

A large, semi-transparent magnifying glass is centered on the page, with its handle pointing towards the bottom right. Inside the lens of the magnifying glass is a stylized globe of the Earth, showing continents and oceans. The background of the entire page is a light blue color with a repeating pattern of the FICCI logo.

KNOWLEDGE PAPERS

Series 5/2020



Future India: Captivating Strategic and Private Equity Investments

India has emerged as a preferred destination for investors from across the globe. Key initiatives, policy changes and a slew of reforms have put India on the global map as one of the fastest growing economies. The favourable demographics of India created a robust domestic consumption market that has propelled growth. Furthermore, the pro-business environment provided by the government policies is helping attract investments into the country.

FICCI and Colliers have co-created this Report on 'Future India: Captivating Strategic and Private Equity Investments' that portrays the investment scenario in the real estate industry. In this report, we showcase vital factors contributing to India's growth story leading to increased investments in various sectors and how stakeholders, including government and investors, can seize opportunities in investable India.

<http://www.ficci.in/publication.asp?spid=23332>



Post-Covid-19: The Future of Office and Industrial and Logistics Real Estate in India

As the economy opens in a staggered manner, businesses (including those involved in real estate) are reporting widespread changes in their functions as they adapt to the post-COVID-19 "new normal".

Within the office sector, evolving work patterns would result in newer perspectives for occupiers and developers, going forward. Meanwhile, the industrial & logistics (I&L) sector has shown tremendous strength despite supply chain disruptions. In the short term, traditional demand drivers such as manufacturing output, consumer spending and trade have been adversely impacted due to COVID-19. However, e-commerce channels have boosted demand for warehousing space as the stay-at-home directive led to increase online shopping across the country. The report presents view on how these two sectors have evolved so far against the backdrop of COVID-19, and what could be the way forward for them.

<http://www.ficci.in/publication.asp?spid=23331>



Indian Housing Sector: Disrupted, Transformed & Recovering

The Indian real estate sector has been experiencing continuous transformation since the turn of the century. This transition has been for the better and the accomplishments so far have been remarkable. The results are quite visible today as the sector has become better organized, compliant, accountable, and transparent compared to what it was during the last decade of the 20th century. A slew of systematic structural reforms and policy changes led to the elimination of weaker players, large-scale consolidation, and entry of large corporate houses into the Indian real estate sector. FICCI and ANAROCK Report on "Indian Housing Sector: Disrupted, Transformed & Recovering" covers various facets of the Indian housing sector and addressed the need to restore the faith and confidence of the buyers as the future of real estate looks bright.

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<http://www.ficci.in/sector.asp?sectorid=59>



Indian Specialty Chemicals Industry Biggest Beneficiary of The Global Paradigm Shift

The report titled "Indian specialty chemicals industry; the Biggest beneficiary of the global paradigm shift" provides a comprehensive overview of the specialty chemicals industry and some highly attractive sub-segments along with few emerging business models in India. The report also evaluates India's ability to become self-reliant in the specialty chemicals industry by highlighting the factors that led to China's emergence in the global specialty chemicals industry, the subsequent disruptions and geo-political events which led to re-evaluation of the supply chain, and eventually, discuss the key factors that will determine India's ability to leverage this opportunity. The report also outlines the supply-side disruptions caused by the pandemic - both in the initial period and subsequently. Also, it evaluates the immediate demand-side impact of the pandemic, and the long-term outlook for the sub-segments' basis the degree of benefit that will derive from the supply chain realignment, globally. The Government of India will have to play a pro-active role and work in tandem with the private sector to ensure that India is able to leverage this strong growth opportunity. In this report, some of the key recommendations have also been specified that are crucial for ensuring the growth of the industry.

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<http://www.ficci.in/publication.asp?spid=23338>



Leapfrogging to a Digital Healthcare System: Reimagining Healthcare for Every Indian

COVID-19 pandemic has profoundly impacted all socio-economic aspects of our lives, while also inspiring promising innovations, particularly in digital healthcare models. From the telemedicine guidelines being announced in March 2020 to the launch of national digital health ID in August 2020, we have already started to see the digital era in Indian healthcare take shape.

