

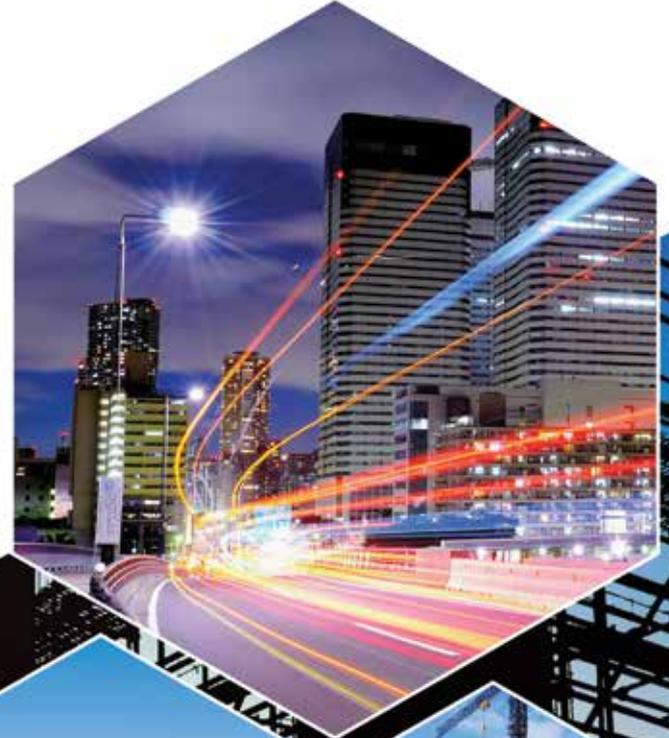


KALINGA INSTITUTE OF INDUSTRIAL TECHNOLOGY
Deemed to be University U/S 3 of the UGC Act, 1956
SCHOOL OF MANAGEMENT

kontempore

A CONSULTATIVE REPORT

Co-creating a Sustainable
Approach for **Talent
Transformation** in
Infrastructure
Sector



www.kontempore.com

kontempore

September, 2019

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About Kontempore

Kontempore, drawn from the words contemporary and relevant, is a movement to bring industry professionals together to explore, evolve and co-create a next generation talent management plan. Organizations are going to go through a huge talent transformation in the next decade because of automation, digitization, artificial intelligence etc. The type of talent the industry required and the opportunity the industry provided in the past will go through a huge transition with more part-time, contractual and consulting jobs.

India needs to add more than 300 million employable individuals across industries by 2022, over 2013. That is a herculean task but holds great promise to take our country to the next level. Kontempore aims to bring industry professionals together to explore, evolve and co-create a next generation talent management plan. It also aims to bring different stakeholders like academia, industry, consulting bodies and government organizations together to evolve a holistic change management agenda.

Kontempore's mission is "To revolutionize talent management practices by igniting engagement and building cohesion between industry stakeholders". Eminent people have been involved with it from the beginning to design this entire movement. With initial support from KIIT School of Management (www.ksom.ac.in), KIIT University as Academia Partner and Talent Triathlon, a Think Talent venture (www.thinktalentindia.com) as Knowledge Partner, many more partners are expected to join up to take this movement forward.

Kontempore is organizing a series of events engaging Industry Leaders from different industry segments, from time to time. These sessions are not just about networking and discussions. The purpose of these discussions is to have both moderated and un-moderated discussions which focus on the talent



challenges, capture the main points and create documents, blog posts, proposals and memorandum for the larger audience, including academicians, small businesses and the entire corporate world in general, who are grappling with talent and resource challenges.

Since 2017, Kontempore has conducted multiple events with industry focus on Automobile, BFSI, Infrastructure and IT and ITES industries. Industry leaders attended these sessions and helped identify the challenges facing these industries and also helped develop approaches to solving these challenges.

Editorial



Dear Reader,

Talent is the underlying value creator in any industry. The Infrastructure industry is one of the most significant employers of talent, certainly in terms of numbers. However, employers still lament the lack of 'good' talent, and employees of really satisfying careers. This industry is also characterized by a somewhat silo behaviour with regards to talent- while the talent and people issues are very common, there is really no common approach, or even forum, where different institutions can come together to create a meaningful and collective action plan. The talent challenges, among other things, may have resulted in

- The industry not attracting the best of talent, especially at junior levels.
- Limited availability of really good and multi skilled people.
- A limited leadership pipeline, especially at senior-middle (CXO-1 and CXO-2) levels.
- Industry consistently battling the Talent challenge by cutting costs and investments on people.
- Very little mobility of talent between sub sectors in the financial industry.

