



सत्यमेव जयते
Ministry of Information & Broadcasting
Government of India



Confederation of Indian Industry



11th BIG PICTURE SUMMIT 2022

16-17 November 2022, LE MERIDIEN New Delhi
The New Reset: Changing Face of Indian M&E Industry

POST SHOW REPORT



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THE NEW RESET: CHANGING FACE OF INDIAN M&E INDUSTRY

Taking forward the vision of the Government of India for Indian M&E industry to play a larger role in the Global Media and Entertainment landscape, CII's flagship event in media & entertainment – THE BIG PICTURE SUMMIT brought together luminaries and thought leaders to deliberate upon the changes that the industry is witnessing and to paint the roadmap to enable the industry to achieve exponential growth in these fast-changing times.



Big Picture Summit brings together stakeholders from Indian Government, Industry as well as Internationally renowned experts on one platform across different industry verticals – Broadcasting, Streaming, Films, Animation and Visual Effects, News, Advertising, and Music.

Sessions received participation from content creators, broadcasters, studios, production companies, publishers, distributors, international film commission, government officials, regulators, etc.

On the theme of “**The New Reset: Changing Face of Indian M&E**”, discussions at Big Picture Summit 2022 held around global trends and opportunities; bounce-back of revenues to pre-pandemic levels; domestic consumer preferences and local opportunities for global audience through digital platforms which have never existed before – especially for creative industry, storytellers, and technology providers. Also,

different profile of media and entertainment related businesses and revenue models emerging in the digital space after the recent rollout of 5G were discussed in the Summit.

The event was aimed at providing an ideal platform for industry stakeholders, policy makers, regulators, and industry associations to discuss issues related to the industry and identify possible solutions and help to chalk out future road map for the development of this sector.

Over 70 speakers shared their perspectives on a wide range of issues such as talent pipeline, policy regime and creative freedom. Subjects including emerging new technology, content creation, skilling, streaming, Indian cinema, piracy & illegal sharing of content, OTT for regional content, sports broadcasting, advertising, Indian AVGC sector and role of states were also taken up. The Summit delved into subjects such as films, television broadcasting, advertising, animation, gaming, visual effects, and OTT. Unique sessions such as Shoot in Spain, fireside chats with leading OTT actors, case studies of immersive cinema, and trends in broadcasting and digital medium added to the conference.

A high-level business delegation from Spain participated in the Summit. The Summit witnessed signing of the MoU between Film Federation of India and Spain Film Commission, to facilitate the use of the Co-Production Treaty between India and Spain and promote filming locations in both the nations.

KEY HIGHLIGHTS

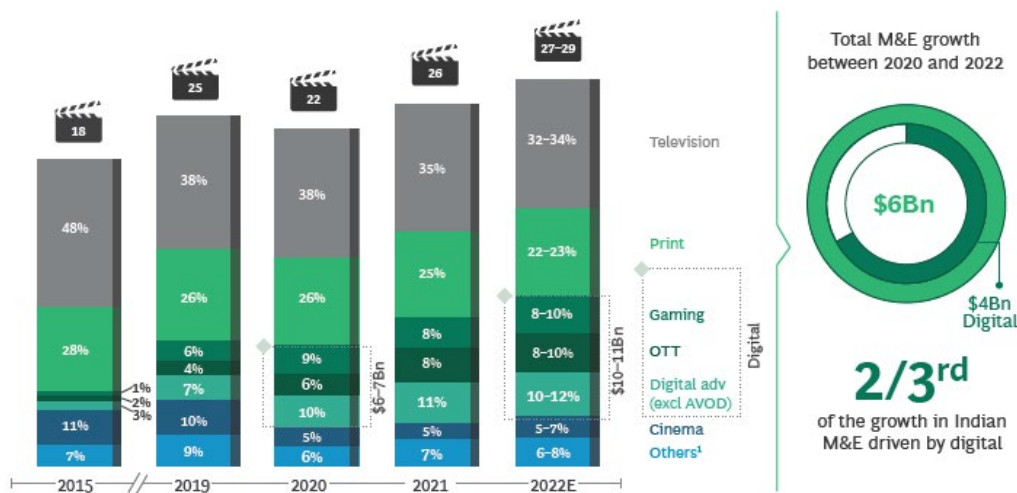
- Dialogue with key Government and Industry professionals in Media and Entertainment from India and internationally.
- Understanding global and local trends in the Media and Entertainment sector
- Exploring new technology and services in Animation, AR, VR, Advertising, broadcasting and Digital.
- Networking with industry stalwarts, M&E professionals, filmmakers, etc.
- Access to cutting edge ideas and discussions.
- Deliberations of the way forward and what the future has in store for this sector.
- Release of Industry Reports

