

**UK INDIA BUSINESS
COUNCIL:
ADVOCATING
BUSINESS SUCCESS
IN 2019**



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INTRODUCTION

The UK India Business Council (UKIBC) is the premier membership-led group supporting trade, business and investment between the UK and India for a reason.

In a year that took us from the Indian Commerce Minister's two-day visit to London for JETCO in January to the India-UK FutureTech Festival in Delhi this December via Prime Minister Modi's UK visit in April, we have connected UK businesses to decision makers, taken down barriers to operating in both countries, and maximised opportunities for our members.

We ask what our members need and advocate for this at all levels of Government to deliver investment, innovation, and economic growth. Through generating thought leadership reports and exploratory networking events, we ensure businesses are connected to decision makers and fully understand the Indian market and the regulatory environment.



Launch of 'The UK and India: Bilateral Investment Relationship' report with Managing Editor of CNBC TV18 News, Shereen Bhan, British High Commissioner, Sir Dominic Asquith, Secretary to GOI at the Department for Industrial Policy and Promotion, Ramesh Abhishek, and UKIBC group CEO, Richard Heald, OBE.

Indeed, UKIBC's strategic work ensures our members, leading UK and Indian business and universities, are better able to respond to oncoming developments, and work in partnership with decision-makers to deliver a better outcome for citizens and consumers alike in both countries.

As we look forward to a year where Brexit and an Indian General Election give opportunity to redefine the UK-India partnership, the UKIBC is poised to ensure that businesses can succeed.

This report proudly showcases the breadth of advocacy we deliver for our members and the corporate sector entering and expanding in India. At this historic time for UK-India collaboration, our work could not be more valuable.

Interested in UKIBC working for you? Explore how becoming a member can benefit you at www.ukibc.com

OVERVIEW OF UKIBC WORK AND ACHIEVEMENTS IN 2018

For advocacy to be successful, it has to be layered, nuanced, and engage a wide network of stakeholders. Since January 2018 UKIBC has:

HOSTED

50+ EVENTS ACROSS THE UK AND INDIA, INCLUDING...



14

SEMINARS



17

ROUNDTABLES



600+

ATTENDEES

OUR WORK TOOK US TO



Prime Ministers Theresa May and Narendra Modi with participants during the 2018 CEO Forum

WE PUBLISHED



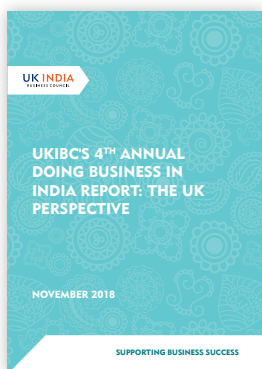
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THOUGHT LEADERSHIP REPORTS



72

UKIBC BLOGS AND ARTICLES



OUR WORK HAS BEEN FEATURED IN



to name a few...



WITH OVER
500,000

PEOPLE SEEING OUR POSTS ON SOCIAL MEDIA



AND OVER
250,000

PEOPLE VISITING OUR WEBSITE



ACTION THROUGH THE JANUARY JETCO

The UKIBC is the UK Government's Secretariat for the India-UK [Joint Economic Trade Committee \(JETCO\)](#) – an annual bilateral meeting between the UK's Secretary of State for International Trade, Rt. Hon Dr Liam Fox MP, and his counterpart, Shri Suresh Prabhu, the Indian Union Minister for Commerce and Industry.

In January 2018, over 150 UK and Indian businesses attended [the Plenary Sessions](#) with both Rt Hon Dr Liam Fox MP and Shri Suresh Prabhu, giving business leaders not only a chance to engage with the senior Ministers, but also with each other, making this a unique, high-level opportunity to further business-to-business collaboration.

During two closed-door working groups, one for smart cities and the other for advanced manufacturing, UK and Indian businesses were able to discuss market access issues and feedback directly to Secretary of State Fox and Minister Prabhu.

In support for the Smart Cities and Infrastructure working group, we produced a [joint paper](#) alongside FICCI outlining the opportunities and barriers to UK and India smart city operations.

A headline outcome from the Advanced Manufacturing and Technological Collaboration working group was the agreement to establish a joint Centre of Technological Excellence in India. This was further advanced at the India-UK Future Tech Festival in Delhi in December when the UKIBC and CII organised a roundtable for top business leaders, government officials and a [UK-India Manufacturing Catapult](#) Centre to drive the initiative forward.



UK Secretary of State for International Trade, Rt. Hon Dr Liam Fox MP, and the Indian Union Minister for Commerce and Industry, Shri Suresh Prabhu meet for the first time at the January JETCO.

JETCO is not simply about one-off business-to-business or business-to-government interactions, but building a long-lasting relationship based on mutual respect which we actively sought to reinforce through a dinner hosted by our Group CEO, Richard Heald, for our chief guest, Minister Prabhu. This was attended by 20 UK companies as well as the High Commissioner of India to the UK.

On the final day of Mr Prabhu's UK visit, the UKIBC was pleased to participate in a panel discussion, which included Mr Prabhu and Richard Heald to discuss the [future of the Commonwealth](#), which set a positive tone and direction for Mr Modi's subsequent visit to London in April for the Commonwealth Heads of Government Meeting

At the same time, JETCO saw Mr Prabhu meet Dr Fox for the very first time during his two-day visit to the UK. This proved a [key opportunity for businesses to connect directly with the Ministers that matter most to international trade](#) between the UK and India, and something we are proud to deliver for our members.

THE APRIL 2018 CEO FORUM AND MODI'S VISIT TO THE UK

UKIBC is also Secretariat to the UK side of the UK-India [CEO Forum which in April 2018 brought 40 top Chairs and CEOs from the UK and India together with Prime Minister May and Prime Minister Modi](#).

