



KNOWLEDGE PAPERS

Series 4



FICCI-EY Indian Real Estate Report 2013 'Brave new world for Indian real estate: policies and trends that are altering Indian real estate'

This report sensitizes all stakeholders about changing scenario of Indian real estate and trends and progress at the policy front. It suggests that Indian real estate market requires investments of approximately US\$257 billion (including EWS housing) by 2015 out of which an investment of US\$29 billion is required in residential real estate alone. It highlights the trend in real estate funding in the pre-FDI period (before 2005), post FDI and before global meltdown period (2005-2008) and post global meltdown period (2008 onwards). It advocates advanced funding options such as real estate investments trusts (REITs) to provide industry players with a global competitive edge. The report analyses new policy environment viz. REITs, Companies Act 2013, FDI, Real Estate (Regulation & Development) Bill 2013, changes in service tax and value added tax legislations and its impact on Indian real estate. It also outlines emerging real estate asset classes like senior living housing, rental housing, branded apartments, entertainment real estate; transit oriented real estate, education and healthcare.

<http://www.ficci.com/publication-page.asp?spid=20346>



Telecom Sector 2013: Internet of People to Internet of Things - The Future of Communication

Theme of the report "Internet of People to Internet of Things" implies a fundamental shift in communication services. M2M enables seamless communication by making the ICT ecosystem 'intelligent' that leads to the identification of tangible and pragmatic optimization opportunities within a business domain. The Indian M2M market is at an early growth stage and the basic building blocks such as connectivity, adoption of IPv6 and standardization are being initiated. As the Indian telecom sector rides the wave of digitization growth via internet of things, next generation connectivity applications, domestic manufacturing of telecom equipment, and emergence of diversified business models will offer promising new opportunities for the various players (domestic and foreign), in addition to significant on-going opportunities across the traditional segments.

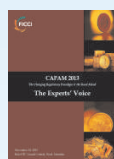
<http://www.ficci.com/publication-page.asp?spid=20341>



Private security services industry: Securing future growth

The role of a private security industry has never been more critical as in recent years. With the exponential growth of the Indian economy over the last two decades, the need for security arrangements of industrial complexes, offices, IT parks and public infrastructure has risen manifold. In order to meet this demand, the industry has significantly scaled its operational capabilities to supplement government machinery towards maintaining safety and security of citizens and their assets. This is indeed a sunrise sector, with potential to be the second largest employment generator and a major source of revenue for the exchequer by way of taxes. India is estimated to be amongst the top 10 security markets in the world by 2020, which leads to significant opportunities to be leveraged. FICCI – E & Y report is an attempt to address various issues and key drivers of the private security industry.

<http://www.ficci.com/publication-page.asp?spid=20329>



Capital Markets- The Changing Regulatory Paradigm & the Road Ahead

The Indian capital market is passing through a very interesting phase. The Indian government and the regulator have initiated several far-reaching reforms in the financial sector in the last six months including the new Companies Act, the report of the Financial Sector Legislative Reforms Commission (FSLRC), the re-promulgation of the Security Laws Amendment Ordinance and various other regulatory changes (enacted or proposed) that will have an impact on the capital markets. The papers in 'The Experts' Voice' aim to analyze some of these changes and reforms and the opportunities and challenges they would present for different stakeholders. The topics cover the entire expanse of the capital markets including equity and bond markets, asset management, corporate governance, recent regulatory changes such as the Companies Act, various SEBI regulations, Real Estate Investment Trusts (REITs), infrastructure financing and private placements.

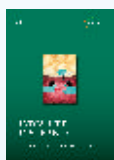
<http://ficci.com/publication-page.asp?spid=20340>



Public Sector Banks Profiling The Leadership Landscape

Financial sector in India being predominantly bank-centric, the banks play a major role in supporting the economy to achieve the desired sustainable growth. The pace of development for the Indian banking industry has been tremendous over the past decade and is expected to enjoy greater opportunities in the coming years. This report focuses on one of the key issues for Indian Banking sector - human resource management and leadership skill which can be looked as both an opportunity and challenge. Attracting, hiring, developing and retaining the best available talent and nurturing them to become the future leaders is a critical factor which will pave the way for the Indian banking industry to the world class level.

<http://www.ficci.com/publication-page.asp?spid=20336>



Report on India Life Insurance: Negotiating The Troublesome Teens

The Indian Life Insurance industry is at the crossroads today. The road to profitability would require players to reassess all aspects of their business models from pricing, products, risk management, customer acquisition and distribution. This report outlines an action agenda for the Life Insurance industry to come out stronger from the present phase.