RELEASE OF REPORTS

Two reports were released by the Minister. The first was a **CII-BCG report on Media & Entertainment titled -Shaping the Future of Indian M&E**. It provides an in-depth research and analysis on the Indian M&E Industry and the way forward. The second report was a **CII-IBDF-KPMG report on Sports Broadcasting on TV**. It highlights the growth drivers for sports broadcasting in India, the future growth potential and how the various players in the value chain stand to gain from it.

Growth trajectory continues with Digital leading the way and contributing to 2/3rd of the growth

Indian Media & Entertainment industry market size (\$Bn)



1. Others includes Animation & VFX, OOH, Audio; Print includes newspapers, magazines & books
All years mentioned are calendar years;
Overall numbers revised from last year report basis additional analysis & change in Audio segment market sizing
Source: MagnaGlobal, PQ Media, Ampere, Ormdia, BCG analysis

4 key trends shaping the M&E industry

01

M&E increasingly catering to "ME" choices



- Digital video & gaming leading the boom with >40% of total media consumption in 2022 backed by growth in internet & smartphone penetration
- Ease of accessing content across any device, strong preference for regionals and micro genres

02

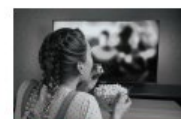
Two-way interactive media piques interest



- Average time spent on interactive episodes ~20% higher than normal episodes

03

Snackable content grabs attention



- Preference for more snackable content increasing driven by reduction in attention span. E.g. SFV MAU's have grown by 30-35%

04

Premium content finding more traction



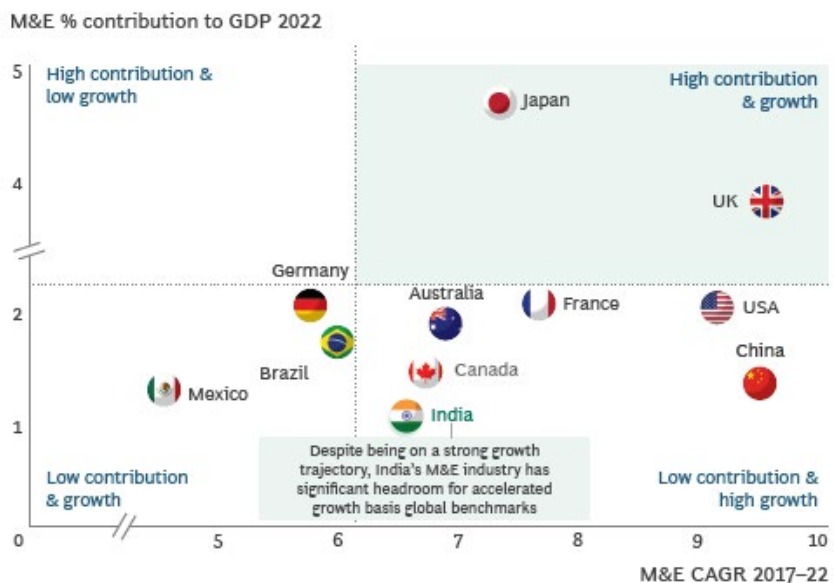
- SVOD subscriptions have grown to 85-90 Mn in 2022, an increase of 16x-17x over past 5 years
- Increasing willingness to pay for premium/exclusive content (Sports, Tent Poles) & experience (Personalization)

The Media & Entertainment (M&E) industry has seen a good comeback from COVID lows and is back to its pre-COVID growth trajectory. As per the latest CII-BCG report, the Indian M&E Industry is estimated at USD 27-29 billion in 2022. With the Industry witnessing strong growth tailwinds, it is poised to grow to USD 55-65 billion by 2030 with a potential to reach USD 65-70 billion, majorly driven by growth in OTT and gaming. Over the years, the M&E industry has evolved considerably and has seen rapid changes, fuelled by accelerated technological progress and evolving consumer behaviours. The pandemic precipitated several emerging consumer trends, ranging from accelerated digital consumption to the rise of interactivity. Some of these emerging trends are likely to have long term implications for the industry. Within the M&E sector, attractive opportunities exist in several parts of the media segment. The OTT sphere has exploded with strong subscription growth and increased investments in content. On the back of rising interest in interactivity, gaming continues to show promising growth.

