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Creating

WORLD  CQI |  IRCA
QUALITY DAY 2020
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INTERVIEW

Shri N. Venkateswaran
CEO, NABL



PLUS

ROUND UP • MY MARKET • THE PRESCRIPTION



National Accreditation Board for Testing and Calibration Laboratories (NABL)

(A constituent board of Quality Council of India)



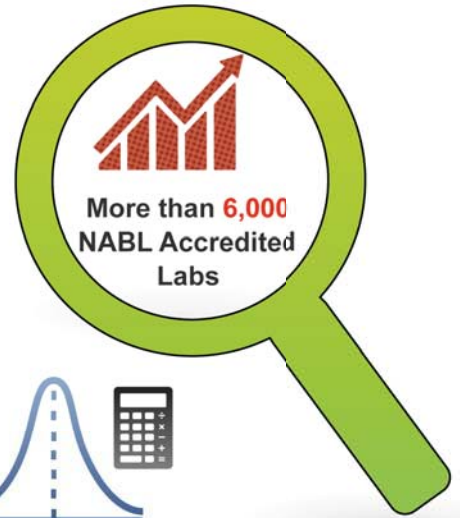
Calibration Labs

INTERNATIONAL STANDARD ISO/IEC 17025

General requirements for the competence of testing and calibration laboratories



Testing Labs



More than **6,000** NABL Accredited Labs



Medical Labs

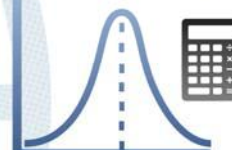
INTERNATIONAL STANDARD ISO 15189

Medical laboratories — Requirements for quality and competence



INTERNATIONAL STANDARD ISO/IEC 17043

Conformity assessment — General requirements for proficiency testing



$-2 \leq z\text{-score} \leq +2$

Proficiency Testing Provider

INTERNATIONAL STANDARD ISO 17034

General requirements for the competence of reference material producers



Reference Material Producers



International Laboratory Accreditation Cooperation



ASIA PACIFIC ACCREDITATION COOPERATION



NABL Accredits laboratories in accordance with international standard:

Testing and Calibration laboratories in accordance with ISO/IEC 17025

Medical laboratories in accordance with ISO 15189

Proficiency Testing Providers in accordance with ISO/IEC 17043

Reference Material Producer in accordance with ISO 17034

NABL is complying to ISO/IEC 17011 and is a full member and signatory (since 2000) to ILAC & APAC Mutual Recognition Arrangement (MRA) which ensures acceptance of test/calibration results between countries which MRA partners represent



Accredited Once Accepted Everywhere

VIEWPOINT



BEJON KUMAR MISRA | bejonmisra@theawareconsumer.in

Creating Lasting Customer Value

AS WE CELEBRATE World Quality Day on November 12 amid the pandemic there is a growing realization that the global consumer has changed or is changing. The theme of World Quality Day 2020 – Creating Customer Value – is therefore, appropriate. Retailers need to realize that in the current world, business is no longer about selling products, for, howsoever premium and useful your product maybe, if does not offer consumers a clear and unambiguous value proposition it will lose out to many inferior offerings. So, what does 'creating customer value' mean? What does it entail?

Wikipedia defines consumer value as “a consumer’s strong relative preference for certain subjectively evaluated product or service attribute. These values include efficiency, excellence, status, esteem, play, aesthetics, ethics and spirituality.” Other definitions include “the regard that something is held to deserve; the importance, worth, or usefulness of something” and its synonyms are: merit, worth, usefulness, use, utility, practicality, advantage, desirability, benefit, gain, profit, good, service, help, helpfulness, assistance, effectiveness, efficacy, avail, importance, significance, point, sense. Technically, “Customer Value is the perception of what a product or service is worth to a customer versus the possible

alternatives. Worth means whether the Customer feels s/he or he got benefits and services over what s/he paid.”

Technically, experts also distinguish between 'consumer' and 'customer. Consumers are described as distinct from customers. While consumers use the product or the service, but not necessarily buy the product/service, the value of a product as perceived by the consumer influences how he/she evaluates and perceives the product and impacts the decision-maker or the customer. The customer, hence, is the one who buys or makes the decision to buy and is distinct from the non-customer who could buy from a company but buys from another.

To create customer value, companies must focus on processes and systems as much as on the mindset and culture. The latter are human traits and much difficult to change. However, if a company wants to gain competitive advantage and change consumers into potential customers, it must aim at creating lasting customer value. It is the only way to increase customer satisfaction and customer experience, winning lifelong customer for the company in the process.

World Quality Day 2020 is your opportunity to celebrate your quality achievements, and recognise those that uphold trust to sustain and improve performance every day of the year.

TRUST THE EXPERT SOLUTION FOR YOUR MULTIPLE SKIN PROBLEMS

Sweat is a natural and healthy bodily function. However, sweat trapped in your skin folds, friction and lack of ventilation cause multiple skin problems such as redness, rashes, prickly heat and even fungal infections.

Your regular prickly heat or cooling powder only provides temporary relief. Candid Dusting Powder contains Clotrimazole which is globally proven for its long lasting* effectiveness against multiple skin problems** making it the Expert Skin Solution.

NO.1 **DOCTOR'S PRESCRIBED** ⁺
BRAND



Why Candid Dusting Powder is the Expert Skin Solution	Candid Dusting Powder	Normal Prickly heat/ Cooling powder
Formulated with globally proven antifungal agent	✓	✗
Ensures prickly heat rash/boils do not lead to fungal infection	✓	✗
Proven long lasting solution* and not temporary relief	✓	✗
Effective against itching, irritation, redness and rashes caused due to fungal infections	✓	✗

1 EXPERT SOLUTION FOR 4 SKIN PROBLEMS



PRICKLY HEAT ~



REDNESS



RASHES



FUNGAL INFECTION

MESSAGE FROM EDITOR-IN-CHIEF

The ongoing COVID-19 pandemic has wrought many changes, some lasting and damaging, others more beneficial. The global economic recession set off by the

lockdown and the continuing crisis has led to mass layoffs, salary cuts and general financial uncertainty for consumers. Till before the pandemic, India had been hurtling towards a consumerist culture. The increasing penetration of e-commerce and the rising disposable incomes in the

hands of India's huge and growing middle class across the country had seen the culture percolate down to the tiered cities and suburbs. High street international brands became accessible at the click of the mouse and fashion was dictated by the tabloids and the rising breed of social media influencers pushing commercial products. The Indian consumer had finally discovered global fashion and was also experimenting with international palate as branded stores discovered the huge potential of India's small cities.

All this came to a grinding halt as pandemic hit forcing people to stay home. All non-essential purchases were stopped initially as only essentials were allowed to be home delivered. As the pandemic continued, and the economy went into a tumble,

COVID-19 Has Changed The Consumer, Businesses Must Read Between The Lines



suddenly, consumers began to realize the impact of the crisis. It was not the time to spend and splurge but hold on to every extra penny for the rainy day. There was more. The enforced frugality had consumers looking for more value and subtly the perceptions of value were also changing. What was valuable pre-pandemic was no longer so. An expensive watch or a formal dress which sat in the wardrobe had virtually no value. Expensive was not necessarily valuable or good. A discernible thread was the shifting preference for quality over mindless quantity. Today it is no longer about acquisition. It's about lasting value.

Businesses that are reading these changing perceptions of consumers can find a thousand opportunities even during these dismal times.

Pooja Khaitan
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15

RESEARCH FEATURE

CREATING CUSTOMER VALUE THROUGH QUALITY



The theme of World Quality Day 2020 being celebrated on November 12 is 'creating customer value', often overlooked by organizations.



23

HORIZON

CUSTOMER EXPERIENCE AT THE CRUX OF BUSINESS GROWTH



Good customer experience is fundamental to a long-lasting customer-business relationship.



33

INTERVIEW



Mr. N. Venkateswaran,
CEO, NABL

39

MY MARKET

THE CHANGED CONSUMER



The COVID-19 pandemic has changed consumer behavior and their value perception.



43

OUT OF THE BOX

THE CO-CREATION OF VALUE: A WIN-WIN



Today's customers seek experiential satisfaction through products and services as the trend grows towards customization and personalization.



47

IN FOCUS

NABL: PROMOTING QUALITY IN THE FIGHT AGAINST PANDEMIC



NABL accreditation is going to be mandatory for all COVID testing laboratories

JEFF BEZOS
CEO AND PRESIDENT OF AMAZON

"A brand for a company is like a reputation for a person.
You earn reputation by trying to do hard things well."



ROUNDUP

A culture of
zealousness
around quality
needs to be
created that
eventually
becomes the
company credo.
Only then can
we compete
in global
markets.

QUALITY

Success In The Global Market Is All About Quality

Indian companies must shed the price-sensitive consumer and cater to the premium segment with best of best products and services.

DATA BRIEFING

Rs 11878.84
Billion –
Consumer spending
in India averaged
Rs 11878.84 Billion
from 2004 until
2020, reaching an
all-time high of
Rs 21823.52 Billion
in the fourth
quarter of 2019.

BUILDING QUALITY

INTO products and services to the standard that is required to win in global markets, cannot be achieved with transactional management of quality using proven quality tools.

India's potential as a global player depends to a large extent on how it creates customer value in international markets. For long, the dominant philosophy guiding Indian companies is catering to the price conscious consumer. This perspective must change if India has to make its mark globally. The reason is that in global markets the core customer group which translates into the largest opportunity, comprises customers who seek value. The price-conscious consumers are at the periphery.

It is time to change our brand positioning from a market of cheap labor and cheaper goods to one that has a premium brand value and to own which consumers would not hesitate to splurge lavishly. This is the only way to distinguish India from other cheap mass-producing markets.

The challenge for Indian companies therefore is to build a business that can compete in the global space and win too – not because Indian goods are cheap but that they are expensive and present customer value. It requires understanding the four categories of customer value and tailoring the products to appeal to the global consumer in these four parameters. It is actually not an impossible task and requires making just some changes. This would transform the product into a brand promise or unique selling proposition. These distinguishing values would help differentiate businesses and develop a deeper brand affinity, recognition, and loyalty in consumers. The four parameters according to experts are:

- **Functional** – This is the quality of the brand, product, or service
- **Emotional** – This value translates into how a brand, product, or service makes the customer feel
- **Life-Changing** – A deep impact value as it is the way the brand, product, or service alters the life of the customer
- **Social Impact** – This subsumes the sustainability question



The challenge for Indian companies is to build a business that can compete in the global space and win too – not because Indian goods are cheap but that they are expensive and present customer value.

Creating products with such values depends on what you are offering in a product beyond the minimal qualities that all other products must have to qualify as what it claims to be. The idea is to become the best product in the must have values category to compete successfully in the market. For example, for a discerning global consumer when it comes to buying a product it is not the price but the values that it epitomizes making it the best on the shelf.

Indian products compete with global products and services from known brands and from a country of origin that the customers respect and trust. To compete with such products, Indian manufacturers must create winning products.

In this regard, the importance of quality in products made in India cannot be overemphasized. A global consumer choosing a product made in India is taking a calculated risk. Now, if the product fails to satisfy on the quality parameters, it is not just the product but India as a brand and destination country that loses the global market.

To build the best of best quality goods, the tone has to be set at the top management level. Companies need transformational management of quality driven from the top. A culture of zealousness around quality needs to be created that eventually becomes the company credo. Only then can we compete in global markets. ▶



Post-COVID e-Commerce Is All About Customer Value Optimization

Only proactive, empathetic and customer centric companies will survive the long drawn out pandemic.

WHAT ARE THE lessons that every business owner or e-commerce manager should learn from the COVID-19 pandemic? Let us put it in perspective. The pandemic crisis has segmented businesses into two categories: The first type is empathetic, customer-centric, acting proactively, and looking for opportunities, while the second kind of business is reactive, product-centric, trying the same strategies in a hectic way.

Businesses that see the pandemic as an opportunity are the ones that will sustain through this long crisis. Alibaba is an exemplary case. It launched its online marketplace for consumers during the SARS crisis when the demand for online deliveries shot up with people quarantined at home.

In the current crisis too, companies that have seized the opportunity to

penetrate the online market are thriving. Such companies have built customer-centricity into their DNA knowing well that 95% of the purchase decisions are based on emotions. Companies that have succeeded in providing safe, quality and timely deliveries to customers will be long remembered. Good customer experience is like a dose of dopamine leading to affirmative action for the company.

Customer value optimization is central to ensuring better customer experience. While a company needs to acquire more valuable customers, earn profits from existing ones and retain them longer by improving their experience; the customer must be provided perceivable value to stay with the company. Sacrificing customer value for short-term profits is bound to impact the business negatively.

To grow healthy and sustain the business companies must begin with evaluating their business and measuring customer value. They must target specific clusters of customers and to generate higher rates of response, increased loyalty and better customer lifetime value. For most businesses, 20% of the customers bring 80% of their revenue. Actively trying to discover buying anomalies helps companies pinpoint toxic brands or categories and find out which cities have the largest base of loyal customers.

Customer Value Optimization promises some long-term returns allowing businesses to discover deep insights and data that could help take better decisions. Focusing on the customer during a crisis increases consumer loyalty and makes for a winning long-term business strategy. ▶

The New



Customer experience (CX) in the time of pandemic is all about speed and convenience, as also human touch and making a real connection. Consumers appreciate a company's responsiveness, caring, and an appreciation of their problems.

CONSUMER CONFIDENCE HAS reached a new low as customers struggle to deal with the health and the economic crises. This necessitates that companies find innovative ways to adapt to changing customer expectations and stay the course.

Consumers are in a new space – it is uncomfortable, their confidence is eroded, there is economic uncertainty and the pandemic is still around. They are looking for reassurance. This new consumer market makes it necessary for brands to engage, acquire and retain their customers and calls for new and innovative approach.

The desire for safety has had many consumers repose faith in online. However, for a brand it is difficult to establish a foundation of trust with the consumer in the absence of physical interactions that provide a true feel of an individual customer.

Consumers are looking for tangible value and prefer organizations that are available when they wish to reach-

out, dial-in, log-on or download. Organizations must ensure that they can handle the increased volumes of online traffic without compromising on individual attention and timeliness of response.

The key to succeed during uncertain times is preparedness, communication, priorities and actions that differentiate the brand from competition. Companies must invest in bolstering backend capabilities to avoid customer delay, frustration and disappointment. To enhance customer interaction, companies must ensure interdepartmental fluidity, system adaption and frontline engagement.

Upskilling is an important driver of customer value. It will help companies derive value from the system, process, and technology. Organizations must also create a CX custodian who will facilitate customer interaction.

The intrinsic value of ensuring each customer's loyalty journey cannot be overstated. Studies report that a single



The e-commerce segment is showing an increased number of first-time shoppers.

satisfied customer is estimated to spend seven times their initial value over their relationship timeline with that business.

The pandemic has changed business and social ecosystems permanently. The continued uncertainty means that there is no going back to normal anytime soon. In fact, we are in a new normal and the longer we stay in this, the more deeply entrenched this will become. What it implies is that there is no going back to the normal for customer experiences as well and businesses must find new ways of delighting 'customers.

Physical distancing has changed the world as we knew it and it is imperative to offer customers flexible resolutions to their individual needs. This can be achieved by being accessible to them and placing technology at the heart of customer experience. ▶

The New Normal Consumers Seek Value Proposition

Financial constraints amid economic uncertainty is forcing consumers reprioritize their purchases.

THE FIFTH EDITION of the 'COVID-19 Evolving Consumer Trends' report by Nielsen predicts key shifts in consumer behaviors brought on by the pandemic.

Though the curbs are easing, restrictions on travel continue. Consumers are also being cautious in spending on luxury, entertainment and non-essentials due to financial constraints and safety issues. Not only this, the pandemic is creating a new basket of essentials that is focused on health and safety. The spending is also merging old and new needs. The report predicts in-home spending taking priority over discretionary out-of-home spending. Consumers will seek products and services that provide value, quality and peace of mind. This change is due to the declining consumer confidence brought about by salary cuts and lay-offs.

Indian FMCG companies have been hit hard by the pandemic as consumers prefer to spend on essential commodities, which shows a restrained revival. However, the trend points to a recovery in FMCG with demand stabilizing and driven mostly by rural India.

There is a tendency among consumers to purchase groceries and home solutions in the mass and popular price segment as also economy packs that offer clear value proposition. They are also on the lookout for deals and promotions.

As cautious consumers adopt online shopping preferring its safety, the e-commerce segment is showing an increased number of first-time shoppers. The average spends per shopper, order value, number of items purchased have also increased on online platforms. Mobiles and accessories, appliances and electronics are driving the recovery for e-commerce. Not so surprisingly, there is a decline in online fashion sales as majority continue to work from home and not many are venturing out of home.

The 'new normal' consumers are adopting e-commerce forcing many companies to increase investment in digital and online platforms. Many companies have also reprioritized their production capacity and are focusing more on needs-based commodities. Communication is set to play a big role in the new normal market as companies work on their strategy to emphasize safety, health and hygiene in their products and services. ▶

Source: Secondary research & media reports



DISPO VAN

THE TRUSTED BRAND
PROMOTING PATIENT SAFETY

**MADE IN INDIA,
CURING PEOPLE
AROUND
THE GLOBE**



Precision Engineered, Affordable & Easy to use.

Consumers, Beware

SCAMMING GETS CREATIVE

Fraudsters are playing on psychological and economic vulnerabilities of consumers during the prolonged pandemic.



Online fraudsters generally target the gullible elderly who are not so tech-savvy.

