



Confederation of Indian Industry
125 Years - Since 1895

Wirtschaftliche Zusammenarbeit
Indien - Deutschland

**HANDEL UND
INVESTITIONEN**



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Einführung

Die rasche Ausbreitung der Covid-19-Pandemie auf der ganzen Welt im Jahr 2020 führte zu einer Gesundheitskrise, die zu einem beispiellosen Absturz der globalen Wirtschaftstätigkeit führte, dessen Auswirkungen in den nächsten Jahren zu spüren sein werden. Da sich die Krise in den meisten Ländern ausdehnt, ist davon auszugehen, dass sich die Wirtschaftsstrukturen, geopolitischen Beziehungen und Verflechtungen über einen bestimmten Zeitraum hinweg tiefgreifend verändern werden.

Da das Jahr 2020 voraussichtlich mit einer schweren Rezession enden wird, sind die meisten Volkswirtschaften dabei, die wirtschaftlichen Folgen zu bewältigen. Umfangreiche Konjunkturpakete wurden aufgelegt, um die Liquidität zu erhalten und die Nachfrage anzukurbeln. Bestehende Lieferketten, Importquellen und Exportziele sowie deren Stärken und Schwächen werden neu kalibriert, um Unterbrechungen der Wirtschaftstätigkeit zu minimieren. Auch die Unternehmen überdenken ihre strategischen Modelle und versuchen, ihre Investitionen und ihren Beschaffungsbedarf zu diversifizieren, um die Abhängigkeit zu verringern und Risiken zu streuen.

Im Rahmen dieses Szenarios haben indische und deutsche Unternehmen die Möglichkeit, die Stärken des jeweils anderen zu nutzen und neue Möglichkeiten für ein kommerzielles Engagement miteinander zu suchen.

Die deutsch-indische Partnerschaft hat seit Jahrzehnten an Umfang und Ambitionen zugenommen - die gegenseitige Anerkennung der Stärken und Fähigkeiten des jeweils anderen, die Komplementarität der wirtschaftlichen Beziehungen sowie die strategische Konvergenz der Weltanschauungen sind einige der Faktoren, die zu einer Annäherung der beiden Länder beigetragen haben. Deutsche Unternehmen sind bedeutende Akteure in der indischen Wirtschaft und haben langfristige Investitionen in einer Vielzahl von Sektoren getätigt, z.B. in den Bereichen Automobil und Transport, erneuerbare Energien, Verteidigung, intelligente Städte, nachhaltige Entwicklung usw.

Mit Indiens historischen Verbindungen zu Europa als solider Grundlage hat sich der Kontinent zu seinem wichtigsten Handelspartner entwickelt, und innerhalb dieses Kontinents ist Deutschland Indiens wichtigster Markt. Das beschleunigte Wirtschaftswachstum Indiens, die wachsende Mittelschicht, die reife Demokratie mit stabilen Institutionen und die etablierte Rechtsstaatlichkeit haben dazu beigetragen, engere Verbindungen zu Deutschland zu fördern. Gepaart mit einem sich verbessernden Geschäfts- und Investitionsklima haben diese Faktoren dazu beigetragen, deutsche Investitionen nach Indien zu holen.

Für indische Unternehmen ist Deutschland eine Quelle hochwertiger, zuverlässiger Maschinen und Ausrüstungen sowie von Flugzeug- und Autoteilen. In ähnlicher Weise verfügt Indien über eine große und diversifizierte Fertigungs- und Dienstleistungswirtschaft mit einer vielfältigen Produktion über die gesamte Lieferkette hinweg, von Rohstoffen über Zwischenprodukte bis hin zu Fertigerzeugnissen, sowie über Maschinenbauerzeugnisse, die bei der deutschen Industrie großen Anklang finden.

Die wachsende Technologie- und Innovationsfähigkeit Indiens zieht auch deutsche Unternehmen an. Ein enormes Potenzial wird in der Ausweitung von Partnerschaften zwischen Deutschlands innovativem Mittelstand und Indiens technologiebasierten Start-ups gesehen, da beide Länder versuchen, neue und aufstrebende Technologien der Industrie 4.0 zu stärken.

Eine weitere bedeutende Entwicklung, die stärkere Handels- und Investitionsbeziehungen zwischen Indien und Deutschland beschleunigen kann, ist die formelle Abspaltung des Vereinigten Königreichs von der Europäischen Union, d.h. Brexit. Das Vereinigte Königreich ist ein wichtiger Handelspartner für Indien, und ein großer Teil der indischen FDI in die EU ist in der Regel nach Großbritannien geflossen, um Zugang zum größeren europäischen Markt zu erhalten.

Während über die Umriss von Brexit verhandelt wird, ist Deutschland, das bisher ein bevorzugtes Ziel für indische FDI war, in einer guten Position, um sich als alternatives Ziel für indische FDI in Europa zu positionieren und einen ungehinderten Zugang zum gemeinsamen europäischen Markt zu bieten.

Dieser Bericht fasst den aktuellen Stand der deutsch-indischen Wirtschaftsbeziehungen zusammen und bietet eine detaillierte Analyse des zukünftigen Potenzials. CII hat eine einzigartige Formel entwickelt, um Exportartikel mit dem höchsten Potenzial für ein Partnerland zu identifizieren, abhängig vom Importprofil des Partnerlandes und den Exportkapazitäten Indiens. Mit diesem Instrument zählt der Bericht 68 Artikel auf der 6-stelligen HS-Ebene auf, die von deutschen Importeuren für ihre inländische Produktion am besten aus Indien bezogen werden können.

Auf der nächsten Stufe untersucht der Bericht im Detail die Liste der Güter, bei denen sich Indien effektiv in die deutsche Produktion integrieren kann, um sich an der globalen Wertschöpfungskette zu beteiligen und aus Deutschland weiter zu exportieren.

Auf der Grundlage von Geschäftsberatungen beider Seiten geht der Bericht weiter auf die Sektoren mit hohem Investitionspotenzial für deutsche Unternehmen in Indien ein. Er untersucht auch aufstrebende Zukunftsbereiche, in denen indische und deutsche Unternehmen zum gegenseitigen Nutzen gemeinsam kreieren und produzieren können.

Schließlich skizziert der Bericht die indischen Bundesstaaten, in denen deutsche Unternehmen in Bezug auf die Beteiligungssektoren profitieren können. Das Investitionsklima und die Anreize, die diese ausgewählten Bundesstaaten bieten, sind in dem Bericht tabellarisch dargestellt.

CII bietet indischen Unternehmen, die nach Deutschland exportieren möchten, durch seine zahlreichen Büros im ganzen Land und seinen länderspezifischen Schreibtisch sowie durch maßgeschneiderte Market Facilitation Services umfassende Unterstützung. Darüber hinaus bietet sie deutschen Unternehmen branchen- und staatenübergreifend Unterstützung bei der Ansiedlung in Indien.