Despite strong growth and increasing share of GDP, large headroom exists

Indian M&E % share of GDP has increased in the last 5 years...

...but India still lags global peers, indicating potential upside



1. Both GDP and M&E numbers are nominal 2. M&E Industry includes both consumer spends and advertisement revenues
Source: MafnaGlobal, POMedia, EIU, Expert discussions, BCG analysis

KEY SPEAKERS

**Shri Piyush Goyal**

Hon'ble Minister
of Commerce &
Industry

**Apurva Chandra**

Secretary, Ministry
of Information &
Broadcasting

**Dr P.D Vaghela**

Chairman, Telecom
Regulatory of India
(TRAI)

**K Madhavan**

Chairman, CII National
Committee on M&E
Country Manager &
President Disney Star

**Biren Ghose**

VC, CII National
Committee on M&E
and Country Head -
Technicolor India

**Gaurav Banerjee**

Head- Content,
Disney+ Hotstar &
HSM Entertainment
Network

**Gaurav Gandhi**

Vice President
Prime Video, India

**Mihir Rale**

Chief Regional
Counsel Disney
Star

**Sam Balsara**

Chairman and MD
Madison World
and Madison

**Sanjay Wadhwa**

Founder,
AP International

**Senthil Kumar**

Co-Founder, Real
Image

**Shibasish Sarkar**

Chairman & CEO,
International
Media Acq Corp &
President,
Producers Guild of
India

**Avinash Pandey**

CEO
ABP Network

**Blaise Fernandes**

CEO
Indian Music
Industry

**Bobby Bedi**

Founder
Content Flow
Studios

**Bhawana Somaaya**

Renowned Film
critic



Kaveree Bamzai
Indian Film Critic
and Columnist



Munjal Shroff
Director & COO,
Graphiti
Multimedia Pvt. Ltd.



Neeraj Roy
CEO, Hungama
Digital
Media &
Entertainment



Punit Misra
President, Content &
International Business,
Zee Entertainment
Enterprises Ltd



Soumya Mukherjee
Chief Operating
Officer
hoichoi (India &
Bangladesh)



Subhash Ghai
Indian Film
Director
Producer and
Screenwriter



Suhel Seth
Columnist,
Founder &
Managing Partner,
Counselage India



Vinay Singhal
Co-founder & CEO
Stage-OTT for
Bharat



Rahul Vatts
Chief Regulatory
Officer Airtel



Sameer Nair
CEO
Applause
Entertainment



G Srikanth Rao
Managing Director,
Industry Lead -
Media, Software &
Platforms Practice,
Accenture



John Dykes
Broadcaster and
Content
Strategist



Carlos Rosado
President
Spain Film
Commission



Ashish Kulkarni
Founder & CEO
Punnaryug Artvision
& Screenyug
Creations

Shri Piyush Goyal, Minister of Commerce & Industry, Consumer Affairs, Food & Public Distribution, and Textiles, Government of India lauded the efforts of the industry during the pandemic in delivering content, providing entertainment, and disseminating important information when much of the world was shut down. He also mentioned that the Government is working on extending support to the industry and has increased the Foreign Direct Investment limit to allow 100% foreign ownership to attract technology and relevant companies from around the world to India. He added that India needs to diversify into newer markets and create better ecosystems by providing new canvasses for creativity to flourish. He stressed on the need of introducing more skill development courses and educational courses to bring in talent, to be able to produce content at par with international standards. He urged the industry to collectively work with all stakeholders to showcase the soft power of India and showcase India's strengths and rich culture to the rest of the world.



