



Confederation of Indian Industry

INDIA AUSTRALIA

PARTNERSHIP

NEW FRONTIERS



MEETING OF INDIA - AUSTRALIA CEOS FORUM | 9 MARCH 2023, MUMBAI

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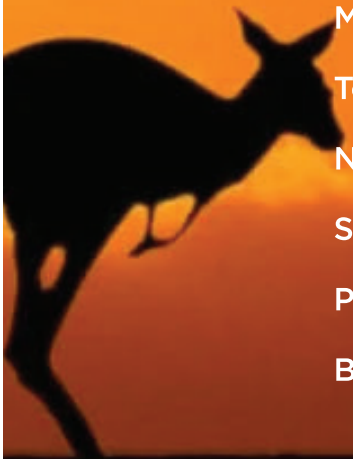
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OPPORTUNITIES IN AUSTRALIA

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INTRODUCTION



India and Australia have for years enjoyed a very warm relationship across multiple dimensions. Whether it is on the trade and economic front, people to people connect through movement of students, tourists and professionals or the cricketing and sports links, India's ties with Australia have always been very special.

In recent years, a new chapter has been added through common membership of Quad, Indo Pacific Economic Framework and Supply Chain Resilience Initiative, which make the bilateral relationship strategic and special in the larger Indo-Pacific region.

With the signing of the India-Australia Economic Cooperation and Trade Agreement (ECTA), Indian industry looks towards further strengthening trade and investment relations based on an already strong foundation.

INDIAN ECONOMY



Acknowledged as a bright spot in the global economy, the Indian economy stands strong. Keen to engage with the world, India is making meaningful contributions to the global dialogue and cooperation on a variety of important issues, including peace and security, sustainability, and inclusion.

India's vision for the world, is aptly reflected in its theme for its G20 Presidency this year - "Vasudhaiva Kutumbakam" or "One Earth · One Family · One Future", drawn from the ancient Sanskrit text of the Maha Upanishad.

**US\$ 3.5 trillion economy,
5th largest economy**

**9.1% GDP growth rate
in 2021-22**

**Highest ever exports at
US\$ 677 billion in 2021-22**

**522 million working
population with median age
of 29 years**

**US\$ 84 billion of FDI in
2021-22**

ECONOMIC PROSPECTS



CII undertook an economic growth estimation for India@100. Under business-as-usual scenario, India can become a US\$ 5 trillion by 2026-27, growing at 7.6% per annum in real terms and 12.2% per annum in nominal terms from current size of US\$ 3 trillion in 2021-22.

With further steady growth, India can reach US\$ 9 trillion by 2030-31 and US\$ 40 trillion economy by 2047-48.

This would require an annual growth of 5.6% and 9.2% in real and nominal terms respectively, from the medium-term target of US\$ 9 trillion.

By 2047

Expected to grow to
US\$ 32 trillion GDP
by 2047

Manufacturing to grow
to US\$ 6.2 trillion

Exports of goods and services
to grow to US\$ 8 trillion

REFORMS



The slew of reform packages implemented by the Government under the broad umbrella of 'Aatmanirbhar Bharat' (self-reliant India) worked on building the productive capacity of the domestic economy, which paved the way for building resilience of the economy.

Fiscal support during the pandemic period was targeted and prioritised to support the most vulnerable sections of society, leading India to escape the problem of decadal high inflation subsequently.

Privatisation of Government-owned enterprises

India Industrial Land Bank for land availability

Consolidation of labour laws into four labour codes

Ease of doing business – jump of 79 positions in World Bank EODB ranking

National Single Window System for central and state Government approvals

Corporate tax rate reduced to 15% for new units, 22% for existing units, among the lowest in world

Business reform action plan (BRAP) of 300+ reforms for state Governments

INFRASTRUCTURE



The National Infrastructure Pipeline (NIP) for FY 2019-25 is a first-of-its-kind mega plan to build world-class infrastructure and attract investments into infrastructure. The Pipeline comprises of 9,360 projects with an outlay of about US\$ 1.9 trillion. The projects span across 7 key sectors - Transport, Energy, Logistics, Water and Sanitation, Communication, Social Infrastructure and Commercial Infrastructure.