Mit diesem detaillierten und weitreichenden Bericht möchte CII zur weiteren Entwicklung der robusten Wirtschaftspartnerschaft zwischen Indien und Deutschland beitragen. Mit seinem intensiven Engagement für Deutschland, einschließlich seiner Repräsentanz in Frankfurt, will es als Brücke zwischen der deutschen und der indischen Industrie fungieren, um die Geschäftsmöglichkeiten zwischen beiden Seiten auszubauen.

Strategischer bilateraler Kontext

Indien gehörte zu den ersten Ländern, die mit der Bundesrepublik Deutschland diplomatische Beziehungen aufnahmen. Die deutsch-indischen Beziehungen sind stark und wurden auf der Grundlage gemeinsamer Anliegen hinsichtlich der globalen und regionalen Sicherheitsarchitektur, gemeinsamer strategischer Imperative und einer für beide Seiten vorteilhaften Wirtschafts- und Handelsagenda aufgebaut.

Indien und Deutschland haben eine gemeinsame strategische Weltsicht, die die Stärkung internationaler Institutionen und die Förderung der multilateralen globalen geopolitischen Landschaft einschließt.

Deutschland hat den Beitritt Indiens zu allen vier multilateralen Exportkontrollregimen - der Gruppe der Kernmaterial-Lieferländer (NSG), dem Trägertechnologie-Kontrollregime (MTCR), dem Wassenaar-Arrangement (WA) und der Australischen Gruppe (AG) - unterstützt. Von diesen steht jetzt nur noch die Mitgliedschaft in der NSG aus, und die deutsche Unterstützung wird für die Mitgliedschaft Indiens weiterhin von entscheidender Bedeutung sein.

Indien und Deutschland haben sich für eine umfassende Reform des UN-Sicherheitsrates eingesetzt, wobei Deutschland Indiens Bewerbung um einen ständigen Sitz nachdrücklich unterstützt hat. Beide Länder haben auch Synergien in Bereichen wie der Bekämpfung des internationalen Terrorismus, der Gewährleistung der Freiheit der Schifffahrt und der maritimen Sicherheit, der regionalen Sicherheitsarchitektur und so weiter entwickelt.

Im Rahmen der bilateralen Beziehungen unterstützte Deutschland Indien bei seiner Entwicklungsagenda, indem es sich an Exzellenzinstituten und am ersten integrierten Stahlwerk Indiens in Rourkela beteiligte. In jüngster Zeit intensivierten die beiden Länder ihre Beziehungen durch die Unterzeichnung einer "Strategischen Partnerschaft" im Jahr 2001. Diese wurde durch die Einrichtung zwischenstaatlicher Konsultationen (IGC) im Jahr 2011 auf der Ebene der Regierungschefs ergänzt. Das Format der Regierungskonferenz, die alle zwei Jahre stattfindet, hat einen soliden Dialog und eine umfassende periodische Überprüfung der Zusammenarbeit zwischen den beiden Ländern ermöglicht. Das Gipfeltreffen der Regierungskonferenz erleichtert es auch, neue Bereiche des Engagements abzustecken.

Am 30. Mai 2017 fand in Berlin die 4. Regierungskonferenz statt, auf der 12 bilaterale Kooperationsdokumente in verschiedenen Sektoren unterzeichnet wurden. Auf der fünften Regierungskonferenz, die im November 2019 in Neu-Delhi stattfand, haben die beiden Länder ihre Beziehungen mit 21 Abkommen auf eine breite Basis gestellt, unter anderem in den Bereichen Eisenbahnzusammenarbeit, grüne Mobilität, künstliche Intelligenz und Zivilluftfahrt.

Die Ausweitung der bilateralen Beziehungen hat im Laufe der Zeit auch zur Einrichtung mehrerer Dialogmechanismen geführt, darunter die Konsultationen im Auswärtigen Amt, die High Technology Partnership Group, der Hohe Verteidigungsausschuss, das Deutsch-Indische Energieforum und das Deutsch-Indische Umweltforum sowie gemeinsame Arbeitsgruppen in Bereichen wie Kompetenzentwicklung, Abfallwirtschaft, Wasser usw.

Die laufenden Mechanismen des bilateralen Dialogs wurden auch von regelmäßigen, hochrangigen Besuchen begleitet, die dazu beigetragen haben, die Agenda für die gegenseitige Zusammenarbeit zu bereichern. Der indische Premierminister besuchte Berlin am 20. April 2018 und erörterte eine Reihe von Themen wie Wirtschafts- und Handelsbeziehungen, Sicherheits- und strategische Fragen usw. Auch Bundespräsident Dr. Frank-Walter Steinmeier stattete Indien im März 2018 einen Staatsbesuch ab.

Der indische Premierminister besuchte Deutschland zweimal im Jahr 2017 zur 4. Regierungskonferenz im Mai 2017 und zur Teilnahme am G20-Gipfel im Juli. Der erste offizielle Besuch von Premierminister Modi in Deutschland fand im April 2015 statt, als Indien das Partnerland der Hannover Messe 2015 war. Die Initiative "Make in India" wurde auf der Veranstaltung bekannt gemacht und diskutiert. Bundeskanzlerin Angela Merkel besuchte Indien im Oktober 2015 und davor in den Jahren 2007 und 2011.

Die beiden Staats- und Regierungschefs führten auch telefonische Gespräche, um die Reaktion auf die Covid-19-Pandemie einschließlich gemeinsamer Herausforderungen zu erörtern.

Robustes Engagement und Aktivitäten rund um die expandierende Wirtschafts- und Handelspartnerschaft, die Verteidigungsbeziehungen, die Zusammenarbeit in Wissenschaft und Technologie, die berufliche Aus- und Weiterbildung und die nachhaltige Entwicklung tragen zur Untermauerung der deutsch-indischen strategischen Partnerschaft bei.

