



PALM OIL INDUSTRY TRANSFORMATION : TFT'S PERSPECTIVE ONE YEAR LATER

In March 2013, TFT released a short strategy paper called 'an approach to transforming the palm oil industry: lessons learned and ideas from TFT' in which we shared some elements of our vision of how the palm oil industry could become more socially and environmentally responsible.

In summary, those key elements were :

1. Companies should develop their own sourcing policies and not rely on certification schemes to do so.

To us, certification schemes are *only one way* to demonstrate a company's responsible sourcing policy. They aren't a global driver of market transformation. Worldwide, consumers know and recognise brands but they really don't know certification labels. In fact, they don't want to have to know about certification labels; more and more consumers expect the brands they like to take responsibility for themselves and make sure the products they put on the market are safe from all points of view – including avoiding moral harm to consumers (for example, by not being associated with deforestation, damaging natural beauty or disrespecting human rights).

2. Companies should be ambitious about what they want. They should apply the same desire for innovation and leadership across environmental and social quality as they would for the technical and marketing aspects of their products. They should not let their ambition be guided by what their suppliers can or cannot do today. Let's not shy away from being willing to stop deforestation or end forced labour links to products. Write it down on paper, back it up with time-bound action plans and make all these public. Innovative solutions will emerge and follow.

3. To transform the industry, traceability back to plantation (or group of smallholders) is essential in achieving sustainability.

No one can change what they cannot see. Palm oil is a commodity and is therefore very sensitive to anything that changes the way economies of scale and optimal logistics are reached in the supply chain. Segregating 'good' and 'bad' palm oil in every facility that processes palm oil or palm fractions is expensive and cannot lead to widespread industry transformation. Requests for segregated supply chains are therefore not recommended because of the large expense incurred through the logistics of segregating oil, while little benefit goes back to the plantation level where the leverage is needed. TFT proposed to work on existing supply chains to build 'catchment areas' (e.g. refinery, port) that can become 'hubs' for the supply of traceable, responsible oil with limited to no extra logistical cost.

One year later, the palm oil industry landscape has changed significantly – probably more than any other commodity in the same timeframe. It's now time to take stock of what happened in 2013 and look forward into the years to come, exploring the "unknown" together.

So, what's happened in the past 12 months?

Key company commitments have changed the shape of palm oil demand over the last 12 months

01. Leading brands

...have built on Nestlé's example and chosen to publicly issue *their own palm oil sourcing policy*. They have made *ambitious goals* to protect peatlands and HCS (High Carbon Stock forests) through No Deforestation commitments. Some companies have gone a step further by strengthening measures to protect workers and communities' rights through No Exploitation commitments, thus taking ownership for how palm oil sustainability is defined. Examples of such policies are (click on the name to access link):

[Ferrero](#) [Mars](#) [Reckitt Benckiser](#) [Safeway](#)
[Neste Oil](#) [L'Oréal](#) [Delhaize Group](#) [Vandemoortele](#)

Other major brands who made a No Deforestation company commitment in the past 12 months include Kellogg's, Hershey's and Unilever.



02. Major refiners and traders

...have also decided to issue their own palm oil sourcing policies and have made similarly ambitious goals regarding No Deforestation and No Exploitation, namely:

[Golden Agri-Resources \(GAR\)](#) [New Britain Palm Oil](#)
[Wilmar](#)

Other refiners and traders like Cargill have also been working hard in a more discrete way to better understand their supply chains.



03. Traceability

...is at the centre of those commitments. All the companies mentioned above have started to work on building traceability through first gaining better transparency of their supply chain, asking questions to their suppliers about where exactly the oil they are supplying comes from. Which mills? Which plantations? Is the oil coming from a region where there is deforestation or peatland destruction? Asking these questions is very different from simply asking for a certification (which previously was the only way to get traceability). In effect, when a brand asks for certification there is no collaboration; soon both the buyer and the supplier are at a dead end because the certified oil is either too expensive or not available, and it becomes a blame game, trying to find explanations about why it failed and whose fault it is.

With an approach based on company commitment that allows for the simple questions mentioned above to be asked, the relationship between buyer and supplier becomes a more constructive and collaborative dialogue: *“We are in it together, how do we make it happen?”* The buyer has to change behaviour and take interest in what the palm oil supply chains look like and understand what the supplier is saying about how it proposes to achieve traceable, No Deforestation or No Exploitation oil.

