

MAKE IN INDIA: OPPORTUNITIES AND CHALLENGES- SUPPLY CHAIN MANAGEMENT

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ABSTRACT

The “Make in India” campaign aims to increase the contribution of the manufacturing sector to GDP from 16% to 25% by 2022 & thus provide impetus to the economy. Reports state manufacturing sector would contribute >25% till 2034. The campaign focuses on 25 key areas, across predominant sectors viz. automobile components, chemicals, pharmaceuticals, oil and gas, textiles and garments, and others. It also focuses on service sector comprising of the supply chain, retail, e-commerce, hotels & hospitals to grow from 52% to 60% in the coming years. The logistics industry is thriving in the country post-industrialization and still has a lot of ground to cover. Supply Chain is an essential lever for the manufacturing sector to grow. Right from managing the inbound of raw materials to distribution of finished goods, supply chain management has a colossal impact on this sector. Manufacturers, e-commerce, and retailers depend on third party logistics service providers for storage & distribution solutions which are integrated from end to end.

Make in India presents a plethora of opportunities for supply chain management to grow, along with enormous challenges. This paper aims to highlight 3 critical areas for an efficient supply chain. The first one is *Capital in Infrastructure*; India is the 7th largest country in the world and just covers one-third of its network capacity. This warrants investment in infrastructure like road, rail, and waterways. The introduction of GST will help consolidation & increase capacity and efficiency. The assurance of excellent delivery comes with *Capability*; in providing trained and experienced human resource. The major challenge is to retain manpower & hence invest into continuous learning & development. The third critical area is *Compliance*; with growing business needs, adherence to the laws of the land viz. company laws, Labor laws, and environment laws has its significance. Adequate CAPITAL investments coupled with efforts on capability development & compliance will pave the path to effective supply chain management for blooming service and manufacturing sector.

Keywords: Supply chain management, capital, capability, compliance, logistics

OBJECTIVES

The primary objective of the paper is to highlight the significance of an efficient supply chain in the light of various reforms that Indian economy is going through especially Make in India and GST roll out.

Considering both the cause and effect of these initiatives on supply chain the paper also aims to highlight key government initiatives and investments that would eventually boost opportunities in this sector. Further the paper details out three critical aspects of supply chain viz., Capital Capability and Compliance along with the challenges that lie in its implementation and the possible way forward.

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The readers of the paper will have detailed insights on the above and benefit from the research that was conducted for the purpose of this paper.

INTRODUCTION

Indian economy has been steadily growing during the last decade when globally most economies have been experiencing a massive slowdown. India continues to showcase growth due to radical reforms in the last three decades. India's macroeconomic prospects had started taking shape just before the new government was elected & current Prime Minister Mr. Narendra Modi assumed office. The economic policy reforms post Modi government is has brought in a positive sentiment amongst investors. Major indicators of economic activity across the trade clearly indicate that the third largest Asian economy is on a better footing than it was earlier (Analyst, BMI Research); and is being considered amongst the world's strongest economies by World Bank and the International Monetary Fund. India has registered a GDP growth rate of 7.4% post-2014. The current account deficit (CAD) is now standing at 1.3% of GDP which is half of number 3.7% from 2011-12. The present FDI reforms have allowed 100% single-brand investment, which has moved India to the 9th spot for 'attractiveness to foreign investors' list in United Nations Conference on Trade and Development (UNCTAD). Similarly, the ever volatile and high fuel prices have been fairly stable. One of the important and most awaited reforms from the current government has been the announcement of Goods & Service Tax (GST) w.e.f. April 2017. GST will have a widespread impact on almost all the aspects of business operations in the country, for instance, pricing of products & services, supply chain optimization, IT, accounting, and tax compliance systems.

MANUFACTURING SECTOR

One of the growth indicators of any economy is the development of its manufacturing sector. The companies in today's age are looking for offshore production and assemblies which offer them a competitive price advantage. The adaptations that India is going through will attract investments owing to increasing domestic demand and also its capacity to fulfill global requirements. A strong logistics infrastructure comprising of the road, rail, waterways and air network are essential levers for manufacturing industry's steady growth. The logistics sector in India based on latest reports spends an estimated 13% of the GDP which is very high compared to globally developed nations Primary reason of the same being low penetration of third-party logistics service providers (3PLLSP). It has however been growing and evolving with an increase in investments in infrastructure coupled with a paradigm shift in manufacturer's outsourcing behavior.