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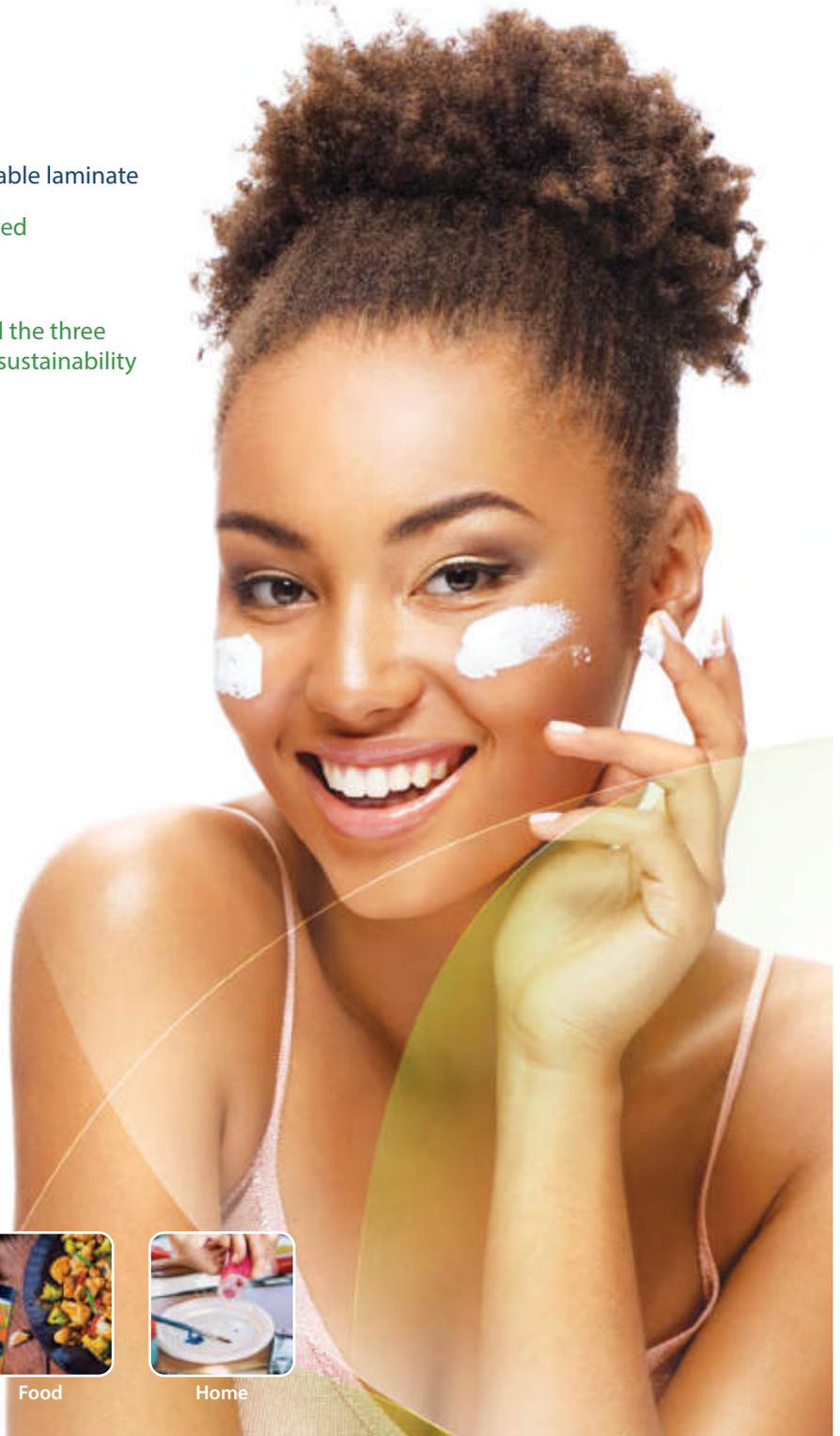
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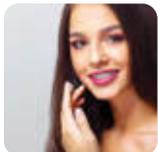
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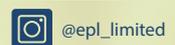
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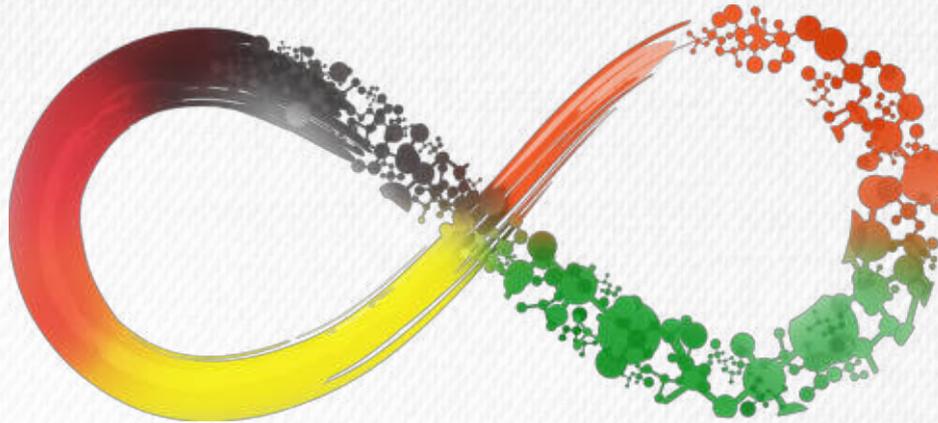
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Advantage Maharashtra: India's Leading Industrialised State

Infrastructure & Connectivity

- 30+ Mega Projects under development
- 10% of India's Geographical Area-308k sq.kms
- Robust connectivity: Ports, Railways, Airports and Roads
- 24X7 Power
- Sectoral Industrial Parks & Zones

Ease of Doing Business

- Maha Parwana (Accelerated Permission) within 48 hours
- Online Single Window System for applications
- Progressive reforms across land, labor, electricity, environment etc.
- Stable and supportive political environment

Favourable Demographics

- Maha Jobs, an industrial employment portal
- One of the largest talent pools in India which enrolls more than 1.6 Mn students a year
- 45 Million people to be trained with employable skills by 2022
- Large Consumer Base with 45.2 per cent Urban Population

#1 FDI destination in India

- Vision to become India's first Trillion dollar sub- national entity
- Strategically located & contributes to ~15% to India's GDP, on average
- Accounts for more than 30% of the cumulative FDI in India
- 22% of Total Exports
- Priority land allotment for FDI Investors

Progressive Policy & robust incentives

- Progressive Industrial Policy launched in April 2019
- 14 Thrust Sectors
- Separate Policy for Electric Vehicle and Aerospace & Defence
- Only state in India to offer SGST rebate on Gross Basis
- Maharashtra is the only state in India which has disbursed more than USD 600 million + in lieu of various incentives during the year 2018-19

Operational Support

- MIDC is the Nodal Agency for end to end investor support
- MIDC is Special Planning authority to grant permissions for industries above 10 acres across Maharashtra

Investor Aftercare

- Investor First Programme, facilitating entire investment journey
- Dedicated investors facilitation and aftercare cell called MAITRI (Maharashtra Industry, Trade and Investment Facilitation Cell)

Magnetic Maharashtra 2.0: The Strategy

PLUG AND PLAY INFRASTRUCTURE

01

- Ready-to-Move Factory spaces with advanced utilities, affordable pricing structures to be made available with sectoral tailoring
- Infrastructure to include affordable rental sheds, comprehensive utilities, expat housing, modular spaces in a 100 per cent compliant ecosystem
- It will act as Industrial clusters in the future, hosting a diverse base of entrepreneurs, local suppliers and anchor units.
- 40,000 acres of land in key industrial areas have been made available for greenfield and brownfield investments

MAHA PARWANA (Accelerated Permissions)

02

- Addressing the most pressing concern for an FDI Investor in South East Asia, this intervention brings an end to the license and permission hassles of investing in the state
- A single window clearance system, providing companies with all the necessary permission within 48 hours
- The master permission will guarantee that all statutory permissions required to start operations will be granted within a prescribed schedule (from three to 30 days), or else it will be considered a deemed approval.

