



ANDHRA PRADESH
India's Sunrise State



DEPARTMENT FOR PROMOTION OF INDUSTRY AND INTERNAL TRADE
MINISTRY OF COMMERCE & INDUSTRY
GOVERNMENT OF INDIA



Confederation of Indian Industry



30th **CII**
PARTNERSHIP
SUMMIT 2025®

Technology, Trust and Trade
Navigating the New Geoeconomic Order

14 - 15 November 2025
Visakhapatnam, Andhra Pradesh

Retrospect





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30 years of Partnership Summit

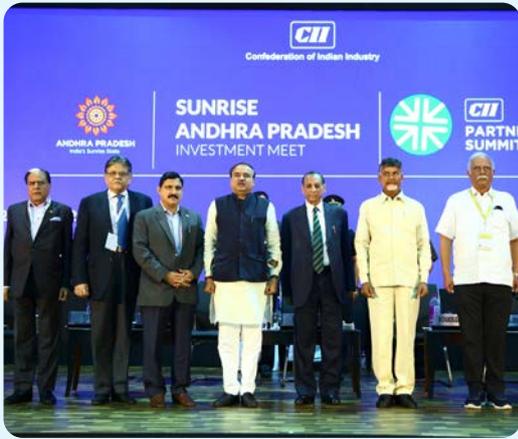
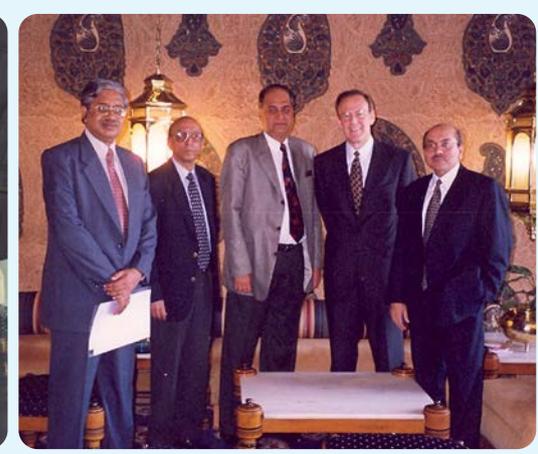
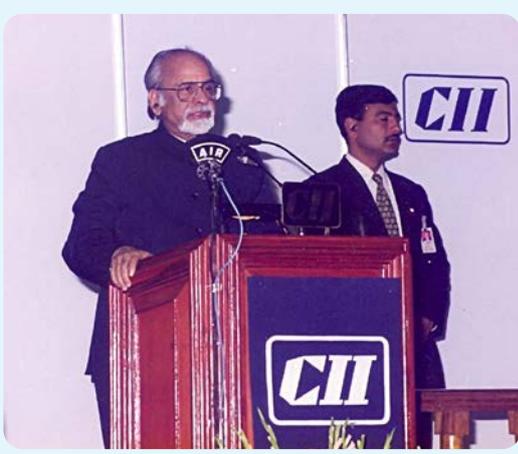
8 Years in
Andhra Pradesh



ANDHRA PRADESH
India's Sunrise State









The 30th edition of the CII Partnership Summit, organised by the Confederation of Indian Industry (CII) in collaboration with the Government of Andhra Pradesh and the Ministry of Commerce and Industry, was held on 14 and 15 November 2025 in Visakhapatnam, Andhra Pradesh. Themed “Technology, Trust and Trade: Navigating the New Geoeconomic Order,” this milestone event reaffirmed India’s growing influence in shaping global economic discourse.



Over two dynamic days, the Summit hosted 46 sessions, facilitated 1500+ B2B meetings, and welcomed over 3000 delegates, including 600 international participants from 62 countries. Discussions were held across seven key themes: trade, the future of industrialisation, sustainability and climate action, technology and innovation, growth, the geoeconomic framework, and inclusion. The presence of 20 overseas ministers, global CEOs, policymakers, and thought leaders underscored the Summit’s stature as a premier platform for international dialogue. Several MoUs were signed, strategic reports launched, and investment commitments worth Rs 11 lakh crore (USD 132.5 billion) were announced for Andhra Pradesh, signaling a transformative moment for the state and the nation. Since its inception three decades ago, the Partnership Summit has evolved into

one of the world’s most respected forums for fostering collaboration among Heads of State, multilateral institutions, and industry leaders. This 30th edition came at a time of profound global shifts, marked by technological disruption, supply chain realignments, and geopolitical uncertainties. Against this backdrop, the Summit provided a timely platform to deliberate on strategies for inclusive growth, resilience, and sustainability.

The Inaugural Session was graced by Hon’ble Vice President of India, Mr C P Radhakrishnan, who emphasised India’s pivotal role in ensuring global peace and stability. His address set the tone for discussions on how India’s economic trajectory and technological prowess can contribute to a balanced and equitable global order.

A recurring theme across sessions was India's aspiration to transition from a USD 4 trillion economy today to USD 30–35 trillion by 2047, guided by three foundational principles:

- Prosperity through Technology:** Democratizing access to technology and driving widescale adoption across sectors will be central to India's growth story. Initiatives in semiconductors, AI, green energy, and digital infrastructure are already positioning India as a global innovation hub.
- Trust through Ethical Engagement:** India's reputation as a trusted partner is reinforced by its proactive role in negotiating Free Trade Agreements (FTAs) and Preferential Trade Agreements (PTAs) with multiple regions. This trust-based approach is vital for building resilient supply chains and fostering long-term partnerships.

- Trade through Capability Building:** The Make in India mission, coupled with efforts to move up global value chains, has enabled India to achieve record exports of USD 825 billion in 2024–25, despite global headwinds. Foreign Direct Investment (FDI) inflows also touched USD 81 billion, reflecting investor confidence in India's economic fundamentals.

It was highlighted that India is on track to become the world's third-largest economy by 2026 and the largest by 2047, driven by robust manufacturing, digital transformation, and green transition initiatives.

The country is witnessing the establishment of two new Global Capability Centers (GCCs) every week, reinforcing its position as a global services hub. Strong Centre-State collaboration has accelerated poverty alleviation and created a conducive environment for business growth. This cooperative federalism was showcased through Andhra Pradesh's ambitious development agenda and its alignment with national priorities.



During the Summit, several nations expressed keen interest in deepening economic ties with India:

- a) Armenia positioned itself as a strategic bridge between Asia and Europe, inviting Indian investments in logistics, renewables, high-tech industries, agritech, and tourism.
- b) Canada seeks to leverage its natural resources and innovation ecosystem by partnering with India in AI, energy, critical minerals, ports infrastructure, and agriculture.
- c) Mauritius, with cumulative Indian FDI of USD 180 billion since 2000, is focusing on ocean economy, food security, green transition, and digital innovation, creating new opportunities for Indian businesses.
- d) Nepal is prioritising IT exports, BPO, e-commerce, and fintech, alongside tourism development.
- e) Singapore is collaborating with Andhra Pradesh on urban governance, human resource development, and sustainable economic growth, aligned with the state's Swarna Andhra Pradesh@2047 vision.
- f) Venezuela invited Indian participation in energy diversification and digital transformation, highlighting India's catalytic role in the Asia-Pacific green energy transition.
 - **Quantum Valley:** Plans to manufacture quantum computers within two years, positioning Andhra Pradesh at the forefront of next-gen computing.
 - **Green Energy Leadership:** Large-scale projects in green hydrogen and green ammonia, feeding into green data centers to support India's digital sovereignty.



- **Tourism Development:** Investment opportunities in Buddhist trails, temple circuits, handicraft experience centers, cruises, and homestays.
- **Entrepreneurship Mission:** The 'One Family, One Entrepreneur' initiative and the Ratan Tata Innovation Hub with five spokes to nurture startups and innovation.
- **Drone Taxis:** Plans to introduce drone-based urban mobility within two years.
- **Traditional Sectors:** Enhanced opportunities in agriculture, dairy, horticulture, aquaculture, food processing, rare earth mining, healthcare, and wellness services.

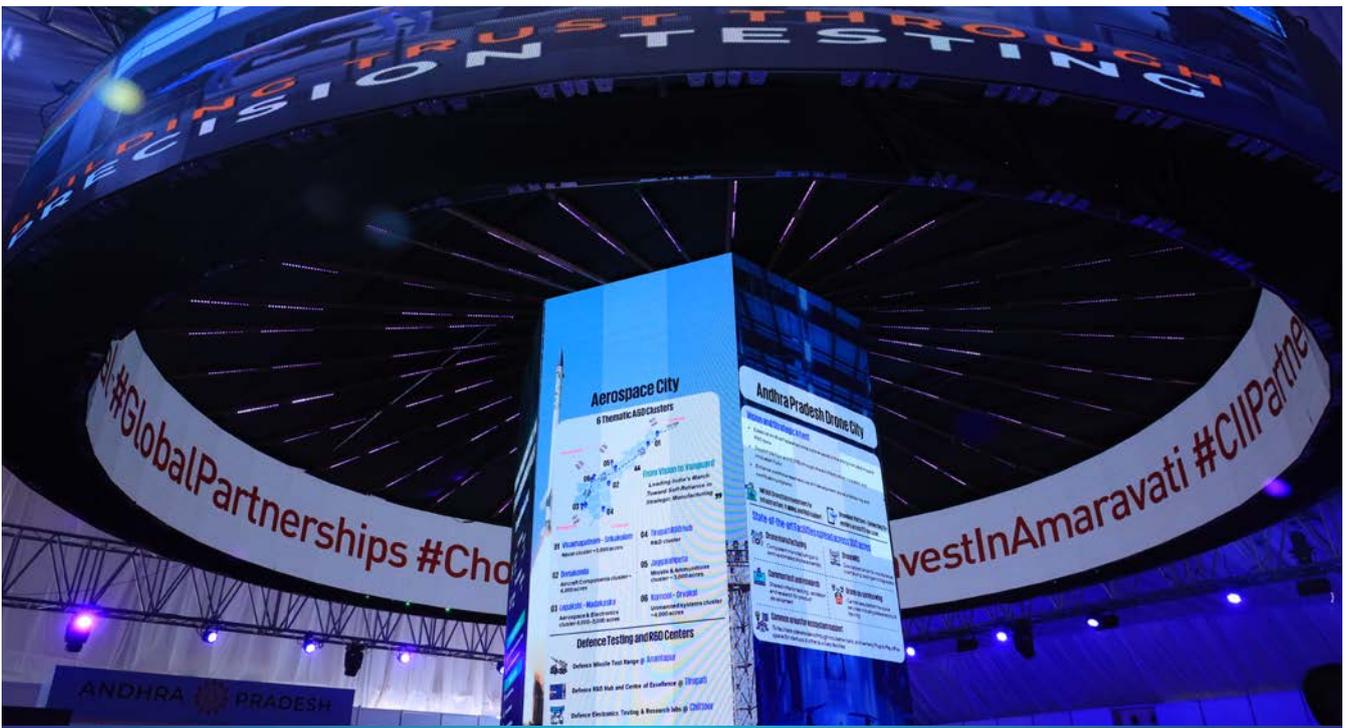
To bolster investor confidence, the state is working on escrow accounts backed by sovereign guarantees. Andhra Pradesh has set an ambitious target of attracting USD 1 trillion in investments, with half expected in the next three years. By 2047, the state envisions a USD 2.4 trillion economy with a per capita SGDP of USD 42,000 per annum.

A landmark announcement at the Summit was the USD 15 billion Google AI Hub in Visakhapatnam, the largest outside the US,

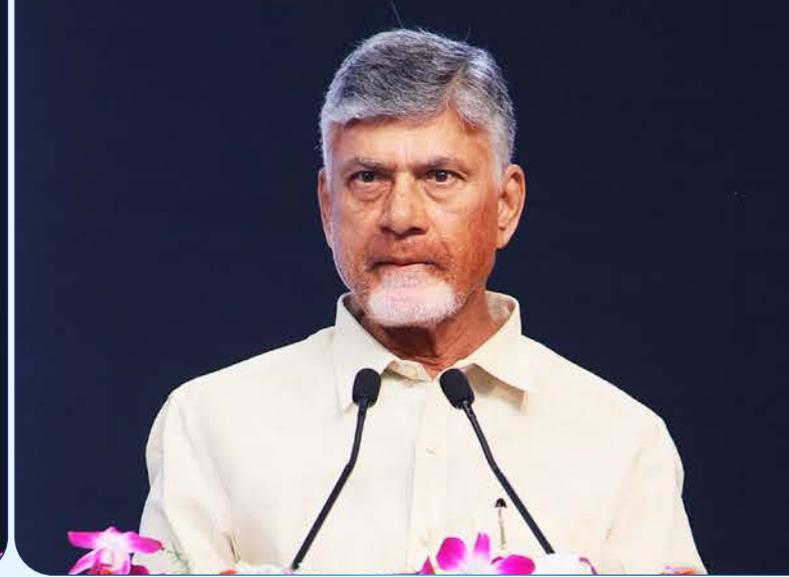


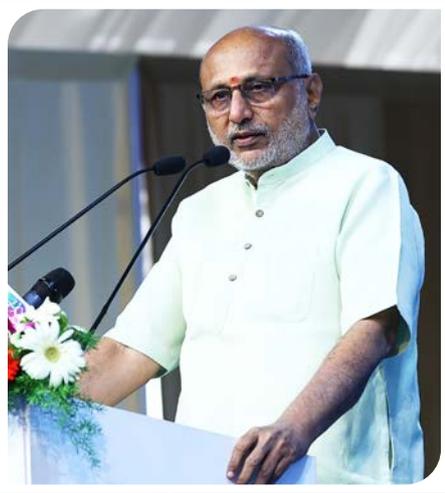
which will significantly advance India's quest for digital sovereignty.

The 30th CII Partnership Summit 2025 reaffirmed India's role as a driver of global growth and innovation. By leveraging technology, trust, and trade, India is not only shaping its own destiny but also contributing to a more inclusive and sustainable global economic order.









“

Together, we have strengthened e-governance, built world-class digital infrastructure, and created systems that reduce costs, increase transparency, and make doing business easier than ever. These achievements have elevated our nation to a trusted global trade partner, where technology and commerce work in harmony. We are now a knowledge-powered economy, and you are at the heart of this evolution. ”

Mr C P Radhakrishnan

Hon'ble Vice President of India

“

It's an honour that Andhra Pradesh is hosting CII Partnership Summit for the eighth time, a reflection of Andhra Pradesh's growing prominence as a hub of investment, trade and innovation. This year's theme, 'Technology, Trust and Trade: Navigating the New Geoeconomic Order', could not be more timely. The world is at an inflection point where technology and sustainability are reshaping economies and where collaboration, not competition, will define progress. With delegates from over 45 countries, and representation from leading multilateral organizations, this summit truly reflects the spirit of global cooperation. ”

Mr Syed Abdul Nazeer

Hon'ble Governor of Andhra Pradesh



“

For global peace, stability and prosperity, we must become self-reliant. In the next five years, we plan to double our clean energy to 500 gigawatt, one of the fastest ramp-up witnessed anywhere in the world. To our international partners, India offers not just a market, but a partnership for shared prosperity. ”

Mr Piyush Goyal

*Hon'ble Minister for Commerce and Industry
Government of India*





“ To accelerate industrial innovation, Andhra Pradesh is nurturing a robust start-up ecosystem, integrated with our universities and industrial clusters. The Andhra Pradesh Innovation Mission is supporting entrepreneurs in sectors like deep-tech, medtech, agritech and EV technology. We are also leveraging artificial intelligence, Internet of Things and data analytics to strengthen governance, logistics and industry operations. Our young workforce is talented, disciplined and multilingual and it is one of our greatest assets. ”

Mr N Chandrababu Naidu
Hon'ble Chief Minister of Andhra Pradesh

“ Agriculture is a cornerstone sector for the world and for Andhra Pradesh. When agriculture thrives, the environment thrives with it. To strengthen our surroundings, we must build a robust agricultural system. Every industry depends on raw materials, and it is our responsibility to support our hardworking farmers with the facilities they need to sustain and grow this vital sector. In agriculture, our annadaata- farmer is the key. We must rethink how we view this entrepreneur, because the farmer is the one who takes the highest risk and invests in an enterprise at the start of every single season. ”

Mr Kinjarapu Rammohan Naidu
Hon'ble Minister Civil Aviation, Government of India



“ Under the current leadership, we have made great investments in roads, ports, airports and digital public infrastructure, creating connectivity at unprecedented speed. We transformed Hyderabad into a IT capital, Vizag into an industrial and fintech city, Anantapur into an automobile hub, Tirupati into an electronics and mobile manufacturing hub. We brought future-focused like Genome Valley, creating jobs and global confidence. Andhra Pradesh offers what global investors see, from pharmaceuticals to fintech, from agriculture to aerospace. AP is where India's sectoral strengths concentrate. ”

Dr Pemmasani Chandra Sekhar
Hon'ble Minister of State, Rural Dev & Communications
Government of India



“ Andhra Pradesh has made significant strides in creating a business friendly ecosystem, driving innovation and promoting sustainable development. The state focuses on ease of doing business, progressive industrial policies, infrastructure development & skill enhancement that has made it an attractive destination for the investors. A strong central vision and dynamic state leadership have positioned Andhra Pradesh at an unparalleled advantage. I invite all industrial leaders and delegates to explore the immense potential this state holds for sustainable industrial growth. ”

Mr Bhupathi Raju Srinivasa Varma

Hon'ble Minister of State for Heavy Industries and Steel
Government of India

“ We live in a fast-changing world where markets, regulations and technology keep evolving. I have met thousands of investors and corporates in the last few years and the single most important requirement for a company is speed. They expect the same speed from the government. This speed needs to be a mission. We need to grant land permits, approvals, incentives with the speed that the project can take off and serve the markets. ”

Mr Nara Lokesh

Hon'ble Minister for Human Resources Development;
IT Electronics & Communication; RTG
Government of Andhra Pradesh



“ We stand here to reiterate that our alliance will support everything the state does, as we take the momentum built by early entrepreneurs of Andhra Pradesh even further. As we move ahead, we ask all of you to continue inspiring the youth of our great nation giving them the platform to innovate and become the next generation of entrepreneurs. Andhra Pradesh will always encourage, motivate and stand committed to industry. ”

Mr Nadendla Manohar

Hon'ble Minister of Civil Supplies, Food & Consumer Affairs
Government of Andhra Pradesh





“ I say this with absolute confidence that Andhra Pradesh is ready to execute if you are ready to invest. We already possess a long and strategically vital coastline, three world-class industrial corridors, well-developed industrial parks. We have the capability, the talent and the leadership to deliver outcomes at speed and at scale. What we seek today are partners who share this commitment, partners who believe in rapid execution, large-scale transformation and bold industrial growth. Together, let us ensure that this summit is not just an event, but the starting point of a new industrial decade for Andhra Pradesh. A decade that will redefine opportunity, accelerate development, and establish AP as a powerhouse of India’s economic future. ”

Mr T G Bharath

Hon’ble Minister of Industries & Commerce and & Food Processing Government of Andhra Pradesh

“ India is the fastest growing economy, resilient and resolute in every measure. With seamless collaboration between central and state governments, we are transforming ease of doing business and pioneering sectors like exports, semiconductors, defense and space. States like Andhra Pradesh lead with vision and innovation, earning global trust and investments. Our focus remains clear, that as a nation we need to create an ecosystem where innovation thrives, investment flows and opportunities multiply. By building bridges of technology, trust and trade, we are shaping a future of shared prosperity and enduring partnership. ”

Mr Rajiv Memani

President, Confederation of Indian Industry



“ Let us remember that Aatmanirbharta, or self-reliance, is about partnership, innovation, shared growth, and that India stands ready to work with the world to co-create solutions, strengthen value chains and build a resilient global future, where prosperity is both shared and sustainable. India has demonstrated this extremely well during the pandemic. ”

Dr (Ms) Suchitra K Ella

Vice President, Confederation of Indian Industry





“

The CII Partnership Summit is a powerful platform to share ideas and shape what's next for India and the world. We are delighted to witness strong participation from governments and a distinguished set of delegates. With 1,000+ B2B meetings lined up, the Summit is set to unlock new business opportunities. ”

Mr Chandrajit Banerjee

Director General
Confederation of Indian Industry (CII)

Overseas Dignitaries

“

Economic diversification and modernization are the tools that will lead us towards a stronger global order. India has emerged as our preferred partner in this modernization journey, a partnership built on mutual trust and respect for national institutions. Our collaboration has made one thing clear: to succeed in today's geopolitical landscape we must leapfrog traditional development challenges through the power of digital technology. ”

H E Mr Rui Miguel de Oliveira

Minister of Commerce and Industry of the
Republic of Angola



“

Armenia highly values its longstanding friendship with India, a nation that continues to demonstrate visionary leadership and impressive economic dynamism. India's achievements in innovation, digital technology and inclusive development are a source of inspiration for many countries, including Armenia. We are confident that this summit in India, a country that embodies growth through partnership, will generate new ideas, promote sustainable collaboration and create lasting opportunities for all participants. ”

H E Mr Gevorg Papoyan

Minister of Economy
Armenia





“ Economies of India and Canada naturally complement each other. Canada can provide natural resources such as energy, along with innovation, to help power India’s growth. By working together, government and industry, we can continue this positive momentum. Ultimately, it is our businesses that will drive this partnership forward and elevate our relationship to new heights. ”

The Honourable Mr Maninder Sidhu
Minister of International Trade
Canada

“ African manufacturing is expanding through Indian investment, and Africa’s young talent is gaining from India’s wealth of experience, which is supported by Mauritius’ regional strengths in infrastructure, education and finance. Our trust has been built over decades of partnership with India. We are now working with CII and partner countries to explore the creation of a Mauritius–India–Africa Business Innovation Forum, a permanent platform to transform today’s ideas into tomorrow’s projects. ”

Hon John Michaël Tzoun Sao Yeung Sik Yuen
Minister of Commerce and Consumer Protection
Mauritius



“ India is Nepal’s largest trading partner and the main transit-providing country for trade access with other countries. India–Nepal partnership drives sustainable growth, innovation, technology transfer, and prosperity in our region. ”

Hon Mr Anil Kumar Sinha
Minister for Industry, Commerce and Supplies
Nepal





“

For New Zealand, WTO rules and the international trading system are the foundations of trust, creating a predictable environment where businesses can plan with confidence. They promote fairness and give every nation a stake in shared prosperity, enabling our economies to take risks, innovate, and enter new markets. Our trade agreements have safeguarded supply chains and reduced economic vulnerabilities. These frameworks allow us to partner with trust and transparency, build durable economic relationships, and reinforce the belief that cooperation drives progress. ”

H E Mr Todd McClay

*Minister for Trade and Investment, Minister for Agriculture and Forestry and Associate Minister for Foreign Affairs
New Zealand*

“

We have put in place a wide-ranging and comprehensive strategic partnership between the two countries. The India-Singapore Ministerial Roundtable and the India-Singapore Business Roundtable are the structural mechanisms that underpin our cooperation in many areas including sustainability, digitalization, skills development, connectivity, healthcare & medicine, and advanced manufacturing. Our people-to-people ties and business-to-business ties are long-standing and extremely strong. Many Singaporeans have deep roots in India and many Singaporean companies are investing in India and doing good business with Indian partners and vice versa. ”

H E Mr K Shanmugam

*Coordinating Minister for National Security and
Minister for Home Affairs, Singapore*



“

Venezuela represents a key player to the global mining industry, ranking among the top countries in minerals essential for the energy transition. We have nickel, iron, bauxite, and coal in huge quantities. We are confident that cooperation with India will continue to strengthen, taking advantage of opportunities to expand technical and productive capacities, and foster technological enterprises within the industrial space. ”

H E Mr Héctor José Silva Hernández

*Minister of People's Power for
Ecological Mining Development of Venezuela*





“ We have the opportunity to reform trade through changes in supply chains, green valleys and digital accessibility. India is already a pioneer in such initiatives. Let us all work together to improve and strengthen the global trading system that has largely delivered a lot to the world and should deliver more for developing countries. ”

H E Dr Ngozi Okonjo-Iweala
 Director-General
 World Trade Organization

“ The Indian economy continues to grow due to robust domestic demand and sustained capital investment. With cutting-edge technologies in smart cities and high-speed rail, India constructs corridors of commerce that link its billion dollars aspiration to the world market. In the digital frontier, India has emerged as a global leader. The Digital India campaign, propelled by government-led reforms in data governance and broadband expansion, has democratized access to technology for millions. ”

H E Ms Armida Salsiah Alisjahbana
 Executive Secretary, UN Economic and Social Commission (UNESCAP) and Under-Secretary-General United Nations (UN)





Inaugural Session

Chief Guest

H.E. Mr C P Radhakrishnan
Hon'ble Vice President of India

Guests of Honour

H.E. Mr S Abdul Nazeer
*Hon'ble Governor of
 Andhra Pradesh*

Mr Piyush Goyal
*Hon'ble Minister for
 Commerce and Industry
 Government of India*

Mr N Chandrababu Naidu
*Hon'ble Chief Minister of
 Andhra Pradesh*

Speakers

Mr Kinjarapu Rammohan Naidu
*Hon'ble Minister Civil Aviation
 Government of India*

Dr Pemmasani Chandra Sekhar
*Hon'ble Minister of State
 Rural Dev & Communications
 Government of India*

**Mr Bhupathi Raju
 Srinivasa Varma**
*Hon'ble Minister of State for Steel
 Government of India*

Mr Nara Lokesh
*Hon'ble Minister for
 Human Resources Development; IT
 Electronics & Communication; RTG
 Government of Andhra Pradesh*

Mr Nadendla Manohar
*Hon'ble Minister of Civil Supplies
 Food & Consumer Affairs
 Government of Andhra Pradesh*

Mr T G Bharath
*Minister of Industries & Commerce
 and & Food Processing
 Government of Andhra Pradesh*

Mr Rajiv Memani
*President
 Confederation of Indian Industry
 (CII), India*

Mr Karan Adani
*Managing Director
 Adani Ports & SEZ Ltd (APSEZ)*

Mr G M Rao
*Group Chairman
 GMR Group*

Mr Sanjiv Bajaj

Chairman and Managing Director
Bajaj Finserv Ltd

Ms Shobana Kamineni

Promotor Director
Apollo Hospitals Enterprise Limited
& Executive Chairperson
Apollo Health Co Limited

Dr (Ms) Suchitra K Ella

Vice President
Confederation of Indian Industry
(CII)