This type of dialogue has always existed to address product quality improvement. It has rarely existed to address sustainability, because sustainability was dealt with through certification, in a separate ‘silo’. By *reintegrating transparency of supply chains and work plans towards traceable, No Deforestation, No Exploitation oil* as one of the product quality specifications, constructive dialogue is happening again. It is fascinating to see all the people in the palm oil industry at refinery, trader and processor levels putting their innovative power in action to develop traceability and responsible palm oil solutions.

Nonetheless, as of today traceable oil is not yet available in large quantities on the market. There is a risk that requests for traceable oil alone, without the broader discussion of how to strategically move towards fully traceable and No Deforestation, No Exploitation palm oil, will just lead to expensive short-term solutions based on segregated supply chains that exclude smallholders. It is important that brands and refiners/ traders look at building traceability and responsible flow on 100% of their supply and don’t get distracted by short terms ‘fixes’ for certain customers based on segregation, because what looks simple and easy may end up more being rigid and costly in the long term. Those suppliers who are the first to have affordable traceable solutions concretely available on the market will very likely see their *market share* increase among committed brands.

In summary

The industry transformation as foreseen by TFT back in 2013 is actually happening and the conditions are set for economically viable solutions to emerge. We see solutions that can satisfy both the ‘mature’ economies that are more concerned about sustainability AND at the same time emerging economies that are still looking for an affordable source of vegetable oil to feed a growing population.

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We also notice that instead of spending huge amounts of money and energy to try to align on principles and policies in a pre-competitive way (and enter into complex, time-consuming roundtable political discussions), brands and suppliers have been engaging their forces and resources in a race to the top by making their own commitments (that they can own and believe in) which they are now supporting in most instances with strong and concrete action plans.





The palm oil industry has suffered a lot of criticism in the past but it is time for the world to acknowledge the first steps of a significant adaptation process from its leading players. These steps pave the way for other industry players to follow, therefore allowing quick, meaningful transformation. They are also beginning to restore global trust in a commodity that is extremely valuable to the world.

At TFT we like to compare this business-led organic transformation to a flock of migrating birds flying towards a place where they can thrive. In this image, birds would be companies who alternatively lead meaningful change, flying together in the same direction (a more responsible palm oil industry), independent and free but bound by the invisible links of common values, vision and instinct for survival. We call this *'the Murmuration'*.

High Carbon Stock Forests : from concept to reality

Making traceability and strong policy commitments is only the first step of the transformation. Putting those commitments into practice by making them concrete and technically viable is the next one. Significant innovative initiatives have been put into practice by businesses and NGOs in order to find practical solutions to balance forest conservation and plantation development. It is important to acknowledge this progress as well as the remaining opportunities for improvement going forward.

01. Pilot in Indonesia

When Nestlé announced its No Deforestation policy in 2010, followed in 2011 by GAR's Forest Conservation Policy (FCP), neither of those companies, nor TFT, had a precise idea of how to define deforestation. There was concern that methods for setting aside forest only protected primary, or very special, forests, and that the secondary forests which may be degraded in some ways, but still important as habitat and carbon sinks, were still being cleared.

There was discussion around establishing a carbon threshold of 35 tonnes of carbon per hectare above-ground to be used as a proxy for forests that needed to be protected, but that was all. Firstly, one needed to define what a forest was in order to be able to protect it. This need for innovation triggered the most unusual collaboration: Greenpeace, TFT and GAR went out in the field together in Kalimantan to measure trees, look at vegetation types and pool our ideas about meaningful and practical tools that could be used to define forests. This ultimately resulted in what is today known as the HCS methodology, which in summary is a rigorous methodology that consists of:

1. Stratifying the forest by defining classes of vegetation according to their density by using satellite images.
2. Verifying the accuracy of the stratification on the ground by measuring the diameters of sample trees in the field in order to calculate estimated carbon content (through the use of research-based allometrics).
3. Defining which classes of vegetation should be set aside and conserved versus those that could be developed on the basis of their above-ground carbon content.
Put in a simple way, those that have a high carbon density = many trees of significant diameter = forest. Those that have a low carbon value = few trees of smaller diameter or grasslands = non-forest.
4. Evaluating whether the areas of forest that are intended to be set aside can remain forest in the long term and if they can really support biodiversity.
5. Evaluating whether the areas earmarked for conversion make business sense - taking into account the practicality of planting and plantation management operations.
6. Involving expert stakeholders in the process to gather scientific input on biodiversity, social aspects or other issues. In particular, participatory mapping must be carried out involving the local communities. All of this input is then included when finalising the areas to be set aside and the areas for development.
7. Involving the government to discuss how the areas to be set aside can be conserved in the long term through joint efforts among the communities, the company and the government.





