‘LMIS for Logistics Sector - Logistics Skill Plan for 2022’

By

Logistics Sector Skill Council

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Preface

Skill development and entrepreneurship efforts across the country have been highly fragmented so far. As opposed to developed countries, where the percentage of skilled workforce is between 60% and 90% of the total workforce, India records an abysmal 4.69% of workforce with formal vocational skills. There is a need for speedy reorganization of the ecosystem of skill development and entrepreneurship promotion in the country to suit the needs of the industry and enable decent quality of life to its population. There exist several challenges in the skilling and entrepreneurship landscape in the country especially in logistics sector; a few of the many are enumerated below:

- Logistics viewed from narrow prism of single sector than integrated sub-sectoral approach
- Public perception that views skilling as the last option
- Mismatch between demand and supply at the sectoral and spatial levels
- Limited mobility between skill and higher education programs and vocational education
- Very low coverage, poorly designed apprenticeship programs devoid of industry linkages
- Narrow and often obsolete skill curricula
- Inadequate impetus to innovation
- Inadequate integration of logistics technology changes in curriculum

Given this background, the LSC has initiated various to programs to develop skilled human resources.

The objective of this booklet is to provide background to sub-sectoral employment based on available information, sensitise key stakeholders on the need and benefit of having a robust Labour Market Information System (LMIS) and create roadmap for logistics skill plan

About Logistics Sector

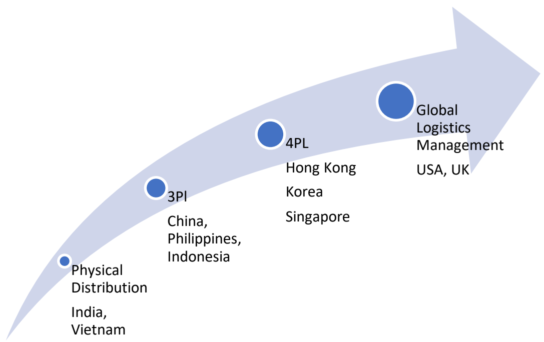
Logistics is defined as a business planning framework for the management of material, service, information and capital flows. It includes the increasingly complex information, communication and control systems required in today's business environment. A typical logistics framework consists of physical supply, internal operations and physical distribution of goods and services.

Size and Contribution to GDP:

- The global annual logistics spend is valued at about USD 8.2 trillion.
- The Indian logistics sector was valued at USD 293 billion in 2016 and is growing at the rate of 8-10% annually
- Indian logistics sector contributed to 13% of GDP in 2016; this is much higher than that in the US (9%), Europe (10%) and Japan (11%) but lower than that in countries such as China (18%) and Thailand (16%)

Structure

- The Indian logistics sector is moving from ‘physical distribution’ to ‘integrated logistics management’
- The sector is primarily dominated by small and unorganised players (85-90%) and the organised sector contributes to only 10% of Indian market
- Indian logistics is facing a gradual shift towards 3PL and 4PL operations, this is driven by,
  - Global customers demand for visibility and control
  - Increased need for information flow
  - Emergence and deployment of technology
  - Shift from unorganised to organised sector
  - Governmental policies and regulations



Scope of Logistics Sector

Warehousing
(Storage & Packaging)

Land Transportation

Courier & Express Services

Terminals, ICDs and CFS Operations

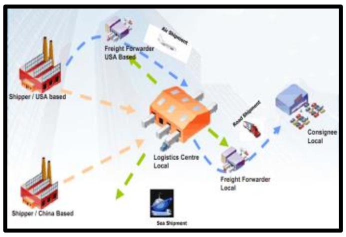
Air Cargo Operations

EXIM logistics - Freight Forwarding & Customs Clearance

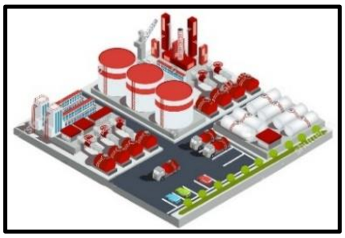
Cold Chain Logistics Solutions

E –commerce

Inland Waterways & Marine Services



Supply Chain



Liquid Logistics

Rail Logistics

Background of LSC

Logistics Sector Skill Council, (LSC) a society registered under the Societies Registration act, 1860 is a not for profit organization set up by Ministry of Skill Development and Entrepreneurship (MSDE) though National Skill Development Corporation of India (NSDC) and promoted by Confederation of Indian Industries Institute of Logistics (CII-IL) a Centre of Excellence in Logistics, with the aim to develop skill trained as well as up-skill the workforce in India.

Vision :

Create a sustainable skill ecosystem aligned to the industry needs for logistics by developing best occupational standards and
deliver quality training to increase the dignity of labour.

Mission:

- Develop a skilled talent pool of work-force in the logistics industry under various sub-sectors through eminent training partners
- Monitor the training delivery with a view to ensure candidates are trained to meet the Industry requirements and continuously fine tune the National Occupation Standards, curriculum and content so that Industry prefers LSC certified candidates
- Benchmark the quality of the training related to increase in productivity and measured by reduction in rework/incidents and accidents and establish the improved logistic efficiency in terms of reduction in logistic costs
- Bring in the best practices from across the World to our Indian logistics industry for the betterment of professional standards.

LSC Training Ecosystem:

- LSC currently has 813 training centres,
- 976 trainers and
- 81,928 enrolled candidates for training.

Sub sectoral Present Estimated Employment in Logistics Sector

Present Estimated Employment in Logistics Sector

Sub Sectors	Employment in Mn.	%
Land Transportation	4.84	38.03%
Warehousing (Storage and Packaging)	3.84	30.15%
Supply Chain	2.12	16.63%
Courier and Express	1.37	10.78%
Cold Chain Logistics Solutions	0.16	1.23%
Exim Logistics-Freight Forwarding and Customs clearance	0.12	0.94%
Inland Waterways and Marine Services	0.10	0.79%
Port Terminals, ICD and CFS	0.08	0.65%
Air Cargo Operations	0.06	0.49%
E-Commerce	0.02	0.16%
Liquid Logistics	0.02	0.12%
Rail Logistics	0.01	0.04%
Total	**12.73**	

The estimated current employment of logistics sector is around 12.73 Million.