Kontempore has tried to address the Talent Challenges through a unique Large-Scale Interactive Process format. It allowed all participating minds to come together, all with a significant stake in the challenges facing the industry. The group came up with ideas and suggestions, applicable and relevant at different levels - organisational level, value chain level, educational eco-system level, and government level. The format, unlike tapping a few minds, as in a typical conference, is aimed at tapping minds and ideas from many professionals at the same time. It allows practitioners at different levels to come together and debate real issues, and more important, gives them the ability to home in on to a prioritised set of issues and possible actions.

The outcomes, as presented in this document, are being shared with the participants, other industry and eco-system leaders and professional and government bodies. We hope that this will help us in creating a momentum in dealing with the Talent issues in the Infrastructure Sector at every level and, with a collaborative approach, even better them. It would also allow:

- Further building of ideas from this event
- Individual stakeholders to mull over and take action where necessary from the ideas generated
- Creation of networks of various stakeholders through this process for collaborative action

Kontempore events are being planned in other cities and the various events will provide a route to collate even more ideas, momentum and action points for the various stakeholders. We look forward to your continued contribution to this topic and to Kontempore.

With Best Wishes,

Bimal Rath

Chief Editor

Editorial Board, Kontempore



Foreword



India's infrastructure landscape has never been as dynamic, with multiple factors driving its future. Today, the entire scenario is extremely fluid with various new players in the market, in the form of infrastructure financiers, developers, contractors, owners, service providers, in addition to constantly changing user dynamics and Government's thrust on development. The advent of IoT (Internet of Things), AI (Artificial Intelligence), Digital 4.0, machine learning, bots, blockchain have drastically changed the construction model globally. These digital and technological disruptions are driving the change for futuristic infrastructure. However, the challenge today is to ensure skill upgradation in line with these digital and technological advancements. This has resulted in the need to develop new and improved methods to successfully integrate them with in the infrastructure ecosystem.

The Infra Kontempore organised on 24th April in Mumbai, shed light on sustainable talent development in the fast-evolving infrastructure sector. In the key note discussion, we deliberated upon the challenges faced by companies such as KEC International Ltd.,

mitigation strategy adopted which led to KEC's turnaround in the last two decades to a global EPC major with multi-lingual workforce (talent pool from over 30 diverse cultures across borders) and a footprint in over 100 countries across six continents. Our success has primarily been on account of the open and contemporary work culture, strong emphasis on talent management, capability building, international exposure for enablement of our young workforce, policies that enable talent retention and enhance engagement, strong campus connect, and providing a holistic experience in terms of job rotation and job enrichment across KEC and the RPG Group.

I thoroughly enjoyed participating in the event, which provided a common platform to identify changing dynamics, challenges and possible remedial actions for talent management and retention in the infrastructure sector. The brainstorming sessions with various eminent industry stalwarts and senior leaders on various issues plaguing the industry and the steps taken by companies to remedy them was eye opening. This report covers all the vital aspects of talent management, critical to the infrastructure sector. I hope the Kontempore team will offer more such opportunities to bring together industry experts and enable collaboration in the coming months for sustainable talent development in the infrastructure sector.

I wish you a happy reading!

Vimal Kejriwal

MD & CEO

KEC International



Indian Infrastructure Sector: Introduction and Current State



Nation's human and economic development is closely related to its levels of achievement in physical and social infrastructure. Physical infrastructure not only an important determinant of domestic production (contributes to enhance productivity) but it also assists in the realization of the potential ability of human capital. It also directly and indirectly contributes towards improving the quality and safety of the people's lives. For India to maintain the growth momentum, it is essential to strengthen infrastructure facilities such as transportation, energy, communication, and so on. However, performance of physical infrastructure in Indian economy in the last one and a half decades has been mixed and uneven. In spite of some improvements in infrastructure in recent years, India still ranks 63rd (though up 5 places from 2017 and registered the largest gain of any country in the

G20) with the competitiveness score of 68.7 in basic infrastructure as per the Global Competitiveness Report 2018-19. This indicates poor development compared to other countries of the world.

The poor state of Indian infrastructure, stretched to limits by the growing population and increasing regional and rural-urban disparities, implies that major improvement in physical and social infrastructure is absolutely essential to sustain further progress and high rate of economic growth. Infrastructure sector being a key driver is highly responsible for propelling India's overall development enjoys intense focus from the Government of India. In fact, India's high rate of economic growth will be difficult to sustain if infrastructure development does not increase and keep pace with demand. At this juncture, it should be useful to take stock of the current infrastructure

situation in India and to compare with other countries, especially other major emerging economies like China, other BRICS countries and East Asia. India is doing well in terms of road density by population (road-km/1,000 people) however the quality of the roads is relatively inferior. For the year 2010, road density for India was 3.3, which compares well with 3.0 for China and 2.8 for East Asia. However, India lags behind other BRICS & other developed countries. Only 50 % the total roads in India are paved, which is much lower than in East Asia and developed countries. Also, the percentage of paved roads has increased rapidly in China to 53.5 %, thus leaving India behind.

