoption of exponential technologies, government has taken cognizance of the need to focus on labour intensive sectors and to boost entrepreneurship. Through this report, FICCI's attempt is to catalyse and recognize people or organizations which have created better employment opportunities.

<http://www.ficci.in/publication.asp?spid=22952>



ASCC Framework for Sports and Physical Education in Schools

Sports, Education and Health are intrinsically linked to each other and together contribute significantly to human resources development, particularly youth development, in a holistic manner. Physically Educated person is not just a well-rounded person from health and physical well-being point of view but is also a responsible social citizen. As the ongoing process of recognising the importance of Physical Education and Sports in Schools towards building a generation of children with good health, fitness and right life skills, a detailed whitepaper on "Active School, Active Communities, Active Child (ASCC) Model: Guidelines for Policies, Process, and Practice" has been prepared by FICCI and fitness365 for further action in this regard for making Physical. Education and Sports as the core to teaching methodology in Schools and integrate it in all aspects of Education.

<http://www.ficci.in/publication.asp?spid=22940>

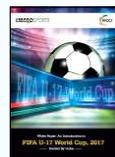


India and Europe 29 : Synergising Economic Vision For Expanded Economic Relations - A Knowledge Report

In this report titled India and Europe 29: Synergising Economic Vision For Expanded Economic Relations, India's economic and business ties with E29 countries have been assessed against the backdrop of the current global economic scenario.

The report through different chapters highlights the global economic recovery which is expected to have a positive bearing on bilateral India-E29 trade and investment flows; the myriad avenues for expanded bilateral India-E29 trade relations; India's rise to pre-eminence as a key investment destination; Indian government's mission to spread and deepen e-governance and digitisation of the Indian economy and society; new avenues for India-E9 partnerships keeping with India's Smart Cities Mission; adoption of telemedicine, tele radiology, hospital information systems (HIS)/hospital management information systems (HMIS), EMR, etc in Indian healthcare sector and the bilateral partnership opportunities in the realm of skill development and training, especially in the wake of the thrust on Industry 4.0.

<http://www.ficci.in/publication.asp?spid=22948>



White Paper: An Introduction to FIFA U-17 World Cup 2017 Hosted by India

This is an interesting time for the Indian football industry, and the recent success of the FIFA U-17 World Cup was a good addition to the portfolio of India as a sporting destination. Following on from the tournament, there has been a visible change in perception of football in the country and the various stakeholders of the game have taken note of the same.

The growing popularity of the game provides new and diverse opportunities for entities to grow their presence in football. Stakeholders are beginning to see real value in the sport and for the first time, they see a possible return on the investments made in the football industry.

FICCI is committed to facilitating trade and business opportunities in the thriving Indian sports industry. Football is seen as a key sector by FICCI and we firmly believe that the future holds great things for the football industry in India.

We are pleased to present the report on Legacy of the FIFA U – 17 World Cup (Focus on New Business Opportunities) and are confident that the report will provide a valuable insight into the tournament's success and legacy for the football industry in India.

<http://www.ficci.in/publication.asp?spid=22939>

UPCOMING EVENTS

Entries invited for AIOE "National Award for Outstanding Industrial Relations" 2016-17

March 26, 2018, FICCI, New Delhi

Conference on Sharing of Best Practices: Improving Maternal, New Born and Child Health through CSR

March 28, 2018, FICCI, New Delhi

Training Program on Technology for Impactful CSR Project Management

April 12-13, 2018, FICCI, New Delhi

India Pavilion at Interphex

April 17-19, 2018, Javits Center, New York City, USA

National Conference on Export Control

April 18, 2018, FICCI, New Delhi

The Great Indian Travel Bazaar

April 22-24, 2018, Jaipur, Rajasthan

Procurement 4.0 - Reforming the Frameworks

April 25, 2018, FICCI, New Delhi

ISC-FICCI Sanitation Awards & Conclave 2018

April 26-27, 2018, FICCI, New Delhi

India Telecom 2018

April 27-28, 2018, New Delhi

FICCI Technology Led Business Delegation to the United States

May 01-05, 2018, San Diego & Silicon Valley, CA

Circular Economy Symposium (CES) 2018

May 14-15, 2018, FICCI, New Delhi

India Pavilion at Hospitalar Brazil 2018

May 22-25, 2018, Expo Center Norte - Sao Paulo, Brazil

Homeland Security 2018 - Cyber Crime Management

May 23-24, 2018, FICCI, New Delhi

India Pavilion at Africa Health

May 29-31, 2018, Gallagher Convention Center, Johannesburg, South Africa

Technotex 2018

June 28-29, 2018, Mumbai, Maharashtra

Annapoorna - World of Food India 2018

September 27-29, 2018, Mumbai, Maharashtra

India Chem 2018

October 04-06, 2018, Bombay Exhibition Centre, Mumbai

India Promach 2018

October 04-06, 2018, Bombay Exhibition Centre, Mumbai

Indian Conference on Life Cycle Management (ILCM) 2018

October 04-05, 2018, FICCI, New Delhi

India StoneMart 2019

January 31-February 03, 2019, Jaipur, Rajasthan



INDUSTRY'S VOICE FOR POLICY CHANGE

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WE ANALYZE

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