This covers all the 12 subsectors covered by LSC

- 95% of this employment is contributed by land transportation

Warehousing, Supply chain and Courier and Express

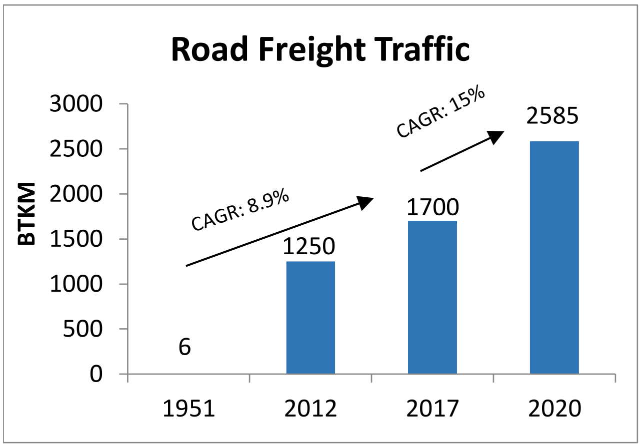
Estimated Present Employment as per Job Role Distribution

Sub Sectors	Associate (which includes blue collar and entry level) (in Mn)	Executive (in Mn)	Support Function (in Mn)	Manager & Above (in Mn)	Total (in Mn)
Land Transportation	1.36	3.20	0.15	0.15	4.84
Warehousing (Storage and Packaging)	2.42	0.92	0.35	0.15	3.84
Supply Chain	1.17	0.42	0.21	0.32	2.12
Courier and Express	0.89	0.27	0.14	0.07	1.37
Cold Chain Logistics Solutions	0.05	0.06	0.02	0.02	0.16
Exim Logistics-Freight Forwarding and Customs clearance	0.03	0.07	0.01	0.01	0.12
Inland Waterways and Marine Services	0.04	0.05	0.01	0.01	0.10
Port Terminals, ICD and CFS	0.03	0.04	0.00	0.00	0.08
Air Cargo Operations	0.02	0.03	0.01	0.00	0.06
E-Commerce	0.00	0.02	0.00	0.00	0.02
Liquid Logistics	0.01	0.01	0.00	0.00	0.02
Rail Logistics	0.00	0.00	0.00	0.00	0.01
Total	**6.01**	**5.09**	**0.89**	**0.74**	**12.73**
% Distribution	**47%**	**40%**	**7%**	**6%**	**100%**

* 0.00 indicates negligible number in Mn

Land Transportation

India has the second largest road network in the world at 5.4 million km.
The road network dominates the freight movement which constitutes around 63% of the total freight movement consisting of 2.2 million heavy duty trucks and 0.6 million light duty trucks annually. The road freight movement is expected to increase at a CAGR of 15%.
The Indian land transportation industry is fragmented and only 5-10% is organized.
The government has allotted Rs 64,000 Cr in FY17-18 budget for development of NHAI and Rs 27,000 Cr towards the PMGSY. NHAI plans to build 50,000km of roads by 2022.
The booming e-commerce sector, coupled with increasing demand from tier 2 & 3 cities/towns are propelling land transportation. There is increased demand for multimodal logistics providers in the segment, so as to capitalise the relative cost and effort efficiencies of different modes.



Drivers of Land transportation:

- Make in India drive
- Rapid growth in Auto, Pharma and FMCG
- Increased buying capacity of upper middle class
- Increasing consumer demand in Tier 2&3
- Investments in Bharatmala, Sagarmala and other infrastructural projects
- Increased international trade

Land Transportation

Universe Covered
Manufacturer to Distribution, Distribution to Retail, Market to Port, Market to Market movement of Goods (B2B & B2C)

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
M&HCV Drivers (Excludes passenger vehicles)	0.36	2.02	2.37
LCV Drivers (Excludes passenger vehicles)	0.30	1.69	1.99
Tractor Drivers (Includes only cargo movement)	0.05	0.28	0.33
Support System (Route planners, Booking executives, Documentation executives etc.)	0.02	0.13	0.16
Total Employment in Land Transportation	**0.73**	**4.12**	**4.84**
% Distribution	**15%**	**85%**	

Estimated growth of employment till 2020 (per annum)	~12%

Source & Notes:

1. Sale of MV in India, Page 26, Road Transport Year Book (2015-16), MoRTH
2. Tractor Sale in India, http://www.tmaindia.in/tractor-industry.php
3. Primary interaction done by IMaCS with SME and other stakeholders

Warehousing

The projected warehouse space in India is around 2500 Mn Sq. ft..
The top seven markets for warehouse include Mumbai, NCR, Bengaluru, Chennai, Pune, Hyderabad and Ahmedabad.
The implementation of GST is driving consolidation in the warehousing industry, the cost of warehouse operations is estimated to reduce by 25-30% for FMCG and 45-50% for consumer durables
The different types of warehouses included as a part scope of this study are,

- Public warehouses
- Private warehouses
- Bonded warehouses
- Government warehouses and
- Cooperative warehouses
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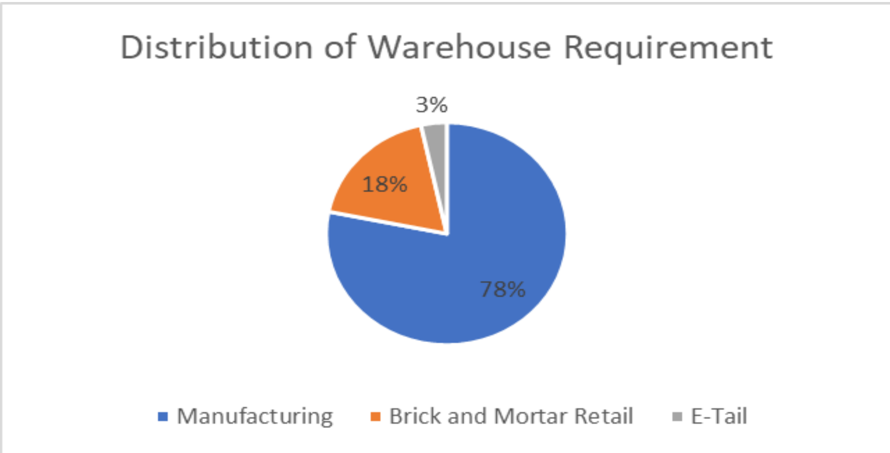


