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CSR COVID Response and Outlook for '20-21

Average annual CSR in India is around INR 15,000 Crore.

Top 300-odd companies contribute 2/3rd – INR 10,000 Crore.

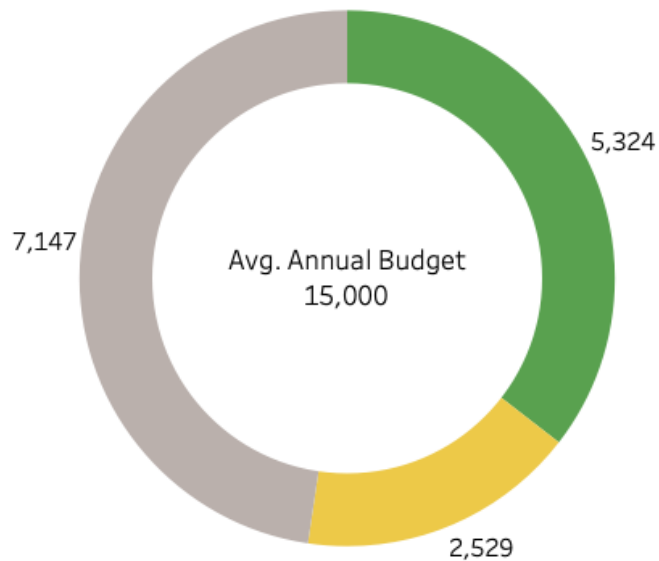
We analysed the top 300 companies. Counting them plus the group CSR announcements, more than half the annual CSR – INR 7863 Crore is allocated to COVID relief measures.

The current COVID allocation by corporate India :

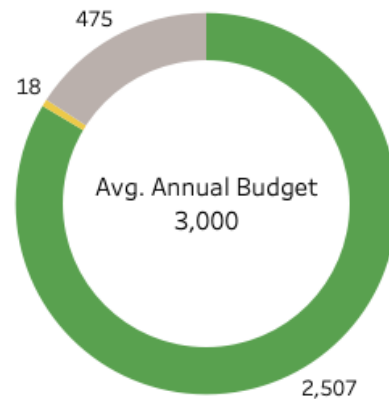
- INR 5,324 Crore donated to PM-Cares
- INR 2,529 Crore allocated for COVID relief
- INR 9 Crore donated to NGOs for COVID relief

Assuming the CSR budgets for this year are not affected, around INR 7137 Crore will be available for other CSR projects, if companies do not make further allocations for COVID response.

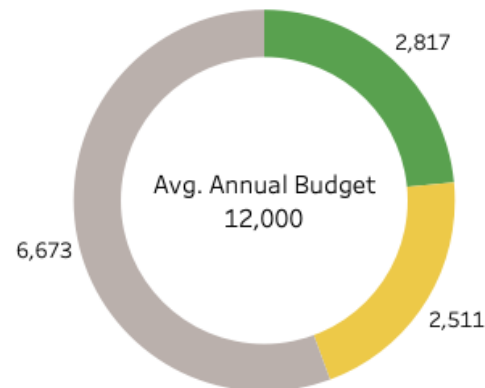
CSR - COVID Response and Outlook for '20-21 (INR Crores)



PSU



PVT



- Donated to PM-Cares fund
- Committed to other COVID relief
- Potentially available for non-COVID projects

Sources: Company and Govt. press releases, CSR data from MCA, IDI analysis

Notes: Donated to PM-Cares fund - Donation made under PM Cares fund; Committed to other COVID relief - Funds committed but not necessarily utilized yet; Avg. Annual Budget has been derived from the trends of 2014-17 time period based on data from MCA