Manufacturing is one of the core industries globally and a critical contributor to economic development; especially for a developing economy like India. The importance of the same is well complemented by the flagship program - Make in India - a major national initiative designed to facilitate investment; foster innovation; enhance skill development; protect intellectual property, and build best-in-class manufacturing infrastructure.

Today the manufacturing sector contributes 15-16% of the total GDP & the goal is to boost the sector to over 25% by 2022. Make in India focuses on 25 key areas, across predominant sectors viz. automotive, automobile components, chemicals, pharmaceuticals & life sciences, oil and gas & textiles. India presently contributes to approximately 2.2% of the global manufacturing output which is at par with the developed economies of the world such as U.K and France (UNIDO report). There has never been a better time to Make-in-India.

Make in India initiative would provide a platform for the creation of additional jobs to cater to the growing demand in the manufacturing sector. Research indicates that every job created

in the manufacturing sector has a multiplier effect and creates between 2 to 3 jobs in the services sector; both directly and indirectly.

While discussing manufacturing sector, it is imperative to analyze & assess the supply chain management in this sector. Right from managing the inbound of raw materials to distribution of finished goods, supply chain management has a colossal impact. Manufacturers, e-commerce companies, and retailers rely on third-party logistics service providers (3PLSP) for storage and distribution solutions which are integrated from end to end.

CAPITAL

Make in India presents a plethora of opportunities for supply chain management to grow, along with enormous challenges. While there are many critical parameters, one of the most critical levers is **Capital**; India is the 7th largest country in the world (area wise) and yet it covers just one-third of its network capacity. This skewness in the area and network capacity warrants investment in infrastructure like road, rail and waterways. Reforms in every form - be it monetary, legislative or policy will be required to enable the transformation in the infrastructure capability in India.

Existing infrastructure is insufficient to support the expected growth rates of 8 to 10% over the next decade. The government of India has hence rolled out heavy investment in logistics in India in last fiscal budget (2015-16) to the tune of Rs. 70,000 crores. As per the 12th 5-year plan (2012-17), government spends on logistics related infrastructure is estimated to be over 30% of total infrastructure spend in the country.

In addition, **legislative** reforms include corporatization of 12 government run ports, setting up of TRANSLOC (Transport Logistics Corporation of India), proposed development of 30 small multimodal logistic parks and setting up of Port Infrastructure Vikas Nigam Limited (PIVNL) with equity stakes from all 12 major ports of India.

In addition to the announcement of GST w.e.f. April 2017, other **policy** reforms like relaxation of cabotage norms, tax incentives to India flagged vessels, announcement of only 3 document requirement for standard exports / imports, unveiling of new Foreign Trade Policy (FTP), and proposed interest subvention schemes at less than 2% to reduce cost of finance for exporters will play a dominant role in the times to come.

The projected growth in freight traffic is also bound to increase the pressure on India's infrastructure in the years to come. USD 45 billion equivalent to 4.3% of today's GDP is wasted because of poor logistics infrastructure and if the problem is not resolved it could increase to USD 140 billion or more than 5% of the GDP in 2020.

Presently 18.10 million motor vehicles ply on Indian roads, and the average growth rate of vehicular traffic has been 10.16% per annum over the last five years. The traffic is increasing steadily as 65% freight and 80% passengers are carried by the road infrastructure in India. Amongst this, the National Highways constitute a minuscule 1.7% of the road network but carry about 40% of the road traffic. India needs to not only look at the expansion of the road network but also increase its use and reliance on rail and waterways to increase the proficiency of logistics movement in the country. Despite our rail connectivity being the second largest in the world, our freight logistics dependency over railways is very low. Likewise, the waterways contribute to less than 5% of the total freight movement. Transport via airways is a crucial component for efficient and in time logistics movement, and trade traffic was 2.2 million tons in FY 14 and expected to increase by five times till 2032.

