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KNOWLEDGE PAPERS

Series 2/2020



FICCI Guide for Organisations to follow under COVID-19 Pandemic

FICCI released a Guide for Organisations to help them prepare and equip their workplaces in the wake of coronavirus outbreak. The first version of the Guide was released in March in the pre-lockdown period, which included guidelines for infection prevention and control at workplaces as well as essentials for business planning and working remotely, along with some important advisories and information-education material.

<http://www.ficci.in/publication.asp?spid=23192>



FICCI Guide 2.0 for Organisations during COVID-19 Pandemic

FICCI released the second version of the Guide for Organisations to help them prepare their workplaces during COVID-19 pandemic in April during the lockdown period. It included basic measures for infection prevention and control as well as guidance on what to do, if someone suspected or confirmed to have COVID-19, has been to the workplace. The guide also incorporated information on COVID-19 scenario, its economic impact, emerging New Normal, along with business advisories, key advisories and orders issued by the government as well as educational content.

<http://www.ficci.in/publication.asp?spid=23209>



Impact of COVID-19 on Indian Economy

The report covers the impact of the Covid-19 pandemic on Indian and Global Economy. It highlights how the economies worldwide have witnessed large scale disruption on both the supply and demand side variables, with economic activity coming to almost a complete halt bringing huge losses for industries and severe difficulties for common people. It narrates in details how global supply chains were affected by the coronavirus outbreak in China and how international traded was affected as the coronavirus spread to most leading countries including the US, UK, countries of the European Union like Italy, Spain, France, Germany as well as Asian economies like Japan, South Korea and India. The report discusses the projections given out by leading international organisations like OECD, UNCTAD and IMF on the outlook of global and Indian economic growth in year 2020 and 2021.

<http://www.ficci.in/publication.asp?spid=23195>



COVID-19: Impact on Indian Industry, Issues and Suggestions

The report captures the various difficulties faced by the Indian industry due to the spread of coronavirus in the country and the subsequent precautionary measures adopted including the lockdown of several cities as part of the government's containment exercise. Challenges faced by each of the sectors of the economy are highlighted separately in the report to present a clear view of the extent to which each sector has been impacted due to the economic slowdown observed in the country. Keeping in view the various macro level problems of the industry, a set of suggestions are given for the RBI and the Government. To address the specific issues of the sector, the report has presented sector-wise recommendations as well.

<http://www.ficci.in/publication.asp?spid=23196>



Part II - Supplementary Note on Impact of COVID 19 on Indian Industry Issues and Suggestion

As coronavirus continued to spread unabated across various parts of India, the sectors started witnessing more and more challenges. To capture the new challenges faced by the various industry constituents and to present suitable recommendations to resolve the issues, the new report was developed as a supplement to the original report – 'COVID-19: Impact on Indian Industry, Issues and Suggestions'.

<http://www.ficci.in/publication.asp?spid=23199>



Part III - Supplementary Note on Impact of COVID-19 on Indian Industry Issues and Suggestions

This is the second supplementary note developed to also highlight the new issues that the industry started facing not only due to continuation of the Covid-19 outbreak in the country but also as a result of some of the measures and processes introduced by the government like giving permission for production and supply of essential commodities and services across states.

<http://www.ficci.in/publication.asp?spid=23201>



The Era of Consumer A.R.T. - India's Media & Entertainment sector

The Indian Media and Entertainment (M&E) sector reached INR1.82 trillion (US\$25.7 billion) in 2019, a growth of ~9% over 2018 states the FICCI EY report 'The era of consumer A.R.T. – Acquisition Retention and Transaction,' launched today. With its current trajectory, the M&E sector in India is expected to cross INR2.4 trillion (US\$34 billion) by 2022, at a CAGR of 10%.

While television and print retained their positions as the two largest segments, digital media overtook filmed entertainment in 2019 to become the third largest segment of the M&E sector. Digital subscription revenues more than doubled from 2018 levels and digital advertising revenues grew to command 24% of total advertising spend.

<http://www.ficci.in/publication.asp?spid=23200>



Entertainment Law Book 2020

FICCI-CAM Entrainment Law Book 2020 presents regulatory developments in the field of TV broadcasting and distribution, music, radio, filmed entertainment and other segments in the Media & Entertainment space. It also includes several thought provoking articles on diverse topics, dealing with the issues in the Media & Entertainment sector. It is the report jointly produced by FICCI and Cyril Amarchand Mangaldas.

<http://www.ficci.in/publication.asp?spid=23226>



COVID-19: Implications on Regional Industry and Economy

Regional economies of Punjab, Haryana, Himachal Pradesh & UT Chandigarh have not remained outside the impact zone of COVID-19. The nation-wide lockdown, that was imposed by Hon'ble Prime Minister as a preventive measure against infection and virus transmission, costed the region its industrial stability and growth prospects with factories shut, supply-chain disrupted and the cash flows plummeting at an all-time low. In an attempt to quantify the impact for further review and action, FICCI Chandigarh surveyed industry members across sectors. Findings are compiled in form of a report.