MAHA JOBS

03

- Dedicated industrial employment portal, launched in July 2020, aims to help new and potential investors employ the vast and skill rich local talent in Maharashtra
- Maha Jobs will help industries meet the talent shortfall that they have been facing in the recent months with ready access to unskilled, semi-skilled and skilled talent
- In parallel, it will allow youth of the state to list his/her talent on the portal across 17 sectors and 950+ job roles
- This matchmaking of talent will help the state achieve an optimal mix of utilization and boost manufacturing productivity

INVESTOR FIRST PROGRAMME

04

- In lieu of proposed investments, and the state's intent to reiterate its support to each of the investor, for closer handholding and keeping in mind it's role, as a Nodal Agency for Industries in the state.
- Relationship Manager (RM) and Relationship Executive (RE) have been assigned to all the companies investing above INR 50 crore.
- RMs & REs will be responsible for overall co-ordination and providing necessary support to the Investors on a continuous basis.

MIDC: Accelerating Maharashtra's Industrial Progress

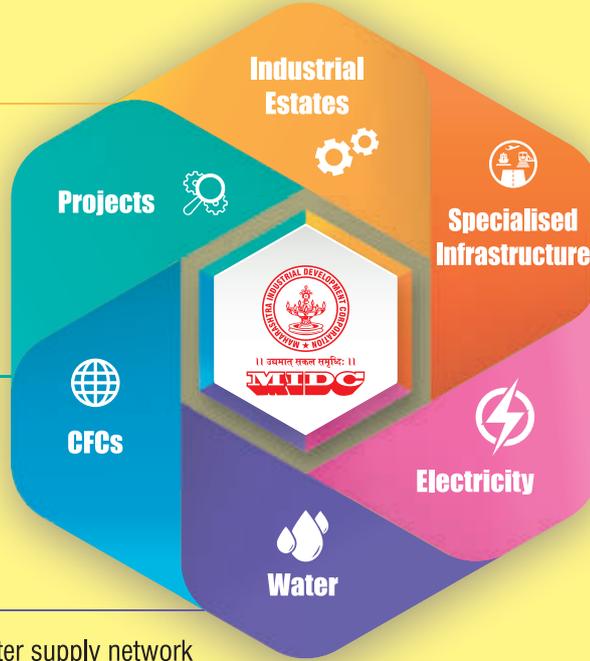
Maharashtra Industrial Development Corporation (MIDC) is the nodal Investment Promotion agency under the Government of Maharashtra. It provides businesses with infrastructure such as land, roads, water supply, drainage facilities and street lights etc.

- 289 Industrial complexes
- ~ 2.5 Lakh Acres of land

- Delhi Mumbai Industrial Corridor (DMIC)
- SUPA – Japanese Investment Zone

- 13 Chemical Zones
- 19 CETPs¹
- 2 STPs²
- 4 CHWTSDF³

- Asia's largest water supply network



- Wine Parks
- ESDM
- Datacentre
- Food Parks
- Textile parks
- 27 IT Parks, 9 SEZs

- Dedicated feeders for industries

1) Common Effluent Treatment Plants 2) Sewage Treatment Plants 3) Common Hazardous Waste Treatment, Storage & Disposal Facility

Key Activities

- Special Planning Authority
- Strong network of 16 Regional Offices
- Link between Govt. and Industry
- Acquisition and Disposal of Land
- Providing Infrastructure support
- One-stop for Investors Relations

Germany : Maharashtra's Growth Partner

Top Investment Destination Choice

- Maharashtra has traditionally been one of the top investment destinations for German companies in India

Key Areas of Investments

- German investments in key sectors include: Automobiles, Chemicals, Drugs & Pharmaceuticals, Electrical Equipment, Engineering, Metallurgical industries, Services sector, Trading and Transportation

Key Engagements of Government of Maharashtra with Germany

- Hannover Messe 2019
- Strategic Roundtable Discussion with German companies on a quarterly basis
- Interactive sessions with German Mission in India
- Longstanding relationship with Indo-German Chamber of Commerce

Major Germany based companies in Maharashtra



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With a **global leadership position** in caustic, advanced material, phosphates, sulphites, peroxides and viscose filament yarns, it is also India's leading producer of fluorides, agri-products and insulators.

Aditya Birla Chemicals speaks of over **1000 product lines** catering to more than **15 industries served** and having over **30 Well Reckoned Brands**.

Aditya Birla Chemicals strongly believes that the most responsible and sustainable businesses would also be financially most successful in the long run and is gradually moving towards stringent safety norms. Product stewardship is also a crucial element of the business. We are equally committed to create a positive impact on each of the communities in which it operates through key initiatives in health, education, social, sustainable livelihood and infrastructure development.



Aditya Birla Chemicals – Ties with Germany

Aditya Birla Chemicals has manufacturing in Germany and is associated with companies in Germany through joint ventures.

In 2019, CTP Advanced Materials GmbH (originally CTP Chemicals and Technologies for Polymers GmbH) became part of the Aditya Birla Chemicals – Advanced Materials (Aditya Birla Group) entirely. The company, operating since 1993, specializes in epoxy hardeners and modified epoxy resins and manufactures customized products to address various high functional requirements of Automotive, Coating, Construction, Composite and Electrical & Electronics Industries. The facility is located at Rüsselsheim (Germany) with an R&D and Application Development Center. It offers a wide range of products (> 200 customized products) to more than 350 customers under the brand name CeTePox.

Aditya Birla Chemicals is also engaged in a joint venture with Reinhausen Power Composites through Aditya Birla Insulators. The joint venture known as "Aditya Birla Power Composite Limited" (ABPCL) was formed in October 2019 and will be setting up a state-of-the-art CHCI (Composite Hollow Core Insulator) manufacturing plant at Halol, Gujarat, India. Reinhausen Power Composites (Unit of Maschinenfabrik Reinhausen GmbH - MR) is the 2nd largest Hollow Composite Insulator player globally.

Aditya Birla Chemicals is also associated with Evonik in a joint venture to produce hydrogen peroxide in Saraburi, Thailand. Evonik is one of the world's leading specialty chemicals companies, headquartered in Essen, Germany.