The private sector has a large role to play in this initiative, with 21% of investments envisaged to come from the private sector, in addition to the execution opportunities.

The National Bank for Financing Infrastructure and Development (NaBFID) has been set up with an equity capital of INR 200 billion (~US\$ 2.4 billion), and grants of INR 50 billion (~US\$ 610 million). The institution will provide long term patient capital to the infrastructure sector.

Many new programs have been instituted to boost infrastructure construction

Gati Shakti – GIS based technology platform for multimodal connectivity

National Logistics Policy – to reduce logistics costs

National Infrastructure Pipeline with about 9000 projects

National Monetisation Pipeline for about US\$ 73 billion over 4 years

National Bank for Financing Infrastructure and Development (NaBFID)

11 industrial corridors with 32 projects underway to develop industrial cities with plug and play infrastructure

High growth in public expenditure on infrastructure in 3 consecutive budgets

MANUFACTURING



This is an appropriate time for India to build its manufacturing sector and deepen its engagement with the global supply chains, as global majors look at diversifying both their supply chains and also production bases.

To push manufacturing, Production Linked Incentive (PLI) schemes have been announced in multiple sectors. A substantial sum of INR 1.97 trillion (~US\$ 24 billion) will be spent on incentives under this scheme, over 5 years. The scheme is open to foreign players.

**FDI reforms in mining,
defence manufacturing,
and other sectors**

**Revision in definition of Micro,
Small and Medium Enterprises
to encourage them**

**Semiconductor
mission of
US\$ 9.2 billion**

TECHNOLOGY



India has emerged as the fastest growing fintech innovation ecosystem. Global recognition has been given to India's revolution in digital payments. Innovative digital payment systems like UPI and Aadhaar-Enabled Payment Systems (AEPS) made this possible. AEPS-based micro-ATMs at CSCs (Common Service Centers) and post offices allowed doorstep delivery of cash transfers during Covid-19 while banks and ATMs were closed.

Open Government Data Platform: This platform was created to facilitate data exchange and encourage innovation with regard to non-personal data. More than 593,000 datasets are published in 12,940+ collections. The platform has enabled 9.48 million downloads.

1.3 billion unique digital identities (Aadhar)

**#2 in mobile phone users.
750 million smartphone users**

#1 in fintech adoption rate

74 billion digital transactions of US\$ 1.6 trillion in 2022

2.2 billion covid vaccinations through CoWin app

Among lowest data cost in world

3rd largest startup ecosystem with 107 unicorns

Global VC investment grew 285% in 2020-21

Jumped 41 positions in Global Innovation Index

Exponential rise in tech led startups - 143x rise in total funds raised in edtech startups from 2014-21; 684x rise in agri tech startups

Fortune 500 companies own 180 innovation centers in India

India Digital Stack

The India Digital Stack is a prime example of synergy between Government and Industry, wherein public investment has created a platform which both the public sector and private sector can use to build solutions on.

Inspired by the principles of open-source ware and interoperability, the platform is a powerful tool to drive social and financial inclusion.

The stack provides digital identity products centred around Aadhaar and today 95% of India's population has Aadhaar numbers. Many welfare programs of the Government use this identity for targeted delivery.

The CoWin app that enabled India to deliver the world's largest vaccination program is a great example of what India Digital Stack can deliver.

It has also enabled UPI (Unified Payments Interface) a real-time mobile payments system. In just a short period of 5 years, UPI has become the world's 5th largest payment network by volume with over 7 billion digital financial transactions in a single month.

The stack is set to revolutionise credit delivery in India, providing opportunities for millions of users to access the formal credit system.

The stack fosters innovation to build products for financial inclusion, healthcare, and educational services at scale.



NET ZERO BY 2070





India has made ambitious commitments at the COP26 including achieving net zero by 2070, and policy making is moving to achieve these goals. The Climate Change Performance Index (CCPI 2023), released at COP27, puts India at best among G20 countries and eight globally.

Low-carbon technologies are expected to create a market worth up to US\$ 80 billion in India by 2030.