<http://www.ficci.in/publication.asp?spid=23233>



FICCI Standard Operating Procedures (SOPs) for Industry Post Lockdown

This report proposes Standard Operating Procedure (SOP) for different industry sectors to start functioning after the lockdown. This report proposes some Generic SOPs for Manufacturing Units and Distribution Centres, followed by sector specific SOPs. In addition, there is a check list for businesses before they start operating post lockdown.

<http://www.ficci.in/publication.asp?spid=23204>



COVID-19 Impact assessment for private healthcare sector and key recommendations on financial measures required for the sector

Private healthcare sector has been at the forefront of the COVID-19 response and has been facing triple burden- with already strained financial health; sharp drop in out-patient footfalls, diagnostic testing, elective surgeries and international patients owing to COVID-19 and the lockdown; as well as increased investments on manpower, supplies and equipment due to COVID-19. In this context, FICCI in partnership with EY, undertook a study on the economic impact of COVID-19 on hospitals and labs. The report reveals that COVID-19 and the subsequent lockdown resulted in occupancy levels to fall to a mere 40% by late-March vis-à-vis pre-COVID occupancy levels of ~65-70%. Impact on diagnostic labs was even worse, with almost 80% fall in patient visits and revenue.

The report gives recommendations based on the below key themes:

- Liquidity infusion- Short term interest free/ concessional interest loans and Immediate 100% release of dues locked with central and state government authorities;
- Indirect tax reliefs/ exemptions/ waivers like- recoup amount equivalent to ineligible GST credits paid on procurements; Customs duty / GST exemption on essential medicines, consumables and devices for treatment of COVID patients; Extension of time under the EPCG scheme etc.;
- Income tax benefits- Nil TDS for FY21 and TDS at 5% for FY22; enabling a mechanism for adjusting the TDS and advance tax dues against pending refunds of corporates, wherever applicable;
- Deferment of Statutory liability payments;
- Rebate on commercial rate of power for a stipulated period;
- Waiver of fees on license renewal.

<http://www.ficci.in/publication.asp?spid=23205>

FICCI-Dhruva COVID-19 Business Impact Survey



The survey report has urged the government for increase in the MEIS and SEIS rates and requested a payroll support program for MSMEs to retain workers and enable them to pay wages. It also recommended to instruct all ministries and agencies to release all pending payments, make tax refunds and honour awards given in arbitration and to issue guidelines that workers not reporting to work in enterprises engaged in essential goods and services will be treated as being absent and no wages/salary to be given. The report also urged for additional working capital from banks without collateral to enable business continuity and clear communication with industry and local authorities for enabling businesses to run operations without hindrance as logistics and transportation management is key. The government should plan for dedicated manufacturing clusters with end to end value chain for products with high import dependence and offer liberal tax concessions and incentives and minimal regulation.

The report also recommended to increase FDI caps in sectors like insurance and no penalties for delayed statutory payments including tax payments [GST]. It also suggested to waive off minimum charges for utilities like water and electricity and charges to be based on actual usage and not demand load contracted. The government should front-end large construction projects to kickstart demand for core industries like steel, cement etc and introduce further cuts in lending rates through RBI directive to banks. The interest subvention scheme for exporters that ended on 31 March 2020, must be extended by one year and urged the Government that the credit rating should be maintained during the Covid-19 crisis period.

<http://www.ficci.in/publication.asp?spid=23210>



Industry Feedback on SOPs Annex II of MHA circular dated April 15, 2020

This exercise was conducted to capture issues faced by industry in implementing SOPs for social distancing in offices, workplaces, factories and other establishments, as notified by the Ministry of Home Affairs through annexure 2 of its order dated April 15, 2020.

It also includes remarks and suggestions received from industry in regard to resolving on-ground challenges and ensuring effective implementation of safety measures.

<http://www.ficci.in/publication.asp?spid=23224>



Feedback on Consolidated Revised Guidelines issued by MHA towards containment of COVID 19

Ministry of Home Affairs came out with the revised consolidated guidelines and procedure to be followed by commercial establishments, during the lockdown 2.0. This note was produced in view of the industry feedback on the challenges and issues faced by them with respect to the new guidelines.

<http://www.ficci.in/publication.asp?spid=23221>



High-Impact Online Learning at Scale - A White Paper

In this research-backed white paper, FICCI and upGrad lays out the case for reskilling workforces using optimal learning methodologies as the need of the hour.

Reskilling existing employees is always more economical than hiring new ones. Besides, existing employees are always more invested in the organisation's systems and processes, ethos and vision. As per the respondents of upGrad's 2020 industry-leading survey of Learning & Development (L&D) and business leaders, 87% prefer reskilling over hiring new employee.

Companies are allocating increased budgets for online learning modes, 37% of survey respondents reported that their L&D budgets have increased by over 20% in the coming year, 40% of many such budgets are going to online learning.