[The UK businesses attended the CEO Forum invested, in aggregate, almost £3 billion in India](#) in the last year, making this a unique window to actively promote the UK's significant contribution to the Indian economy during Prime Minister Modi's 2018 visit to the UK.

[This session](#) set the tone for Modi's visit with the subsequent [Joint Statement by the two Prime Ministers](#) announcing the UK-India Technology Partnership, an initiative long-advocated by the Forum, which discussed the UK and India's striking complementarities across the usage and protection of data to drive partnerships across healthcare, digital innovation, advanced manufacturing, infrastructure and higher education. The UK and India have extraordinary start-up ecosystems as two of the world's most innovative economies.

Our members are eager for leaders to keep up momentum on ease of doing business, maximising the potential from India's immense data wealth through high-quality data protection, and reforming labour mobility policies to further welcome transfer of skills and education.

This unbeatable potential for collaboration has become core to UKIBC's strategic work connecting business and government as we look ahead to 2019.



Prime Ministers Theresa May and Narendra Modi with participants during the 2018 CEO Forum

UKIBC'S WORK ACROSS SECTORS

UKIBC's work on JETCO, the CEO Forum, in ease of doing business, and interactions at both the national and state levels of government, cut across multiple sectors. We also carry out dedicated sector-based work through our specialists who understand key areas of the UK-India market and advocate on behalf of our member's exclusive Sector Policy Groups day-in and day-out.



**ADVANCED
MANUFACTURING
AND ENGINEERING**



DIGITAL INNOVATION



HIGHER EDUCATION



**LIFE SCIENCE
AND HEALTHCARE**



SPORTS AND GAMING



ADVANCED MANUFACTURING AND ENGINEERING

In the context of rapid industrial development and the onset of revolutionary digital manufacturing techniques, the opportunities for advanced manufacturing and engineering businesses in India are immense.

We ensure our manufacturing members' needs are on the agenda of key decision makers in both the UK and India. In 2018 we organised the JETCO Working Group on Advanced Manufacturing and Technological Collaboration. This brought together top businesses from both countries who relayed their views on market access issues and on how to catalyse greater collaboration, including the goal of establishing a UK-India manufacturing Catapult Centre in India, to the UK's Secretary of State for International Trade and the Indian Commerce Minister.

Manufacturing is been front and centre of our long-standing Ease of Doing Business campaign culminating in the release of our '[Fourth Annual Doing Business in India: The UK Perspective](#)', Report in November. Presenting this report directly to Number 10 in the UK and the Department for Industrial Policy and Promotion (DIPP) in India, we [secured agreement from the DIPP and Invest India](#) to a joint and sustained dialogue on the ease of doing business issues faced by our manufacturing sector members.

We have broadened these initiatives to the State level. Following discussions at the Magnetic Maharashtra Investor Summit with the State's Chief Minister in February 2018, and in September that year we took [a delegation of UK manufacturing businesses to the state to meet Mr Sanjay Sethi](#), former CEO of the Maharashtra Industrial Development Corporation (MIDC) with whom we have now signed an MOU to deepen co-operation between UKIBC and MIDC in January 2019.

Focussing on key topics including the GST subsidy and the discharging of offset conditions in defence, these interactions set an exciting scene for UK manufacturing at both the national and state levels in India in 2019.

TAKING ADVANCED MANUFACTURING ADVOCACY IN TO 2019

- In consultation with our Sector Policy Group members, in 2019 we will publish a UKIBC paper highlighting the opportunities and barriers faced by businesses in the Advanced Manufacturing and Engineering sector. This paper will contain recommendations on how to maximise opportunities and remove barriers.
- Alongside taking our national engagement on Ease of Doing Business to the next level with the DIPP, we will work with the UK and Indian Governments to deliver the CEO Forum and JETCO aim of establishing a [Manufacturing Catapult](#) in India.
- At the State level, where progress varies greatly in practice, we will redouble efforts to address manufacturing barriers with meetings in the pipeline with Maharashtra, Gujarat, Telangana, West Bengal and Karnataka State Governments for the first half of 2019.
- With greater foreign collaboration opportunities emerging in the Indian defence industry, we will be bringing UK businesses and Indian Government together early in 2019 to ensure UK

defence manufactures are best placed to deliver security in India.

- With striking complementarities between upstream UK AI expertise and Indian demand, we will analyse what changes to data regulation will mean in the manufacturing corridor in an upcoming thought-leadership report to be published early 2019.

Digital technology, collaboration, opening defence opportunities, and ease of doing business are at the centre of UKIBC’s 2019 manufacturing advocacy strategy. Interested in finding our more? Get in touch with our sector specialist, [Prasenjit Dhar](mailto:Prasenjit.Dhar@ukibc.com) at Prasenjit.Dhar@ukibc.com

ADVANCED MANUFACTURING AND ENGINEERING IN INDIA

<p>INDIA'S AIMS TO EXPAND ITS MANUFACTURING SECTOR FROM 15% TO</p> <p>25%</p> <p>OF GDP BY 2022¹</p>	<p>INCREASED FDI LIMITS STAND AT</p> <p>49%</p> <p>WITH</p> <p>100%</p> <p>FDI POSSIBLE ON A CASE-BY-CASE BASIS²</p>	<p>INDIA FORECAST TO SPEND</p> <p>USD</p> <p>250</p> <p>BILLION</p> <p>MODERNISING ITS ARMED FORCES IN THE NEXT 10 YEARS²</p>	<p>USD</p> <p>230</p> <p>BILLION</p> <p>OF INVESTMENTS HAVE COMMITTED TO 'MAKE IN INDIA' SINCE ITS LAUNCH³</p>	<p>INDIA AIMS TO BUILD</p> <p>100</p> <p>SMART CITIES, AND IS MAKING A FURTHER</p> <p>GBP</p> <p>8.32</p> <p>BILLION</p> <p>MADE AVAILABLE TO FUND DEVELOPMENT OF CITIES ABOVE 500,000 PEOPLE¹</p>
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¹ UKIBC 'The UK and India: The Bilateral Trade Relationship' April 2018