With this view, FICCI, in partnership with Boston Consulting Group (BCG), undertook a study to layout the contours of the Open Digital Health Ecosystem as envisioned in the National Digital Health Mission (NDHM) announced by the honorable Prime Minister Sri Narendra Modi on 15th August 2020. The Report titled, "Leapfrogging to a Digital Healthcare System- Reimagining Care Delivery for Every Indian", was released by Shri M Venkaiah Naidu, Hon'ble Vice President of India at the 14th FICCI HEAL (FICCI's annual health conference), on 29th Sep 2020.

We are now at the cusp of the digital 3.0 era of Open Digital Ecosystems that represents a fundamental change in the way the government can leverage technology for public care delivery and enable private sector innovation. It entails creation of a shared public digital infrastructure that can be leveraged by both public and private players to deploy new solutions that enhance the end-user experience. The report undertakes a collaborative approach to ensure that multiple perspectives across government bodies, private sector entities, developers, and the user community are brought to the forefront.

<http://www.ficci.in/publication.asp?spid=23337>



Successful Business Interventions for Minimising Food Loss & Wastage

With the availability of limited resources across the globe, there is an immense pressure on the world to sustain the food demand of growing population. The Sustainable Development Goals (SDGs) also calls for reducing per capita global food waste at the retail and consumer levels and food losses along global production and supply chains by half by 2030. Hence, reducing food loss and waste requires utmost attention and actions of all - from warehousing and cold chain companies, food supply chain industries, retailers to Agtechs.

In this regard, on the observance of the First International Day of Awareness of Food Loss and Waste on 29th September, FICCI is releasing a comprehensive compendium on "Successful Business Interventions for Minimising Food Loss and Wastage. This compendium lists ten such case studies talking about the business models implemented by Agribusiness Industry and Agtechs which have helped in minimising Food Loss and Wastage. Each of the case study is inspirational and offer huge learning for the ecosystem players.

<http://www.ficci.in/publication.asp?spid=23336>



Ushering in a new growth wave: From artificial intelligence to agricultural intelligence

Keeping in view the critical transformative role of AI in Agriculture, FICCI in collaboration with PwC has developed a Knowledge report "Ushering in a new growth wave: From Artificial Intelligence to Agricultural Intelligence". The key objective of this book is to present and suggest a future road map for embracing potential AI based innovations in agriculture. The Report clearly identifies that digital technologies in agriculture have capabilities to enable the development of new efficient business models and ultimately make the food systems more productive, sustainable, efficient, transparent and resilient.

The report will help the key stakeholders such as policymakers, technology platform companies, agribusiness industry, Agtechs to exchange relevant ideas and collaborate on the market opportunities which can lead to ingrain sustainable profitability with significant yield enhancement in Indian agriculture through improved adoption of AI. The strategies proposed in the report are majorly aimed at promoting a sustainable and socially embedded AI ecosystem in agriculture, and transforming AI to agricultural intelligence. Report was released during FICCI's International Conference on "AI & Digital Applications in Agriculture" on 08-09 October 2020.

<http://www.ficci.in/publication.asp?spid=23343>



Hotels and Tour Operator's Survey on the Impact of Covid-19 on the Travel & Hospitality Industry

FICCI-Nielsen Report on 'Hotels and Tour Operators Survey on the Impact of Covid-19 on the Travel & Hospitality Industry' highlights the status of the hoteliers and tour operators from mid-June to July 2020, during the lockdown, along with the measures and mitigation plans to revive the industry.

FICCI-Nielsen Report also highlights the promotion of heritage, cultural, culinary, social, eco-tourism, rural, adventure, textile tourism, etc post lockdown and pandemic where the industry is connected to various other sectors such as FMCG, transport, agriculture, health etc.

The report states the comprehensive idea about the current situation in the Travel and Tourism sector in India. In the light of the global experience, it is worthwhile to note that there is a certain level of resilience in the sector.

The report comprises of a framework for assessing the policy interventions and financial support that the industry needs. By choosing Tour operators and Hoteliers, the survey kept in mind the backward and forward linkages they bridge and hence could arrive at a complete picture of the sector with respect to loans and RBI moratorium and training and on ground implementation of Standard Operating Procedure (SOP) that would be reassuring domestic as well as foreign tourists.