Mr Amit Kalyani

Vice Chairman &
Joint Managing Director
Bharat Forge Limited

Mr Sudarshan Venu

Chairman and Managing Director
TVS Motor Company

Mr Yusuf Ali

Chairman and Managing Director
Lulu Group International

Moderated by

Mr Chandrajit Banerjee

Director General
Confederation of Indian Industry (CII)

Key Highlights of the Discussion

- A self-reliant India under Hon'ble Prime Minister Shri Narendra Modi has played a pivotal role in ensuring global peace and stability. In this context, the country's aspiration to grow from the current level of ~USD 4 trillion to an estimated USD 30-35 trillion by year 2027, will be guided by three principles:
 - Prosperity through democratisation of technology access and widescale application of technology. This is illustrated by examples, such as:
 - ✓ Aadhaar for digital identity to all citizens of India
 - ✓ Semiconductor ecosystem that is being created in the country
 - ✓ The IndiaAI Mission for democratising access to AI
 - ✓ India's Unified Payment Interface (UPI) payment platform that is being accessed by millions of people
 - Trust through righteousness, evidenced by India's engagement as the trusted partners to countries around the world and several FTAs and PTAs being negotiated and concluded with different regional blocs and countries.
 - Trade through capabilities whereby India establishes its comparative advantage through its Make in India mission, innovation at scale, diversification of export markets, and efforts to move Indian products up the global value chains. These have resulted in:
 - ✓ India becoming second largest user of ChatGPT
 - ✓ Mars Mission and launching 10 satellites in a single mission
 - Trade through capabilities whereby India establishes its comparative advantage through its Make in India mission, innovation at scale, diversification of export markets, and efforts to move Indian products up the global value chains. These have resulted in:
 - ✓ Indian exports scaling the record USD 825 billion mark in 2024-25, despite difficult global economic conditions

- ✓ FDI inflows into India recording a high USD 81 billion in 2024-25
- To translate the three principles into action over the long term, and to withstand the global headwinds, the recommended measures are to:
 - Step up two-way investment flows with countries around the world by reducing the trade barriers
 - Deepen bilateral and multilateral cooperation in technology development by co-developing frontier technologies and high-impact innovations
 - Increase trust in the multilateral regime through transparent governance.
- It was stated in the session that India is set to become the third-largest economy in the world by the year 2026, and the largest economy by the year 2047.
- On the business turf, India is charging ahead with cellphone exports, semiconductor, defence and aerospace manufacturing, green transition, among others.
- India's economic achievements over the last 10 years and a conducive domestic environment for business to grow have also played their part in significant poverty alleviation. It was stated that strong Centre-State relations are yielding strong socio-economic results on the ground.
- On a higher plane, it was said that India looks to cooperate with the world for a better tomorrow, and not just compete, in the interest of global societies.
- Andhra Pradesh is one of India's most dynamic state economies, drawing high investor interest in areas, such as space, electronics manufacturing, aerospace, drone tech, defence, robotics, among others. Government of Andhra Pradesh is also establishing a Quantum Valley and has plans to establish manufacturing of quantum computers in the state within a 2-year timeframe.
- There are also plans to develop and introduce drone taxis in the state in the next two years.
- In the realm of green energy, Andhra Pradesh is creating significant capacity for the production of green hydrogen and green ammonia. The green energy will also feed into green data centres that are planned for the state.
- The state has also enhanced investment opportunities in traditional sectors, such as, agriculture (commercial crops and organic farming in particular), dairy, horticulture, and aquaculture. Food processing was cited as another sector that offers key investment opportunities. Rare earths mining, healthcare infrastructure and wellness services also found mention in reference to the opportunity universe.
- To further augment investor confidence in the state business landscape, Andhra Pradesh government is working on introducing escrow accounts for investors that will likely be backed by a sovereign guarantee extended by the state government.
- Government of Andhra Pradesh has set vision of attracting USD 1 trillion worth of investments into the state in the coming years, with half of that being achieved over the next three years. It was stated that by year 2047, Andhra Pradesh will become a USD 2.4 trillion state economy with a SGDP per capita of USD 42,000 per annum.

- The recently announced plan for a USD 15 billion Google AI hub in Visakhapatnam, the largest hub outside the US, will give India its digital sovereignty.
- Time is the ultimate currency for business today. In keeping with this, Andhra Pradesh has shifted its focus from just improving Ease of Doing Business to enhancing Speed of Doing Business.
- Modern logistics infrastructure is a lever for creating an attractive business regime. Toward this, the state has planned for establishing seven more airports, flight training infrastructure, an MRO ecosystem, drone city, and an aerospace manufacturing base.
- Minister Goyal recommended the setting up of a world-class expo and conference centre in Vizag likened as 'Andhra

Mandapam', through a joint Centre-state initiative. Concurring with this suggestion Chief Minister N Chandrababu Naidu suggested that the next edition of the Partnership Summit may also be conducted in Visakhapatnam, and that the proposed world-class expo and conference centre will be established in a short timeframe and that a suitable site will be made available for the same.



Key Recommendations

- **Build Clear Pathways for Global and Domestic Investors:** Strengthen regulatory clarity, reduce approval complexities and provide predictable mechanisms that encourage long term investment participation.
- **Accelerate Cooperation in Advanced Technology Sectors:** Develop structured programmes for co-development in AI, semiconductors, quantum technologies, robotics and new energy systems.
- **Expand Frameworks for Trustworthy and Transparent Global Engagement:** Strengthen mechanisms that reinforce India's reputation as a stable and reliable partner in trade, investment and diplomacy.
- **Advance Andhra Pradesh as a Diversified Economic Hub:** Pursue simultaneous development of high tech ecosystems and traditional sectors to create a balanced, resilient economic structure.
- **Improve Time Efficiency Within Administrative Systems:** Adopt reforms such as escrow based mechanisms, automated approvals and strict process timelines to increase investor confidence.
- **Prioritise Integrated Infrastructure that Supports Global Competitiveness:** Develop logistics corridors, aviation and space infrastructure, energy ecosystems and digital capacity that enable industry to scale efficiently.



Opening Plenary

Guests of Honour

Mr Piyush Goyal

*Hon'ble Minister for Commerce and Industry
Government of India*

Special Guests

H E Mr Rui Migueis de Oliveira

*Minister of Commerce and Industry of
the Republic of Angola*

H E Mr Gevorg Papoyan

*Minister of Economy
Armenia*

HE Mr Maninder Sidhu

*Minister of Export Promotion
International Trade and
Economic Development, Canada*

Hon John Michaël Tzoun Sao Yeung Sik Yuen

*Minister of Commerce and
Consumer Protection, Mauritius*

Hon Mr Anil Kumar Sinha

*Minister for Industry
Commerce and Supplies
Nepal*

H E Mr K Shanmugam

*Coordinating Minister for
National Security and
Minister for Home Affairs, Singapore*

H E Mr Héctor José Silva Hernández

*Minister of People's Power for
Ecological Mining Development of
Venezuela*

Dr Ngozi Okonjo-Iweala

*Director-General
World Trade Organization*

Ms Armida Salsiah Alisjahbana

*Executive Secretary
UN Economic and Social
Commission (UNESCAP) and
Under-Secretary-General
United Nations (UN)*

Remarks

Mr Rajiv Memani

*President
Confederation of Indian Industry (CII)*

Moderated by

Mr Chandrajit Banerjee

*Director General
Confederation of Indian Industry (CII)*

Key Highlights of the Discussion

- The Partnership Summit has attracted delegate participation from 62 countries, setting the ground for greater bilateral investment flows between India and the participating countries.
- It was cited that even as various bilateral and regional trade agreements are being negotiated and concluded between various countries, reinforcing the rules-based multilateral trade systems under the auspices of the WTO is critical for the stability of the global economy. Even today, 72% of world trade is being conducted according to WTO terms. It was pointed out that businesses around the world would benefit greatly from a rules-based trading system.
- As a case in point, WTO's Customs Valuation establishes a uniform system for determining the value of imported goods for customs duties. This system is based on the actual commercial transaction value whenever possible, preventing the use of arbitrary or fictitious values to ensure fair trade, accurate tax collection, and transparent, predictable rules for importers and exporters.
- In addition, WTO is playing a pivotal role in the protection of intellectual property rights, which is of the essence to industry and investors.
- While WTO has upgraded forecast for global merchandise trade volume growth in 2025 to 2.4% from an earlier projection of 0.9% due to several factors, it has sharply lowered its 2026 forecast for global merchandise trade volume growth to 0.5%, owing to the fallout of tariffs imposed by the US.
- For the multilateral, rules-based trading system to be sustained, bodies like WTO need to undergo reforms, and India has a key role in furthering these reforms.
- At a country level, Angola is looking to replicate India's digital public infrastructure model that would set the ground for participation of Indian companies and investors in that area. Indian investments are being sought in areas like logistics, including railway networks, upstream and downstream energy development, renewables, critical mineral processing, agriculture modernisation, seed technology and farm mechanisation, pharm manufacturing, and healthcare infrastructure development.
- Armenia sees a key role for Indian investments in the country, even as the Eurasian nation becomes the veritable bridge between Asia and Europe for business. Investment prospects are bright in sectors like logistics, renewables, high-tech industries, agritech, energy, tourism and communications.
- Canada seeks to strengthen the economic cooperation with India by aligning the country's natural resources base and innovation focus with the inflow of Indian investments. AI, energy, critical minerals, logistics including ports infrastructure, and agriculture were among the sectors highlighted for cooperation.
- India is a key trade and investment partner of Mauritius. As the island nation steps up the focus on ushering in a new economic model, while promoting the ocean economy, food security measures, green transition, digital innovation and consumer

protection and fair practices, there is growing scope for Indian investments in areas that support the stated goals. Cumulative Indian FDI in Mauritius in the period 2000–2025 stands at USD 180 billion.

- Nepal is directing sharp focus on IT software exports, BPO, e-commerce and fintech, and is inviting foreign investments in these areas. Tourism development was cited one key investment opportunity in the country.
- Singapore is working with Andhra Pradesh within a framework of cooperation for sustainable urban governance, human resources development, sustainable economic development, among others, that tie into the state's Swarna Andhra Pradesh @ 2047 mission.
- Venezuela seeks Indian investor participation in the country's economic diversification and focus on priority sectors like energy. It was pointed out that India could play a catalytic role in the areas of

digital transformation and green energy transition in the Asia-Pacific region.

- It was cited in the session that Andhra Pradesh has created a highly attractive investment climate in diverse sectors that include green energy (including for micro-grids, green hydrogen, green ammonia), horticulture and aquaculture with certification and traceability, AI backed by innovation hubs and spokes, training, use case creation, among others. Particular emphasis was placed on investment opportunities in the tourism sector that includes Buddhist trails and temple circuits, experience centres for handicrafts and handlooms, cruises, homestay promotion, among others.
- Government of Andhra Pradesh has launched the mission to nurture one entrepreneur in every family through its clarion call for 'One Family, One Entrepreneur'. On a higher plane, the state has also established the Ratan Tata Innovation Hub, which has five spokes that support entrepreneurship development.

Key Recommendations

- **Strengthen Multilateral Trade Cooperation:** Advance reforms that enhance fairness, predictability and transparency within global trade governance.
- **Expand Bilateral Economic Pathways With Countries Across Geographies:** Develop targeted sectoral partnerships in logistics, renewable energy, digital innovation, agriculture, minerals and advanced manufacturing.
- **Position India as a Leader in Trusted Digital Governance:** Support global interest in replicating India's digital public infrastructure through structured cooperation and technical partnerships.
- **Step Up Accelerate Andhra Pradesh's Clean Energy And Innovation Agenda:** Scale initiatives in renewable energy, traceable agriculture, AI enabled industries and skill based innovation hubs.
- **Deepen Tourism Centric Investment Strategies:** Strengthen heritage circuits, cultural experiences, sustainable tourism infrastructure and community based tourism models.
- **Support Widespread Entrepreneurship And Enterprise Formation:** Expand training, incubation, certification and mentorship frameworks that enable one entrepreneur per family and strengthen local industry participation.

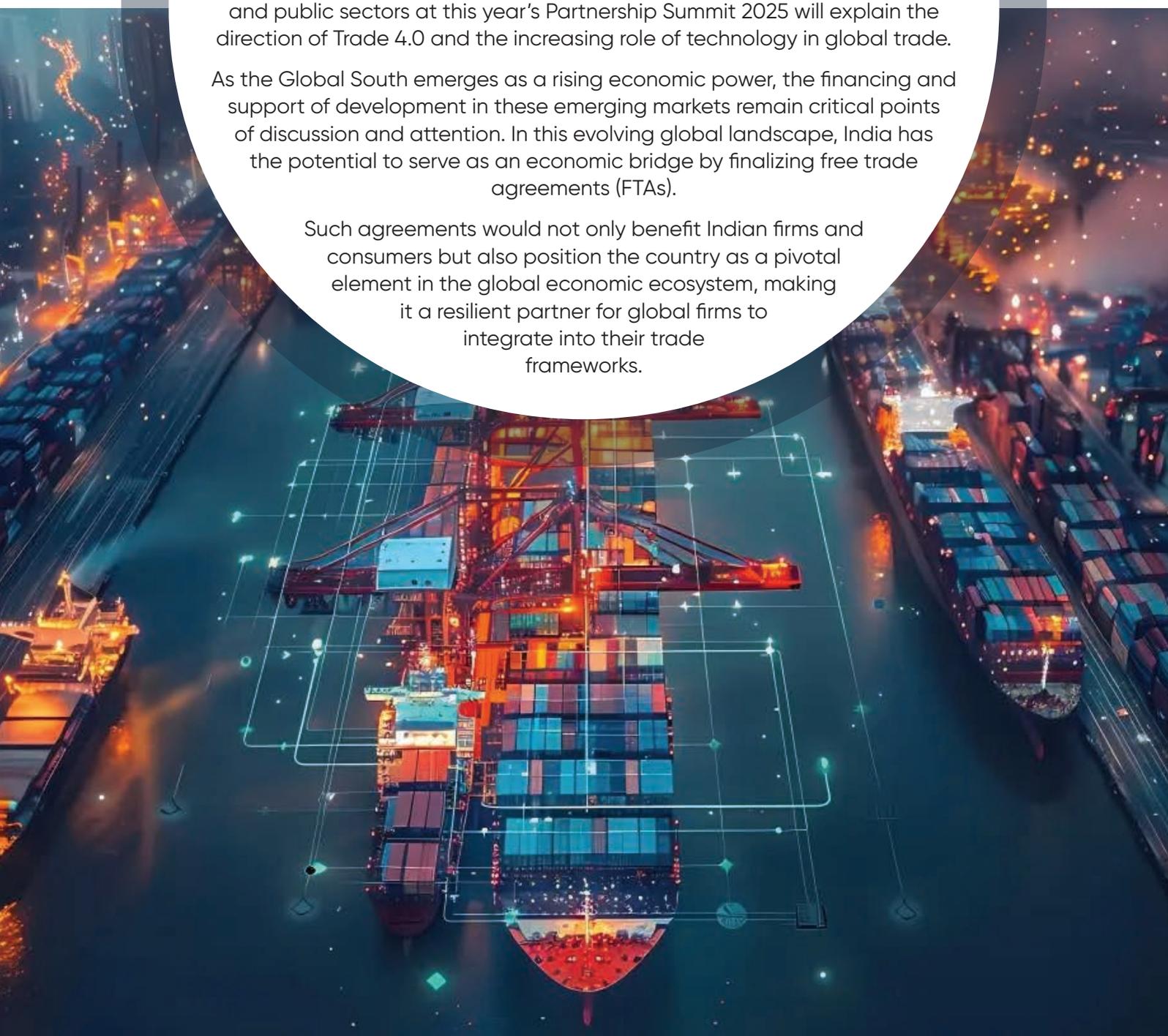
Track I – Trade

The track on trade aims to create and develop resilient Global Value Chains (GVC) to influence the future of the global trading order. Geopolitical and geoeconomic changes have resulted in shifts in both regional and multilateral value chains towards diversification for goods and services products.

During this period of adjustment, discussions among leaders in the private and public sectors at this year's Partnership Summit 2025 will explain the direction of Trade 4.0 and the increasing role of technology in global trade.

As the Global South emerges as a rising economic power, the financing and support of development in these emerging markets remain critical points of discussion and attention. In this evolving global landscape, India has the potential to serve as an economic bridge by finalizing free trade agreements (FTAs).

Such agreements would not only benefit Indian firms and consumers but also position the country as a pivotal element in the global economic ecosystem, making it a resilient partner for global firms to integrate into their trade frameworks.





Fireside Chat on Strengthening Multilateralism: Trust, Partnership and Inclusive Development

in conversation with

Mr Chandrajit Banerjee

*Director General
Confederation of Indian Industry (CII)*

H. E. Dr Ngozi Okonjo-Iweala

*Director-General
World Trade Organization*

Key Highlights of the Discussion

- The current strain on the global trading system is the most severe seen in decades and merits urgent global attention toward reinforcing multilateralism. However, despite turbulence, the global trading system largely continues to operate on WTO rules, with ~72% of world trade conducted on WTO/MFN terms.
- At the same time, countries and firms are seen to be waking up to over-dependence on single suppliers/markets. It was stated that such diversification benefits India and other emerging producers. WTO welcomes WTO-consistent FTAs as mechanisms for diversification and deeper cooperation, provided they are reported and aligned with WTO norms.
- Keeping in view the critical role of business in sustaining the multilateral trading system, WTO urged businesses (big and small) to submit practical evidence of trading challenges to inform reform priorities. It was stated that equitable AI adoption could expand global trade substantially. WTO study projects up to +40% by 2040. However, uneven adoption risks are widening inequality.
- The WTO Appellate Body remains hobbled since 2019, but alternatives like the Multi-Party Interim Appeal Arbitration

Agreement (MPIA) to create a functioning appeal process alternatives (MPIA) are in operation with 58 members. The aim is to increase this to ~100 members by the 14th Ministerial Conference (MC14) of the World Trade Organization (WTO), which will be held in Yaoundé, Cameroon, during March 26–29, 2026.

- WTO members expect MC14 to identify and set modalities for settling long-standing issues, such as permanent solutions on food security past mandates). It was pointed out that closer engagement between trade and environmental communities is needed to avoid fragmentation and unintended protectionism. With respect to carbon pricing and interoperability, proliferation of ~113 carbon pricing schemes highlights the need for global methodologies and interoperable standards to reduce trade frictions.
- The session threw light on the imperative for large, poorly targeted subsidies to be reallocated for adaptation and green investments. The fisheries subsidies reform was cited as a case in point. It was

highlighted that evidence shows women-led SMEs engaged in international trade earn significantly more, and that WTO initiatives such as capacity-building programs and digital trade funds are supporting female traders. WTO/partners have launched schemes including a USD 50 million women’s fund for digital trade and an International Trade Centre to support MSMEs.

- Underscoring the role of MSMEs as a high employment generator, WTO working groups and business advisory structures now explicitly include MSME voices to shape pragmatic, inclusive rules.
- The growing convergence of products and services demands new approaches to standards, certification, and cross-border interoperability. Certain domain-specific issues such as central banking, financial regulation, and the use of AI in financial systems are best handled by specialised authorities, making effective coordination essential.

Key Recommendations

- **Restore Confidence in the Multilateral Dispute Settlement Mechanism:** Expand participation in interim appeal structures and prioritise consensus on long term reforms that ensure timely, fair and predictable resolution of trade disputes.
- **Strengthen Global Frameworks for Digital Trade And AI Governance:** Advance negotiations on data flows, digital services and AI enabled trade, supported by evidence from business communities to ground rules in operational realities.
- **Promote Transparent and Interoperable Sustainability Standards:** Develop harmonised methodologies on carbon measurement, certification and environmental norms to reduce trade friction and avoid unintended protectionism.
- **Enhance Coordination Across Trade, Financial and Regulatory Systems:** Support integrated approaches that address cross sectoral issues such as AI in finance, carbon pricing interoperability and green subsidy reforms.



Gateway to Growth: The Trade and Investment Imperative

Keynote Address

H. E. Ms Armida Salsiah Alisjahbana

Executive Secretary, UN Economic and Social Commission (UNESCAP) and Under-Secretary-General United Nations (UN)

H. E. Mr Minn Minn

Deputy Minister Ministry of Commerce Myanmar

H. E. Mr Penn Sovicheat

Vice Minister Ministry of Commerce Cambodia

Mr Tetsuya Watanabe

President, Economic Research Institute for ASEAN and East Asia (ERIA) Indonesia

Panellists

Mr Neeraj Gupta

Principal Investment Officer International Finance Corporation India (IFC)

Ms Natasha Majumdar

Director-South Asia Amfori

Moderated by

Mr Narayan Sethuramon

Co-Chairman, CII International Council and CII Trade Policy Council and Managing Director Sanmar Matrix Metals Ltd

Key Highlights of the Discussion

- The session underscored two interconnected challenges facing many countries, particularly in the Global South, as they strive to sustain long-term economic growth and development.
- First, the convergence of per capita income levels between developing economies and global frontier countries has slowed, driven by weaker labour productivity growth and diminishing returns from capital investment. Second, several economies remain concentrated in low value-addition segments of global supply chains, making it increasingly difficult to upgrade into high-value activities amid rising protectionism and intensifying technological competition.
- Strategic trade and investment partnerships were identified as essential to overcoming these structural constraints. Forward-looking alliances that transcend borders, particularly those forged through comprehensive FTAs, can help diversify trade routes, strengthen supply-chain resilience, channel investments into high-impact sectors, and accelerate sustainable economic development. Priority areas for such partnerships include green technologies, digital infrastructure, and resilient production networks.
- Indian cities today face substantial infrastructure requirements to meet essential public service obligations and build resilient, low-carbon infrastructure. The gap between current investment levels and projected needs underscores the importance of enhancing city-level financial capacity and project bankability.
- The panel outlined several key factors essential for capitalising on the proposed India-EU FTA's potential:
 - First, trade will serve as a catalyst for growth. The progressive removal of EU tariffs, especially in high-tariff sectors such as agriculture, apparel, and textiles, is likely to boost India's export competitiveness. Indian producers reliant on domestic raw materials, particularly cotton, are expected to benefit from meeting Rules of Origin requirements, gaining an advantage over competing economies.

At the same time, tariff reductions will allow Indian consumers and businesses access to a wider range of high-quality European products, fostering greater choice, innovation, and competition.

 - Second, the session highlighted the importance of investment as a two-way driver of growth. Under the Make in India vision, European firms are increasingly exploring opportunities to establish manufacturing and innovation capacities in India. Addressing longstanding investment barriers through the FTA is expected to further



encourage operational efficiency and ease of doing business, benefiting investors, Indian partners, and the broader workforce.

- Sustainability emerged as a central pillar of the discussion. European companies operate under stringent regulatory frameworks including Carbon Border Adjustment Mechanism (CBAM) and deforestation regulations. As European firms deepen sourcing and investment ties with India, they will seek assurance of responsible business practices across supply chains. India's progress in labour reforms, compliance mechanisms, and digitisation provides a strong foundation, although continued engagement, including consideration of ratifying remaining ILO core conventions, will strengthen India's position as a trusted long-term partner.
- Cooperation between India and Southeast Asia was cited as increasingly important in shaping more equitable and sustainable value chains. India-ASEAN relations can deepen rules-based



economic collaboration while expanding connectivity through trade facilitation, logistics enhancement, and digital infrastructure development. To build on this foundation, cooperation must move beyond policy alignment and evolve into deeper partnerships connecting industries, technologies, and people. Areas such as joint manufacturing, technological co-creation, and human capital development will play a critical role.

- The session concluded with the assertion that the true "gateway to growth" lies not in geography but in trust-based partnerships.



Key Recommendations (in separate panel)

- **Strengthen Strategic Trade Partnerships with Key Regions:** Expand India's structured engagement with ASEAN, the European Union and Indo-Pacific partners to build resilient value chains and improve market access.
- **Accelerate Export Competitiveness Reforms:** Improve India's standards harmonisation, certification systems, digital trade facilitation and logistics efficiency to reduce transaction costs.
- **Deepen Regional Logistics Connectivity:** Invest in maritime routes, port linkages and cross-border corridors to position India as a central logistics hub in the Indo-Pacific.
- **Align Investment Policy With Emerging Global Priorities:** Simplify compliance, strengthen contract enforcement and scale industrial corridors that attract long term capital.





Discussions with UNDP on India-Japan Policy Dialogue on Responsible Business Practices

Speakers

Dr N Yuvaraj

Secretary, Department of Industries and Commerce
Government of Andhra Pradesh

Dr Angela Lusigi

Resident Representative
UNDP India

Mr Kaoru Shiraishi

DG
JETRO Chennai

Mr Nishant Arya

Vice Chairman and
Managing Director
JBM Group

Mr Rajesh Mittal

President and Managing Director
ISUZU Motors India Pvt Ltd

Mr Murali Krishna Gannamani

Chairman, CII Andhra Pradesh
State Council and Founder &
Chief Executive Officer
Fluentgrid Ltd

Moderated by

Ms Nusrat Khan

Business and Human Rights Specialist
UNDP India

Key Highlights of the Discussion

- The deliberations commenced with a powerful message that in an era marked by geopolitical disruptions, evolving ESG regulations, and shifting global supply chains, responsible business conduct is now a strategic necessity. For India and Japan, partners bound by trust, long-term investment, and complementary strengths, this moment presents a unique opportunity to align economic cooperation with sustainability, resilience, and ethical business standards.
- The discussion foregrounded the depth of Japan's economic engagement in India. Between April 2000 and September 2024, Japanese FDI exceeded USD 43 billion, with more than 1,400 Japanese companies operating across automotive, electronics, precision engineering, chemicals, logistics, and textiles.
- Speakers noted that Japanese investor confidence in India continues to rise, as in 2024 a large proportion of Japanese companies in India expected to see profits, while the majority planned to expand operations, the highest among Asia-Pacific economies.
- Indian companies stressed that technology-driven competitiveness, sustained R&D investment, and a global total-cost-of-ownership approach are now essential to meet stringent sustainability norms in Europe, the US, and East Asia. They emphasised that disciplined manufacturing and engineering-led innovation are jointly creating a more responsible, resilient, and globally competitive industrial ecosystem in India.