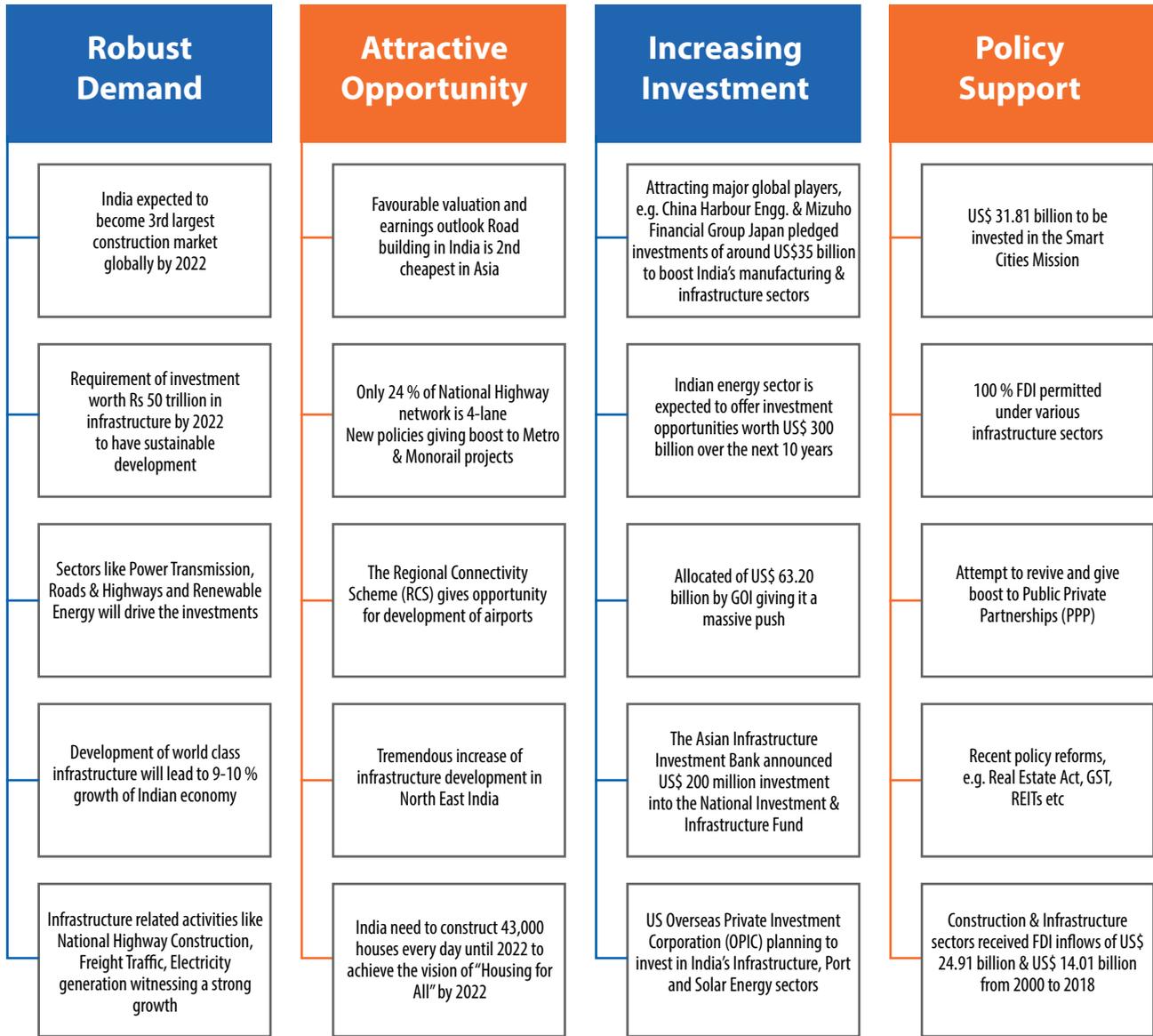
Indian Railways is the world's 4th largest railway network in the world comprising 115,000 km of track over a route of 65,000 km and 7,500 stations. As of 2011, the Indian Railways transported 0.8 million passenger-km per year per 1,000 people. Though this is better than that for China, East Asia and BRCS but much below that for the developed countries. However, on volume of goods transported, India at 0.5 million ton-km of goods per year per 1,000 people in 2011 fares better than East Asia only and is considerably behind China, BRCS countries and developed countries.