India ranked 3rd in renewable energy country attractiveness index in 2021 and 3rd largest energy consuming country in the world. It has set an ambitious target to expand its renewable energy capacity from the current 166 GW to 500 GW by 2030. This is the world's largest expansion plan in renewable energy, creating large investment opportunities.

**4th largest producer
of RE and solar power**

**Best performance in climate
change performance index
2023 among G20 countries**

**LiFE being promoted for
adoption of
environment-conscious lifestyle**

SOCIAL SECTOR



The Government of India is committed to the ideals of “Sabka Saath, Sabka Vikas, Sabka Vishwas” (Together, for everyone’s growth, with everyone’s trust).

The Government has over the last few years created many welfare programs at globally unprecedented scale, providing basic amenities to the vulnerable sections of the society - such as housing, sanitation, clean drinking water, electricity, food supplies, health insurance, social security, financial inclusion, skill development, etc. Many of these programs use the Aadhaar identity.

The scale of these programs is huge.

**487 million bank
accounts opened**

**30 million low-cost
houses built**

**3.2 million free
healthcare treatment**

**20 million houses for women
under Housing for All**

**90 million free gas
connections for women**

PANDEMIC MANAGEMENT



India offered support to more than 150 affected countries with “Made in India” COVID vaccines, medical equipment and medicines during the pandemic under its ‘Vaccine Maitri’ initiative.

As per Government data, under this initiative, India has supplied more than 282 million vaccine doses of vaccines to 101 countries and two UN entities. Further, India also facilitated the evacuation of stranded foreign nationals from different parts of India to around 123 countries.

India’s vision of ‘Heal in India and Heal by India’ has further boosted India’s position as a global hub for medical tourism. Overseas expertise in biotech innovation, healthcare services, infrastructure provision and healthcare education complements India’s capabilities in drug and vaccine production, in contract manufacturing and medical training as well as the fast-growing ecosystem of technology start-ups.

**Fastest to administer
1 billion vaccines**

**25 million vaccines in a
single day**

**CoWin app as free
digital public good**

**200 million vaccines to
100 countries**

**0.5 million PPEs
manufactured per day**

BILATERAL TRADE AGREEMENT



The India-Australia ECTA is projected to consolidate and aid in the expansion of Indian product and service market share. New markets for Indian goods are also anticipated to emerge in Australia. With the relaxation of Australian regulatory processes, an increase in pharmaceutical items is projected. With the increased presence of higher value advanced technology items, a vertical migration in value chains is projected.



Mr Piyush Goyal, Hon'ble Minister of Commerce and Industry, Textiles, Consumer Affairs, Food and Public Distribution, India and Senator the Hon Don Farrell, Minister for Trade and Tourism, Australia

Trade overview

Australia is India's 17th largest trading partner

India is Australia's 9th largest trading partner

Total trade at US\$ 25 billion in 2021-22

India's exports to Australia at US\$ 8.3 billion

India's imports from Australia at US\$ 16.8 billion

Services exports from Australia to India at US\$ 5.2 billion

Services exports from India to Australia at US\$ 1.9 billion

370,000 Australian tourists to India in 2019

100,000 Indian students in Australia

India Australia Economic Cooperation and Trade Agreement

Came into effect on
December 29, 2022

Trade expected to increase to
US\$ 45-50 billion in 5 years

1 million
additional jobs

Gains for Australia

85% tariff lines
liberalized

90% of Australian
goods exported to India
in terms of value at
zero tariffs in 6 years

High tariffs reduced
on some additional
products

Savings of AUD 2
billion annually for
Australian exporters

In the next four years,
the percentage of Indian
imports exempt from
tariffs will reach 100%.