SUMMIT PROCEEDINGS

Shri Apurva Chandra, Secretary, Ministry of Information and Broadcasting, Government of India stated that the Ministry of Information and Broadcasting, along with the Indian Media and Entertainment industry, has set a goal of making the M&E sector a USD 100 billion worth industry by 2030. Shri Chandra mentioned the announcement by the Ministry on the incentive policy for cinema at the Cannes Film Festival this year, out of which many proposals have been accepted for foreign production in India. The secretary informed that the Ministry has recently revised the guidelines for unlinking and downlinking of satellite television channels in India to ease the burden of compliance on channels. The AVGC Task Force has completed its deliberations and the recommendations of the report would be actioned shortly, he stated.

Ms Neerja Shekhar, Additional Secretary, Ministry of Information & Broadcasting, Government of India mentioned that the way content is consumed is important. The TV and entertainment industry has the target to cover 100% households. She said that Free Dish is a very successful initiative of Prasar Bharti and Doordarshan and will play a seminal role in reaching education to the masses.

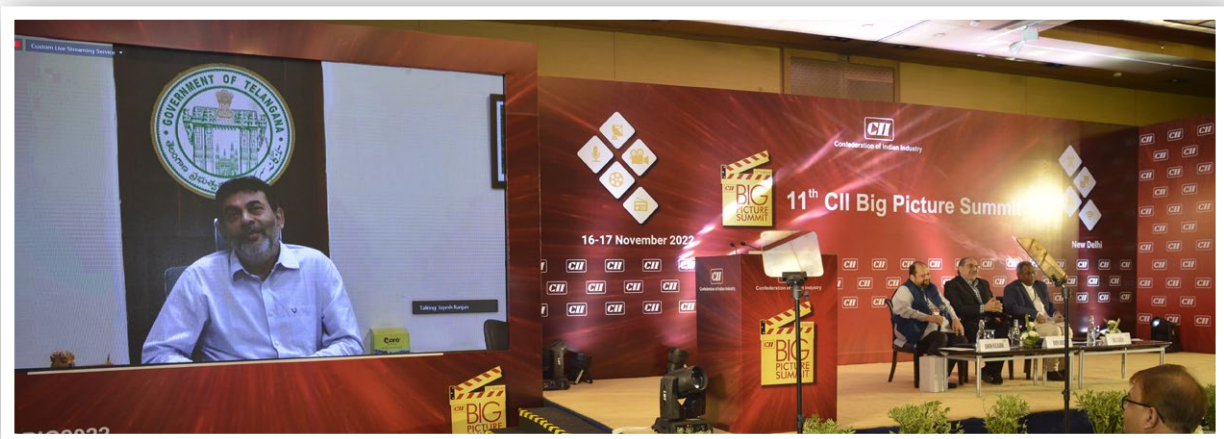


Shri Prithul Kumar, Joint Secretary (Films), Ministry of Information & Broadcasting, Government of India mentioned that viewership of Indian content is not just in India but all over the world. With Metaverse, the growth prospect for the sector has catapulted.



On the issue of piracy and illegal sharing of content, Dr Deepali Sharma, Additional Director (BP&L), Ministry of Information and Broadcasting, Government of India said that piracy is the flipside of people having access to connectivity and makes the industry vulnerable to losses.

Shri Sanjiv Shankar, Joint Secretary (Broadcasting), Ministry of Information & Broadcasting, Government of India, stressed on the Broadcast Seva portal, which offers a single point facility to various stakeholders and applicants to apply for various permissions, registrations, licenses etc., for the development and integration of the broadcast industry.



Jayesh Ranjan, Principal Secretary, Government of Telangana

Shri Jayesh Ranjan, Principal Secretary, Government of Telangana, highlighted the initiatives taken by the State Government to facilitate the AVGC industry. This was hugely facilitated by the Image Policy in 2015 by the Telangana Government, he said. The policy provides the AVGC industry with high class infrastructure such as the image tower, with provision for training schools, motion capture studios, green studios, and other useful provisions. The Telangana Government is also talking to foreign universities to set up centres.

Dr P D Vaghela, Chairman, Telecom Regulatory Authority of India (TRAI) mentioned that the Government needs to come out with policies that are flexible in nature and allow new players to easily enter the sector, while at the same easing up regulations for the traditional sector.

Shri Anil Bharadwaj, Advisor, TRAI said that while TRAI is trying to enable a positive, consultation-based, industry friendly approach with regards to New Tariff Order (NTO), the industry needs to focus on building capacities and Centres of Excellence.