In India, only 57.7 persons per 1,000 people travelled by air in 2012 compared to 201 in China, 490 in East Asia, 333 in BRCS countries and a whopping 1480 in the developed countries. In terms of air transportation of freight, India's volume was only 1.4 (1,000 ton-km per 1,000 people) in 2012 compared to 13 for China, 18 for BRCS countries, 80 for East

Asia and a huge 111 for the developed countries.

The state of development in power and electricity can be gauged by three indicators, i.e. percentage of population with access to electricity network; electricity consumption per capita (kilowatt hours per year); and electricity power transmission and distribution (T&D) loss. In India, only 75 % of people have access to the electricity network as compared to 86 % for the East Asian countries and 94 % for the BRCS countries, and almost 100 % for China and the developed countries. Next, if we look at power consumption per capita; India again comes out at the bottom of the ladder with a per capita consumption of only 626 kilowatt hours. Compared to India's level, the per capita consumption of electricity is about 5 times higher in China, 6 times in East Asia, 7.5 times in BRCS and 15 times in the developed countries. The above indices show that India has a lot of work to do in these areas and has a huge scope to improve its performance that too at much faster pace.

Therefore, it is crucial for India to invest more in this crucial sector. To meet the need for infrastructure improvement, the Government of India raised the investment in infrastructure sector from 7.4 to 9.0% of GDP (i.e. from INR 20.5 trillion to INR 40.9 trillion) in the last 12th Five Year Plan. If these infrastructure investment plans are properly implemented, they can propel India's economic growth to a higher trajectory after the twin shocks of demonetization and the Goods and Services Tax.



Robust Demand for Indian Real Estate Sector

India as Emerging Key Player: Market Size and Investments



Infrastructure sector includes bridges, roads, highways, dams, real estate and housing (including urban infrastructure), power, electricity, ports, railways, aviation etc. Increased impetus to develop infrastructure in the country is attracting both domestic and international players. Private sector is emerging as a key player across various infrastructure segments, ranging from roads and communications to power and airports. Favourable valuations is making this sector an attractive opportunity. Aside, there are huge attractive business opportunities for the Infrastructure players, e.g. only 24% of the National Highway network is 4-lane. The cumulative growth in the index of eight core industries was 4.7 per cent in 2017-18 and 4.3 per cent year-on-year in Apr-Feb 2018-19. In the road's sector, the government's policy to increase the private sector participation has proved to be a boon for

the infrastructure industry with a large number of private players entering the business through the public-private partnership (PPP) model. India is expected to become the third largest construction market globally by 2022.