There have been various initiatives under development and implementation in the last two decades. The Golden Quadrilateral (GQ) was completed in 2012 and is under lane expansion currently. Another road development initiative under execution is the NSEW (North-South-East-West) corridor and it is 87% complete as of date. It will connect the country on all four

directions will be a further push to the good connectivity of all Tier 1 and Tier 2 cities of the nation.

Some of these key **infrastructure** projects under development are : Sagar Mala (multimodal transport), Integrated National Waterways Transportation Grid, Integrated Port Development Plan, construction of new berths and terminals & modernization, proposed inland feeder ports, development of multi-modal logistics terminals, National Highways Development Project (NHDP), Special Accelerated Road Development Program in North East (SARDP-NE).

Under rail development, Eastern - Western freight rail corridor is under progress and is expected to complete in 2019. Four additional rail corridors are in the planning stage which would cover the GQ. The E-W freight corridor will be able to carry four times the load at 30% faster speed. About a 100 million of cargo is expected to move annually through this network which will be reducing the costs, service quality and increase the fuel efficiency. Logistics parks will also be built along the DFC (Dedicated Freight Corridor) to have a better connectivity of the remotest locations to the ports.

The government is thinking of multimodal transport solutions and is announcing various investments for the infrastructure development in roads, rail, waterways and airways. The Rail-Road Port connectivity is another project underway to improve the evacuation of nine major ports. Sagar Mala (Ocean's Necklace); is a plan to develop ports and transport through waterways and promote shipping. This plan will be concentrating on modernizing ports (instead of the earlier corporatization model), which will enhance their throughput and cargo handling capacity. Globally freight transport through waterways is five times cheaper in comparison to transportation via road. If coastal cities are integrated with inland towns by rivers there would be substantial savings; Indian goods would become competitive in the international market. The proposed reforms and the initiative in progress will exponentially change the way the Indian logistics function. The investment reforms and projects in waterways through the Sagar Mala and the other incidental projects will accelerate the building of port infrastructure; decongest JNPT (in Mumbai) and will lead to development & modernization of alternative ports. This will, in turn, lead to improvement in overall efficiency i.e. pre-berthing & turnaround time, efficient port evacuation would be possible and infrastructure will be available for quick movement of vehicles.

The reforms in rail infrastructure will increase India's freight handling capacity through the emergence of an end to end logistics handling. Transportation via rail will lead to a reduction of damages in handling on long haul routes & improve the time to market typically to remote markets like Eastern part of India.

The rollout of GST is expected to bring in improved governance under single tax regime, consolidation of warehouses leading to a reduction in logistics cost, and will increase the penetration of organized logistics service providers. Currently, each of India's 29 states levy tax on goods that move across their borders at different rates. Consequently, freight movement across the country is taxed multiple times. Long delays at interstate checkpoints, as state authorities review and examine freight and apply the relevant taxes and other levies worsen the transit time. This combined with other delays; keep trucks from moving during 60% of the entire transit time. As 65% of India's freight moves by road logistics experts see GST as very critical for India. Often, tax optimization and administration are considered over the operational and logistics efficiency. With GST implementation, Indian logistics will move from tax driven model to efficiency-driven model.

Manufacturing also is a very competitive industry and reducing the cost of the production while creating incremental value always remains a challenge for every business. GST would lead to lower cost of production and one of the major benefits to the manufacturing industry would be the unrestrictive tax credit with this reform.

GST regime will see the emergence of the organized service providers as consolidation will become a norm in the country & economies of scale will play a major role. Further, the firms in the unorganized sectors, too, would be expected to improve their service levels to participate in the competitive landscape (KPMG report).

We can thus conclude that India is well on track in terms of investments in infrastructure & coming years will see a radical transformation in Indian Logistics landscape. This, in turn, will have a cascading impact on capability development in the country.

CAPABILITY

The assurance of excellent delivery comes with **Capability** which is another significant lever in the supply chain. Human capital is a vital asset in the logistics and supply chain industry. The sector presently employs over 16.74 million employees and is slated to employ more than 28.4 million employees by 2022 (National Skill Development Corporation (NSDC)). Large MNCs coming to India have brought with them best global practices and ideologies in the supply chain industry. The supply chain is a dynamic process in any value chain with every project having its individuality; hence, operations and processes have to be planned & implemented accordingly.