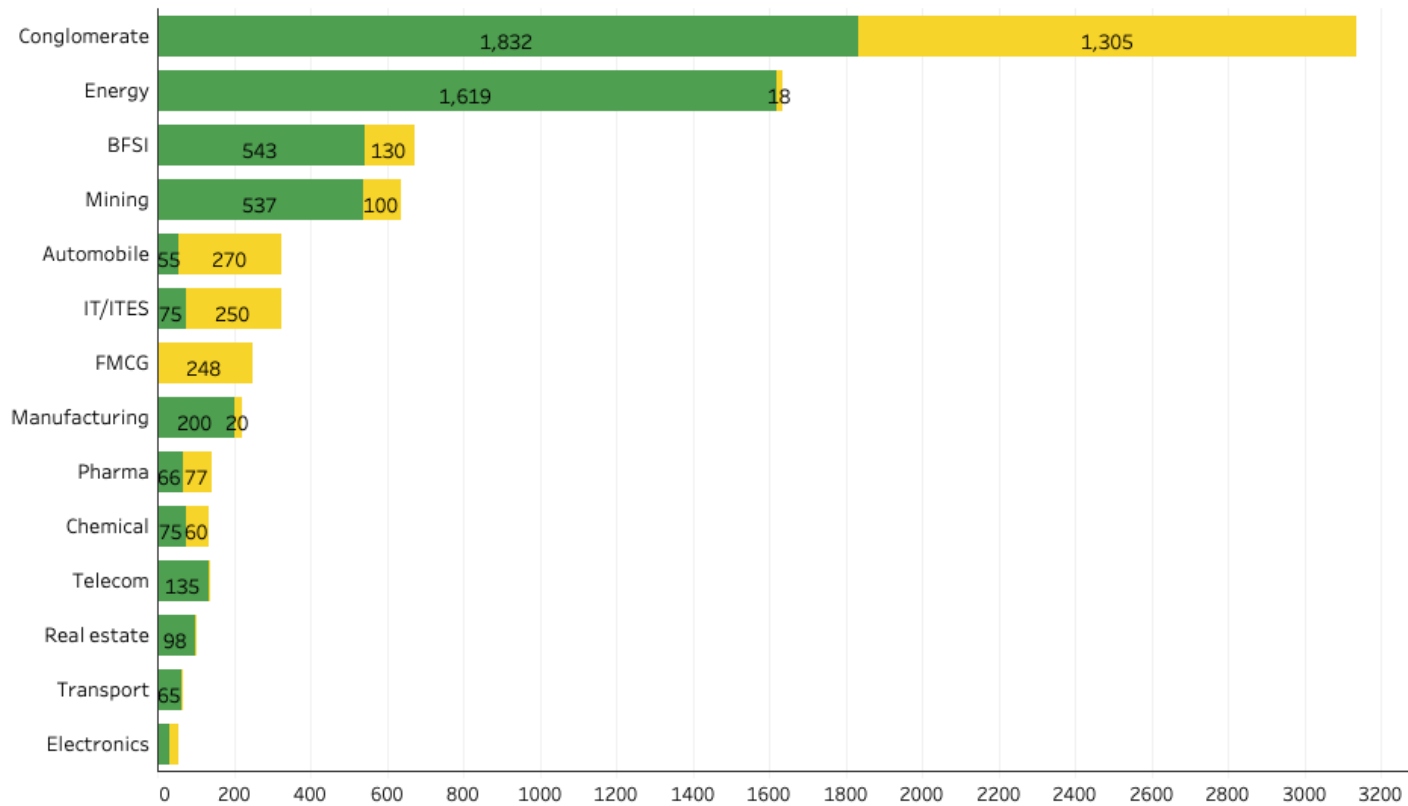
PM National Relief Fund historically has received INR 200 Crore annually from corporate CSR contributions.

PM Cares Fund set up for COVID response has garnered 25x - more than INR 5300 Crore in a month.

PSUs that typically have an average annual CSR budget of INR 3000 Crore have donated more than INR 2500 Crore to PM Cares and have set aside another 18-20 Crore for COVID relief.

Non-government companies typically have an average annual CSR budget of INR 12000 Crore. They have allocated more than INR 5300 Crore (PM-Cares donation worth INR 2825 Crore plus INR 2510 Crore in provisions) for COVID relief.

CSR - COVID Response and Outlook for '20-21 by Industry (INR Crores)



■ Donated to PM-Cares fund

■ Committed to other COVID relief

Private industrial conglomerates have been the most generous category contributing more than INR 1830 to PM-Cares and setting aside another INR 1300 Crore for COVID relief measures to be taken as needed.

Oil, gas, petroleum and energy sector, dominated by the PSUs, is next with INR 1600 Crore in donations to PM-Cares and INR 18 Crore in provisions. About half of the industry's annual CSR budget is thus allocated for COVID relief.

BFSI (largely private) and Mining (mostly PSUs) have made almost similar contributions of around INR 530 Crore to PM-cares and provisions of INR 100 Crore each.

Heavy machine and equipment manufacturers have contributed INR 200 Crore, telecom INR 135 Crore, construction and real estate nearly 100 Crore to PM-Cares.

IT/ITES has made donations worth INR 75 Crore to PM-Cares in addition to significant tech support and has set aside INR 250 Crore for more COVID work – their average CSR annually is upwards of INR 2000 Crore.

Notably, mining industry has donated most of its budget to PM-Cares and FMCG industry has allocated most of its budget for COVID response.

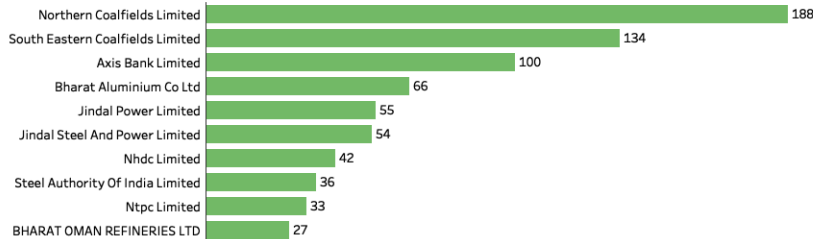
Chemicals and pharmaceuticals industry has allocated about 1/4th of their annual CSR budget for COVID relief.

