

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



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## INTRODUCTION

***"The potential for UK India partnership has never been greater"***

*- UKIBC Chair, Lord Davies of Abersoch, CBE, during his visit to India in March 2019.*

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

Last year, 2018, 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 to India, Sir Dominic Asquith KCMG, Secretary to the GoI at the Department for Promotion of Industry and Internal Trade, Ramesh Abhishek, and UKIBC Group CEO, Richard Heald, OBE.

Indeed, UKIBC's strategic work ensures our members - leading UK and Indian businesses 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.

In 2019 we are working with our members to maximise the UK-India partnership as the outcomes of Brexit and the Indian General Election are realised. This was the defining theme of [UKIBC's Conclave](#) in Delhi, during Lord Davies' visit to India in March, which saw industry leaders join us in outlining how business can take a proactive position.

This report proudly showcases the breadth of advocacy we are delivering 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](http://www.ukibc.com), where you can also find an online version of this report with interactive links to more of our articles and insights.

## 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 UK-India CEO Forum.



## WE PUBLISHED



8

THOUGHT  
LEADERSHIP  
REPORTS



72

UKIBC  
BLOGS AND  
ARTICLES



## OUR WORK HAS BEEN FEATURED IN

The Telegraph  
online edition

Business Standard

THE FINANCIAL EXPRESS

Bloomberg

THE ECONOMIC TIMES

FIRSTPOST.

WION

THE HINDU

CNBC  
TV18

TIMES  
NOW

4  
TODAY

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 and Trade Committee \(JETCO\)](#) – an annual bilateral meeting between the UK's Secretary of State for International Trade and their counterpart, the Indian Union Minister for Commerce and Industry.

In January 2018, over 150 UK and Indian businesses attended the [plenary session](#) 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 of 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 2018 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 2018 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 PM 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 together 40 top Chairs and CEOs from the UK and India with Prime Minister May and Prime Minister Modi.](#)

[The UK businesses who 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 the 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 the transfer of skills and education.

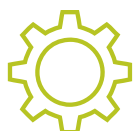
This unbeatable potential for collaboration has become core to UKIBC's strategic work connecting business and government as we carry on in 2019.



Prime Ministers Theresa May and Narendra Modi with participants during the 2018 UK-India CEO Forum.

## UKIBC'S WORK ACROSS SECTORS

UKIBC's work on JETCO, the CEO Forum, in the 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 members via exclusive Sector Advocacy Groups day-in and day-out.



**ADVANCED  
MANUFACTURING  
AND ENGINEERING**



**DIGITAL INNOVATION**



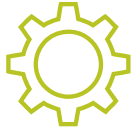
**HIGHER EDUCATION**



**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 has 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 Promotion of Industry and Internal Trade (DPIIT) in India, we [secured agreement from the DPIIT 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, 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 THROUGH 2019

- In consultation with our newly formed Advanced Manufacturing Sector Advocacy Group members, we will publish a UKIBC paper highlighting the priority opportunities and barriers.
- Alongside taking our national engagement on the Ease of Doing Business to the next level with the DPIIT, 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 defence industry, we successfully launched our Defence Sector Advocacy Group in February at the Aero India Show 2019 in Bengaluru, followed by a meeting in London between the Group members and India's Additional Secretary for the Ministry of Defence Production in April.



- Taking full advantage of our MoU's with four strategic Indian States, we will connect both National and State-level delegations to the UK with key manufacturing clusters beyond London, where members are based.

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

## ADVANCED MANUFACTURING AND ENGINEERING IN INDIA

<p>INDIA AIMS TO EXPAND ITS MANUFACTURING SECTOR FROM 15% TO</p> <p><b>25%</b></p> <p>OF GDP BY 2022<sup>1</sup></p>	<p>INCREASED FDI LIMITS STAND AT</p> <p><b>49%</b></p> <p>WITH</p> <p><b>100%</b></p> <p>FDI POSSIBLE ON A CASE-BY-CASE BASIS<sup>2</sup></p>	<p>INDIA FORECAST TO SPEND</p> <p>USD</p> <p><b>250</b></p> <p>BILLION</p> <p>MODERNISING ITS ARMED FORCES IN THE NEXT 10 YEARS<sup>2</sup></p>	<p>USD</p> <p><b>230</b></p> <p>BILLION</p> <p>OF INVESTMENTS HAVE COMMITTED TO 'MAKE IN INDIA' SINCE ITS LAUNCH<sup>3</sup></p>	<p>INDIA AIMS TO BUILD</p> <p><b>100</b></p> <p>SMART CITIES, AND IS MAKING A FURTHER</p> <p>GBP</p> <p><b>8.32</b></p> <p>BILLION</p> <p>AVAILABLE TO FUND DEVELOPMENT OF CITIES ABOVE 500,000 PEOPLE<sup>1</sup></p>
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<sup>1</sup> UKIBC 'The UK and India: The Bilateral Trade Relationship' April 2018