² UK India CEO Forum Report on Bilateral Trade and Investment April 2018

³ [Make.in India](http://Make.in/India) Website



TWI Strategic Projects Lead, Shiva Sundaram in conversation with the secretary of GOI at the Department for Industrial Policy and Promotion, Ramesh Abhishek, and UKIBC Sector Manager for Advanced Engineering, Manufacturing, and Energy, Prasenjit Dhar during UKIBC's Access India Programme Roundtable in April 2018.



DIGITAL INNOVATION

In a year that began with the launch of a [UK-India Tech Partnership](#) by the Prime Ministers of both countries and culminated with our televised session during the [India-UK FutureTech Festival](#), digital innovation has underpinned every aspect of the UK-India trade and investment relationship.

Our work in this cross-cutting sector could not come at a better time as the Indian Government released its draft Data Protection Bill 2018 that borrows significantly from the EU's GDPR in developing a qualified consent and qualified access approach. Now is the right time for a regulatory framework in India and we are working with both businesses and government towards addressing concerns about data localisation and the shape of the regulatory authority in the Bill.

The introduction of the Aadhaar and the GST, alongside the spread of e-commerce and social media platforms in India, are rapidly generating a data cache promising to be the richest in the world. Whilst India has one of the fastest technology absorption rates globally, the UK is a global leader in AI and AI readiness. We are clear that this is an 'unbeatable combination' providing immense collaboration opportunities for our start-ups, universities, research centres, IT, and ITS companies.

In 2018 we brought together leading think tanks, government representatives, and businesses in a series of seminars and roundtables across sectors. Hot off the heels from our [August roundtable co-hosted with YES Bank in Mumbai](#) to explore opportunities for collaboration in fintech, we organised a London seminar in September on UK-India technology collaborations. While our [October seminar in New Delhi](#) brought these diverse applications together to examine the significance of "Indo'vation" in the UK-India relationship.

As part of our ease of doing business campaign [we ensured our Telecom Members were able to sit down with the Department for Industrial Policy and Promotion](#) in August to discuss how the Indian regulatory environment could be improved and take advantage of the UK-India Tech Partnership.

DIGITAL INNOVATION AND TECHTRADE IN 2019

Our session 'Data: The Foundation of Intelligent Economies' televised during the FutureTech Festival in December highlighted that now is the right time for India to introduce progressive data protection. This will form the platform for our digital innovation activity in 2019.

- A valuable and growing techtrade relies on free transfer of data between Data Protection regimes with mutual trust, understanding and effectiveness. This is why we will publish a report, in collaboration with the Pahle India Foundation, advocating high-quality data protection in the final Data Protection Bill that unlocks the immense potential for UK-India digital collaboration.
- A regulatory system compatible with the UK's continuation of the GDPR, including a strong regulator that regularly consults business, is vital to ensuring free data is at the centre of a future Free Trade Deal. Beyond the Bill, we will ensure businesses are a crucial, ongoing stakeholder in the formation of a new Data Protection Authority in India.

- The value of cross-border transfers of data globally already supersedes that of merchandise, making the future of free data transfer between the UK and India central to our post-Brexit, post-Indian General Election engagement strategy. Tech-Trade will therefore be a central pillar of our advocacy strategy as the UK looks towards establishing a Free Trade Deal with India.

If you are interested in finding out more or becoming involved with our digital innovation work, get in touch with our specialist, [Meghna Misra-Elder](mailto:meghna.misra-elder@ukibc.com) at meghna.misra-elder@ukibc.com



UKIBC Televised session at the India-UK Futuretech Festival in Delhi this past December kindly hosted by the Department For International Trade (DIT). Panellists include Taneia Bhardwaj, anchor & senior news editor, ET Now, Richard Heald, UK India Business Council, Dr Ashutosh Natraj, CEO, Vidrona, Larry Stone, Chairman, BT India, Bipin Preet Singh - Founder Ceo – Mobikwik, Ron Mobed, Chief Executive Officer, Elsevier and Kshitij Shah, Principal, 3One4.

COMPLEMENTING DIGITAL INNOVATION IN INDIA AND THE UK

<p>INDIA HOLDS BIOMETRIC DATA ON 1.1 BILLION CITIZENS, 337 MILLION OF WHOM HAVE SMARTPHONES¹</p>	<p>INDIA'S IT SECTOR EMPLOYS 3 MILLION DIRECTLY AND A FURTHER 10 MILLION DIRECTLY AND ACCOUNTS FOR 8% OF GDP²</p>	<p>OF THE 800 INDIAN COMPANIES IN THE UK EMPLOYING 110,000 PEOPLE, MORE THAN 20,000 ARE EMPLOYED IN THE DIGITAL ECONOMY³</p>	<p>THE UK IS THE 2ND LARGEST EXPORT MARKET FOR THE INDIAN IT-BPM INDUSTRY, WITH USD 25 BILLION EXPORT REVENUES³</p>	<p>THE UK IS EUROPE'S LEADING MARKET FOR SOFTWARE AND IT SERVICES WORTH GBP 58 BILLION ANNUALLY³</p>	<p>THE UK IS RANKED 1ST IN THE GOVERNMENT AI READINESS INDEX GLOBALLY⁴</p>
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¹ eMarketer 'More than a quarter of India's population will be smartphone users this year' May 2018

² NSDC 'Human Resources and Skill Requirements in the IT-I+TeS Sector' 2018

³ Department for International Trade Futuretech Festival 'Technologies of the Future' Session Dec 2018

⁴ Oxford Insights 'Government AI Readiness Index' 2018



HIGHER EDUCATION

With India's Higher Education sector poised for the largest reform in over two decades, we have been on the front-foot advocating for excellence, equal access, employability, and expansion in the new Higher Education Policy.