THE PANDEMIC HAS acted as an impetus for many consumers to shift online attracting fraudsters like bees to honey. The online frauds have mutated in character and become even more difficult to spot. Untrained consumers are certainly an easy target for cybercriminals who play on the pandemic fears of the unsuspecting consumers. According to the Federal Trade Commission, Americans have lost more than \$145 million to fraud related to the coronavirus. The commission had fielded more than 200,000 complaints from consumers regarding cyber frauds.

In America federal stimulus payments and other forms of financial relief acted as a magnet for online thieves. The commission's Consumer Sentinel Network that provides law enforcement agencies and the public with information about rampant forms of fraud, has compiled the data. Nearly 206,000 coronavirus-related frauds were submitted to the FTC from January 1 through September 22.

The commission reported a median loss of \$300, adding that the losses could be higher for older Americans. Online fraudsters generally target the gullible elderly who are not so tech-savvy.

It is unfortunate that scams multiply during natural disasters as the uncertainty in the environment makes everyone vulnerable. In India too, the rising phishing and other forms of online frauds had made governments and financial institutions send out public warnings to consumers. The warnings cautioned consumers about frauds asking for personal data, insurance information or banking information. Scammers use such information to commit identity theft, medical insurance fraud or banking fraud.

Another form of fraud is related to pandemic related products that claim to cure or prevent COVID-19. Looking at the demand for sanitizers, masks, gloves, PPE kits, etc., in the past few months several local manufacturing units have sprung up that sell substandard or spurious goods.

A recent report by Consumer Guidance Society of India (CGSI) said that around 50 per cent of the 120 sanitizers tested in Mumbai were found adulterated. The consumer body found that of the 50 per cent, 4 per cent contained toxic methyl alcohol.

The adulteration poses serious health dangers as longer use of methyl alcohol could lead to blindness and other health issues.

As per media reports, the CGSI, a 54-year-old body, will send its report to the Centre and Food and Drug Administration (FDA) seeking action against the fraud.

Hand hygiene is being promoted as one of the critical protocols to contain the spread of coronavirus. However, it

has become a fertile ground for the unscrupulous to enter the business for quick money. Though washing hands with soap is touted to be most effective, however, in the absence of water and soap, citizens are advised to sanitize their hands. Sanitizers that contains at least 60 per cent alcohol are advisable to use, but when manufacturers substitute methyl alcohol for ethyl alcohol, it becomes problematic. Disinfectants containing methanol do not qualify as sanitizers as the chemical agent is a banned item. Sale of natural ethanol is strictly regulated in India. Other types of alcohol that do not require a permit are very expensive.

The samples tested included 75 bottles containing 250 ml sanitizer that did not even contain any alcohol. Around 37 per cent sanitizer available in the market does not adhere to the specification on the label.

Fraudulent corona virus antibody tests are another kind of fraud taking place. Dubious labs have sprung up that promise quick test results. Some fraudsters are even

advertising cure or preventive treatment for COVID-19. These include natural cures that can end up doing more harm than good.

With many losing their jobs in the pandemic, scams promising jobs or get rich quick schemes are also rising.

Sending out robocalls, text messages and emails to consumers has become common. Most of these automated calls cannot be traced and after stealing your last rupee the scammers vanish in thin air.

The success of the frauds that spike in the immediate aftermath of a disaster depends upon playing on the natural fears of consumers who move into "flight-or-fight mode" and under stress are more prone to taking snap decisions without stopping to think and fall for the clickbait.

As the pandemic persists and with continuous awareness drives and education consumers become more aware of the frauds, scammers will adopt new tactics and approaches. They will prey on the financial worries, loneliness and isolation, even depression of the consumers as the psychological vulnerabilities mount in economic uncertainty.

Consumers must take all precautions to avoid websites promising coronavirus-related vaccines or cures, emails, calls or social media posts advertising coronavirus tests, or claiming to be raising funds for victims or research, and those seeking personal information. Clicking links or downloading from unsolicited emails or text messages is totally avoidable.

A disaster is no time to be emotional. As consumers we must harden our hearts and minds to say safe. ▶

Source: Secondary research & media reports



Spurious sanitisers flood market

WORLD
QUALITY
DAY 2020

12 November, 2020

Creating Customer Value Through



The theme of World Quality Day 2020 being celebrated on November 12 is 'creating customer value', often overlooked by organizations. In today's markets where consumers are spoilt for choice, creating customer value is more important than ever. Organizations need to create customer-centric quality culture to ensure lasting value for customers and win their loyalty.

THIS WORLD QUALITY Day on 12 November 2020, the spotlight will be on individuals, teams and organizations that are deeply invested in creating and improving customer value.

Customer-focused organizations need to establish a culture of creating value for their customers. This they can achieve by innovating and improving products, services and processes.

Companies no longer view consumers as customers. Rather as the world evolves and technology brings consumers closer, the ever-increasing customer expectations, competition and technological change, are making businesses strive to become 'partners' to their stakeholders.

To achieve this goal, organizations seek the help of quality profession that supports businesses to develop a customer-centric quality culture to help them:

- **Recognize** that it is the customer, not the company, that defines what quality means
- **Understand** product and service quality through their customers eyes
- **Share** their quality performance with customers
- **Collaborate** with customers to improve product/service quality and resolve problems

Through the 2020 theme, the World Quality Council is providing companies with the opportunity to highlight how quality can help to create customer-focused organizations.

On the second Thursday of November every year, the world celebrates World Quality Day (WQD). The Chartered Quality Institute uses WQD as a campaign to promote quality management for the purpose of

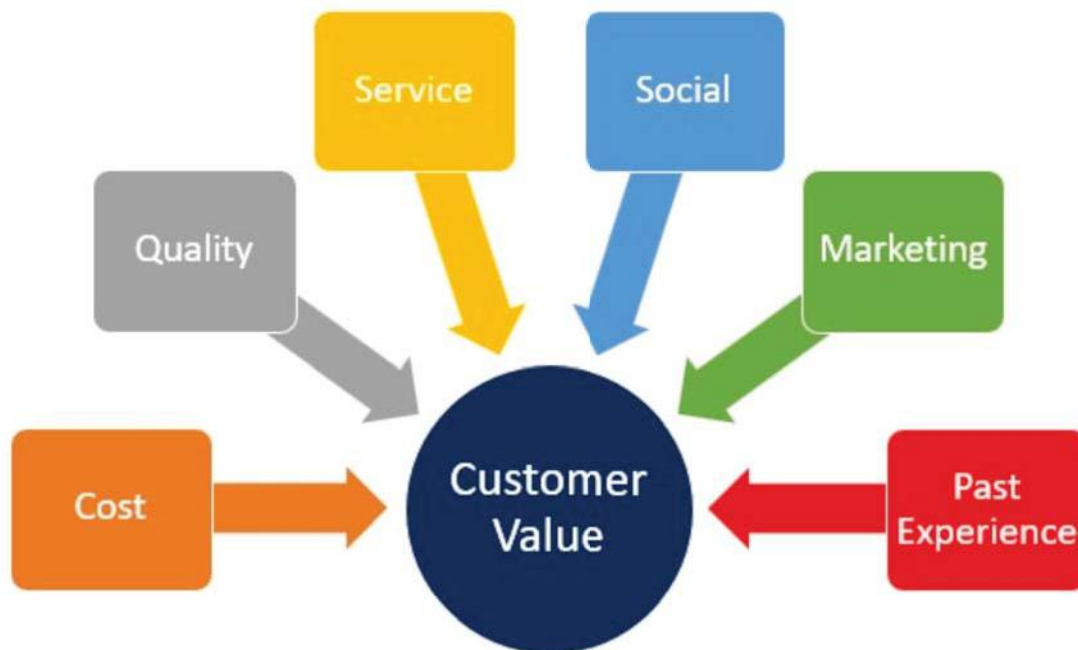
advancing quality management for the benefit of society, through its members and partners.

A WQD theme is selected which is wide enough to provide a hook for most organizations. Sometimes, organizations also come up with other themes aligned with their corporate strategy and initiatives.

What is customer value?

The dictionary defines value as the regard that something is held to deserve; the importance, worth, or usefulness of something. The synonyms are: merit, worth, usefulness, use, utility, practicality, advantage, desirability, benefit, gain, profit, good, service, help, helpfulness, assistance, effectiveness, efficacy, avail, importance, significance, point, sense. Given the wide variety of meanings that value has it implies that value is not same across consumers. For some value may mean price, for others it may denote benefit or the worth of something. So, there are consumers who want "value for money" and others who prefer "money for value".

In the global market, consumers today have wide choice. This means brands must try harder to attract their attention and cultivate their loyalty. Organizations that intend to win the diversity of consumers must therefore create and communicate value in everything that they do. Customers are not just moved to a purchase by the attributes of a product but also put a lot of premium on the company culture. They evaluate a company and the product on various parameters – was the product manufactured in a unit that respects labor? Was the product manufactured respecting environment? Will the product add to the landfill when past its expiry date? – questions that go way beyond what traditionally a buyer was investigating even a few years back. Consumers



Building a customer-focused strategy means the customer and their needs come first as a way to reach brand goals and grow your business. Important decisions begin and end with the customer based on how it benefits them and offers them value.



come to the market with high expectations but have little loyalty to spare if a brand fails to meet them.

Organizations hence are working in a buyer's market and must learn to respect their needs and choices. Hence, customer value can be said to be the perception of what a product or service is worth versus the possible alternatives. Here worth means whether the customer feels they got benefits and services over what they paid for the product or service.

It would be a fallacy to equate what the customer pays for a product or services with its price. Customers are also paying in terms time, effort, energy, and inconvenience.

For the customers, this value translates into advantages or quality of the product, service, image and brand of the company or the brand of the product, values, experience, success in using the product and so on.

The first step to communicating value to customers, is understanding what value really is, and what it is not.

In simple terms, customer value is the satisfaction the customer experiences or expects to experience by taking a given action for which there is a cost. By given action we traditionally mean a purchase, but it could also be signing up for something, casting vote or a visiting someplace. The cost refers to anything a customer must

forfeit in order to receive the desired benefit, such as money, data, time, knowledge.

In any organization, the internal chain of sourcing, operations, processes, sales, marketing, and customer service together go up to create customer value. Every action, internal or external, forms components that affect customers directly or indirectly and help them form their perception of the company.

The efforts that an organization makes to create value are measured in the customers' perception of that value. A company might be making a very superior product than those existing in the market. But consumers will not buy it they don't like it or need it.

Today's consumers are spoiled for choice and will only buy a product if they perceive its value exceeds that of comparable products available in the market. Consumer choices are not limited to consumer goods. Today consumers take an informed value-based decision for everything – be it visiting a restaurant, ordering food online, buying a car or a house – the market offers varied choices at every price point. Also, it is not just the price benefit but many factors that go into informing a customer decision.

Since customer value is all about subjective perceptions, and can be influenced, marketing and communication have a huge role to play in creating

customer value.

How is customer value created?

Companies can create customer value by focusing on processes and systems as much as on mindset and culture. Changing mindset and culture are difficult, they are important for long term success. These, along with systems create great experience and value for the customer.

Customer value is not constant and changes during the use of a product or during the customer journey. Value exhibits right from the points of purchase intent, to shopping, actual purchase, installation or start-up, to the use and even the re-sale of the product.

Apparently, companies that create sustained customer value increase customer satisfaction and the customer experience thereby increasing loyalty, market share, price, and reducing errors by increasing efficiency. With higher market share, companies reap higher profits.

A customer's value needs change over time, and it is important to get customer feedback to continuously improve value. Organizations must understand what a customer perceives as value – how they view a competition's product, what is important in their buying decision – is price important or benefits, is the product delivering what the customer believes is important, etc.

Some ways that companies create values are: offering a price that makes the customer believe they are getting more than what they are paying for; value adding to the product or offering something extra over competition; making buying convenient for the customer; providing price justification, not just a price; giving a product that works as it is meant to, is easy to understand and use; making the customer feel valued; making it easy for the customer to contact the company are among some of the ways companies can create customer value.

How customer value is measured

While there are many equations and models for measuring customer value in the marketing discipline, what is clear is that value does not refer to price. Value in fact is the perceived benefits that a consumer stands

to gain in the context of price. This makes cost only a part of the equation.

For a customer the value of two identical products at competitive prices may still not be the same. Here brand value comes into play. For instance, Tata as a brand has value in the eyes of the Indian consumer that another product with similar attributes and pricing from a local brand may not have. It will have to struggle to compete with the Tata product because it does not share the same customer perception.

The drivers of value include, product function, points of differentiation; quality of service; marketing; branding; price; existing relationships or experience; personal bias from experience and upbringing, etc.

These drivers impact a customer's perception of value. But unfortunately, organizations cannot control all of these drivers. Each individual customer ranks these differently in importance. For example, some love brands and don't mind the price, while others look for a bargain. Some put personal equation with the organization above convenience.

Organizations need to identify groups based on their shared values and create products and messages that resonate with them. Importantly, they must think of doing everything in terms of delivering value to the customers and audience and understand that customers have choices and you are competing against these competitors. It requires a thorough understanding of the market and then

breaking it down into individual segments with unifying characteristics that will respond in the same way to a given value proposition. Companies must always be on the lookout to create new value propositions. They must also explore the right channels to communicate at the right time and in the right place with the customer. An important prerequisite to creating value is the ability to listen to customers. This helps learn their perceptions about what the goods and services being offered by the company and change the offering based on the insight.

Summing up

Creating customer value is not a one-time exercise but requires continuous efforts on the part of the organization. In these days of hypermarkets and e-commerce it is more important than ever to listen to the customer and create values that win their loyalty. ▶

Source: Secondary research & media reports



1 Happy Customer Generates 9 Positive Referrals...



CONSUMERS SEEK QUALITY AND SAFETY ASSURANCE

For consumers in the pandemic situation, quality and safety are more important values in a product than price.

TYPE THE PHRASE “Can I get Coronavirus from...” into a search engine and the window will autocomplete your question with an array of options ranging from the straightforward to the seemingly ridiculous. In the current environment, where facts can be fluid and there is an expanding list of information sources that consumers turn to, there's bound to be uncertainty and uncertain behavior associated with this global health emergency.

The global health crisis with no cure in sight and no clear path of progression has made people

uncertain. They want answers and in the absence of any definite one, they are turning to the internet to answer their queries and allay fears. The internet is but a hub of unverified experts who are spouting about symptoms and cures with impunity. A simple search on coronavirus into the search engine throws up thousands of answers, some relevant but most unsubstantiated opinions without any scientific basis and are potentially harmful.

The evolving consumer behavior shows a lack of trust in established practices and products. It is in search

of assurance that consumers are flocking to search engines for the lack of more authentic or easily accessible resources. It is becoming apparent that in the coming months more and more consumers will be seeking greater assurance in the products they buy. They would want to know that these products pose no risk and are of the highest quality. They need to be convinced that the products come with the highest safety standards and efficacy. This requirement would particularly extend to products in the health, hygiene and food categories.



As communities reopen and people are more often in public, the term “physical distancing” (instead of social distancing) is being used to reinforce the need to stay at least 6 feet from others, as well as wearing face masks.

This lack of trust in general means that manufacturers will have to go the extra mile to build customer value and also convince consumers of the value proposition presented in their products. As the demand for assurance intensifies from consumers, industry players must work on their communication and marketing skills to clearly communicate with the consumers as to why their products and supply chains should be trusted. Since the pandemic shows no signs of abating anytime soon, in the longer term, the current consumer sentiment of fear and distrust may have a profound impact on consumer markets requiring a rethink by manufacturers, retailers and other stakeholders on customer value. The industry will need to understand the changing patterns in how shoppers evaluate purchases and the benefits they consider as key to consider a purchase.

Not surprisingly, a recent global study by Nielsen on premiumization, finds the product benefit consumers were most willing to pay a premium for are those with high quality assurances and verifiable safety

standards. Such is the demand for these two attributes that globally, 49% of consumers are highly willing to trade up in price for this benefit, the report said.

If we hark back to the initial days of the coronavirus outbreak, we would remember the many media coverage on stores being stripped bare of sanitary and hygiene products, canned foods and other pre-packaged durables. Fights broke out as consumers went into the hoarding mode. Since hygiene is being promoted as a guaranteed defense against the virus, these products attracted the maximum traction. Apparently, it is products that have inherent guarantees against the virus will attract more consumers.

According to the report, Vietnam and China, among the countries hardest hit by the pandemic, were also the markets that exhibited that highest sentiment pertaining to quality and safety assurances – 65% and 61% of consumers in those markets, respectively, were “highly willing” to spend a premium.

The purchase pattern of panicked consumers during the pandemic

throws up lessons for manufacturers and marketers. For consumers today, it is these assurances built into products that are the guiding factor in establishing trust. As we move towards normalcy, these factors would continue to guide consumer purchases. The study also found 34% of consumers in the U.S. were interested in premium and predicts that this percentage will likely rise under the ongoing circumstances.

Another discernible thread in consumer behavior emerging from the pandemic is the willingness to switch brand as consumer priorities change and decision processes are more fluid. The top-ranking reasons for consumers changing brands according to a Nielsen study is value followed by quality. However, this priority is set to change in the uncertain climate as consumers reprioritize quality as the primary consideration for purchasing a particular brand. The second

prominent change in consumer behavior being predicted is the lowering price sensitivities, at least in the near term. Though the study found larger sections of consumers in China, Vietnam and the U.S. (37%, 40% and 38%) saying they were always influenced to try new brands because of better value; it would behoove companies to build strong stories around quality as it may better serve their interests. The quality concerns of consumers would lead them to seek these factors upfront and companies must weave it into their products as a central USP rather than price or value, which will not be the primary levers in a less price-conscious environment that is taking shape.