<sup>2</sup> UK India CEO Forum Report on Bilateral Trade and Investment April 2018

<sup>3</sup> [Make in India](#) Website



TWI Strategic Projects Lead, Shiva Sundaram, in conversation with the Secretary of the Department for Promotion of Industry and Internal Trade, 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

Last year began with the launch of the [UK-India Tech Partnership](#) by the Prime Ministers of both countries, and culminated with our televised session during the [India-UK FutureTech Festival](#) in Delhi. This year, we have launched our report '[Data: The Foundation of Intelligent Economies](#)' making the business case for India's data protection and the future of the UK-India Tech Partnership as digital innovation increasingly underpins our 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. Inspired by the EU's GDPR, it develops a 'qualified-consent, qualified-access' approach to the collection, storing, processing, and transfer of personal data. 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 Aadhaar and GST, alongside the spread of e-commerce and social media platforms in India, is 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 across several advocacy roundtables and leadership insight events. This included a [Fintech roundtable](#) co-hosted with YES Bank in Mumbai, a seminar in London on UK-India tech collaboration, and a seminar in Delhi on the significance of '[Indo'vation](#)'. In August 2018 we further [connected our Telecom members with the DPIIT](#) to discuss how the regulatory environment could be improved to take advantage of the UK-India Tech Partnership.

These interactions laid the foundations for the launch of our report, which was well-received by diverse stakeholders including NITI Aayog, representatives of both UK and Indian Governments, and business leaders at a dedicated seminar led by our Group CEO, Richard Heald, in Delhi in March 2019.

### DIGITAL INNOVATION AND TECHTRADE IN 2019

Our televised event during the India-UK FutureTech Festival in December, highlighted that now is the right time for India to introduce progressive data protection. This forms the foundation of our [report](#) and wider 2019 digital innovation strategy.

- Data protection built around liberal, intuitive, and sector-agnostic regulation, with narrowly-defined localisation requirements, and an independent, tech-savvy, and fairly-funded regulator that routinely consults data practitioners (business), is vital to ensuring trust and sustainability.
- Based on our report '[Data: The Foundation of Intelligent Economies](#)', we will work directly with the Government of India officials involved with drafting India's Data Protection Bill to improve

understanding of our recommendations, which are centred on how businesses can use data to drive India's AI ambitions.

- With the right approach to data protection in India, the potential for UK-India tech collaboration is immense, including the possibility of establishing a joint 'Data Garage' and a long-term 'Common Data Agreement' between our two countries. To drive forward the UK-India Tech Partnership on this basis, we will form a Sector Advocacy Group which will enhance the role of business.

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](mailto:meghna.misra-elder@ukibc.com)



UKIBC televised session at the India-UK FutureTech Festival in Delhi in December 2018 kindly hosted by the Department for International Trade (DIT). Panellists include: Taneia Bhardwaj, ET Now Anchor and Senior News Editor; Richard Heald, OBE, UKIBC Group CEO; Dr Ashutosh Natraj, Vidrona CEO; Larry Stone, BT India Chair; Bipin Preet Singh, Mobikwik Founder and CEO; Ron Mobed, former Elsevier CEO; and Kshitij Shah, 3One4 Capital Principal.