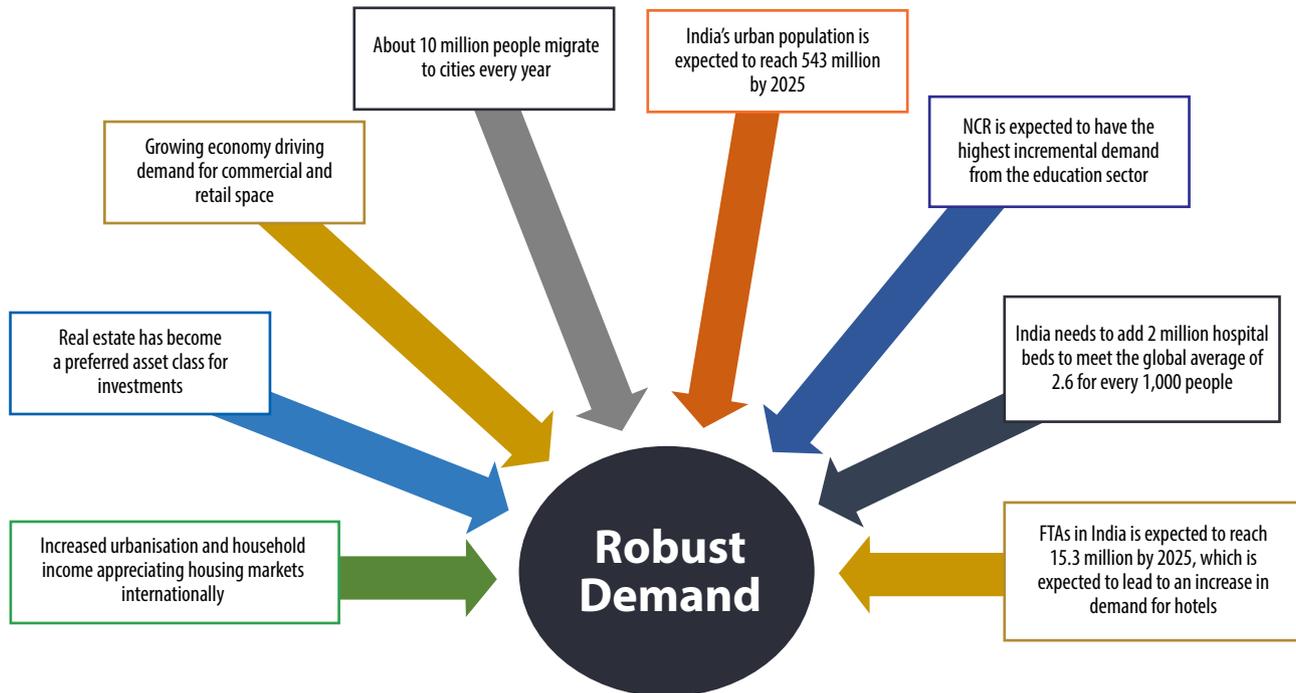


**Advantage
India:
Some Key
Trends**

- FDI received in Construction sector in last decade stood at US\$ 24.90 billion according to the DIPP
- For the transportation sector including rail, roads and shipping, Rs 1,34 lakh crore (a rise of 450% compared to FY2018)
- Allocation of Rs 70,544 crore for the road sector (a rise of 21% compared to FY2018)
- Asian Infrastructure Investment Bank (AIIB) announced US\$ 200 million investment into the National Investment & Infrastructure Fund (NIIF) in June 2018
- Expenditure for Railways pegged at Rs 1.48 lakh crore (a rise of 13% compared to FY2018) and allocation Rs 40,000 crore & Rs 17,000 crore on upgrading Mumbai & Bengaluru railway systems
- National highway construction recorded the highest increase of 20 % and highway construction revenues are forecasted to grow at a CAGR of 20 % by 2020
- GOI set a target for construction of 10,000 km national highway in FY19 and projects worth Rs. 1,10,154 crores were inaugurated
- GOI aims to construct 65,000 km of national highways at the cost US\$ 741.51 billion by 2022
- Freight traffic handled by Indian Railways increased 5.18 % Y-O-Y during 2018-19, while its gross earnings increased by 4.65 % Y-O-Y during the same time
- Electricity generation in the country increased by 3.77 % during 2018-19
- Cargo handled by major Indian ports increased by 2.90 % during 2018-19
- More than 6.85 million houses sanctioned up to 2018 under Pradhan Mantri Awas Yojana (PMAY)
- GOI plan to build 100 smart cities would reduce the migration of people to metro and other developed cities
- Investments in private equity and venture capital worth US\$ 4.47 billion in 2018
- Indian infrastructure sector witnessed 91 M&A deals worth US\$ 5.4 billion in 2017-18
- 12 PE/VC deals worth US\$ 1 billion in Dec 2018 and institutional investments worth US\$ 30 billion
- Logistics sector is growing at a CAGR of 10.5 % annually and is expected to reach US\$ 215 billion by 2020

The real estate comprises of 4 sub-sectors, i.e. housing, retail, hospitality and commercial. Real estate sector in India is expected to reach a market size of US\$ 1 trillion by 2030 and contribute 13 % of the country's GDP by 2025. Retail, hospitality and commercial real estate are also growing significantly, providing the much-needed infrastructure for India's growing needs. Commercial office space (including office space leasing in the top eight cities) in India