Many companies and brands are already working on these parameters. For example, in India, food aggregator platforms like Zomato and Swiggy are making all out efforts to communicate the hygiene practices of their delivery valet as also of the restaurants that are part of the platform by painstakingly highlighting the steps that they are taking to deliver these quality and safety assurances. They take the consumer through the steps being taken to ensure healthy, hygienic and safe provision of products, especially for categories that are more susceptible to contamination, such as fresh food.

In most cases, this involves just bringing existing practices and precautions to the forefront and familiarizing the consumer with them to allay their concerns. For some it has meant ramping up hygiene-monitoring and other safety precautions mandated for the pandemic. Companies are realizing that consumers are willing to pay a premium to access products and services that promise a safe experience. That said, brands and retailers must also bring in pricing adjustments to rule out price gouging in segments like face masks and sanitizers that have become staple during the pandemic. Keeping prices in control is sure to attract goodwill of the consumer in the new normal.

With stories coming out from

China of contamination of food products coming into the country from other destination as also past experiences with bird and swine flu is making consumers conscious about the origin of products. Increasingly, the origin of a product will be under greater consumer scrutiny. This could also prove beneficial for local producers because of their focus on locally sourced inputs, such as ingredients in food products, that can be easily traced by consumers. It is expected that more consumers would now prefer locally produced and sourced products especially food the distance of the supply chain would minimize the possibility of exposure to COVID-19. Conversely, consumers in countries that are facing widespread outbreak may seek food products from countries that are in a relatively safer zone. This is in contrast to pre-outbreak global scenario when, according Nielsen, 21% of global consumers were willing to pay a premium for a product that originated from a specific country famed for producing that product.

There is loss of confidence among consumers in general and brands and retailers must address it by making the origin of product apparent on product package or label.

As consumers prefer shopping for most of their needs online, to allay their fears regarding delivery riders carrying the virus with them, delivery companies and platforms have adopted several innovative measures to assure consumers. From contactless deliveries to sharing the temperature readings of vendors and

valets, they are taking all kinds of measures. Delivery riders have become the lifeline for many Indian consumers, as they bring to their doorstep everything from food, groceries to medicines. Many delivery companies have set up rigorous test protocols on WHO mandated lines for their staff and have made the process known to consumers through their websites or app platforms. Pictures are uploaded on relevant platforms showing the maximum possible safety measures being followed in cooking, packaging and delivery of food by restaurants.

Trends from markets across the globe show that sales of hygiene and health products that can help protect people and ensure a sanitary environment like hand wash, face masks, disinfectants and all-purpose cleaners are the highest. In the lockdown period people began hoarding packaged foods, drinks, frozen and canned goods fearing a prolonged crisis. Pandemic pantries became the norm and consumers even shunned fresh fruits and vegetables for the fear of contamination from the virus. However, later as the lockdown eased, consumer fears have subsided mostly.

Since the COVID-19 pandemic shows no sign of relenting anytime soon and the vaccine is also far away, governments across the globe are encouraging consumers to return to their pre-COVID routines but observe all mandated precautions. The lockdowns wreaked havoc on economies and the health cost of the virus is crippling. The pandemic led to mass scale job losses and salary cuts. Economies are in the downturn and the projections are dismal. Yet, it is important to contain mass hysteria regarding the pandemic and convince consumers to return to a more normal life. Companies can do that by assuring the consumers of highest quality and safety. Then only can we hope to return to a normal life in the New Normal. ▀

Source: Secondary research & media reports



The personal hygiene market is set to cross \$15 billion by 2023, and the hand sanitizers segment alone will be worth more than Rs 2000 crore by the year 2025.

Access to **Safe Drinking Water** is a Human Right

KENT

Mineral RO™

Water Purifiers

HOUSE of PURITY

Make Water
100% Pure
and Protect Your Family
from Waterborne Diseases



KENT TECHNOLOGY

Removes Dissolved Impurities
Retains Essential Minerals
Multiple Purification

RO + UV + UF + TDS Control

Kent Deta Hai

**Sabse
Shudh Paani**



**Customer
Experience
At The Crux Of**

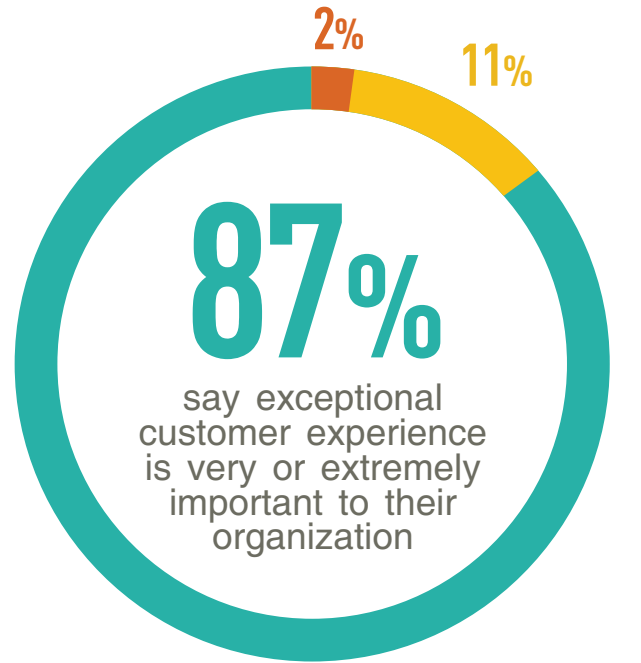
BUSINESS GROWTH

Good customer experience is fundamental to a long-lasting customer-business relationship.

CUSTOMER EXPERIENCE (CX) is a component of the total customer value and far more important to retaining customers than anything else. A bad customer experience is guaranteed to drive people away. It will also stop consumers from returning as they are not about to forget the bad experience in a hurry. On the other hand, a positive customer experience will bring back repeat orders as customers will associate it to their first good experience. However, in the absence of tangible ROI on investment in enhancing consumer experience, many companies are wary of making such investments. It is foolhardy not to do so as today's consumer is trapped in the sea of sameness, with little to distinguish one product from another except perhaps the value and experience.

A PwC report, 'Experience is Everything', found 42% of the 15,000 consumers willing to pay more for a friendly experience and 52% of respondents said they would be willing to pay more for fast and efficient customer experience when shopping.

A 2019 Forbes report had shared 50 statistics proving the value of customer experience for businesses. Customer experience mindset was responsible for driving revenue 4-8% higher for companies in comparison to the competition. Not only this, it also said that companies leading in customer



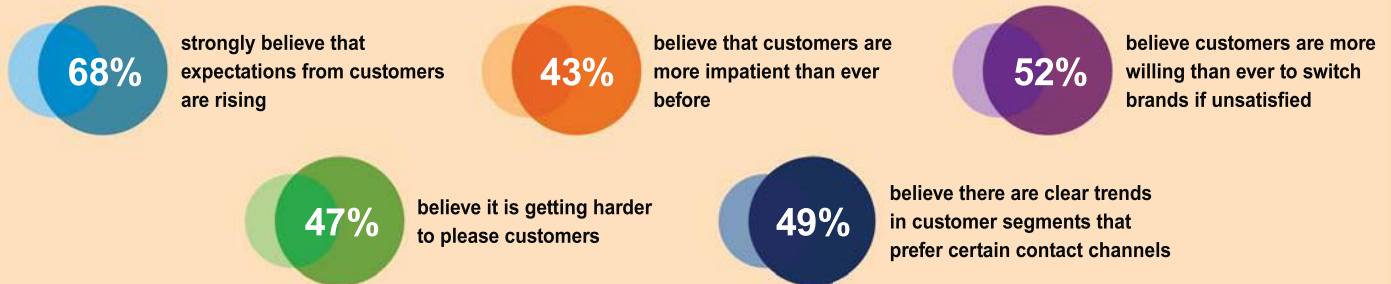
- Not so important or not at all important
- Somewhat important
- Very or extremely important

Customer Experience (CX)

moves beyond just one transaction from start to finish, and instead is the overall perception consumers develop after an encounter – of any kind – with your brand.



Customer Behaviour Observations



experience outperform laggards by nearly 80%! Further, 84% of companies that work on improving their customer experience report an increase in their revenue.

For 96% of customers, customer service is an important factor in their decision on loyalty to a brand. For 73% of consumers, a positive experience was key in influencing their brand loyalties. Customer experience does not only impact consumer decision but also detracts from their quality of life, said 77% of consumers polled.

If brands want repeat customers, they must focus on customer experience as satisfied customers are five times more likely to purchase again and four times more likely to refer a friend to the company.

Good customer experience also impacts employee engagement as customer-focused companies have 1.5 times more engaged employees than others. Those companies that promote initiatives to improve their customer experience also see employee engagement increase by 20% on average.

There's more good news for customer-focused companies as the report says such organizations with engaged employees outperform the competition by 147%.

If you have wondered why your customer is switching brand, the top reason could be that they feel unappreciated. If you want your customers to view the brand more favorably then seek their feedback as 77% of consumers appreciate companies that seek out and apply customer feedback.

Positive customer experience translates into higher customer spend as they are likely to spend 140% more after a positive experience than if they had negative experiences.

Further, companies that establish an emotional connection with customers outperform the sales growth of their competitors by 85%. It makes business sense to invest in customer experience as a 2% increase in customer retention equals to profits a company can have by cutting costs by 10%.

The bottom line: Customer experience is more valuable to your brand than it is to the customer.

How can companies ensure good CX?

In our online world today, delivering critical customer experience is dependent on a good website experience. A modern website designed that allows visitors to glide through the sales funnel till they make the payment and beyond that to tracking orders till it arrives at their doorstep will attract more customers and also retain repeat ones. Consumers today demand speed, convenience, knowledge, and friendly service and are willing to pay a premium to get those things. They have little patience with slow loading websites, unclear instructions and shoddy service.

Time is at a premium

It's all about speed now as many e-commerce platforms will tell you. Consumers have little patience to wait for their deliveries in this era of instant gratification. From the website to your delivery, all must be accomplished in the minimum time. More people opt for same day delivery paying a premium. Over 40% of the respondents to PwC's Global Consumer Insights Survey said they would willingly pay extra to get same-day delivery. What it means is that consumers want convenience and are happy to pay a little extra for it.

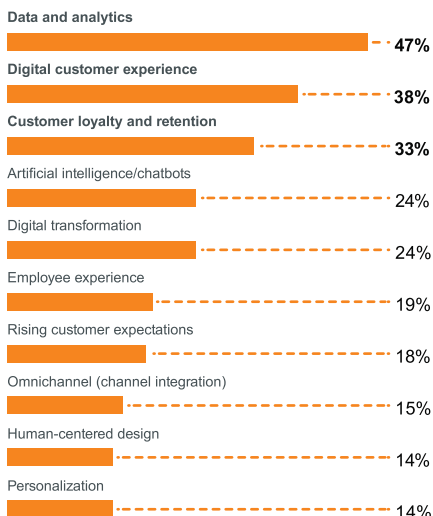
This need for speed also extends to the answers that customers seek. Fast loading websites and fast answering service agents in chat boxes go along to make a responsive company and a happy customer.

Tell me why

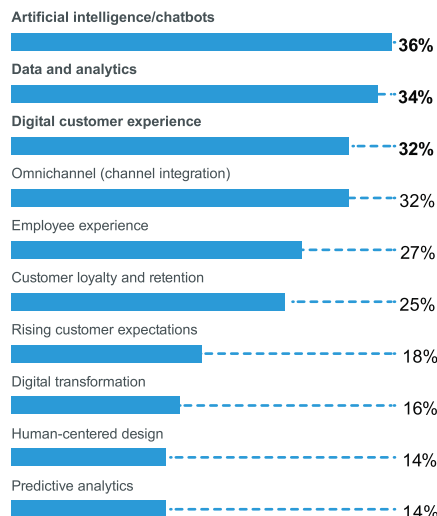
Today's customers are knowledgeable thanks to the vast internet resources at their fingertips. Before they purchase a product, most conduct research and even price and feature comparisons. When they come to a brand website, they may have some unanswered questions to which they would want speedy answers. That makes knowledge an essential aspect of customer service. Customers are seeking answers because they

Top Customer Experience Trends for 2020

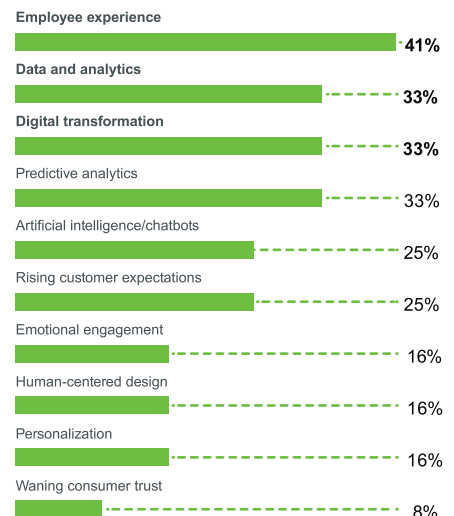
Top 10 CX trends according to CX practitioners*



Top CX trends according to solution providers*



Top CX trends according to industry commenters*



haven't been able to answer it on their own. It makes business sense to be able to satisfy their thirst for knowledge.

So crucial is employee knowledge in this regard that the PwC report found 46% of consumers would abandon a brand over uninformed personnel attending them. Tellingly, only 38% of the respondents found customer service employees they spoke to understand their needs.

The logic for this kind of consumer behavior is simple. When true knowledge is shared by employees, it promotes trust and confidence in the customer regarding the brand. Lack of knowledge on the other hand erodes customer confidence in the quality of the business. Sharing adequate knowledge with the customer will make them want to return.

It is essential then, to educate the staff who attend to customers on product, service, and business, so that they can clear customer doubts and remove any roadblocks to converting interest into purchase. Knowledgeable agents meet customer expectations and improve customer experience.

Convenience through customer journey

Speed and convenience go hand in hand. However, there is little more to customer convenience than just the speed at which an app or website loads. While automation helps improve customer experience, only 3% of consumers said they wanted the process to be wholly automated. For customers, convenience should be spread across their journey on the website and not just the main transaction. From making it convenient to find the information they're looking for when searching, to contacting agents, to the ease of delivery process –

every aspect of the process plays a role in customer convenience.

How friendly is the service?

A customer-friendly attitude wins over even the toughest customers and is important in customer service. How you communicate with the customer, determines for them how friendly you are. Most business savvy websites have representatives online who are available to answer queries and even guide customers in deciding their purchase choices. When shopping online, consumers cannot touch or see the products as they can in an offline store. Thus, they rely to a large extent on these agents to help them make the choices. A friendly representative even though faceless makes a lot of difference to the customer. When a positive relationship is struck, the customer feels confident to return for more purchases.

The basic rule of “service with a smile” works in the online space too. Customers who are treated with respect and receive prompt response remember these small courtesies.

Conclusion

The importance of customer service cannot be overemphasized. It encompasses the whole gamut of consumer journey and it's vital that customers have a great experience in store or online when dealing with employees. Customers must have an enjoyable time when using company website. Customer-friendly service that is quick, responsive, and easy to use is important to ensure customer experience that brings the customer back to the store – online or offline. ▶

Source: Secondary research & media reports

TOUCHSTONE OF



QUALITY



Quality Council of India, a pioneering experiment of the Government of India, is responsible for ensuring the highest standards of quality in the country.

THE QUALITY COUNCIL of India (QCI) was set up in response to the rising need for a body that could act as the touchstone of quality in the country. It is a pioneering experiment of the Government of India in setting up organizations in partnership with the Indian industry.

Around the early 90s a need was articulated for the establishment of an accreditation body in the country. The purpose of this body would be to establish internationally acceptable mechanism for recognition of conformity assessment results. An accreditation body for laboratories was already functional under the Ministry of Science & Technology. In pursuance of this objective, a committee which included various concerned ministries and stakeholders including industries was established to make recommendations. The work of the committee was coordinated by the then Department of Industries (Department of Industrial Policy and Promotion). The recommendations of this committee were submitted to the Cabinet in 1996. The need for establishing an organization jointly by the Government and the industry and the need for the organization to be self-sustaining and not part of the government, were among the key recommendations.

As a result of these recommendations, the Quality Council of India was set up as a non-profit autonomous society registered under Societies Registration Act XXI of 1860. Its purpose was to establish an accreditation structure in the country and to spread quality movement in India by undertaking a National Quality Campaign.

QCI is governed by a Council comprising of 38 members including the Chairman and Secretary General. The Council has an equal representation of Government, Industry and other Stakeholders.

Leading a nation-wide quality movement through various initiatives

In 2007, while inaugurating the 2nd National Quality Conclave held on February 9, 2007 at New Delhi, the then Honorable President of India, Dr APJ Abdul Kalam, assigned the mission for QCI as "The National Well Being". He said, "My definition of national prosperity index is equal to GDP including quality of life for all coupled with value system. It is essential to ensure that all the citizens are empowered with good quality of life encompassing nutritious foods, good habitat, clean environment, affordable health care, quality education with value system and productive employment leading to the comprehensive qualitative development of the nation. There is a strong urge in our society to come out of

century old "Developing Country" brand name to "Developed Country" status. To become developed country, we must have competitive edge in the international market. Quality is very essential to achieve this. We must use competition as an opportunity to improve our quality and to transform a technology importer to technology exporter. QCI must become an organization serving the one billion people of the country. My best wishes to all for success in the mission of promoting prosperity through quality"

With the mission to lead nationwide quality movement in the country, QCI works in partnership with all stakeholders to emphasize the importance of adherence to quality standards in all spheres of activities. This quality adherence is aimed primarily at promoting and

protecting interests of the nation and its citizens.