The pilot work took place in a GAR concession called PT KPC and was scientifically peer reviewed. It allowed for many practical discussions between Greenpeace, expert conservationists (e.g. Zoological Society of London), palm oil plantation experts from the company and TFT. Eventually some middle ground was reached and the basic methodology was agreed.

02. Pilot in Liberia

At the beginning of 2013, TFT, Greenpeace and Golden Veroleum Liberia (GVL) sat down to discuss how the HCS methodology could be piloted in Liberia. The country is one of the last in West Africa with a dense tropical forest cover. At the same time, Liberia is in desperate need of development, and the government is committed to eradicating poverty by bringing in jobs through the exploitation of its natural resources. Large mining and agricultural investors proposing in-country industrial development have been welcomed over the last five years and have been allocated land and concessions by the government. GVL is one of them, aiming to develop over 200,000 hectares of oil palm plantations and create 35,000 jobs.

TFT went to Liberia in January 2013 to identify potential HCS forest clearance that had been detected through satellite data. GVL immediately adjusted its operations by halting its expansion, and embarked on a process aimed at identifying HCS forest in Liberia and potential development areas.

Important notes:

We found that the carbon value of the threshold between forest and non forest isn't 35 tonnes/ha. Instead the average above-ground carbon value was 27 tonnes of carbon per hectare for non-forest and 60 tonnes of carbon per hectare and above for forests in Indonesia. Again, this value might be different for other countries in the world and it shouldn't be taken as a value applicable in a standard way throughout the world.

While the average above-ground carbon value per hectare is an important measure it is more important that the stratification of the land cover is performed accurately to identify the changes between land cover types that are considered forest (regenerating forest and above) and those that are non-forest (scrub and below).

The HCS methodology is a practical tool that enables oil palm development to focus on areas of degraded land. HCS is an important component of the land use planning process together with social participatory maps, High Conversation Value areas, buffer zones, etc. prior to plantation development.

The HCS methodology relies on robust High Conversation Value assessments and deep engagement with local communities to define a land use plan that incorporates a co-management approach to areas planned for conservation.

From then on, the company completely reshaped its development plans and applied the HCS methodology that had been applied in GAR's PT KPC operation in Indonesia. The following challenges emerged:

- There was little trained capacity on the ground to measure trees and ground-truth the satellite data.
- Liberia has a forest degradation pattern that is slightly different from Indonesia, and proportionally more dense forests remaining in the landscape. The group could not copy and paste exactly the same threshold values for development and conservation.
- Participatory mapping allowed the company to identify community areas and farmlands, but there is no precedent for engaging them in a long term conservation effort.

After a year of work, the extensive training of over 40 GVL Liberian team members, thousands of field measurements in extremely challenging conditions, and many meetings, GVL, Greenpeace and TFT reached a provisional agreement on the foundation of what could

be an acceptable landscape plan featuring a balance between development and conservation in the given pilot area.

The group presented this outcome to the Liberian government in November 2013, who welcomed the invitation and supported the outcome.

Important notes:

- This collaboration can be considered as a breakthrough in developing workable tools that allow forest protection as well as economic development.
- As the HCS methodology is currently being piloted in Africa with GVL, other scientific experts have been invited to comment on and provide input to the methodology, and the work is still in progress. It is too early to make definitive conclusions, but this example highlights well the depth of the work currently being accomplished in Africa around HCS identification and protection.



03. Taking social factors into account

Local populations are at the heart of the HCS process because they are the ones who have been the primary stewards of the land thus far and who will ultimately conserve or further degrade the areas of forests that are being earmarked for conservation by the HCS methodology.

Beyond taking into account participatory mapping, the HCS methodology still needs to incorporate those key social elements in a better manner than it does today. A recent report from Forest Peoples Programme highlighted the remaining challenges of the industry on the social question. The HCS methodology needs to be incorporated into and respect the results of Free, Prior, Informed Consent (FPIC) processes related to transfers of land use from local people to companies.

We recognise that much improvement is still needed in the HCS process to fully involve local people, and explore how best to align it with FPIC processes. In 2013 the oil palm plantation company New Britain Palm Oil (NBPO) released a Forest Conservation Policy featuring environmental conservation elements as well as social/development factors, and is currently working on an HCS pilot in its concessions in Papua New Guinea.