- The panel also examined the rapid evolution of the regulatory landscape for responsible business. Global and national frameworks such as India's Business Responsibility and Sustainability Reporting (BRSR) mandate and Japan's Guidelines on Respecting Human Rights in Responsible Supply Chains were highlighted as aligned with the UN Guiding Principles on Business and Human Rights, signalling a shared commitment to due diligence, transparency, and ethical conduct.
- However, findings from a CII-UNDP study revealed important gaps. While many Japanese companies in India recognise human-rights risks in their supply chains, only a small portion have established formal due-diligence systems related to working conditions and safety, underscoring the need for stronger capacity-building and clearer implementation tools.
- Four major priorities were highlighted, which are building policy frameworks that align national guidelines with state implementation; deep handholding for MSMEs; shared cost mechanisms between government and large enterprises; and enhanced collaboration with Japanese partners for technology transfer, training, and ESG capability building.

This recognition that MSMEs cannot meet global expectations without structural support was echoed by industry speakers.

- The session highlighted a strategic dimension by presenting investment patterns, emphasizing on the need to diversify Japanese projects within Andhra Pradesh. Although Japanese investments in the state are promising, they remain concentrated in three clusters near the Tamil Nadu border.
- The session concluded with a shared commitment to deepen India-Japan cooperation in responsible business

practices, strengthen MSME capabilities, expand joint ESG frameworks, and build resilient, diversified, and future-ready supply chains.



Key Recommendations

- **Develop a Joint India-Japan Responsible Supply Chain Framework:** India and Japan should align India's Business Responsibility & Sustainability Reporting (BRSR) with Japan's Responsible Supply Chain Guidelines into a unified framework supported by sector-specific due-diligence tools. Shared ESG reporting formats and harmonised supplier audit mechanisms should prioritise Tier-2 and Tier-3 suppliers, where human rights, environmental, and compliance risks are most concentrated.
- **Build MSME Capability Through Co-Financed Support Programmes:** Governments and anchor companies should co-finance MSME capability upgrades covering safety standards, environmental compliance, energy efficiency, grievance redressal, and digital traceability. Shared-cost support models would accelerate compliance adoption, reduce risk across supply chains, and ensure smaller firms are not excluded from global value networks.
- **Expand Industrial Collaboration And Localisation In New Growth Sectors:** India and Japan should promote investment in emerging industrial clusters, particularly in Andhra Pradesh, focusing on EV components, semiconductor packaging, precision engineering, and electronics. Plug-and-play infrastructure, integrated logistics, and fast-track administrative approvals can support localisation, diversification, and resilient bilateral manufacturing ecosystems.
- **Establish India-Japan Centres For Responsible Manufacturing:** Dedicated centres should be set up in key industrial hubs to support workforce training, certification, digital sustainability tools, and joint R&D. These centres would diffuse Japanese production excellence, promote zero-defect manufacturing, and enable globally compliant, traceable, and sustainability-driven supply chains across Indian industry.



Crisis to Competitiveness: Reinforcing Economic Security

Keynote Address

H E Mr Todd McClay

Minister for Trade and Investment
Minister for Agriculture and
Forestry and Associate Minister for
Foreign Affairs, New Zealand

H E Mr Rui Miguel de Oliveira

Minister of Commerce and
Industry of the Republic of Angola

Panellists

Mr Richard Rossow

Senior Adviser & Chair on India &
Emerging Asia Economics Center for
Strategic & International Studies
United States

Dr Rajan Sudesh Ratna

Deputy Head & Senior Economic
Affairs Officer UNESCAP
South & Southwest Asia Office

Ms Subhashini Abeysinghe

Research Director
Verite Research
Sri Lanka

Mr Prabhakar Garimella

CEO-International Business
Ralson Tyres Limited
New Delhi

Ms Jodi McKay

Director, Australia-India CEO
Forum Business Council of
Australia

Moderated by

Dr (Ms) Suchitra K Ella

Vice President
Confederation of Indian Industry (CII)
and Managing Director
Bharat Biotech International Ltd

Key Highlights of the Discussion

- The past decade has fundamentally reshaped the global economic environment. Over-dependence on specific geographies, fragile logistics networks, and rising protectionist measures have pushed nations around the world to focus on strengthening their strategic sectors, such as, semiconductors, renewable energy, and advanced manufacturing systems.
- The session outlined four major pillars underpinning India's evolving approach to economic security:
 - Strengthening domestic capabilities, supported through initiatives such as the Production-Linked Incentive (PLI) Scheme and the National Logistics Policy aimed at deepening industrial capacity and improving competitiveness.
 - Diversifying trade partnerships to reduce risk exposure amid rising global trade restrictions.
 - Securing access to critical and emerging technologies, achieved by cultivating strong partnerships with trusted countries such as the US, Japan, and the European Union.
 - Enhancing strategic autonomy by participating actively in platforms such as Indo-Pacific Economic Framework for Prosperity (IPEF), BRICS, and the G20 to shape global rules and reduce dependence on any single geopolitical bloc.



- Trade and investment flows are increasingly driven by geopolitical alignment rather than economic fundamentals. This creates new complexities for India, whose neighbourhood remains economically interconnected but geopolitically unpredictable. A secure neighbourhood is therefore fundamental to India's economic security, yet managing these shifts requires sustained engagement and trust-building.
- In this endeavour, India has been expanding its economic diplomacy in the region. Speakers noted that between 2020 and 2022, a major proportion of India's grants and its lines of credit were directed to South Asia and the Indo-Pacific, illustrating India's strategic commitment to strengthening regional resilience and countering external influence.
- The session also incorporated perspectives from key international partners, each offering a distinct but complementary view on economic security.

- Australia underscored the value of trust-based cooperation and highlighted the strong complementarities driving its expanding economic relationship with India, supported by their trade agreement.
- New Zealand stressed the importance of a stable, rules-based trading system, resilient supply chains, and investment in future-oriented sectors such as green energy, digital services, and advanced manufacturing.
- Angola contributed the viewpoint of a resource-dependent economy, emphasising the need for diversification, stronger human capital, and improved governance to achieve long-term competitiveness.
- Sri Lanka too added a regional dimension, noting that shifting political alignments can create instability, making a secure neighbourhood essential to India's broader economic security.
- The session then shifted to India's domestic structural challenges, where industry perspectives highlighted persistent issues such as supply-chain fragility, dependence on imported raw materials, and the limited scale of India's high-value export sectors. Recommendations included strengthening supply-chain management systems, reducing import barriers, expanding free trade agreements, and improving logistics networks to enhance competitiveness.
- The panel concluded that India's transition from crisis to competitiveness requires a holistic strategy, one that strengthens domestic capabilities, deepens trusted international partnerships, improves technological security, and enhances policy execution at both national and state levels. The session affirmed that reinforced economic security is a long-term national imperative requiring coordinated action across government, industry, and international partners.



Key Recommendations

- **Set Up a National Supply Chain Risk Monitoring Authority:** India should establish a dedicated authority to continuously track supply chain risks across critical sectors, such as, semiconductors, pharmaceuticals, and electronics. Use of integrated real-time data from ports, manufacturing hubs, and logistics networks would help anticipate disruptions early, recommend corrective measures, and strengthen resilience against external shocks and coercive pressures.
- **Launch a Strategic Tech Acquisition and Co-Development Fund:** A government-backed Strategic Tech Acquisition Fund could enhance access to emerging technologies by financing joint R&D, licensing, and co-development with partner countries like the US, Japan, the EU, and Australia. Prioritising semiconductors, defence electronics, and telecom sectors would enhance India's self-reliance in critical technologies.
- **Create a South Asia Stability and Infrastructure Facility:** India should formalise its regional support by creating a South Asia Stability and Infrastructure Facility, consolidating the nearly 70% of grant assistance and over half of credit lines already directed to the neighbourhood. This mechanism would strengthen stabilisation, infrastructure development, and resilience, thereby reducing geopolitical vulnerabilities and reinforcing India's role as a regional anchor.
- **Implement a Unified Investor Assurance and Accountability Framework:** A nationwide Investor Assurance Mechanism would harmonise state-level processes through time-bound approvals, transparent monitoring, and a single digital dashboard tracking incentives and compliance. This would address issues like administrative friction, enhance predictability, and strengthen investor confidence, thus enabling states to compete on performance while supporting national competitiveness and industrial growth.



Strategic Industrial and Technological Partnership: Russia-India Collaboration for the Future

Keynote Address

H E Mr Alexey Gruzdev
Deputy Minister of Industry and Trade Russian Federation

Ms Marina Epifantseva
Deputy Head
Investment Development Agency of the Republic of Tatarstan

Mr Alexey Kechko
Head of Representative Office in India
VEB RF

Panellists

Mr Andrey Anisimov
Deputy Managing Director
Sberbank India

Mr Sergey Krasilnikov
Vice President
Russian Union of Industrialists and Entrepreneurs

Mr Mamed Akhmedov
Head of Representative Office in India
Russian Export Center

Mr Victor Ivanovsky
Director of International Business Strategy
Positive Technologies

Mr Anton Bazulev
Vice President for International Cooperation
UC RUSAL

Moderated by

Ms Zlata Antusheva
Lead of GR & Finance Sector
Trade Representation of Russia in India

Key Highlights of the Discussion

- The panel began by highlighting the importance of the strategic partnership between Russia and India with the aim of creating a diversified cooperation and dialogue between the two countries. Speakers identified the future of the partnership in focusing on the trade of industrial goods and the development of innovations and breakthrough technologies together. Areas where India could contribute to Russia's development were identified as the development of a diversified energy sector and the implementation of technologies supporting the fields of health, agriculture and manufacturing.

- Importance was placed upon technological sufficiency and sovereignty, the idea that crucial technologies and operations should be created and maintained within the country.

However, speakers emphasised that this does not require isolation but rather, strategic partnership with friendly countries.

- This was followed by the signing of an MoU in the field of education by the Principal of Visakhapatnam Polytechnic College, Dr. Ratna Kumar and the Principal of Pervouralsky Metallurgical College, Ms. Olga Antipina to foster the development of human capital through professional education.
- Speakers identified a concern about the trade deficit in India, where India exports more goods than it imports from Russia.

They discussed the enthusiasm of Russian companies in buying from the Indian market and requested stronger cooperation from India. Solutions to the trade deficit included reducing the time taken for the processing of transactions from Russia to India, putting forth the goal of reducing transaction time to 10 minutes by the end of the year, with the aim of making it more efficient for Indian companies to work with Russia.

- Moreover, speakers discussed initiatives taken to finance trade flows and support Russian investments in India, as well as financing Indian exporters to increase their trade potential. The panel announced the creation of a business development team in India to help Russian companies find investments in India, connecting Indian suppliers to Russian buyers. Human capital mobility was identified as another solution, where the movement of skilled professionals from India could address the labour force shortage in Russia.



Key Recommendations

- Strengthen Bilateral Investment Frameworks:** Bilateral investment frameworks must be strengthened through the implementation of a treaty to promote and protect investments and through increasing Russian companies' awareness of India's investment potential.
- Advance the India-EAEU FTA:** This is an imperative to expand bilateral trade and investment flows. Enhancing dialogue between Indian companies and the EAEU will demonstrate the value of this FTA to governments.
- Reduce India's Trade Deficit:** India's trade deficit with Russia must be addressed through the reduction of transaction-processing time for cross-border payments. Promoting Indian exporters to Russian buyers and increasing trade cooperation in areas such as bauxite mining and exporting is vital.
- Increase Human Capital Mobility:** Encourage movement of Indian skilled professionals in the fields of IT, engineering and researchers to address Russia's skill shortages.
- Broaden Economic Engagement in Regions beyond Moscow:** This can be facilitated through improved connectivity between the countries through the development of direct flight routes and dedicated port infrastructure.





Country Session: Japan

Keynote Address

Mr T G Bharath

Hon'ble Minister of Industries & Commerce and Food Processing Government of Andhra Pradesh

Special Address

H E Mr Keiichi Ono

Hon'ble Ambassador of Japan to India

Panellists

Mr Akira Hanzawa

*President
The Japanese Chamber of Commerce and Industry Chennai (JCCIC)*

Mr Kaoru Shiraishi

*Director General
JETRO Chennai*

Mr Ravi Sanna Reddy

*Co-Founder & Managing Director
Sri City Ltd*

Dr Kentaro Nagane

*Chief Operational Excellence Officer and Head of Administration
Eisai Pharmaceuticals India Pvt. Ltd.*

Mr Ken Tamura

*Chief, JETRO Toyama
(Toyama Prefectural Government)*

Moderated by

Mr Dilip Sawhney

*Chairman, CII National Committee on Smart Manufacturing and Managing Director
Rockwell Automation India Private Limited*

Key Highlights of the Discussion

- The session commenced by launching a report entitled The Japan-India Economic Security Cooperation, released by CII working in collaboration with JETRO and JCCII. The report identifies priority sectors and explores opportunities, challenges, and policy pathways to strengthen India-Japan bilateral cooperation with a focus on supply chain resilience, critical technologies, skilled workforce exchange and sustainable development.
- The panel thereafter highlighted a shared commitment to deepening India-Japan collaboration across key sectors such as advanced manufacturing, green energy, digital innovation, semiconductors, healthcare and human resources development and called for industry leaders to take meaningful action and achieve these advancements.
- The panel also proposed the establishment of a core group within CII, functioning as a nodal agency that would serve as a bridge between government and industry, driving coordinated efforts of digital development in areas such as 5G, AI, robotics, open RAN and telecommunications. Such an initiative, modelled on the India-US ICET framework, could provide a structured platform for collaboration to accelerate innovation.
- Speakers suggested driving innovative growth by linking India's startup ecosystem with Japan's capital and digital expertise to boost job creation, economic growth and technological innovation. Skill collaborations involving MSMEs were seen as another beneficial focus for collaboration.
- Speakers identified key avenues through which Japanese contributions could help achieve the vision of Swarna Andhra @ 2047. These included advanced manufacturing and technology transfer for Industry 5.0, placing emphasis on human-machine collaborations. Japan's expertise in urban planning and disaster management could aid the development of smart, resilient cities in Andhra Pradesh.



Human capital development and mobility and cultural exchanges were seen as vital to bridging the partnership and innovating together.

- The panel identified concerns about the power-intensive nature of the aforementioned industries, stating that power management would be a valuable area for India-Japan collaboration. Opportunities for such collaboration were identified in the field of sustainable technologies, including green hydrogen, solar power, wind turbines for the generation of renewable energy.
- Speakers identified distinct advantages for Japanese companies looking to invest in AP, including transport connectivity through airports and ports, as well as accessibility to major cities in South India. Andhra Pradesh was described as a favourable environment for business because of its numerous SEZs and beneficial tax incentives. However, they



recommended that increased logistical and travel connectivity to markets in North India is pivotal, in addition to augmenting infrastructure facilities for Japanese individuals in Andhra Pradesh, including the creation of Japanese schools and restaurants.



Key Recommendations

- **Broaden Bilateral Engagements:** India and Japan should expand collaboration beyond government channels through the development of relationships between private companies, cultural exchanges and increasing communications between states or prefectures and governments. Cultural exchanges can deepen trust and support long-term cooperation.
- **Andhra Pradesh as a Hub:** Andhra Pradesh is a high potential hub for Japanese investment in sectors, such as, steel manufacturing, mineral resources, pharmaceuticals, and advanced materials. Existing Japanese pharmaceutical R&D and manufacturing facilities provide a strong base for expansion.
- **Nodal Agency for Advanced Technologies Promotion:** A CII-led nodal innovation agency should be created to coordinate India-Japan collaboration in advanced technologies. Modelled on the India-US ICET framework, this platform would help align government and industry efforts. It would accelerate joint work in areas like AI, 5G, robotics, open RAN, and telecommunications.
- **Build Stronger Links between India's Startup Ecosystem And Japan's Capital And Digital Expertise:** This can boost innovation and economic growth. Collaboration involving MSMEs can further expand skill development and knowledge transfer.
- **Promotion of Green Energy:** India and Japan should deepen cooperation in sustainable industrial development, especially in green hydrogen, solar, and wind energy. Power-intensive industries will benefit from these clean energy partnerships.



Saudi Arabia

Keynote Address

H E Khaled Alkhattaf

CEO

Saudi Investment Promotion Authority

Presentation by

Mr Ram Reddy Ojili

Managing Director & CEO
Kakinada SEZ Ltd

Mr Mazen Barnawi

Head GSCRI
Ministry of Investment
Saudi Arabia

Mr Turki Alrammah

Director Global and Local
Business Partnership
SDAIA

Mr Abdullah Al-Qahtani

CEO, Film Commission
Saudi Arabia

Moderated by

Mr Narayan Sethuramon

Co-Chairman
CII International Council and CII Trade Policy Council
and Managing Director, Sanmar Matrix Metals Ltd.

Key Highlights of the Discussion

- The session provided a comprehensive overview of Saudi Arabia’s rapid economic transformation under Vision 2030 and highlighted the priority sectors where India can invest and expand its business footprint, including renewable energy, green hydrogen, digital technologies, data centres, advanced manufacturing, mining, shipbuilding, EV and battery components, infrastructure development, logistics, and giga-project participation. Speakers emphasised the resilience and growing strategic significance of the India-Saudi partnership, with bilateral trade reaching approximately USD 42 billion last year.
- Two flagship platforms, Invest Saudi and the Global Supply Chain Resilience Initiative (GSCRI), were presented as central vehicles for facilitating global investment.
- Invest Saudi integrates the Vision 2030 opportunity landscape across 20+ sectors, with 50+ detailed opportunity cards hosted online. It supports investors throughout the lifecycle, which includes opportunity identification, HS/ISIC classification, business registration, licensing, site assessment, and post-investment assistance.
- The GSCRI aims to build end-to-end value chains by attracting global anchor firms. It supports feasibility studies, investor matchmaking, funding-gap identification, and customised incentive structures. Priority sectors include aerospace materials (titanium and aluminium), EV and battery components, advanced manufacturing, shipbuilding, and downstream metals processing. Industrial hubs such as Ras Al Khair were presented as integrated bases for mining, shipbuilding, and metallurgical industries, areas where Indian EPC companies, engineering service providers, and manufacturing firms can directly collaborate.
- Energy transition formed one of the strongest pillars of discussion. The Green Saudi and Green Middle East initiatives reflect the country’s commitment to large-scale climate action. Plans to scale renewable-energy capacity to 130 GW by 2030 were outlined, alongside operational green hydrogen and green ammonia projects developed with international partners. These initiatives position Saudi Arabia as a major clean-energy hub and open significant avenues for Indian companies in solar manufacturing, green-hydrogen technology, EPC services, and electrolyser production.



- A distinguishing feature of the session was the emphasis on practical investment facilitation through a structured “investor journey”. This includes matchmaking with Saudi partners, regulatory guidance, site selection, feasibility and financial-modelling support, and customised incentives for strategic projects.
- In conclusion, the session positioned Saudi Arabia as one of the world’s most rapidly transforming economies, offering extensive opportunities for Indian companies across

industrial value chains, renewable energy, digital infrastructure, logistics, advanced manufacturing, mining, ports, AI, and giga-project development.



Key Recommendations

- **Expand India-Saudi Co-Investment Models For Industrial And Energy Infrastructure:** India and Saudi Arabia can leverage Invest Saudi and GSCRI to create joint investment vehicles in clean energy, advanced manufacturing, logistics, and data infrastructure. Strong collaboration opportunities exist in green hydrogen and ammonia, EV components, mining value chains, and data centres, combining Saudi capital scale with Indian execution and manufacturing depth.
- **Accelerate Bilateral Supply Chain and Logistics Integration:** Both countries should strengthen multimodal trade connectivity through SEZ-to-SEZ linkages, including collaboration with Kakinada Gateway Port in Andhra Pradesh. Dedicated logistics corridors, harmonised customs processes, and digital trade facilitation offer scope for collaboration in reducing costs, improving reliability, and enabling faster movement of intermediate goods and industrial inputs.
- **Deepen Technology, Digital and AI Collaboration:** India and Saudi Arabia should jointly develop AI governance frameworks, cybersecurity partnerships, and collaborative R&D programmes. Establishing India-Saudi innovation hubs offers scope for cooperation in software development, digital infrastructure, data analytics, and startup ecosystems, supporting joint innovation, technology transfer, and digital skill development at scale.
- **Expand Talent Mobility and Workforce Training Programmes:** Bilateral training platforms should be created to align skills with giga-project needs in construction, renewable energy, electronics, and advanced manufacturing. Collaboration opportunities include joint certification systems, technical training institutes, digital learning platforms, and workforce mobility frameworks that ensure a ready, skilled talent pipeline to support industrial scaling.



Singapore and Andhra Pradesh: Navigating Today's Challenges, Unlocking Tomorrow's Opportunities

Speakers

Ms Audrey Tan

Director of South Asia
Enterprise Singapore

Mr Murali Krishna Gannamani

Chairman, CII Andhra Pradesh
State Council and Founder &
Chief Executive Officer, Fluentgrid Ltd

Mr Vira Chand

Managing Director
Bothra Group

Mr Kiwi Nittala Philips

Regional Director
Meinhardt Group

Mr Jagadeesan S

AGM Transworld Global Logistics
Solutions (India)

Moderated by

Mr Francis Chong

Senior Director of South Asia, Middle East and Africa
Ministry of Trade & Industry

Key Highlights of the Discussion

- The discussion highlighted the long-standing and steadily evolving partnership between Singapore and Andhra Pradesh, built on complementary strengths in governance, enterprise development, technology adoption and industrial capability.

The panel noted that Singapore's global connectivity, financial depth and expertise in urban systems align naturally with Andhra Pradesh's growing industrial base, large talent pool and focus on transparent, technology-led development.

The session underscored that this relationship is not emerging from a new starting point but from a decade of trust, shared investments and earlier collaboration across infrastructure, skills and economic planning.

- The panel threw light on how both sides bring complementary capabilities to sectors that require precision, scale and future readiness. Singapore's strengths in airport planning, data centre engineering, infrastructure design and integrated utilities were seen as valuable for Andhra Pradesh's upcoming projects. At the same time, the state offers cost-effective engineering capacity, a large technically trained workforce and opportunities to design new systems suited for larger markets. Companies working across both regions described collaborations where Singapore's systems approach combined effectively with Andhra Pradesh's scale-driven implementation.
- The logistics and maritime sector emerged as another area of strong alignment. With two major ports near Visakhapatnam and

rising cargo potential along the east coast, shipping firms viewed Andhra Pradesh as strategically important for future trade flows. Opportunities were highlighted in container freight operations, multimodal logistics parks and new warehousing capacity, especially if connectivity to inland production centres strengthens. Cold-chain development and agri-logistics were also seen as important avenues where both sides can create value, particularly in districts with significant cultivation potential.

- The discussion concluded with the view that cooperation between Singapore and Andhra Pradesh is well-positioned for expansion across high-impact sectors. As Andhra Pradesh scales up infrastructure and technology adoption, and Singapore contributes to system design, enterprise support and sustainable development, both sides have an opportunity to establish partnership models relevant to the wider Indo-Pacific region. The overall sentiment reflected confidence that immediate opportunities can be activated now, laying a strong foundation for deeper collaboration ahead.



Key Recommendations

- **Develop an Integrated East Coast Cargo Strategy:** Strengthen the connection between Visakhapatnam and Gangavaram ports and inland production centres by improving multimodal links, expanding ICD networks and diversifying cargo sources to support larger vessel operations.
- **Build District Level Agri-logistics Infrastructure:** Create modern cold chains, pack houses and warehousing clusters to reduce post-harvest loss and ensure export grade quality, particularly for markets with high traceability standards.
- **Align Skills With High Growth Sectors:** Introduce specialised training pathways in maritime technology, renewable energy, data centres and AI enabled engineering through industry led programmes and certification systems.
- **Establish Joint Platforms for Infrastructure and Engineering:** Combine Singapore's system design expertise with Andhra Pradesh's execution capacity through structured planning mechanisms for airports, utilities and large engineering projects.
- **Ensure Multi-year Regulatory Predictability:** Adopt long range regulatory roadmaps and consistent approval frameworks to strengthen investment confidence, particularly for capital intensive projects requiring stable governance.
- **Create an Andhra Singapore Enterprise Acceleration Forum:** Institutionalise a collaboration platform to support joint ventures, technology partnerships and investment facilitation that can convert complementarities into tangible outcomes.

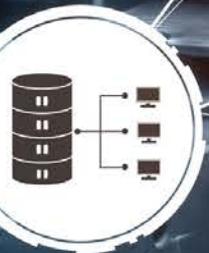


Track II – Future of Industrialisation

The emergence of Industry 5.0, which centers around the incorporation of advanced technologies like automation and artificial intelligence to improve productivity, has significantly accelerated global economic progress. To capitalize on this technology led economic transition, governments are implementing industrial reforms while private sector firms are simultaneously investing in developing these emerging and advanced technologies.

Therefore, to better position national economies in the Industry 5.0 era, the private and public sector of countries like India must work in tandem to cultivate a congruent environment for these Industry 5.0 technologies. At the same time, Industry 5.0 will disrupt global labour markets in the age of automation, which may lead to displacement and eventual need for reskilling in the global labour force.

Finally, to better increase the growth of regional and multilateral industrial connectivity, global and sub-national industrial corridors could be developed to improve efficiency in Industry 5.0 and better connect partners.