AUD 500 million
savings for consumers
and businesses on
imports from India

Gains for Australia in exports of
critical minerals, pharmaceuticals,
cosmetics, lentils, seafood, sheep
meat, horticulture, and wine

Gains for India

96% of exports to Australia to be tariff free

100% tariff free exports in 4 years

Access to lower cost of raw materials

Separate annexure for pharmaceutical products for addressing non-tariff barriers

Trade facilitating and promoting measures

The agreement seeks to create various dedicated bodies to promote specific areas of engagement and institutional mechanisms for cooperation

Some of these include:

Establishing a joint committee that will assess, review and monitor the implementation of the ETCA

Setting up a subcommittee on Trade in Goods to promote trade in both agricultural and non-agricultural goods and to address non-tariff barriers

Setting up a joint technical subcommittee on Rules of Origin and Customs Procedures and Trade Facilitation to oversee any issues arising with respect to Rules of Origin or Customs Procedures and Trade Facilitation

Double Taxation Avoidance Agreement (DTAA)

Signed in 1992

Under the ECTA, Australia has agreed to amend its domestic taxation law to stop taxing offshore incomes of Indian firms providing technical services to Australia.

This move is expected to eventually lead up to US\$1 billion in savings for Indian information technology (IT) companies operating in Australia.

Services

Full or partial access to more than 85 Indian service sectors and subsectors

Guaranteed highest standard of treatment in India to Australian exporters in 31 sectors and subsectors

Gains for Australia in higher education, adult education, and business services like tax, architecture, and urban planning

Gains for India in 135 services sub-sectors liberalized with MFN status in 129 sub-sectors in Australia

India's service exports to Australia have been significant in two areas

In both these sectors, Indian services have proved to be cost effective and high in quality. These advantages have led to a lot of outsourcing to Indian service providers especially in software development and BPO in IT related business and accounting and tax compliance in financial services. However, there are untapped outsourcing opportunities for Indian services like healthcare, entertainment, and travel and tourism sectors because of India's cost advantage and the availability of skilled professionals.

Information Technology
services

Financial Services

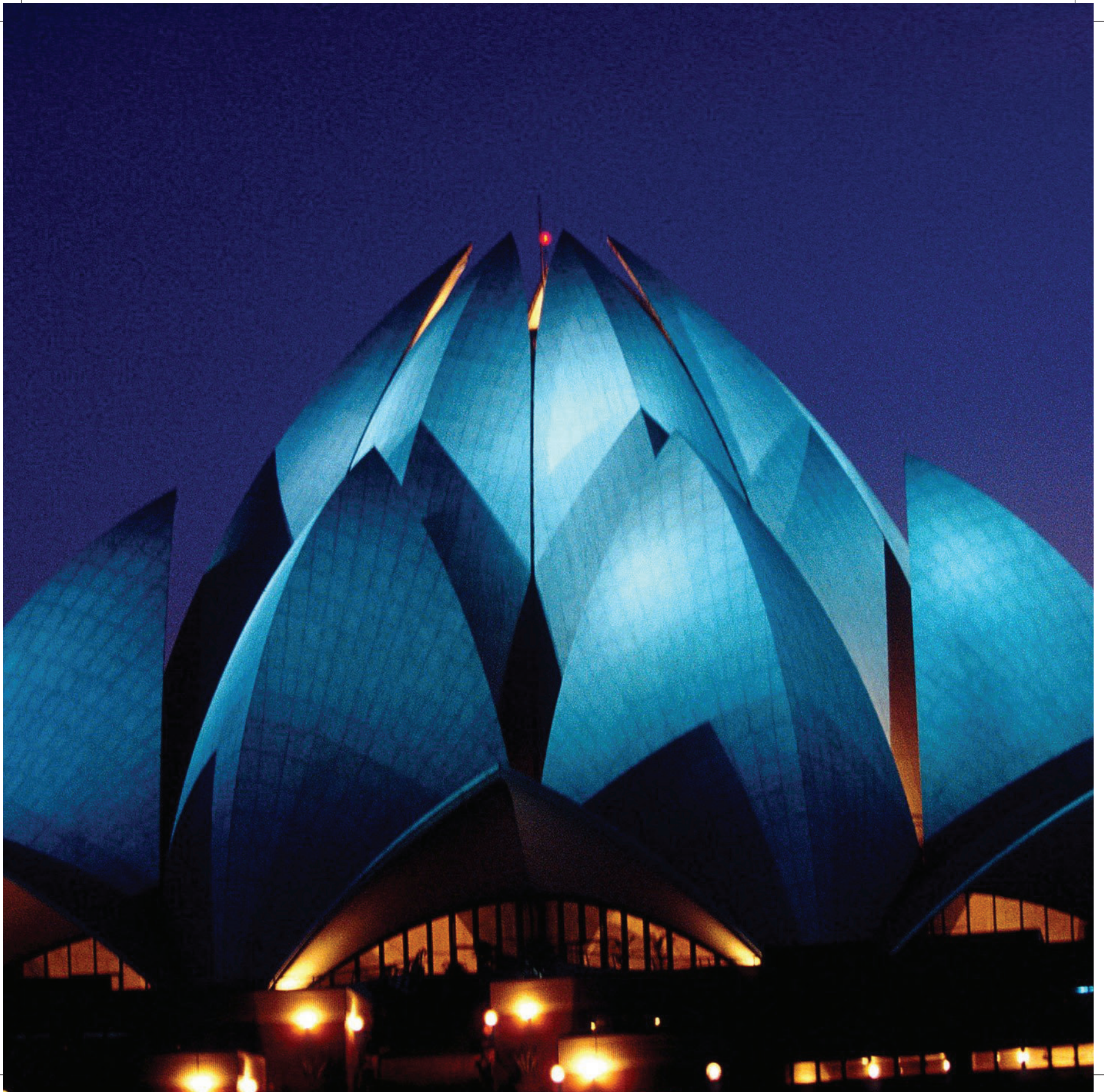
ECTA will provide huge mobility options between India and Australia that will foster people-to-people links, support trade and business and contribute to cultural exchange.