## COMPLEMENTING DIGITAL INNOVATION IN INDIA AND THE UK

<p>INDIA HOLDS BIOMETRIC DATA ON</p> <p><b>1.1</b></p> <p>BILLION CITIZENS, 337 MILLION OF WHOM HAVE SMARTPHONES<sup>1</sup></p>	<p>INDIA'S IT SECTOR EMPLOYS</p> <p><b>3</b></p> <p>MILLION DIRECTLY, AND A FURTHER 10 MILLION INDIRECTLY, ACCOUNTING FOR</p> <p><b>8%</b></p> <p>OF GDP<sup>2</sup></p>	<p>OF THE</p> <p><b>800</b></p> <p>INDIAN COMPANIES IN THE UK EMPLOYING 110,000 PEOPLE, MORE THAN</p> <p><b>20,000</b></p> <p>ARE EMPLOYED IN THE DIGITAL ECONOMY<sup>3</sup></p>	<p>THE UK IS THE</p> <p><b>2<sup>ND</sup></b></p> <p>LARGEST EXPORT MARKET FOR THE INDIAN IT-BPM INDUSTRY, WITH</p> <p>USD</p> <p><b>25</b></p> <p>BILLION EXPORT REVENUES<sup>3</sup></p>	<p>THE UK IS EUROPE'S LEADING MARKET FOR SOFTWARE AND IT SERVICES WORTH</p> <p>GBP</p> <p><b>58</b></p> <p>BILLION ANNUALLY<sup>3</sup></p>	<p>THE UK IS RANKED</p> <p><b>1<sup>ST</sup></b></p> <p>IN THE GOVERNMENT AI READINESS INDEX GLOBALLY<sup>4</sup></p>
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<sup>1</sup> eMarketer 'More than a quarter of India's population will be smartphone users this year' May 2018

<sup>2</sup> NSDC 'Human Resources and Skill Requirements in the IT-ITeS Sector' 2018

<sup>3</sup> Department for International Trade Futuretech Festival 'Technologies of the Future' Session Dec 2018

<sup>4</sup> 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 includes UK universities and Higher Education Institutions, which frequently offer the best in teaching, research, and 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 that 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 Manager, 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 14<sup>th</sup> 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 India students alike.

The Sector Advocacy Group is now prioritising:

- Advocating for meaningful international collaboration - including being able to award degrees - we will analyse what the Govt's awaited new Education Policy draft will mean for UK universities.
- Following the April 2019 [University Social Responsibility Conference in Hyderabad](#) which we co-delivered with the University of East Anglia and the University of Hyderabad, we will work with universities and corporates to share insights into social responsibility.
- Connecting the needs of businesses in India with the skills of UK graduates on a long-term, sustainable basis was a priority for our [HE delegation](#) roundtable, and [highlighted by our Chair](#), Lord Davies, during his visit to India in March this year. In a tangible step towards this, we will [launch an online portal](#) matching the skill needs of Indian companies with those that can be provided by UK universities.

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

## EXPANDING HIGHER EDUCATION IN INDIA

<b>14</b> MILLION NEW UNIVERSITY PLACES NEEDED BY 2020 <sup>1</sup>	<b>1500</b> INSTITUTIONS ARE NEEDED BY 2030 <sup>1</sup>	HALF OF INDIA'S <b>1.25</b> BILLION PEOPLE ARE UNDER 25 <sup>2</sup>	ESTIMATES PUT <b>30-40%</b> OF FACULTY POSITIONS UNFILLED <sup>3</sup>	RESEARCH SUGGESTS <b>75%</b> OF GRADUATES FROM INDIAN UNIVERSITIES ARE NOT CONSIDERED 'EMPLOYABLE' <sup>4</sup>
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<sup>1</sup>UKIBC 'India's Education Policy' Report March 2018

<sup>2</sup>BBC 'India's Demographic Dividend' 2011

<sup>3</sup>British Council 'Understanding India' Feb 2014

<sup>4</sup>ICEF 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. Drug pricing reform and innovation-friendly data protection will be key to ensuring UK collaboration delivering the schemes ambitions.

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 DPIIT](#). 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.

After attending the [India-UK Healthcare Conference](#) in Birmingham in March this year, at which we connected with the High Commissioner of India to the UK and the CEO of India's National Health Authority leading on Ayushman Bharat, it is clear that there are immense and increasingly tangible ways in which the UK is a natural partner in expanding Indian healthcare quality and quantity.

## COLLABORATION ON HEALTHCARE IN 2019

Delivering Ayushman Bharat will be the Government's top priority in 2019 making it essential 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.
- Our State-level MoUs will also enable us to carry out research on attitudes to smoking in India in order to improve perceptions, understanding, and regulatory dialogue on e-cigarettes and health-tech among the stakeholders that matter.