Drivers of Warehousing Industry:

- Growth of manufacturing activity – auto & ancillary, chemical, and pharmaceutical are the leaders
- Advent of e-tail and fulfilment centres
- Increasing private and foreign investment in infrastructure and retail
- Consolidation of industry as a result of GST implementation

Warehousing

Universe Covered
Manufacturer owned, 3PL/4PL services providers, Dealer/Distributor owned, Primary Sector, Warehouses of transporters

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Post Harvest Produce Warehouses	0.43	0.13	0.56
Post Harvest Mandi cum Warehouses	-	1.19	1.19
3PL/4PL and Goods Warehouses	1.34	0.75	2.09
Total Employment	**1.77**	**2.07**	**3.84**
% Distribution	**46%**	**54%**	

* - indicates negligible number in Mn

Estimated growth of employment till 2020 (per annum)	~10% per annum

Source & Notes:

1. Knight Frank, India Warehousing Market Report, 2016
2. No. of Registered Warehouses in India, Page 19, WDRA Annual Report 16-17
3. No. of Primary markets by National Council of State Agricultural Marketing Boards (COSAMB)
4. Primary interaction done by IMaCS with SME and other stakeholders

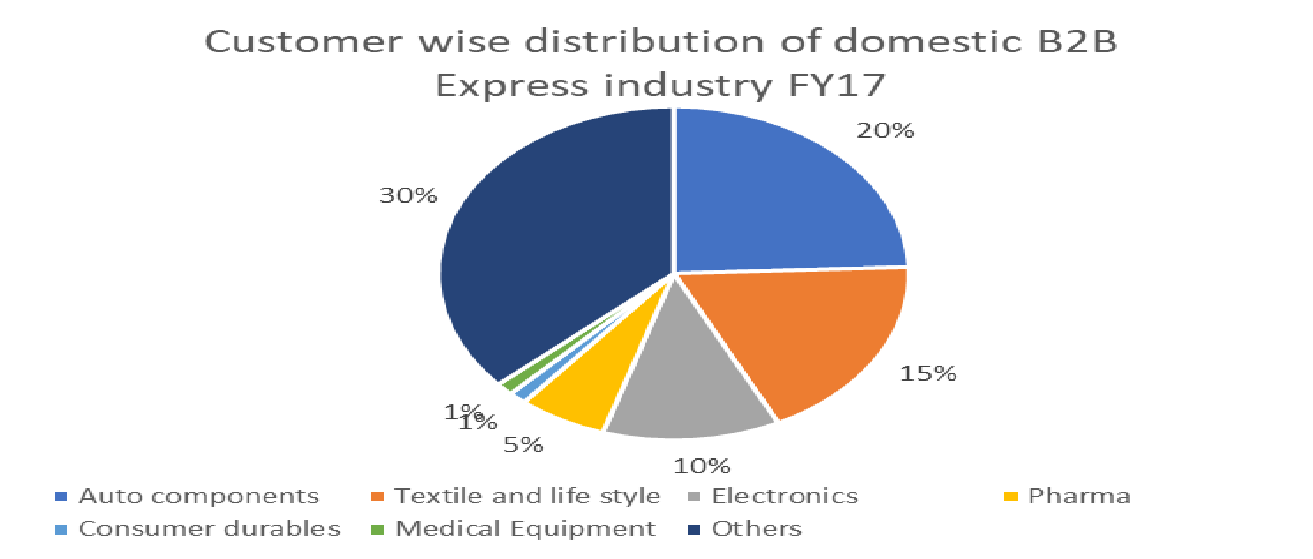
Courier & Express

The Indian Courier/Express is estimated to be Rs 22,000 Cr in FY ‘17 and is expected to grow at a CAGR of 17% for the next 5 years and reach Rs 48,000 Cr in FY ’22. The global express market was estimated to be USD 198 bn in 2016 and Indian industry contributes to only 2% of it.

The industry is highly fragmented with more than 1000 players. There are close to 20-30 large players who contribute to 75-80% of the market share in terms of revenue.

B2C market contributes to 41% of the market and B2B shipments contributes to 59% of the market. The Rs.7000 Cr B2C domestic market is dominated by Ecommerce at Rs.5000 Cr and is followed by BFSI at Rs.1000 Cr.

Shipments of documents contributes to 18% of the domestic shipments and non-documents contributes to 82%.



Drivers of Courier/Express Industry:

- Growth of e-tail, driven by internet and smartphone penetration
- Manufacturing growth
- Growth of MSME
- Increasing investment in logistics infrastructure and easing of goods transit norms
- Ability to invest and scale up quickly through implementation of technology solutions

Source & Notes:

1. Indian Express Industry 2018, by EICI and Deloitte

Courier and Express

Universe Covered
Organized Courier/Express agency covering - Central operations, Regional operations, Branches, Franchisee; Regional Express/Courier agencies; Dabbawallas of Mumbai; Bus Parcel Service; Last mile ecommerce delivery

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Express/Courier	0.76	0.21	0.98
Bus Parcel Service	0.12	0.12	0.24
Last Mile E-com Delivery (Including food)	0.15	-	0.15
Dabbawalas of Mumbai	0.01	-	0.01
Total in Express/Courier	**1.04**	**0.33**	**1.37**
% Distribution	**76%**	**24%**	

* - indicates negligible number in Mn

Estimated growth of employment till 2020 (per annum)	~10% per annum

Source & Notes:

1. EPFO company data
2. Number of busses owned by Public and Private Sector in India, Page 27, Road Transport Year Book (2015-16), MoRTH
3. http://mumbaidabbawala.in/#about-us
4. Primary interaction done by IMaCS with SME and other stakeholders

