



KNOWLEDGE PAPERS

Series 4/2017



Enabling the Transition to Electric Mobility in India

Efficiently managing the mobility of people in a sustainable manner would be a key challenge for Indian cities. Hence, a viable solution to these entwined and complex challenges lies in implementing smart mobility solutions. Optimizing e-mobility use for everyday life with greater thrust on use of public transport, e-vehicles, metro solutions and shared rides as means for mass transit could prove game-changers in addressing the issue of air pollution in urban areas.

The report highlights the way forward to accelerate electric mobility in India while addressing the key areas of shared mobility services, interoperable transport data, EV charging infrastructure and manufacturing. The report has been prepared through detailed analysis of several critical factors and global case studies influencing smart mobility.

<http://www.ficci.in/publication-page.asp?spid=20975>



Promoting Road Safety Across 4Es: The Corporate Guide

In India, the economic costs which road accidents entail are close to 3% of its GDP. A recent report released by the Indian Government claims that road accidents in India have decreased by 4.1% in 2016. The Government need to undertake many proactive measures in addressing the issue of road safety, as in the same year the road fatalities have increased by 3.2%.

FICCI believes that involving India Inc. can further boost the efforts of the government. The United Nations has proclaimed 2011-20 as the Decade of Action on Road Safety, hence there is a need for collective action by the Government, Industry and Civil Society.

The report on 'Road Safety across 4Es: The corporate guide' attempts to highlight shared responsibilities to contribute to road safety in areas on Education, Engineering, Enforcement & Emergency Care. Beyond the fundamental responsibility to keep employees safe, companies also have a clear financial incentive to improve road safety.

In addition, some of the winning entries of FICCI Road Safety Awards 2017, have been documented in this report and could be replicated by other corporates.

<http://www.ficci.in/publication-page.asp?spid=20974>



Indian private security industry Preparing for the next leap

The private security industry had traditionally been dominated by unorganised players. Despite the advent of many global, professionally managed and progressive companies in this industry, unorganised players continue to retain a significant market share by holding on to price-sensitive customer segments.

Bringing such players into the ambit of regulation is the need of the hour. The Private Security Agencies (Regulation) Act, 2005 provides the policy and regulatory framework for this industry, however enforcement of the Act remains a challenge.

This report presents an in-depth analysis of the Indian private security services industry, covering its major service segments, key players, existing policy frameworks, a comparison with global policies and amendments needed in the existing ones.

<http://www.ficci.in/publication-page.asp?spid=20966>



Smart border management: Indian coastal and maritime security

India's geostrategic location, its relatively sound economic position vis-à-vis its neighbours and its liberal democratic credentials have induced Government to undertake proper management of Indian borders, which is vital to the national security. In Central and South Asia, Smart Border Management has a critical role to play. When combined with liberal trade regimes and business-friendly environments, efficient customs and border controls can significantly improve prospects for trade and economic growth.

The traditional approach to border management i.e. focusing only on border security has become inadequate. India needs to not only ensure seamlessness in the legitimate movement of people and goods across its borders but also undertake reforms to curb illegal flow. Increased bilateral and multilateral cooperation, coupled with adoption of new technologies for border control and surveillance, and the development of integrated systems for entering, exchange and storage of data, will facilitate the movement of people and products without endangering security.

This report explores how Government can respond to border management challenges and adopt a proactive and resilient approach towards smart border management that should have four key elements: Innovation & Technology Infrastructure, Collaborative Border Management, Capacity Building and an Agile Organisation.

<http://www.ficci.in/publication-page.asp?spid=20955>



Indian Food Services Industry: Engine for Economic Growth & Employment - A Roadmap for Unlocking Growth

A decade back eating out had not been a prominent feature in an Indian's life but over the years, due to changing consumption pattern, eating out has gained momentum. This changing pattern has ensured constant growth for the Indian food services market.

Today, India represents the high priority market for global food service industry. India's food services market has come a long way from early 1980's when the number of organized brands were countable and the market otherwise was dominated by un-organized players. The revolution in this sector began in 1996 with the opening up of restaurants by McDonald's, Pizza Hut, Domino's followed by Subway, Haldiram's, Moti Mahal and Barbeque Nation etc.

The food services market has been growing since then with the international and domestic brands making substantial investments in building the back end consisting of suppliers and logistics segment. Since then, the market has witnessed many changes with respect to rising disposable income, availability of quality labour force, use of technology, which are collectively changing the face of the sector by enabling players to sustain efficiency at both front and back end.