In delivering on India's ambitions for potentially the largest expansion in higher education the world has ever seen, high-quality international collaboration will be vital. From exchanging staff and students, awarding degrees (both online and offline), and establishing a physical presence through campuses in India, Indian students, institutions and employers will all benefit.

India will rightly want the best the world has to offer. This means UK Universities and Higher Education Institutions, which frequently offer the best in teaching, research, courses, as well as employability and equal access.

We made this case through our two reports published in 2018, '[India's Education Policy](#)' and '[Beyond the Top 200](#)', delivered to members of the K. Kasturirangan Committee, NITI Aayog, Universities, and top officials at the Ministry of Human Resource Development (MHRD).

We hit home what it is UK Higher Education institutions can offer India as it transforms.



UKIBC's Higher Education Delegation to India in October 2018 alongside UKIBC Higher Education Sector Manger, Tara Panjwani, UKIBC Events Manager, Kadambari Bose, and UKIBC Managing Director, Richard McCallum, during the launch of our latest Higher Education Report 'Beyond the Top 200' at a dedicated reception in Delhi.

Reinforcing this clear opportunity for Indian decision makers, [UKIBC's first Higher Education Delegation to India](#) in November took leading UK institutions to the 14th annual FICCI Higher Education Summit. Here our delegates made decisive contributions to audiences of Indian academics and industry leaders eager for change.

We not only connected delegates to leading Indian institutions including the University of Mumbai, ISME, and ISDI, [but spoke directly to the MHRD and Department of Higher Education](#) to present our latest reports.

HEIGHTENING OUR HIGHER EDUCATION AMBITIONS IN 2019

In 2019, improving access to India for our UK universities, enhancing academic-industry engagement, and broadening UK-India academic links will be front and centre of our strategy to deliver for UK and Indian Students alike.

The Sector Policy Group is now prioritising:

- Advocating for meaningful international collaboration – including being able to award degrees - to be allowed in the Government’s awaited new Education Policy Draft.
- How a social responsibility strategy can be developed for universities mirroring the ‘corporate social responsibility’.
- Connecting the needs of businesses in India with the skills of UK graduates on a long-term, sustainable basis.

We look forward to kicking off the joint Social Responsibility Strategy, launching a portal for university-industry skills transfer, and publishing a report on what the new Education Policy means for UK universities.

If you are interested in joining our Sector Policy Group and the exciting work we have planned from 2019, please get in touch with our sector specialist, [Tara Panjwani](mailto:tara.panjwani@ukibc.com) at tara.panjwani@ukibc.com

EXPANDING HIGHER EDUCATION IN INDIA

<p>14 MILLION NEW UNIVERSITY PLACES NEEDED BY 2020¹</p>	<p>1500 INSTITUTIONS ARE NEEDED BY 2030¹</p>	<p>HALF OF INDIA’S 1.25 BILLION PEOPLE ARE UNDER 25²</p>	<p>ESTIMATES PUT 30-40% OF FACULTY POSITIONS UNFILLED³</p>	<p>RESEARCH SUGGESTS 75% OF GRADUATES FROM INDIAN UNIVERSITIES ARE NOT CONSIDERED ‘EMPLOYABLE’⁴</p>
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¹UKIBC ‘[India’s Education Policy](#)’ Report March 2018

²BBC ‘[India’s Demographic Dividend](#)’ 2011

³British Council ‘[Understanding India](#)’ Feb 2014

⁴ICEF Monitor ‘[India’s Employability Challenge](#)’ Oct 2015



LIFE SCIENCE AND HEALTHCARE

In July 2018 UKIBC organised a roundtable bringing together policy makers, think tanks, and representatives from the pharmaceutical sector to launch and discuss our Report on [‘Drug Pricing in India – Regulations to Foster Innovation, Accessibility and Affordability’](#).

The report and roundtable come at a critical time for the provision of healthcare in India. The Government’s ‘Ayushman Bharat’ scheme, which aims to provide health insurance to 500 million Indians, is a game-changer for healthcare providers and, most importantly, for India’s citizens.

Both the Ayushman Bharat scheme and our members share the same objective: lowering out-of-pocket expenditure on health for citizens and households.

Central to our recommendations is designing a framework for the pharmaceutical industry that encourages innovation and ensures both affordability of and access to drugs. This will be achieved through evidence-based disease management, delinking of essential drugs from price controls, prioritising over-the-counter-drugs, speedier regulatory approvals, and improved tendering processes.

In August [we made this case directly with Government think tank, NITI Aayog, and the Secretary for the Department for Industrial Policy and Promotion \(DIPP\)](#). Ensuring key thought-leaders and Government actors are familiar with both our report and the barriers facing our pharmaceutical members has defined our strategy in 2018.

In doing so we have met key actors in the Department of Pharmaceuticals, Ministry of Health and Family Welfare, the National Pharmaceutical Pricing Authority, and the Central Drugs Standard Control Organisation to share our member’s insights.

With the launch of a new [Healthcare AI Catalyst at the India-UK Futuretech Festival](#) in December, the complementarities between UK expertise and Indian’ ambition in healthcare are immense showcasing the UK as a natural partner in expanding Indian healthcare.