04. What's next?

Incredible progress has been made on refining the HCS tool over the last 12 months. This is thanks to the tireless collaboration of committed individuals in each organisation involved, who chose to go beyond the usual opposition between companies and NGOs and instead innovate together. Many credible research organisations and expert stakeholders are now inputting in the process in order to refine it and develop the analysis of the viability of the forest patches that are to be conserved. We believe this will be an ongoing process as the tool is rolled out in new regions.

“High Carbon Stock is NOT about setting strict 35 tonnes/ha thresholds, but instead about finding a balance between conservation and development”

Important notes :

Some oil palm growers recently adopted the view that the HCS methodology being developed by some growers jointly with Greenpeace and TFT would be limiting because it would create a 35 tonnes/ha threshold limit to the industry and would therefore hinder the future agricultural development of entire regions of the world. We hope that we have made it clear in the paragraphs above that this is not the case: HCS is NOT about setting strict 35 tonnes/ha thresholds, but instead about finding a balance between conservation and development. We are concerned that some companies may be using the need for “further development” of the HCS process as an excuse to continue clearing, and may try to redefine HCS without meaningful participation from key civil society stakeholders. The alternative process proposed by this group may last years, not months, and meanwhile deforestation will continue.



Incorporating 'No Exploitation' into responsible palm oil policies

Just as there was a need for a practical tool for defining forests in the landscape, the industry is also in need of practical tools for assessing labour practices among suppliers and responsibly addressing cases where forced or child labour is found. This is an area that is in many ways even more challenging than protecting forests, since violations cannot be seen through satellite footage and, if not handled properly, could result in additional risks to people who are already very vulnerable.

TFT recognises that quality tools for both assessing labour conditions in palm oil plantations and responsibly improving practices where called for are urgently needed. Given the prevalence of the problem, innovation is also needed to bring monitoring and addressing of these issues 'to scale'. We have identified this need as a major area for innovation and focus over the coming year and invite experts on the issue to contribute to both development and implementation of tools that can be used by companies, assessors and NGOs.



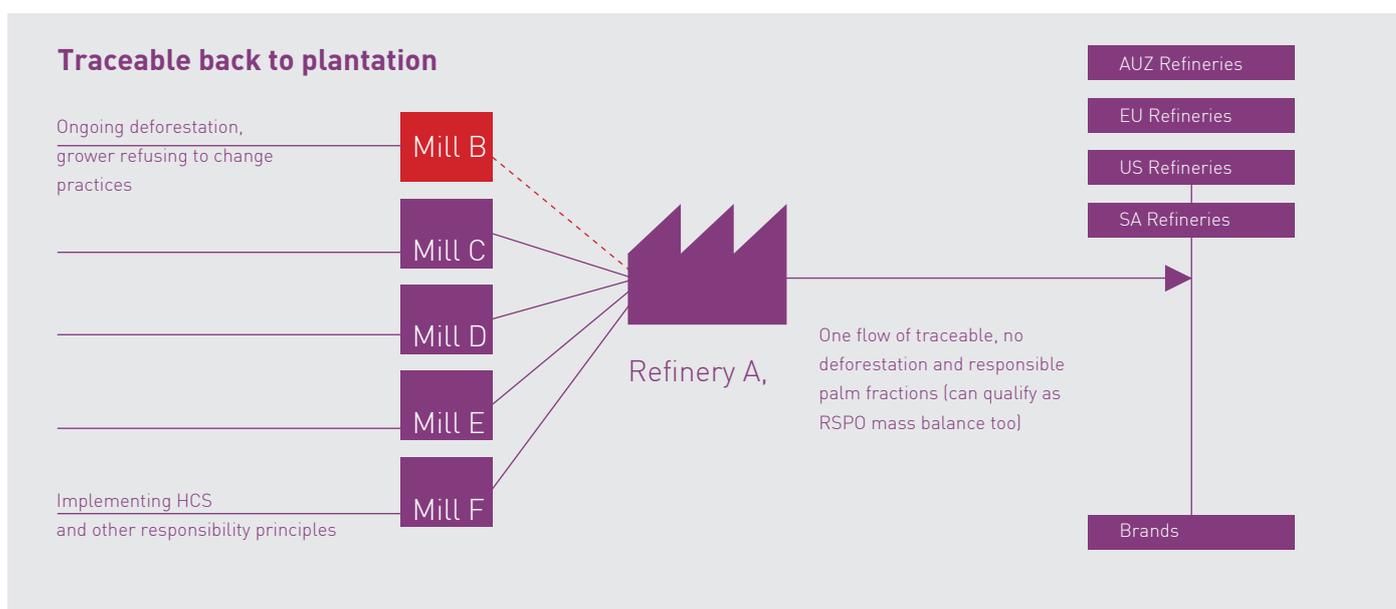
Forest Peoples Programme
'Conflict or Consent?' study