- UK-India tech collaboration through cluster-to-cluster partnerships and a potential joint ‘Data Garage’ could deliver immense impact in the healthcare sector. This is the case we make in our report, [‘Data: The Foundation of Intelligent Economies’](#), and will be central to connecting our Advocacy Groups with regulators and Government of India officials.

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

## LIFE SCIENCES AND HEALTHCARE IN INDIA IS:

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

<sup>2</sup> NSDC [‘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 Advocacy Group made a powerful case for the robust regulation](#), effectively moving the debate in India from 'should betting be regulated' to 'how should betting 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 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 involved with our Sector Advocacy Groups and advocacy agenda? Get in touch with our sector specialist Vidushpat Singhania at [vidushpat.singhania@ukibc.com](mailto:vidushpat.singhania@ukibc.com)

### SIZING UP INDIA'S SPORTS SECTOR

<p>INDIA'S SPORTS INDUSTRY IS WORTH USD</p> <p><b>713</b></p> <p>BILLION IN 2015<sup>1</sup></p>	<p>THE INDIAN PREMIER LEAGUE DRAWS</p> <p><b>362</b></p> <p>MILLION VIEWERS ANNUALLY AND GROWING<sup>2</sup></p>	<p>INDIAN ONLINE GAMING INDUSTRY WILL INCLUDE</p> <p><b>190</b></p> <p>MILLION GAMERS AND BE WORTH USD 1 BILLION BY 2021<sup>3</sup></p>
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<sup>1</sup>The Diplomat 'India's Growing Sports Industry' Aug 2016

<sup>2</sup>EY 'Sports in India' July 2017

<sup>3</sup>KPMG '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). Since then, we have hit the ground running from our first Food and Drink roundtable in Delhi in July last year to our first [Food and Drink Trade Mission](#) to India in February 2019.

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.

UK-India food and drink trade is currently 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 trade mission, we are holding nothing back to advocate for our members. [The mission](#), led by Food and Drink Federation Chief Executive, Ian Wright, took part in the India Food Forum 2019, meeting with the Food Safety and Standards Authority, the Ministry of Food Processing Industries, the DPIIT, and Invest India.

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](mailto:divya.dwivedi@ukibc.com)

## INDIA'S FOOD AND DRINK INDUSTRY

<p>WILL BE WORTH GBP <b>325</b> BILLION BY 2020</p>	<p>EMPLOYS <b>13</b> BILLION PEOPLE DIRECTLY AND 35 MILLION PEOPLE INDIRECTLY</p>	<p>IS EXPECTED TO GROW AT <b>18.9%</b> CAGR BETWEEN 2017 AND 2020</p>	<p>INDIA IS THE <b>3<sup>RD</sup></b> LARGEST MARKET FOR ALCOHOLIC BEVERAGES WORLDWIDE<sup>1</sup></p>
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<sup>1</sup> 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 the 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.

This is the case we are making directly to the UK Immigration Minister as we seek to influence Home Office consultations. We will also engage on the White Paper regarding Tier 2 visas, which allow foreign nationals to work in the UK. This is high on the agenda for Indian politicians and businesses as highlighted at the UK-India CEO Forum and JETCO Working Groups. The UKIBC will work with members to ensure that HMG are aware of the contribution talented Indians and Indian businesses make to the UK.

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](mailto:oliver.rice@ukibc.com)

## LABOUR MOBILITY BETWEEN THE UK AND INDIA

<p><b>60%</b></p> <p>IN GLOBAL GROWTH OF OUTBOARD STUDENTS WILL BE FROM INDIA AND CHINA BY 2027<sup>1</sup></p>	<p>UK AWARDS MORE</p> <p><b>TIER 2</b></p> <p>WORK VISAS TO INDIAN CITIZENS THAN EVERY OTHER COUNTRY COMBINED<sup>2</sup></p>	<p>BETWEEN 2010 AND 2017 HIGHER EDUCATION STUDENTS FROM INDIA MORE THAN</p> <p><b>HALVED<sup>1</sup></b></p>	<p>INDIAN WORKERS RECEIVE AROUND</p> <p><b>60%</b></p> <p>OF ALL TIER 2 VISAS THE UK ISSUES GLOBALLY<sup>2</sup></p>
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<sup>1</sup> All Party Parliamentary Group for International Students Inquiry Report 'A Sustainable Future for International Students in the UK' Nov 2018