Cold chain logistics

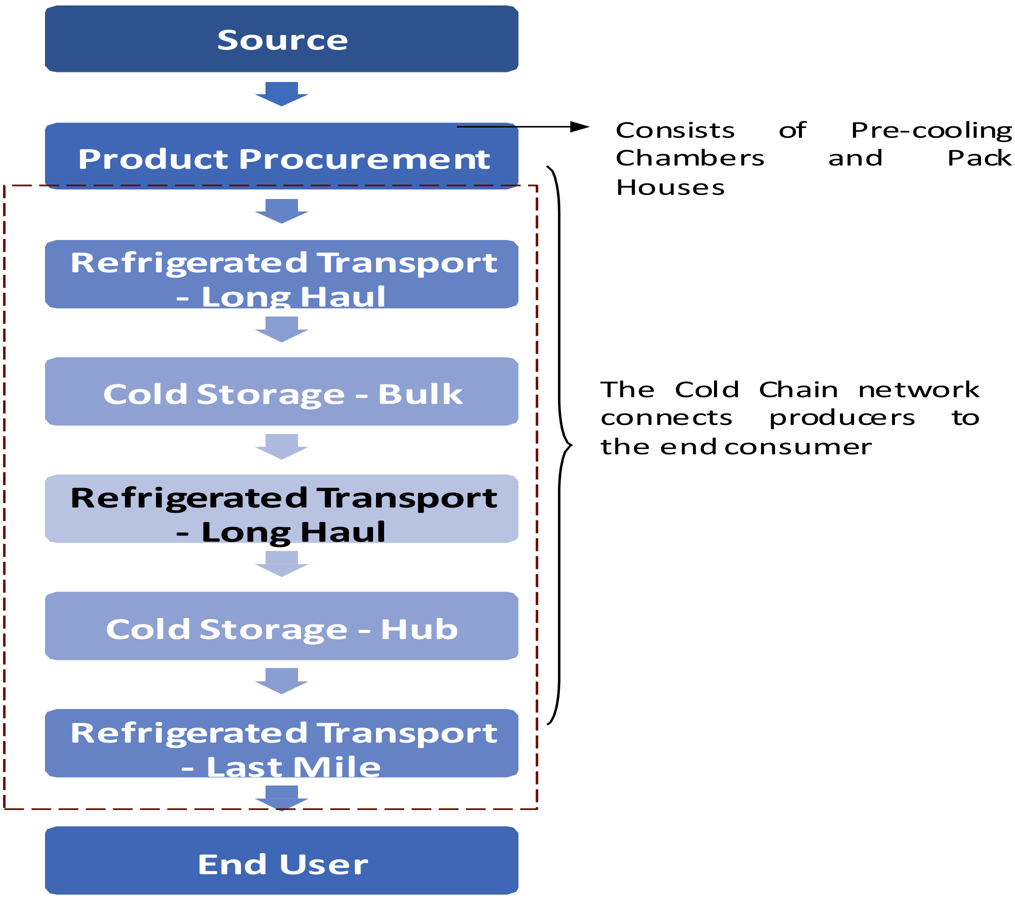
Cold chain encompasses:-

1. Cold storage warehouses – 88% to 90%
2. Reefer vans, reefer trucks , non-reefer cold transport – 10% to 12%
3. Supply chain solutions specialised for movement of temperature sensitive goods and online tracking

The Indian cold chain logistics industry was estimated to be Rs. 624 billion in FY'17 growing at a CAGR of 20%.

Type of goods covered – Horticulture, Dairy products, meat fish and poultry, processed foods and pharma life sciences and chemicals

The industry is highly fragmented with over 3500 players in the industry and organised sector accounting for only 12% of the industry. There are ~ 6300 cold storages facilities in India with a combined capacity of 30.11 million tonnes. Uttar Pradesh (42%) and West Bengal (18%) account for most of the cold storages across India.



Source & Notes:

1. http://indiacoldchainshow.com/Cold-Chain-Industry-in-India-A-Report.pdf

Cold Chain Logistics Solutions

Universe Covered
Post harvest produce, processed food, sea food, poultry, meat, pharmaceuticals

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Cold Storage	0.013	0.121	0.135
Reefer operators	0.002	0.020	0.022
Total Employment	**10%**	**90%**	**0.157**

Estimated growth of employment till 2020 (per annum)	~12% per annum

Source & Notes:

1. MoFPI- National Centre for Cold Chain Development - Reports
2. Primary interaction done by IMaCS with SME and other stakeholders

EXIM logistics - Freight Forwarders and Customs clearance

Exim logistics encompasses –

1. Freight forwarding
2. Custom clearance

There are close to 6500 EXIM logistics firms, with close to 85% them falling in the SME bracket.

The industry is directly dependent on the freight movement and merchandise export or import into the country. With recent developments with respect to IT integration of custom clearance process, and estimated growth in foreign trade, the demand for IT specialised EXIM logistics is expected to increase and IT and computer literacy would be a key driver for the employment in this industry the coming years.

Drivers of EXIM Industry:

- Increase in formation of custom bonded ICDs and CFS
- Streamlining of custom clearance process to reduce time for export and import
- IT integration in EXIM processes
- Growth of foreign trade

Source & Notes:

1. Primary inputs

EXIM Logistics- Freight Forwarders and Customs clearance

Universe Covered
Freight Forwarders, Customs Agents, CHA

Present Estimated Employment	Organised (in Mn)
Freight Forwarders, Customs Agents, CHA	0.11
Global Shared Services	0.01
Total Employment	**0.12**

Estimated growth of employment till 2020 (per annum)	~7%

Source & Notes:

1. Federation of Freight Forwarders' Association of India
2. Primary interaction done by IMaCS with SME and other stakeholders

Inland waterways and marine services

The Inland Waterways covers:-

1. Freight transports across major national waterways
2. Near coastal services

India has 14500 km of navigable waterways through rivers and canals, out of which 5,200 km (36%) of major rivers and 485 km (3%) of canals have the capacities to handle mechanized vessels. Out of these 4363 km (30%) is currently operational as national waterways 1 to 5

Inland Waterways Act, 2016 was notified declaring 111 NWs (106 new and 5 existing)

The industry is in a very nascent stage which has recently come to light with increased focus on development of inland waterways under Sagarmala project The industry is highly fragmented and unorganized with many operators operating local vessels and barges for transport of cargo and passengers across major rivers.