Shri V Raghunandan, Secretary, Telecom Regulatory Authority of India spoke about the communication industry which reached from 1G to 5G in a relatively short span of time, denoting the disruptive nature of technology. He stressed that the goal of TRAI is to have limited intervention and simultaneously find solutions to the issues being faced by the industry.

Mr K Madhavan, Chairman, CII National Committee on Media & Entertainment and Country Manager & President, Disney Star urged the Government to introduce a comprehensive national broadcasting policy to ensure the growth of the M&E sector. He further urged that the Government provide the necessary incentives for making India a preferred location for international films.



Mr Biren Ghose, Vice Chairman, CII National Committee on Media & Entertainment & Chair, CII Sub Committee for AVGC & Immersive Media and Country Head, Technicolor India, assured that the industry is working towards showcasing the soft power of India, in alignment with the vision of the Prime Minister of India. He also commended the way the Ministry of Information and Broadcasting is working inter-ministerially which, along with the efforts of all the stakeholders, has resulted in the creation of conducive policies.



Vikram Sahay, Joint Secretary, Ministry of Information & Broadcasting spoke about the Khelo India & Fit India movement which have been taken through the country and everybody has got involved has really helped the athletes in their performances nationally & internationally



Mr Neeraj Roy, CEO, Hungama Digital highlighted that a huge amount of time is being spent on gaming and thus it is important to come up with a policy that encourages entrepreneurs to create exciting virtual games, both for the domestic and the international market. According to Mr Roy, AVGC Industry has the potential to replicate the success story that the software industry attained about 30 -35 years ago.

Mr Gaurav Gandhi, Vice President, Prime Video, stated that there is huge amount of investment in OTT. He stated that streaming changed three things. First, people spent more time viewing content; second, non-streamers have also started streaming and third, viewers have started absorbing content in different languages.

Mr Blaise Fernandes, President & CEO, Indian Music Industry stated that consumers' attention has become split between social media content and other apps, and viewers are spoilt for choice. However, cinema has survived for long time and is here to stay, he opined.

Mr Carlos Rosado, President of Spain Film Commission said that Indian cinema has been the portal through which the world has been familiarized with the rich culture and heritage of India. He further suggested that it will be useful for the industry in both countries to have a closer collaboration.

The Big Picture Summit concluded with a special session that celebrated 80 years of the legend of Indian cinema, Mr Amitabh Bachchan by going through his journey in the Indian film industry. People who were deeply associated with his career joined the conversation. Ms Bhavna Sommaya, Author was in conversation with to Mr. Ramesh Sippy, renowned film director and producer and Mr Sameer Nair, CEO, Applause Entertainment, and discussed the phenomenal career of Mr Bachchan.



KEY TAKEAWAYS

- Despite the availability of a huge talented work force, India currently has only a 1% share in the global AVGC sector. The industry can target 5% global market share in the next five years, with a potential to create 1,60,000 jobs.
- The M&E sector in the country has undergone several radical changes and is experiencing a paradigm shift due to advancement of technologies and innovations in the creation, distribution, and consumption of media.
- The traditional media would lose its ground unless it understands, adopts, and merges its business models with the changing preferences of the society, and new technologies such as Artificial Intelligence (AI), Machine Learning and others that are being unleashed.
- Light touch regulation is the need of the hour for the Media & Entertainment industry.
- There is a need for self-regulation within the media and entertainment industry on content. In the absence of self-regulation, society would seek Government intervention.
- TRAI is in the process of framing the recommendations on the issues related to media ownership.
- TRAI will soon release consultation papers on recommendations for FM Radio.
- The Ministry of Information & Broadcasting will start working on the recommendations which have come out from the deliberation of AVGC Taskforce, launched as a part of the Union Budget 2022.
- The Government of India is working towards attracting more and more foreign artists to come in India to shoot content. It is to provide the necessary incentives for marking India a preferred location for international films.
- There is a need to simplify the process of granting production permits through a Single Window System
- The industry requested that a comprehensive National Broadcasting Policy be announced by the Government to ensure the growth of the M&E sector.
- Broadcast Seva portal offers a single point facility to various stakeholders and applicants to apply for various permissions, registrations, licenses etc., for the development and integration of the broadcast industry.
- Theatre and streaming are symbiotic and not on opposite ends. A major chunk of advertising money is being spent on the digital medium.