This is over and above a significant customer and vendor relationships we have in Germany across all our business.



From being an Indian Superbrand to an emerging Global Brand.

Embarking on a journey to conquer new and foreign territories, HIL's innovative, cutting-edge and eco-friendly business synergies, is well on its way to ace expansion and empower growth.

Since its establishment in 1946, HIL Limited has proven itself as a leader in the building materials industry. A flagship Company of \$2.4 Billion Conglomerate CK Birla Group, HIL Limited has a rich legacy of established brands which are future ready, high quality, have innovation at their core and stood the test of time. HIL has consistently anticipated the evolution of customer requirement while continually innovating its product offering in accordance.

Having pioneered in green technology, keeping in mind the paradigm shift to green building materials almost a decade ago, HIL diversified into vast range of products that are environmentally viable and conducive. HIL's portfolio includes **Charminar & Charminar Fortune** – a Superbrand, which has the highest market share amongst the fiber cement roofing sheets in India, **Birla Aerocon**, a Superbrand green building product line comprising of wet walling and dry walling solution range supplying Panels, Designer Boards, Tile adhesives, Blocks and Jointing Mortar, **Birla HIL** polymer solutions, which comprises of high quality pipes and fitting with the innovative True Fit™ Technology and Wallputty with TrueColor Technology. The latest addition to its portfolio include a wooden flooring brand from Germany - **Parador** that provides premium quality wooden flooring solutions and has a market presence in over 80 countries. The combined business of HIL and Parador makes HIL a stronger, intelligent, integrated and a globally recognized entity.

With an employee strength of **5500+** and **23 manufacturing facilities** in India and abroad, HIL is set to making new benchmarks in the building materials segment and expand into newer territories.

HIL is certified as **Great Place to Work** by **Great Place to Work® Institute** for the second time in a row and is featured as **"India's Best Companies to Work For - 2020"** ranking **67th**. HIL is also **Top 30 Best Manufacturing companies to Work in India - 2020** and **Best in Cement and Building Materials in India - 2020** as certified by **Great Place to Work Institute**. It's MD and CEO, Mr. Dhirup Roy Choudhary has been awarded as **"The Most Promising Business Leader of Asia 2018 & 2019"** by the **Economic Times** and the company has also has been a recipient to the Iconic Brand Award, Asia's Most Trusted Company Award, Best Company of the Year, Employer brand Award and has been maintaining the Superbrand status for many years now.

Having a rich legacy of 70+ years, HIL owns the responsibility to give back to the society it operates in. HIL aims to minimize the impact of its operations and strive towards improvement and upliftment of communities through its multiple initiatives. Their community programs are aimed to improve access to education, healthcare and sanitation.

PARADOR

living performance

For the most beautiful home in the world

Since its foundation in 1977, Parador GmbH has developed into a leading manufacturer of high-quality systems for floor, wall and ceiling design. The product range of the brand includes laminate and engineered wood floorings, panels as well as resilient floor coverings, which are manufactured at the German headquarters in Coesfeld and the Austrian site in Güssing. 550 employees in administration and production ensure that Parador products are available in over 80 markets worldwide. The export quota of the Münsterland-based premium manufacturer is over 50 percent. In recent years, the company has been able to successfully increase its sales annually and, with 160 million sales in 2019/2020, celebrated the most successful business year since the company was founded.

Since July 2018, HIL Limited, a subsidiary of the CK Birla Group, has been a shareholder of Parador. This partnership and the resulting synergy effects have enabled Parador to continue investing and expanding and to exploit its entrepreneurial growth potential in the long term.

By entering the Indian market in autumn 2019, Parador has opened up another strategically important potential market. A ten-person sales team and an experienced marketing team at HIL open up the market nationwide and are in close consultation with their German colleagues. The sales orientation focuses on both retail partners in the Indian metropolises as well as commercial construction projects with architects and building owners. For this, Parador has developed its own collection, which is specifically geared to the needs of the Indian market. The first successfully implemented major projects already show that the quality and design of the products "made in Germany" also inspire Indian customers.

Guarantors of Parador's worldwide success are the highest standards of technology, materials and production. Impulse-giving developments from architecture and home design, the feeling for trends, suggestions from lifestyle, craftsmanship and art inspire the product developers and designers at Parador time and again to create new concepts. The maxim applies here: Parador is genuine, innovative and sophisticated. For its outstanding product design, Parador has been awarded several international prizes; including the red dot design award, the Interior Innovation Award and the German Design Award.

As a traditional woodworking company, Parador is committed to the responsible use of natural resources and sets ecological standards for materials, production, packaging and logistics. Since 2011, Parador has also been a partner of the "Plant-for-the-Planet" foundation, which promotes reforestation and climate justice worldwide.



ESSEL PROPACK: FROM CONCEPT TO TUBE, THE PERFECT HOME FOR YOUR PRODUCT

ESSEL Germany plays an essential role in the global success of EsSEL Propack Limited in India

Tubes are an integral element of our lives! We use them for toothpaste, face care or shower gel. Tubes are now even used for sweets. The products are just as diverse as their brand names. And yet a large proportion of the tubes come from ESSEL's production facilities!

EsSEL Propack, is the largest specialty packaging global company, manufacturing laminated plastic tubes catering to the FMCG and pharma space. Employing over 3269 people representing 25 different nationalities, EsSEL Propack functions through 19 state of the art facilities in eleven countries, selling about 8 billion tubes and continuing to grow every year. Since 2019, EsSEL has been part of Blackstone, one of the leading investment companies managing global assets of \$512 billion. Blackstone has strong expertise in the packaging sector.

Holding oral care market share of 36% in volume terms globally, EsSEL Propack is the world's largest manufacturer with units operating across countries such as USA, Mexico, Colombia, Poland, Germany, Egypt, Russia, China, Philippines and India. These facilities cater to diverse categories that include brands in beauty & cosmetics, pharma & health, food, oral and home, offering customized solutions through continuously pioneering first-in-class innovations in materials, technology and processes.

THE TRADITION OF TUBE PRODUCTION IS ROOTED IN DRESDEN

A brief history of the tube: This practically ingenious form of packaging was patented in the USA by John Goffe Rand in 1841. A little later, tube production also began in Dresden. From here, it conquered the European market.

In 1907, the Dresden pharmacist Heinsius von Mayenburg



started the process with the invention of his toothpaste, 'Chlorodont'.

He had it filled in tubes of tin and thus started the success story of the tube in 1917. The production facility survived the war and was nationalized in 1952 as 'VEB Elbe-Chemie' in East Germany. After 1990, it was reprivatized to become 'Dental-Kosmetik Dresden GmbH & Co. KG'. The new owners set their focus on the further development of the toothpaste and looked for a reliable partner for their packaging. They found one in India.

