



KNOWLEDGE **PAPERS**

Series 2



Consistency, Quality, and Resilience: The Next Frontier for Productivity Excellence

FICCI-IBA-BCG Report was released at FIBAC 2013 held on 13th -14th August, 2013 in Mumbai.

The report has been a result of extensive surveys carried out by BCG along with FICCI for Corporate Survey and IBA for the Banking Survey.

Banking survey was the survey of 38 largest public, private and foreign banks in India and formed the basis for benchmarking productivity of the Indian banking industry amongst themselves and their global peers.

On the other hand, corporate survey was the first of its kind and was facilitated by FICCI, of its members. The survey of around 500 corporates captures structured feedback from corporates on Indian banks and feedback on the services offered by their banks. The survey successfully captures corporate India's definition of their primary bank, their perceptions on what the banking sectors' strengths are and what are the areas that require improvement.

<http://www.ficci.com/publication-page.asp?spid=20293>



India Manufacturing Barometer Taking the pulse

In an environment of sluggish economic growth, and deceleration of the manufacturing sector, it is not surprising that the mood exhibited by companies appears cautious. Companies appear to have battened down their hatches and are preparing for a period of uncertainty. New investments seem to have been put on hold, with half of the companies surveyed indicating that they had no plans for major investments in FY14.

Encouragingly, however, it appears that the sector is using this period of comparatively sluggish activity to realign the business models and prepare for the future. Much of the focus of new investments is on new product introduction and on R&D initiatives aimed at improving product portfolio and mix to increase margins. In the light of a challenging economic environment, companies are also re-evaluating customer propositions and relationships. While adding value to the core product and focusing on longer-term and profitable relationships with customers.

Despite uncertainty related to economic conditions, and continued constraints to growth, companies seem to believe that the market may have 'bottomed out', with GDP growth in FY14 expected to be higher than in the previous year. Further, the companies surveyed appear confident about their prospects for growth, with more than 50% largely expecting their revenues to grow at higher than 10% over the next year and profit margins to improve. The report covers the above aspects and more.

<http://www.ficci.com/publication-page.asp?spid=20279>



FICCI Battelle Knowledge paper on Global R&D Summit 2013

India is emerging as a research and development (R&D) hub to several global companies. Starting 1985, many multinational companies have set up their R&D units in the country and continue to do so - despite India's low rank in most global benchmark indices such as Global Innovation Index and Ease of Doing Business index. So what makes India a good destination for R&D? This knowledge report attempts to provide an answer to this question by deciphering some of the compelling reasons as to why foreign companies continue to consider investing in the country in spite of its myriad challenges. The report begins with examination of key factors that companies think make India a desirable location for R&D and the important role played by government institutions in formulating programmes that will help India achieve the required growth in R&D..

<http://www.ficci.com/publication-page.asp?spid=20284>



FICCI Solar Energy Task Force Report on Securing the Supply Chain for Solar in India

FICCI believes that the creation of a strong and secure supply chain for solar in India will enable creation of jobs, reduce foreign exchange outflow and lead to increase in investments and sustainable growth of the sector in the long run.

There is a need to create domestic supply chain with help from both domestic and global players. There is also a strong case for international companies with technology and global experience to participate in building a strong supply chain for solar energy in India. The report – **Securing the Supply Chain for Solar in India** – presents key recommendations on building a strong supply chain by prioritizing the indigenization of certain parts of the value chain and rationalizing the incentives for others. This report will be useful for policymakers to evolve appropriate mechanisms and help shape policy in this direction.

<http://ficci.com/publication-page.asp?spid=20294>

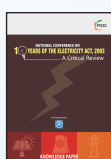


FICCI Solar Energy Task Force Report on Financing Solar Energy

FICCI believes financing is an important pillar for the success of solar energy in India and needs to be addressed with a sense of urgency to enable the objectives of the National Solar Mission to be achieved. The FICCI Solar Energy Task Force has therefore taken up this key issue with high priority and has set up a Solar Financing Subgroup to deliberate and recommend solutions for channeling cost effective finance to this sector of national importance.

The report on Financing Solar Energy provides policy recommendations to enable low cost financing and greater accessibility to finance for Solar Energy projects in India. The paper also highlights the barriers to financing for solar energy projects, the financing needs of the sector based on base case and best case scenarios, and the solutions to channel cost effective finance to the sector.

<http://www.ficci.com/publication-page.asp?spid=20295>



National Conference on 10 Years of The Electricity Act, 2003: A Critical Review

The Electricity Act, 2003 (the Act) came into existence in June 2003 to modernise the legal framework for India's power sector. One of most comprehensive laws of the country, the Act consolidates the erstwhile laws relating to generation, transmission, distribution, trading and use of electricity. It also includes measures conducive to development of the electricity industry, by promoting competition therein, protecting the interest of consumers, rationalization of electricity tariff, ensuring transparent policies regarding subsidies, etc. The Act aimed to bring about a qualitative transformation of the energy sector through a new paradigm and is a mixture of concrete changes and mandates for future policy changes.