Central and Eastern regions of India together receive less than 10% of CSR pool. Their biggest contributors are PSUs from mining, energy and oil and gas industries. These companies have now allocated majority of their CSR fro COVID relief, putting their regular CSR activities at risk. These regions are lagging behind on most SDGs and are chronically under-funded.

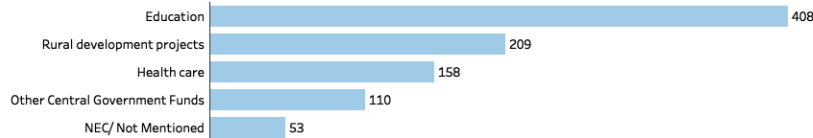
CSR Spend in Central Region (2014-18)



Top Spenders



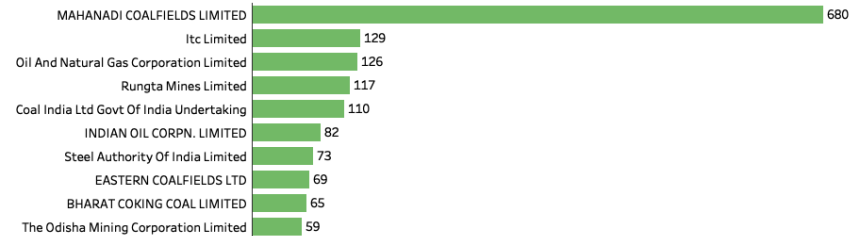
Top Sectors Receiving CSR Funds



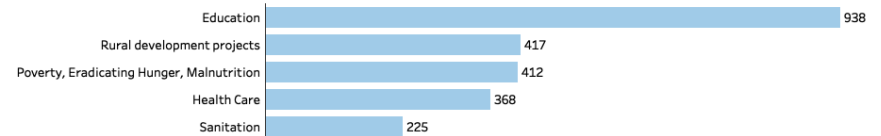
CSR Spend in Eastern Region (2014-18)



Top Spenders



Top Sectors Receiving CSR Funds

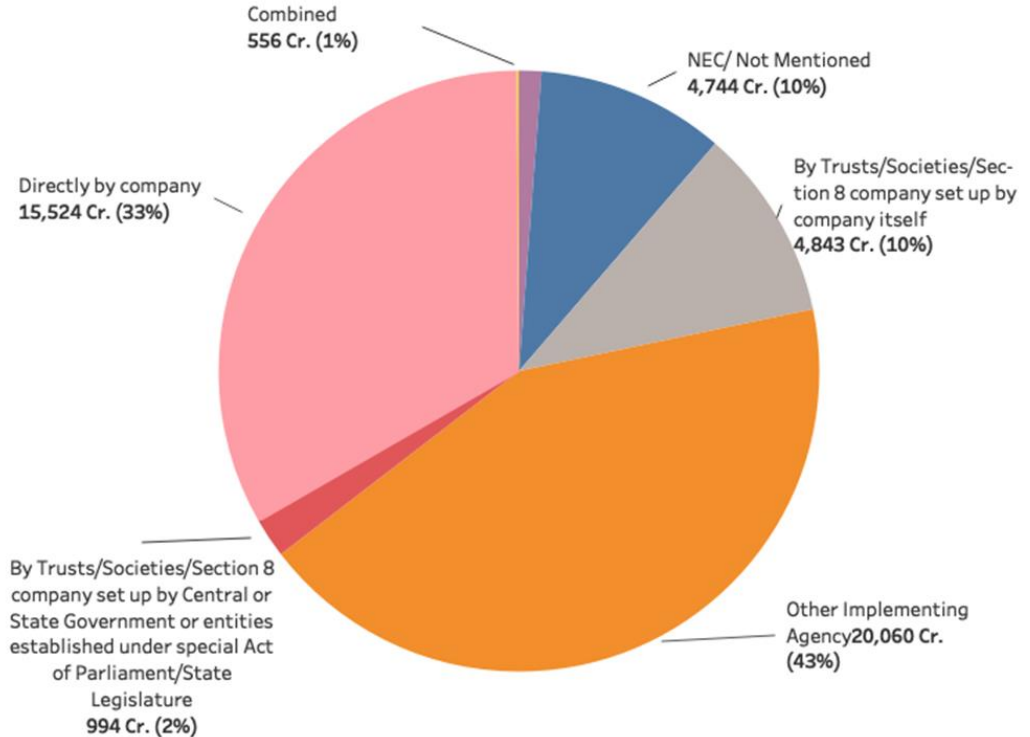


Usually about 50% of the total CSR budget, that is around INR 7500 Crore, is deployed through NGOs as implementation agencies.

With half of the entire CSR already allocated to Covid relief, how much of the remaining half will go the regular projects NGOs were running?

An estimated CSR funding of around INR 3500-4000 Crore may remain available to regular CSR projects through NGOs as compared to around INR 7500 Crore available previously.

CSR Spend (2014-18) - Mode of Implementation





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