- A big production budget for advertising is a thing of the past.
- Advertising is no longer about the consumer. It is about the client. In this way, advertising suffers as the consumer is sidestepped and disregarded.
- There is a need to make the legal framework for media and entertainment much more contemporary to drive growth.
- The industry needs to carefully introspect on novel entertainment avenues such as gaming and betting and decide levels of engagement that may be permitted. A balance must be struck, so that the newer entertainment models do not adversely affect Indian culture.
- Stakeholders of the media & entertainment sector must function independent of the Government as much as possible. The Government's role should be to support, facilitate and enable the sector to the best possible extent.
- Industry should leverage the strength of Indian talent, competitiveness, and quality of work to capture the global market.
- Ministry of Information and Broadcasting intends to work through inter-ministerial collaboration, along with the efforts of all the stakeholders, in promotion of Indian AVGC and in creation of relevant policies.

SESSIONS



**THE NEW
DIGITAL POLICY
LANDSCAPE AND
ITS IMPACT ON THE
M&E SECTOR**



**REFORMS IN THE
TV BROADCASTING
SECTOR -
OPPORTUNITIES FOR
THE FUTURE**



**AVGC TASKFORCE:
NEXT STEPS FROM
THE INDUSTRY**



**STATES AS
MERGING GROWTH
CENTRES OF M&E
ACTIVITIES**



**THE CHANGING
FACE OF INDIAN
CINEMA**



SHOOT IN SPAIN



**ROLE OF OTT
IN PROMOTING
NICHE & REGIONAL
CONTENT**



**IMPACT OF PIRACY
AND ILLEGAL
SHARING OF
CONTENT**



**ROLE OF
BROADCASTING
IN PROMOTING
SPORTS IN INDIA**



**CHANGING FACE
OF ADVERTISING**



**RESHAPING THE
M&E SKILLING
LANDSCAPE IN
INDIA**



**THE PHENOMENA
CALLED AMITABH**

INDUSTRY VOICES

"The demand for content is ever increasing. The nature of content consumption may change, which causes ups and downs in the economics and the pricing."

Anuj Gandhi, Media & Entertainment Consultant



"Technology has accelerated the speed of change and there is a definite change in the way we engage across multiple devices."

G Srikanth Rao, Managing Director, Industry Lead, Media, Software & Platform-Practice, Accenture



"What Kaun Banega Crorepati (KBC) did right is that it got Amitabh Bachchan in touch with the audience, and being Bachchan, he warmed up to the audience."

Samir Nair, CEO, Applause Entertainment



"Television is moving from a family platform to a more personalized platform. Increasing connected devices within homes is leading to doubling amount of content, consumption time and also create further fragmentation of audiences watching content."

L.V. Krishnan, CEO, TAM Media Research



"The purpose of advertising is to invent desire. It is not to inform. Advertising is about creating magic and engaging the consumer with the brand through the medium of creativity."

Suhel Seth, Columnist, Founder & Managing Partner, Counselage



"Advertising has undergone a change, because earlier we were worried about changing people's thoughts and beliefs. With tech and digital coming in, this has altered to some extent."

Rohitash Srivastava, Head of Strategic Planning, Ogilvy-India



"Advertisers act like the gas to fuel the economy or are like the machinery that keeps the wheel of economy moving."

Sam Balsara, Co-Chair, CII Sub Committee on Advertising and Founder, CMD, Madison



"There are no sports without consumers and fans. The central reason why Pro Kabaddi has succeeded is because it has been received well by the consumers."

Anupam Goswami, CEO, Sports Leagues, Disney Star and League Commissioner, Pro Kabaddi League



"What we did via broadcasting football to India was to change the way Indian athletes, boys and girls saw themselves."

John Dykes, Broadcaster & Content Strategist



"The Malware Tracking Study shows that educating consumers about the risks involved in visiting piracy sites or apps could reduce malware infections by 31%."

Matthew Cheetham, General Manager, Coalition Against Piracy, Asian Video Industry Association (AVIA)



"Gaming has been a very under represented industry so far in India. India has the right kind of talent to scale. Gaming alone will be the largest stakeholders put together. The day is not far when India shall become the skill capital."