<http://www.ficci.in/publication.asp?spid=23346>



FICCI-FBF Rights Catalogue 2020 - Indian Writing

In endeavour to find global markets for Indian Publishers and authors, FICCI and The Frankfurt Book Fair have come together to publish a 'Rights Catalogue' of select writings from India, to be presented to participants of The Frankfurt Book fair. FICCI-Frankfurt Book Fair Rights Catalogue lists some of the Indian publications.

These include latest titles published by some of the leading publishers who are interested in exchange of rights for publications in other markets. For the convenience of the readers, the Titles thus received are segregated according to different genres.

<http://www.ficci.in/publication.asp?spid=23345>



FICCI Recommendations for Unlock 5.0

FICCI recommended to unlock select activities which remained prohibited in the MHA Unlock 4.0 order, and also suggested safety measures/SOPs which could be adopted while opening up prohibited activities. FICCI recommended lifting restrictions, with strict adherence to safety measures for the following sectors -

- 1) Exhibitions and Trade Fairs
- 2) Cinema Halls and Theatres
- 3) Amusement Parks
- 4) Tourism and Hospitality
- 5) Civil Aviation
- 6) Sports

<http://www.ficci.in/policy-recommendations.asp>



Strategies for Sustainable Plastics Packaging in India- A USD 100 billion Opportunity till 2030

The paper provides a toolkit to Indian industry to transition from plastic waste management mindset to a value-chain-based sustainable packaging mindset, focusing on both upstream design and production interventions as well as downstream recycling interventions

In the proposed Sustainable Plastic Packaging Strategy, we have identified three levers which lend themselves into eight interventions, with potential to reduce value loss from unsustainable choices by almost ~100 bn USD in the next ten years. The quantitative modelling conducted by Accenture team is first-of-its-kind done in the Indian context and I praise them for setting a data-backed narrative

To act on these eight interventions, industry needs to work pre-competitively with policymakers to create the enabling environment. To that end, paper has also articulated five big-ticket system-level accelerators which will go a long way in pacing-up the shift. The paper also deep-dives into the impact of COVID-19 on plastic packaging and waste management landscape, a very critical topic for all our members in these unprecedented times.

<http://www.ficci.in/publication.asp?spid=23348>



India-Japan: Time to Seize New Opportunities

India's economic performance over the past few decades has been added attraction, and according to the United Nations Conference on Trade and Development 2019 World Investment Report, India ranks amongst the top 10 host economies for foreign direct investment. India has historically accounted for 70 to 80% of foreign direct investment inflow into the South Asia region. India has pursued deeper structural reforms to incentivise foreign investors to invest in India, and to benefit from their investments in India.

This FICCI report, supported by various partners, provides insights on various aspects that make India a preferred investment destination, covering following key elements:

- Ease of doing business
- Contract Enforcement
- Starting a Business
- Trading
- Logistics and Infrastructure
- Trade and Economic Cooperation Agreements
- Cheap and Skilled Labour
- Labour Laws
- Proximity to other geographic markets and one of the largest markets globally
- Indo-Japan initiatives to bolster investment
- Case studies and success stories
- Measures required to improve business environment

<http://www.ficci.in/publication.asp?spid=23334>



AIBC Report to AEM Consultation 2020

FICCI as the Indian secretariat of ASEAN India Business Council (AIBC) presented Industry recommendations of 2020 at the 17th ASEAN-India Economic Ministers Consultations held virtually on 29th August 2020. ASEAN – India Business Council has been making continuous efforts towards strengthening co-operation in priority sectors, lobbying on non-tariff barriers and market access issues to facilitate seamless movement of goods across the two regions. Indian Industry welcomes the ASEAN's positive response to re-examine the India-ASEAN FTA and has proposed its suggestions for the review process. The report focussed on challenges and opportunities to enhance trade and investment relations.

<http://www.ficci.in/publication.asp?spid=23342>



India-East Asia Knowledge Paper

LEADS- a unique multi-faceted international platform to 'Reimagine the World', a world where change is the only constant and disruptions are becoming frequent.