The employment profiles in the supply chain environment can be divided roughly into two general areas – Planning and Operations. Planning involves roles which require inventory control, demand forecasting and handling customer service issues. Operations involve handling port terminals and operations centers, these jobs involve day-to-day management of people and the flow of products in & out of the warehouse and transport operations like long-haul & short-haul trucking and last mile deliveries. The manpower present on the site is one of the crucial elements for optimal performance of the warehouse. However automatized and IT dependent the warehouse might be, it still requires manpower on site to perform efficiently.

Typically hierarchy in supply chain industry consists of three levels: Top management which is Strategic level, Middle management which is Tactical level and Executive which is Operational level. The operational level employees focus on activities like order fulfillment, warehousing activities like inbound put away & outbound picking/packing, re-packaging & other value added services and customer service. The key skills required for these employees are efficiency, prompt response time, direct interaction with the end customers & internal customer orientation, the ability to multi-task, dexterity, commitment, cooperation and team spirit. The top and the middle management employees are primarily involved in the role of forecasting, strategy formulation, handling customer service issues and the formulation of the bundled VAS (Value Added Service) packages. In addition, they also manage, mentor & guide the operational level employees. Along with quantitative and analytical skills, the core competency of knowledge in the basic supply chain management skills, viz. distributions strategies, planning, and procurement are also required.

The manpower at the operational level is broadly classified as skilled, semi-skilled and unskilled. Roles and responsibilities are thereby assigned based on the skill sets & capabilities. Allocation of role varies from site to site basis the requirements of role & availability of resources. As explained above, logistics & supply chain sector has been through a transformation in past few years and the change will continue. While it still does not have the status of an industry in our country, it has been attracting employment across various levels. The employments in the industry hence have been evolving with time. However, we often come across skill gaps in the industry.

There are many reasons for these skill gaps. First & foremost majority of companies operating in this sector are small to medium sized family owned businesses which do not

focus on capability development. Further, the industry is highly fragmented. Research indicates that close to 85% of Indian logistics industry is managed by unorganized players. The approach of short-term investment in manpower coupled with low expectations of customers has led to unavailability of adequate training institutes, lower expectations of the end customers from the service providers with respect to the quality of manpower, poor pay scales, rapidly changing the requirement of skills, improper recruitment, and poor manpower policies.

This short-term investment approach towards manpower in this industry has kept pay scales lower. In addition, poor recruitment strategies have always kept customer expectations on quality of manpower very low. Further, inability to meet training requirements over time has widened the skill gap further.

According to a KPMG survey of the financials of a set of 80 logistics companies in India across sectors reveals that manpower spends comprise 8-10% of overall sales of the sector. This approximately translates to about an INR 500 billion spend on logistics manpower in the country annually. Yet only about 13-14% (globally approximately 20%) of the overall manpower costs is spent on non-salary, manpower development items (welfare, training etc.). The expenditure for unorganized companies would be far lesser for these non-salary items. Small businesses / unorganized companies have poorly trained manpower generally because they simply don't have the resources to find the best and the most qualified candidates & the lower capacity to absorb financial blows in the long run. Hence, this has a cascading effect on the investments for training and development programs implemented in such businesses as the efforts are not focused on up gradation and development of employees but focused on preventative training. The fragmentation of the industry or the unorganized nature makes it highly unattractive to build a career in. Professionals would look forward to opportunities in other sectors where there are greater brand visibility and better career options. Along with the lack of professionals in the top management in the supply chain industry, there is a dearth of highly skilled manpower for the operations in the warehouses and also for transport services. Similarly, there are very few formal logistics/supply chain training institutes in India which run certified courses e.g. ITI course and others run under NCVT MIS, etc. The end customers are also aware of lack of skill sets and processes in the organizations and hence do not expect high deliverance of quality in services. These lower expectations impact the payment for service agreements, which in turn results in lower pay scales for the employees, as the companies want to remain competitive in the market but achieve higher profits. The factors for skill deficit in human resources in the supply chain are intricately linked with each other. Major skill gaps can be controlled with planned guidance and training at all the levels in the supply chain hierarchy. Critical profiles in the value chain in operations are truck drivers, bike riders (last mile deliveries) and loading supervisors/outbound supervisors. The drivers on short & long haul routes and bike riders for last mile deliveries are unaware about defensive driving techniques, loading/unloading and load securing procedures, emergency response procedures and fatigue management. The warehouse managers lack in core technical skills, have inadequate knowledge about health issues, unaware about basic knowledge of safety at workplace, importance of wearing PPE, knowledge of associated issues like VAT. It is hence vital to continuously upgrade the skills and knowledge of these employees engaged in critical profiles to increase productivity and also because they are governed by the statutory laws of the land.