5 major national waterways:

NW 1 - Allahabad to Haldia – 1620 Km on the river Ganga, Bhagirathi and Hoogly

NW 2 - Sadiya to Dhubri on river Brahmaputra – 820 km

NW 3 – West Coat canal in Kerala connecting Kollam to Kottapuram – 205 km

NW 4 – Kakinada to Puducherry via Eluru and Buckingham canals – 1095km

NW 5 – Talcher – Paradeep – Haldia – 623 km

Drivers for the Industry:

- Development of terminals and cargo loading/unloading connections across major rivers and channels
- Providing a dedicated road or rail line to the port for cargo transports
- Increase in awareness and regularisation of cargo and passenger transports across major waterways

Source & Notes:

1. Secondary sources

Inland Waterways and Marine Services

Universe Covered
Inland waterways movement, hinterland operations, vessel operations

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Inland waterways employment	0.015	0.085	0.1
Total Employment	**15%**	**85%**	**0.1**

Estimated growth of employment till 2020 (per annum)	~4% per annum

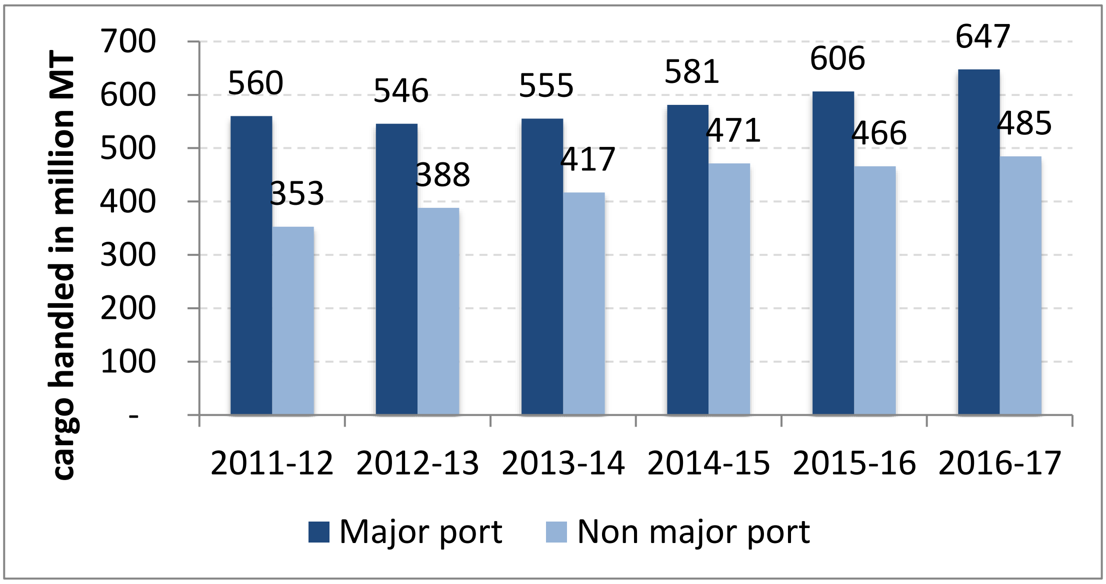
Source & Notes:
1. Primary interaction with National Inland Navigation Institute and Inland Waterways Authority of India
2. Primary interaction done by IMaCS with SME and other stakeholders

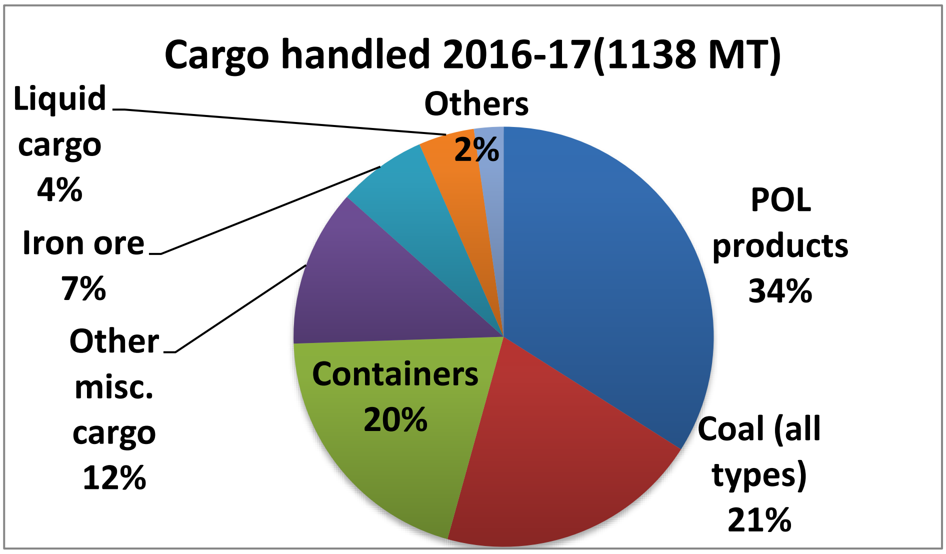
Port terminals, ICD and CFS

Port terminals accounting of over 55% of the foreign trade from India.

There are 12 major ports and ~68 minor ports in India that account for foreign as well as domestic trade. The total traffic handled by Indian ports stood at USD 643 billion in 2016 growing at a CAGR of 7.4% between 1981 and 2016.

Indian ports handled 1132 Million MT of cargo in 2016-17 growing at 4.3% CAGR from 913 Million MT in 2011-12.





Port Terminals, ICD and CFS

Universe Covered
Major and Minor ports, ICD and CFS

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Port & Stevedore Operations	0.06	0.02	0.07
ICD and CFS	0.01	-	0.01
Total Employment	**0.07**	**0.02**	**0.08**
% Distribution	**80%**	**20%**	