QCI plays a pivotal role in propagating, adoption and adherence to quality standards in all important spheres of activities including education, healthcare, environment protection, governance, social sectors, infrastructure sector and such other areas of organized activities that have significant bearing on the quality of life and

well-being of the citizens of India.

With the aim to create awareness among citizens and empower them to demand quality, the QCI leads a nationwide quality movement in the country through National Quality Campaign. Under this campaign it aims to promote and protect the interests of consumers by encouraging manufacturers and suppliers of goods and service providers to adopt and adhere to quality standards and tools.

To establish a national quality consciousness, it is imperative to develop capacities at the level of governments, institutions and enterprises for implementing and institutionalizing continuous quality improvement. The QCI works in this direction as a part of its mission.

It is also the mission of QCI to develop, establish and operate national accreditation programmes in accordance with the relevant international standards and guides for the conformity assessment bodies. These bodies certify products, personnel, management systems and carry out inspection. The laboratories undertake testing and calibration. The programs aim to provide standards and guidance in areas of organized activities that have significant bearing in improving the quality of life and well-being of the citizens of India.

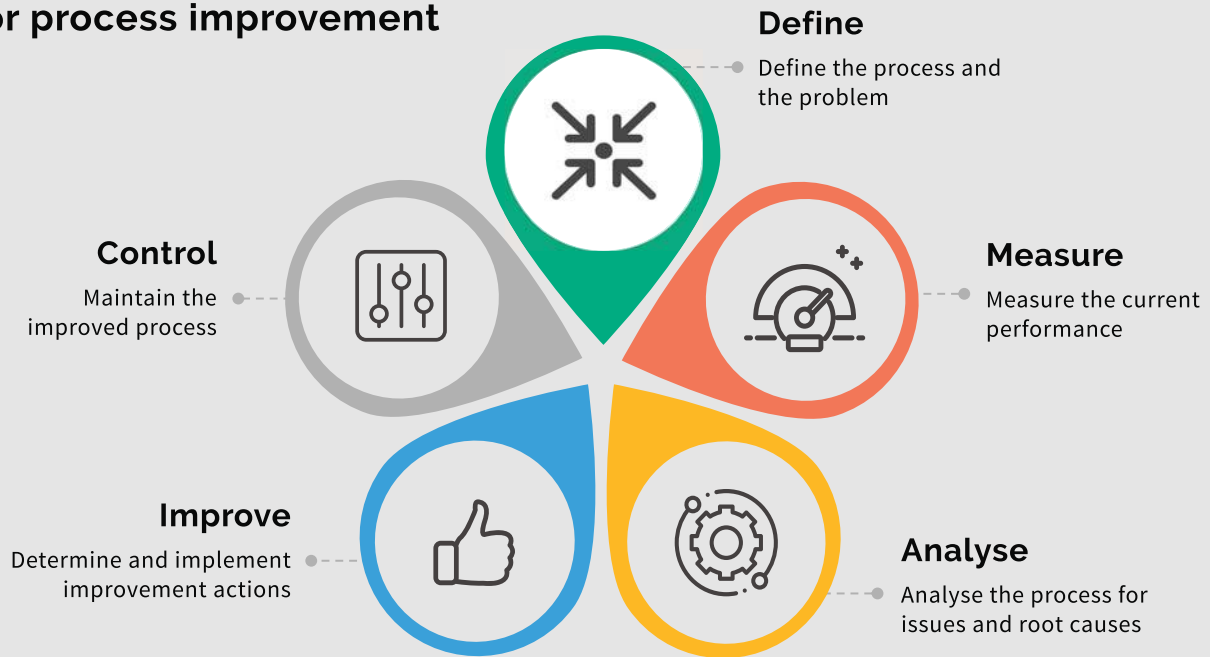


My definition of national prosperity index is equal to GDP including quality of life for all coupled with value system.

**– Dr APJ Abdul Kalam
Former President of India**

SIX SIGMA METHODOLOGY

A set of methods and tools for process improvement



The QCI also develops, establishes and operates National Accreditation Programmes for various service sectors such as education, healthcare, environment protection, governance, social sectors, infrastructure sector, vocational training, etc. These programs are based on national/international standards and guidelines. In case such standards are not available, the aim is to develop accreditation standards to support accreditation programs.

The QCI also works to build capacities in areas of regulation, conformity assessment and accreditation to overcome TBT/SPS constraints.

It also encourages development and application of third-party assessment model for use in government, regulators, organizations and society.

An important mission of the QCI is to promote quality competitiveness of Indian enterprises especially MSMEs through adoption of and adherence to quality management standards and quality tools.

Promoting the establishment of quality improvement and benchmarking center, as a repository of best international/national practices and their dissemination among the industry in all the sectors.

The QCI aims to encourage industrial/applied research and development in the field of quality and dissemination of its result in relevant publication including and trade journals.

Building capacities including development of appropriate quality accreditation mechanism for other emerging areas that have significant bearing in improving the quality of life and well-being of the citizens of India such as food sector, oil & gas, forestry, agriculture /animal husbandry, warehouse, pharmacy, etc., or as the need may arise from time to time, also fall under the missions of the QCI.

It also works to facilitate effective functioning of a National Information & Enquiry Services on standards & quality including an appeal mechanism to deal with unresolved complaints.

Another important goal is to develop and operate an appeal mechanism to deal with unresolved complaints.

Harnessing youth power

An important addition to the QCI is the Project Planning & Implementation Division which came in 2015.

Recognizing the importance of enlisting the youth in India's quest for quality and the many opportunities that exist within the government where youth can contribute, this department was visualized. The government has a lot of information and data that can yield rich insights and enable better governance framework. The analysis and measurement of this vast amount of data requires a

committed workforce. The division was envisaged to plug this gap. The youth workforce could also be utilized for implementation of various schemes under the overall guidance of the Department/Ministry.

Recruiting such a workforce for short term is not possible for the government and hence a provision was needed to be created in semi government organizations like Quality Council of India which could fill this long-recognized void.

The QCI hence, embarked on setting up a team of young professionals who could help the government from outside on key issues and provide support wherever required.

Setup with this primary motivation, the Project Planning & Implementation Division has evolved as a unit. It works closely within the organization drawing up expertise from the Boards. The on-ground implementation of projects is managed by the team at the backend. The group of young professionals associated with the division work with various ministries and departments on strategy and monitoring projects.

The division received its first project in September 2015 which involved working with senior bureaucrats in 20 central ministries to improve quality of public services by analyzing citizens' grievances.

The success of the model can be gauged from the fact that this initiative has gained wide acceptance across ministries and departments and has helped many initiatives within the government.

The Project Planning & Implementation Division works with various ministries in the government both at center and state level. Broadly, they work on two types of projects:

Strategic Projects: These typically involve working with government and assisting bureaucrats in problem solving and managing an issue of importance. Such projects are extremely diverse.

Implementation Projects: Such projects typically involve the Project Planning & Implementation Division taking over the implementation of a particular government scheme or initiative and executing it.

The Division has by now worked with a number of ministries on projects, including Ministry Urban Development, Ministry of Drinking Water and Sanitation, Ministry of Skills, State Government of Gujarat, National Skills Development Corporation, Ministry of Human Resources Development, National Council for Teacher Education and others.

Some of the key government schemes and initiatives that the division is working on includes – Swachh Bharat Mission, Make in India, Pradhan Mantra Ujjwala Yojana and Pradhan Mantri Kaushal Vikas Yojana.

Project Analysis and Documentation (PAD) Division

Another important wing of QCI is the Project Analysis and Documentation (PAD) Division. It handles projects on the

Potential Areas Of Development

 <p>Benchmarking</p> <p>APEDA, Ministry of Agriculture</p>	 <p>ICMED +</p> <p>AIMED</p>	 <p>Biomedical Skills Certification</p> <p>Indian Biomedical Skills Consortium</p>
 <p>RMCPSC for Dry Mix</p> <p>RMCMA</p>	 <p>Security sTar Agencies Rating Scheme</p> <p>Central Association of Private Security Industry</p>	 <p>Lead Safe Paints</p> <p>International Pops Elimination Network (IPEN)</p>

design, development, and implementation of voluntary conformity assessment frameworks for governmental, inter-governmental, regional, and global organizations. The division is responsible for driving noble initiatives that have national, regional, and global relevance. QCI through this division offers solutions to various government ministries/departments/organizations, industrial bodies, international donor agencies, developmental organizations, and inter-governmental bodies such as FAO of the UN, UNFSS, UNCTAD, SAARC Agriculture Center etc.

PAD is currently handling various voluntary certification schemes cutting across sectors. These schemes cover from Agriculture [INDGAP, Voluntary Certification Scheme for Medicinal Plant Produce (VCS-MPP)], Food [Q Safe, IndiaGHP and IndiaHCCP], Healthcare [AYUSH Mark, Indian Certification of Medical Devices Scheme (ICMED)], Industry [STAR Scheme, RMCPSC], Regulators [VCS-Remotely Piloted Aircraft Systems], and Personnel Competence [VCS-Traditional Community Healthcare Providers, Biomedical Skill Certification Scheme (BSCS)]. The division strives to use instruments like benchmarking to gain international equivalence with global standards bodies and to map the same on the standards map of the ITC of the UN.

Conclusion

Quality Council of India through its numerous initiatives is guiding India on the path to achieve quality in every field of activity that is internationally comparable and acceptable. Its agenda can be summed up as ensuring that the citizens of India get the best possible quality at par with international quality parameters in every field. ■

Source: Secondary research and media reports

“ **NABL Accreditation Is Increasingly Being Used By Regulators And Government Of India To Ascertain The Quality Of Products** ”



Mr. N Venkateswaran, CEO, NABL

Q Thank you for accepting the interview of our magazine. Please explain the importance and the role NABL plays in Indian Quality infrastructure?

The laboratory accreditation program in India was initially setup by Department of Science & Technology, Government of India in 1982 with its name as “National Coordination for testing & Calibration Facilities (NCTCF)” for providing accreditation services to testing & calibration laboratories. NCTCF, with the cooperation of India’s National Metrology Institute (NMI), National Physical Laboratory (NPL), provided accreditation to calibration laboratories. Subsequently in 1993, NCTCF was renamed as “National Accreditation Board for Testing and Calibration Laboratories (NABL)”.

In the year 1996, in reference to the Indian National Scheme for Quality and Conformity Assessment, vide File no.20 (8)/90 – PP&C, Department of Industrial Development, Ministry of Industry, Government of India has approved “The National Accreditation Board for Testing and calibration laboratories to be set up as a society under the Societies Registration Act. It will be fully answerable to the QCI and at the appropriate stage be brought within the fold of the society under which the QCI is set up”.

Thereafter, NABL was registered as a society on 12th August 1998 with the objective to promote, coordinate, guide, implement and maintain an accreditation system for laboratories. NABL operated as an autonomous body under the aegis of the Department of Science and Technology, Government of India.

In the year 2016, in pursuance of cabinet decision (February 1996), NABL along with the support mechanism existing under the Department of Science and Technology, Ministry of Science and Technology was transferred to the Department of Industrial Policy and Promotion (DIPP), Ministry of Commerce and Industry and subsequently transferred to QCI (Quality Council of India) as one of its Board.

In the year 2017, NABL society regn. no. S/33451 has been merged with QCI society regn. no. S/30832.

Q Explain us on the activities / schemes currently being provided by NABL?

NABL is complying to ISO/ IEC 17011: 2017 “Conformity Assessment – Requirements for Accreditation bodies accrediting conformity assessment bodies”.

NABL is an accreditation body providing accreditation services to:

- Testing Laboratories as per ISO/ IEC 17025:2017
- Calibration Laboratories as per ISO/ IEC 17025:2017
- Medical Laboratories as per ISO 15189:2012

- Proficiency Testing Providers as per ISO/IEC 17043:2010
- Reference Material Producers as per ISO 17034:2016.

Q Is NABL accreditation only required for India or does it have any international prominence / recognition?

NABL accreditation is increasingly being used by Regulators and Government of India to ascertain the quality of products. Accredited Conformity Assessment Bodies (CABs) can objectively state conformance of product or service to specified requirements. NABL accreditation is one of the key criteria for laboratories to be recognized by various regulators.

NABL maintains linkages with the international bodies like International Laboratory Accreditation Co-operation (ILAC) and Asia Pacific Accreditation Co-operation (APAC).

NABL is a full member and a signatory to International Laboratory Accreditation Cooperation (ILAC) since 2000 (Testing ISO/IEC 17025- 2 November 2000, Calibration ISO/IEC 17025- 2 November 2000, Medical Testing ISO 15189- 2 November 2000, Proficiency Testing providers ISO/IEC 17043- 3 October 2019 and Reference Material Producers ISO 17034-22 July 2020) as well as Asia Pacific Accreditation Cooperation (APAC) Mutual Recognition Arrangements (MRA), which is based on peer evaluation.

Such international arrangements facilitate acceptance of test/ calibration results between countries which MRA partners represent.

Q What do you think makes NABL unique / stand out?

NABL is a truly 3rd Party independent organization which is impartial in all its activities.

NABL is committed to ensure integrity of its systems and operations at all times.

(We have our Impartiality policy available on NABL website).

NABL ensures:

- To carry out accreditation activities in a non-discriminatory manner.
- There are no constraints that might influence decision making.
- That it does not engage in any activity which could compromise its impartiality.
- That it does not provide consultancy to conformity assessment bodies, nor does it
- Undertake any conformity assessment activities itself. It does not promote the services of any specific body.
- Fair representation of stakeholders in NABL Board

NABL has always strived to increase the areas in which accreditation is being granted. We have recently added accreditation to software testing laboratories, Medical Imaging – Conformity Assessment Bodies (MI-CAB). We are exploring other areas where accreditation can make a difference in improving the quality of life to every citizen in the nation.



Mr. N Venkateswaran,

CEO, NABL is a B.E in Mechanical Engineering and M.S in Quality Management with 27 years' experience out of which 17 years with an Accreditation body. He has extensive knowledge in Quality Management standards and is six sigma black belt from Indian Statistical Institute (ISI), Bangalore. He has actively worked in development of standards and member of technical committees and is a renowned faculty in conformity assessment standards (ISO/IEC 17XXX series). He is also an APAC evaluator and has participated in evaluation of accreditation bodies in other economies. Mr. Venkateswaran initiated the concept of laboratory conclave and PTP/RMP conclave. He has headed all verticals of NABL with first-hand knowledge in Accreditation, Proficiency testing providers (PTP), Reference Material Producers (RMP), complaints and appeals. He spoke to The Aware Consumer on the important role NABL plays in India's quality consciousness.

Q Can you explain us with an example of how NABL activities are benefitting the common man / creating customer value?

This is a very interesting question. NABL accreditation covers numerous fields and disciplines.

Common man is benefitting from NABL accreditation in multiple aspects of daily life.

Testing laboratories of NABL cover a wide range of laboratories testing from all types of food, water and other chemicals to ensure the health and safety of these consumables to electronics we use, building materials, environmental testing, toys, etc.

Calibration laboratories of NABL provide the traceability of measurements to SI units, this can be seen in all types of measurements we make, one kg of rice we buy is ensured to be one kg, the one gram of gold to be accurate to one gram, etc.

Medical laboratories of NABL provide test results for a variety of parameters (Blood glucose, platelet count) which help medical professionals in accurate diagnosis. Recent COVID-19 and SARS-COV-2 virus detection can be one example.

Q What about the other programs such as the Proficiency testing Providers (PTP) and Reference Material Producers (RMP) accreditation?

PTPs and RMPs are specialized Conformity Assessment Bodies (CAB's) which help in maintaining the competence of the accredited laboratories.

PTPs conduct inter-laboratory comparisons on specific tests / parameters for a set of laboratories. The results from these laboratories are statistically analysed and a report on the performance of the participating laboratories is provided to them. Laboratories having successful PT participation usually have a robust quality system in place.

RMPs are specialized bodies which produce reference material, certified reference material (CRM). Use of these materials ensures the traceability to SI units / references is maintained. For example, a laboratory testing residue in a food product needs a reference material of the pesticide to compare with the test specimen. Accredited RMPs provide such sophisticated materials to laboratories.

Accreditation of PTPs and RMPs ensure that the laboratories are having avenues to periodically check their competence.

“Around 200 NABL accredited laboratories testing various products being used by the medical professionals such as ventilators, PPE, Sanitizers, Masks and calibration of medical devices ensured these products are meeting the requirements and helping in the fight against the pandemic.”

Q How did you tackle the various challenges faced in accreditation for examples misuse of NABL symbol?

To avoid misuse of NABL symbol, we made the certain requirements mandatory regarding use of NABL symbol on the reports issued by accredited CABs.

Any test report found with NABL symbol contains the NABL accreditation certificate number of the laboratory. The test parameters in the report are accredited by NABL. This helped reduce confusion and bring clarity. This provides an easy avenue to the end users for verifying the accreditation status of the laboratories.