ESSEL DEUTSCHLAND GMBH & CO. KG

1999 marked the year in which the first German-Indian joint venture of the ESSEL Propack group was founded in the new federal states of Germany - EsSEL Deutschland GmbH & Co. KG was formed. The Dresden-based company with 185 employees is currently the European market leader for high-quality decorated laminate tubes. At the company's facility in Dresden alone, ESSEL Deutschland GmbH & Co. KG produces well over 1 million laminate tubes in various diameters for the food, cosmetics, toothpaste, pharmaceutical and household sectors.

In contrast to tubes made of aluminum or polyethylene, the laminate tube enables various printing processes such as flexo printing, letterpress printing and digital printing, as well as additional refinements (e.g. embossing). For EsSEL's customers, these are of vital importance, as the value of the tube is now determined by printing and sustainable solutions. The group has now invested an excess of 30 million euros in its German plant as it is continuously focusing on new tube lines and high-quality printing technology. Continuing the leadership path, ESSEL Deutschland has recently won the prestigious 'Tube of the Year' award from the European industry association ETMA (European Tube Manufacturers Association) for leading innovation in the field of sustainability.



ESSEL PROPACK LEADING INNOVATION WITH RECYCLABLE TUBE PACKAGING

Platina lami tubes herald much needed eco-friendliness in the segment with first of its kind break through innovation.

Essel Propack's Platina tubes have been recognized by RecyClass, Europe and Association of Plastic Recyclers (APR), USA as meeting or exceeding the strict European and American HDPE recycling standards respectively. This achievement is a major step forward in delivering on Essel's sustainability commitments.

This is a first of its kind breakthrough in the tube packaging market, essentially for brands looking to convert to sustainable barrier packaging formats which are recyclable.

The R&D team based out of Essel's focused innovation facility in Maharashtra, India has developed sustainable tubes without compromising any of the functional features of the tubes like feel, shelf life, safety and machinability requirements for the various generations of production lines.

After use, the Platina tubes can be recycled in the dominant #2 plastic stream used across the globe for recycling milk cans, Juice bottles etc. Use of HDPE in

Platina tubes increases the stiffness of the tubes, enabling down gauging / reducing polymer content and in helping users to deliver on their sustainability commitments.

Sudhanshu Vats, Managing Director & CEO of Essel Propack Ltd., confirmed:

“ This innovation comes at a point where consumer product marketers are looking for sustainability solutions to meet their stakeholder commitments on Reducing, Recycling and Reusing (3 R's) their packaging. Essel as a responsible tube supplier to Global Consumer Brands is proactively offering this innovation to their Partners not only to enable them to achieve their sustainability targets, but also to fulfil their responsibility towards the society. ”



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SAP: The World's Largest Provider of Enterprise Application Software

SAP's strategy is to help every business run as an intelligent enterprise. As the market leader in enterprise application software, we help companies of all sizes and in all industries run at their best: 77% of the world's transaction revenue touches an SAP® system. Our machine learning, Internet of Things (IoT), and advanced analytics technologies help turn customers' businesses into intelligent enterprises. SAP helps give people and organizations deep business insight and fosters collaboration that helps them stay ahead of their competition. We simplify technology for companies so they can consume our software the way they want – without disruption. Our end-to-end suite of applications and services enables business and public customers across 25 industries globally to operate profitably, adapt continuously, and make a difference. With a global network of customers, partners, employees, and thought leaders, SAP helps the world run better and improve people's lives. SAP is headquartered in Walldorf, Germany.

SAP in India was established as a subsidiary in 1996 and is the 2nd largest subsidiary and the largest growing company within SAP worldwide with more than **13,340 employees** and presence in 8 cities- Bengaluru, Delhi/ Gurgaon, Kolkata, Mumbai, Chennai, Pune, Dehradun & Hyderabad. India has the second largest R&D centre for SAP. SAP India has ranked **1st in India's Best Companies to Work** for the second year in a row in 2019 and previously in 2018 by Great Place to Work Institute. SAP is also the **first multinational technology company** to be awarded the **Economic Dividends for Gender Equality (EDGE)** certification for 13 countries including India.



“ SAP's focus on supporting India's growth potential remains a top priority. We are privileged to be collaborating alongside our customers, partners, employees and government to support the USD 5 trillion economy vision of the nation. With more than 12,500 Indian organizations leveraging SAP to run their digital transformation, we are excited to continue playing an active role in supporting this immensely crucial milestone for Indian companies. ”

– **Scott Russel**, President, SAP Asia Pacific and Japan

Our Commitment



SAP is committed to supporting every customer to become a best-run business. We help the world run better and improve people's lives. We engineer solutions to fuel innovation, foster equality, and spread opportunity across borders and cultures.



Best-run businesses are intelligent enterprises – breaking down silos and adopting intelligent, dynamic, cross-functional business processes to deliver optimal experiences. Our strategy is to be “the Experience Company powered by the Intelligent Enterprise

Customer Success

In India, SAP serves 07 out of Top 10 ET 500 companies, 06 out of 07 Indian companies on Fortune Global 500 and above all 06 out of 10 “Maharatna” companies. SAP offers applications and services to enable more than 26 industries and is a technology partner of choice for **11,307 customers** across the Indian Subcontinent that includes **9,205 SMEs** with its vast network of 600 partners. SAP is committed to contribute towards digital transformation & productivity across industries and core government sectors

Making an Impact: UP-skilling, Digital Transformation, Education and Innovation

India has a high democratic advantage of 800+ million people in the age group of 18-36 but largely the employable workforce is largely unskilled. SAP has launched initiatives towards making a difference by contributing to the development of youth, community and industry by way of skill development under its **#GrowWithSAP** program. These programs by SAP supports the Indian Government's vision of **Digital India, Skill India, Make in India, Atmanirbhar Bharat**.

Our Purpose and Promise!

SAP India's **Code Unnati**, a coveted Golden Peacock Award winning corporate to citizen, digital literacy and IT skills development initiative is aimed at fostering digital inclusion in India. Launched in June 2017, Code Unnati integrates the Digital Literacy curriculum within primary to higher secondary curriculum and imparts skills in next-gen technologies among the youth enabling employment opportunities.

Code Unnati has digitally educated **1.8 million citizens** and trained **5,200 teachers** across **1500 centers**. Along with Code Unnati, project Nanhi Kali is committed to provide quality education and digital access to over 11,000 underprivileged girl children.

SAP Programs with Government: Make a Difference

SAP is working with the Ministry of Micro, Small and Medium Enterprises, NITI Aayog, Ministry of Skill Development and Entrepreneurship and National Small Industries Corporation on youth skilling and employability.