<sup>2</sup> 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 the 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 out more, get in touch with our sector specialist [Chris Heyes](#) at [chris.heyas@ukibc.com](mailto:chris.heyas@ukibc.com)

## THE MARKET FOR PROFESSIONAL SERVICES IN INDIA

<b>1000%</b> INCREASE IN DIGITAL TRANSACTIONS IN INDIA SINCE NOV 2016 <sup>1</sup>	<b>40%</b> OF THE INDIAN POPULATION IS UNBANKED <sup>1</sup>	<b>80%</b> OF PAYMENTS IN INDIA ARE BY CASH <sup>1</sup>	BY <b>2020</b> IT IS PREDICTED THAT <b>720</b> BILLION TRANSACTIONS WILL TAKE PACE ELECTRONICALLY IN INDIA <sup>1</sup>	INDIA'S INSURANCE MARKET IS EXPECTED TO EXPAND x4 BY 2025 REACHING INR <b>17000</b> BILLION <sup>2</sup>
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<sup>1</sup> PWC '[Fintech Trends Report India 2017](#)'

<sup>2</sup> 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 [UK-India CEO](#), 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 UK-India CEO, 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.

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. Building strong and lasting relationships between UK regions and Indian States will be core to launching successful cluster-to-cluster partnerships in the future.



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

## THE GOVERNMENT OF INDIA

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

In 2018 alone, we facilitated direct meetings with leading Ministers and Officials from the Department for Promotion of Industry and Internal Trade (DPIIT), 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.

This level of interaction has only gathered momentum in 2019 following one-to-ones with the CEO of MyGov, both the Minister and Secretary of DPIIT, and the Chief Executive of Invest India to name a few. We look forward to strengthening our relationship with the [DPIIT and Invest India](#) on the ease of doing business, and expanding to form new Government relationships valuable to our members including with MyGov, the [Food Safety and Standards Authority](#), and the [Ministry of Food Processing Industries](#).



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

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 and started 2019 with a series of interactions with Chief Ministers in Maharashtra, Gujarat, and West Bengal.

In May, we hosted the Chief Minister of Haryana and his team in the UK for a roundtable showcasing the UK's smart cities expertise, followed by an event connecting UK investors to the Haryana team on the ease of doing business and emerging opportunities.

We also held a series of meetings across India in 2018, including with senior officials from Gujarat, West Bengal, Karnataka and Telangana, and with the [Chief Minister of Maharashtra](#).

As our fourth annual '[Doing Business in India](#)' report shows, there have been important improvements in the ease of doing business in India. However, this varies across States, creating an uneven operating environment for UK and Indian businesses.

This led UKIBC to sign and deliver MoUs with [Maharashtra](#), [West Bengal](#), and [Telangana](#) during the first three months of 2019, with a further MoU in the pipeline with Karnataka. Working with these strategically important States, we aim to facilitate important ease of doing business reform.

These MoUs are designed to focus on key complementary sectors and strengthen information, influence, and access between the businesses seeking to expand and the State Ministers looking to attract effective investment. All the while, we remain actively engaged with a wide group of States, including Gujarat where we held a [roundtable with the Chief Minister](#) in January this year.

UKIBC's State-based strategy will increase the momentum behind ease of doing business improvements where it counts at an important time for our members.



UKIBC Group CEO, Richard Heald, OBE, signs an MoU with the West Bengal Industrial Development Corporation Managing Director, SMT. Vandana Yadav, in the presence of the Hon'ble Chief Minister of West Bengal, Mamata Banerjee, and West Bengal Finance Minister, DR. Amit Mitra.



## 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 that 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 regulate 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 Advocacy Groups.
- Interactions with networks of other senior business leaders and political figures at our exclusive 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 Advocacy 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 advocacy group activities	✓	✓
Invitations to meetings with visiting the UK/India Indian Ministers and delegations	✓	✓
Invitations to 4 high level dinners per year (2 in UK, 2 in India)		✓
Two exclusive half day conclaves (1 in UK and 1 in India)		✓

\*prices do not include VAT or GST.

Interested in exploring how membership can deliver your business success? Contact [Chris Heyas](mailto:chris.heyas@ukibc.com) at [chris.heyas@ukibc.com](mailto:chris.heyas@ukibc.com)



## 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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