NABL is improving upon its systems to ensure that accredited laboratories have continued compliance to international standards and common man can be assured of the quality of results from accredited laboratories

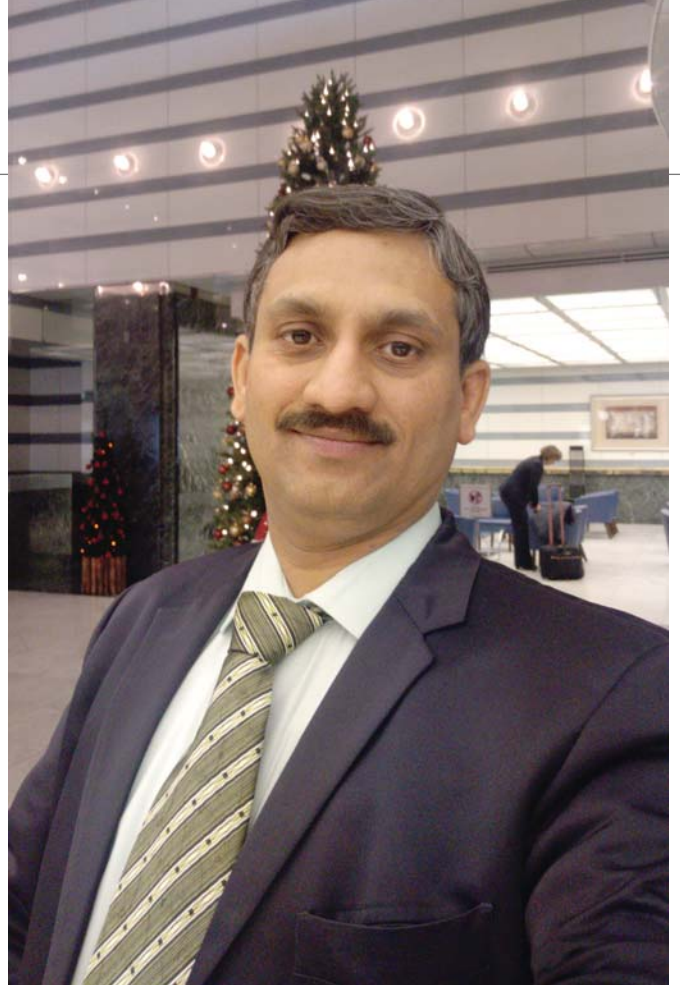
Q In the recent COVID-19 pandemic, ICMR has made it mandatory for private laboratories testing for SARS-COV-2 virus to be NABL accredited. Can you further explain on the NABL contribution in this regard?

ICMR is the regulator for the SARS-COV-2 virus testing and has made it mandatory that accreditation is the main requirement to list these laboratories for testing of the virus.

As we embraced the oncoming pandemic, a high demand for laboratories capable of testing RNA viruses through RT PCR technique was felt. However, testing of RNA Viruses through RT PCR is a highly technical in nature and it is very important that the competency and quality systems of the laboratory are up to the necessary requirements.

NABL accreditation ensures the competence and quality system of the laboratories are meeting international standards. One major challenge to NABL was to accredited laboratories in a record time to meet the demands of the nation.

This challenge to NABL was fulfilled by accrediting more than 550 private medical laboratories which are capable of testing RNA viruses through RT PCR and more than 500 of them are further listed by ICMR thereby increasing the capacity of testing.



This could only be achieved through the dedicated work of NABL Medical staff, assessors and Accreditation Committee Members and other innovative technical breakthroughs in simplifying the accreditation process.

Along with medical laboratories, around 200 NABL accredited laboratories testing various products being used by the medical professionals such as ventilators, PPE, Sanitizers, Masks and calibration of medical devices ensured these products are meeting the requirements and helping in the fight against the pandemic.

Q It is amazing to know about the contribution of NABL in a variety of fields that are affecting the livelihood of common man. One last question, as we move forward, please elaborate on what is your plan / vision for NABL?

NABL has always strived to increase the areas in which accreditation is being granted. We have recently added accreditation to software testing laboratories, Medical Imaging – Conformity Assessment Bodies (MI-CAB). We are exploring other areas where accreditation can make a difference in improving the quality of life to every citizen in the nation.

NABL will further work towards improving its accreditation systems and work on sensitizing common man in aspects such as importance of accreditation, checking the authenticity of accredited reports.

I thank Consumer awareness for providing the opportunity for sharing about how NABL accreditation is benefitting the consumers and urge your support in making every common man aware on aspects of NABL accreditation. ▶



Pyush Misra
Director,
Consumer Online Foundation

On-boarding The Call Of Vocal For Local

Indian brands that have invested in value creation through quality and brand building stood the test of time as consumers reposed their trust in them during the pandemic. For vocal for local to become a war cry, more Indian brands must work on creating customer value and brand salience.



VOCAL FOR LOCAL

MAKE IN INDIA

VOCAL ABOUT LOCAL

IT IS TIME FOR EACH INDIAN HAS TO BECOME 'VOCAL' ABOUT
THEIR 'LOCAL' PRODUCT AND MAKE THEM GLOBAL

PRIME MINISTER NARENDRA Modi's recently exhorted citizens to become vocal for local in a drive to make India 'aatmanirbhar' (self-reliant). The call was well received by various quarters including citizens. However, lacking a clear model, consumers are still struggling to understand what exactly local means. The call is certainly not to boycott foreign products. Rather, it aims to make a self-reliant or 'aatmanirbhar' India, with an emphasis on not only made in India, but also that there should be adequate promotion of local brands, manufacturing, and supply chain.

However, for consumers the value of a product has nothing to do with its country of origin or brand. There are numerous Indian brands that have over the years built a value and respect in the eyes of the consumers. The pandemic saw these brands that have been invested in brand-building through quality and customer value rise to the occasion, as consumers shaken by the fast spreading virus turned to the trusted names.

There are several Indian brands in the FMCG market that are leaders in the space and compete with international brands. In the food industry the vocal for local trend with respect to consumer demand is high with 60 percent of the industry dominated by made in India brands. Unlike the FMCG sector, where local brands dominate the Indian product space but have to compete with international brands in the personal hygiene,

cosmetic, and consumer durable segments, the food industry is being led by India in all the categories.

This change in consumer preference for India-made goods in the food sector is not sudden. A few decades ago, there weren't many Indian

brands and most of the branded food was imported. Indian consumers could also not repose much faith in the manufacturing standards of the local brands.

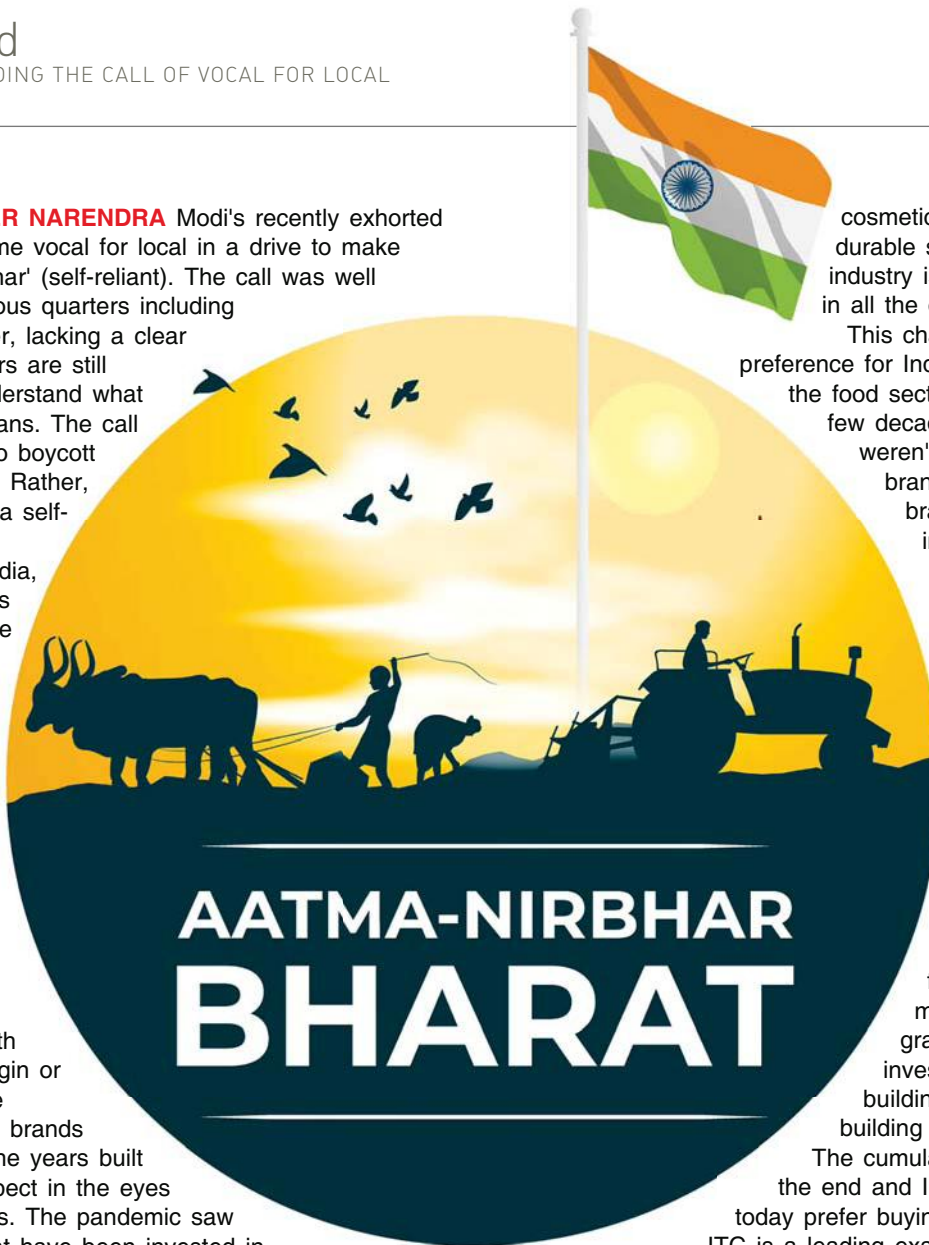
It took many years to change the perceptions of the Indian consumers and much effort went into it –

manufacturing facilities were modernized and upgraded and companies invested in brand building with a focus on building customer value.

The cumulative efforts won in the end and Indian consumers today prefer buying local brands.

ITC is a leading example in the Indian space of this change. Over the years, this Indian company has invested extensively in developing a portfolio of Indian brands. The company is known for its cutting-edge R&D and state-of-the-art manufacturing. Today, it is a revered brand known for creating iconic brands that can give a stiff competition to any international counterpart.

For the established Indian companies, the thrust on vocal for local has come as an opportunity to aggressively promote their brands. Companies are launching campaigns aimed at stoking Indian pride and



Over the years, this Indian company has invested extensively in developing a portfolio of Indian brands. The company is known for its cutting-edge R&D and state-of-the-art manufacturing. Today, it is a revered brand known for creating iconic brands that can give a stiff competition to any international counterpart.

highlighting their Indian roots exhorting Indian consumers to be proud of their heritage companies and brands.

Amul, another iconic Indian brand captured the imagination of the countrymen with its 'Amul, the Taste of India' branding and since its inception has held consumers in thrall not just with its pithy campaigns but more so because of the quality of its products.

Amul's story makes an inspiring read. In the mid-1950s it was launched in an Indian market dominated by multinational brands. But through consistent quality delivery, it not only carved a niche for itself but effectively toppled the International brands, capturing the popular Indian imagination and taste.

It is indeed a good initiative on the part of the government to push Indian brands through various initiatives. It is not only promoting Indian companies to manufacture quality products but also source raw material locally of optimum quality banning lower-graded ingredients.

The emphasis on also going global with local is part of the larger plan to make Indian products internationally respected and coveted. The logic behind promoting local brands for global markets is to not just to sell in global markets, but also to get appreciation in the valuation of India as a brand.

No drive for quality would be complete unless brands also target rural consumers with the same quality products. The pandemic hit urban areas have pressed the need for deeper penetration in the rural markets with quality products as part of the growth strategy.

Rural markets have been an important driver of growth for Indian brands and now as the growth has slowed down in urban areas, the rural market has become even more important as it is seeing a relatively better year on the back of a good monsoon. There is more cash in the hands of the farmers and also the a large section of the migrant populations still to return to cities.

The selfless service of retailers in keeping the consumers supplied even during lockdown and the continuing crisis, has won them respect of consumers. The retailers were quick to join online platforms or launched their own online services delivering for essential goods through their armies of foot soldiers that is the vendors. The pandemic gave them the opportunity to build their brand salience as also increase customer value through timely service and quality goods.

The companies that had invested consistently in brand

building over the years, were trusted and their services during the pandemic added to their value.

The PM's call to use local brands has certainly seen some traction from consumers on the back of the homegrown brands' services during crisis. But, as stated earlier, for the interest in local brands to become a vocal movement for local, consumers need to be educated on local – what is local, which brands are local and how they can distinguish them from global, what is the value proposition of local and what is the perceived customer value, among others. Currently there is much confusion in the market. Not many consumers are aware that Bata is not a local brand but IFB is. More than anything, the brand must deliver value to the consumer. Indian consumers are not just price conscious but also value conscious. They seek value for money and durability in products. Perhaps the biggest USP of Bata is the sturdiness of its products that promises long-lasting service. The Indian consumer would not mind buying

even a premium Indian product if it has value. The Indian consumer has a wise head on sturdy shoulders and takes weighted informed purchase decision based on a balanced tally of pro and cons.

It is important for local brands to communicate the value proposition and differentiator. By giving consumers a clear picture that

enables them to make informed purchase choices, will certainly encourage more Indian consumers to buy local and support the call for local. Only a satisfied and happy consumer will be vocal about local.

Consumer trends have changed tremendously as consumer confidence in the future has dipped and they are wary of spending. Consumers are no longer spending on large indulgences, or big-ticket items, etc., they're looking at the value that a brand is giving at the price. The trend of premiumization is now gone. That is not to say that consumers are buying cheap. However, they are now looking at value more keenly. The rapid pace of digitalization in terms of how they shop, buy, live, and consume, has changed the consumer. The mobile phone has become the lifeline and consumers, even the rural ones, are accomplishing almost everything online, primarily through the phone. Having discovered the benefit of shopping online, consumers are buying more high-frequency low-value products through e-commerce. Local brands must tap into these changing sentiments. ▶

Source: Secondary research & media reports



CORONAVIRUS

COVID-19

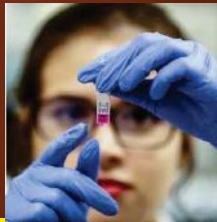
Coronavirus disease (COVID-19) is an infectious disease caused by a newly discovered coronavirus.

Most people infected with the COVID-19 virus will experience mild to moderate respiratory illness and recover without requiring special treatment. Older people, and those with underlying medical problems like cardiovascular disease, diabetes, chronic respiratory disease, and cancer are more likely to develop serious illness.

The best way to prevent and slow down transmission is be well informed about the COVID-19 virus, the disease it causes and how it spreads. Protect yourself and others from infection by washing your hands or using an alcohol based rub frequently and not touching your face.

The COVID-19 virus spreads primarily through droplets of saliva or discharge from the nose when an infected person coughs or sneezes, so it's important that you also practice respiratory etiquette (for example, by coughing into a flexed elbow).

At this time, there are no specific vaccines or treatments for COVID-19. However, there are many ongoing clinical trials evaluating potential treatments.



SYMPTOMS

COMMON SYMPTOMS INCLUDE:

- fever
- tiredness
- dry cough.



OTHER SYMPTOMS INCLUDE:

- shortness of breath
- aches and pains
- sore throat
- and very few people will report diarrhoea, nausea or a runny nose.

People with mild symptoms who are otherwise healthy should self-isolate and contact their medical provider or a COVID-19 information line for advice on testing and referral.

People with fever, cough or difficulty breathing should call their doctor and seek medical attention.

PREVENTION

To prevent infection and to slow transmission of COVID-19, do the following:

- Wash your hands regularly with soap and water, or clean them with alcohol-based hand rub.
- Maintain at least 1 metre distance between you and people coughing or sneezing.
- Avoid touching your face.
- Cover your mouth and nose when coughing or sneezing.
- Stay home if you feel unwell.
- Refrain from smoking and other activities that weaken the lungs.
- Practice physical distancing by avoiding unnecessary travel and staying away from large groups of people.

Helpline Number Toll free: 1075
+91-11-23978046

Email : ncov2019@gov.in • ncov2019@gmail.com

The Changed Consumer

The COVID-19 pandemic has changed consumer behavior and their value perception.



THE PANDEMIC HAS changed consumer behavior as never before. Experts say that people are now looking for more value for every buck spent. The economic uncertainties have added to the health crisis and consumers want smaller units of products but with higher value. The quality consciousness and the demand for value is spread across the entire spectrum be it consumer goods, education or health.

Many experts are seeing a golden opportunity for India in the pandemic as it can become the quality and affordable capital of the world. This is an opportunity to use technology as a game-changer, as we can see already being done in the healthcare and education space and create innovative business models and employment.

According to reports, India can become a \$10-trillion economy in the next 12-15 years if it can deliver 8-10% GDP growth for the 15 years and rise to the level of a mid-income country.

It's not just lowest price anymore for consumers

A recent report by Shopper centric revealed how consumers see value is changing and is now dependent on a varied mix of quantity, quality and price. Retailers who stick to the tried and tested promotions on price-points will eventually lose large chunks of consumers.

According to a new research, while a quarter of the shoppers are looking for the lowest absolute price, 28% want the largest quantity for the money they plan to spend, and for 21%, value is about getting the best quality within their budget.

The pandemic has led to a spurt of price-based campaigns to lure consumers back to the shopping cart, albeit online. Consumers are being offered huge discounts and big price drop by various brands as also buy one get two kind offers, all in a bid by retailers to generate demand and maintain and grow market shares.

The Shoppercentric research was based on the interviews of 1,000 consumers in the age group of 18-64 years. The study revealed that consumers are increasingly choosing vouchers and coupon-based promotions over multi-buy incentives. More than half – 53% – are for redemption offers. Other promotional offers finding favor with consumers include loyalty cards, link offers such as meal deals and added value promotions like free gifts.