The Knowledge Paper for the conference provided the background giving the intent of the Act. It outlined the role and responsibility of each stakeholder – governments (centre and states), regulators, state-owned utilities, financial institutions, private companies, traders etc as envisaged by the Act. The Knowledge Paper also recognised the achievements of the power sector, identified the areas where the sector failed and also suggested some immediate corrective steps.

<http://www.ficci.com/publication-page.asp?spid=20285>



TCS-FICCI - Massmerize 2013, Adapting to the Multi-channel Customer

FICCI knowledge paper entitled "Adapting to the Multichannel Customer – A Roadmap for Integrated Multichannel Retailing" has outlined a holistic roadmap for Retail & FMCG industry covering aspects on strategy, operations, organization, processes and systems. Through

the approaches outlined in the paper, retailers can fully leverage the potential of all the contemporary channels accessible to the Indian consumers, namely; Brick & Mortar stores, Digital and Mobile. FICCI believes that the advantages of this approach are as follows:

1. Defining operating strategy and model – leads to right governance and cross channel collaboration
2. Shaping customer experience – leads to seamless shopping behaviour across channels
3. Deploying processes and systems – leads to one view of the customer, inventory and orders across channel

Going forward, these steps must be repeated on a regular and consistent basis to adapt to a truly holistic integrated multi-channel way of retailing. International best practices highlight this, through numerous examples covered in the Paper. The paper has even outlined a list of 21 key metrics that organizations need to track to measure the success of their Integrated Multi Channel Retail(IMCR) initiatives. The paper reiterates that advent of IMCR is imminent as the multi-channel consumer has already emerged and the best way to make the most of this opportunity is by having an integrated approach that binds together an organization's proposition to its customers in a seamless manner. The time to realign and redo the traditional channel-silo model is now. IMCR is the new normal.

<http://www.ficci.com/publication-page.asp?spid=20296>



FICCI Water Awards Compendium

FICCI Water Mission has been working with member industries to increase awareness on water conservation and develop a long term programme focusing on water efficiency. Through research, advocacy, awareness creation and best practices sharing, the Mission is working to make industry more responsive in managing our scarce water resources. Under the auspices of the Water Mission, FICCI, in

association with HSBC, has instituted an annual Water Awards. These Awards recognize efforts by Indian industry in areas of water efficiency, management and its conservation. The documented entries serve as a knowledge base on sustainable water management practices adopted by different stakeholders and the innovations in water conservations and treatments. The report - FICCI Water Awards Compendium is a collection of best practices adopted by various companies under the three categories – Industrial Water Efficiency, Community Initiatives by Industries and Innovation in Water Technology. The case studies depict the wide range of initiatives Indian companies are taking to conserve water resources. Initiatives adopted range from integrated watershed management, rainwater harvesting; wastewater treatment; water audits and technology modification for reduction in freshwater consumption and reuse of wastewater.

<http://www.ficci.com/publication-page.asp?spid=20289>



Knowledge and Strategy Paper Released at Indian Agrochemicals Industry

With nearly a 1.2 billion population, India requires a robust, modernized agriculture sector to ensure the food security for its population. Scope for further increasing cultivable land is limited. Pesticides or Agrochemicals are recognized as an essential input for increasing agricultural production and preventing crop loss before and after harvesting.

The Third National Conference on Agrochemicals was organised jointly by FICCI, Departments of Chemicals & Petrochemicals, Department of Fertilizers and the Department of Agriculture & Cooperation, Government of India on July 30-31, 2013 at New Delhi, to discuss issues of this important sector of Indian Chemical industry, as covered in this knowledge paper.

<http://www.ficci.com/publication-page.asp?spid=20292>



FICCI PWC Study: Imperatives for Growth The Wellness Industry

The wellness market in India continued to tread its projected growth trajectory, to reach a market size of 700 billion INR in 2012. This represents a growth of more than 18% over the previous year. Products continue to comprise a majority share of 55 to 60% of the total market share.

Despite the slowdown in economic growth in 2012, the wellness industry has shown little signs of downturn as consumer spend on wellness products and services continue to be resilient. While industry prospects still remain bright, companies are fine-tuning their business and operating model in order to drive sustained revenue growth and ensure profitability.

The FICCI-PwC 2013 Wellness report captures the industry market size and its sub-segments, levers for revenue growth, levers for growth in profitability, industry challenges and concludes with the way forward and corrective measures to tackle industry concerns.