It's the inaugural edition of "LEADS 2020 : Reimagine the World". This is a 4-day global thought leadership initiative from FICCI, spanning the globe and curated as an engagement platform for insights into five fundamental questions that underlie the quest for global economic prosperity, which is inclusive and sustainable for well-being citizens. This year, the program shall be organised on a virtual platform from October 12-15, 2020

Given that some of these major economies of this region have decided to de-risk their manufacturing investments and diversify their supply chains, India provides an opportunity to the Eastern countries to simplify them and make them cost-efficient for the world. In this session Global leaders shared their views on enabling policy framework and opportunities for manufacturing collaborations. The knowledge report provided an overview of LEADS 2020, India-East Asia relations and key discussion and outcome of the regional session on global value chains.

<http://www.ficci.in/publication.asp?spid=23363>



India-North America Knowledge Report

India has longstanding bilateral relations with the North Americas nations like US & Canada. These are built upon a "mutual commitment to democracy", "pluralism", and "people-to-people links". The ties go back late in the 18th/19th century. India's relations with these countries are moving in a positive trajectory led by search for new opportunities and avenues for future collaborations. This report highlights some of these upcoming areas of cooperation that Indian industry could consider for effective engagement with US & Canada going forward.

<http://www.ficci.in/publication.asp?spid=23355>



India- Latin America & Caribbean Knowledge Report

Despite being located oceans apart the growing bond between India and the nations of Latin America and the Caribbean (LAC) presents both sides with an immense opportunity in terms of trade and investment ties. There is significant untapped potential for Indian exporters in categories such as pharmaceuticals and agro chemicals, machinery and mechanical appliances, electrical machinery and equipment, plastics, transport vehicles, pharmaceuticals, among others, owing to their high import demand in the region. Moreover, based on FICCI's research, sectors such as communications, automotive, business and financial services, alternative/renewable energy, metals, food and tobacco, and hydrocarbons present opportunities for Indian investors for enhancing investments in the LAC region. This knowledge paper will take you to a journey of reimagining the distance between the two regions.

<http://www.ficci.in/publication.asp?spid=23365>



India Europe Knowledge Report titled, 'Reimagining Technological Innovation'

FICCI's India-Europe Knowledge Report titled, 'Reimagining Technological Innovation' prepared on the sidelines of the 'FICCI LEADS 2020: Reimagine the World Initiative' is a bird's eye view on the emergence of technological innovations in various sectors of the economy with special focus on India and Europe. The recent India EU Virtual Summit and its shared vision to revive the economy towards inclusive, equitable, sustainable growth is given a special mention. The report draws attention to the pioneering efforts of Europe in technological innovation with an ecosystem of strong entrepreneurial zeal and long history of industry excellence in small and medium sized enterprises (MSME's). Significant emphasis is given to India's unique opportunistic advantages and potential areas for joint cooperation. Lastly, the report provides a comprehensive view of the fast-evolving sectors including Smart Cities & Urban Mobility, Healthcare & Pharmaceuticals, Aerospace & Defence, Travel, tourism & hospitality.

<http://www.ficci.in/publication.asp?spid=23364>



India Europe Knowledge Report titled, 'Reimagining An Extended Neighbourhood'

FICCI's India-CIS Knowledge Report titled, 'Reimagining An Extended Neighbourhood' prepared on the sidelines of the 'FICCI LEADS 2020: Reimagine the World Initiative' endeavours to provide comprehensive insights to redefine and reignite the economic fabric between India and CIS economies. T

he report highlights the economic and socio geographic factors, key resources and sector specific potential of CIS economies. It provides a historical perspective on the relationship of India with the CIS economies dating back to the ancient silk route era. The report draws attention to the need to enhance connectivity between the regions and further provides suggestions to establish new architectures of connectivity.

<http://www.ficci.in/publication.asp?spid=23362>



Concept Note Multilateral Session

The need of the hour is for Multilateralism to be inclusive with smart global governance. The idea is to support multilateralism but at the same time address local issues and prioritise localisation while imbibing best practices and standards globally through a 'Global' approach.