* - indicates negligible number in Mn

Estimated growth of employment till 2020 (per annum)	~4% per annum

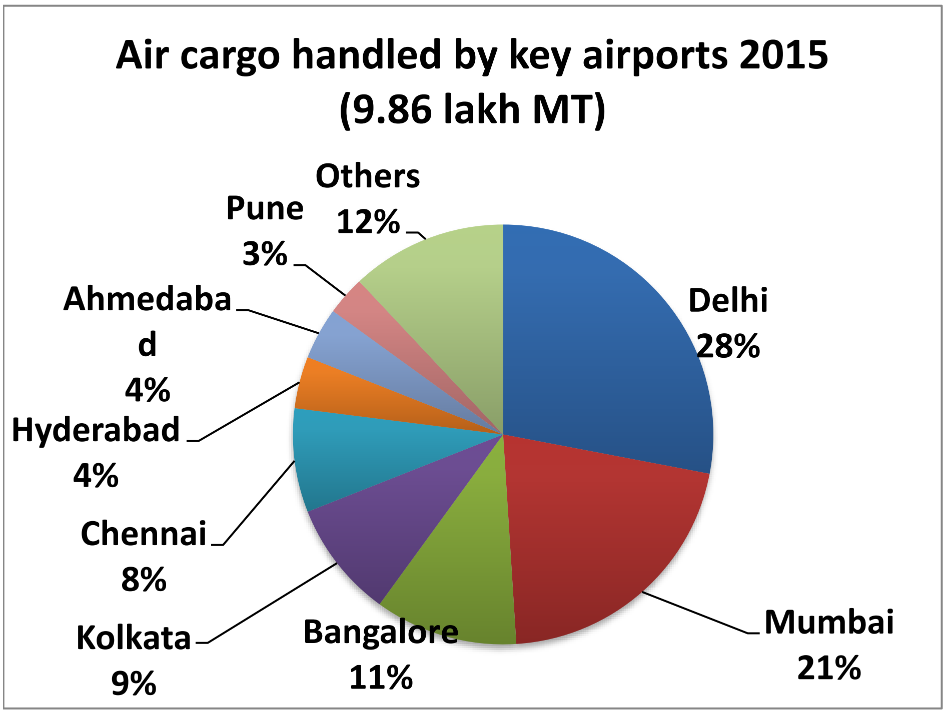
Source & Notes:

1. Employment in Indian ports as per Table-32.23 of MoSPI
2. Primary interaction with Stevedore associations
3. Primary interaction done by IMaCS with SME and other stakeholders

Air cargo operations

Domestic air freight traffic increased from 456,000 MT in FY05 to 986,000 MT in FY'15.

91% of the domestic freight traffic is concentrated in the top 10 airports.



Drivers of air cargo logistics Industry:

- Growth in foreign trade of high value commodities
- Focus on modernisation of airports with up to date cargo handling facilities
- Increase in trade of perishables
- Increase in PPP and private investment in airport modernisation

Source & Notes:

1. IMaCS report

Air Cargo Operations

Universe Covered
Air Freight Station and Air Cargo Terminal Ground operations (Land Side)

Present Estimated Employment	Organised (in Mn)
)Total Employment	0.062

Estimated growth of employment till 2020 (per annum)	~4% per annum

Source & Notes:

1. Skill gap analysis for MoCA
2. Primary interaction done by IMaCS with SME and other stakeholders

E-commerce

E-commerce sector was estimated at US$ 15 billion in 2016. It is growing at a CAGR of 34% and is expected to reach US$64 billion by 2020 and US$188 billion by 2025.

The e-commerce logistics players can be broadly classified as:

- *Captive/In-house logistics providers* – Dedicated captive logistics arms of E-commerce companies
- *Third party logistics (3PL) - Traditional players that have forayed into E-commerce*
- *E-commerce focussed logistics service providers (LSP)* – Dedicated 3rd party logistics service provider only for E-commerce

Source: IBEF, secondary sources

E-commerce

Universe Covered
E-commerce companies

Present Estimated Employment	Organised (in Mn)
Backend operations (support)	0.02

Estimated growth of employment till 2020 (per annum)	~3% per annum

Source & Notes:

1. Primary interaction done by IMaCS with SME and other stakeholders

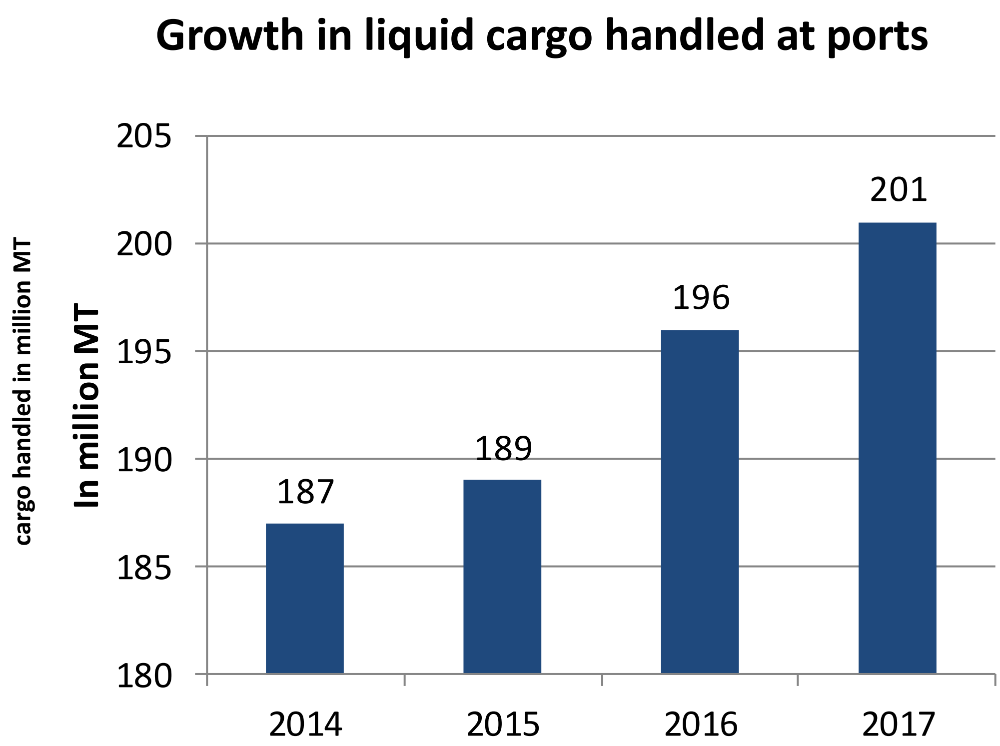
Liquid logistics

The total liquid bulk cargo handled at major ports in India amounted to 201 million MT in 2017 growing at a CAGR of 3% from 2014 to 2017. POL products accounted for over 65% of total liquid bulk cargo mainly handled by captive storage units of different refineries.

The tank farm industry in India is mainly constituted of -

1. Captive tank farms, operated by key petroleum companies – IOCL, BPCL, HPCL, Reliance
2. 3rd parties providing liquid storage solutions for chemical, bulk POL and edible oil storage. - Indian Molasses Company (IMC), Adani Ports and SEZ , Aegis Ltd., etc.