COLLABORATION ON HEALTHCARE IN 2019

Delivering Ayushman Bharat will be the Government’s top priority in 2019 making our top priority to ensure reforms to drug pricing and UK-India health collaboration are front-and-centre.

- To step up our national advocacy campaign we will be putting reform to drug pricing on the agenda in our new State level interactions. The MOUs we are signing with four key States will secure unrivalled opportunity and access to influential State government officials receptive to UK business and investment needs.
- This lays the foundations for a new UKIBC Healthcare forum we are bringing together to ensure our life science and healthcare members are connected with the relevant State-level Ministers in a permanent, ongoing dialogue towards improving the long-term ease of doing business environment.

If you're interested in finding out more about our life science and healthcare advocacy, get in touch with our specialist, [Meghna Misra-Elder](mailto:meghna.misra-elder@ukibc.com) at meghna.misra-elder@ukibc.com

LIFE SCIENCES AND HEALTHCARE IN INDIA IS:

<p>WORTH USD 160 BILLION ANNUALLY¹</p>	<p>GROWING 15% ANNUALLY¹</p>	<p>PHARMACEUTICALS + MEDICAL EQUIPMENT AND SUPPLIES = 22% OF SECTOR'S TOTAL REVENUES²</p>	<p>INDIA REQUIRES 7.4 MILLION MORE HEALTHCARE PROFESSIONALS BY 2022 - THIS IS MORE THAN 2x WHAT EXISTS NOW²</p>
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¹UKIBC '[Drug Pricing in India](#)' July 2018

²NSDC '[Human Resource and Skill Requirements in the Healthcare](#)' 2018



SPORTS AND GAMING

This year we have played a central role in advocating for the integrity of sport, stamping out corruption, expanding the tax base, and stimulating more investment in the Indian economy through the promotion of an effective UK voice in Indian efforts to regulate the gaming industry.

Our [UKIBC Sector Policy Group made a powerful case for the robust regulation](#), effectively moving the debate in India from ‘should betting be regulated’ to ‘how betting is to be regulated’.

The result of our work? In July 2018, the Law Commission submitted a comprehensive and pragmatic legal framework to the Government of India recommending the legalisation and regulation of sport betting and gaming, for the first time in India. In December 2018, MP Shashi Tharoor, introduced a Private Members Bill to the Indian Parliament with the express aim of delivering this.

2019 – A YEAR TO TRANSFORM GAMING IN INDIA

With a Bill drafted, 2019 will be a key year for advocacy and representations to the Government of India to consider the shape of new regulation for sports betting and gaming.

- For the Government to deliver this effectively, studies on the size of the gaming market, backed by empirical data, is necessary but missing. To ensure this vital insight is in place, we are carrying out in-depth market research, consulting thousands of sector stakeholders and industry experts to produce a report that informs the parliamentary and government considerations.
- We will be holding roundtable discussions with between our members and Indian policy makers to enhance knowledge and support around the proposed Bill and ensure its continuity beyond the Indian General Election.
- Likewise, we have started the process of engaging with influential think tanks such as NITI Aayog, in support of the Bill, particularly on digital platforms space putting online gaming on the agenda.

Interested in becoming involve with our Sector Policy Group and advocacy agenda? Get in touch with our sector specialist Vidushpat Singhania at vidushpat.singhania@ukibc.com

SIZING UP INDIA'S SPORTS SECTOR

<p>INDIA'S SPORTS INDUSTRY IS WORTH USD 713 BILLION IN 2015¹</p>	<p>THE INDIAN PREMIER LEAGUE DRAWS 362 MILLION VIEWERS ANNUALLY AND GROWING²</p>	<p>INDIAN ONLINE GAMING INDUSTRY WILL INCLUDE 190 MILLION GAMERS AND BE WORTH USD 1 BILLION BY 2021³</p>
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¹The Diplomat 'India's Growing Sports Industry' Aug 2016

²EY 'Sports in India' July 2017

³KPMG 'Online Gaming in India' May 2017

UKIBC'S EMERGING ADVOCACY IN 2019

Whilst we have delivered unique and bespoke access for our members across numerous sectors in 2018, the new year promises new opportunities, for us to expand our advocacy, intelligence, networking, and facilitation offer for 2019. This we intend to do.



FOOD AND DRINK



MIGRATION



PROFESSIONAL SERVICES



FOOD AND DRINK

In 2018 [we took responsibility for leading the promotion of UK-India trade in food and drink on behalf of the Department for International Trade \(DIT\)](#). Hitting the ground running, in July we held our first Food and Drink roundtable in Delhi, swiftly followed by [a tour of major sector events](#) including the Cambridge Global Food Forum and the SIAL Paris.

Our newly formed UKIBC Food and Drink Advocacy Group (FDAG) already includes some of the biggest players in the food and beverage industry, and comes at a time when there is a good opportunity to shape India's emerging food and drink manufacturing regulatory landscape and engender best practice.

Currently UK-India food and drink trade is under-developed due to poor infrastructure and a complex intra-State regulatory environment. We believe this stifles investment and innovation, undermines the adoption of best practice in food standards, reduces government revenues, and ultimately impacts consumer choice.

In establishing the FDAG, expanding our Food and Drink advocacy team, signing State-level MOUs, and leading our first Food and Drink delegation (which will engage in the India Food Forum in Mumbai, and meet with the Food Safety and Standards Authority, the Ministry of Food Processing Industries, the Department for Industrial Policy and Promotion, and Invest India in Delhi) we are holding nothing back in advocating on behalf of our members.