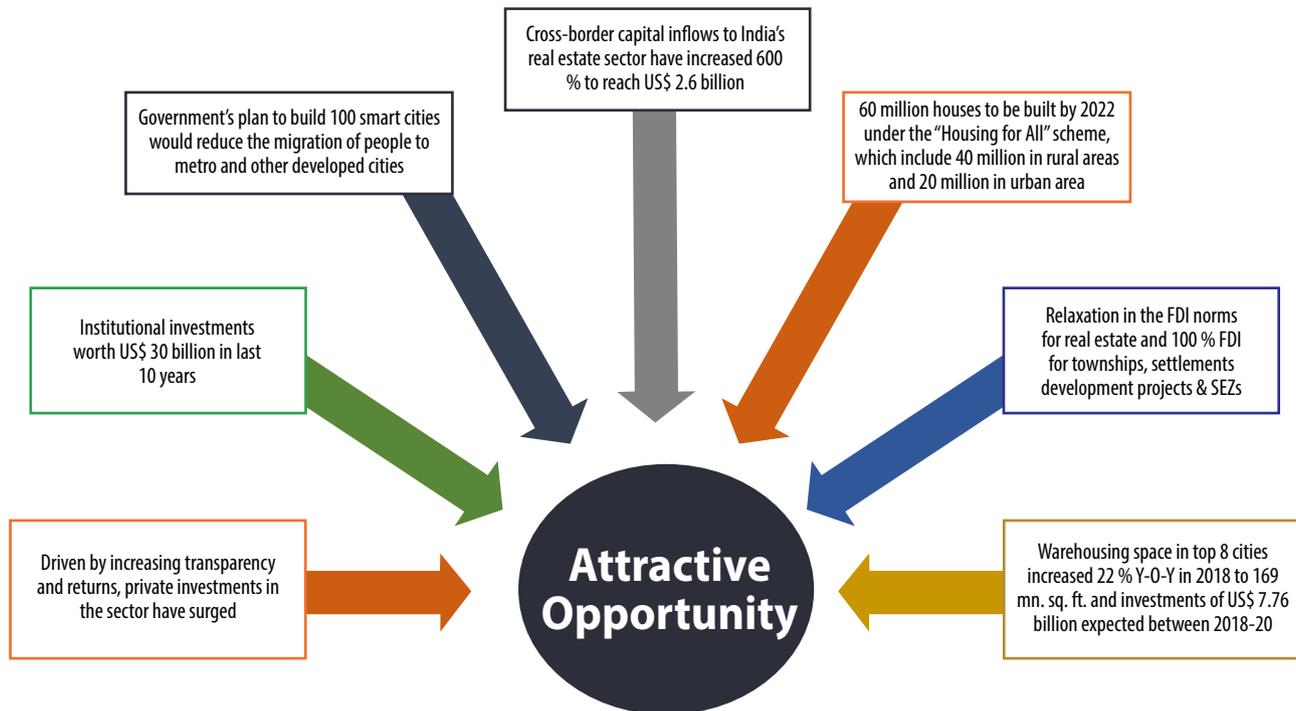
had crossed 700 million square feet by 2018. Also, co-working space has increased sharply to 3.44 million square feet, a jump of 200% as compared to last year. There is a robust demand in the sector as India requires investment of worth Rs. 50 trillion in infrastructure by 2022 to fulfil the sustainable development goals of the country. India is witnessing significant interest from international investors in the infrastructure space. Some recent key highlights are:



Robust Demand for Indian Real Estate Sector

The infrastructure sector has become the biggest focus area of the Government of India. It has been decided that all the villages in India will be connected through a road network by 2019 under Pradhan Mantri Gram Sadak Yojana (PMGSY). National highway construction in India has increased by 20 % year-on-year in 2018-19 and road building in India has become the 2nd cheapest in Asia. In order to boost the construction of buildings in the country, the Government of India implemented

single window clearance facility to accord speedy approval of construction projects. In 2018, India was ranked 44th (Out of 167 countries) in World Bank's Logistics Performance Index (LPI) and was ranked 2nd in the 2018 Agility Emerging Markets Logistics Index. The Government of India is expected to invest highly in the infrastructure sector, mainly highways, renewable energy and urban transport and it is taking every possible initiative to boost the infrastructure sector.



Opportunities for Indian Real Estate Sector

Massive Boost to Infrastructure Sector in Union Budget 2019-20



Massive push to the infrastructure sector by allocating US\$ 63.20 billion wherein US\$ 11.51 billion has been allocated towards road transport and highways



Allocation of US\$ 299.51 million for the upgradation of medical colleges, district hospitals and government health institutions



Indian Railways received allocation of US\$ 9.25 billion (US\$ 8.95 billion is the capital expenditure and announcement of new Metro Rail Policy to boost the private investment in the sector



Communication sector allocated US\$ 5.36 billion for development of the posts and telecommunications departments including US\$ 1.16 billion to boost telecom infrastructure



Initiatives like 'Housing for All (PMAY)', 'Smart City Mission' and 'Ujwal DISCOM Assurance Yojana (UDAY)': More than 6.85 million houses sanctioned under Pradhan Mantri Awas Yojana (PMAY) Urban including construction of additional 3 lakhs affordable houses and creation of National Urban Housing Fund with an outlay of US\$ 9.27 billion



Improving energy infrastructure in the country and investment opportunities worth US\$ 300 billion in the sector in the coming 10 years. Also, US\$ 540.53 billion allocated to increase the capacity of Green Energy Corridor Project (along with wind and solar power projects)



SEBI approved platform for the Real Estate Investment Trust (REIT) to assist all kinds of investors to invest in the Indian real estate market and expecting to create an opportunity worth US\$ 19.65 billion in the Indian market over the years

Infra Kontempore at Mumbai



Infra Kontempore, Mumbai held on 24th April 2019 was the 1st Edition in the series for Infrastructure domain. The event was organized with an objective to deliberate sustainable approach to Talent Management issues in the Infrastructure Sector with views from various Industry stalwarts and senior leaders. It provided a common platform to identify the challenges faced by Infrastructure sector and brainstorm the possible remedial actions. The participants finally dwelled upon some bold solutions for the talent management subject being faced by the concerned industry.