Increased focus on IOT and computer managed controls, would create demand for highly skilled technicians and operators while reducing the demand for current loading/unloading and basic maintenance crew.



Source: JLL report on logistics - 2017

Liquid Logistics

Universse Covered
Liquid terminal operations, tank farm and pipeline operations

Present Estimated Employment	Organised (in Mn)
Total Employment	0.015

Estimated growth of employment till 2020 (per annum)	~2% per annum

Source & Notes:

1. Primary interaction done by IMaCS with SME and other stakeholders

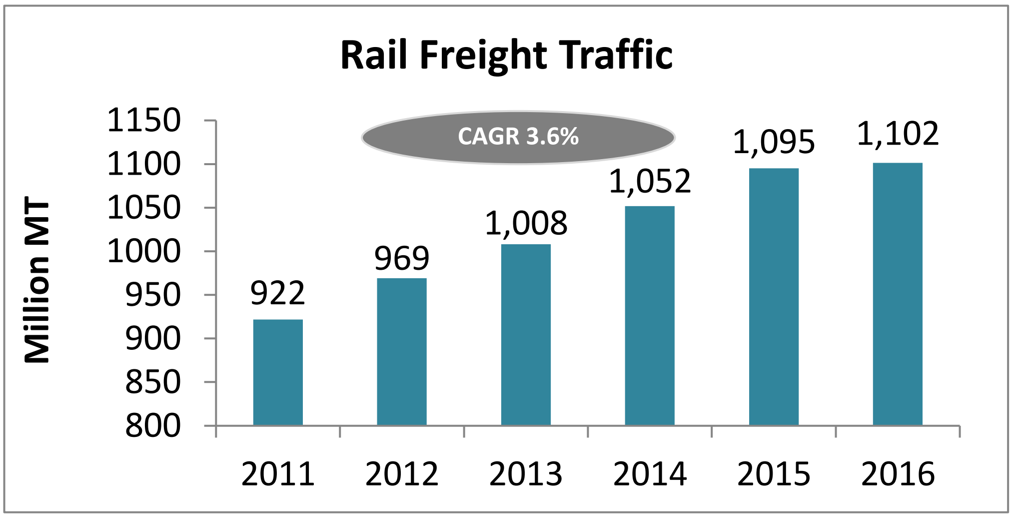
Rail logistics

The Indian Railways route length network is spread over 115,000 km with7,421 freight trains each day from 7,349 stations plying 3 million tonnes (MT) of freight daily.

The Indian railways recorded its best ever freight loading in FY ‘18 at 1,162 Million MT as compared to 1,109 Million MT in FY ‘17 recording a revenue of Rs. 1.17 lakh crore from freight operations recording a 7% growth over FY ‘17.

Key initiatives –

- National rail plan strongly emphasizes on freight operations and aims at increase freight handling to 3000 million MT from current 1,162 million MT by 2030.
- The Govt. plans to spend on station redevelopment with assistance from World bank to upgrade facilities at Indian railways
- Tie ups for development of High speed corridors, DMIC and plans to include high speed trains are expected to promote freight handling by railways significantly in the medium to long term



Drivers of rail logistics:

- Development of dedicated freight corridors
- Inclusion of high speed trains
- Competitive freight handling costs
- Upcoming facilities for cargo handling at stations
- High penetration across the country

Source & Notes:

1. National rail plan, IBEF, Economic times

Rail Logistics

Universe Covered
Rail operations by ports and private parties and excludes operations by Indian Railways

Present Estimated Employment	Organised (in Mn)
Total Employment	0.005

Estimated growth of employment till 2020 (per annum)	~2% per annum

Source & Notes:

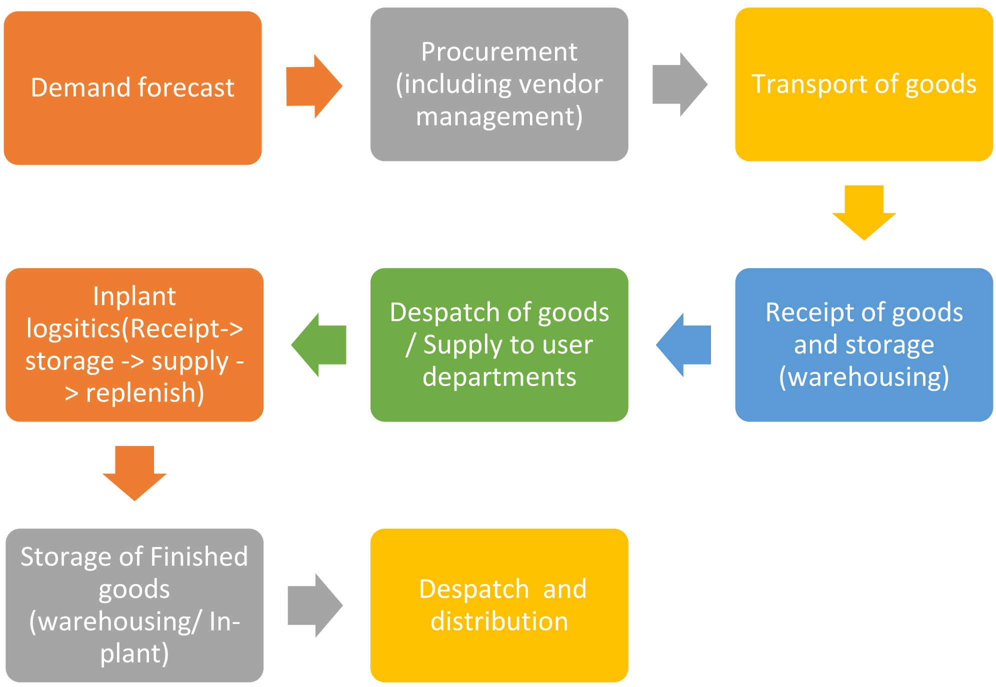
1. IPRCL projects
2. Primary interaction done by IMaCS with SME and other stakeholders

Supply Chain

Logistics technically is a part of supply chain. While SCM is more strategic in nature, logistics is more operations-oriented. SCM encompasses planning activities, implementation, control of the efficient forward and reverse flow and storage of goods, services and related information between the point of origin and the point of consumption in order to meet customer and legal requirements. The activities involved in a typical supply chain are typically inbound activities or outbound activities; inbound logistics refers to activities relating to bringing goods into the organization, while outbound logistics deals with activities relating to taking the goods out of the organization.