Through expanded and deeper engagement with Central Government departments and agencies and with State Governments, our key aims for our members in 2019 are to:

- Achieve competitive success in India by reducing the regulatory burden and enhancing market access.
- Grow brand awareness and therefore market share.
- Leverage the broader bilateral relationship to accelerate regulatory reform and market access opportunities

Interested in finding out more information and becoming involved in our Food and Drink Advocacy Group? Get in touch with [Divya Dwivedi](#) at divya.dwivedi@ukibc.com

INDIA'S FOOD AND DRINK INDUSTRY

<p>WILL BE WORTH GBP 325 BILLION BY 2020</p>	<p>EMPLOYS 13 BILLION PEOPLE DIRECTLY AND 35 MILLION PEOPLE INDIRECTLY</p>	<p>IS EXPECTED TO GROW AT 18.9% CAGR BETWEEN 2017 AND 2020</p>	<p>INDIA IS THE 3 LARGEST MARKET FOR ALCOHOLIC BEVERAGES WORLDWIDE¹</p>
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¹ UKIBC '[India Food and Drink Sector Overview](#)' July 2018



MIGRATION

The publication in December 2018 of the UK Government's Immigration White Paper offers the UKIBC and our members a unique opportunity to help shape the future mobility of talent, which will underpin the trade, investment and wider bilateral UK-India relationship for years to come.

This mobility of talent includes both young Indians seeking international higher education and skilled workers seeking to contribute to the UK's economic growth.

We made the case for reform in the evidence the UKIBC submitted to the [Foreign Affairs Committee's \(FAC\) Global Britain and India Inquiry](#).

Specifically relating to attracting Indian students to UK universities, we made the case for a relaxation of the post-graduation work rules in our [evidence to the All-Party Parliamentary Group \(APPG\) for International Students Inquiry](#), which reported in November.

The [APPG's report](#) calls for the 'reset button' to be pressed and recommends that International Students be removed from Government net immigration targets and instead a clear and ambitious target should be set to grow international student numbers.

We agree, and in 2019 will be actively engaging in consultations on the UK Government's Immigration White Paper.

As well as making the case on post-graduation work visas, we will engage with the White Paper on Tier 2 visas, which allow foreign nationals to work in the UK. This is a topic that has been high on the agenda for Indian politicians and businesses for a number of years, including the UK-India CEO Forum and JETCO Working Groups, and the UKIBC will work with our members to ensure that HMG are aware of the contribution talented Indians and Indian business make to the UK economy and society.

The outcome of the UK's Immigration White Paper will be a cornerstone of a future Global Britain looking for a Free Trade deal with India, so there is much at stake and we will ensure our members' views are heard at the highest levels of UK Government as we take this work forward in 2019.

If you are interested in engaging with us to reform the UK's migration strategy, get in touch with [Oliver Rice](#) at oliver.rice@ukibc.com

LABOUR MOBILITY BETWEEN THE UK AND INDIA

<p>60% IN GLOBAL GROWTH OF OUTBOARD STUDENTS WILL BE FROM INDIA AND CHINA BY 2027¹</p>	<p>UK AWARDS MORE TIER 2 WORK VISAS TO INDIAN CITIZENS THAN EVERY OTHER COUNTRY COMBINED²</p>	<p>BETWEEN 2010 AND 2017 HIGHER EDUCATION STUDENTS FROM INDIA MORE THAN HALVED¹</p>	<p>INDIAN WORKERS RECEIVE AROUND 60% OF ALL TIER 2 VISAS THE UK ISSUES GLOBALLY²</p>
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¹ All Party Parliamentary Group for International Students Inquiry Report 'A Sustainable Future for International Students in the UK' Nov 2018

² UKIBC [Written Submission](#) to the Foreign Affairs Committee Global Britain and India Inquiry Oct 2018



PROFESSIONAL SERVICES

The UK's Legal, Financial and Professional services are world-leading. As shown in our recent '[Doing Business in India](#)' report, whilst significant improvements are being made to the operating environment in India, good professional advice is essential to guide businesses through the Indian market.

India has recently opened up some of its service sectors allowing foreign investment and business to operate. However, there are still significant limitations in the insurance sector, no opportunities for foreign law firms to operate in India, nor can architects establish a presence there.

To advocate greater openness in the Indian professional services sector, we will be showcasing the high quality in the UK professional services sector and the positive impact that could deliver for India if permitted access.

Our campaign will culminate in a report drawing together research from both UK and Indian professional service perspectives and case studies.

Through our 2019 campaign and report, we will highlight the opportunities that have been created through opening up of key service sectors to foreign businesses thus far. In India this has created jobs, increased the GVA, and enabled a significant transfer of knowledge and expertise to take place.

India stands to benefit immensely from opening up its professional services sector further, and we are poised to make the case for what UK businesses can deliver.

Membership of the UKIBC not only offers access to our high-level advocacy and events, but ensures you are at the heart of our unique network of leading companies looking for professional support in navigating the UK-India corridor.

If you are interested in finding our more, get in touch with our sector specialist, [Chris Heyes](#) at chris.heyese@ukibc.com

THE MARKET FOR PROFESSIONAL SERVICES IN INDIA

<p>1000% INCREASE IN DIGITAL TRANSACTIONS IN INDIA SINCE NOV 2016¹</p>	<p>40% OF THE INDIAN POPULATION IS UNBANKED¹</p>	<p>80% OF PAYMENTS IN INDIA ARE BY CASH¹</p>	<p>BY 2020 IT IS PREDICTED THAT 720 BILLION TRANSACTIONS WILL TAKE PACE ELECTRONICALLY IN INDIA¹</p>	<p>INDIA'S INSURANCE MARKET IS EXPECTED TO EXPAND x4 BY 2025 REACHING INR 17000 BILLION²</p>
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¹ PWC 'Fintech Trends Report India 2017'

² CII and McKinsey 'India Insurance Vision 2025' Feb 2015

ENGAGING WITH GOVERNMENT

We are uniquely connected to all levels of UK and Indian Government, both national and local administrations. This gives us an unrivalled ability to advocate on behalf of our members interests towards delivering trade, investment, growth, and jobs.