Through the FICCI Technopak report ;' Indian Food Services Industry : Engine for Economic Growth & Employment- A Roadmap for Unlocking Growth Opportunities', we have touched upon the various trends and processes which are shaping the consumer expectations in India. A holistic view of the aspects influencing a consumer's journey – from gathering information about a product to purchase and product review – is given in the report.

<http://www.ficci.in/publication-page.asp?spid=20969>



The 'Digital First'

The report 'The Digital First Journey' outlines the journey towards a digital organization in the Media & Entertainment sector. The reports focusses on the nuts and bolts of digital media and its significance for the business of media. The report covers topics right from telling the digital story to the internal stakeholders to implementing the digital architecture on ground, each step that holds the key to survival and potentially, success in the market. The report extensively talks about OTT landscape, opportunities, challenges and monetization.

<http://www.ficci.in/publication.asp?spid=20961>



KONNECTED Consumers

In today's world of digital evolution, technological disruptions are increasingly becoming a norm in consumer industries. While these technologies make the consumers' retail journey more convenient, at the same time they also necessitate the brands to be abreast of the dynamic retail environment and keep evolving constantly to edge out the intense competition. Through the Deloitte-FICCI report 'KONNECTED to consumers', we delve into the various trends and processes which are shaping the consumer industries in India. A holistic view of the aspects influencing a consumer's journey – from gathering information about a product to purchase and product review – is provided in the report. The report further Maps the new trends of Retail, FMCG & E-Commerce Sectors.

<http://www.ficci.in/publication.asp?spid=20988>



Maharashtra 2025: Leapfrogging to a \$1 Trillion Economy

This report aims to put into perspective the goal of achieving a \$ 1 trillion economy status, as also the policy interventions required to make Maharashtra a \$1 trillion economy by 2025. Using Porter's 'Microeconomics of Competitiveness' Framework, as also the World Economic Council's 'Ease of Doing Business' frameworks, the report uses the results of a survey carried out with industry in Maharashtra's six revenue divisions- Konkan, Amravati, Pune, Nashik, Nagpur and Aurangabad. It also draws on qualitative interviews conducted with top industry leaders to understand the prospects and challenges faced in this goal.

<http://www.ficci.in/publication.asp?spid=20956>



Economy Watch

Economy Watch is a quarterly journal that provides information on key developments in the Indian and global economy. The journal is broadly divided into five sections namely 'State of the Economy', 'Expert Opinion', 'Sector Review', 'Sector Insights' and 'Global Insights'. It carries contributions from eminent academicians, economists and industry experts who share their views and suggestions on important themes. In 2017, the publication carried opinion pieces on subjects like 'consolidations of public sector banks', 'Rupee value and its linkages with exports', 'wholesale and long-term finance banks', 'universal basic income scheme', 'start-up ecosystem and financing', 'municipal bond market' etc. The journal also provides narratives on sectoral developments and in the past issues some of the sectors which have been covered include renewable energy, NBFC, microfinance, steel, retail, and e-commerce amongst others. On the global front, the publication provides key findings and recommendations of research papers brought by international organisations such as ADB, World Bank and International Monetary Fund. Some of the papers which have been covered under the global insights section of the journal include 'cyber risk, market failures and financial stability' by IMF; 'using commodities as collateral for finance' by World Bank; 'solutions for SMEs' difficulties in accessing finance' by ADB to name a few.

http://ficci.in/sector-SpPeriodicals.asp?secid=75&Periodical_Id=6006



CAPAM 2017: The Experts' Voice

This publication is a compendium of articles written by experts and members of FICCI's Capital Markets Committee and was released at FICCI's Annual Capital Markets Conference 2017. The compendium is a reflection of the recent innovations that are changing the Indian capital markets. The articles analyse the impact of the recently enacted and proposed regulations and delve into the possible solutions to some of the challenges that may arise in the near future.

<http://www.ficci.in/publication.asp?spid=20949>



Financial Foresights: Future of Jobs in Financial Services Sector

The publication focuses on 'Future of Jobs in the Financial Services Sector' and presents insightful write-ups contributed by industry leaders from across segments in the financial services sector. The financial sector landscape is undergoing a transition at a tremendous pace on account of digitization and technology diffusion.