Next-Gen Industrial Corridors 2.0: Building Smart, Connected Ecosystem for Industry 5.0

Speakers

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Government of Andhra Pradesh

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Dr Cristiano Pasini

Director & UNIDO Representative
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Founder and CEO, EverestLabs.AI
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Mr Amlan Bora

Chief Representative
South Asia, Port of Rotterdam
Authority in India

Mr Alok Kirloskar

Managing Director
Kirloskar Brothers International BV

Moderated by

Mr Nishant Arya

Co-Chairman
CII Europe Council and Vice Chairman
and Managing Director, JBM Group

Key Highlights of the Discussion

- The panel discussed the fast-evolving nature of Indian industrial corridors and placed importance upon the development of digital-physical networks that integrate production hubs, ports and innovation centres with cutting-edge technologies. AI-optimised manufacturing networks were highlighted, emphasising their capacity of estimating effectiveness of industrial corridors and using predictive analytics to define their dynamic capacity.
- Circularity was identified as a top priority, with speakers drawing attention to the development of self-sufficient industrial parks, microgrids powered by renewable energy and energy-storage technologies. Sustainable manufacturing was predicted to make key contributions to India's Net-Zero target by 2070. Exploring new avenues of alternative energy and fuel sources to support industrial corridors was seen as vital, with speakers calling for international collaboration to tackle this issue.
- The panel discussed connectivity as a key focus, drawing attention to the importance of reducing logistics' costs. Ensuring cross-border flow of raw materials and finished goods was seen as important to building scale and cementing India's position as a global manufacturing hub.
- To achieve the goals of Industry 5.0, improvement of digital infrastructure, such as, implementation of optic fibre cables was seen as necessary. Speakers called for the cooperation of companies and governments in creating a smart, connected ecosystem for Industry 5.0. It was emphasised that such an ecosystem should be well-connected, collaborative and inclusive to MSMEs.
- Speakers drew attention to the potential of a collaboration between India and Egypt in the field of industrial corridors and logistics. Digital transformation, sustainability and human-machine collaboration were identified as key areas wherein cooperation between the two countries could help Egypt realise the goals of Industry 5.0 faster and more efficiently.
- The panel also discussed the usage of industrial AI to enable manufacturing, recycling and modernisation of waste management systems. AI applications in the area of waste-management were shown to have applications in manufacturing as well. Speakers discussed how AI automation in categorising and sorting waste could help recover metals, plastics, fibre and packaging materials which can be recycled and reused in the manufacturing space.
- Applications of AI in improving efficiency through inventory management and supporting intelligent systems through automated picking systems and warehousing were also discussed. The implementation of such technologies allows for distributors to set up base more easily and attracts foreign investment. Speakers also drew attention to the opportunities these technologies offered to MSMEs looking to set up manufacturing facilities.



Key Recommendations

- **Integrating smart logistics systems, digital-physical networks and data-driven governance** across India's industrial corridors can enhance efficiency and global competitiveness.
 - **International collaboration is essential for the development of industrial smart cities and strengthening corridor infrastructure.** Leveraging international partnerships will accelerate global progress towards Industry 5.0.
 - **Circular development is a key focus and the development of self-sufficient industrial parks, microgrids, and renewable-energy systems will help India achieve Net-Zero goals.** Exploring alternative energy sources through international collaborations is vital.
- Sustainability considerations must be integrated at the outset of industrial projects.
- **MSMEs must receive support in participating in advanced industrial ecosystems.** Creating inclusive technology platforms will prevent MSMEs from getting left behind in the shift to Industry 5.0.
 - **Industrial AI can increase the efficiency and competitiveness of industrial networks:** AI has important applications in waste management and recycling. AI can also be used for inventory management and automated warehousing, proving beneficial for MSMEs looking to set up manufacturing facilities.





India as a Global Advanced Manufacturing Hub

Special Address

Mr T G Bharath

Hon'ble Minister for Industries and Commerce and Food Processing Government of Andhra Pradesh

H. E. Mr Esau Garza de Vaga

Minister of Economy of the State of Aguascalientes Mexico

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Chair, Public Sector Structured Finance Department Asia-Pacific, Sumitomo-Mitsui Banking Corporation, Singapore

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Managing Partner NICCT & ACG International Netherlands

Mr Håkan Kingstedt

Senior Advisor Monemus AB & KIGO Consultants Sweden

Mr D V Giri

Board of Directors & President – Corporate Affairs, Axis Energy Ventures India Pvt. Ltd, India

Moderated by

Mr Dilip Sawhney

Chairman, CII National Committee on Smart Manufacturing and Managing Director Rockwell Automation India Private Limited

Key Highlights of the Discussion

- India stands at a decisive turning point in its manufacturing journey. With rapid technological advances and a renewed focus on competitiveness, India has the opportunity to transition from a cost-efficient producer to a global leader in capability, resilience, innovation, and sustainability. Manufacturing growth is indeed fundamental to India realising its vision of Viksit Bharat @ 2047.
- Achieving this vision will require sustained manufacturing competitiveness, robust supply chains, global-scale brands, and active participation from states, with Andhra Pradesh highlighted as a strong example.
- Emerging technologies—including AI, IoT, robotics, machine vision, smart sensors, blockchain, and advanced analytics—were recognised as central to India’s manufacturing transformation. These technologies are already driving impact across sectors such as oil & gas, electronics, and textiles by improving efficiency, decision-making, quality, and sustainability.
- Global partnerships are pivotal to India’s manufacturing renaissance. It was stated that there is growing strategic alignment between India and Mexico, emphasising a shared commitment to Industry 5.0. With both nations scaling capabilities in semiconductors, digital devices, embedded systems, and smart technologies, there is an opportunity establish a bilateral semiconductor and advanced manufacturing corridor.
- Several areas for **India–Mexico collaboration** were proposed:
 - ✓ Joint design and testing programs between universities and industry
 - ✓ Shared semiconductor ATP infrastructure and pilot lines
 - ✓ Short-term talent exchanges with micro-credential recognition
 - ✓ Fast-track engineering visas for movement of skilled professionals
 - ✓ Joint centres for functional safety, cybersecurity, and international standards.
- India and the Netherlands were identified as deeply complementary partners in shaping a shared, future-ready skills ecosystem. India contributes scale, digital capability, and a vast engineering workforce; the Netherlands contributes strengths in precision manufacturing, standards, vocational excellence, and internationally trusted certification frameworks.
- The panel observed that global value chains require global skills pipelines. Key recommendations included anticipatory skilling for emerging technologies, micro-credentials recognised across borders, mutual recognition of prior learning, industry-led training ecosystems, cross-border apprenticeships, short-term project mobility, and portable “skill passports.”

- In the solar sector, India has significantly reduced its dependence on imports. The country now has a strong base of cell and module manufacturers, and Andhra Pradesh is expected to host a major 10 GW minerals-to-modules integrated solar manufacturing facility. Additionally, a 3.5 GW solar park is set to be established to address project delays linked to land acquisition and infrastructure readiness.
- Renewable manufacturing is expanding into next-generation segments such as Battery Energy Storage Systems (BESS), which will enable firm and dispatchable renewable power. Wind and solar—once viewed as competing technologies—are increasingly being deployed as hybrid systems with storage, transforming



intermittent sources into reliable round-the-clock power plants. Offshore wind, though currently slow, remains a promising frontier.



Key Recommendations

- **Strengthen State-Level Manufacturing Ecosystems:** Scale and strengthen industrial parks, strengthen last-mile connectivity and expand renewable-powered manufacturing zones to support rapid industrial deployment.
- **Accelerate India and Mexico Manufacturing Corridors:** Develop shared semiconductor infrastructure, co-innovation centres and structured mobility pathways that integrate India into high value global supply chains.
- **Increase Research Intensity And Technology Adoption:** Strengthen research funding for automation, materials, clean energy and cyber physical systems, while enabling MSMEs to adopt Industry 5.0 technologies at scale.
- **Expand Renewable Energy Manufacturing Capacity:** Support minerals to modules solar production, hybrid renewable systems, offshore wind readiness and large-scale storage manufacturing to underpin clean industrial growth.



Track III - Sustainability and Climate Action

The emergence of Industry 5.0, which centers around the incorporation of advanced technologies like automation and artificial intelligence to improve productivity, has significantly accelerated global economic progress. To capitalize on this technology led economic transition, governments are implementing industrial reforms while private sector firms are simultaneously investing in developing these emerging and advanced technologies.

Therefore, to better position national economies in the Industry 5.0 era, the private and public sector of countries like India must work in tandem to cultivate a congruent environment for these Industry 5.0 technologies. At the same time, Industry 5.0 will disrupt global labour markets in the age of automation, which may lead to displacement and eventual need for reskilling in the global labour force.

Finally, to better increase the growth of regional and multilateral industrial connectivity, global and sub-national industrial corridors could be developed to improve efficiency in Industry 5.0 and better connect partners.



Andhra Pradesh - Green Hydrogen Valley of the Country

Session Chairman

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Hon'ble Minister of Energy
Government of Andhra Pradesh

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Chief Technical Officer
AM Green

Panellists

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Chief Secretary
Government of Andhra Pradesh

Dr V. K. Saraswat

Member, NITI Aayog

Dr M Kamalakar Babu

MD
NREDCAP

R Chintan Shah

Founder, SustCred

Moderated by

Prof D Narayana Rao

Executive Director
SRM Group

Key Highlights of the Discussion

- The session offered a comprehensive and forward-looking exploration of how Andhra Pradesh is positioning itself as a major pillar in India's clean-energy transition. What emerged through the panel was a clear and logical movement, from national-level ambition to state-level policy translation, to on-ground projects, technology pathways, and investor engagement. The discussion brought together stakeholders to collectively map out what is required to build a full, end-to-end green hydrogen ecosystem in Andhra Pradesh.
- The session began by grounding the discussion in India's National Green Hydrogen Mission (NGHM), which is the

country's main policy framework for building a green hydrogen economy. The Mission aims to make India a global hub for producing green hydrogen and for manufacturing electrolyzers at scale. It highlights the importance of shifting to renewable-based hydrogen, especially for hard-to-abate sectors such as steel, fertilizers, and refineries.

- From this national backdrop, the session then explained how Andhra Pradesh has developed its own detailed roadmap for green hydrogen. The state has translated the NGHM into clear policies, especially through the Integrated Clean Energy Policy 2024 and the Amaravati Declaration. Together, these two documents outline a long-term vision to produce hydrogen along with building an entire ecosystem that includes manufacturing, storage, transportation infrastructure, R&D, skills training, startup support and export systems.
- The session highlighted large early-stage projects that signal strong industry confidence in Andhra Pradesh's hydrogen vision. A 20-MW electrolyser system is expected to be operational by early 2026, producing green hydrogen daily from a major coastal hub. Plans are in place to scale this toward 1 million tonnes of green ammonia annually by 2028.

- Policy support was presented as a major strength of Andhra Pradesh's strategy. The state offers capital subsidies, SGST reimbursements, electricity duty exemptions, transmission charge waivers, and support for desalination plants and hydrogen refuelling infrastructure.

These incentives are designed to reduce risks for companies and encourage both domestic and global investors to participate.

- Finally, the session discussed the key challenges ahead. The two biggest hurdles are reducing the cost of electrolyzers and ensuring access to very low-cost renewable energy. Without progress in these areas, green hydrogen cannot compete with conventional energy sources. The panel stressed the importance of local manufacturing, R&D in technologies like biomass-to-hydrogen and advanced desalination, and innovation in storage materials such as metal-organic frameworks.
- Overall, the session showed that Andhra Pradesh is moving quickly and decisively to build a full green hydrogen ecosystem. Supported by national policy, strong incentives, early industry investments, and a clear technology roadmap, the state is positioning itself as a national leader in India's green hydrogen future.

Key Recommendations

- **Accelerate Development of Visakhapatnam-Kakinada-Krishnapatnam Hydrogen Corridor:** Prioritise integrated port-to-production-to-export infrastructure, including pipeline connectivity, storage terminals, ammonia cracking facilities, and bunkering systems, enabling Andhra Pradesh to serve as a leading export gateway.
- **Strengthen Electrolyser and Component Manufacturing:** Create dedicated production clusters with common facilities, testing labs, and international partnerships to reduce costs and achieve localisation targets, building competitive domestic supply chains.
- **Expand R&D and Technology Collaboration Platforms:** Fast-track partnerships with global research institutes for desalination, biomass-to-hydrogen, advanced materials, and storage technologies; fund demonstration plants through PPP structures.
- **Build Workforce and Entrepreneurial Ecosystems:** Develop large-scale talent programmes and startup accelerators focused on hydrogen operations, safety, logistics, and digital systems to ensure workforce readiness and innovation-driven growth.



Climate Risks for Indian Businesses

Session Chair

Dr Venkata Ramana

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Avera

Panellists

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Mr Sunil Nambiar

Head of Operations for Strategy
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Mr Sachin Gupta

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Dr Julie Reviere

Country Director
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Key Highlights of the Discussion

- Global research indicates that climate-related economic losses are doubling almost every decade, making resilience not just an environmental need but a strategic business imperative. Every rupee invested in resilience yields four times the return, underscoring the urgent financial rationale for proactive adaptation.
- Indian farmers remain at the frontline of climate impacts, with increasing crop failures, water stress, and extreme-weather exposure. Their vulnerability represents both a humanitarian concern and a macroeconomic risk, given agriculture's central role in national food security and rural employment.

- Climate adaptation requires ecosystem-wide transformation, including drought-resistant seeds, diversified cropping, digital irrigation tools, and improved soil management. Traditional agriculture patterns are no longer viable under current climate trajectories.
- Global investors now treat sustainability as a central investment criterion, not a voluntary add-on. Companies that fail to demonstrate credible ESG performance risk higher capital costs, reduced global market access, and reputational damage.
- India is well positioned to attract global climate capital due to its evolving regulatory frameworks, strong digital infrastructure, and increasing alignment with international ESG norms. Investors are now actively evaluating companies' carbon footprint, resource efficiency, and governance quality before deploying funds.
- Digitisation is a key enabler of sustainability, with real-time monitoring of emissions, warehouse temperatures, energy consumption, and fleet performance becoming standard practice. Data-driven decision-making is helping companies reduce waste and strengthen operational efficiency.
- Sustainability reporting and transparency are emerging business norms, even for privately held organisations. Companies are increasingly adopting global frameworks to gain investor confidence and meet international compliance requirements.
- The session underscored the interdependence between climate action and economic competitiveness. Businesses that adopt clean technologies, renewable energy, and low-carbon models are better positioned to meet global buyer expectations and participate in climate-conscious supply chains.
- Diversification of the agriculture economy is essential, as overdependence on water-intensive crops and legacy practices increases climate exposure. Building climate-smart agricultural markets and value chains is key to long-term resilience.
- Community-level climate literacy and behavioural change were emphasised as foundational, particularly around water management, sustainable irrigation, and crop transition. Many farmers are willing to adopt new technologies but lack guidance and institutional support.
- The importance of public-private-community partnerships was repeatedly highlighted. Effective climate adaptation requires collaboration between government agencies, industry bodies like CII, development organisations, and grassroots institutions such as SHGs and cooperatives.
- The overarching message of the session was clear: climate resilience is no longer optional. It is a fundamental pillar for protecting India's economy, securing its workforce, and positioning Indian businesses to thrive in a climate-constrained global marketplace.



Key Recommendations

- Embed Climate Resilience into Economic and Business Strategy:** Climate resilience must be treated as core economic infrastructure rather than an environmental add-on. Adaptation measures should be integrated into industrial policy, financial planning, supply-chain design, and location decisions to reduce systemic risk and protect long-term economic competitiveness.
- Transform Agriculture Through Climate-Smart Systems And Risk Protection:** Scale climate-smart agriculture by promoting drought-resistant crops, diversified farming systems, digital irrigation, and regenerative soil practices. These transitions must be supported by inclusive insurance mechanisms, including parametric and micro-insurance, to safeguard farmer incomes and national food security.
- Build Low-Carbon, Digitally Enabled, Resilient Supply Chains:** Support investments in solarised facilities, electric fleets, energy-efficient logistics, and digital monitoring systems. Real-time data on emissions, energy use, and operations enables transparency, reduces waste, boosts efficiency, and strengthens supply-chain resilience.
- Align Capital, Infrastructure, And Institutions For Resilience:** Strengthen ESG reporting and disclosure frameworks to unlock climate-aligned finance. Integrate resilience into infrastructure and regional planning, invest in climate literacy, and deepen public-private-community collaboration to deliver scalable, inclusive, and long-term adaptation solutions.





Financing the Blue Frontier: Science, Sustainability, and Investment Readiness

Special Remarks

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Special Chief Secretary
Infrastructure and Investments
Government of Andhra Pradesh

Ms Revathi Rohini Buragadda

Executive Director
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Moderated by

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Speakers

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Adviser, Ministry of Earth Sciences
Government of India

Mr Kartikeya Anand

Senior Advisor
Alternative Energy Company

Mr P Lakshmana Rao

Joint Director, Animal Husbandry
Dairy Development &
Fisheries Department, AP

Key Highlights of the Discussion

- The deliberations began with positioning the blue economy of India as a key driver for growth, drawing attention to sectors that have not yet been tapped to their full potential, such as, marine offshore energy, deep-sea mineral exploration and marine biotechnology, encouraging their development through science, technology and innovation.
- Speakers discussed further development of fisheries, raising concerns about the adequacy of deep-sea fishing fleets. The panel highlighted Andhra Pradesh's potential to become one of the leading states in seafood export, a goal which can be realised through development of deep-sea fishing fleets. Speakers called for private companies' investments in the blue economy to construct modern, upgraded deep-sea fishing vessels.
- The field of aquaculture was identified as a priority, with speakers drawing attention to opportunities for investing in broodstock multiplication and development. Introducing AI and IoTs for health management, stock assessment and growth monitoring through cameras and sensors was seen as imperative. The use of AI in disease management through geotagging to create backward traceability was also discussed as an important application.
- The panel drew attention to initiatives taken to seize opportunities provided by AP's extensive coastline, including the construction of three new greenfield ports from government investment and one from private investment, working towards the goal of having 10 operational ports in the state by 2026.
- Speakers highlighted AP's potential to become a renewable energy capital of India by taking advantage of offshore renewable energy sources, including solar, wind, tide and wave energy. The development of an integrated renewable energy project in the Andaman region was discussed, with speakers expressing the potential of undertaking a similar initiative in AP.

Technology and policy support were seen as key tenets for driving investment in the renewable energy sector. Government support in R&D of such technologies was also seen as essential.

- Coastal tourism was also discussed as a focus for development, due to the economic growth and employment opportunities it would create.
- The session concluded with the release of two publications, respectively entitled Compendium on Accelerating Progress in Aspirational Districts and Assessing the Impact of ESG Standards: Alignment on Sustainable Finance



Key Takeaways

- **Stable Policy Regime a Must:** The introduction of long-term stable policies is important to provide incentives for investors and startups in blue-economy sectors. Existing schemes must be expanded to encourage marine technology and aquaculture startups.
- **Develop Coastal Tourism:** Coastal tourism will bring in revenues for the state and create opportunities for employment.
- **Upgrade Deep-Sea Fishing Fleets And Vessels:** This may be achieved through public-private partnerships. Welfare schemes for small-scale fishermen must be enhanced.
- **Leverage AI & IoT:** Use AI and IoT for stock assessment, disease tracking and health management. These innovations will boost productivity and enhance global competitiveness.
- **Marine Research and Biotechnology Innovation Must Be Expanded Through Increased Funding.** Schemes that support startups in these fields are necessary.
- **Promote Large-scale investments in Offshore Wind, Tidal, Wave, And Solar Energy:** Encourage integrated renewable energy models for developing renewable energy along AP's coastline.





Sustainable Cities: From Vision to Investments

Speakers

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Deputy Secretary-General
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Mr Anand Iyer

Chief Policy & Insights
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Mr K S Venkatgiri

Executive Director
CII Green Business Centre

Session Chair

Mr Ponguru Narayana

Hon'ble Minister of Municipal Administration and
Urban Development & Urban Housing
Government of Andhra Pradesh

Moderated by

Mr Mohammad Athar Saif

Partner Leader
Infrastructure Advisory
PwC

Key Highlights of the Discussion

- The discussion examined how the city of Amaravati is being positioned as one of India's most ambitious greenfield capital cities, built on a foundation of long-term sustainability, strong urban planning and a commitment to people-centric development. They noted that the project is shaped by the unique contribution of thousands of farmers who voluntarily participated in the land pooling programme, which has allowed the city to begin with a scale and planning continuity rarely seen in India.
- The vision presented for Amaravati includes a capital that is environmentally responsible, economically vibrant and equipped with modern infrastructure designed to support a growing population and expanding regional economy.
- Sustainability featured prominently in the city's design philosophy. The panel outlined how Amaravati incorporates a water-centric urban model with inland canals, ecological corridors, blue-green networks and extensive green buffers functioning as natural cooling systems.
- Dedicated cycling and pedestrian infrastructure covering thousands of kilometres is meant to reduce dependence on motorised transport and support healthier urban living. These elements, combined with the city's adherence to the 5-10-15 planning framework, ensure that essential services, workplaces and public amenities are accessible within short travel times, reducing congestion and supporting a more inclusive urban environment.
- Digital infrastructure was presented as another core pillar for future-ready governance. Plans include the use of IoT systems, 5G networks, cloud computing and a full-scale digital twin of the city to support real-time data-driven decision-making. This framework aims to improve the management of waste, water, mobility and energy while creating the transparency required for long-term planning.
- Climate resilience emerged as a critical theme. Panellists referenced detailed assessments of carbon emissions, heat exposure, flood vulnerability and long-term climate risks for Amaravati.



- Green finance was identified as an important opportunity for accelerating development. The panel suggested that Amaravati could consider a state-level financing vehicle capable of pooling assets, obtaining favourable credit ratings and accessing both domestic and global investors.
- The session concluded by outlining how public-private partnerships and joint ventures will be central to building Amaravati at scale. While initial funding has come from major multilateral and domestic institutions, the majority of long-term investment is expected to be mobilised from private entities. The city's digital twin, robust datasets and

transparent governance are intended to help design bankable projects and reduce investor risk.



Key Recommendations

- **Translate the Climate Action Plan into Neighbourhood-Level Projects:** Identify priority actions for each ward and develop targeted solutions that directly address local heat, flood and emissions challenges.
- **Build a Dedicated Green Finance Platform for Amaravati:** Establish a state-level financing vehicle that can pool Amaravati's urban assets, strengthen creditworthiness and unlock access to green bonds, blended finance and international climate investment.
- **Scale Digital Governance And Real-Time Urban Management Tools:** Expand the use of the digital twin, IoT networks and integrated data platforms to support planning, asset management, PPP design, risk mapping and transparent decision-making.
- **Strengthen Blue-Green Infrastructure and Sustainable Mobility Systems:** Accelerate the implementation of cycling corridors, pedestrian networks, ecological buffers, inland canals and open green spaces so that sustainability informs daily mobility, heat reduction and ecological resilience.

Track IV - Technology and Innovation

Innovative technologies like India's Digital Public Infrastructure (DPI) are rapidly transforming financial accessibility and settlements within and between nation-states. India has become a global leader in DPI through the India Stack, an open Application Programming Interface (API), through frugally investing in inclusive platforms like the Unified Payments Interface (UPI). India could leverage its strength in DPI through expanding UPI to significant bilateral trading partners to increase cohesion in the global economy and increase permeance of financial technologies in the future global financial ecosystem.

Moreover, to compete globally in advanced and frontier technologies, India and its partners must invest significantly in enhancing capacity for research and development (R&D) initiatives to compete in global growth sectors like artificial intelligence and automation.





Transforming Ideas into Global Impact: Accelerating Inclusive and Sustainable Innovation

Speakers

Mr Nara Lokesh

Hon'ble Minister for Human Resources Development; IT Electronics & Communication; RTG Government of Andhra Pradesh

H E Khaled Alkhattaf

CEO Saudi Investment Promotion Authority

Dr Mohan Kankanhalli

Deputy Executive Chair AI Singapore; Director, NUS AI Institute; Provost's Chair Professor of Computer Science National University of Singapore

Dr Pranita Upadhyaya

Head of the ITU Area Office and Innovation Centre for South Asia International Telecommunication Union (ITU), India

Mr Gregory C Allen

Senior Adviser Wadhvani AI Center Center for Strategic and International Studies (CSIS) United States of America

Mr Murali Krishna Gannamani

Chairman CII Andhra Pradesh and Founder & CEO, Fluentgrid Ltd

Key Highlights of the Discussion

- The discussion focused on how innovation is now central to economic and social progress, and not just an advantage reserved for advanced economies. The panel noted that countries working to strengthen healthcare, climate responses, education, entrepreneurship, governance and digital public services increasingly require innovation systems that link research, industry and implementation.
- India was highlighted as being at an important point in this journey, supported by new policy measures designed to connect scientific capability with market-ready outcomes and community-level impact.

The view shared was that India has the scale, digital foundation and talent base to shape solutions that extend beyond its borders, especially for fast-growing and developing regions.

- Countries are making strategic choices around policy, investment, talent and trust to build ecosystems capable of using AI and other emerging technologies responsibly. The example of Saudi Arabia illustrated how long-term national planning, institutional alignment and investment linked to a clear transformation agenda can accelerate digital progress and support new growth sectors.
- Another key theme was the growing democratisation of advanced technology. The comparison between the earlier space era and today demonstrated how capabilities once limited to major governments are now available to start-ups, universities and even student-led projects, thanks to declining entry barriers and more affordable access.
- A similar pattern was seen in the rapid global adoption of generative AI tools, which

moved from introduction to mass usage within months. Speakers, however, cautioned that the simplicity of using such tools often disguises the extremely high capital expenditure required for global infrastructure. This means that collaboration, partnerships and shared platforms will continue to be critical for widespread adoption, especially for countries that are still building foundational capabilities.

- The final part of the discussion stressed that meaningful progress will require inclusive participation, especially for populations still offline. Programmes focused on youth, gender inclusion, digital literacy, AI skill development, cybersecurity preparedness and regional cooperation were cited as essential elements of an equitable innovation agenda.
- The session concluded with the view that the most durable innovation outcomes will be built on collaboration, responsible adoption and sustained partnerships rather than short-term gains.



Key Recommendations

- **Strengthen National Innovation Pathways:** Create stronger linkages between research institutions, industry and public systems to ensure that scientific discoveries progress efficiently.
- **Support Innovation through Talent Development:** Expand programmes that prepare young researchers, women and underrepresented groups to participate in high value innovation activities.
- **Build Data and AI Readiness Models:** Develop energy resilient digital infrastructure, specialised talent pipelines and governance frameworks that enable responsible deployment of data driven technologies across sectors.
- **Expand Access to Advanced Technologies:** Advance initiatives that reduce barriers to adopting emerging technologies by using shared platforms, cross-border partnerships and accessible digital tools that support inclusive participation.





Open-Mic Session: Investor's Perspective on Growth, Opportunity and Enablement

Session Chair

Mr Nara Lokesh

Hon'ble Minister for
HRD, ITE&C, RTG
Government of Andhra Pradesh

Mr Pankaj Sharma

President and COO
Dixon Technologies

Panellists

Mr Jasbir S Gujral

MD
Syrra SGS Technologies Limited

Mr Ruven Shaibel

CEO
Neolync

Mr Venkata Sudhakar Simhadri

Founder & CEO
ASIP Technologies

Mr Deepak Deshmukh

Joint President and Head of Sales
Hindalco Industries Limited

Moderated by

Mr Bhaskar Katamneni

Secretary, IT
Electronics & Communications, RTG and HRD
Government of Andhra Pradesh

Key Highlights of the Discussion

- The session delivered a powerful, forward-looking narrative on how Andhra Pradesh is positioning itself as one of India's most dynamic and competitive destinations for electronics manufacturing. With global supply chains undergoing a

historic realignment in the post-pandemic era, the state presented a compelling case to investors that Andhra Pradesh is not only ready to participate in this shift but is determined to lead it.