On the Education stream, SAP in India is currently supporting 34 Universities and educational institutions under its University Alliance program and have certified more than 5000 students during 2019-20. There is a major focus on training the youths on future skills, participating in Industry-Academia-Technology collaborations to support skilling, re-skilling & upskilling and supporting innovation & research.

Empowering Indian MSMEs – GLOBAL BHARAT PROGRAM

SAP India recently launched Global Bharat, a program designed to enable Indian MSMEs become globally competitive by equipping them with digital technologies. The program compliments the Government of India's vision to empower MSME sector by providing them access to global marketplace, digital skilling for the workforce and transforming business processes.



“ A diversified nation, an entrepreneurial powerhouse, with the youngest and still-working population, makes India a promising and high potential growth economy. With digitalization at its core, SAP's intent and initiatives are aligned towards India's vision of achieving an inclusive, resilient and sustainable development. SAP is committed to empower Indian businesses to embrace digitalization faster and focus on upskilling the workforce to become future-ready. ”

– **Kulmeet Bawa**, President and Managing Director, SAP Indian Subcontinent

Given the current business environment and state of economies, Global Bharat will enable Indian MSMEs to become future-ready while driving greater efficiencies by adopting these 3 initiatives:



Gaining Access to Global Marketplace: MSMEs will have open access to SAP Ariba Discovery where any buyer can post sourcing needs and any of the four million suppliers on Ariba Network can respond with their ability to deliver the goods and services required with no fees through December 31, 2020. Ariba Network is the largest digital B2B marketplace where more than USD \$3.3 trillion in global commerce flows annually. By accessing the SAP Ariba Discovery offer, Indian MSMEs can enroll themselves as suppliers and access a global customer market



Digitally Skilling Workforce: Business owners will have access to SAP India's Code Unnati curriculum providing 240 courses (more getting added in a few months) on Digital Financial, Soft Skills, Productivity Technologies that will digitally skill the workforce and adapt to the new working environments. The curated courses will be made available through a mobile application for people to access via their android smartphone devices. SAP India has already trained over 1.8 million youth with the help of 1500 physical training centers



Digitally Transform Businesses: Global Bharat brings affordable and accessible enterprise technology for MSMEs. Through Bharat ERP initiative, they can now adopt SAP's world class ERP; Business One Starter Pack on the cloud. This Digital transformation will enhance efficiencies for businesses while enabling them to provide better products and services to their customers.

CYIENT

DESIGNING TOMORROW TOGETHER

Cyient is proud of its deep professional bonds with Germany. Over the past 20 years, we have been working with customers to design the future of their industries, collaborating with communities and nurturing relationships beyond business. Based out of Stuttgart, we collaborate with some of the most respected German brands in following sectors:



Rail



Aerospace



Semiconductor



Industrial



Manufacturing

Cyient's employs about 600 associates across its engineering centers in Europe, helping our customers design, manufacture and support worldclass products and services. We are also active members of various local associations, including AHK and VDB, and firmly embedded in the local ecosystem in Germany.

Cyient's Founder and Executive Chairman, BVR Mohan Reddy was the Honorary Consul of the Federal Republic of Germany for the States of Andhra Pradesh and Telangana, India between 2016 and 2020. He was actively involved in strengthening bilateral ties in the areas of industry, education, skill building, innovation and culture.

cyient.com

Follow us on @cyient





ICICI Bank – Partnering growth

ICICI Bank is a large private sector bank and leading financial conglomerate in India, offering a diversified portfolio of financial solutions to Retail, SME and corporate customers. At March 31, 2020, we had a network of 5,324 branches, 15,688 ATMs and other touchpoints. Globally, we are present in 15 countries, including India. We are at the forefront of leveraging technology for digital solutions. Our subsidiaries include India's leading insurance, asset management, private equity and securities brokerage companies.

The above credentials and dedicated teams present globally, position us uniquely to partner the growth objectives of multinational and Indian corporates.

Digital initiatives: We are pioneers in digital banking and among the most technologically advanced banks in India. Our digital initiatives include:

- **Digital leadership:** We have the most comprehensive internet and mobile banking platforms, offering over 300 services. Our versatile salary account offering enables individuals to transact freely.
- **e-Tendering Gateway:** We have developed a customised payment gateway for e-tendering across multiple states in India.
- **Supply chain:** We offer best-in-class paperless platforms with seamless SAP-integrated supply chain solutions, collections/ payments, and channel financing, enabling digital transactions with suppliers.
- **Trade online:** Our comprehensive digital platform, especially for trade transactions enable paperless issuance and processing of Trade products.
- **Blockchain:** We are India's first Blockchain powered bank, supporting more than 250 corporates through our platform for global trade finance.
- **Remittance:** We facilitate quick remittances at competitive rates in multiple currencies through our online channels.

ICICI Bank UK PLC (ICICI UK): Founded in 2003 and registered in London, UK, ICICI UK is a wholly owned subsidiary of ICICI Bank. It has seven branches and four business centers in the UK and one branch in Germany (ICICI Germany). **ICICI UK** and ICICI Germany offer corporate banking and trade products to Indian and Multinational corporates. On the Retail side, ICICI UK offers online banking, debit cards, remittances, and property backed lending, while ICICI Germany also offers deposit services. ICICI Germany is a member of the Einlagensicherungsfonds, (deposit insurance) and participant of SEPA and Target2 clearing, enabling quick payments within the Euro area.

Through our vast domestic reach, global presence, wide offerings, and robust digital solutions, we are partnering the growth objectives of our elite customers.

Institutionelle Partner Profile



The balance of power in our world is changing, and the Asia-Pacific region will play a leading role in this new world order, geopolitically and geoeconomically. The APA wants to – and will – shape this change together with its partners in the region and is committed to the convergence of the economies of Asia and Europe. We want to improve market access and expand trade and investment – also for Asian companies in Europe. The APA is building bridges between German companies doing business in Asia and politics in Germany as well as in our Asian partner countries.

The APA is a joint initiative and umbrella organization of leading business federations – the [Federation of German Industries \(BDI\)](#), the [Association of German Chambers of Commerce and Industry \(DIHK\)](#), the [German Asia-Pacific Business Association \(OAV\)](#), the [Federation of German Wholesale, Foreign Trade and Services \(BGA\)](#) and the [Association of German Banks \(Bankenverband\)](#). The APA pools the economic concerns of German businesses active in the Asia-Pacific region and is an agenda-setter for crucial economic issues regarding the future of our cooperation with the Asia-Pacific region. The APA supports high-level economic talks during visits of Asian government representatives to Germany and during visits of the German Federal Government to Asia. One of the main events is the bi-annual [Asia-Pacific Conference of German Business](#), co-organized with the [German Chambers of Commerce Abroad](#) and the [Federal Ministry for Economic Affairs and Energy](#).