THE UK GOVERNMENT

Part of our USP is connecting with the UK Government. As well as facilitating the [CEO Forum](#), bringing the UK and India Prime Ministers together with business leaders, we provide regular updates on the state of UK-India bilateral relations to Number 10 and the Department for International Trade (DIT).

The CEO Forum, JETCO, UKIBC's televised session during the India-UK FutureTech Festival in December, and our upcoming Food and Drink Trade Mission in February are just a few highlights of how our relationship with the DIT and Secretary of State Rt. Hon Dr Liam Fox MP delivers valuable outcomes for UK businesses.

From engagements with Secretaries of State, Ministers, MPs, and Peers, such as Rt. Hon Dr Liam Fox MP, Rt. Hon Mark Field MP, Baroness Verma, and Rt. Hon Priti Patel MP to name a few, our events regularly draw insights from the highest levels of the Civil Service most relevant to our members work.



Co-Chair of the JETCO Smart Cities and Infrastructure working group and Deputy Chair of Arup, David Whittleton, sharing the stage with UK Secretary of State for International Trade, Rt. Hon Dr Liam Fox MP, and the Indian Union Minister for Commerce and Industry, Shri Suresh Prabhu.

Our advocacy operates at all levels that matter to our members. A global Britain will not be possible post-Brexit without strong, dynamic UK-India ties looking forward to not only a free-trade deal, but a free-data transfer agreement. This formed part of [the evidence we gave to the Foreign Affairs Committee Global Britain Inquiry](#) in September.

In November, the All-Party Parliamentary Group (APPG) for International Students published their report on '[A Fair Future for International Students in the UK](#)' calling for the reset button to be pressed. Our [COO, Kevin McCole, gave compelling evidence](#) to inform this inquiry and the conclusions of this report.

UK CITY REGIONS

Throughout 2018 we have worked with regions and cities across the UK including Manchester, Liverpool, the Sheffield City Region, and Leicester, helping each to identify their potential strengths for engaging the Indian market.

Whether working closely with UK city authorities on devising their India strategy or delivering bespoke delegations, we work to ensure UK regions are active and effective in Indian States.



High Commissioner of India to the UK, Ms Ruchi Ghanashyam, speaking at a UKIBC Reception in December to welcome her to the UK.

THE GOVERNMENT OF INDIA



UKIBC Group CEO, Richard Heald, OBE, shares our 'Fourth Annual Doing Business in India 2018 Report' with DIPP Secretary to GOI at the DIPP, Ramesh Abhishek, and DIPP Additional Secretary, Shailendra Singh, November 2018.

We frequently put our members needs and ambitions to leading Ministers, Secretaries and influencers across Government Departments and NITI Aayog in India.

In 2018 alone, we facilitated direct meetings with leading Ministers and Officials from the Department of Industrial Policy and Promotion (DIPP), the Ministry of Human Resources (MHRD), the Department of Pharmaceuticals, the Ministry of Commerce and Industry, the Ministry of Health and Family Welfare, the Central Drugs Standard Control Organisation, Invest India, NITI Aayog, and the High Commission of India.

In 2019 we look forward to strengthening these relationships as we build on our [agreement with the DIPP and Invest India](#) for a sustained engagement with our Advanced Manufacturing members

on the ease of doing business. We are also expanding to form new Government relationships valuable to our members particularly with the [Food Safety and Standards Authority and the Ministry of Food Processing Industries](#).

The mutual dialogue UKIBC establishes at every level of the Indian Government, and with partner Think Tanks, reinforces a valuable relationship and ensures key decision makers are aware of what UK businesses can deliver for India.

2019 will be a year of change in India. Recent State election results set the scene for a competitive General Election. Whatever happens in India's General Election, the UKIBC will be keeping members up-to-date on the latest election insights as part of our ongoing [Indian Election series of blogs and member events](#).

INDIAN STATE GOVERNMENTS

In 2018 we laid the foundations for a renewed focus on State level engagement across India. Our annual '[Doing Business in India](#)' report shows improvements in the operating environment, with variations across States as competitive federalism takes root.

Last year we hosted the Chief Minister of Haryana and his top team during their visit to the UK for an exclusive dinner with our members and a smart cities roundtable event advocating UK businesses as potential partners in delivering the State's urban development mission. This kick-started a series of [meetings in 2018 with the Chief Minister Maharashtra](#), and senior officials from Gujarat, West Bengal, Karnataka and Telangana.

Due to this 2018 groundwork, we will be leading high-level UK member delegations to meet the Chief Ministers and other top Government figures in Gujarat, Maharashtra, and West Bengal in January and February 2019, with further delegations to Telangana and Karnataka in the pipeline for later in the year.

During these visits, we will be signing MOUs with the State Governments, starting with Maharashtra, where during the 2019 Partnership Summit in January [we signed our first MOU with the Chief Minister alongside the Chief Executive of the Maharashtra Industrial Development Corporation \(MIDC\)](#). The MOU between UKIBC and MIDC increases connections between UK businesses and Maharashtra that deliver investment, jobs, and economic growth for both.

These, and future, MOUs strengthen existing ties and will serve as an important foundation to future collaboration, sharing information, and securing unrivalled access to Chief Ministers and government officials eager to build long-lasting relationships with our members. Already in Maharashtra, our MOU secured one-to-one meetings for our members with the Chief Minister and top officials, something we look forward to replicating in our next MOU with West Bengal.