The report states that buy-one-get-one-free (BOGOF) deals continue to be the most popular type of promotion at 76%, while money-off single item offers comes second with 66% of the vote.

Eating at home & healthy

A Brand Equity research found the pandemic has changed the eating habits of India consumers. While just 18% urban consumers were found to be consuming health and immunity boosting food, 72% took to it during



the pandemic and 60% of new users indicated they would continue with the health food even after the pandemic.

In India, the consumption of Ayurvedic food products and supplements has seen a sudden spurt in consumption as more and more consumers turn to them for immunity boosting. Chavanprash, a long-time favorite with the elderly and kids has seen rising demand as also Tulsi drops, Giloy products and others. It is expected that the trend may continue as people would look for easy fixes to promote immunity through packaged food, dietary supplements, natural and immunity boosting foods.

Indians who had recently discovered the joys of eating out with multiple international and nation eatery chains opening in the country, are rediscovering the importance of wholesome home cooked food. It could also be that consumers are not confident of spending more on discretionary products with the economy in a binder. The study reported that 66% urban Indians are spending more time on home cooked meals. Not only this, 40% indicated they would carry on with this habit.

Fitness matters

Physical fitness has also become a priority with consumers as they realize that it is a huge factor in keeping infections at bay. With more time on hand as consumers continue staying at home, many have adopted a fitness regime or revived an old one. People are realizing that sedentary lifestyles and the lack of exercise can be a leading cause of lower or compromised immunity system. Online fitness classes like yoga and gym have gained popularity. The study found that while 48% consumers neither practiced fitness earlier nor have adopted it recently, 38% have enrolled for such classes and 23% would like to continue with the new routine.

Health consultations go online

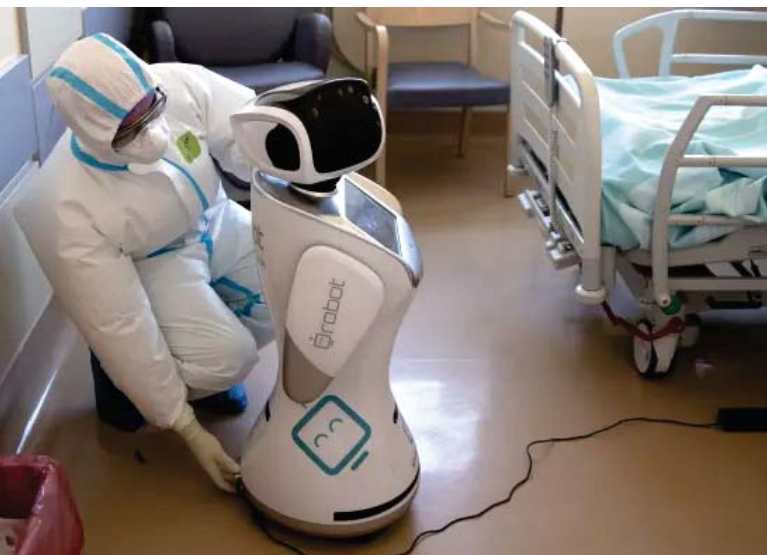
The pandemic turned many hospitals and health centers into Covid-19 facilities fully or partially. As the stretched health system continues to battle the pandemic, the reports of doctor and medical staff contracting the infection added to the fears of people and many put off hospital visits. The government published its Telemedicine Practice Guidelines in March looking at the needs of people locked down at home. This led to a



spike in tele-consultations with 36% new users on boarding the telemedicine market during the pandemic. However, only 19% have indicated that they would like to continue with it. Indicating an urgent need to undertake aggressive promotion of telemedicine in the country, a huge 53% said they are not aware of it and did not try it during the pandemic.

Pandemic changes consumption behavior

Adoption of e-commerce during the lockdown and subsequently as consumers preferred the safety of shopping from home was a big trend as 58% new customers were added to the online grocery market and 38% would continue to shop online. India needs to ramp up its supply chain and logistics to upgrade ecommerce services. Among the new users, females (44%) are more likely to continue buying online as compared to males (35%). Gen Y shows maximum adoption (42%) and western India leads in online shopping. Surprisingly, there is no significant difference in online shopping among Tier



In hospitals robots have been dispatched to assist in coronavirus wards.

1,2 and 3 towns which indeed points to a significant opportunity in this space. Though neighborhood chemist shops had been operating during the pandemic as they were considered essentials, 32% new customers bought medicines online and also indicated they would continue with the practice. Again, the trend showed adoption across tiers but in this category, it was found to be highest in Tier 3 towns at 36% as against 30% adoption in Tier 1 cities. Fearing contact with currency as it would change hands, consumers have also increased their use of digital transactions and digital payment methods.

As job cuts became the norm in the pandemic, more people began turning to online education to upgrade their skills. Many premier universities began extending courses online and this pushed the uptake of online education. The report found 54% new customers took up online learning during the pandemic and of these 36% intend continuing with it.

OTT platforms were the biggest gainers during the pandemic as entertainment avenues were closed and people began to explore options at home. Since TV serials ran their course and new episodes could not be shot, it was the streaming platforms that kept people sane. OTT platforms have garnered 33% new users who will continue watching OTT even after pandemic.



Conclusion

The pandemic has brought about a change in consumer behavior as people learn to adapt to the unprecedented circumstances. The value perceptions of the people have also undergone a sea change and businesses must factor in these developments to cater to the changed customer. ▶

Source: Secondary research & media reports



INDIA'S FASTEST GROWING PATHOLOGY LAB NETWORK

Moving ahead with a vision to provide superior quality diagnostics solutions at affordable prices, Pathkind is present across 10 states through its state-of-the-art 52 Labs and a robust network of 800 + Collection Centres. Equipped with the most advanced technology, every lab conforms to international quality standards to ensure safe & accurate diagnostics experience for everyone

Our wide range of pathology services spanning over 8 major sections:

- Biochemistry & Immunoassay
- Haematology, Immunohaematology
- Coagulation & Flow Cytometry
- Clinical Pathology
- Histopathology & Cytopathology
- Microbiology
- Serology, Automated ELISA and IFA
- Cytogenetics
- Molecular Biology



Over 4 million satisfied customers



Shortest time to ferry samples to the labs to maintain integrity of samples



State-of-the-art Labs using world's best technology



Highly qualified & skilled doctors, scientific officers and phlebotomists



Comprehensive repertoire of tests across all disciplines of Lab medicine



Optimally using technology to track movement of samples through GPS & generating reports



The Co-Creation Of Value A WIN-WIN

Today's customers seek experiential satisfaction through products and services as the trend grows towards customization and personalization. Co-creation of value is a strategy where everybody wins.

IN 2020, WE are looking at an increasing trend of customization where customers seek unique value that is exclusive and not mass produced. How can companies ensure that customers get exactly what they want?

The digital era has ensured that creation of customer value moves out of the precincts of the company and to a co-creation space where both the company and the customer take ownership of the process and the results. That is companies must enlist customers to co-create the value they want.

How can value be co-created? How does it benefit a company?

Co-creation: the new paradigm

To start with co-creation gives a company the competitive advantage. But in order to enjoy this, a company must first understand what co-creation entails. Put simply, co-creation happens when more than one person or party, work together to bring something into existence.

In business terms, co-creation is a strategy and a process whereby customers and company focus on creating customer value together. In this process, customers and employees engage in an interactive relationship as active participants. Co-creation is fast becoming the norm for forward thinking companies. When customers are allowed to participate in the co-creation of value, the collaborative creation of services enhances the consumption experience of customers.

Marketing plays the role of the facilitator in this mutual creation and enjoyment of value. In this new model, businesses are moving away from their traditional model where customers purchased goods or services. Today's customers have the opportunity to engage in dialogue with the supplier during each stage of product design and product delivery where their opinion is actively sought. This leads to value co-creation at multiple points of interaction. Thus, co-creation leads to creation of value jointly by the company and the customer and is not merely the firm trying to push a product or a service at the customer and please the customer.

Some ways in which co-creation works are:

- Customer co-constructing personalized service experience
- Company and customer jointly defining a problem and finding a solution

- Company creates an environment wherein consumers can experientially engage in active dialogue to co-create personalized experiences
- Co-creating a variety of unique customer experiences
- Co-creating innovative experience environments

Co-creation – of value and experiences

Co-creation can take place in two ways – firms can use co-creation as a strategy to create value or experiences.

Co-creation of value: To co-create value, the customer is actively engaged every step of the way. For example,

a disabled or an elderly consumer is actively engaged to design and manufacture aids suited to their individual requirements. Such products and services are on-demand and made-to-order. Homebuyers are often actively involved in co-creating custom-designed homes or apartments. With collaborative effort, companies are able to deliver what customers desire and both stakeholders can reach their goals mutually.

What customers value is influenced to a large extent by their experiences and perceptions. Customers who are highly informed have different perceptions and seek personalized or custom

services or goods that meet their high expectations. They are willing to pay a premium for that satisfaction and appreciate businesses that can accommodate their aspirations.

Many companies therefore seek active participation of customers and stakeholders in the problem-solving process; solicit their ideas, designs, concepts and solutions for products and services. The process of co-creation can hence spread through the entire lifecycle, right from ideation to creation of product or service.

Co-creation is quite common in technology industry where top companies actively involve potential consumers in development of innovative apps, technologies, software, etc. Even in the FMCG space, there are companies like Unilever that have embraced co-creation of value.

The modus operandi adopted by many companies is to communicate specific challenges to the public at large through open innovation platforms and encourage them through competition to submit potential solutions.

Organizations today are openly embracing the idea of marketing as a process that helps brands create value propositions.



TO CO-CREATE VALUE: For example, an elderly consumer is actively engaged to design and manufacture aids suited to their individual requirements. Such products and services are on-demand and made-to-order.



Homebuyers are often actively involved in co-creating custom-designed homes or apartments.

Co-created experiences: Co-creation of experience requires companies to encourage consumers to be actively involved. When experiences are co-created, they become unique and valuable as there is an interactive relationship between the customer and the experience. The consumer not only enjoys the experience as the final product but also the co-creation as an experience in itself.

Co-creation of experiences is becoming quite popular especially in the culture and entertainment sector. For example, plays being co-created with the active involvement of the audience as a co-creator of the theatrical experience. The theatre moves into the lived space of the audience and the audience becomes the prop. The experience thus co-created is immersive and highly satisfying. Involvement of viewers in writing finales or denouement of shows or deciding how the show should end is also a trend.

Value becomes customer-focused

Value creation for customers has transitioned from being a product-centric focus to a consumer-centric approach. Companies realize that today customers make their decision based on their experiences with the firm. Businesses must ditch their product-centered approach if they want to tap consumer potential. They must focus on helping customers co-create personalized experiences that they seek and through these personalized interactions co-create lasting value.

It is important to acknowledge the customers' point of view in designing experiences. Only then can a firm create authentic customer value. Such co-creation requires a deep understanding of consumer trends, desires, and preferences.

Empowering consumers to have a say in creating their experiences is important as the quality of the consumer experience depends on the nature of their involvement. Consumers today do not enjoy playing a passive role. They want to take an active part in co-creating the

experiences they want. Empowering consumers thus enables real value to reside with customers. Experiential marketing is also more about the emotional benefit that consumers get than the utility of the goods or service itself.

Co-created experiences are fundamentally collaborative, with customer and company engaging in it as equal partners. Co-creation subsumes co-design, co-development, co-production, co-consumption among other types within itself.

Opportunities for co-creation

The rapidly evolving digital technology space provides new opportunities and breakthroughs in co-creation of value. Interaction and exchange of information, the two key components of co-creation, are facilitated by technology. The collaborations can happen in the virtual space providing anywhere anytime flexibility to customers. Easy availability of information, knowledge, skills and other resources online which impacts the ability to co-create value, is also enhanced in the online space. Modern retail models too, promote co-creation in the form of self-service and also by allowing customers to customize their order, say at a restaurant.

Social media promotes real-time interactive collaboration between companies and customers and provides an interactive platform for co-creation of value. With more organizations now marking their presence online, it is easier to create communities to engage with customers in digital co-creation.

Benefits of co-creation

For customers, co-creation opens a window to unique experiences, personalized and customized services and empowerment to choose how they wish to engage with the company. There can also be financial benefits to customers, as there can be some cost-saving in designing a custom offering rather than paying a premium for features or services that come packed. The biggest benefit to customers is the emotional satisfaction derived from co-creation.

For businesses, the value co-creation with their customers are many. The gain through high-quality interactions translates into improved efficiency and effectiveness in operations. The bond with the customer becomes stronger and leads to customer loyalty. It allows companies to maximize the lifetime value of desired customer segments. Brands get competitive advantage with improved customer loyalty. Customers share knowledge and skills that help improve products and services and also enrich the company with insights. The time to market becomes shorter and financial performance improves. The work environment becomes more relaxed and teamwork improves.

In short, co-creation of value creates a win-win for both customer and company. ▶

Source: Secondary research & media reports



**Bharat Ratna Mahamana
Pandit Madan Mohan Malaviya**



MAHAMANA DECLARATIONS & ACTION PLAN

ON THE ROLE OF AYUSH AND COVID-19 PANDEMIC 2020

www.patientsafetyaccess.org

9 Key Concepts

1. Patient First
2. Value of AYUSH
3. AMEND The Standard Setting Exercise for AYUSH MEDICINES
4. The Increasing Demand for AYUSH Practitioners
5. Assess the Value of Our Bio-Resources
6. Strong Regulatory Body
7. Institutionalize AYUSH
8. Make AYUSH Popular:
Four Perspectives: i. Preventive interventions; ii. Novel scientific studies; iii. Immunity; iv. Up-scaling and marketing
9. AYUSH Leadership

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PATIENT SAFETY AND ACCESS
INITIATIVE OF INDIA FOUNDATION



Consumer Online Foundation

NABL

Promoting Quality In The Fight Against Pandemic

History of Laboratory Accreditation in India





NABL accreditation is going to be mandatory for all COVID testing laboratories

THE LABORATORY ACCREDITATION program in India was initially setup by Department of Science & Technology, Government of India in 1982 with its name as “National Coordination for testing & Calibration Facilities (NCTCF)” for providing accreditation services to testing & calibration laboratories. NCTCF, with the cooperation of India’s National Metrology Institute (NMI), National Physical Laboratory (NPL), provided accreditation to calibration laboratories. Subsequently in 1993, NCTCF was renamed as “National Accreditation Board for Testing and Calibration Laboratories (NABL)”.

In the year 1996, in reference to the Indian National Scheme for Quality and Conformity Assessment, vide File no.20 (8)/90 – PP&C, Department of Industrial Development, Ministry of Industry, Government of India has approved “The National Accreditation Board for Testing and calibration laboratories to be set up as a society under the Societies Registration Act. It will be fully answerable to the QCI and at the appropriate stage be brought within the fold of the society under which the QCI is set up”.

Thereafter, NABL was registered as a society on 12th August 1998 with the objective to promote, coordinate, guide, implement and maintain an accreditation system for laboratories. NABL operated as an autonomous body under the aegis of the Department of Science and Technology, Government of India.

In the year 2016, in pursuance of cabinet decision (February 1996), NABL along with the support mechanism existing under the Department of Science

and Technology, Ministry of Science and Technology was transferred to the Department of Industrial Policy and Promotion (DIPP), Ministry of Commerce and Industry and subsequently transferred to QCI (Quality Council of India) as one of its Board.

In the year 2017, NABL society regn. no. S/33451 has been merged with QCI society regn. no. S/30832.

NABL Accreditation Services and their recognition

NABL is an accreditation body providing accreditation services to:

- Testing Laboratories as per ISO/ IEC 17025:2017
- Calibration Laboratories as per ISO/ IEC 17025:2017
- Medical Laboratories as per ISO 15189:2012
- Proficiency Testing Providers as per ISO/IEC 17043:2010
- Reference Material Producers as per ISO 17034:2016

NABL is complying to ISO/ IEC 17011: 2017 “Conformity Assessment – Requirements for Accreditation bodies accrediting conformity assessment bodies”.

NABL is a full member and a signatory (since 2000) to International Laboratory Accreditation Cooperation (ILAC) as well as Asia Pacific Accreditation Cooperation (APAC) Mutual Recognition Arrangements (MRA), which is based on peer evaluation. Such international arrangements facilitate acceptance of test/ calibration results between countries which MRA partners represent.

NABL accreditation is increasingly being used by Regulators and Government to ascertain the quality of products.

Most of the regulators/Govt. departments have identified accreditation as the pre-requisite criteria for their recognition (APEDA, FSSAI, BEE, BIS, CPCB, MNRE, GeM, Dept. of Consumer Affairs/Weights & Measures, Ministry of Health and Family Welfare /CDSO, Ministry of Food Processing Industries (M/o FPI), Ministry of Electronics and Information Technology (MeitY), Ministry of Environment, Forest and Climate Change (MoEF&CC)).

NABL accreditation is widely recognized and laboratories accredited by NABL can objectively state conformance of product or service to specified requirements

NABL Accreditation Process – Salient Features

Accreditation is defined in international standard as follows:

“Accreditation is a third-party attestation related to a conformity assessment body conveying formal demonstration of its competence, impartiality and consistent operation in performing specific conformity assessment activities”.¹

In short, a laboratory accredited by NABL has successfully demonstrated competence to carry out testing, impartiality in operations as committed by the management of the lab, and consistence in operation of their quality output.