- Through a combination of speed-driven governance, integrated cluster development, world-class logistics, and unmatched responsiveness to industry needs, the state showcased a model of industrial growth that aligns squarely with India's ambition to become a global electronics powerhouse.
- The panel reiterated that global electronics production is moving away from highly concentrated geographies, such as, Taiwan, China, Thailand, and Malaysia. India stands at the cusp of capturing a significant portion of this shift.
- Central to Andhra Pradesh's strategy is vertical and horizontal integration. Vertically, the goal is to locate every component of the electronics value chain, screens, casings, batteries, lenses and modules, within a 100-km radius, enabling just-in-time manufacturing, low inventory costs, and seamless supplier coordination.
- Horizontally, the state aims to interlink government, industry, universities, R&D institutions, and testing-certification facilities within the same ecosystem. Companies highlighted that sending products abroad for certification currently costs over USD 0.22 million; Andhra Pradesh plans to eliminate this barrier by establishing certification institutes directly inside its industrial clusters.
- The announcement of an escrow mechanism for incentive disbursement by the Hon'ble Chief Minister of Andhra Pradesh was widely welcomed as a significant reform that enhances investor confidence and mitigates risk.
- The semiconductor sector was also featured prominently in the discussion. A leading technologist announced that Visakhapatnam will host one of India's first semiconductor packaging units, placing the city in line with national semiconductor hubs such as Gujarat and Assam. A vision was also outlined for a semiconductor innovation centre in Visakhapatnam to promote fabless chip design startups, skill development for VLSI (Very Large Scale Integration) models, and deeper integration into global semiconductor value chains.
- The session concluded with the formal exchange of Government Orders and MoUs, marking a major milestone for the state. Andhra Pradesh announced a total of INR 279 billion in committed investments and approximately 54,000 new jobs across electronics, components manufacturing, semiconductors, and allied sectors. The session closed with a shared resolve from both government and industry stakeholders to strengthen Andhra Pradesh's positioning as a future-ready, globally competitive hub for advanced manufacturing.



Key Recommendations

- Build Fully Integrated Electronics Clusters:** Accelerate the development of end-to-end electronics clusters by closely locating component suppliers, certification laboratories, logistics platforms, and R&D centres within major industrial hubs. Establishing global-standard testing and certification facilities locally will cut product development timelines and remove dependence on costly international validation.
- Strengthen Talent Pipelines Through Academic-Industry collaboration:** Deepen university-industry partnerships to develop a future-ready workforce, with specialised programmes in chip packaging, embedded systems, PCB design, semiconductor technology, and robotics. Creating dedicated training and apprenticeship pathways will help bridge the skill gap and support advanced manufacturing expansion.
- Boost Investor Confidence And Attract Top Global Firms:** Institutionalising fast-track governance through defined approval timelines and expanded escrow-backed incentive mechanisms will reinforce trust and predictability for investors. Andhra Pradesh could also pursue strategic partnerships with technology leaders in Taiwan, Japan, Korea, and the U.S. to anchor semiconductor, display, and advanced component ecosystems, enabling deep supply-chain relocation into the state.





Andhra as a Strategic Hub for Defence Manufacturing, Aerospace, Space & Drones Ecosystem & Private Sector Participation to Pilot the Journey

Speakers

Mr T G Bharath

Hon'ble Minister of Industries & Commerce and & Food Processing Government of Andhra Pradesh

Mr G Satheesh Reddy

Chairman of Defence research and development organisation

Dr S Somanath

Advisor - Space ISRO

Dr (Smt) Chandrika Kaushik

Scientist 'H' & Outstanding Scientist DG (PC&SI), DRDO

Mr Nilaya Varma

Co-Founder & Group CEO Primus Partners Pvt Ltd

Mr Sampath Kumar

Executive President - Defence HFCL

Mr Anirudh Sharma

CEO Digantara (Start-Up)

Mr Jayaram Mummadi

CEO Kalyani Rafael Advanced Systems

Key Highlights of the Discussion

- The panel examined how Andhra Pradesh is shaping a focused pathway in defence, aerospace and space-oriented manufacturing, supported by specialised industrial zones and a policy environment

designed to help investors transition quickly from interest to implementation. Speakers noted that the state has identified multiple locations for sector-focused development, and

foundational activity has already begun through the presence of public-sector establishments, research-linked facilities and new private sector commitments.

- The session reflected growing confidence that these initiatives go beyond announcements and are progressing through coordinated planning between government, industry and scientific agencies.
- Industry representatives emphasised that the decision to locate their units in Andhra Pradesh was influenced not only by the policy incentives offered but also by the state's readiness to take swift administrative decisions, clarity in land allocation, and willingness to resolve matters without prolonged procedures.
- Several companies expressed interest in developing new-generation products rather than limiting their presence to assembly functions.

The potential for employment spans engineering, electronics, precision fabrication, material sciences, testing and logistics, while indirect employment is expected through ancillary units, industrial services and specialised technical support.

- Another key aspect discussed was the role of MSMEs and smaller technology firms. Investors stressed that defence and space manufacturing can grow meaningfully only

if supply chains are diversified and smaller units are able to access opportunities in production, machining, specialised components, software, repairs, maintenance and life-cycle support.

- Larger companies indicated an interest in working with co-located smaller enterprises to jointly build value rather than operating through isolated parent-unit models. This was positioned as an opportunity for new entrepreneurs to enter an organised ecosystem with predictable off-take opportunities, skill requirements and quality standards.
- Further viewpoints emphasised that long-term success in defence and space manufacturing will depend on continuous capability development supported by shared testing infrastructure, consistent policy execution and close alignment with global quality and safety standards. Speakers added that ecosystem maturity will progress in stages, moving in line with technological readiness, market expansion and regulatory evolution.
- The concluding view was that Andhra Pradesh is working to establish an environment where defence and space production can grow through sustained collaboration, research-led capacity building and predictable implementation, positioning the state to emerge as a credible contributor to future strategic manufacturing value chains.

Key Recommendations

- Strengthen Cluster Based Industrial Development:** Deepen the operational capacity of identified defence and aerospace clusters by ensuring integrated infrastructure, supplier co location, logistics access and support services.
- Promote High Technology Manufacturing Capability:** Enable firms producing propellants, electronic fuses, advanced ammunition and satellite hardware to scale through specialised land parcels, technical support and skilled workforce access.
- Accelerate Testing and Qualification Infrastructure:** Fast track the establishment of shared testing and certification centres in collaboration with national agencies to reduce entry barriers for defence and space firms.
- Strengthen Space Sector Readiness:** Develop policy and infrastructure mechanisms that support satellite manufacturing, space situational awareness, and future readiness for debris management and in orbit servicing.





India's Precision Medicine Leap - Harnessing AI and Genomics for Viksit Bharat

Special Remarks

Dr Tedros Adhanom Ghebreyesus

Director General
World Health Organization
(WHO) [Virtual]

Mr Gaurav Agarwal

Co-Chairman
CII National Medical Technology
Forum & Managing Director
Involution Healthcare Pvt Ltd

Mr Sudeep Dhariwal

Group Chief Financial Officer
Healthium Medtech Limited

Moderated by

Dr Rana Mehta

Senior Partner and
Healthcare Lead
PwC India

Panellists

Mr Saurabh Gaur

Secretary
Health Medical & Family Welfare
Government of Andhra Pradesh

Dr Villoo Morawala Patell

Founder & CMD
Avesthagen Limited

Mr Kinjal Saxena

Chief Technology Officer
AIG Hospitals

Mr Prashant Tandon

Co-Chairman, CII National
Committee on Health Technology
and Co-Founder &
Chief Executive Officer
Tata 1mg

Dr Raches Ella

Chief Development Officer
Bharat Biotech International
Limited

Key Highlights of the Discussion

- At the outset, the panel drew attention to key initiatives taken by the Government of Andhra Pradesh to solve health challenges. Project Sanjeevani, launched by the state government, was discussed as one such initiative, aimed at providing personalised healthcare solutions to the people of the state. This project focuses on the creation of electronic health records, stored on a digital platform for ease of access by healthcare professionals and by the patients themselves. The potential for expanding this initiative to include the development of wearable health-monitoring devices was also discussed.
- Speakers highlighted advancements made by India in the field of precision medicine, including molecular gene therapy for the treatment of cancer, autoimmune diseases and metabolic disorders. Regulatory agility was seen as essential for the accelerated development and de-risking of such pharmaceutical products. Increased funding to R&D efforts was also seen as imperative.
- The panel discussed the usage of medical devices for diagnostics, treatment and monitoring purposes within the field of precision medicine. Speakers called for Indian med-tech companies to form partnerships with the Indian government for the development of diagnostic platforms and medical delivery mechanisms. It was also seen as imperative that medical solutions should be indigenised and tailored specifically to

Indian consumers, since Western products are often not designed to account for genetic differences between Indians and Western consumers.

- The panel discussed the transformative shift brought forth by the advent of AI in the field of precision medicine. AI's potential in diagnostics, improving patient safety and remote robotics was highlighted.

It was emphasised that AI would not replace doctors but rather assist them in delivering the best possible care to patients. The panel also discussed the usage of AI for improving accessibility to high-end diagnostic solutions to rural populations.

- The panel addressed complications with the use of AI, regarding errors that could be made by the AI. Increased testing and training of the model were recommended, as well as focusing on implementing AI in screening and diagnostics first. The need to focus on IP protection for these AI solutions was also highlighted.



Key Takeaways

- **Enhance Regulatory Agility:** Regulatory agility must be increased to speed up approval and de-risk development of gene therapies and advanced pharmaceutical solutions. R&D funding for such solutions must be increased.
- **Promote Med-tech:** Partnerships between med-tech companies and the government should be encouraged, to develop indigenous medical devices for diagnostics and delivery. Medical devices must be tailored specifically to Indian genetic profiles, rather than relying on Western products.
- **Build Robust Predictive Healthcare Systems:** AI, IoT, and evolved data sciences can create predictive healthcare systems capable of identifying disease risks early. AI-assisted tools can enhance the skillsets of junior doctors and improve decision-making.
- **Adopted a Step-by-Step Approach to Use of AI:** AI must be integrated safely into screening, diagnostics and predictive analytics before expanding into treatment-related applications. Testing and training of AI models is important to minimise errors.
- **Reliable IP Protection Frameworks** for AI-driven medical technologies must be developed.





Innovation Amidst Global Shifts: Opportunities in Advanced Materials, Semiconductors and Critical Minerals

Speakers

H E Mr Héctor José Silva Hernández

Minister of People's Power for
Ecological Mining Development of
Venezuela

H E Mr António Grispos

Secretary of State for Trade
Mozambique

Dr Andy G Sellars

Strategic Development Director
CSA Catapult
United Kingdom

Dr Mohan Kankanhalli

Deputy Executive Chair, AI Singapore;
Director, NUS AI Institute;
Provost's Chair Professor of
Computer Science
National University of Singapore

Moderated by

Mr Rajiv Memani

President
Confederation of Indian Industry
(CII) India

Key Highlights of the Discussion

- The panel directed focus on how advanced materials, semiconductors and critical minerals are becoming central to global technology, economic security and industrial competitiveness. Speakers noted that the demand for these inputs is growing rapidly as artificial intelligence, electric mobility, aerospace, renewable energy and digital infrastructure expand worldwide.
- With semiconductor markets projected to scale significantly in the coming years, countries are now reconsidering how to secure access to materials, processing capabilities and talent. The need for trusted partnerships, resilient supply chains and new forms of research collaboration was highlighted as a key requirement in a period shaped by geopolitical and geoeconomic uncertainty.

- Countries with known reserves of gold, bauxite, coal and other critical minerals explained that investment partnerships, technology access and joint development models are central to their next phase of growth. Several speakers underlined that their national strategies now aim for diversification and economic transformation, supported by responsible investment frameworks and openness to collaboration with global partners.
- From a semiconductor perspective, the session highlighted how miniaturisation, cost of chip design and the complexity of global fabrication supply chains are creating new challenges. The rapid pace of advancement is increasing both capability and capital requirements, pushing countries to cooperate rather than pursue fully self-contained production ecosystems.
- New material classes such as compound semiconductors and photonics-based chips were described as emerging areas that could change performance thresholds in mobility, communication and quantum computing. Speakers noted that future competitiveness will depend not only on access to materials but also on specialised skills, research platforms and opportunities to test new technologies using pilot facilities before commercial scaling.



- Research directions were also discussed, where new computing architectures could be explored instead of relying solely on existing transformer-based models requiring high-end GPU capacity. The potential to rethink system design and explore non-traditional pathways was presented as an emerging innovation domain. Examples were shared of teams globally that have been able to advance their AI research through deep technical skills and creative engineering approaches rather than only depending on the newest hardware. This reinforced the argument that long-term capability is strengthened by fundamental knowledge, not only by access to advanced equipment.



- The session closed with the view that no single nation can independently manage the full spectrum of semiconductor, materials and mineral ecosystems. Future progress will rely on international cooperation, shared research platforms, transparent investment frameworks, responsible processing and talent development. Participants agreed that the evolving landscape presents both challenges and new openings for partnership-driven innovation, where material availability, technology, policy and skills align to create sustainable economic opportunity.



Key Recommendations

- **Strengthen Joint Research Platforms:** Develop shared research programmes for materials science, compound semiconductors and photonics to support experimentation, testing and early stage validation.
- **Support Value Addition in Mineral-Rich Economies:** Create investment and training partnerships that help countries refine and process minerals domestically and build integrated industrial capability.
- **Build Workforce Capacity Across the Value Chain:** Invest in training systems for scientists, engineers and technicians to strengthen capability across advanced materials, semiconductor design and mineral processing.
- **Develop Pilot Line Infrastructure:** Establish shared facilities that allow companies to test new materials and architectures before commercial scaling, reducing technological and financial risk.
- **Promote AI for Science and Domain Specific Innovation:** Encourage projects that use AI to accelerate materials discovery and adopt smaller models suited to environments with limited hardware.
- **Build International Supply Chain Partnerships:** Form structured agreements to support secure access to critical minerals, strengthen responsible processing and foster stable, long term industrial linkages.





From Disruption to Advantage: Leveraging Technology & Innovation for Cost-Efficient and Sustainable MSME Growth

Keynote Address

Mr Kondapalli Srinivas

Minister of MSME
Government of Andhra Pradesh

Mr Thomas John Muthoot

Chairman
CII Southern Region and
Chairman and Managing Director
Muthoot Fincorp Ltd.

Moderated by

Mr Sunil Chordia

Chairman, CII National MSME Council
and Chairman and Managing Director
Rajratan Global Wire Ltd

Panellists

Mr Prasad Maganti

Founder and CEO
Maganti IT, United States

Mr M Ponnuswami

Co-Chairman
CII National MSME
Council and CMD,
Pon Pure Chemical India Pvt Ltd.

Mr Philipp Assmus

CEO & Founder, FyrstGen
Switzerland

Mr Ameya Prabhu

Co-Chairman
CII International
Council and Managing Director
NAFA Capital Advisors

Key Highlights of the Discussion

- India's MSME sector, comprising over 70 million enterprises that contribute 30% to national GDP, 45% of India's total exports and 35% of manufacturing output, is in a transformative phase powered by new technologies and innovations. Today, as India becomes a key destination for establishing global capability centres (GCCs) in diverse sectors that include manufacturing, domestic MSMEs have the opportunity to integrate with this global capability network, and thereby operate at scale.
- In the emerging business scenario, leveraging new technologies and breaching new frontiers of innovation would be fundamental to Indian MSMEs collaborating and co-innovating with their global peers.
- To enable this shift in Andhra Pradesh, the Dx-Edge was launched at the Summit by CII, supported by NITI Frontier Tech Hub, All India Council for Technical Education (AICTE), and the Department of MSME, Government of Andhra Pradesh. DX-Edge is a national framework that empowers MSMEs to enter the digital fold with the support of technology providers, academic institutions and students. The platform helps:
 - Technology providers to scale their innovations, and expand their reach
 - Academia and students to link their classrooms to real industry challenges for building future-ready digital talent.
- Dx-Edge platform recognises the varying needs of MSMEs, while factoring in sector-specific tech requirements. Underscoring the importance of this tech transformation, the panel cited a national survey that shows nearly 70% of MSMEs in India recorded higher productivity and business efficiencies after adopting just the basic digital tools, UPI, smartphones, etc. However, less than 10% of MSMEs have started using AI or even experimenting with it. Against this backdrop, the panel said that embracing new technologies like AI will be key to MSMEs transforming from local champions to global value chain players.
- Access to digital finance and fintech solutions are also improving MSME financing of business. In this regard, it was pointed out that while in 2015 only 15% of ~63 million MSMEs operated in the formal segment with access to mainstream finance, by 2025, 48% of 70 million MSMEs have moved into the formal segment. Use of UPI platform is viewed as one key enabling factor for this transformation. Use of UPI has not only made information more readily available for credit sanction, but also the documentation can be done digitally. Hence, a greater number of MSMEs are becoming formal customers of banks and NBFCs. Moreover, with wider access to the Unified Lending Interface (ULI) platform, a greater percentage of MSMEs will likely come into the formal fold.

- Regarding market access, the panel highlighted the big opportunity for MSMEs to do business on the Open Network Digital Commerce (ONDC) platform, utilise the Government eMarketplace (GeM) to gain a sizeable share of business from government procurements, and explore for more procurement orders from public sector enterprises.
- From a trust perspective, it was stated that with blockchain and AI, it is possible to identify companies that adhere to transparency and focus on innovation. The session concluded on the note that MSME growth is central to India's realising its vision of Viksit Bharat@2047.

Key Recommendations

- **Accelerate Large-scale Digital Adoption Across MSMEs:** Implement phased digital readiness programmes and expand Dx-Edge participation to ensure every MSME can access appropriate technologies for productivity enhancement.
- **Strengthen Shared Infrastructure Through Cluster Development:** Scale common facility centres, sectoral MSME parks and country-specific parks to support innovation, reduce operational costs and improve access to advanced manufacturing tools.
- **Expand Financial Inclusion Through Digital Credit Pathways:** Leverage ULI, digital documentation and enhanced state credit guarantees to streamline MSME lending and reduce collateral burdens.
- **Support Technology-led Trust Building Within Supply Chains:** Encourage MSME adoption of traceability tools, modern machinery and quality certification systems that enhance credibility in domestic and global markets.





Biodesign: Designing for People and Nature

Speakers

Dr HC Anja Carron

President- Europe
INLAMOBIL Private Limited
France

Ms Megha Awasthy

Director and BioDesign Expert
Steelcase

Prof Srikar

Professor of Design
IIT Hyderabad

Mr Suresh Raju Penmetsa

Chief Risk Officer &
Sr. Vice President EHS &
Sustainability Mankind Pharma
Limited

Ms Mohini Mehta

Head of International Relations
and Lead Scientist D-Orgen Labs
AMTZ Andhra Pradesh

Mr Ameya Prabhu

Co-Chairman, CII International
Council and Managing Director
NAFA Capital Advisors

Moderated by

Dr (Ms) Suchitra K Ella

Vice President
Confederation of Indian Industry (CII)
and Managing Director
Bharat Biotech International Ltd

Key Highlights of the Discussion

- The panel discussed the topic of biodesign as a timely convergence of human-centred innovation with nature-inspired creativity and posed the question of whether it is possible to design for human progress while preserving planetary health. Maintaining the biodiversity and sustainability of the ecosystem one operates in, was seen as a key focus. Inclusion, sustainability and collaboration were identified as key tenets for progress in this field.
- The panel discussed the importance of connecting traditional, ancestral forms of knowledge with modern science in a public, private and people partnership in order to create adaptive and resilient industries, economies and communities. Speakers emphasised the importance of a shift in education to create a mindset that focuses on circular, regenerative approaches to innovation.
- They drew attention to the sustainability requirements of global companies, including traceability, ethical sourcing and carbon accountability and highlighted the necessity of utilising circular biodesign principles to meet these requirements. Some such principles discussed included synthesis of natural molecules for fragile plants, upcycling materials, building biodiversity and agroforestry.
- Green building concepts were discussed with a focus on rainwater preservation through rooftop collection systems and surface runoff harvesting. Implementing these solutions was said to be useful in reusing rainwater and building up the water table.
- Speakers highlighted the implementation of the circular economy when using renewable fuels, where the ash generated through burning renewable fuels was mixed with materials used to make bricks for expansion projects. Plastic neutrality through recycling plastic waste for use in packaging was also discussed.
- The panel discussed the importance of human-centric design, highlighting studies where bringing natural elements from the outdoors to the indoors was shown to reduce stress, improve well-being and increase productivity and creativity. Incorporating biophilic elements by rejuvenating parks, increasing urban greenery and improving green cover was seen as essential. Growth and innovation were said to be possible when human satisfaction and happiness is placed at the centre.
- Balancing urbanisation with a biodesign mindset was seen as imperative. The incorporation of evaporative cooling elements inspired by traditional Indian architecture in institutional buildings and airports was seen as an example of this. Speakers discussed various experiments and innovations currently taking place to fully harness the potential of mycelium and bamboo in product design. Additionally, speakers drew attention to the potential usage of chlorophyll in solar panels in urbanised areas.
- Biomimicry, the principle of studying models and elements of nature to solve complex human problems, was highlighted as a key area of focus for biodesign innovations.

Key Recommendations

- **Biodesign principles must be integrated across industries** in order to enable sustainable development. Human-centred circular design approaches must be embedded into product development and infrastructure planning.
- **Ancestral knowledge systems must be combined with modern biodesign principles** through collaboration between communities, researchers and industries. Building public-private-people partnerships will allow for developing adaptive and resilient economies and communities. A shift towards biodesign and sustainable thinking must be enabled through a shift in education.
- **Industries must adapt to meet global sustainability requirements on traceability, ethical sourcing and carbon accountability.** Adopting circular biodesign practices, such as, upcycling materials, synthesising natural molecules, promoting agroforestry, and enhancing biodiversity will be vital to achieving this goal.
- **Shift From Solvent-Based Capsule Materials To Safer Aqueous Alternatives:** Sustainable development in the pharmaceutical industry can be fostered through the shift from solvent-based capsule materials to safer aqueous alternatives. Moreover, sustainable packaging innovations through plant-derived materials can be adopted by companies.





RTIH and One Family One Entrepreneur- State's Innovative Way of Integrating Entrepreneurship, Innovation, Mentoring and Product Perfection

Keynote Address

Mr Nara Lokesh

*Hon'ble Minister for Human Resources
Development; IT Electronics &
Communication; RTG
Government of Andhra Pradesh*

Session Co-Chair

Mr Kondapalli Srinivas

*Hon'ble Minister of MSME, SERP
NRI Empowerment & Relations
Government of Andhra Pradesh*

Panellists

Mr Ravi Arora

*Senior Vice President
Group Innovation, Tata Sons*

Mr Rajesh Yabaji

*Co-Founder & CEO
BlackBuck*

Mr Sateesh Andra

*Co-founder & Managing Partner
Endiya Partners*

Prof Ramesh Loganathan

*Professor of Innovation & Outreach
IIIT Hyderabad*

Mr Madan Padaki

*Co-Founder, Global Alliance for
Mass Entrepreneurship (GAME)*

Moderated by

Ms P Dhatri Reddy

*CEO, RTIH & APIS
Government of Andhra Pradesh*

Key Highlights of the Discussion

- Entrepreneurship in Andhra Pradesh dates back to the times of the Satavahana Dynasty that ruled the region from 1st century BCE to 3rd century CE. Historical accounts suggest the Satavahanas conducted significant maritime and overland trade with Roman Empire, Arabia, and East Africa. The Andhra Pradesh political leadership draws inspiration from this rich economic legacy in designing bold steps to drive entrepreneurship and innovation in the state. The Ratan Tata Innovation Hub (RTIH) is at the heart of this entrepreneurship drive that draws upon Hon'ble Chief Minister, Shri N Chandrababu Naidu's clarion call for 'One Family, One Entrepreneur'.
- While most startup ventures in India come up in the major cities, with the founding teams tapping into the evolved startup ecosystems there, RTIH is mandated to identify entrepreneurial talent across the cities, towns and villages of Andhra Pradesh, help incubate their innovative ideas, and get them executed in the field. This initiative is industry-driven, with the state government connecting the private sector with VC/PE funds, educational institutions, among others.
- As the startup ventures transit the business journey from early stage funding and mentoring, pass through catalysts and velocity labs and get into mass production, they enter the MSME arena, which again receives critical support from the Andhra Pradesh government.
- The panel discussed how entrepreneurs based in the smaller cities and towns could be provided critical support as they build solutions for the globe. Two key support systems that are vital for this being: access to (i) capital and (ii) a talent pool. All this to be backed by an enabling business environment. The 'Vizag Entrepreneurship Mission' was cited as a case in point.
- Speakers also underlined the need for instilling entrepreneurial thinking among school students, as well as promoting the use of AI across the state.
- Government of Andhra Pradesh reaffirmed its commitment to the goal of enhancing the Ease of Doing Business for MSMEs, and is ushering in efficient logistics and certification processes for the enterprises. Government has also set the goal of creating 1 lakh women entrepreneurs in the state every year. Besides, initiatives are being taken to engage the Telugu Diaspora to supporting MSMEs with global market access.
- The session concluded with the view that sustained MSME growth is pivotal to Andhra Pradesh becoming the targeted USD 2.3 trillion economy by 2047.

Key Recommendations

- Deepen Decentralised Incubation Models:** Scale the RTIH approach across districts to systematically identify, incubate, and mentor entrepreneurs beyond major cities, ensuring access to capital, industry networks, and government data for grassroots innovation.
- Strengthen The Startup-MSME Transition Pipeline:** Design structured pathways that support startups in graduating to MSMEs, including assistance in manufacturing scale-up, logistics, certification, and market access to ensure longevity beyond the early innovation phase.
- Reform Education to Embed Entrepreneurship Early:** Shift professional education toward innovation-centric learning with flexible academic models, early exposure to real-world challenges, and safety nets that encourage risk-taking without penalising failure.
- Broaden Sectoral Focus Beyond IT Startups:** Promote entrepreneurship in sectors that contribute much more to GDP and generate a high number of jobs, such as, tourism, dairy, and agri-processing, to ensure that innovation-led growth translates into broad-based economic impact.