The identification and reduction of skill gaps is a function of the Human Resource Development team in the organization. The department should administer periodic internal surveys to the employees (online / offline), which can specifically measure the existing / acquired versus desired skill sets of the employees deployed on various hierarchical levels in the company.

Research shows that the supervisors and executives managing the warehouse and transport operations lack leadership and supervision skills along with know-how of basic management practices. A large number of these supervisory managers lack in communication skills, whereas they are the middle bridge of communication between the top management and the operations. This leads to employees being conservative in nature and resistant to any kind of change which organizations may want to pursue as a part of their growth journey.

This becomes a series of problems starting with low investments in intellectual involvement at the strategic level, leading to skill gaps at the ends of the service provider and the receiver, which leads to discussions revolving only around costs and how to reduce costs in the best way for the end customer. Efficiencies should be created to reduce wastes and bring a decrease in costs but is very tough given the low investments in the managerial-intellectual capacity. This vicious skill-gap cycle, unless addressed appropriately, works as an impediment to the growth of the logistics sector in India. This would consequently impact growth in industry and manufacturing sectors as well.

While there are various initiatives required to address the skill gap and attract talent in this sector, the primary focus should be on capability development and retention of manpower.

Whilst talking about capability development, training form an integral part of imparting learning to employees in this sector. Training and learning sessions help the employees not only in the acquisition of new skills but also for up gradation of the already acquired / existing skill sets. It doubles up as a tool for employees' development and motivation. At the same time, improper training not only makes employees work harder while producing fewer results, it also hurts their motivation. Hence, it is necessary to plan and invest in continuous and relevant Learning & Development at each and every level in the organization. Identifying appropriate training requirements at every level is in itself a challenging task for organizations.

A key component of imparting training is to identify the preferred learning method viz. classroom, hands-on, computer-based / e-learning and simulation. Simultaneously, the possible barriers to capability development should also be identified to ensure optimal takeaway from the learning sessions. Sharpening of skills invariably results in the growth of productivity of the employees. Training refreshes the employees' old skills and adds new skills which in turn help boost their confidence levels. Confident employees know that they are an essential lever in the organization's functioning and have a greater sense of value and achievement. In the long run, the organizations imbibe a performance-based culture with specific and attainable goals & employees having clearly defined the definition of success. Training ensures employee satisfaction which helps to make an organization a productive workplace.

Suggested training areas could include core technical skills, operations management, material handling, labor, executing mechanized operations, health & safety. Training for middle and senior management could include analytical skills, leadership skills & communication skills. The drivers and bike riders are often left out from training programs, but they are the most significant contributors to the supply chain industry. Their training could include a well-chalked out induction consisting of company policies, rules & regulations, defensive driving, and first aid measures. Journey management training inclusive of fatigue management techniques is a must along with emergency & breakdown procedures training.

Training of people is a continuous cycle & organizations must invest into the same from time to time. Top multinational organizations have realized the importance of capability development and this trend is being widely appreciated across the industry. The results of

these initiatives are clearly evident in the efficiencies and accuracy in the operations. With various performance measurement criteria prevalent at the customer's end, these results can be well quantified and tracked. An industry-wide initiative towards capability development will help address this critical lever for the desired growth in the times to come.

COMPLIANCE

Another critical area which needs attention is **Compliance**; because with growing business needs, adherence to the laws of the land viz. company laws, labor laws, and environment laws is an absolute must for the sustenance of the organization in the long run. India has a wide number of laws applicable to companies addressing various areas like taxation, companies' registration and administration, environment, safety and health, transportation, labor and others.