Once a laboratory applies to NABL, after a thorough review of the laboratory's management documents, an on-site assessment of the laboratory is conducted wherein the technical competence, consistent operation of the defined quality policy, procedures and different aspects involved which could affect the test results are thoroughly assessed.

As an accreditation body, NABL itself needs to ensure that its operations are being conducted impartially. This is achieved by NABL through the use of Accreditation committees.

Clear distinction exists in every process of accreditation wherein, the assessors visiting the laboratory, declare their non-affiliation with the laboratory and then assess the laboratory, the report generated from this assessment is further reviewed by accreditation committee members who are a team of experienced experts and are not part of the assessment of the CAB ensuring that the report generated is reviewed by a different set of experts and then the decision on accreditation of the laboratory is taken.

Other committees such as complaints and appeals have separate members who further are not involved in any part of the accreditation process thereby ensuring complete impartial operation in accreditation system.

Once all the requirements of the international standard and NABL specific requirements are met accreditation is granted to the laboratory.

The continued compliance of the laboratory is ensured through its participation in proficiency testing and annual surveillance mechanism.

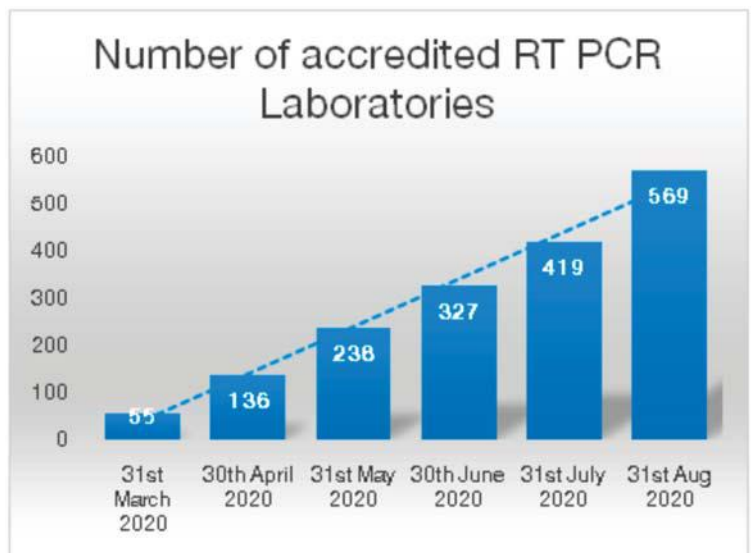
NABL Response to the Pandemic

WHO declared COVID-19 as a global health emergency and subsequently as a pandemic. As our nation embraced for the oncoming pandemic through a series of lock downs. A dire necessity for a medical testing infrastructure was observed, which are required to test, trace and isolate the virus infection.

NABL adhering to the regulations was tasked with identifying, accrediting and increasing the testing capacity against the SARS-COV-2 virus.

Around 55 NABL accredited laboratories which are competent in testing RNA Viruses through RT PCR RNA (H1N1 virus) technique were identified by NABL. This information was shared with ICMR and Ministry of Health and Family Welfare (M/o HFW).

As the SARS-COV-2 virus was novel in nature, there were no controls existing in the country.



The National Institute of Virology, Pune (NIV-Pune) also an NABL accredited laboratory was designated for identifying the positive and negative controls for the SARS-COV-2 virus and further disseminating them to other competent laboratories.²

With the challenges posed by the lockdown during the initial period, NABL resolved to optimize its process to ensure capable laboratories coming forward to support the nation by testing for identification of SARS-COV-2 virus are competent and the results obtained from these laboratories are trust worthy.

In a remarkable transformation, NABL achieved accreditation of more than 550³ medical laboratories competent to carry out the testing of RT PCR RNA viruses.

The RT PCR technique is considered the gold standard in determination of the virus with very minute chances of false positives / negatives in the results.

In order to achieve the laboratory numbers required to exponentially increase the tests performed, the regular accreditation process and the usual time taken to accredited laboratories posed a limitation.

But, the quality of accreditation on the other hand cannot be compromised which is even more critical to ensure the best possible technical infrastructure to fight the pandemic.

Through, innovation and optimization of the accreditation process, the time to grant accreditation to a laboratory was reduced to an average of 2 to 14 days. Some laboratories were accredited as quickly as 2 days from application for accreditation.

This was only possible due to the commitment to support the nation in spite of the many hurdles which were faced.

The Medical officers' team at NABL, Assessors, and Accreditation committee members were the core support which made this miracle happen.

Along with our Medical team and assessors, many other staff worked in greasing the machine to ensure the momentum keeps on going by supporting them in portal implementation, conducting accreditation committees, accrediting testing laboratories for supporting products and through moral support.

We also thank our medical laboratories who have invested crores of rupees in developing the facilities needed for testing and ensuring the quality of service through accreditation.

The accreditation process was optimized for the single RNA virus testing parameter and quick turnaround time were established. This resulted in easier application filling for the laboratories. The process in the portal was optimized and it was ensured all the necessary steps which are to be followed are implemented and automation at the necessary tasks was done to reduce the overall time taken at every step.

Another important aspect alongside medical laboratories is the need for laboratories testing critical



products and equipment such as PPE, Sanitizers, Masks and ventilators, medical devices.

It is heartening to note the initiatives of more than 130 accredited testing laboratories which have enhanced their facility to include testing of products such as PPE, Masks, Sanitizers, ventilators, etc. Around 65 accredited calibration laboratories are providing calibration services to medical equipment to ensure accurate results. The details of these laboratories are mentioned on our website. These laboratories are ensuring the products used in our fight against the pandemic are up to the specific requirements.

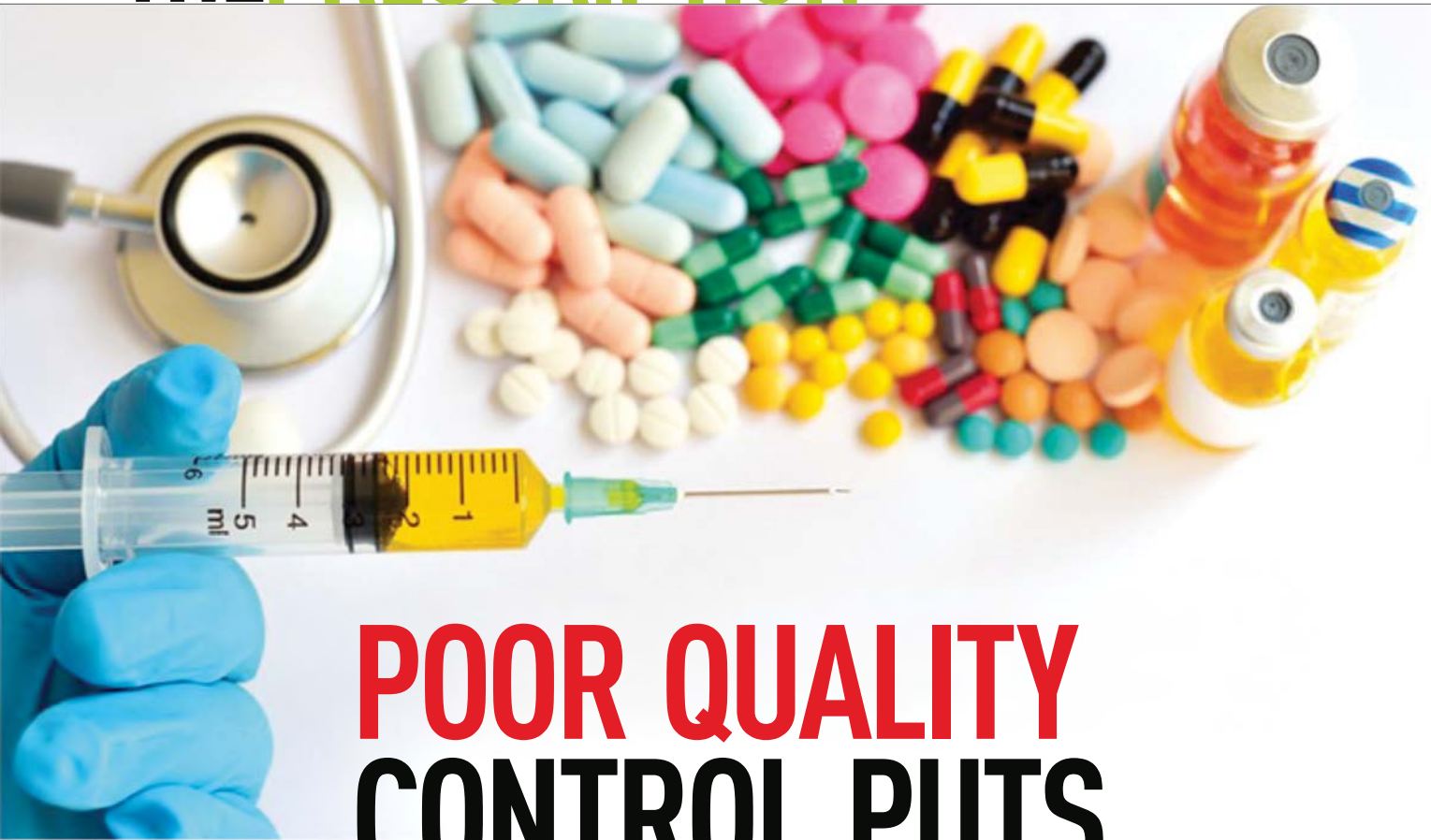
NABL could support the nation in this time of the pandemic and ensure the quality services are reaching the medical professionals leading the fight against the pandemic and protecting the health and safety of the common man.

The details of all these accredited laboratories is available on NABL website (www.nabl-india.org). ▶

¹ ISO/IEC 17000 Conformity assessment – Vocabulary and general principles

² Sarkale et al: SARS-COV-2 from clinical samples

³ <https://nabl-india.org/wp-content/uploads/2020/08/RT-PCR-RNA.pdf>



POOR QUALITY CONTROL PUTS MILLIONS OF PATIENTS AT RISK

Popular drugs used for treatment of diabetes and hypertension found to be potentially carcinogenic leads top Indian manufacturers to recall their drugs from American and European markets. Experts fear they could have been rerouted to the domestic market in the absence of stringent regulatory control. A wake-up call for the Government of India to pull up its drugs quality assurance system before the situation spirals out of control.



RECENTLY, US FOOD and Drug Administration that inspected Mylan's plant in Pashamylaram, Telangana, flagged the lack of adequate precautions to ensure solvents didn't contain impurities and warned the Pharma giant. Mylan NV was found to have failed to ensure key drug ingredients made at one of its plants in India were not contaminated. The US regulator also advised that the company hire a consultant to provide assistance to the generic drug-maker in improving its manufacturing practices.

Failure to adequately test the raw materials was also flagged by the authority. This is a serious matter as solvents help in combining ingredients in the drug-making process and despite finding signs of impurities in its solvents, the company had failed to take any action.

Starting two year ago, blood pressure pills had to be recalled as they were found to contain cancer causing chemicals. The recalled drugs had also included those being

manufactured under Mylan brand. This year, testing revealed NDMA in Metformin, which is common diabetes drug taken by over 15.8 million people worldwide.

The contamination of crucial drugs has been traced to drug-makers failing to investigate and take action on finding signs of impurities during testing.

Quality in drugs cannot be compromised as it can be fatal. Mylan on its part said that it has been working with FDA to investigate the matter, has put in place controls and is taking corrective actions at the facility.

Impurity in drugs: patients at risk

Hypertension and diabetes are the two fast-growing NCDs collectively responsible for almost 70% of all deaths worldwide, says WHO. Since prevention and management are important in controlling lifestyle diseases, a vast and growing global population is dependent on

medicines. The potentially carcinogenic impurity detected in drugs used to treat hypertension and diabetes is hence alarming and has made patients all over the world apprehensive.

The situation is quite serious as since July 2018, around 53 drug recall notices have been issued by USFDA. In 2020, 16 recall notices have been issued over the detection of this potential carcinogenic contamination in commonly used drugs.

NDMA, a potentially carcinogenic impurity contamination was first detected by the USFDA as well as European Medicines Agency (EMA) in July 2018 in an anti-hypertensive drug. Subsequently, the impurities have been traced in different anti-hypertensive medicines, gastric ulcer prevention drugs and in anti-diabetic drug metformin. With thousands of batches of such drugs revealing the presence of small amounts of cancer-causing chemicals in them, the matter needs serious attention from drug regulators.

TYPES OF IMPURITIES



Organic Impurities

- Starting Materials
- By-Products
- Intermediates
- Degradation Products
- Reagents, Ligands, & Catalysts



Inorganic Impurities

- Reagents, Ligands, & Catalysts
- Heavy metals or other residual metals
- Inorganic Salts
- Filter aids, Charcoal & Other Materials



Residual Solvents

- Class 1: Solvents to be avoided
- Class 2: Solvents to be limited
- Class 3: Solvents with low toxic potential





NDMA is an N-Nitrosamine, a class of chemical compounds with an N-N=O structure. These compounds are found in several products including tobacco, detergents, and solvents, among many others. They may also be formed in foods when nitrites react with a secondary or tertiary amine, which often occurs in cured meats containing sodium nitrite as a preservative.

Why NDMA contamination is serious

NDMA has been classified as “probable carcinogen” by the International Agency for Research on Cancer. In animal studies, it formed tumor predominantly in the gastrointestinal tract and liver but also in lungs and kidneys. NDMA also caused liver damage and fibrosis in animal models. This has considerably shaken the faith and confidence of patients consuming these drugs and they are afraid for their safety. Experts say that the trace amounts of carcinogens in these drugs can increase the risk of cancer in people exposed to them at above acceptable levels over long periods of time. Since the medicines are taken lifelong by patients there is definitely

all the reason to be apprehensive. Also, the average level of NDMA detected in these drugs was 60 parts per million. At this level, there could be one extra case of cancer for every 5000 patients taking the drugs at their highest dose every day for 7 years, according to reports.

Some of the manufacturers who recalled their product, following the drug regulators notice. These include Apotex Corporation, Sandoz, Sanofi, Aurobindo and Dr Reddy Labs. They had recalled products containing ranitidine which was found to have high levels of the contaminant. The discovery of NDMA in Metformin, led several leading Indian drug manufacturers like Lupin, Marksans Pharma, Aurobindo Pharma and Alembic Pharmaceuticals to recall their drugs from the US markets.

A report by USFDA states around 9.71 lakh bottles of diabetes drug were recalled by Lupin and Granules from the US market. Marksans Pharma recalled 11,279 bottles of metformin tablets. GlaxoSmithKline Pharmaceuticals also announced its decision to stop the manufacture and supply of ranitidine tablets manufactured in India. Reports said it had been contacted by regulatory authorities after the detection of NDMA in its products. Dr Reddy's Laboratories Ltd also recalled all its ranitidine medications sold in US due to contamination with NDMA above permissible levels as established by the USFDA. All these voluntary recalls have been classified as class II recalls which means that the use of, or exposure to, a medicinal product may cause temporary or



Hypertension and diabetes are the two fast-growing NCDs collectively responsible for almost 70% of all deaths worldwide, says WHO.

medically reversible adverse health consequences.

Two other nitrosamines namely NMBA and NDEA have also been detected in at least six more drugs. These drugs are also consumed by tens of millions of people each year. While NDMA and NDEA are classified as “probable human carcinogens”, NMBA is a “possible human carcinogen,” according to the USFDA. Origin of NDMA contaminated bulk drugs has been traced back to a Chinese drug manufacturing firm by the European Medicines Agency (EMA). The European regulators trace the problem back to 2012 which could be due to changes in manufacturing processes at this unit.

It is not just drugs, NDMA is also present in many processed foods and alcoholic beverages as well. Traces have been found in smoked fish, broiled meat, bacon, cereals, dairy products, some fruits and vegetables, etc. The contamination has been attributed to water used in plants and by animals, soil contamination, food animals eat, or even processing before sale. In medicines, the two

sources of NDMA contamination are the use of material like solvents or catalysts contaminated with NDMA in the manufacturing process; and when NDMA is created from an intermediate or from the active ingredient itself.

What should patients do?

Suddenly stopping prescribed medication can be counterproductive. Medical professionals advise that the patients continue taking recalled metformin until their doctor prescribes an alternative or a different line of treatment.

Way forward

Vigorous testing of all the bulk drugs as well as finished drug formulations for these impurities is the only way forward as of now. The repercussions of continued consumption of contaminated drugs could be devastating for patients. One must also take into account the fact that many patients may already have been on these medicines for past many years. It is urgent that the Government of India takes prompt

actions and issues guidelines on testing of all medicines for NDMA contamination. This must be done not just for drugs already in the market but also those in the pipeline. The government must also make all information regarding such drug recalls within Indian markets public. Experts fear that the drugs recalled from the US and European markets by Indian entities may have found its way into the domestic markets putting at risk thousands of patients. There is an urgent need to establish stringent quality assurance and drug regulatory system that could effectively rein in unscrupulous elements who do not hesitate to play with the health and lives of consumers.

This is a warning bell and the government must wake up to its call and take all measures to nip the problem in the bud before it spirals out of control. Steps must also be taken to plug the sources of these impurities. This requires cleaning the system down the chain to the source and also in the manufacturing process of medicines. ▶

Source: Secondary research and media reports

State Of The Art Cold Chain Logistics Needed

Quality cold chain logistics needs to be developed urgently to ensure Covid-19 vaccine distribution is not impacted.

QUALITY IS NOT just about the product, but in many industries a lot depends on the efficacy of the logistics. The logistics industry is emerging as a crucial arm of the Indian economy, especially as the crisis has made e-commerce a major source of consumers buying products. When we look at the pharmaceutical industry, the cold chain has steadily been emerging as an indispensable part of the supply chain with the coming of biologics that require strict temperature-controlled distribution. With COVID-19 vaccines in the pipeline the industry now needs to bolster the cold chain urgently.