46% of respondents to our 2018 Ease of Doing Business survey said they are looking to enter or expand in India in 2019. Of these 25% indicated they were looking at Maharashtra alone, whilst a remarkable 25% also indicated they were planning on expanding into North-Eastern States including West Bengal and Assam.

UKIBC's State-based strategy will increase the momentum behind ease of doing business improvements where it counts and could not come at a more important time for our members.



UKIBC Managing Director, Richard McCallum, signing our first MOU with CEO of MIDC, Dr. P. Anbalagan, in the presence of Maharashtra Minister for Industries, Shri Subhash Desai, and UK Deputy High Commissioner for Mumbai and West India and HM Trade Commissioner for South Asia, Crispin Simon, January 2019.

DELIVERING BUSINESS SUCCESS IN 2019

2019 is a critical year for UK and Indian businesses, not least due to Brexit and the Indian General Election. Whilst this makes it hard to accurately predict how the UK-India relationship will emerge from 2019, what is certain is the unprecedented opportunities will continue to exist as India develops. We predict that trade, investment and innovation collaborations will all increase, and new technologies will be central to this growth.

What are these opportunities? India's wide economic reforms including '*Digital India*' and '*Make in India*' will offer new avenues for UK India collaboration. *Ayushman Bharat*, or '*Modicare*', promises to transform healthcare in India in what promises to be the largest health insurance scheme in the world. A Private Members Bill has been tabled in India to legalise and regulated sports betting for the first time in India's modern history. Simplification of regulation and approvals driven by digitalisation continue to improve the operating environment, whilst at the State-level greater responsiveness is catalysed by "competitive federalism".

In the UK, the Government is consulting on an Immigration White Paper which has the potential to open new avenues for labour and talent mobility between the UK and India. We also eagerly anticipate the shape of India's New Education Policy and what this means for enabling meaningful international collaboration opportunities for UK universities.

In almost every sector, the UK-India corridor is on the edge of immense opportunity for both sides.

In 2018 'bilateral' defined the UK-India relationship. In 2019 'collaboration' will come to define the future of business between our two countries.

Since the UKIBC's foundation in 2007, bilateral relations have removed significant barriers to doing business as our three reports on the UK-India [bilateral trade](#), [investment](#), and [innovation collaboration](#) relationships released for Prime Minister Modi's UK visit in April 2018 outline in detail.

As these reports highlight, technology – particularly digital technology – will be the catalyst for future growth. In a digital age, the UK and India will have an 'unbeatable combination' of AI expertise and data wealth that cannot be seized alone – collaboration will be key to unlocking our joint potential.

If India strikes the right regulatory balance between maximising data opportunities and minimising data misuse, UK-India digital collaboration could see tech-trade emerge as the third pillar of international trade alongside goods and services.

This will affect every sector from manufacturing to healthcare and education. UK and Indian institutions will be able to deliver greater value through partnership in data, research, and strategy to improve business outcomes, livelihoods, and economic growth.

In harnessing this potential throughout our 2019 strategy and beyond, UKIBC places our members at the forefront of a rapidly expanding UK-India corridor.

The opportunities are significant and widespread, but they are not easy to access making our active advocacy across both countries and across sectors critical in helping to ensure businesses succeed in 2019 and beyond.

UK INDIA BUSINESS COUNCIL MEMBERSHIP

We are the leading provider of intelligence and support to UK businesses seeking to operate in India and are the top network for Indian businesses exploring opportunities in the UK.

Securing rewards in the world's most dynamic economies takes time and patience. As a member of the UK India Business Council you stay in control and accelerate rewards by taking advantage of the skills and knowledge of our team, as well as a unique network of other UKIBC members who include CEO-level executives with hands-on experience in India.

Our team comprise of sector specialists with a deep understanding of your industry and India; policy experts with know-how in political matters and regulatory issues; and a leadership team with experience, knowledge and connections to help your business succeed.

UK INDIA BUSINESS COUNCIL MEMBERS BENEFIT FROM

- Influence with governments through our policy advocacy work, including our sector and policy groups.
- Interactions with networks of other senior business leaders and political figures at our exclusive private roundtables, dinners, conclaves and other membership events.
- Intelligence from, and profile within, UKIBC reports, interactions, and our other sources.

Membership also gains you access to our sector and policy groups. These groups combined with our events programme generate insightful intelligence for our members, as well as bespoke access to like-minded businesses, speakers, contacts and content.

You can join and upgrade across three levels of membership: Corporate, Corporate Plus, and Strategic Partner (a bespoke membership package by invitation only).

UKIBC MEMBERSHIP EVENTS	CORPORATE GBP 5,000* INR 500,000*	CORPORATE PLUS GBP 10,000* INR 1,000,000*
Access to UKIBC communications channels	✓	✓
Invitations to 8 UKIBC seminars per year (4 in UK, 4 in India)	✓	✓
Invitations to 4 Insight Leaderships Programme Round tables (2 in UK, 2 in India)	✓	
Invitations to 8 Insight Leaderships Programme Round tables (4 in UK, 4 in India)		✓
Invitations to all UKIBC Sector policy group actives	✓	✓
Invitations to meetings with visiting the UK/India Indian Ministers and delegations	✓	✓
Invitations to 4 high level dinners per year (2 in the UK, 2 in India)		✓
Two exclusive half day conclaves (1 in the UK and 1 in India)		✓

*prices do not include VAT.

Interested in exploring how membership can deliver your business success, contact [Chris Heyes](mailto:chris.heyes@ukibc.com) at chris.heyes@ukibc.com



UK INDIA

BUSINESS COUNCIL

WHO ARE WE?

The UK India Business Council believes passionately that the UK-India business partnership creates jobs and growth in both countries. Through our insights, networks, and policy advocacy, we support businesses to succeed.

GET IN TOUCH

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