<http://www.ficci.in/publication.asp?spid=23214>



COVID-19 Scenario: Emerging Roles of Drones in India

FICCI suggested inclusion of drone services to government agencies and enterprises involved in fighting against COVID-19, under Essential Goods and Services. The FICCI Drone Committee recommended that Ministry of Civil Aviation (MoCA) should provide blanket exemptions to law enforcement agencies, public safety and emergency response agencies and critical security agencies and enterprises during COVID-19 lockdown to use drones to augment available manpower and prevent risk of human life till 31 December 2020 for specific use cases. It also suggested sector-wise exemptions for use of drones for supportive activities (agriculture and enterprises) to revive the Indian economy. FICCI also recommended to re-enable voluntary disclosure of non-compliant drones flying in India. Re-enabling the voluntary disclosure till 30 June 2020 will allow many drone users to legally register the drones in their possession strengthening the visibility into the ownership of such drones.

<http://www.ficci.in/publication.asp?spid=23223>



Strengthening operational resilience and cyber security during the COVID 19 crisis

As you are aware that, the spread and severity of the COVID-19 crisis across the globe have pushed countries and enterprises into uncharted territory. A new normal has emerged wherein there is a need for steep change in digitalization and resilience considerations across industries and government functions.

However, most enterprises are facing challenges due to increased network traffic, potential cyber-attacks, reduced capacity and so on.

During this time, enterprises, government departments and even common man need to strengthen their cybersecurity posture as they face an evolving threat landscape caused by the rapid transition to remote working. Considering the importance of the same, FICCI in association with EY India has come up with a brief report on "Strengthening operational resilience and cybersecurity during the COVID-19 crisis". The ephemeral note provides specific actions that could be considered by the IT, technology and security functions of enterprises, and government bodies to protect themselves along with ensuring smooth operations in this rapidly changing and risky cyber landscape. It further guides messages that should be passed on to the end-users working remotely.

<http://www.ficci.in/publication.asp?spid=23215>



Note on exit strategy of lockdown

Note on Exit Strategy of Lockdown is aimed at bringing a fine balance that on one hand normalizes economic and social activity and on another hand contains the disease from spreading and getting out of control. This note contains recommendations on how government could look at exit from lockdown in a graded manner after April 14, 2020, an open certain economic activities.

<http://www.ficci.in/publication.asp?spid=23208>



Recommendations for Opening of Economic Activities post Lockdown 2.0

FICCI created a comprehensive document containing recommendations for the government on what all economic activities need to be opened up, post lockdown 2.0. The report was created by taking a balanced approach of saving lives and creating livelihoods. The report also highlighted the sectoral challenges and issues that industry is facing, and carried suitable suggestions for the same.

<http://www.ficci.in/publication.asp?spid=23222>



Back to Business Survey & Recommendations for Opening of Economic Activities Post Lockdown 3.0

Guidelines on Lockdown 3.0 notified by Ministry of Home Affairs on May 1, 2020 provided more relaxations to businesses by lifting many restrictions. However, many organizations across sectors were still facing on-ground issues. FICCI conducted a 'Back-to-Business Survey', which assessed the on-ground state of businesses and captured views of various stakeholders on resumption of economic activities. This report is primarily based on analysis of the survey results, and includes suggestions from industry mapped with on-ground issues related to implementation of lockdown guidelines in various sectors and states.

<http://www.ficci.in/publication.asp?spid=23235>



Challenges & Potential of Doing Business for Indian Companies in Germany

The study is based on a survey of Indian companies operating in Germany, and gathers first-hand information on the operational challenges they face: Recruitments, Visa, Taxation, Payroll etc. The other important challenge they face is inter-cultural differences, and this particularly impedes their growth.

One of the key elements of the findings is its reflection on how Germany's need for digitisation, especially from Mittelstand, is acting as a key driver behind growing interest of India's Information Technology (IT) companies in this market. At the same time, the recent trend is more towards new age technologies such as Artificial Intelligence (AI), Internet of Things (IoT) and 4IR, and are attracting several start-ups from India. This emerging trend hints towards successful realisation of the innovative collaboration potential that the two democracies have.

The Key take-aways of the report are as follows:

Indian companies are highly interested in the German market. Especially IT products and services are one of the areas of expertise of Indian companies and Germany needs these experts.

The current political situation in some European countries and the attractiveness of the German market are two factors which convince Indian companies to invest. Furthermore, Germany's central location at the heart of Europe makes it a good geographical and economic centre for further expansion into the European market.

<http://www.ficci.in/publication.asp?spid=23193>



INDUSTRY'S VOICE FOR POLICY CHANGE

Federation of Indian Chambers of Commerce and Industry, FICCI

Federation House Tansen Marg, New Delhi - 110001

Phone: 23738760-70 (11 Lines), Fax: 23320714, 23721504

E-Mail: ficci@ficci.com, Website: www.ficci.in



For more details contact at tripti.kataria@ficci.com

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