India and Australia have committed to work with their respective professional services bodies to negotiate mutual recognition or comparable agreements for qualifications, licencing, and registration procedures in professional services as well as services in regulated or licenced vocations. This provides a valuable platform for professional groups including MSMEs, traditional chefs and yoga instructors to communicate and negotiate mutual recognition or similar agreements, as well as to encourage them to contact their colleagues.

There is a provision for mutual recognition of professional qualifications and other licensed/regulated occupations. This will open up dialogues on Mutual Recognition Agreement (MRA) in nursing, architecture and other professional services between the professional bodies of India and Australia which in turn will facilitate the movement of professionals in each other's territory.

ECTA has the potential to boost the Australian tourism sector. It will also benefit the hotel and other lodging services, and for travel agencies and tour operator services wanting to operate in India, as it will have no restrictions on market access and commercial presence.

India has a huge potential for growth in the labour-intensive manufacturing sector and pharmaceutical sector, making Indian products versatile and more competitive in the international market.



OPPORTUNITIES IN INDIA

MINING



2nd largest crude
steel producer

95 minerals
produced

10 metallic
minerals

23 non metallic
minerals

55 minor
minerals

Largest reserves of iron ore,
bauxite, chromium, manganese ore

Cooperation areas

Mining
technology

Safety and
sustainability

Equipment and
supplies

Education and skill
development

Australia can participate in raising productivity of mines, driving higher efficiency and bettering mine safety. Australian mining equipment and technology (MET) services companies can introduce in India the advanced mining technology and best mining practices prevalent in Australia. India can also collaborate with companies for training in MET skills and occupational safety.

AGRICULTURE





Largest
producer of
cereal products

Largest
exporter of
cereals

3.5 million MT of
certified organic
products

US\$ 470 billion food
processing market by
2025

Cooperation areas

Agri
technology

Soil
management

Precision
agriculture

Smart
irrigation

Cold-chain
infrastructure

R&D

India is the world's largest producer of fruits and vegetables. Australia too is very strong in agriculture and one of the largest exporters of agri-products. This is an area where the two countries can cooperate to develop the food processing industry and related linkages to the international level.

Cooperation in areas such as cotton, walnuts and almonds as well as collaborations in food supply chain, processing and refrigeration, and techniques to prevent food wastage are new opportunities.