Despite India gaining rapid prominence in the pharmaceutical sector – it is the third-largest producer of pharmaceutical products in terms of volume – it still has miles to go in developing state-of-the-art temperature-controlled storage systems and logistics.

Drugs need to be preserved at strictly prescribed temperature. Any failure on this front cannot only result in erosion of drug efficacy, but also destruction and sheer wastage. For the end consumer, it means both loss in terms of health and finance as they end up buying medicines that are not what has been projected. The loss in global pharmaceutical industry due to logistics failure amounts to worth more than \$15 billion due. The reason for the product loss being temperature fluctuations during transit.

As per recent reports, the Indian pharmaceutical industry is slated to grow to \$100 billion by 2025. As of 2019, it is estimated at \$37 billion. Looking at the projected growth, and more crucially, the ongoing trials of vaccines, the logistics and cold chain part of the industry must grow commensurately and rapidly manage the industry's growing requirement.

Rising demand for temperature-controlled pharma logistics

The regulatory framework for temperature-controlled logistics is a work in progress and as the laws improve and lay down stringent conditions, the cold chain industry is set to get an added impetus. Secondly, as healthcare infrastructure improves in the country, with the government working on developing hospitals and health

centers at the district and rural level, the demand for pharmaceutical logistics is set to rise. The requirement of a temperature controlled cold chain for distribution of COVID-19 vaccine is also expected to boost the industry.

Challenges galore

Currently, there is an acute shortage of temperature-controlled warehousing and surface transportation. There is a lack of commitment to quality by pharmaceutical players, as they are more concerned about costs than the need for temperature integrity of products. The lack of long-term commitment by pharmaceutical players to the logistics industry, means not many are willing to invest in improving the cold chain. The recent demand for temperature-controlled air capacity and reefer containers have hence pushed the prices up. There is an urgent need to create an environment conducive for a level playing field in the sector in order to boost its development.

The current pharmaceutical cold chain market in India is highly fragmented and price sensitive. There are many small operators who provide temperature-controlled warehousing as well as transportation. The cold chain is being used not just for pharmaceutical products but perishables like fruits and vegetables as well. For pharmaceuticals, it is critical to maintain the temperature integrity through the entire travel route traversing interior markets. This is one of the major challenges facing logistic players.

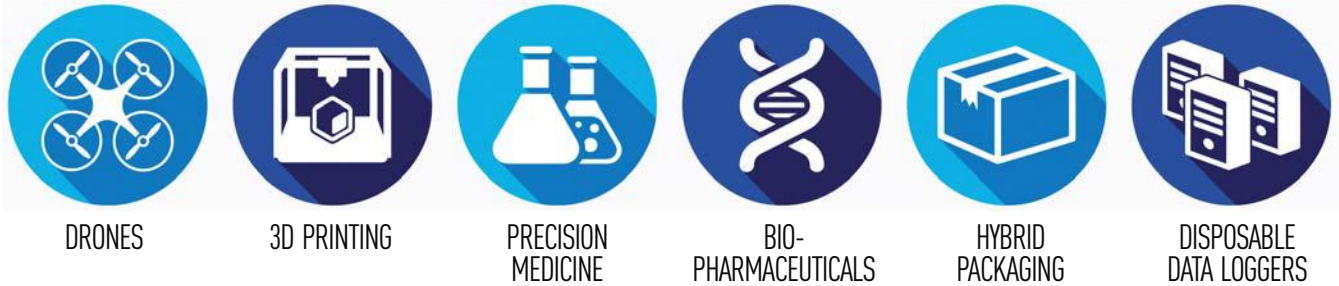
Another challenge is the unwillingness of pharmaceutical logistics companies to forge partnership with cold chain and pharmaceutical companies. The industry currently is cost conscious and prefers transaction mode. Since cold chain sector is underdeveloped, for pharmaceutical companies it is difficult to estimate the total cost of transportation and they end up paying higher than estimated prices for the logistics.

The entire process is further complicated by the cumbersome paperwork process in the pharmaceuticals logistics industry. From the time a consignment leaves a manufacturing unit. It has to undergo a series of

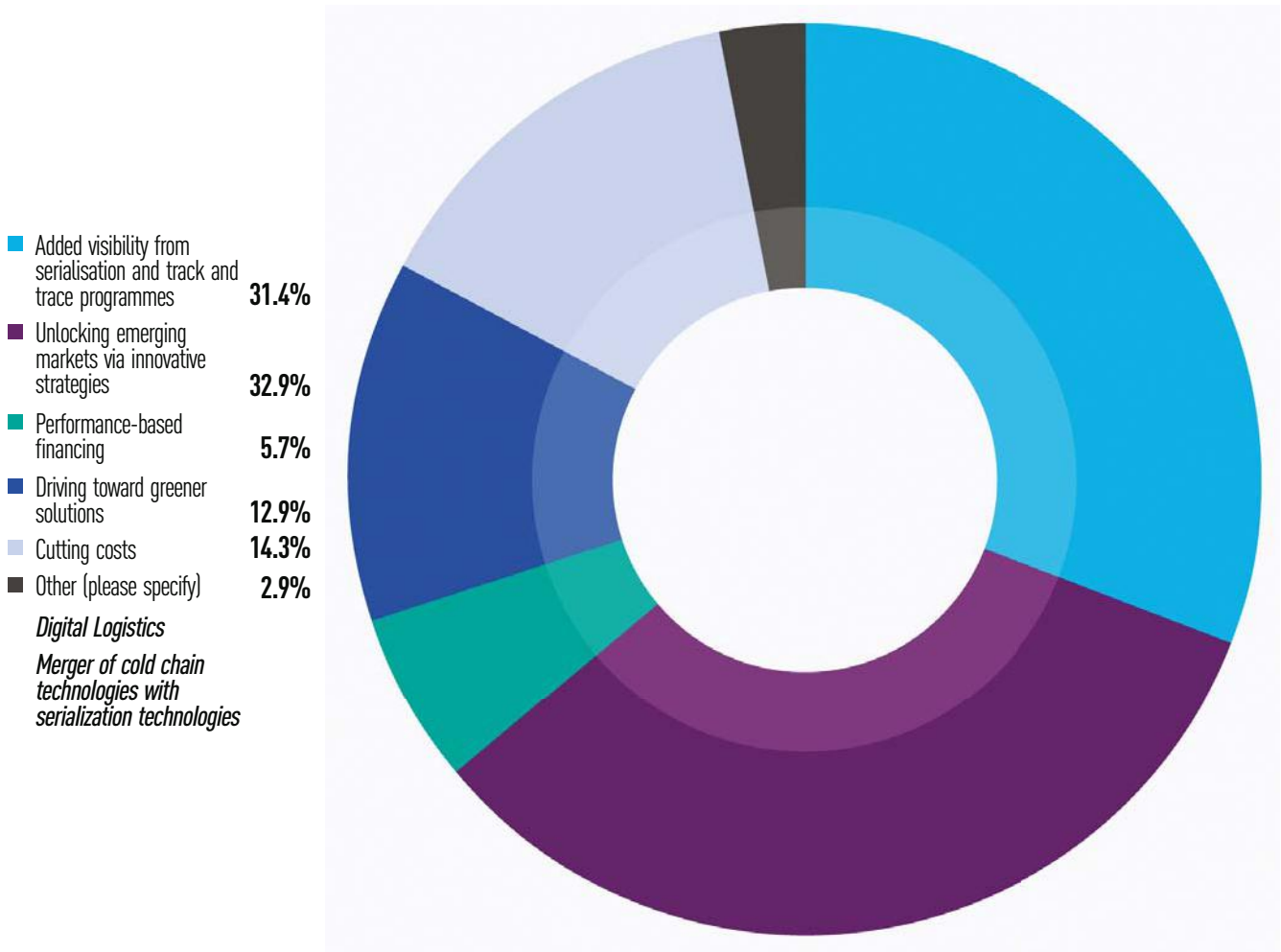


It is a travesty that a country that sees a high rate of malnutrition also sees a high rate of produce loss because of improper storage and transport. India has lagged in temperature controlled logistics. Temperature controlled logistics is imperative for many products – fresh produce, meat and fish, pharmaceuticals, processed food, among others. As demand for perishable products grows, efficient and effective cold chain management requires strong partnerships and quick reactions.

WHAT DO YOU PREDICT WILL BE THE MOST DISRUPTIVE TECHNOLOGY FOR THE TEMPERATURE CONTROLLED SUPPLY CHAIN OVER THE NEXT DECADE?



WHAT WILL BE A KEY SUPPLY CHAIN LOGISTICS TREND TO CAPITALISE ON OVER THE NEXT FEW YEARS?





As per recent reports, the Indian pharmaceutical industry is slated to grow to \$100 billion by 2025. As of 2019, it is estimated at \$37 billion. Looking at the projected growth, and more crucially, the ongoing trials of vaccines, the logistics and cold chain part of the industry must grow commensurately and rapidly manage the industry's growing requirement.

inspections and document verification process from the level of local authorities up to the transport authorities. For imported drugs too, the process is protracted and takes up to a couple of days. In an industry where the efficacy of vaccines and drugs can be compromised by minutes, this delay can be costly. Imported shipments face additional risks as they are opened for checking at airports and remain open for a couple of hours exposed to external temperature.

The power supply situation that necessitates generators leads to higher cost for operators. Transportation vehicles also need to be designed with the right capacity and storage. Unless the sector becomes competitive with the entry of more professional companies into the cold chain area of logistics, we may not soon see capacity development in this industry. While most of the regulations are based on the international movement, the disparity in local levels as compared to global standards, complicates the issue. There is a need for specialization in pharmaceutical logistics and the ability to provide temperature integrity of the cold chain must be developed.

What needs to be done

For the pharmaceutical companies, it is crucial to be able to repose faith in their supply chain partners. They need assurance that the logistics partner can ably reduce the cost of transportation while adhering to the stringent requirements of temperature, documentation, customs clearance in a transparent manner. The Pharma-logistics sector must hence provide the confidence to the

pharmaceutical companies with approved vendors and supply chain service providers who are capable of maintaining the highest standards in their facilities and operations, have a qualified and competent staff and deliver seamless temperature monitored transportation across the supply chain.

Pharma companies have certain expectations from their cold chain logistics partner. These include reduced cost of the supply chain, less paperwork, quicker processing at the customs, and professional cold chain and distribution practices that can guarantee that the product reaches the patients at the prescribed storage conditions. This is crucial to ensure the real benefit of the drug to the patients. There must be end-to-end visibility of shipments and real-time temperature tracking of consignments as well.

Experts have already been speaking for the need to develop a highly secure and competent vaccine logistics. In fact, the International Air Transport Association (IATA) has sounded the bell asking governments to start planning the logistics along with industry stakeholders. Before the vaccine is ready, we must have in place a cold chain logistics system with security, documentation and various other processes in place to ensure there are no delays in the vaccines reaching the end consumer.

Since the world is dealing with the biggest humanitarian crisis in the recent history, there is an urgent need to educate all stakeholders, sensitize and train them to ensure that the integrity and protocols of the distribution are not compromised as it could be fatal for the consumers. ▶

Source: Secondary research & media reports



Cautious Consumers Spend Less

Indian consumers spend cautiously during pandemic, but the festival season may motivate them to splurge

A RECENT GLOBAL survey by Standard Chartered Bank indicated that for most of the 90 percent respondents from India the pandemic has changed their behavior making them more careful with their expenditure now. Globally, the figure is 75 percent.

Apparently, the pandemic induced global recession and unemployment have made people more cautious with their money. A higher percentage of Indian consumers, 76 percent, as compared to 62 percent globally, said they are more likely to track spending. Over 80 percent of the respondents are either using or interested in using budgeting tools or tools that block card-spend over specified limits, the survey found. More Indian consumers are also willing to shop more online with 78 percent saying they will, compared to global average of around two-thirds.

Charulata Dutta, 55 is a Delhi resident and turned to online grocery shopping during the pandemic. Stating her reasons, she said, "My husband is 60 and a diabetic. I could not risk venturing out to the local mandi for vegetables or other essentials. I order most of the stuff online including vegetables. I discovered that they are not only fresh but also offer me a discount. They are clean

and neatly packed making it easier for me to store in the fridge.

The study also points to the global consumer trend of spending more on basics such as groceries and healthcare and digital devices than before the pandemic. This trend is predicted to continue in the future.

Goirik Murthi, 45, is a Noida resident whose office is in Defense Colony in Delhi. Talking about the economic uncertainty he says, "The middle classes specially need to hold on to every penny as we don't know what the future will unfold. There have been mass layoffs in most industries and spending on anything except the bare essentials is foolhardy."

The pandemic put on hold many people's travel plans and 64 percent of Indians in the survey said they have spent less on travel/holidays than they did before the pandemic. The global figure is 64 percent. Also, 30 percent Indian consumers have spent less on experiences and 56 percent have spent less on clothes. The corresponding global figures are 41 percent and 55 percent respectively.

Geeta Varma, a young professional is an avid traveler. She would save up for an annual trip abroad exploring

MOST PLAN TO HAVE 2ND INCOME

KEY FINDINGS GLOBALLY



78% | Feel they have e-skills needed to thrive



64% | Willing to retrain or acquire new skills



46% Increased spending in July compared to June

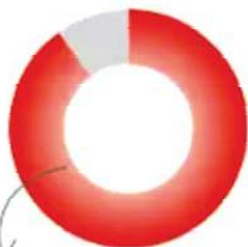


65% | Would set up a second income stream



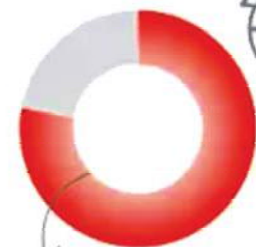
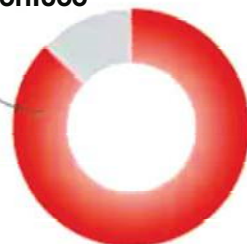
62% | Now more likely to track spending

FINDINGS IN INDIA



90% | More careful about spending due to Covid

87% | Agree country will go cashless



78% | More positive about shopping online



new destinations, while also taking short weekend breaks to nearby destinations domestically. "All my travel plans are on hold indefinitely and not just because of the virus. I need to save for the rainy day instead of splurging as I have done for the past few years."

The trend, as per the survey, is likely to continue in India with 41 percent saying they would be spending less on travel/holidays, 19 percent on experiences and 28 percent on clothes in the future.

There is also a rising conscientiousness among Indians as they are more likely to shop conscientiously than the average global consumers.

Over 72 percent of Indian consumers indicated that they are now more likely to shop locally; 69 percent will buy

sustainably sourced products; and 73 percent will prefer small businesses. It would seem the government's call to be 'vocal for local' may actually work.

Rekha Kumar, a public relations manager in an MNC in the national capital has always preferred buying from multinational brands. However, she has now turned to homegrown Ayurvedic cosmetics and is discovering the joy and comfort of handloom. "After graduating from a B-school I took to wearing western formals and cosmetics from international top brands. But while working from home these past few months, I have discovered how uncomfortable they can be in the hot summers. I am now more into comfortable cottons from local brands and have also discovered that Ayurvedic cosmetics actually help my skin."



In India, 64% of people say they have spent less on travel/holidays than they did before the pandemic, while 30% have spent less on experiences and 56% have spent less on clothes.

However, despite the caution, there seems to be an uptick in festive consumer spending. A study by Integral Ad Science (IAS) that studied the online shopping behavior found changing consumer patterns across. The trend is also discernible in Indian consumers, though this study did not cover India.

Majority of European consumers (72%) will maintain or increase their shopping budget in the festive season. In India, the festive season has kicked off and consumers are already planning to increase their spends.

Mohan and Niti Sharma are planning to buy new clothes and also avail the festive season discount to purchase a new fridge and television. Mohan says, "We have to learn to live with the pandemic till a

vaccine becomes available. We cannot just put our lives on hold and must find our happiness in the current situation. Life must go on. Festivals must be celebrated with all caution but in the same spirit as we have always done."

Retailers are already spending on various promotions to rev up the seasonal shopping. Promotions and discounts are targeting consumers as businesses attempt to capture consumer spend. They are adopting novel ways such as sending WhatsApp messages to consumers promising safe home delivery and huge discounts.

Source: Secondary research & media reports

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NABH AYUSH ENTRY LEVEL CERTIFICATION PROGRAM

TAKING QUALITY TO OUR ROOTS



NABH is a constituent board of Quality Council of India (QCI). It is playing a pivotal role at the National level in propagation, adoption and adherence to healthcare quality standards in AYUSH healthcare delivery systems.

With an objective to bring more light to AYUSH related treatments, the Government of India in 2014, formed the Ministry of AYUSH and consequently brought in the National Accreditation Board for Hospitals & Healthcare Providers (NABH) to start implementing quality healthcare standards for hospitals providing AYUSH treatments as well.

In the recent years, there has been a paradigm shift from allopathy system to traditional healthcare. To support this trend, health insurers have started offering AYUSH treatment covers as part of their health insurance policies. NABH Ayush Entry Level Certification Standards provide an objective system of empanelment by insurance and other third parties. These standards also address the need for quality control and quality monitoring in AYUSH healthcare as required by the Pradhan Mantri Jan Arogya Yojana (PM-JAY) under the Ayushman Bharat Scheme.

NABH AYUSH Entry Level Certification standards are easily downloadable from NABH website.



www.nabh.co



nabh@nabh.co



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