Compliance issues become more complex as business achieves growth; & compliance helps keep a tab on whether the organizations are working responsibly or not. Compliance can be subdivided as Statutory / Regulatory Compliance and Internal Compliance based on various parameters. While statutory & regulatory compliances are in accordance with the laws of the land, internal compliances are more of policies & practices of every organization.

A company which is compliant with all the statutes earns the trust of various stakeholders of the organization and espouses positive image and builds consumers' trust because it lives up to their financial/commercial and reputational expectations. The Ministry of Corporate Affairs (earlier known as Company Affairs) of India considers itself responsible for 'sustained corporate growth with enlightened regulation'. It looks after the administration of all the major acts which are required to set up and run a company in India e.g. Companies Act, 1956/2013, Monopolies and Restrictive Trade Practices Act, 1969 (54 of 1969), Indian Partnership Act, 1932, and others. This institution is meant to serve the needs of the Corporate Sector and Corporate Regulatory System by providing inputs for policy, capacity building, knowledge up-gradation and documentation through various schools.

An internally compliant company increases the productivity of the company, as a positive organizational climate is achieved through employee related compliance to safety, wages, employee benefits, compensations, and employee protection. Thus internal compliance not only revolves around statutory labor compliance and but also goes over and above the provisions mentioned under the acts/laws.

With Make in India and the efforts to increase the Ease of Doing Business in India, the legislature was reviewed and a number of reforms were under discussion in the Parliament. As part of legislative reform process, the center has begun the process of codification and amalgamation of 44 Central labor laws into four codes in order to simplify them. The taxation legislature of the country is also set to undergo a major change with the implementation of GST w.e.f April 2017, as the tax structure in India is considered to be one of the most complicated ones.

The need for a change of legislature is felt because of following reasons:

Excessive procedural element:

There are various forms to be filled and permissions to be taken under various authorities under various states, there are at least 28 inspections that an establishment has to undergo to start a business and after it is in business. Hence reforms are needed to have a comprehensive inspection which saves the time of the authorities as well as the entrepreneur.

Not employer-friendly:

Most the laws are exuding too much pressure of compliance on the employer. The laws aim to protect the interests of the employees but end up putting a huge amount of onus on the compliance share on the employees while the employees give greater significance to their rights than their duties, responsibilities, and accountabilities; often leading to a conflict of interests between the employers and the employees.

Not effective in achieving the objects:

Quite a few laws in the Indian legislature are archaic and do not meet the dynamic needs of the globalized world, hence are ineffective in achieving the objectives defined under the acts.

Confusing terminology

The acts contain different definitions for the same term in different acts. The classic example is that of employee, workman, and worker to denote a blue collared employee, but the nomenclature is different, this makes the comprehension and application of the acts difficult and perplexing to the practitioners.

Compliance is hence highly sought after by multinational companies and within a developing economy like India, it will mark its importance further in the years to come. Professionally managed companies consider it as one of the most critical factors for sustainable growth in the long run.

CONCLUSION

The supply chain of tomorrow will be leaner & faster than ever. Most importantly it will go through radical changes with various factors playing a role as detailed above. This would mean that we would have come a long way from traditionally cumbersome models of supply chain management to a much more agile, accurate, efficient & productive operation.

Make in India initiative will transform supply chain management in line with the global expectations and make Indian logistics industry thrive for this sought after transformation. Investments made by the government of India and private players in this sector to meet the demand coupled with growing importance of capability development & compliance will raise the bar in this industry and create new benchmarks. This will also facilitate higher penetration of 3PLSP in the country which means losses on account of wastages/damages will also reduce & overall logistics cost will be optimized. This circle of productive operations generating required efficiencies & agility which in turn will optimize overall cost will soon break the vicious circle which Indian logistics industry is currently going through. The time is right for deploying these initiatives to propel supply chain management in the country; the time is right to Make in India. As it is rightly said by Sun Tzu - a high-ranking military general, strategist and tactician that: "The line between disorder and order lies in logistics."

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