India's Scale Advantage: Building Global Champions

Speakers

Mr Bhaskar Katamneni

Secretary – IT, Department of Electronics and Communications Government of Andhra Pradesh

Prof Satya Chakravarthi

CTO, Founder The ePlane Company

Mr Tushar Singhvi

Deputy CEO & Head of Investments Crescent Enterprises

Mr Rohit Sarkar

Founder & CEO Distronix

Mr Srinivasa Rao Aluri

Chairman QuNu Labs Pvt Ltd

Dr Venkata Ramana

Founder & CEO Avera

Moderated by

Mr Murali Krishna Gannamani

Chairman CII Andhra Pradesh and Founder & CEO Fluentgrid Ltd

Key Highlights of the Discussion

- The panel drew attention to initiatives taken by the Andhra Pradesh government to promote home-grown product-based startups. The 'One Family One Entrepreneur' scheme was highlighted with the aim of producing more unicorn startups from the state. Speakers discussed the availability of government procurement for such startups up to USD 0.11 million, with the aim of increasing this sum to USD 0.55 million by the end of the year. Moreover, state initiatives to provide financial support to startups during the testing and certification phase of product development were also highlighted.
- Speakers emphasised the importance of supporting entrepreneurship through destigmatisation of failure and encouragement of novel ideas. The panel called for the founders of startups to be more patient and persevering, taking failures as experience rather than end-points.
- Indigenisation of intellectual property was seen as imperative, with speakers drawing attention to the scale advantage present in testing and developing projects for the Indian market. They also highlighted the significant purchasing power presented by the Indian middle-class marketplace, which would be highly beneficial to startups looking to validate their business models on a large scale. Testing products at a large scale in India while developing them to meet global standards was seen to make acceptance into the global market easier. Leveraging the scale and talent present in the country was discussed as key, with importance placed upon promoting home-grown talent worldwide.
- Seeking partnerships with universities, professors and subject matter experts, manufacturing ecosystems and labs was seen as imperative for startups. Speakers drew attention to incubation cells in universities and government-level programs that provide support for startups. The panel identified room for improvement in increasing the scale of mentorship programmes fostered by alumni networks, drawing attention to the need for spreading such programs across the country.
- Speakers also emphasised the lengthy development phase products must go through before being released to the market and the importance of receiving funding throughout this process. Startups were advised to be frugal, agile and capable of pivoting to new market opportunities when searching for funding. Patient capital from the side of the investors was seen as vital.
- Panellists discussed the necessity for a shift in mindset in Indian procurement agencies from buying products from the West to buying indigenously sourced products.
- However, they also drew attention to the lengthy R&D process involved in creating deep-tech products such as AI, and emphasised the need to start development early if India wishes to

compete at a global level. The need for developing solid use cases before bringing products to the international level was highlighted, as it would help build credibility.

- The panel discussed the development of the Amaravati Quantum Valley in AP, drawing attention to the need for

increased funding for the project. In this regard, they also drew attention to the release of a Quantum- Computing Policy by the AP government, which would tackle the financial concerns raised. The need for developing credible use cases to take full advantage of the quantum hub was emphasised.

Key Recommendations

- **Leverage India's Domestic Market Size:** India's large domestic market, digital public infrastructure and manufacturing capabilities are to be leverage for scaling of startups.
- **Destigmatise Failure:** A cultural shift that destigmatises failure and promotes risk-taking is important for supporting innovators.
- **Promote Industry-Academia Interface:** Institutional support through collaborations between startups and universities, research labs, subject-matter experts, and manufacturing ecosystems is essential. Establishing and expanding incubation cells across universities nationwide and strengthening mentorship networks through alumni and industry partnerships is vital.
- **Indigenise IP and Encourage Startups to Validate Products Within India:** Focus must shift from providing services globally to creating products and IP, supported by accelerating certification processes and prioritising domestic procurement.
- **Investors Must Provide Long-Term Patient Capital for Deep-Tech and Product-Based Startups:** Startups must remain agile, frugal and adaptable during R&D cycles. Reliable use-cases must be developed before global market entry to establish trust and gain credibility on the international level.



India's Space Leap: From National Capability to Global Competitiveness

Speakers

Mr Bhaskar Katamneni

Secretary
Information Technology Electronics
& Communications Department
Government of Andhra Pradesh

Panellists

Mr A Arunachalam

Director- Technical & Strategy
NewSpace India Limited (NSIL)

Mr Bijaya Kumar Behera

Associate Scientific Secretary
& Director-AS, ISRO

Mr Arun T Ramchandani

Senior Vice President & Head
Precision Engineering and Systems
(PES) IC, Larsen & Toubro

Mr Anirudh Sharma

CEO & Founder
Digantara

Mr Prant Mehta

Co-Founder
GalaxEye

Moderated by

Dr Vinod Kumar

Director-PD
Indian National Space Promotion and
Authorisation Centre (IN-SPACe)

Key Highlights of the Discussion

- The session offered an in-depth analysis of India's evolving space sector, highlighting its rapid shift from building national capabilities to pursuing global commercial leadership. Speakers underscored that India today possesses mature, end-to-end expertise across all major space verticals, Earth observation, communication, navigation, interplanetary missions, planetary science, launch vehicle development, and space applications.
 - Historic missions such as Chandrayaan-3's landing on the lunar south pole, the Mars Orbiter Mission, and the Aditya-L1 solar observatory were cited as evidence of India's unique ability to deliver world-class outcomes at globally competitive costs. With the global space economy approaching USD 500 billion, the session emphasised that India is now preparing to scale its presence through industry participation, private innovation, and state-level ecosystem development.
 - A core theme of the discussion was the growing shift of operational responsibilities from ISRO to the private sector. ISRO leaders outlined a clear strategy that systems that are already proven will be transitioned entirely to industry for mass production, while ISRO will concentrate on advanced R&D and next-generation scientific missions.
 - At the state level, Andhra Pradesh presented one of the most ambitious regional space-development strategies in India. Hosting the country's primary launch site at Sriharikota, the state aims to build two major space clusters. The first, centred in Tirupati, will focus on launch-vehicle manufacturing, integration, and assembly.
- The second, in Sri Sathya Sai district, will support satellite components, subsystem development, and supporting industries.
- The session also highlighted the institutional and policy architecture shaping India's modern space governance. The Indian Space Policy 2023 provides clarity on the roles of ISRO, IN-SPACe, NewSpace India Limited (NSIL), and private entities. IN-SPACe, established in 2020, now serves as both regulator and promoter, an unusual global model that allows it to ensure safety and compliance while simultaneously enabling industry growth.
 - IN-SPACe has already transferred more than 100 ISRO technologies to private industry. Its financial architecture includes a INR 10 million Seed Fund Scheme to support early-stage startups, a INR 5 billion Technology Adoption Fund to help companies absorb and adapt advanced technologies, and a INR 10 billion Venture Capital Fund operationalised through SIDBI, with the first INR 1 billion disbursement expected by year-end.



- NSIL's strategic roadmap for expanding India's global commercial presence focused on three pillars, which are quality and reliability, cost competitiveness, and timely delivery. Through partnerships with HAL and L&T for PSLV and SSLV production, plans to increase LVM3 manufacturing, and development of the Next-Generation Launch Vehicle (NGLV) with a reusable first stage, NSIL aims to position India as a preferred global launch provider.
- The session highlighted that India's space sector is poised for accelerated growth, driven by strong policy direction, rising private capacity, expanding state-level initiatives, and increasing global demand. The pathway to global competitiveness is now clearly defined as scaling manufacturing through industry participation, fostering innovation through ISRO and startups, deepening funding and infrastructure access, ensuring regulatory clarity, and expanding India's international footprint.

Key Recommendations

- **Scale Private Manufacturing Of Launch Vehicles And Satellites:** Accelerate technology transfer and simplify production licensing to enable rapid industry scale-up. Introduce multi-year government procurement commitments and long-term launch contracts, prioritising standardised satellite bus platforms to improve efficiency, reduce costs, and support predictable demand for private manufacturers.
- **Build Specialised Space Industrial Clusters and Supply Chains:** Develop plug-and-play space industrial clusters with integrated testing, certification, raw material access, and logistics infrastructure. Position Andhra Pradesh's launch and satellite clusters as national hubs for end-to-end space manufacturing, strengthening domestic supply chains and reducing dependence on external vendors.
- **Strengthen Financing and Risk-sharing Models:** Expand venture capital, blended finance instruments, and insurance mechanisms to de-risk capital-intensive space investments. Establish co-funded R&D platforms involving government laboratories, industry, and academia to share technological risk while accelerating commercialisation of next-generation space systems.
- **Accelerate Talent Development and International Collaboration:** Scale specialised space engineering programmes, apprenticeships, and startup incubation initiatives. Deepen partnerships with global space agencies, universities, and research institutions to build advanced technical skills, support knowledge transfer, and integrate Indian industry more effectively into global space markets.



GOVERNMENT OF ANDHRA PRADESH



Release of Andhra Pradesh Quantum Computing Policy (2025 - 2030)

Shri. Nara Lokesh
Minister for Information & C, Government of Andhra Pradesh



Atmanirbhar Quantum – Building India’s Indigenous Quantum Stack in Andhra Pradesh

Speakers

Mr P S Pradyumna

Secretary to Chief Minister
Government of Andhra Pradesh

Mr Bhaskar Katamneni

Secretary – IT Electronics & Communications RTG and HRD
Government of Andhra Pradesh

Dr K N Satyanarayana

Director
IIT Tirupati

Mr Devroop Dhar

Co-Founder & CEO
Primus Partners Pvt Ltd

Mr Amith Singhee

Director & CTO
IBM

Mr Srinivasa Rao Aluri

Chairman & Co-Founder
QNu Labs

Mr Vishal Chatrath

Co-Founder & CEO
Quantril OX

Mr Ganesh Srinivasan

Partner SDE-Manager
Microsoft India Development Centre

Dr J.B.V.Reddy

Mission Director
National Quantum Mission

Mr Robert Mauro

CEO Pascal

Moderated by

Mr Sridhar CV

Head
ACAD COIN & India Strategic Initiatives

Key Highlights of the Discussion

- The panel explored how Andhra Pradesh is attempting to position Amaravati as one of the world's leading hubs for quantum technologies through a combination of vision, policy action and rapid execution. Panellists emphasised that the state's commitment to the sector stems from an early recognition that quantum computing will shape national capability, technological sovereignty and future economic strength. The discussion began by noting that Andhra Pradesh has moved from concept to detailed planning in a short span through the creation of the Quantum Valley, which is built on four pillars: deployment of a quantum computer, development of software and algorithms, creation of a talent ecosystem and an ambitious push into hardware manufacturing.
- The National Quantum Mission outlined its roadmap and highlighted India's broader strategy to build quantum capability across computing, communication, sensing and materials. The mission has established thematic hubs in leading institutions across India, bringing together researchers from multiple disciplines and creating a structured approach to innovation, industry collaboration and startup development. Panellists noted that India's effort is designed to strengthen self-reliance while building global linkages, and that the Amaravati initiative has been welcomed as a national anchor, given the scale of infrastructure and political support being mobilised at the state level.
- The session placed significant emphasis on the newly released Quantum Valley policy, which introduces a dedicated incentive framework for companies in the quantum domain. Panellists explained that quantum technologies require substantial capital investment and cannot be supported through traditional IT-oriented policies. The state committed to providing upfront financial support, infrastructure access, subsidised facilities and streamlined approvals.
- The discussion went into how Amaravati's Quantum Valley is being built to cover the full quantum value chain, including algorithm development, software engineering, hardware manufacturing, high-performance computing integration and advanced research. Panellists mentioned that the state has already received dozens of project proposals, many of which have been approved for immediate processing. The focus is on ensuring that the policy is actionable from the start, with government orders and support mechanisms ready for deployment. In parallel, a series of MOUs with global companies, research institutions and skilling organisations were highlighted as evidence of growing momentum.
- The discussion highlighted that quantum readiness also demands significant talent development, with programmes, such as, quantum minors, faculty training, skill development initiatives and state-wide awareness campaigns already underway. Institutions like IIT Tirupati described ongoing work in atomic clocks, communication systems and quantum sensing, all of which complement Amaravati's ambitions.

- The session concluded with a shared view that Andhra Pradesh has an opportunity to build one of the world's few end-to-end quantum ecosystems by combining global partnerships, indigenous development and a strong talent base. With clear political direction, rapid execution and

alignment with the National Quantum Mission, panellists expressed confidence that Amaravati can evolve into a top global quantum hub and contribute meaningfully to India's technological leadership in the coming decade.

Key Recommendations

- **Build a Unified Quantum Hardware Manufacturing Ecosystem:** Expand the hardware park, testing facilities, cryogenic labs and component manufacturing capabilities to support end to end indigenous hardware development.
- **Accelerate Demand-led Quantum Adoption Across Government Systems:** Use government datasets, sandbox environments and pilot programs to create early demand and validate quantum applications in areas such as security, logistics and public systems.
- **Develop Global Partnerships into Structured Supply Chain Linkages:** Convert MoUs into long-term agreements that support hardware components, chip testing, high performance computing integration and cross-border research collaborations.
- **Create Targeted Funding Pathways for Deep Tech Startups:** Establish specialised financing mechanisms that reduce risk, support iterative R&D cycles and give startups access to subsidised hardware, testbeds and early grants.





Future of Food: Innovation, Integration, and Inclusion

Session Chair

Mr Kinjarapu Atchannaidu

*Hon'ble Minister for Agriculture
Marketing and Fisheries
Government of Andhra Pradesh*

Panellists

Mr Rajeev Chawla

*Strategic Advisor and
Chief Knowledge Officer
Ministry of Agriculture and
Farmers Welfare
Government of India*

Mr Vijay Kumar

*Executive Vice Chairman
Rythu Sadhikara Samstha - Advisor
Government of Andhra Pradesh*

Mr James Marc de Sousa-Shields

*Country Director for India
International Fund for
Agricultural Development (IFAD)*

Ms Aastha Bajaj

*Founder & Director
Ancient Indian Organics*

Mr Pawan Krishna Kosaraju

*Founder & CEO
Aqua Exchange*

Moderated by

Mr Budithi Rajsekhar

*Special Chief Secretary – Agriculture
Government of Andhra Pradesh*

Key Highlights of the Discussion

- At the outset of the deliberations, the panel laid emphasis on the crucial connection between food systems, human well-being, and planetary health. It was pointed out that food is not only important for nutrition but also a key factor in environmental sustainability. Current food production practices have already contributed to the transgression of six out of nine critical ecological boundaries, which points to the need for transformative approaches in agriculture and food systems.
- Agriculture remains the backbone of the economy in regions where industrial and service sectors are still developing. The primary sector continues to account for a significant share of the economic output, with downstream industries heavily reliant on agricultural raw materials. The discussion reinforced the idea that farmers, often taking on the greatest risks, are key entrepreneurs within the food system and that their prosperity is foundational to broader economic and social stability.
- Women-led farmer collectives were recognised as a transformative force in rural development. By focusing on both agricultural production and family nutrition, these collectives have improved incomes, strengthened resilience to extreme weather events, and produced more nutritious, lower-carbon crops. This inclusive approach is now being considered for wider national replication, given its positive outcomes in food security, climate adaptation, and community empowerment.
- The integration of digital technologies emerged as a central theme. The development of a comprehensive digital agriculture stack was discussed as an example of leveraging data-driven approaches to ensure last-mile inclusion. This digital infrastructure enables precise targeting of services, efficient delivery of credit and insurance, personalised advisory support, and improved market access for smallholders, women, and tenant farmers. The opening of these digital platforms to private and public sector collaboration was seen as a catalyst for innovation and scalability.
- The discussion also highlighted the critical role of supply chain innovation in achieving efficiency, inclusivity, and sustainability. The use of satellite imagery, mobile applications, and real-time monitoring now enables engagement with thousands of small land holders and tribal farmers, ensuring traceability, compliance with international certification standards, and continuous improvement of environmental and social outcomes across the supply chain. Technology was identified as a key enabler for scaling impact and



maintaining transparency as organisations work with increasingly larger and more diverse groups of farmers.

- Throughout the session, a recurring message was the need for holistic, integrated solutions to address the complex challenges facing food systems. The future of food depends on continued innovation, the seamless integration of technology and policy, and the inclusion of all stakeholders—from women and

smallholders to industry and global markets—in the journey toward resilient, profitable, and sustainable agriculture.



Key Recommendations

- **Shift to an Integrated Food-Systems Framework:** Policy design must move beyond production-centric approaches toward a comprehensive food-systems framework that simultaneously advances nutrition outcomes, farmer livelihoods, environmental sustainability, and efficient market linkages. Treating the entire value chain as an interconnected system is essential to improving resilience, reducing waste, and strengthening long-term economic and ecological outcomes.
- **Scale Climate-Resilient and Natural Farming Models:** Accelerating the adoption of natural and climate-smart farming practices is critical to reducing chemical dependence, restoring soil health, improving nutritional quality, and enhancing resilience to climate shocks. These models offer a sustainable pathway for smallholders while aligning agricultural productivity with long-term environmental and public health goals.
- **Reposition Farmers as Entrepreneurs and Economic Agents:** Farmers must be recognised as risk-taking entrepreneurs rather than passive beneficiaries. Policies should ensure predictable market access, robust extension services, affordable credit, insurance coverage, and technology support that together enable farmers to manage risk, innovate, and participate more effectively in modern agri-value chains.
- **Anchor Transformation in Inclusion, Finance and Governance:** Long-term food-system transformation requires aligning climate-linked finance, supply-chain transparency, women-led farmer organisations, and strong local institutions within stable policy frameworks. Integrating social equity, financial inclusion, and technological innovation is essential to building resilient, profitable, and environmentally sustainable food systems.

Track V – Growth

The COVID-19 pandemic and regional conflicts in key geographies have significantly impacted the global economic outlook, which has forced governments, industries, and central banks around the world to navigate a new growth trajectory in the context of a high inflation and interest rate environment. Moreover, supply shocks caused by overreliance on specific trade partners has led to a conscious effort by the global community to diversify and derisk global value chains, which has provided countries like India and its partners to increase their competitiveness and participation in the Global South.

The current period of global geoeconomic rebalancing provides an opportunity for the global financial ecosystem as well as institutions to be reformed to become more inclusive of global economies, particularly those in the Global South. As a prominent emerging economy, India is significantly investing in building out the infrastructure to stimulate growth and increase its participation and shaping the future of global economic order alongside its multilateral partners.



Technology, Trust and Trade: Navigating the New Geoeconomic Order

Speakers

Mr Amit Kalyani

Vice Chairman &
Joint Managing Director
Bharat Forge Limited

Dr Soumitra Dutta

President
Portulans Institute

Key Highlights of the Discussion

- In a rapidly transforming global landscape shaped by AI, the session delivered a powerful and forward-looking narrative on how India can strategically position itself as a leader in the AI-driven economy. The discussion underscored that India possesses distinctive structural advantages that, if leveraged wisely, can boost it to the forefront of global innovation. At the same time, the speakers cautioned that technology-enabled progress must not come at the expense of human dignity, employment, and social stability.
- A key idea presented was that global AI leadership rests on three foundational pillars, which are business data, computing or chip manufacturing, and energy. While India's semiconductor manufacturing capabilities remain limited, a gap that government initiatives aim to reduce over the next decade, the country's strengths in the other two areas are substantial.
- Energy emerged as the next pillar where India holds promising potential. The speakers emphasised that continued investments in solar parks, battery storage, and clean energy capacity will be essential for India to sustain an AI-driven future. Leveraging its natural renewable energy advantages could give India a long-term strategic edge in powering AI infrastructure.

- Despite these strengths, there is much scope for further collaboration in the area of R&D. There is a need for more research funding, deepened industry-academia collaboration, and more evolved innovation ecosystems. The need of the hour, is that to achieve the goals of Viksit Bharat 2047, India must aim to significantly expand its R&D spending and strengthen the institutional foundations of scientific and technological research.
- The session closed on an optimistic yet pragmatic note about India's entrepreneurial momentum.

More young graduates are choosing to build start-ups instead of pursuing traditional jobs, reflecting a cultural shift that mirrors global innovation hotspots. However, while seed funding is widely available, India continues to face a severe shortage of growth capital in the USD 11.12-55.6 mn range, limiting the ability of promising start-ups to scale. The speakers stressed the need to bridge this funding gap and to de-stigmatise failure, drawing inspiration from ecosystems, where multiple failed ventures are seen as steps toward eventual success.

Key Recommendations

- **Scale National R&D Investment & Research Autonomy:** Increase India's R&D expenditure from 0.6% to at least 1.5% of GDP in the medium term, targeting 3% by 2047. Incentivise private R&D investment and empower universities with funding autonomy, research excellence clusters, and international partnerships to accelerate deep-tech innovation.
- **Build an AI-Ready Workforce & Education Reform:** Integrate AI literacy, computational thinking, and digital problem-solving into school and university curricula. Expand training in machine language, data science, semiconductors, robotics, and cognitive sciences. Implement national AI certification frameworks to ensure baseline competencies across industries.
- **Expand Renewable Energy Capacity for AI Infrastructure:** Accelerate investment

in solar and hybrid energy parks, battery storage, and green-powered data centres to support energy-intensive AI deployment. Setting up renewable-generation capacity in and around data-centre clusters will stabilise long-term operating costs too, thereby directly reducing the costs of IT exports.

- **Develop a Strategic Semiconductor Roadmap:** Prioritise design-led chip manufacturing while advancing long-term fabrication capability through public-private partnerships, global alliances, and targeted subsidy models. Building semiconductor industrial clusters, with closely located suppliers, testing labs, packaging units, and logistics infrastructure will dramatically reduce production timelines and costs by enabling end-to-end value-chain efficiencies.



Unlocking India's Eastward Gateway: Reducing Logistics Costs and Powering Manufacturing through Coastal Advantage

Speakers

Mr B C Janardhan Reddy

*Hon'ble Minister for Roads & Buildings
Infrastructure & Investment
Government of Andhra Pradesh*

Mr Damacharla Satyanarayana

*Chairman, Andhra Pradesh
Maritime Board (APMB)
Government of Andhra Pradesh*

Mr Dr Z Sivaprasad

*Chairman
Andhra Pradesh
Inland waterways Authority*

Mr Praveen Adhithya CV

*Managing Director (FAC)
APADCL*

Mr M T Krishna Babu

*Special Chief Secretary, I&I
Government of Andhra Pradesh*

Panel Discussion

Mr Rakesh Gaonkar

*Founder & CTO
@ Sarla Aviation*

Mr Amlan Bora

*Chief Representative for Port of
Rotterdam in India
Sri Lanka and Bangladesh*

Mr Rinkesh Roy

*Jt MD & CEO
JSW Infrastructure Ltd*

Mr Vivek Sharma

*Head - Public Policy &
Regulatory Affairs APM Terminals*

Mr Sanjiv Edward

*CEO
GMR Group*

Moderated by

Mr Shravan Shetty

*Managing Director
Primus Partners, India*

Key Highlights of the Discussion

- The deliberations focused upon how Andhra Pradesh is positioning its coastline, port network and multimodal logistics infrastructure as the core of a long-term strategy to become India's most competitive eastern trade gateway. Speakers emphasised that the objective is not only to expand port capacity but also to create an integrated logistics and industrial ecosystem that links ports, waterways, industrial nodes, highways, rail corridors and airports in a coordinated manner. The state's long coastline and deep-draft port potential were highlighted as natural strengths, supported by ongoing development of new greenfield ports and maritime infrastructure aimed at reducing logistics costs and improving export competitiveness.
- Policy clarity and investor-facing facilitation measures were also discussed as foundational to attracting long-term commitments. The maritime policy framework includes transparent benchmarks, investor-service mechanisms and dedicated facilitation cells intended to shorten project cycles. In parallel, new rail links, improved highway networks and inland waterways connectivity are being prioritised to support port-led industrial development. Reference was made to Andhra Pradesh handling a significant portion of eastern coast cargo, positioning it to support India's efforts to rebalance trade infrastructure between coasts.
- A shipping-sector perspective highlighted that India holds the potential to evolve into a meaningful node in international network planning, driven by increasing cargo volumes, deeper ports under development and supportive policy direction. It was shared that hub-and-spoke planning models favour locations that offer cost-efficient last-mile connectivity, predictable timelines and future-ready infrastructure. This reinforces the need for continued development of inland cargo funnels and multi-modal linkages to strengthen long-term viability.
- The deliberations went into how multimodal logistics models can unlock higher value by integrating airport capacity, cargo terminals and sea-air corridors. With new infrastructure coming up, the region has an opportunity to pilot India's first seamless port-to-airport multimodal hub, similar to successful global models. However, for such hubs to scale, supporting infrastructure such as irradiation facilities for perishable exports and aquatic quarantine systems would also be required close to the logistics clusters to prevent value leakage to other states.
- The discussion concluded with the view that Andhra Pradesh's long-term logistics ambitions will be shaped by coordinated planning, multimodal integration, digital transparency, and infrastructure that matches global efficiency benchmarks. The panel agreed that the state's evolving port-centric development model is most likely to succeed when industrial, policy, digital and transport capabilities advance together rather than as independent enablers.





Where Debate Becomes Dialogue: IT and GCCs in Tier-2 Cities in India: Breaking Barriers or Building Illusions?