The routine jobs are being automated and evolving trends in artificial intelligence and robotics threaten to disrupt even non-routine jobs. The emergence of newer entities such as payment banks, fintech companies, insure-tech, robo-advisory etc. are changing the way the industry works necessitating newer skills for the sector. Industry leaders have examined some of these issues and shared perspectives on the same.

http://ficci.in/sector-SpPeriodicals.asp?sectorid=3&Periodical_Id=6015



Productivity in Indian Banking 2017: Hidden Treasure - How Data Can Turn the Fortunes for Indian Banks

This report highlights some of the key productivity trends in Indian banking sector. The report underlines that MSMEs would be next growth driver for banks driven by substitution of informal credit with formal credit following reforms like GST & digital payments even as corporate credit will shrink further.

The report further highlights how banks now have to compete with alternate players such as NBFCs, Fintechs, wallets and other third party intermediaries. The reports also brings to fore that banks need to treat data as a strategic asset and prioritize technology investments that consolidate and monetize data.

<http://www.ficci.in/publication.asp?spid=20989>



FIBAC 2017 Knowledge Paper: The Experts' Voice – A compendium of articles

This publication is a compendium of articles written by experts and leaders from the Indian banking industry on the occasion of the Annual Banking Conference jointly organised by FICCI and IBA. The various authors who have contributed to this publication have shared perspectives on how the financial world in general and banking industry in particular is changing with the advent of the digital era.

<http://www.ficci.in/publication.asp?spid=20001>



Digital Rajasthan Conclave: Transforming Lives through Technology

The knowledge paper examines the surge in the implementation of digital technologies across two themes: sectors and solutions. The role of digitalization has moved beyond automation, and the evolving technologies can be utilized across various focus sectors of Digital Rajasthan, such as Health, Identity management, Citizen and service delivery, Transport, Tax and public finance, Agriculture. Governments aim to improve delivery of public services and meet citizens' expectations by considering implementation of the following emerging and disruptive technologies in their existing practices Cyber security, Blockchain, Smart cities, Internet of Things (IoT), Cloud technologies, Digital payments, Robotic process automation (RPA) and artificial intelligence (AI), Analytics. The opportunities in the digital era are limitless and without precedent. This paper explores the potential opportunities for governments to aid their digital enablement programs.

<http://www.ficci.in/publication.asp?spid=20947>



The Healthcare Consumer - Understanding Expectations & Experiences in the Patient's Journey

The Report is based on a pan-India survey of over 5000 patients from more than 150 multispecialty public and private hospitals across 6 leading metros of the country. The survey was conducted across patients seeking different treatments, socio-economic profile and demographics. One of the biggest challenges that beset India's healthcare sector is the inability to adapt to rapidly evolving consumer expectations. Patients place high value on aspects such as a hospital's reputation and service elements as well, apart from treatment. The Report identifies and explains the opportunities and gaps in experience and services offered by the healthcare providers from patients' perspective in India, which plays a crucial role in ensuring healthcare consumers' loyalty. Some key findings show that 61% of the patients rated their overall experience in private hospitals positively as compared to 45% for government hospitals. While the private hospitals are considered non-transparent in billing, government hospitals are rated poorly for infrastructure. The Report delves on the experiences and expectations of the patient and provides recommendations to the government and healthcare providers, for patient centric care delivery.

<http://www.ficci.in/publication.asp?spid=20948>



Illicit Trade: Fueling Terror Financing and Organised Crime

The report underlines the growing linkages of terror financing and organized crime to illicit trading activities such as counterfeiting, smuggling and piracy. It is a compilation of facts and figures, global best practices, case studies and initiatives taken at the national and international level to understand and tackle the problem of terrorism and organized crime. The report also discusses different mechanisms adopted to fund such activities, charts a roadmap to prevent terror financing and recommends a detailed framework for the government which will help curtail the extent of illicit trade in India. According to the report, India was the third most affected country by terrorist activities in 2016, with the first and second positions occupied by Iraq and Afghanistan, respectively. Another feature highlighted is that counterfeiting stands as the second largest source of income for criminal activities such as terrorism globally, as estimated by United Nations Commission on Crime Prevention and Criminal Justice (UNCCPCJ). The report also highlights that the total employment losses globally due to counterfeits and piracy stood at 2 to 2.6 million jobs in 2013 and is expected to rise to 4.2 to 5.4 million jobs in 2022, suggesting an approximate increase of 110 per cent.

<http://www.ficci.in/publication.asp?spid=20962>



Medical Value Travel in India

India is well positioned to be the healthcare provider to the world. Highly qualified doctors, state of the art medical technologies and affordable high quality healthcare are key elements that are working in India's favor for bringing global medical travelers to India. Both, the government and the industry are taking initiatives to provide a seamless experience to medical travelers. The objective of this study is to reflect on the progress made on focus areas, which were identified for accelerated growth of MVT in India. The survey conducted this year has shown positive sentiment of foreign patients towards Indian healthcare, though few areas for improvement have emerged, India is well on the path to strengthening its position among world's leading destinations for MVT.