<http://www.ficci.com/publication-page.asp?spid=20334>



Report on India General Insurance "Vision 2025"

Progress would undoubtedly require concerted efforts by the players to become globally competent in claims and operations. This report entails a fact-based view on the current state of the General Insurance industry, the key trends that will shape it in the next decade and its potential evolution.

<http://www.ficci.com/publication-page.asp?spid=20333>



Health Insurance Vision 20:20

The document tries to put forth the envisaged Vision for the Health Insurance Sector in India till the year 2020 and while doing that, it also endeavours to suggest several structural and regulatory changes that shall be required in the years to come for the sector to witness robust growth and development. Not only will the suggested changes put the growth of the sector at the centre, it shall also ensure increased market penetration, better customer services, more efficient distribution processes, wider product portfolio, a strong legal and regulatory and framework and above all it shall make patient centricity a concrete reality.

The paper highlights the Health Insurance vision 2020 “to have at least one billion Indians (80%) access quality healthcare enabled by affordable health insurance cover which could be social, government-sponsored, employment-based, community-based or private voluntary.” This is in line with FICCI’s overall health insurance vision to create an ideal universe of health insurance business with a satisfied consumer at the core.

<http://www.ficci.com/publication-page.asp?spid=20347>



Mapping Key Areas in Biopharmaceuticals: A Discussion Paper

The Discussion Paper by FICCI identifies the challenges which exist in the Biopharmaceutical segment, which holds the highest market share in the Biotechnology sector and also details the focus areas which need to be addressed by the stakeholders in this sector in order fast track the growth of Biopharmaceuticals in India. The significant issues discussed in the paper, include streamlining the regulatory framework in the sector, patient safety and quality of biologics, Industry-academia linkages and operations & innovation in technology, indigenous manufacturing, skill development and practice.

<http://www.ficci.com/publication-page.asp?spid=20338>



Higher Education in India: Vision 2030

FICCI –E Y Report “Higher Education in India: Vision 2030” is aspirational and futuristic, looking at India as a globally dominant economy, with a high quality higher education sector that leads and fulfills the needs of society. It has sought to get away from current constraints and challenges looking anew at what we could be by 2030, focusing on the genius and capability of our people and our civilisational ethos, and meeting our rightful destiny as a global leader.

It is strongly felt that a stratified three tiered structure that enables seamless vertical and horizontal mobility of students would be able to create the desired intellectual, economic and social value. The implementation framework suggests the student at the center stage to foster innovation and choice, an ICT architecture that will increase access, equity and quality, and a transparent governance framework that will enable autonomy and self framework.

<http://www.ficci.com/publication-page.asp?spid=20328>



Promoting Entrepreneurship in Food Processing Sector for Inclusive Market Oriented Development (IMOD)

FICCI-ICRISAT Report on “Promoting Entrepreneurship in Food Processing Sector for Inclusive Market Oriented Development (IMOD) - Strategies & Support Mechanisms”. This report identifies the challenges and also conveys the opportunities for the Food and Agribusiness community. The Report states that Food processing is one of the most important links in the agricultural value chain that enables value addition and reduction of post-harvest losses of agricultural produce. Enabling farmers to become part of this link by engaging them as entrepreneurs and through small-medium enterprises (SMEs) can help in the development of a vibrant agrarian and rural economy.

<http://www.ficci.com/publication-page.asp?spid=20343>



Enhancing competitiveness of Indian food chain

The Report indicated that the organised retail penetration in the food sector has remained low in the country and organised sales account for just about 1 percent of the total food and grocery spend. Added to this, nearly 30 per cent of food produce is wasted primarily due to the lack of adequate post-harvest infrastructure and poor supply chain management. It has been estimated that loss of primary produce before reaching the market due to lack of proper handling, cleaning, sorting, grading and packaging facilities at the village level is 30-40 per cent for grains, fruits and vegetables. Due to such inefficiencies in the supply chain, the farmer receives only a 25%-60% of what consumer paying. The report has given an eagle-eye view on the complete value chain of Food Processing sector.

<http://www.ficci.com/publication-page.asp?spid=20344>



Overview of The Indian Buffalo Meat Value Chain

FICCI’s Agriculture Division has undertaken a comprehensive survey in major meat producing states of the country interviewing major stakeholders of the buffalo meat value chain and developed an in-house report on Indian buffalo meat value chain. The report is divided into three sections. The first portion describes the value chain of buffalo meat production and processing for the domestic market: The subsequent section describes the same pattern in the buffalo meat value chain for export. The final section focuses on emerging trends in demand for buffalo meat in the domestic and export markets and India’s production capacity. The study not only identified the problems in different parts of the value chain but also elicited suggestions from stakeholders on what can be done further to strengthen the sector.