Session Chairman

Mr Nara Lokesh
Hon'ble Minister for Human Resources Development; IT Electronics & Communication; RTG Government of Andhra Pradesh

Mr Kapil Joshi
*CEO, IT Staffing
Quess Corp Ltd*

Mr Vikram Ahuja
Co-Founder, ANSR

Panellists

Ms Aditi Shukla
Head of India Shared Services and Country Head India AXA XL

Mr Rajesh Mani
SVP, Head of Asia Pacific Technology Hubs Mastercard

Mr Gaurav Hazra
VP & Head-Govt Affairs Asia Pacific, Cognizant

Mr Sridhar Venkataraman
Global Head of Delivery Centres & Shared Services, TCS

Moderated by

Mr Nilaya Varma
*Co-founder & Group CEO
Primus Partners Pvt Ltd*

Key Highlights of the Discussion

- India's Global Capability Centre (GCC) landscape has evolved dramatically, shifting from cost-arbitrage delivery centres to high-value innovation hubs that now contribute directly to enterprise-level technology, capability building, and global competitiveness.
- While most GCCs in India came up in major metros, Tier-2 cities like Visakhapatnam are now seen as ideal locations for these centres to be established. It was stated in the session that traditional GCC locations are no longer default choices. Companies are increasingly evaluating cities based on a broader set of factors: quality and availability of talent, infrastructure reliability, quality of life, scalability, and operational costs.
- The panel emphasised that the debate is not "metro vs. non-metro," but rather demand-supply equilibrium in talent markets. Metros today face extreme pressure due to high concentration of companies, creating severe mismatches between talent demand and availability.
- Metros carry significant operational challenges—overstretched infrastructure, escalating real estate and talent costs, and chronically high attrition rates driven by the constant presence of competing employers on every street. These challenges make long-term planning, stability, and scalability difficult for GCCs in tier-1 cities.
- Tier-2 cities in contrast are entering a strong innovation phase, powered by three drivers: robust digital infrastructure, a rapidly expanding higher-education network supplying high-quality talent, and strong government commitment to sustainable technology-led growth.
- The session also featured the release of a jointly developed book by the Government of Andhra Pradesh, NASSCOM, and Prime Partners, showcasing Visakhapatnam as the next major hub for IT and Global Capability Centres (GCCs).
- With talent as a central theme, Andhra Pradesh has introduced Kaushalam talent portal as a decisive solution to this challenge. Kaushalam is a unified, state-wide employability platform, built to provide companies, particularly GCCs and IT/ITES firms, instant access to a verified talent pool across Andhra Pradesh. The state has mapped the skills of qualified youth through proctored assessments, capturing detailed information on quantitative aptitude, communication, problem-solving, teamwork, and leadership.
- Each candidate is rated on a 0–10 numerical scale across multiple competencies, generating a transparent and granular capability profile. Companies can filter talent by qualification, skill levels, and job-role readiness, making hiring significantly more predictable and efficient.
- The portal integrates seamlessly with corporate HR systems. Firms do not need to change their internal software; Kaushalam provides API-based integration that allows companies to directly plug into the state's talent database for screening, assessments, interviews, and onboarding.

Key Recommendations

- Shift to a Portfolio-based GCC Location Model:** Encourage global enterprises to adopt diversified location strategies that balance Tier-1 metros with Tier-2 hubs. This portfolio approach improves operational resilience, manages costs, and enables scalable expansion while reducing concentration risks associated with single-city GCC footprints.
- Position GCCs as Innovation, R&D, And IP Engines:** Move beyond transactional service delivery by incentivising GCCs focused on AI-led operations, product development, applied research, and patent creation. Link state and national incentives to measurable innovation outcomes, reinforcing India's role as a global digital and knowledge hub.
- Build Tier-2 Cities as Complete Innovation Ecosystems:** Develop Tier-2 hubs holistically through parallel investments in physical infrastructure, digital connectivity, housing, mobility, and social amenities. Integrated urban development is essential for attracting, retaining, and scaling high-quality GCC talent over the long term.
- Institutionalise Data-Driven Talent and Hiring Infrastructure:** Scale workforce intelligence platforms, such as, Naipunyum and interoperable hiring systems like Kaushalam to provide real-time visibility into skills availability and demand. API-enabled integration with corporate HR systems can shorten hiring cycles, improve predictability, and reduce employer risk.





From Coastal Charm to Global Conferences – Unlocking AP's Tourism Potential

Session Chairman

Mr Kandula Durgesh

Hon'ble Minister for Tourism
Culture & Cinematography
Government of Andhra Pradesh

Mr Jurgen Bailom

President &
Chief Executive Officer
Cordelia Cruises by Waterways
Leisure Tourism Limited

Mr Pavan Guntupalli

Co-Founder
Rapido

Moderated by

Mr Vikram Cotah

CEO
GRT Hotels

Speakers

Mr Ajay Jain

Special Chief Secretary
Youth Advancement
Tourism and Culture
Government of Andhra Pradesh

Mr Satyajeet Krishnan

Senior Vice President
Operations
IHCL

Mr Ravi Gosain

President, Indian Association
of Tour Operators (IATO)

Mr Manoj Kumar

Additional Principal Chief Conservator
of Forests & EX-Managing Director
Jungle Lodges and Resorts
Karnataka

Mr Ved Khanna

President
Association of Domestic Tour
Operators of India (ADTOI)

Key Highlights of the Discussion

- The panel discussed the Swarna Andhra Tourism Vision @ 2047 and highlighted the state government's goals for the next five years, which include attracting private investments of around USD 2.78 billion, increasing room inventory, increasing GVA by up to 8% and increasing employment share.
- Speakers discussed the state government initiatives underway to provide support to upcoming tourism projects, including capital investment subsidies, land allocation policies, employment subsidies and State Goods and Services Tax (SGST) reimbursement for a period of 7-15 years. The panel identified the future of tourism in Andhra Pradesh as resting on key tenets: economic activity, connectivity and conviction.
- The potential for ecotourism in AP, which can connect tourists with nature and the local culture, was discussed. Speakers identified potential in reviving Araku Valley, Lambasingi and Koringa river as sustainable tourism locations. Making the state government's forest department a stakeholder was seen as key to fostering these developments.

Uniqueness, diversity of location and availability of activities were highlighted as key elements in creating successful ecotourism.

- Focusing on younger audiences in the 18-35 years age group as well as crafting compelling narratives to attract their business, was seen as critical for achieving marketing success.

The panel called for increased investment in the business of providing memorable experiences to tourists, as well as investment in infrastructure and hospitality.

- Identifying key assets of the state and building marketing strategies around them was seen as a priority. Nature, wellness and AP's coastline were identified as important, unique points to focus on when marketing tourism in the state. Effective, engaging storytelling that endorses AP's strengths was seen as imperative. Speakers recommended branding and campaigns that focus on the core advantages the state possesses.
- The panel discussed responsible tourism as a key focus, promoting sustainability through the use of renewable energy, water management, waste management, afforestation and using local supply chains. Involving the local community to showcase art, culture and culinary experiences from AP was recommended, along with skilling the local youth. Moreover, the creation of travel experiences in which guests can interact with the local community in order to learn about the culture and create an impact locally was also recommended.
- The panel discussed efforts taken to convert AP's coastline to world-class sustainable tourism products through integrated beach resorts, ecotourism and adventure, marine and cruise tourism.



Key Recommendations

- Promote Crafts, Culture, Cuisine And Natural Assets:** AP should leverage its rich crafts, culture, cuisine and natural assets to boost tourism while attracting investment in hospitality and world-class infrastructure.
- Digitisation, Multi-modal Transport & Local Guides:** Digitising transactions and tourist networks will streamline the visitor experience. Improved multimodal transport and training local guides can further enhance cultural engagement for tourists.
- Coastal Tourism Development:** AP's extensive coastline offers major opportunities for developing cruise tourism, including ocean, river and inland waterway cruises. Creating integrated beach resorts and promoting marine adventure and ecotourism can position AP as an attractive coastal tourism destination.
- Sustainable Tourism:** Reviving natural sites such as Araku Valley, Lambasingi and Koringa as sustainable destinations for ecotourism is vital. Emphasis on renewable energy, waste and water management, afforestation and local supply chains will ensure responsible tourism.
- Drawing International Inbound Tourists:** Improved air and road connectivity, and modern convention infrastructure are essential for establishing Visakhapatnam as a major MICE destination. Investor-friendly policy frameworks will further support global competitiveness.





Global Financial Architecture: Time for a Reset?

Keynote Address

Hon John Michaël Tzoun
Sao Yeung Sik Yuen
 Minister of Commerce and Consumer Protection, Mauritius

Ms Sara Eid
 Advisor to the Minister of Finance for Transparency and Community Participation
 Ministry of Finance
 Arab Republic of Egypt

Panellists

Mr Peeyush Kumar
 Principal Secretary to Government (PFS) (FAC) (CT) Finance
 Government of Andhra Pradesh

Ms Nadia Petkova
 Managing Director Impact & Partnerships
 European Bank for Reconstruction and Development (EBRD)

Moderated by

Mr Rajiv Memani
 President
 Confederation of Indian Industry (CII) and Chairman & CEO, EY India

Key Highlights of the Discussion

- The session highlighted that rapid digitalisation is fundamentally reshaping global finance, with India emerging as a prominent example of how technology can democratise access to financial services. India's national digital public infrastructure, anchored by UPI, Aadhaar, and rapidly expanding 5G connectivity has transformed the scale and speed of digital payments.
- Today, the country processes over 50 million real-time transactions every day, accounting for nearly 50-60% of global instant payments. The success of UPI has extended beyond India's borders, influencing payment frameworks in countries such as Singapore, France, and the UAE, positioning India as a reference point for digital financial innovation.

- Building on this national digital architecture, the panellists discussed how Indian states are deploying technology to deepen inclusion and strengthen public governance. Andhra Pradesh provided a compelling case study of state-led digital transformation, showcasing its robust real-time governance systems, AI-driven service delivery models, WhatsApp-based citizen engagement channels, and data-centric welfare administration. Andhra Pradesh exemplifies how state-level initiatives can translate national digital infrastructure into tangible improvements in service delivery, efficiency, and transparency.
- Emerging financial technologies, including Central Bank Digital Currencies (CBDCs), programmable money, stable-coins, and fintech-driven SME credit offer unprecedented opportunities for liquidity, efficiency, and cross-border integration. Yet their benefits can only be realised through strong governance, harmonised standards, and trust-based international cooperation. Speakers emphasised that digital innovation must be matched with coordinated global frameworks to ensure that the next stage of digital finance remains secure, inclusive, and resilient.
- The discussion then moved to confronting escalating geopolitical shocks and mounting fiscal pressures. Recent disruptions, from the supply-chain breakdowns to tariff conflicts and strategic rivalries have exposed deep cracks in the existing financial architecture. Global public debt has risen sharply to USD 102 trillion, nearly 95% of world GDP, and reflects increasing vulnerability, particularly for emerging economies that already struggle with limited fiscal space.
- Complementing this perspective, the European Bank for Reconstruction and Development (EBRD) stressed the vital role of blended finance and early policy collaboration in addressing widening development and climate-finance gaps. With global Official Development Assistance (ODA) budgets declining, Multilateral Development Banks (MDBs) must move from fragmented approaches to unified strategies that pool resources, coordinate interventions, and mobilise private capital more effectively.
- Throughout the session, panellists also addressed the growing domestic fiscal pressures faced by governments. Indian states, including Andhra Pradesh, must manage the dual responsibility of sustaining welfare commitments, particularly through DBT programmes, while also investing in long-term growth drivers such as infrastructure, agriculture, renewable energy, and human capital. The discussion highlighted the need for disciplined fiscal planning and efficient execution to ensure that rising welfare expectations do not undermine long-term development priorities.
- The session emphasised that the future of global financial architecture will depend on the integration of technology, trust, and transparent governance. National digital models like India's state-led innovations, such as, those in Andhra Pradesh, and international frameworks exemplified by Mauritius and the EBRD provide important building blocks. Yet the path forward requires deeper South-South cooperation, stronger regional integration, and more coordinated action between governments, MDBs, and the private sector.

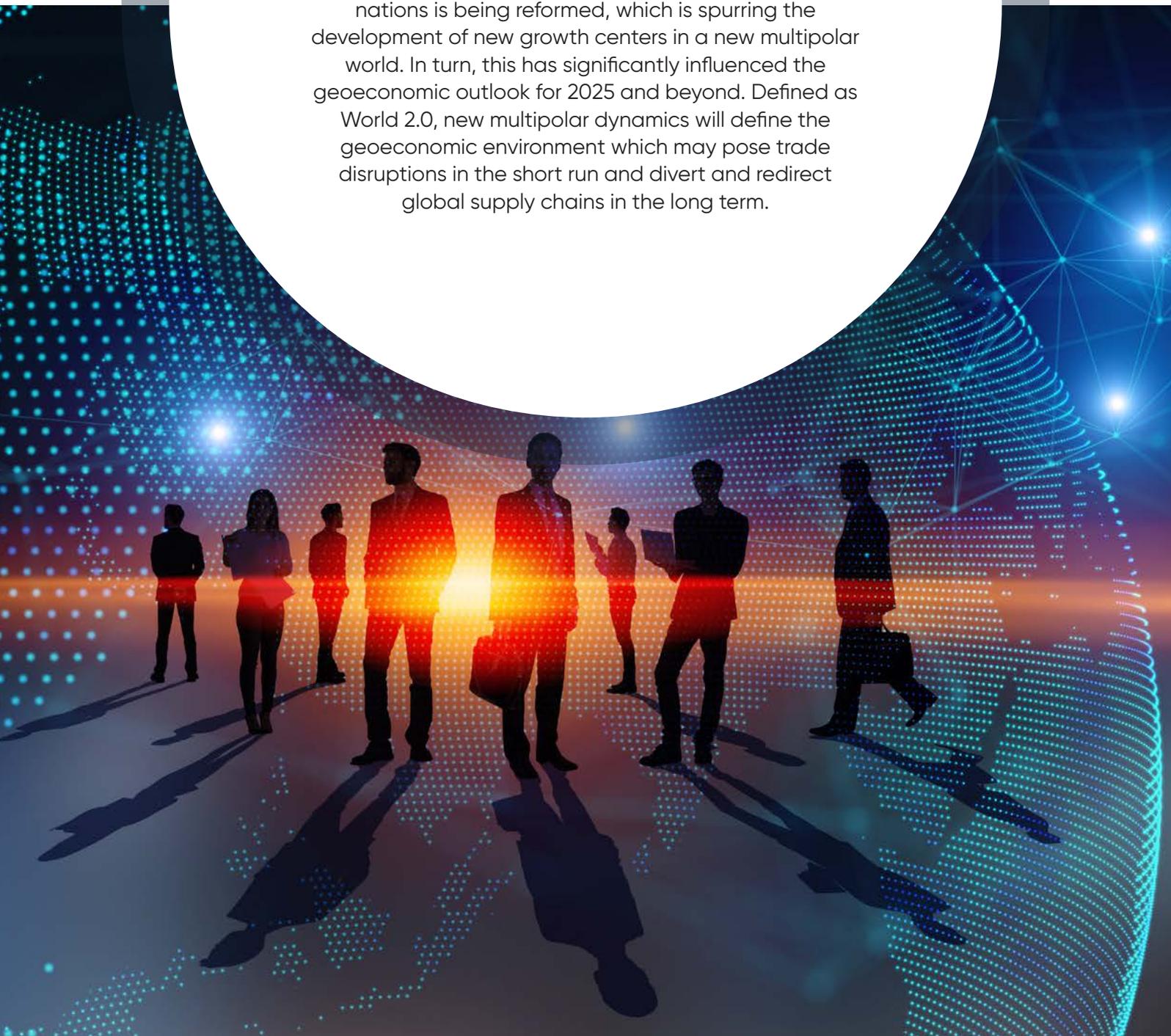
Key Recommendations

- Establish a Global Digital Finance Governance Framework:** India should lead G20, BRICS, and Global South efforts to harmonise standards for Central Bank Digital Currencies (CBDCs), digital payments, cyber-security, and data protection. Embedding interoperability within digital public infrastructure is essential to prevent fragmentation, ensure trust, and enable seamless cross-border financial integration.
- Expand Blended Finance and Private Capital Mobilisation:** Governments and multilateral development banks should design blended finance instruments to crowd in private capital for renewable energy, digital infrastructure, green hydrogen, and SME lending. Mutual reliance frameworks among MDBs can reduce duplication, speed approvals, and improve capital efficiency.
- Enhance Fiscal Sustainability and Balanced Growth Investment:** State governments shall balance welfare commitments with sustained investment in productivity-enhancing sectors, such as, agriculture, logistics, energy, skills, and industrial capacity. This approach will strengthen revenue bases, reduce debt vulnerability, and support long-term, inclusive economic growth.
- Scale South-South Financial Integration:** India should look to replicate the India-Mauritius INR-MUR settlement model across Africa and ASEAN. Such mechanisms can reduce reliance on external currencies, lower transaction costs, strengthen regional trade linkages, and build resilient, autonomous financial and capital flow systems.



Track VI – Geoeconomic Framework

As mentioned before, the global geoeconomic framework that governs commercial flows between nations is being reformed, which is spurring the development of new growth centers in a new multipolar world. In turn, this has significantly influenced the geoeconomic outlook for 2025 and beyond. Defined as World 2.0, new multipolar dynamics will define the geoeconomic environment which may pose trade disruptions in the short run and divert and redirect global supply chains in the long term.





Securing Economic Interests in a Multi-Polar World

Keynote Address

Mr Payyavula Keshav

*Hon'ble Minister of Finance
Planning, Commercial Taxes
and Legislative Affairs
Government of Andhra Pradesh*

Panellists

Mr Richard Rossow

*Senior Adviser and Chair on India
and Emerging Asia Economics
Center for Strategic & International
Studies, United States*

Dr Massimo Geloso Grosso

*Head of Department
Organisation for Economic
Cooperation and Development
(OECD)*

Mr Vinay Bantu

*President & COO
Global Economist
United States*

Moderated by

Mr P Ravichandran

*Deputy Chairman
CII Southern Region and President
Danfoss Industries Pvt Ltd*

Key Highlights of the Discussion

- The session began with a clear and compelling message that the world is no longer shaped by a handful of dominant powers, but by a rapidly evolving constellation of economic centres that are redefining global trade, technology, security, and strategic influence. The session set out to explore how India and states such as Andhra Pradesh can navigate this complexity and translate global shifts into competitive advantage.
- One of the strongest themes running through the discussion was the rising vulnerability of global supply chains. The pandemic exposed how heavily countries had come to depend on single manufacturing hubs for critical products ranging from medical supplies to defence components. These disruptions made it clear that over-reliance on one geography can compromise national resilience.
- The panel also noted that the world is now contending with a period of escalating policy uncertainty, driven by protectionist measures, unilateral tariffs and geopolitical tensions. Even a modest 10% decline in global trade, the speakers emphasised, could lead to significant GDP losses across both advanced and emerging markets. At the same time, the belief that shifting manufacturing back to home countries as a solution was challenged, as such reshoring could shrink global GDP by up to 5%, making it an impractical and costly response.
- The session then turned to the growing security challenges linked to technology imports and advanced digital systems. The example of “kill switches” discovered in electric buses abroad illustrated how imported technologies can carry hidden risks that compromise safety and sovereignty.
- The speakers agreed that consumers and companies are rarely willing to pay more for secure, high-quality alternatives unless governments clearly explain the national-security implications or enforce protective regulations. This debate expanded into a larger point about safeguarding intellectual property, managing technology transfer carefully, and ensuring that strategic industries do not become dependent on vulnerable global supply chains.
- Within this global context, the session devoted considerable attention to the role of Indian states, particularly Andhra Pradesh, in advancing national economic security. Improved governance, a renewed focus on infrastructure expansion and proactive interaction with international investors were identified as major drivers of Andhra Pradesh’s economic revival. Recent multi-billion-dollar investments, including significant FDI inflows, were seen as evidence of restored credibility and investor trust.
- The state’s expanding partnerships with Gulf markets, East Asia and global technology ecosystems were described as transformative for supply-chain integration, market access and technology collaboration.
- In conclusion, the session reinforced the idea that economic security in a multipolar world cannot be achieved through reactive measures. With proactive leadership and a clear long-term vision, states like Andhra Pradesh are poised to play a vital role in helping India navigate and thrive in this new global economic order.

Key Recommendations

- Build Secure and Diverse Supply Chains Through Trusted Geographies:** Countries must reduce dependency on single-source suppliers by developing multi-country sourcing networks anchored in trusted partners. India should prioritise supply-chain diversification with the Gulf, East Asia, Africa, and Latin America, while establishing national technology-trust and certification frameworks to screen high-risk imports, especially in critical technologies such as semiconductors, EV systems, telecom, and defence components.
- Treat Innovation and R&D as Core Economic Infrastructure:** Governments should substantially scale public and private R&D investment, modernise university research systems, and incentivise deep-tech development. India must raise R&D spending beyond 1.5% of GDP, expand digital public infrastructure across sectors, and create innovation corridors that embed AI, robotics, and clean-tech solutions directly into industrial growth.
- Strengthen Geo-Economic Diplomacy Through Standards, Data Governance and Digital Trade Rules:** To avoid fragmentation, countries need interoperable rules for AI ethics, data flows, carbon markets, and digital trade. India should lead coalitions within G20, IPEF, BRICS, and the Global South to shape global norms that protect economic autonomy while enabling seamless cross-border collaboration in emerging technologies.
- Build State-Level Geo-Economic Capabilities to Complement National Strategy:** India should empower states like Andhra Pradesh to build integrated industrial corridors, port-led export hubs, semiconductor-compatible infrastructure, and renewable-energy ecosystems. Strengthening state capacity in logistics, certification, and technology security will create resilient production bases aligned with national geo-economic priorities.



Track VII – Inclusion

Despite progress made over the past few decades, global leadership needs to promote intentional inclusive development to incorporate marginalized groups and increase their participation in the global economic system. Increasing the participation of women in the global economic system remains a significant priority of inclusive international development, which will shape the shape the future of employment, education, employability, and entrepreneurship.

Businesses play a significant role in promoting corporate actions to increase the inclusivity of their firms and their industries, which may be carried out through dedicated programs that increase mobility for underserved communities, particularly in countries like India. One potential path that industries and governments that countries like India and their partners could take is promoting skill development to uplift and upskill workers into higher value industries. Moreover, by supporting startups, governments could provide new avenues and industries to employ people across backgrounds, which would increase the quality of livelihood for these people.





AI and the Future of Jobs: Turning Disruption into Opportunity

Keynote Address

Mr Nara Lokesh

*Hon'ble Minister for
Human Resources Development;
IT Electronics & Communication; RTG
Government of Andhra Pradesh*

Special Address [Virtual]

Ms Debjani Ghosh

*Distinguished Fellow
NITI Aayog and Chief Architect
NITI Frontier Tech Hub*

Speakers

Prof Soumitra Dutta

*President, Portulans Institute
and Former Dean
University of Oxford and Cornell*

Mr Jeremy Jurgens

*Managing Director
World Economic Forum*

Mr Joe Depa

*Global Chief Innovation Officer
Ernst & Young
USA*

Ms Sharon Buteau

*Executive Director, LEAD
Krea University*

Moderated by

Mr Rajiv Memani

*President
Confederation of Indian Industry (CII)*

Key Highlights of the Discussion

- The deliberations centred on how AI is reshaping work, productivity and organisational systems, and how India and in particular Andhra Pradesh could prepare for this transition. At the outset, the panel made the observation that AI has rapidly moved from the stage of experimentation to real-world application across industries. This shift has placed technology at the centre of conversations on the future of jobs, productivity and economic competitiveness. With Andhra Pradesh strengthening its digital infrastructure, including the announcement of investment for a major new data centre, the state is positioned to engage proactively with these changes.
- The panel highlighted that AI should be viewed as a tool that enhances human capability rather than replacing it. Much of the public debate on this subject tends to point to job displacement, yet evidence increasingly shows that AI supports workers by improving the accuracy of work, while reducing repetitive tasks and enabling better decisions. This reframing positions AI as a co-pilot that works alongside people. When integrated thoughtfully, AI can increase the quality of work and free employees to focus on higher-value tasks that require judgment, creativity or complex reasoning.
- A central theme of the session was the need to redesign tasks and workflows. AI makes it possible to reimagine how work is organised by shifting routine activities to automated systems and reserving human time for specialised functions. This redesign has the potential to raise productivity significantly, allowing organisations to operate faster and scale more efficiently. The idea of an “AI productivity dividend” was cited to describe the cumulative gains that come from this shift. These gains can strengthen competitiveness across sectors, such as services, manufacturing, retail, finance and public systems.
- Skilling emerged as a national priority. With demand growing for digital literacy, data understanding, analytical thinking and adaptive problem-solving, India must strengthen collaboration between industry and academic institutions. The discussion recognised that India’s young workforce, combined with the ability to absorb new technologies, rapidly provides an advantage. If supported by well-designed training pathways and early exposure to practical use cases, the workforce can adapt to new forms of work created through AI.
- The session also highlighted that India’s digital infrastructure gives it an opportunity to position itself as a global leader in AI-enabled productivity. High levels of smartphone penetration, widespread digital payments usage and rapid adoption of online services indicate that the country is well-prepared for AI integration. For Andhra Pradesh, investments in data infrastructure, digital governance and emerging technology projects provide a strong foundation for aligning talent development with future requirements.

- The session concluded with the release of the CII - EY report on agentic AI and enterprise readiness. The report was introduced as a timely resource for companies seeking practical guidance on how to move from testing AI tools to adopting them at scale. It offers insights into enterprise usage patterns, readiness indicators and opportunities for accelerating transformation. The release marked a forward-looking end to the session, reinforcing the need for coordinated action between government, industry and institutions to ensure that AI becomes a driver of inclusive and sustained growth.



Key Recommendations

- **Create Large Scale, Continuous Skilling Pathways:** Develop modular training programs that allow workers to upskill in short cycles, focusing on analytical reasoning, data interaction, domain knowledge and socio emotional capabilities.
- **Strengthen AI Readiness Across Education Systems:** Integrate computational thinking, problem solving and digital fluency into school and higher education curricula to prepare future workers for AI augmented roles.
- **Support Workforce Transitions In High Automation Sectors:** Design structured pathways that help workers move from routine tasks to higher value roles through targeted reskilling and employer supported mobility.
- **Expand Inclusive Digital Work Opportunities:** Encourage platforms and enterprises that create remote, flexible and skills based jobs for women, rural workers and individuals with limited prior access to formal employment.
- **Promote Responsible and Transparent AI Adoption In Enterprises:** Create guidelines for ethical deployment, worker protection, data governance and fair use of AI systems within organisations.
- **Build a Coordinated National Framework for AI And Jobs:** Establish integrated labour market mapping, sector readiness assessments and policy mechanisms that align industry needs, workforce capacity and technological adoption.