MANUFACTURING



Diversified manufacturing
across sectors

Industrial parks and
infrastructure

Availability of raw
materials and inputs

Competitive cost
structures

Large domestic market

Policy facilitation

Cooperation areas

Manufacturing for
exports

Industry 4.0

R&D

Green products

New product
development

Australian expertise in high-end value-added manufacturing and R&D can be deployed in India across multiple sectors. India is one of the largest producers of mobile phones, the third largest automotive market, and is making significant progress in the semiconductor and chip design industry. It is the largest manufacturer of generic drugs and has a large pool of skilled scientists, researchers and technicians.

RENEWABLE ENERGY





4th largest in RE
installed capacity

Target of 500 GW
by 2030

1000+ GW
potential

5 million tonnes of green
hydrogen aim by 2030

World's largest
RE park

Cooperation areas

Solar
PVs

Equipment
manufacturing

Biomass
energy

Energy
storage

Smart
grids

Skill
development

Energy management
systems

India and Australia have agreed to prioritise the transition to clean energy and the advancement of technology. The areas of cooperation include grid management, energy efficiency technologies, research and development collaboration on flue gas desulfurization, biomass or hydrogen co-firing, water cycle optimization, renewable energy integration, batteries, and electric mobility.

The two countries are also working on lowering the price of green hydrogen, improving the security and deployment of coal-based energy resources, and investment opportunities in the minerals sector, among other areas.