<http://www.ficci.com/publication-page.asp?spid=20331>



Knowledge and Strategy paper on "Speciality/Fine/Agro/Personal Care Chemicals/Dyes/Colorants & Pigments"

Specialty chemical industry is an important component of the Chemical industry. It is a knowledge driven industry known for their end use applications and/ or performance enhancing properties. In India it has been growing rapidly at 1.2-1.3x of GDP growth rate (~12%) over the last five years and currently stands at ~ \$23.50 Billion. The key specialty segments in India are agrochemicals, paints coating and construction chemicals, colorants, Active Pharmaceutical Ingredients (APIs), personal care chemicals and flavors & fragrances. India exports specialty chemicals to nearby Asia-Pacific countries which don't have competitive scale of productions. India also exports to developed countries of Europe and USA where it leverages its low cost of production and quality talent pool.

<http://www.ficci.com/publication-page.asp?spid=20325>



All that glitters is Gold: India Jewellery Review 2013

All that glitters is gold: Indian Jewellery Review, 2013"- FICCI- AT Kearney white paper is an endeavor to highlight the current status as well as the issues and challenges that exist in the Gems and Jewellery sector with appropriate solution themes. The report have also assessed the demand in India which can be segmented into consumption and investment and the total supply which consists of imports, mining, refining, trading, manufacturing, and retailing. The report endeavours to provide solutions to drive a comprehensive transformation of the industry to ensure sustainable growth and greater contribution to the Indian economy through higher exports and value addition. While several initiatives would benefit the industry, there are six broad themes identified in the report that can form the basis of action for the industry, Government, RBI, and other stakeholders

<http://www.ficci.com/publication-page.asp?spid=20332>



Vision 2014: Sector Skills Council, The Way Forward

SSCs are state sponsored employer-led organisations that cover specific economic sectors. Sports, Physical Education, Fitness and Leisure Skill Council (SPEFL-SC) will complement the existing education system for the Sports and Physical Education in meeting the entire value chain's requirements of appropriately trained manpower in quantity and quality across all levels on a sustained and evolving basis. However, prior to starting a full-fledged operation, SSC would be rolled out on a pilot basis to ascertain proof of concept and understand actual ground reality. A Detailed Project Report (DPR) will be prepared by SSC once it has established the proof of concept at the end of third year.

<http://www.ficci.com/publication-page.asp?spid=20323>



'Best 25 Ideas' - Sports Start-ups Businesses in India

This primary research based report on "Best 25 Ideas" Sports Start-ups Businesses in India in association with Dextrasports is a compendium of start-ups in sports sector and an analysis of fledgling sports industry in India. During the course of research, we unearthed a lot of inspirational stories behind successful sports ventures and interesting revelations about their journeys to success. The highlights are - Even though Professional Sports is something which India is not known for being good at, Youth Coaching is among top 3 business areas where new ventures are working on. A number of ventures focussing on variety of sports have grown rapidly and this is a testimony to the fact that there is high acceptance of professional coaching across a number of sports across the country. Another important highlight is the popularity of football as it is in the DNA of a lot of new ventures.

<http://www.ficci.com/publication-page.asp?spid=20322>



Modern Trams For Cities in India

The whitepaper called "Modern Trams" light rail transit for cities in India was prepared in consultation with Institute of Urban Transport (India) (IUT), which is focused on features of LRT and its worldwide usage; comparison of LRT with Metro rail, bus service and dedicated bus corridors. It also talked about integration of LRT with bus network and present mass rapid transit services in India. The whitepaper also emphasised on planning and design of LRT, aesthetics and technology; suitable LRT model for India; road junctions and signalling arrangements; system design, financing and its implementation via PPP or Government cum BOT model.

<http://www.ficci.com/publication-page.asp?spid=20301>



Doing Business with Afghanistan

Situated strategically at the heart of Asia, Afghanistan is a land bridge connecting South Asia with Central Asia, Eurasia and the Middle East. Emerging from twenty five years of conflict, Afghanistan, one of the poorest countries of the world, had performed better than the strong performers among the comparable countries in terms of broad macroeconomic indicators. Immense opportunities exist for potential investors in Afghanistan. This paper provides an overview of the sectoral opportunities available in Afghanistan, including a brief introduction of recent changes in the economy, regulation and how to get your business started there.

<http://www.ficci.com/publication-page.asp?spid=20345>



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