The value chain of supply chain activities is presented beside, this broadly includes,

- Inventory and demand planning
- Vendor development and management
- Receipt and storage of goods
- Movement of goods in-house and back to storage
- Storage of finished goods
- Dispatch and distribution of finished goods



Supply Chain

Universe Covered
Manufacturing Supply Chain operations, In-plant logistics, Project management, Offshore supply chain, 3PL/4PL Players

Present Estimated Employment	Organised (in Mn)	Unorganised (in Mn)	Total (in Mn)
Supply Chain	1.59	0.53	2.12
% Distribution	75%	25%	

Estimated growth of employment till 2020 (per annum)	~7% per annum

Source & Notes:

1. ASI 2015-16 data on organised manufacturing
2. Page 21 of Report No 525(62/2.2/2) Unorganized Manufacturing Sector In India
3. Primary interaction done by IMaCS with SME and other stakeholders

Logistics Labour Market Information System

- LMIS is an integrated set of institutional arrangements, procedures, mechanisms and data systems designed to produce labour market information
- The system brings together statistical (quantitative) and non-statistical (qualitative) information concerning labour market actors and their environment and generate key analysis and reports which can be used for various policy interventions by different government stakeholders, as well as by the industry at large.

Logistics Labour Market Information System

Need for LMIS

- Quantify the Logistics related jobs in different subsectors
- Create a transparent and dynamic system to capture the supply and demand for jobs
- Understand training requirements and targeted markets for employment generation
- Provide timely information on market and labour force data
- Assists companies understand the available labour pool and fine tune their recruitment strategies
- Connect aspiring candidates and companies for the right job and role match
- Reduce gap between labour supply and demand
- Measure the impact of technology and evolving trends which impact job demand
- Enables drafting and roll out of industry friendly policies
- Generate researchable data for long term planning and policy development

Stakeholders in LMIS

- Industries
- Industry associations
- Policy makers
- 3rd party manpower providers
- Training institutes
- Course content developers
- Students
- Job seekers
- Trainers
- Assessment agencies
- Intermediaries – counsellors, placement agencies
- Research agencies

Benefits of LMIS for various stake holders

Employers

- How many trained personnel will be available in a geography?
- What is the expected quality of candidates in a market?
- Which training institute provides the necessary trained candidates?
- Database of trained candidates

Students and Job seekers

- What jobs are in demand in the sector and where?
- What are the courses that are available in the market?
- What is the quality of training institutes, trainers and the placement track record of institutes?
- Where do they stand in reference to other candidates in terms of qualification?
- What is the cost of undertaking courses and the government/private financing options available?

Training providers

- What jobs are in demand in the sector and where?
- What are the emerging trends and requirements of the industry?
- How to be up to date with the industry requirements?
- What is the anticipated training market in a location?
- Whom should they approach for placement?
- What is the cost of running a training course and the RoI expected?
- Training market place in the geography

Benefits of LMIS for various stake holders

Government and Policy Makers

- What is the demand jobs in a geography?
- What is the gap between supply and demand?
- How to raise awareness among the job seekers regarding availability of jobs and related training infrastructure?
- How to cost and structure training programs?
- How to plan and fund training programs?
- How to measure the efficiency and effectiveness of training partners?
- How well do trained and placed candidates fare in the industry?
- Periodically understand industry feedback and update course, content, delivery and training methodology

Industry Associations

- How to develop skilling of the sector?
- Understand the varied needs of the different types of its members
- Undertake initiatives to upskill and promote adoption of best practices
- How to propose development policies to the government?

Research organizations

- Is the LMIS adequate to capture the industry trends, policies, market conditions and skill gap requirements?
- Is the LMI robust enough to capture the various information?
- Is the knowledge generated by LMIS being effectively used by different stakeholders effectively?
- Is the LMIS reflective of emerging trends and is able to capture the future skill requirements?
- What policy and operational changes have to be undertaken to bridge the industry requirements and training availability?

LMIS coverage

Logistics activity being a derived demand Labour Model (LMIS) to be developed will cover the following focal areas of logistics activity: -

- Logistics Infrastructure Corridor – Delhi Mumbai (DMIC)
- Manufacturing Industrial Cluster-Sri City in Andhra Pradesh,
- Sriperumbudur, Maraimalai Nagar and Oragadam in Tamil Nadu
- Air Cargo Terminal Complex- Delhi Air Cargo Terminal Complex
- Port and Port User Community -JNPT Port cluster
- National Inland Waterway – NW 1(Nodes - Haldia, GR Jetty-2, Farakka RCC, Pakur RCC, Patna, and Varanasi)
- E-commerce cluster

Key Deliverables

1. Job Role wise Demand for next 5 years covering 12 sub-sectors
2. Supply and Demand Status for all 12 sub-sectors in the following aspects,
3. Within Local
4. Intra-state Migration
5. Inter-State Migration
6. Skill development plan for next 5 years in Logistics Sector aligning Short Term Training/ NAPS/ Educational Training in Schools/ Colleges or University level requirement which will give a heads-up on aggregated skill training capacity required for both Fresh and RPL Trainings.

Key factors as output of Logistics Skill Plan (LSP)

Based on the LMIS study, Logistics Skill Plan (LSP) will be developed,

this will incorporate,

a. Estimated current and projected demand for logistics job roles
b. Demand in terms of sub-sectors, job roles and numbers basis the data
c. Supply side availability in clusters (local, migratory and international), school / college dropouts, Capacity Building (Existing, build and required methodology). All this will be worked out and dovetailed to Govt. Schemes (Central / State / Ministry based).
d. Emerging trends and technology in the sectors and its influence on training requirements
e. Industry initiatives which could be undertaken to promote up skilling and fresh skilling
f. Capacity development required among existing training providers
g. Recognition of Prior Learning potential in the clusters
h. Investment required for training infrastructure setup
i. Leverage LSP to identify logistics infrastructure such as Logistics Park, Logistics Cluster for Employers on investments
j. LSP will be approved at the Cabinet Committee level for implementation of Schemes by Various State / Central Govt.

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