IT AND BPM





51% share of world
outsourcing exports

5 million skilled
workers

45% of India's
services exports

3rd largest hub for
technology startups

US\$ 227 billion
total revenues

Top in
digital skills

Opportunity areas

Software
development

Computer system
design

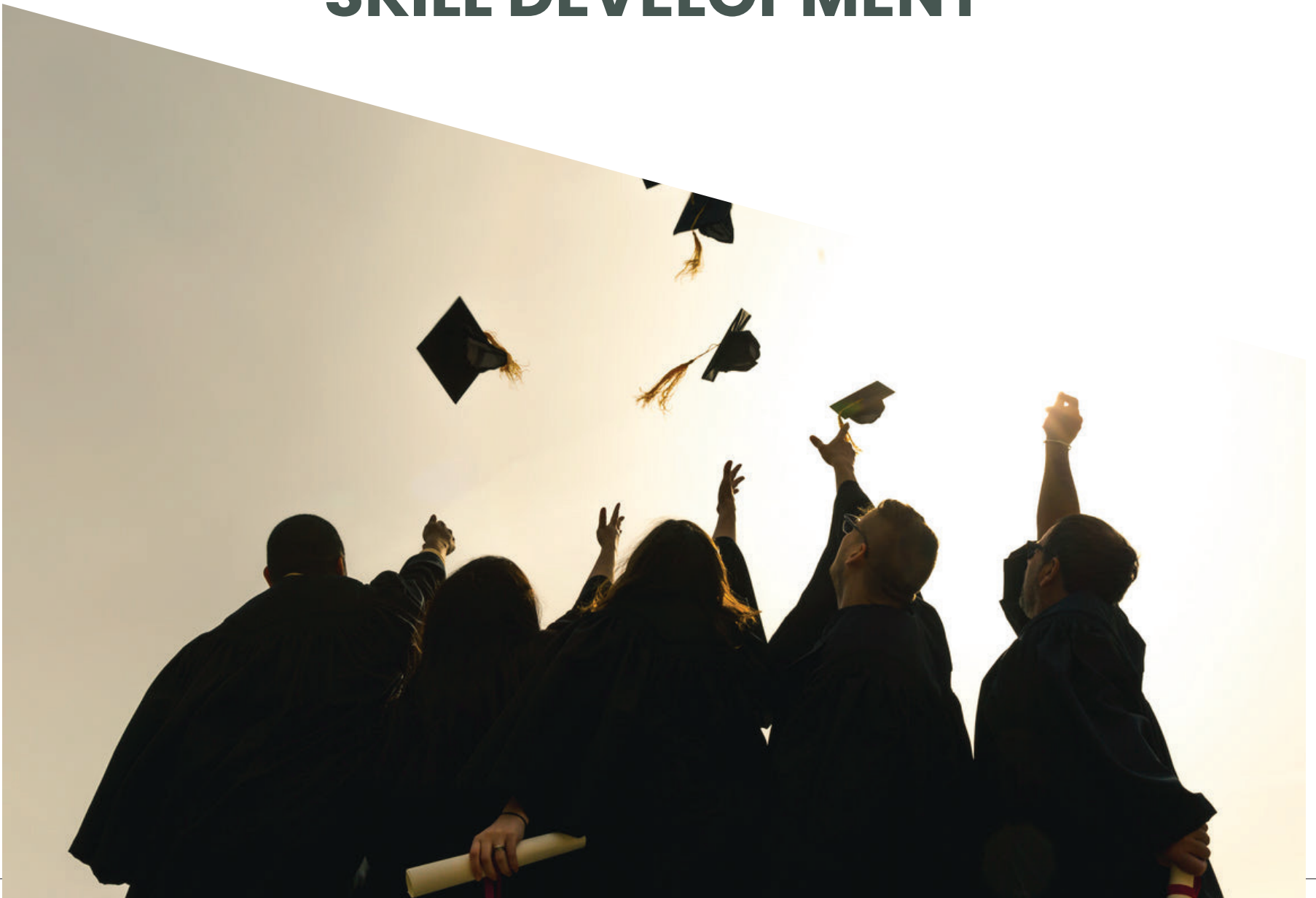
Telecommunications
services

Startups

R&D and design centres

The development of essential and emerging technologies including artificial intelligence (AI), next-generation telecoms (5G/6G), the internet of things (IoT), quantum computing, synthetic biology, blockchain, and big data will be significantly aided by India and Australia. India is home to 1500 global capability centres with a strength of 1.3 million workers and can support Australian companies in product development, innovation, e-commerce, fintech and entertainment, among others.

EDUCATION AND SKILL DEVELOPMENT



52% of
population
under 30 years

New Education
Policy

Target of 50%
skilling by 2035

International
cooperation
prioritized

Cooperation areas

Campus
development

Joint, dual and twinning
certifications

Research
collaborations

Skill development across sectors

Internships

India and Australia signed a Framework Mechanism for Mutual Recognition of Qualifications that will help ease the mobility of students and professionals between the two countries. A comprehensive mechanism covers both education and skill qualifications of the two countries and will help facilitate two way mobility of young people for education and employment purposes by mutually recognizing various levels of education and skill qualifications.

The signing of G-to-G mechanism for mutual recognition of qualifications, and the announcement of a Critical Skills Project and 11 institutional MoUs mark a landmark moment in educational relations between India and Australia. These will create more opportunities for students and professionals and prioritise education as the biggest enabler for stronger cooperation of the two countries.



OPPORTUNITIES IN AUSTRALIA

MINING



**Employs over 2.1%
of Australia's
workforce**

**Biggest
contributor to
Australia's GDP**

**Accounts
for 12% of
GDP (2019)**

**Australia has the world's
largest estimated
reserves of iron ore**

**The two major
commodities
mined in Australia
by volume are coal
and iron ore**

**Australia currently produces
9 out of the 10 elements
required to produce lithium
ion battery's anodes
and cathodes**

**Australia ranks within the
top 5 with global reserves
of iron ore, lithium, nickel,
copper, cobalt, manganese,
ilmenite and bauxite.**

With its large mineral reserves, Australia offers several opportunities for an emerging economy like India to secure access to resources such as coal, iron ore, copper, etc., which India will increasingly require as it aspires to develop its manufacturing capabilities through programs such as 'Make in India' and attract FDI in the manufacturing sector.

While several exploration projects are already ongoing in Queensland and New South Wales, Western Australia and the Northern Territory have been inviting foreign investments for exploration of deposits of commodities such as gold, magnesium, lithium, cobalt, tungsten, vanadium and rare earths and the country also has commercial reserves of graphite.