Process

Infra Kontempore event started by context setting by Mr. Vimal Kejriwal, Managing Director & CEO and a Member of the Board of KEC International Limited. The keynote address was followed by Large Scale Interactive Process (LSIP) process. The event witnessed successful execution of a true crowd-sourcing platform for ideation and generation of



innovative answers to the most imposing questions on talent issues in form of LSIP. The participants were divided into six groups, i.e. each group on a separate meeting table with a senior facilitator / leader. The intent was to perform a '5-Steps' deliberation process wherein the initial steps were to record the talent-related concerns / challenges and possible remedial actions faced by the industry individually. This was followed by discussion among the group

members facilitated by the team lead to collate all the points as a representation from the team on the subject. 4th step was 'Open Café' session wherein members were allowed to visit other tables and observe / discuss the points listed by other groups. Once each group was aware of discussions of all the groups; each group identified 3 key challenges along with the proposed unique solutions for these challenges. Finally, the group lead shared their learnings with all the stakeholders of Kontempore via a 'Panel discussion' leading to an enriching experience for all the participants. The uniqueness of the entire process was that it encouraged lively debate amongst participants, raised many incisive questions and still kept the discussion on track without influencing the individual opinion of the members.



Outcome

Mr. Vimal Kejriwal during his Keynote lucidly narrated the story behind turnaround of KEC International in last two decades to a largest tower manufacturing company globally with multi-lingual workforce (talent pool from 29 diverse cultures across borders) highlighting the challenges faced and mitigation strategy adopted successfully. He attributed this success to 'Eight Pillars' which led the Company to establish business across 100 plus countries across Africa, Americas, Central Asia, Middle East, South Asia and South East Asia in the verticals of Power Transmission & Distribution, Cables, Railways, Civil, Smart Infrastructure and Solar:

- Clear Vision of the Company
- Strong Emphasis on Talent Issues
- Employee's Capability Development
- International Exposure Enablement of Young Workforce
- Retaining & Pushing Talent
- Automation (Contemporary Practices)
- Strong Campus Connect



Discussion summary of the highly participative and iterative process

CHALLENGES	IDEAS FOR ACTION
<p>Talent Management Issues</p> <ul style="list-style-type: none"> • Attracting & retaining right talent (with right experience within budget) • Knowledge retention, i.e. knowledge drain with exiting employees • Peer Comparison with Contemporaries in other Industries • Perception of having rotten offer (low ball offer) • Lack of transparent contract, i.e. Terms of Service • Change in mind-set, i.e. sticking with old-fashioned industry mind-set 	<ul style="list-style-type: none"> • Hire best-fit candidates, i.e. hiring strategy relevant to the business • Best Compensation & Benefits (C&B) • Clear 'Terms of Service', i.e. Job clarity • Effective performance appraisal & recognition system • Policy for R+R (Rest & Recreation) • Proper working conditions & employee engagement • Opportunities to showcase talent, interests & ideas • Healthy relations with ex-employees
<p>2. Learning and Development and Technology Adoption</p> <ul style="list-style-type: none"> • Capability development issues • Employee productivity, ownership & leadership vis-a-vis skill gaps • Adaptability, adoption & oneness of corporate culture • Accountability, client perspective & casual approach, i.e. low focus on quality & safety • Sensitization on local customs, social behaviour (of other regions / nations) • Adoption to changing business reality & new technology • Building competency for new business • Learnability, re-skilling & technology update 	<ul style="list-style-type: none"> • Effective on-board training, coaching, mentoring & feedback to engage employees • Grooming & optimizing leadership pipeline • Structured target, orientation & cadre building • Building Ethics & accountability into corporate culture • Sensitization of manager with current culture and aspiration • Multi-skilling of the employees with efficient technology usage (to increase efficiency and reduce dependency) • Creation of CSTI (Construction Skill Training Institute), TEA (Technology & Engineering Academy) & FLS (Front line supervisor) Training • Provision for e-learning programs at self-pace Ensuring ability to innovate and re-skill quickly

CHALLENGES

IDEAS FOR ACTION

3. Sector-Driven Challenges

- Poor compensation and lack of long-time ROI for a fresher, i.e. Civil / Infra sectors NOT a career-of-choice
- Poor working conditions & remote project locations
- Mobility issues (including frequent dislocation) & lack of willingness to undertake hardship
- Complexity of Project Management, e.g. project-based work hinders career planning
- Paucity of mid-level management people for leadership position, i.e. limited talent pool and same keep floating between the companies
- Lack of local talent (especially in countries abroad)
- Inadequate management capability for managing huge workforce
- Lack of good corporate governance model
- Inadequate policies, e.g. safety, environment mind-set
- Increasing procedure by Govt. to follow compliances