Manvendra Shukul, CEO, Lakshya Digital



"The content from South India is more ground rooted to reality and is a reflection of what is happening in the society. The thought process and meticulous approach is something to be appreciated and aspired for."

Sanjay Wadhwa, Founder,
AP International



"Times in the M&E have changed and those who are refusing to adapt to the change will keep retreating. We have to rethink content creation at all fronts - from the writing, editing, the music, and the stories that we want to tell."

Bobby Bedi, Founder,
Content Flow Studios



"India has come a long way and the success of streaming in India is exemplary. This is not just about mechanical or arithmetic reach of distribution. It is also the very high-quality reach of our content. It's been a phenomenal ride so far and we cannot wait for it to get better from here."

Vikram Malhotra, Founder & CEO,
Abundantia Entertainment



"As content further evolves, we will have far reaching audiences and this would also help the industry in reaching the expected vision."

Senthil Kumar, Co-Founder,
Real Image



"We are at an exciting space in the AVGC sector. The Indian content is getting accepted at global stage, particularly the animated content. We foresee a lot of constructive steps being taken to further boost the sector."

Munjal Shroff, Director & COO,
Graphiti Multimedia Pvt Ltd.



"The customer today in terms of OTT has abundant choices available and a low cost of forum shifting. The Indian consumer is consuming around 18.4 GB of data every month."

Rahul Vatts,
Chief Regulatory Officer, Airtel



"The future we are seeing is a multilingual future. The increasing footprints of platforms in regional languages is providing multitude opportunities to storytellers and creators. Everything that we are creating is with the aim to inspire India. We believe in the sacred power of storytellers. Our aim is to make people say 'wow' every time they watch content on Disney."

Gaurav Banerjee, Head, Content, Disney + Hotstar
& HSM Entertainment Network



"The technology space is changing, the medium itself has become the message. Today, those who are not delivering the live feed will not scale."

Avinash Pandey, CEO, ABP Network
& President, The News Broadcaster &
Digital Association (NBDA)



"With regards to the changing face of Indian cinema and world cinema overall, we have seen a paradigm shift. There are huge changes underway in audience behavior, the consumer approach, and content style."

Shibasish Sarkar, Chairman & CEO, IMAC-India and
President, Producers Guild of India



"Education broadens your horizon to understand people and things. Inner talent can be by birth, or genetic but to nourish that talent, you need to skill yourself and learn the art. You can be told about the art but what you need to learn is from experiences. Education today needs more wisdom than knowledge, wisdom that comes from tried and tested experiences of people over thousands of years."

Subhash Ghai, Indian Film Director,
Producer and Screenwriter



"India has been in the limelight. We have seen the strategic importance of India, by looking at the statistics in overall Asia. Video market stood at USD 70 billion with India having 16% of the market share.

Mihir Shah, Vice President,
Media Partners Asia



"Today, technology has taken over in such a big way that it feels like a different kind of business but it's not. Storytelling is still at the root of everything. Performances are still fabulous when the right script is there with the right director."

Ramesh Shippy, Producer & Director,
Ramesh Sippy Entertainment



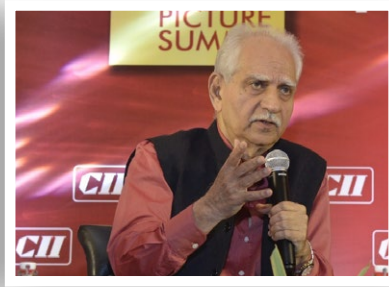
"The industry is trying to re-set itself. We will see all the potential outcomes in a year and we all should focus on making good content."

Aashish Singh, Chief Executive
Officer, Lyca Productions



GLIMPSES OF THE BIG PICTURE SUMMIT 2022







Confederation of Indian Industry

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11-12 October 2023

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Javed.ahmad@cii.in | Neetu.sikka@cii.in



Confederation of Indian Industry

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

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

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

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

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

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

Confederation of Indian Industry

The Mantosh Sondhi Centre

23, Institutional Area, Lodi Road, New Delhi- 110 003 (India)

T: 91 11 45771000 / 24629994-7

E: info@cii.in • W: www.cii.in

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