AGRIBUSINESS



Around 55% of Australian land is used for agriculture

Agriculture accounts for 12% of goods and services exports

The agribusiness sector employs around 1.6 million people

Australian Government is investing AUD 85.9 million to help agribusinesses expand

Cooperation areas

Milk productivity and milk shed technologies

Collaborations in weather and crop pattern research

Agri university in India

Agri-tech M&A

Purchase of land in Australia

Aquaculture

Deep sea fishing

Packaging

Food processing

EDUCATION





Australia has six of the world's top 100 universities

The number of international students studying Australian courses was 619,371 (2022)

Government expenditure on education was 7.0% (2019-20)

Around 1.8% of estimated GDP (2019-20)

Australia's Higher Education System is ranked 8th in the world (Universitas 2019 U21 Ranking of National Higher Education Systems)

Cooperation areas

Research collaborations

Curriculum development

Monitoring of student outcomes

Vocational education

Train the trainer programs

Australia has a well-developed higher education and vocational training sector with several internationally renowned universities. The education system has an internationally well-regarded curriculum that aims to create a job ready workforce. Australian education is also highly research oriented and promotes innovation. Education is one of the country's largest service exports attracting international students from all over the world.

The Australian education system is well-placed to meet the requirements of India considering its need for a robust education system in order to reap the demographic dividend from its young population.

HEALTHCARE



Health spending at about 10% of GDP (2021)

15 per cent of Australia's workforce are in Healthcare and Social Assistance industry (2021)

Australia has a regionally administered universal public health insurance program

Australia's healthcare system is ranked 32nd most efficient in the world by the WHO

Health accounted for 16.7% of Australian Government's total expenditure (2021-22)

Cooperation areas

Digital technologies

Healthcare skilling

Geriatric care

Hospital governance

Cancer care and research

Medical tourism

Data analytics

Australia has a shortage of qualified data analytics experts. India can use its IT expertise in the healthcare sector and assist Australian healthcare providers with medical coding, billing and insurance.

India can also collaborate with Australian med-tech companies to develop niche devices using manufacturing capabilities in India to manufacture and supply high volume medical devices such as blood pressure machines, portable ECG machines, wearable fitness devices, diabetes monitors, etc.

In the pharmaceutical sector, India has large players in the biosimilars and generics space that have research and development collaborations with large international pharmaceutical companies. Indian pharma and biotech companies can set up base in Australia to have a bigger share of the domestic demand. There is a significant opportunity for collaboration in Australia as the market as well as Government support for biosimilars has been growing in the country.

INFORMATION TECHNOLOGY



Tech sector is equivalent to 8.5% of GDP (2021)

One in 16 working Australians work in tech sector

Robotics alone injects an estimated AUD 18 billion into the Australian economy each year

Spending on technology products and services projected to exceed AUD 109 billion (2022)

Australia ranks 8th globally in Startup Ecosystem

Cooperation areas

Training in niche areas

Skill development

Software products

Startup development

The Information technology (IT) industry is one of the fastest growing industries in Australia and thus provides tremendous opportunities for collaboration between India and Australia. The IT industry in Australia is highly dynamic and is constantly evolving to serve the needs of various businesses, both within and outside Australia, driven by the large services sector.

Australia is welcoming and is open to engaging with new players in the IT sector.

OTHER OPPORTUNITIES



**Renewable
energy**

**Tourism, particularly sustainable
tourism & film tourism**

**Financial
services**

**Creative
industries**

Infrastructure

**Defence
manufacturing**

India and Australia both have high demand for cloud services and big data analytics. Australia can boost expertise in application development, block chain, IoT, AI and Machine learning with the help of India.

There is a large potential to address the global markets if India and Australia jointly work together to create a co-incubation model: Tech Incubations in India and business incubation in Australia.

Both the countries can leverage their strengths to support and grow the startup space in each country. The Australian startup environment has high demand for international talent. As India has the advantage of offering skilled labor, this can be utilized by Australia.

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PARTNERSHIP

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Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, with around 9000 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 286 national and regional sectoral industry bodies.

For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

As India completes 75 years of Independence in 2022, it must position itself for global leadership with a long-term vision for India@100 in 2047. The role played by Indian industry will be central to the country's progress and success as a nation. CII, with the Theme for 2022-23 as Beyond India@75: Competitiveness, Growth, Sustainability, Internationalisation has prioritized 7 action points under these 4 sub-themes that will catalyze the journey of the country towards the vision of India@100.

With 62 offices, including 10 Centres of Excellence, in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 350 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.

Confederation of Indian Industry

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