<http://www.ficci.in/publication.asp?spid=23357>



India-ASEAN Knowledge Report- October 2020

The pervasive influence of technology creates a paradigm shift in the way we work, communicate and live, which brings the necessity to reimagine the way India engage with ASEAN in terms of building digital economies and digitally enabled future. The policy makers in ASEAN has been focusing on economic integration. The plan has given rise to ASEAN digital data governance framework that seeks to drive digital innovation and create a stronger digital agenda in the region. Technology will be adopted in the region in a bigger scale, efficiency in business and governance will be a notch higher, and products and services from the region will stand a stronger chance of competing in the global market. India's prowess in technology-led business excellence combined with the leadership, teamwork, creativity, and social skills, and the speed, scalability, and quantitative capabilities of ASEAN makes for great synergy. The report focuses on how India can take forward this partnership for benefit of the economies of both regions and to build digital future.

<http://www.ficci.in/publication.asp?spid=23360>



India- Oceania Knowledge Report- October 2020

In an era of accelerating change, there is immense focus on sustainability across sectors for the better future by economies. The Oceania countries are leading the world when it comes to achieving sustainable development in sectors such as Renewable Energy, Agriculture, Mining of Rare Earth Minerals and Ocean Resources. Likewise, India's focus on clean energy sector and sustainable practices across sectors, create value opportunities for India and Oceania to collaborate to provide better future. The report focuses on how India can consider Oceania as a strategic region with especially those which create value addition natural resources and how both regions can promote sustainable resource use, development and management based on existing experiences.

<http://www.ficci.in/publication.asp?spid=23361>



India-Gulf & West Asia Knowledge Report

India-West Asia relations remain centered on two key pillars, Energy security and a huge Indian diaspora. In this era of global disruptions India's shared vision with the region, of cooperative growth, prompts us to reimagine our future opportunities for economic growth. The session will focus on India-Arab engagement for reimagining business beyond oil. India-West Asia relations remain centred on two key pillars: energy security and a huge Indian diaspora. In this era of global disruptions and India's shared vision with the region of cooperative growth, prompts us to reimagine our future opportunities for economic growth. Various countries in the region have transformed themselves from trading hubs to media, entertainment and tourism centres. Other countries are rapidly adapting themselves to new realities and transforming into services or manufacturing hubs. The focus on sustainability and commitment to diversity and inclusion, are part of this transformation and new growth story. At the same time, major economies of the Middle East look at India as an opportunity for investments and trade.

<http://www.ficci.in/publication.asp?spid=23359>



India-Africa Knowledge Report

The African continent is best viewed as a collage of countries with cross-cultural nuances and diverse historical lineage. Together, this confluence of Arab, French, English, Portuguese, and Indian cultures is at the cusp of being a global growth hub. This will happen by reimagining its economic vision, human capital, diverse demographics, and geographical vagaries. The catalyst for transformation would be digital renaissance, infrastructure development, education and skill enhancement on an economic canvas.

Hence the future drivers for inclusive and sustainable economic growth in Africa would lie in enhancing its resilience to global disruptions, especially for its SME sector. Accordingly, the session shall focus on India-Africa business relations for reimagining Africa beyond conventional trade, agriculture and mineral resources. With its penchant for innovation and strong SME base across sectors, India can be a long-term partner for Africa. This is considering that Africa too is keen to engage with India and transform its own economy on the foundation of infrastructure, digitization and skills.

<http://www.ficci.in/publication.asp?spid=23358>



India-South Asia Knowledge Report

South Asia is one of the least integrated regions but in terms of economic opportunities, the region holds immense potential. India and partners in South Asia must reimagine regional co-operation by taking leadership positions to create fresh South Asian value chains and tap deeply into existing value networks.

A precondition for greater economic growth for the South Asia region would be enhanced regional connectivity, creation of regional supply chains, prioritisation of human-centric development and employment creation.

<http://www.ficci.in/publication.asp?spid=23356>



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

 www.ficci.in  [ficci_india](https://twitter.com/ficci_india)  [ficciindia](https://www.facebook.com/ficciindia)  [ficci_india](https://www.instagram.com/ficci_india)  [ficci](https://www.linkedin.com/company/ficci)  [ficciindia](https://www.youtube.com/channel/UCFicciIndia)

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

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