<http://www.ficci.in/publication.asp?spid=20004>



Vision for School Education 3.0 School

Through this vision document, we reimagine new paradigms that would create pathways for school education that focus on creating capabilities powered by inclusivity, inquiry and innovation. The discussion paper provides a framework of the aspired state of affairs in Education 3.0 supported by the vision of creating global productive citizens empowered with high-order thinking, reasoning and problem solving skills who are emotionally equipped and carry the ability to seamlessly adapt to disruptive change and become positive contributors to the world around them. Such education and schools will produce 21st century learners who are ready to take on, adapt to and succeed in this rapidly changing world.

<http://ficciarise.org/wp-content/uploads/2017/06/FICCI-ARISE-EY-Discussion-Paper-Vision-on-School-Education-3.0.pdf>



Model Self-Financed Independent Schools Code

The Model Code lays down the framework for independent schools to practice utmost levels of transparency and governance through self - regulation and accountability. Equity, Quality, Excellence and Partnerships are the core four pillars of this code. The Code prescribes a balanced framework that provides adequate autonomy to self-financed independent schools to excel and renders adequate powers to the state to regulate them. This framework once adopted shall clear the regulatory maze and attract long term visionary investors to enter the sector. Increased supply shall in turn increase competition that shall boost quality, transparency and affordability. The parents shall be the winners who would then have a vast variety of high quality schools of different genres to choose from for their wards.

<https://www.ficciarise.org/courses/model-self-financed-independent-schools-code/>



India Gas Infrastructure : Strategies to accelerate to a Gas Based Economy

The paper covers the theme in three major heads:

- Indian Gas Market Scenario - Developing a Market for Gas Economy;
- Gas Infrastructure – Need for an Integrated Strategy;
- Acceleration towards a Gas Economy: A Strategic Road Map

Some of the key issues identified are the need for development of multiple supply including domestic and LNG resources, Integrated Energy Planning covering Power, Coal, Gas and Renewable Energy, planned Infrastructure Development and effective utilization, focused development of anchor sectors like power, realistic assessment of demand, need for a robust regulatory structure and policy support and interventions to provide the initial momentum.

<http://www.ficci.in/publication.asp?spid=20995>



India-Russia: Identifying New Opportunities

The FICCI report has sought to highlight existing opportunities available for Indian Industry in the Russian Far East region. Russia is seldom thought of as an Asia-Pacific country. Yet it is one — thanks to its Far East. The Russian Far East (RFA) is a huge area of Northeastern Eurasia stretching from Lake Baikal to the Pacific Ocean. Allowing Russia direct access to the Asia-Pacific region, the RFE makes it a truly transcontinental nation, the only other such a country being the U.S. Constituting over one-third of Russia's territory, home to major natural resource deposits, and essential to maintaining increasingly valuable Asian trade routes, the Far East Federal District is a strategically important asset for Russia.

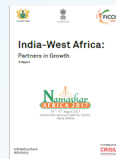
<http://www.ficci.in/publication.asp?spid=20977>



India-Japan a Snapshot of Economic and Investment Relations

As the current financial climate which is witnessing global investments move increasingly to emerging economies, the role of India and Japan in shaping the Asian success story is predominant. This report provides a broad overview of the economic relations between India and Japan, economic and commercial cooperation between the two countries, trade between the two countries and the initiatives taken by the governments of both the countries to enhance trade and investments opportunities between them.

<http://www.ficci.in/publication.asp?spid=20979>



India-West Africa: Partners in Growth

Western Africa, which is at the heart of Africa's transformation, has gradually moved towards greater regional integration, most notably through the establishment of two Regional Economic Communities (REC) – Economic Community of West African States (ECOWAS) and West African Economic and Monetary Union (UEMOA). This knowledge paper on “India - West Africa Partners in Growth” outlines opportunities where both Indian and West African economies including Ghana can work as partners in growth. This paper presents the economic outlook of West Africa, an overview of existing Investment promotion policies, Acts, Regulations and key taxation laws in West Africa. More importantly this paper highlights partnership and collaboration opportunities between the two regions in priority sectors such as agriculture & food processing, infrastructure & construction, healthcare & pharmaceuticals, energy to name a few in fostering a mutually beneficial relationship towards economic development of the two regions.

<http://www.ficci.in/publication.asp?spid=20996>



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

WE LISTEN

WE ANALYZE

WE INFLUENCE

WE CONNECT