- Mind-set change through sensitization, i.e. creating attractive career, mobility / dislocation & welfare policies for employees, family and career progression
- Creation of appropriate social infra @ sites with adequate wealth creation or fiscal incentives (ESOPs, Rewards & Recognition etc)
- Providing better infrastructure & working environment / conditions, i.e. engagement opportunities @ sites with provision for bifurcated career paths
- Strategy for 'Moving up the Value Chain' & cross functional exposure
- Effective project management through industry veteran mentorship & in-house KM
- Inculcate culture of safety, health, sustainability and ethics @ sites
- Brand building of organizations as well as industry as a whole, e.g. 'Walk-the-Talk' programs with experts
- Proper regulatory framework and policy support from the Govt. (possibility of self-regulation by the industry)
- Increase compliance awareness through internal communication

4. Industry Academia Interfaces

- Academia unable to visualize & sync with the changing needs of industry
- Scarcity of skilled workforce in construction industry
- Deficiency of knowledge and trained persons in key specializations
- Unavailability of techno-commercial and entrepreneurial skills
- Academics need to update on new / latest technology
- Students lacks fire to learn in-depth and joins industry with minimal practical exposure

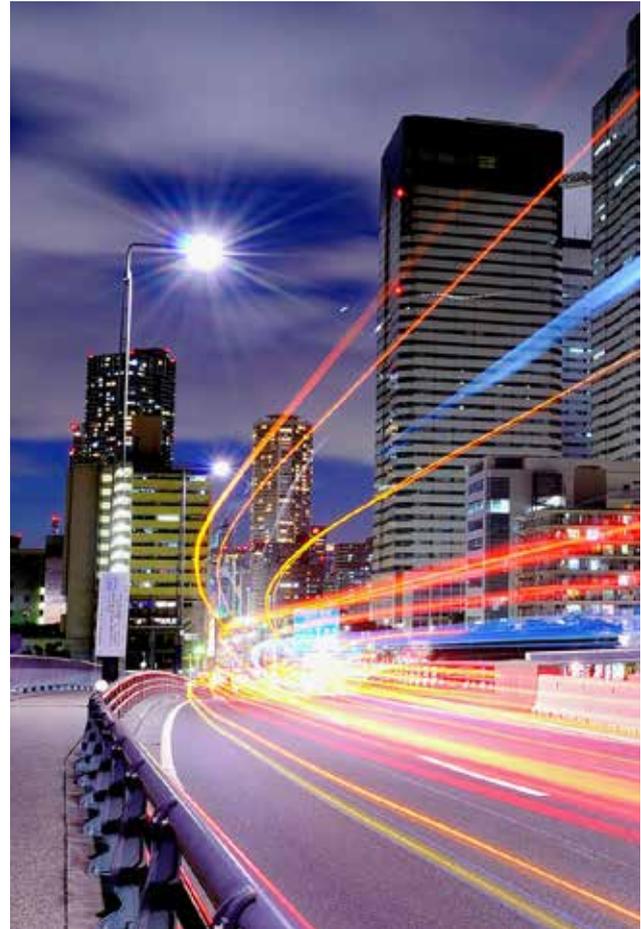
- Provision for co-creating & deliver curriculum by the industry experts
- Long-term association with institute for training-cum-hiring model for continuous supply of manpower
- Policy for immersive internship (min 6-months) and involvement in live projects till completion
- Teach relevant and latest technology in curriculum, e.g. inclusion of courses on managerial & business awareness
- Experiential learning to students by practising professionals
- Faculty sabbatical with industry to augment the overall knowledge

Conclusion

The talent landscape in India presents a different set of challenges in the infrastructure industry. With regulatory changes and uncertainty around the industry the talent challenges only intensify. The industry recognizes that it isn't really the most attractive for freshers.

Like many other areas, even in the talent sphere there are two India's, one which is the urban metro/cosmopolitan face, the other being the rural Bharat. The value that the two bring to the table and challenges associated with each of these talent pools are unique and therefore need to be addressed through a mix of different approaches and strategies. The people who manage talent pipelines in organizations have juggled with multiple models, some seem to work in some situations, and some have turned out to be a cropper. Nevertheless, there seems to be an overall sense of optimism linked to the Indian talent pool and its contribution to the economy.

There needs to be more efforts at integrating with the talent suppliers, including the educational institutes. There needs to be more transparent osmosis of knowledge and experiences between industry and academia, in terms of practical experiences and faculty training and experience in the industry. The talent and learning and development challenges need to be tackled with expert help from HR leaders



who have aced such challenges in the industry and with the adoption of technology. The sector specific challenges are more systemic and need help from the government as well as from other eco-system stakeholders to help overcome the challenges.

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