Joe Kaeser, President & Chief Executive Officer of Siemens AG, assumed the chairmanship of the APA in February 2019. The Chairman is advised and supported by the [APA Board](#).



The BDI conveys the interests of German industry to the political decisionmakers and in the process it provides support for business enterprises engaged in global competition. The BDI has at its disposal a widely branching network in Germany and Europe, in all important markets and in international organizations. The BDI takes care of the political flanking of international market opening. And it offers information and economic policy consultations for all topics related to industry.

Our mandate

We are the voice of German industry

The BDI is the umbrella organization of German industry and industry-related services. It speaks for 40 trade associations and more than 100,000 enterprises with around 8 million employees. Membership is voluntary. 15 organizations in the regional states represent the interests of industry at the regional level.

We take an active part in the democratic process

Pluralistic democracy functions only when diverse opinions in civil society are articulated in the will-finding and decision-finding process. It is only in the competition for ideas that the best solutions are found for our communal life. That is why the BDI is an indispensable actor in civil life – and an important force for reform in social policy. Industry and industry-related services see themselves as part of society and wish to play their part in shaping the necessary discussions on social policy.

We are intermediaries between industry and society

The BDI represents the interests of very varied branches of industry and industry-related services vis-à-vis NGOs, civil society and academic institutions. In explaining how business works, the BDI highlights the impact economic policy has on society. Our guiding principle is: the BDI serves industry – and industry serves people.



The members of our association are united by the conviction that politics and economy are based on the commitment of every single individual. In the Federal Association for Economic Development and Foreign Trade (BWA), experts and management of economy, scientific and public life face up to a collective responsibility: Beyond all particularist interests they step in for an eco-social market economy that creates sustainable growth for everybody and helps to maintain our world for the generations to come.

Economy means all of us!

Progress and wealth do not come by chance but they are based on the courage, creativity and dedication of many people in this country. Economy means all of us! For the purpose of this motto the BWA attempts to strengthen motivation, commitment and the sense of responsibility in our society.

Our competence – your advantage!

The BWA arranges valuable contacts on all levels: nationwide in the federal Senate, the regional branches and numerous local Trade Clubs. On the international level members of the BWA have exclusive contact to a widespread network of external trade advisors and over 100 Trade Points world wide.



Diplomatic Council

The Global Think Tank



The Diplomatic Council is a unique organization with consultative status to the United Nations combining a global think tank, a world-leading business network and a charitable foundation. Diplomatic Council members gain access to a global network of leaders from the highest levels of diplomacy, business and social change. The Diplomatic Council links diplomacy, business leaders, science's leading minds and society's front-runners on resolving mankind's biggest challenges.

GLOBAL THINK TANK

The Diplomatic Council functions as a global think tank with the world's leading minds and subject matter experts across cross-functional subjects. The Diplomatic Council has been granted by the United Nations the highest status that can be achieved for a non-governmental organisation): the special consultative status with the UN Economic and Social Council (ECOSOC) This status entitles Diplomatic Council members to attend UN sessions and make written and oral statements at international UN conferences and events. The Diplomatic Council, in partnership with other organizations, has spearheaded numerous key initiatives and projects around the world.

GLOBAL BUSINESS NETWORK

The Diplomatic Council is an elite global business network that builds the bridge between business leaders and the areas they can serve. The Diplomatic Council firmly believes that a thriving economy bringing prosperity to mankind is one of the best guarantors of peace. Based on this perception, the Diplomatic Council has translated its goal of promoting international understanding into an economic mandate. Against this background, the Diplomatic Council is a global business network providing a platform for diplomats, business leaders and societal personalities to meet and enrich each other.

SOCIAL GOOD

The Diplomatic Council Foundation supports social good around the world. The Foundation is committed to the promotion of peace and security for every life, and sustainable development.

The Diplomatic Council sparks inspiration and ignites world-changing collaborations.

The Diplomatic Council's mission is to be a catalyst for unprecedented human unity, progress, and fulfillment. It raises its voice for humanity, good sense and wisdom. Most importantly it believes economic diplomacy provides a solid foundation for international understanding. The membership unites established leaders and elevates the world through entrepreneurship, social impact, and policy as Diplomacy helps business and vice versa. The global business network is organized across all major industries and divided in sectoral forums, programs, initiatives and missions.

The Diplomatic Council is driven by active members from diplomacy, economy and society who are honored and committed to help develop mutually beneficial business relationships, encourage intercultural relations, enhance international understanding and promote more peaceful relations amongst nations. In a world that demands the intersection of economic competency, social entrepreneurship, and diplomatic skills, a think tank uniting diplomacy and business is crucial.

Further Information: www.diplomatic-council.org/application, info@diplomatic-council.org



The Network of German Business for the Asia-Pacific region



Based in Germany we provide our member companies
with any support they need for a successful business in Asia:

**Exchange of experiences
Know-How
Contacts**

OAV - Bleichenbrücke 9, D-20354 Hamburg
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visit our website at www.oav.de



The Economic Council (Wirtschaftsrat der CDU e. V.) is an entirely independent German business association representing the interests of more than 12,500 small and medium sized companies, as well as larger multinational companies. We provide our members with a platform to engage in a continuous dialogue with leading decision makers, both in Germany and Europe.

The Economic Council has representative offices in all Federal States as well as in Brussels and New York. The most important bodies in that context are the Federal Expert Commissions. Expert commissions are chaired by board members, chairmen and chief executives of some of the most renowned companies in Germany. The structure of our members is composed of companies from all sectors of the business and entrepreneurial community. The typical work of an expert commission comprises the engagement with high level policy makers from the respective policy area (facilitating a two-way dialogue between our members and key decision makers), consulting leading academics in the field and on this basis formulating concrete policy recommendations, which best reflect the interests of our entire membership base.



Confederation of Indian Industry
125 Years - Since 1895

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 working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry.

For 125 years, CII has been working on shaping India's development journey and, this year, more than ever before, it will continue to proactively transform Indian industry's engagement in national development. The premier business association has more than 9100 members, from the private as well as public sectors, and an indirect membership of over 300,000 enterprises from around 288 national and regional sectoral industry bodies.

With 68 offices, including 9 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 394 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.



Confederation of Indian Industry
RESEARCH
125 Years - Since 1895

CII Research is an Industry think-tank providing thought leadership on strategic economic and industry issues critical to national growth and development. Drawing on a deep reservoir of industry leaders and industry associations spanning all sectors and present across the country, CII Research originates analytical reports in consultation with stakeholders. Based on strategic perceptions and data, these in-depth insights suggest specific policies and action plans that would enhance the role of Indian industry in nation-building.

Confederation of Indian Industry

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