<http://www.ficci.com/publication-page.asp?spid=20288>



India-Israel Economic Partnership

This study delves into the current state of affairs between India and Israel in terms of trade, import-export, defence services, power generation, oil and gas etc and also tries to explore the trade opportunities across the different sectors, especially focusing on areas that have a mutually beneficial

trade advantage. Emphasis has also been laid on prioritizing key sectors such as defence, energy, water management, IT and ITes and tourism.

<http://www.ficci.com/publication-page.asp?spid=20286>



Background Note on 1st Economic and Business Conference of IOR-ARC Member States

The Indian Ocean Rim Association for Regional Co-operation (IOR-ARC) is a 15-year old association that was formed in 1997 to promote mutually beneficial cooperation among countries in the Indian Ocean region through a consensus-based, evolutionary and non-intrusive approach. It comprises 20 member countries which are placed along the coast of the Indian Ocean, has six countries as its dialogue partners and two associations as its observers.

The paper highlights the crucial role that IOR-ARC as an economic grouping plays in the world economy due to its diversified market, availability of substantial natural resources and for the fact that it comprises around 30 per cent of the total world's population. It outlines the trends in export and imports, trade openness of the region, investments, trade potential in the region and potential commodities to be focused in coming years.

It offers a valuable macro-economic overview of the IOR-ARC countries and their economic strengths replete with country notes carrying crucial indicators which would help immensely in the understanding of the region and its dynamics. The report provides information about the wide geographical spectrum of the region and presence of strategic sectors like mining and petroleum, diamond and other precious metals, valuable marine resources, energy sector and other natural resources.

The paper serves as a significant reference point with its exhaustive overview of areas of cooperation in vital sectors like agriculture, food processing, SMEs, infrastructure, tourism, IT, banking and financial and pharmaceuticals. It also identifies potential enablers for business development in the region like sub-regional trade agreements, investment facilitation and double taxation avoidance, institutional framework for monetary cooperation, commercial banking links and capital market integration, fund for regional projects, joint marketing and coordination in third country trading.

<http://www.ficci.com/publication-page.asp?spid=20278>

UPCOMING EVENTS

FICCI Healthcare Excellence Awards 2013

Sep 02, 2013, New Delhi

FICCI HEAL 2013: "Sustainable Quality Healthcare"

Sep 02-03, 2013, New Delhi

3rd National Conference on Energy Security

Sep 03, 2013, The Lalit, New Delhi

FICCI Business Delegation to Japan

Sep 04-06, 2013, Tokyo, Japan

FICCI Global Skill Summit 2013

Sep 04-06, 2013, FICCI, New Delhi

DST-Lockheed Martin India Innovation Growth Programme: Ahmedabad Technology Expo

Sep 06, 2013, Hotel Pride, Ahmedabad

Conference on Indo-French Seminar on Sustainable cities: Next-Generation Tramways Solutions

Sep 09, 2013, FICCI, New Delhi

PubliCon 2013: Export Markets

Sep 10-11, 2013, FICCI, New Delhi

Call for Application: FICCI Safety Systems Excellence Awards for Manufacturing-2013

Sep 11, 2013, New Delhi

Interactive Session with the President of Liberia and the accompanying Delegation

Sep 11, 2013, New Delhi

Call for application for the FICCI Corporate Social Responsibility Award 2012-2013

Sep 17, 2013, New Delhi

Effective Implementation and Internal Audit of ISO/IEC 17025 Laboratory Management System (LMS) and NABL Criteria

Sep 17-20, 2013, FICCI, New Delhi

Indian Climate Policy and Business Conclave 2013

Sep 18-20, 2013, FICCI, Federation House, New Delhi

Conference on Trade in Counterfeit, Pirated and Smuggled Goods - A Threat to India's National Security and Economy

Sep 19-20, 2013, Imperial Hotel, New Delhi

FICCI Packaging Industry Delegation to United States

Sep 23-28, 2013, Las Vegas, Chicago

FICCI Business Delegation to Malaysia & Philippines

Sep 23-27, 2013, Kuala Lumpur, Manila & Cebu

India Infrastructure Summit 2013

Sep 23, 2013, New Delhi

FICCI FOODWORLD 2013

Sep 23-24, 2013, Mumbai

Indian Life Cycle Assessment & Management Conference (ILCM 2013)

Sep 26-27, 2013, Bengaluru

IACET Approved Lean Foundation Training

Sep 26-28, 2013, FICCI, Federation House, Tansen Marg, New Delhi

3rd edition of Great Domestic Tourism Bazaar

Sep 27-29, 2013, The Lalit, New Delhi



INDUSTRY'S VOICE FOR POLICY CHANGE

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