Investing from Abroad: How NRT's can partner for Viksit Bharat 2047

Session Chair

Mr Kondapalli Srinivas

Hon'ble Minister of MSME
SERP NRI, Empowerment & Relations
Government of Andhra Pradesh

Mr Surya Bezawada

Secretary
Canada South India Chamber of
Commerce

Ms Sundari R Pisupati

Co-Managing Partner
Tempus Law Associates

Moderated by

Mr Surapaneni Subhakar Rao

Chairman
Champions Group

Speakers

Mr Kanuri Seshu Babu

Director – Investments
APNRT Society

Mr Radha Krishna Ravi

Chairman
MJC Constructions

Dr VBSS Koteswara Rao

CEO
Global Exim Institute

Dr Ravi Vemuri

Chairman
APNRTs

Key Highlights of the Discussion

- The discussion reflected on how the global Telugu Diaspora can become a much stronger force in shaping the future of Andhra Pradesh. Panellists noted that nearly 3.5 million non-resident Telugus live across more than 140 countries, forming a community known for its professional success and global presence.
- The session emphasised that this success story represents not just financial potential but years of talent development, resilience and exposure to world-class systems. The state now hopes to build deeper, more structured partnerships that allow this global capacity to directly support development at home.
- A key pillar of the conversation was the Andhra Pradesh Non-Resident Telugu Society, which has grown into an important support network for citizens living abroad. For workers in the Gulf and Middle East, the Society acts as a protective bridge, helping them find reliable employers, resolving disputes and offering assistance in difficult situations.
- For those residing in Western countries, it provides help with documentation, legal issues, property matters and welfare concerns that often become complicated without trusted guidance. The Society also manages philanthropic contributions by ensuring that donations reach schools and public institutions through transparent district-level systems.
- Exports emerged as a major opportunity for deeper engagement. Andhra Pradesh exported goods worth USD 20.7 billion last year, recording a steady increase. Panellists described how each district contributes to this performance. North Andhra exports cashew, coffee, minerals and engineering goods. East Godavari supplies a wide range of agricultural and marine products. West Godavari leads in aquaculture and coir. Guntur is known for spices, and Prakasam for granite and textiles. Nellore and Chittoor export large quantities of rice, groundnut, banana and mango pulp. Minerals such as granite, limestone and feldspar remain a strong part of export activity. Panellists noted that these diverse strengths create direct opportunities for Diaspora-led import and export ventures, especially in agricultural and processed food segments where global demand continues to grow.
- The discussion also touched on legal and regulatory clarity. Many non-resident investors remain unsure about foreign investment rules, taxation, compliance and dispute resolution. Panellists recommended targeted awareness programmes to help diaspora investors make informed decisions. They said that faster commercial dispute resolution and clearer guidance on joint ventures would significantly increase confidence.

Key Recommendations

- Build a Structured Diaspora Partnership Framework:** Create a clear and predictable architecture that enables overseas professionals to contribute through investment, mentorship, sectoral collaboration and knowledge transfer.
- Recognise Global Professional Experience in Project Qualifications:** Adopt equivalency norms for international experience and simplify tender processes so diaspora-owned companies can participate confidently in large projects.
- Strengthen Export-oriented Engagement:** Establish dedicated export facilitation channels that connect diaspora buyers with district-level producer networks and certified exporters across agricultural, marine, mineral and processed segments.
- Accelerate Infrastructure Readiness in Tier-2 Cities:** Prioritise high-speed connectivity, stable power, Grade-A office space and data availability so that advanced engineering, digital platforms and GCCs can expand into emerging urban centres.
- Enhance Confidence Through Legal And Regulatory Awareness:** Organise targeted sessions on investment rules, repatriation, taxation, compliance and dispute mechanisms to reduce apprehension and support informed decision making.





Gender-Responsive Innovation: Building Inclusive Futures

Special Address

Ms Gummadi Sandhya Rani
*Hon'ble Minister of
Women and Child Welfare
Government of Andhra Pradesh*

Speakers

Dr Rayapati Sailaja
*Chairperson
Andhra Pradesh State
Women's Commission*

Ms Sharon Buteau
*Executive Director
LEAD at Krea University*

Moderated by

Ms Mihaela Gjorcheva
*Founder and CEO
Kinoverzum, North Macedonia
North Macedonia*

Mr Murali Krishna Gannamani
*Chairman
CII Andhra Pradesh and Founder & CEO
Fluentgrid Ltd*

Key Highlights of the Discussion

- The session focused on how gender responsive innovation can strengthen the social and economic foundations of Andhra Pradesh. Panellists observed that the conversation around women's advancement in the state is moving beyond welfare to systems that expand participation, create opportunity and support long term growth. The discussion opened by noting that women are increasingly occupying key spaces in education, public institutions, industry and digital environments, reflecting a wider shift in how development is being approached.
- In this context, Andhra Pradesh government is a highly enabling environment for women to participate more confidently in the economic and social spectrum. This is not limited to traditional schemes but includes efforts to improve women's mobility, safety, skills and access to services. For instance, the Sakhi Suraksha initiative of the state government focuses on the wellbeing of women through promotion of self-help groups, and the Stree Shakti travel programme that enables free transport for women,

girls and transgender persons in the state's bus network. These initiatives were described as important because they remove everyday barriers and help women access opportunities more independently. The state government is aligning these programmes with broader goals of digital transformation and infrastructure development so that women are included in the overall growth trajectory.

- The panellists pointed out that gender responsive thinking contributes to innovation ecosystems. Innovation becomes stronger when diverse perspectives are included in the process of design, testing and implementation. Including women in leadership roles enables institutions to better understand user needs and design solutions that work for wider sections of society. It was pointed out that when women participate more fully in innovation and enterprise, it expands the supply of talent and supports a more resilient economy.
- It is imperative to establish a deep collaboration between government, industry and community level

organisations. Panellists noted that while policy can set direction, real progress requires participation from all parts of society. They spoke about the importance of partnerships that help women access skills, markets, finance and digital tools. They also underlined the need to build local ecosystems that can support women led enterprises and help them scale capabilities in sectors such as services, manufacturing and digital solutions.

- The session concluded with a wider view on the future of women's participation in Andhra Pradesh. Panellists expressed confidence that the state's ongoing reforms have created a strong foundation for inclusive growth. The direction being taken is not only about improving current outcomes but also about preparing the state for long term transformation. With efforts focused on mobility, safety, health, skills and innovation, women are positioned to play a greater role in economic and social leadership. The discussion affirmed that gender responsive innovation is not a separate agenda but an essential pillar for building a more equitable and future ready Andhra Pradesh.

Key Recommendations

- **Expand Digital Access and Capability Building:** Strengthen smartphone access, digital literacy, community based coaching and handholding so women can participate confidently in digital platforms, online markets and technology enabled work.
- **Integrate Gender Perspectives into Emerging Technology Policies:** Embed gender assessments, inclusive curriculum updates, and safeguards into AI, robotics and digital governance frameworks to ensure women benefit from modernisation.
- **Strengthen Enterprise Support Systems for Women-led Businesses:** Provide targeted access to credit, digital tools, supply chain linkages and structured industry partnerships to enable women entrepreneurs to scale across both rural and urban markets.
- **Build Safe, Flexible and Inclusive Work Environments:** Introduce strong workplace standards covering safety, parental leave, flexibility and child care support to enable higher retention and advancement of women in technology and industry.



Reskilling for a New World

Special Address

H. E. Mr Penn Sovicheat

*Vice Minister
Ministry of Commerce
Cambodia*

Mr Kona Sasidhar

*Secretary to Government
Higher Education Department
Government of Andhra Pradesh*

Panellists

Mr Evgeny Konev

*CEO, Spicy Rocket
Russia*

Dr Rodney Riviere

*Cluster Coordinator Private Sector
Development Skilling and TVET, GIZ*

Mr Sribharat Mathukumilli

*President, Gandhi Institute of
Technology and Management*

Mr Jitendra Thethi

*Vice President
Cyient*

Mr Narendra Kumar Saranam

*Executive Director
Apex Solutions Limited*

Moderated by

Mr Shivkumar Gunturu

*Chief Executive Officer
Maple Software Pvt Ltd*

Key Highlights of the Discussion

- The panel discussed the necessity of reskilling as a lifelong process rather than a one-time intervention, necessary for ensuring employability, agility and inclusivity. Creating new skills and learning systems that evolve at the same pace as technology, such as AI and robotics, was seen as imperative. Skilling, reskilling and upskilling were identified as necessary for progress. Reskilling was seen as a tool for building resilience and enabling individuals to thrive in a world where technology amplifies human potential rather than replacing it.
- Speakers drew attention to reskilling initiatives taken up by the CII, including the CII Model Career Centre and CII Multi-Skill Training Institutes, which have skilled up to one million students. Increasing international mobility, preparing students for employment and supporting various national and state government initiatives to promote skilling were identified as some of the areas of focus of these initiatives.
- The panel discussed the rapidly evolving nature of technology, drawing attention to the large number of jobs that will face disruption by 2030 due to these transformations. In this context, reskilling was seen as imperative, as well as equipping workers to deal with constant change. Replacing old skills, aligning training to international standards and developing adaptive problem-solving skills among the workforce were highlighted as key focuses.
- The panel discussed concerns about the current Indian educational system, wherein students graduate lacking adequate knowledge and skills due to an overly-intensive focus on preparation for standardised tests. Hands-on learning and the value of experience were highlighted, with panellists suggesting activities outside the classroom to foster this development.
- Speakers also called for a change in mindset on the side of industry, advising companies to give a fair chance to all graduates rather than disqualifying them from application processes because of their academic performances or through arbitrary filters. Increased cooperation between industries and universities was advised, with the panel emphasising upon the need for industrial support to universities to produce graduates who fit the needs of companies.
- Regional cooperation in South-East Asia to share knowledge, align qualifications and create pathways for mobility was seen as essential. Speakers called for India to become a global leader in skilling, digital transformation and world-class information technology.



Key Recommendations

- Continuous Skilling:** Workers must continuously update their skillsets as AI, automation and machine learning are transforming industries. Governments, industry and educational institutions should collaborate to build learning systems that evolve alongside emerging technologies.
- Align Skills Development with Latest Technologies:** India needs dynamic skill-development that keeps pace with advancements in AI and robotics. Reskilling should be used as a tool to enhance resilience so technology empowers, rather than replaces, human potential.
- Pursue International Certifications:** Educational institutions should pursue international certifications and strengthen language proficiency. Incorporating adaptability into early learning is vital. Reducing the emphasis on standardised tests and increasing practical, hands-on experiences will better prepare students for modern workplaces.
- Inclusive Skilling Initiatives:** Parents should model adaptability and continuous learning to encourage similar habits in children. Skilling initiatives must ensure inclusivity so that women and vulnerable groups can participate in economic growth.
- Industry Should Reassess Hiring Practices and Avoid Excluding Candidates Through Rigid Academic Filters:** Stronger collaboration between universities and companies is necessary to ensure graduates emerge with skills aligned to real industry requirements.





Valedictory

Guest of Honour

Mr N Chandrababu Naidu

*Hon'ble Chief Minister of
Andhra Pradesh*

Panellists

Mr Rajiv Memani

*President
Confederation of Indian Industry (CII)
and Chairman & CEO, EY India*

Ms Jodi McKay

*Director
Australia-India CEO Forum
Business Council of Australia*

Dr (Ms) Suchitra K Ella

*Vice President
Confederation of Indian Industry (CII)
and Managing Director
Bharat Biotech International Ltd*

H E Mr Todd McClay

*Minister for Trade and Investment
Minister for Agriculture and
Forestry and Associate
Minister for Foreign Affairs
New Zealand*

Dr Rodney Riviere

*Cluster Coordinator
Private Sector Development-
Skilling and TVET, GIZ*

Mr Richard Rossow

*Senior Adviser & Chair on India
& Emerging Asia Economics
Center for Strategic &
International Studies
United States*

Ms Edith N. Nordmann

*Chairperson for Netherlands
India Chamber of
Commerce and Trade
(NICCT)*

Moderated by

Mr Chandrajit Banerjee

*Director General
Confederation of Indian Industry (CII)*

Key Highlights of the Discussion

- The valedictory session of the 30th Partnership Summit concluded two days of high-level dialogue, global engagement, and exchange of transformative ideas. Speakers highlighted that Andhra Pradesh has showcased itself as a state ready for significant global investments, equipped with clarity of vision, administrative agility, and a deep commitment to collaboration.
 - Hon'ble Chief Minister's leadership was consistently described as both visionary and execution-focused, instilling confidence among international governments and businesses. Delegates agreed that this combination of strategic foresight and on-ground delivery has positioned the state as a serious contender in the global investment landscape.
 - A key theme that emerged throughout the session was Andhra Pradesh's rise as an innovation-driven, fast-moving, and policy-responsive state.
 - The session opened with structured feedback from Germany, which underscored that its engagement with Andhra Pradesh is both longstanding and expanding. The German delegation noted that GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit) is already implementing 7-8 ongoing projects across areas, such as agro-ecology, renewable energy, and capacity building. These initiatives support India's broader target of achieving 500 GW of non-fossil fuel energy, with Andhra Pradesh's own ambition of 160 GW positioning it as a pivotal partner in India's green transition.
- The delegation appreciated the Partnership Summit serving as a powerful platform bringing together business, government, and development agencies, with added focus on the green economy.
- The Netherlands added a complementary perspective by emphasising Andhra Pradesh's unique combination of ease and speed of doing business. It was stated that European investors see significant opportunities in the state, driven not just by its natural advantages, such as coastal access and industrial corridors, but also by its proactive governance culture.
 - Australia's intervention placed the Summit in the broader context of Australia-India economic cooperation, particularly as both nations work toward the second phase of their bilateral free trade agreement. The Australian delegation stressed that the B2B and B2G connections built during the Summit will play a direct role in advancing these negotiations. While appreciating the state's scenic coastline, they emphasised Andhra Pradesh's economic vitality and the strong appetite for progress, describing it as a strategic partner for Australia in emerging sectors.
 - New Zealand reinforced the global stature of the summit by noting that nearly 19 trade ministers from across the world were in attendance. The visiting minister praised the state's hospitality and highlighted the importance of such platforms at a time of complex geopolitical shifts. For New Zealand, ongoing FTA negotiations with India gain depth and relevance through

the business-to-business engagement facilitated by events like this. He noted that Andhra Pradesh's openness and warmth would accelerate future cooperation.

- The United States offered a reflective perspective, drawing on decades of collaboration with Andhra Pradesh. There were recollections of Hon'ble Chief Minister's early leadership in driving unified Andhra Pradesh's digital transformation in the late 1990s and how that vision laid the groundwork for Hyderabad's emergence as a global IT hub. That is also reflected in the state's present trajectory and the commitment to technology, transparency, and forward-looking governance.
- Across all interventions, three unifying messages emerged. First, that meaningful partnerships across governments, businesses, and institutions were the cornerstone of the Summit's success. Second, Andhra Pradesh has demonstrated how strong state leadership can significantly influence global

economic relationships. And third, the Summit showcased a shared commitment to addressing global goals such as climate resilience, renewable energy, skill development, and sustainable economic growth.

- Over two days of the Summit, Visakhapatnam hosted more than 3,000 delegates, including more than 600 international participants, and representatives from 62 countries. With 46 sessions and over 1,500 B2B meetings, the Summit evolved far beyond traditional investment discussions, becoming a platform for exchanging global ideas, strengthening cultural understanding, and deepening government-business partnerships.
- The Valedictory session carried a clear sense of optimism and direction. Delegates departed with renewed confidence in Andhra Pradesh as a partner of choice and with a shared commitment to deepening strategic collaborations that will shape the future of regional and global development.



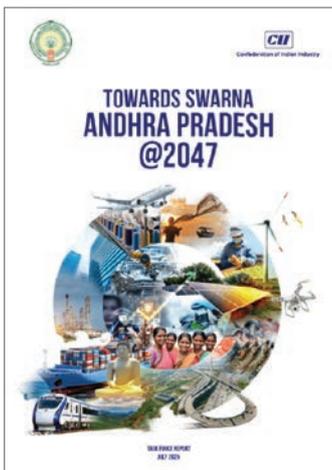
Key Recommendations

- Institutionalise the “Andhra Framework” for global partnership facilitation: Create a structured global partnership mechanism with defined timelines, single-window execution, and dedicated country desks to sustain momentum from the summit. A formalised partnership council with industry, academia, and government can track progress and accelerate implementation of MoUs and investments.
- Develop Sector-focused International Collaboration Platforms: Build focused bilateral working groups in areas like renewable energy, advanced manufacturing, skills, mobility, and digital governance with Germany, Australia, the Netherlands, the United States, and New Zealand. These groups should drive joint projects, innovation pilots, and investment corridors aligned with state priorities.
- Strengthen State Diplomacy and Global Outreach Strategy: Establish a global outreach blueprint positioning Andhra Pradesh as a preferred investment hub. Expand international engagement through trade missions, investment roadshows, and participation in global economic forums to sustain visibility and investor confidence.
- Create an Integrated Investment Acceleration Facility: Develop an outcome-based facilitation platform offering fast-track clearances, structured incentives, coordinated logistics support, and post-approval monitoring. Linking this mechanism to cluster development will enable quick conversion of expressed interest into tangible commitments and job creation.



Publications released at Partnership Summit 2025

Andhra Pradesh Task Force Report - 'Towards Swarna Andhra Pradesh@2047'



India's States play a crucial role in the country's growth path by leveraging their unique regional strengths. The path to "Viksit Bharat" by 2047, therefore, is built upon the foundation of "strong states make a strong

nation", giving way to a more heterogeneous approach towards development.

In this context, a CII – Government of Andhra Pradesh Taskforce on Economic Development for Swarna Andhra Pradesh @ 2047 was formed with Shri N. Chandrababu Naidu, Hon'ble Chief Minister Andhra Pradesh as the Chair and Mr. N Chandrasekaran, Executive Chairman, Tata Sons, as the Co-Chair. The taskforce submitted its report to the hon'ble Chief Minister on 16th July 2025 in New Delhi.

The aim of the taskforce was to outline a roadmap to drive growth, attract investments, and position Andhra Pradesh as a leader in economic advancement by 2047. In line with the state government's growth vision called– 'Swarna Andhra @ 2047', the

taskforce projected that the State's economy could witness a 14-fold increase to USD 2.4 trillion by 2047.

With the aim of designing a holistic development strategy, the taskforce report also looked at the district-wise decomposition of Andhra Pradesh's GSDP (Gross State Domestic Product). The top 15 districts are Visakhapatnam, NTR, Tirupati, Krishna, Eluru, SPS Nellore, Guntur, Anantapuram, Kakinada, West Godavari, East Godavari, Y.S.R, Sri Sathyasai, Anakapalli and Prakasam. Assuming a similar contribution of districts' GDDP to the state's GSDP, these districts would contribute nearly USD 1.7 trillion to the state's overall target of USD 2.4 trillion in 2047 (~72%).

The report decomposed the growth potential of the state in two main brackets – 1) Drivers - identified by an intersection of sectors in which the state has comparative advantages and the ones which have immense opportunities to be capitalized and 2) Enablers of Growth - areas critical for the sustainability of that growth.

Andhra Pradesh has immense potential in sectors like IT, electronics, automobiles, logistics, renewable energy, semiconductors, pharmaceuticals, defence among others. Besides the state's robust agricultural sector,

already a leading performer, has significant potential to enhance productivity and become a major supplier of food products globally. Simultaneously, the taskforce recognized the need to facilitate the right ecosystem and support for futuristic segments of industry, including Biotechnology, advanced manufacturing, Blue Economy, Electric Vehicles, etc. The aim is to transform Andhra Pradesh into a hub of next-gen technologies.

In terms of enablers, human capital development and inclusive growth are the focal points of the taskforce report. The other being skill development, which is crucial to

ensure adaptability and productivity enhancement of the workforce amidst ongoing technological disruptions.

On balance, the taskforce is of the view that the state of Andhra Pradesh stands at the forefront of India's economic resurgence and is set to play a pivotal role in achieving India's target of being a developed nation by 2047. In this endeavor, the taskforce report's recommendations are likely to play an important role in initiating and provoking thoughts around the strategies and framework that are required to accomplish the goal of a "Swarna Andhra".

Brief on session: AI and the Future of Jobs - Turning Disruption into Opportunity



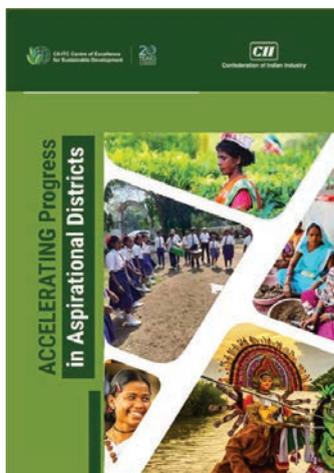
significant attention. The report, unveiled amidst the discussions, explores India's preparedness to harness the transformative potential of advanced AI technologies.

During the session on "AI and the Future of Jobs: Turning Disruption into Opportunity" at the 30th Partnership Summit, the launch of the CII-EY report titled "AI: Is India ready for Agentic AI?" garnered

Agentic AI promises to provide an infinite cohort of zero cost digital workers who will change the way we do business.

This report highlights that 47 percent of Indian enterprises now have multiple AI use cases in production, and three out of four business leaders see AI as critical to their organisation's future. The report also notes that India is leading the world in the development of Small Language Models that are faster, cost-effective, and better suited to India's multilingual and compliance-driven environment. It stresses that the rise of Agentic AI could redefine work itself, turning AI into an infinite digital workforce that complements human creativity and judgement.

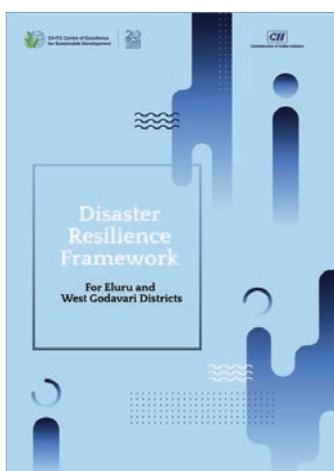
Compendium on Accelerating Progress in Aspirational Districts



The Compendium showcases 20 impactful CSR case studies undertaken by Indian industry across various sectors in Aspirational Districts. These initiatives span diverse areas, including innovative healthcare, skill development, sustainable livelihoods, education, water resource management, and rural electrification, all

contributing to inclusive growth and the achievement of the SDGs. The implementation approach relied on collaborative partnerships with government agencies and NGOs, which helped strengthen outcomes despite challenges such as infrastructure gaps, connectivity limitations, complex administrative procedures, and community engagement barriers. The study indicates that sustained progress will require integrated strategies, stronger community ownership, regulatory simplification, and enhanced multi-stakeholder collaboration to ensure that no district or citizen is left behind.

Disaster Resilience Framework for Eluru and West Godavari districts, Andhra Pradesh



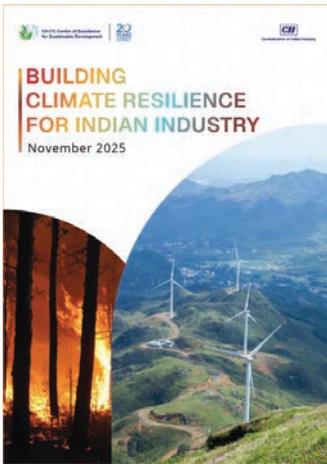
Both districts face recurring challenges from seasonal floods and cyclones, compounded by infrastructural gaps, socio-economic

This study synthesises key findings and actionable recommendations for strengthening Disaster Risk Reduction (DRR) and enhancing resilience in the districts of Eluru and West Godavari, Andhra Pradesh.

vulnerabilities, and environmental degradation. The analysis draws on on-ground consultations, government inputs, and community insights.

The report recommends conducting comprehensive hazard, risk, and vulnerability assessments at the district level. Stakeholder feedback suggests that effective implementation will require investments in data infrastructure, improved early-warning systems, and structural retrofitting. The policy environment can be further strengthened to build long-term resilience. To address residual risks, the study highlights the need for robust risk-transfer mechanisms, community training programmes, and stronger inter-agency coordination.

Building Climate Resilience for Indian Industry



As industries face mounting threats to everyday operations and business continuity due to climate change, adaptation has become a strategic imperative for long-term sustainability and profitability. To support the integration of physical risk assessments and

adaptation measures into core business operations, a “Physical Climate Risk Assessment Framework (PCRAF)” was developed as a unified tool, drawing on the IPCC AR5 framework and applied across three sectors in three Indian states. The tool generates site-level climate risk scores and provides sector-specific recommendations for adaptation actions. Designed to align with regional and sectoral contexts, PCRAF enables resilient infrastructure planning and more informed investment decisions, thereby strengthening overall climate resilience.

Assessing the Impact of ESG Standards Alignment on Sustainable Finance in India



Over the past decade, sustainable finance has shifted from a niche idea to a core component of global capital markets, with ESG-linked investments expected to surpass USD 40 trillion by 2030. As investors increasingly integrate ESG considerations into decision-making, consistent and comparable disclosures have become essential for directing capital toward sustainable growth.

In India, SEBI’s Business Responsibility and Sustainability Report (BRSR) and BRSR Core mark significant steps toward a unified disclosure framework, though alignment with global standards such as IFRS S1 and S2 remains limited. This report evaluates the degree of convergence between BRSR and IFRS, identifies key gaps, and offers targeted recommendations. The analysis draws on a structured gap assessment, global best practices, and stakeholder consultations to propose enhancements that improve materiality, sector specificity, and overall decision-usefulness of ESG disclosures in India.



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 organisation, with around 9,700 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 365,000 enterprises from 318 national and regional sectoral industry bodies.

For 130 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 the Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness, and business opportunities for industry through a range of specialised services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Through its dedicated Centres of Excellence and Industry competitiveness initiatives, promotion of innovation and technology adoption, and partnerships for sustainability, CII plays a transformative part in shaping the future of the nation. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes across diverse domains, including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

For 2025-26, CII has identified "Accelerating Competitiveness: Globalisation, Inclusivity, Sustainability, Trust" as its theme, prioritising five key pillars. During the year, CII will align its initiatives to drive strategic action aimed at enhancing India's competitiveness by promoting global engagement, inclusive growth, sustainable practices, and a foundation of trust.

With 70 offices, including 12 Centres of Excellence, in India, and 9 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with about 250 counterpart organisations in almost 100 countries, CII serves as a reference point for Indian industry and the international business community.

Confederation of Indian Industry

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