Where does the supply chain and field work need to happen? Developing 'hubs' for traceable / No Deforestation palm oil

As presented in our 2013 paper, we believe that building traceability at refinery and/or port level is the way forward to bring cost effective solutions to the market: it limits segregation costs and while it acknowledges that growers might not be compliant with all responsibility principles, it excludes the worst and most impactful practices like deforestation as a first step. Here is a more detailed view of what this model looks like:

"We foresee a number of refiners/traders' hubs will be in a position to provide traceable / No Deforestation oil to the market by the end of 2014"



In this diagram not all of the 'green' mills are certified, but the refinery is ensuring that the mills are implementing its own No Deforestation or No Exploitation values and those shared with its leading customers. However, the refinery will cut Mill B out of its supply chain unless it makes drastic changes.

By building this kind of supply hub (also called 'supply sheds'), brands and buyers can direct their orders towards those refineries supplying traceable, "moving towards no deforestation" oil and therefore support the progress of willing growers throughout time.

Ongoing reporting of progress against policy goals and a credible verification process are key here to support these solutions on the market (see section below on reporting and verification). Not only will this strategy allow for deforestation to stop quickly, it will also create the space and the market support mechanism for willing refineries and growers to develop and implement the needed changes to reach compliance, with the responsibility principles being asked by the various palm oil users across the world, notably global brands.

With the intensity of the work happening right now in that direction, we foresee a number of refiners/traders' hubs will be in a position to provide traceable / No Deforestation oil to the market by the end of 2014, featuring growers and smallholders that are :

- traceable,
- not expanding into forests, and
- are implementing action plans to put in place responsible practices (HCS, HCV, FPIC, etc)

TFT is developing with its members a data management tool called SURE Technology™ to store information about the supply chain (assessments, supply chain structure, etc.) and allow buyers of palm oil to see where the oil they buy comes from.

Buyers will ultimately use SURE as an information support to make their buying decisions according to the environmental and social quality of the available suppliers or a given type of oil. Therefore, the best players can be supported and encouraged over time in their change journey by gaining market share/access.

Verification and reporting

01. New solutions available for verification of plantation sustainability performance in the field

NGOs have made intensive use of the available satellite data to monitor deforestation and challenge brands publicly with facts. That said, brands have been exclusively relying on the RSPO certification to verify sustainability performance at plantation level. There is currently no certification scheme that can verify all the recently updated brand commitments featuring No Deforestation, peat, etc. Thus there is a need for innovation in the way traceability and the sustainability performance of a plantation company can be verified.

Verification solutions that use satellite images to remotely monitor land use change are also being developed by various organisations. We strongly believe that satellite images processed with the right algorithms can provide an open source, independent verification of the protection of HCS forests.

Many other innovative verification solutions will emerge to fill the current gap. We expect that these kinds of solutions will radically transform the way brands verify the implementation of their policy in the field and hold their suppliers accountable to it.

02. Reporting: transparency or unrealistic targets?

Transforming the palm oil industry does not only depend on a brand's willingness. Many companies committed in recent years to the now infamous '2015 commitments' around palm oil that they now feel they cannot really implement due to lack of availability of price-sensitive RSPO-certified oil in the marketplace. Any time-bound brand commitment actually depends on the speed at which the industry as a whole can transform, and therefore this limits the brand's influence around target dates.

What stakeholders want to know is whether a given company is genuinely trying its best to transform its supply chain and why progress is or is not being made. TFT believes that the best way to address this is for companies to transparently / publicly report about the progress they are making on the implementation of their policy (as Nestlé did, for example, in September 2013, disclosing 45% traceability of its palm oil supply chain), without necessarily making a specific time-bound commitment. In the pulp and paper sector, Asia Pulp and Paper (APP) and TFT developed [a dashboard](#) to update stakeholders about progress in implementing APP's Forest Conservation Policy.

The dashboard provides information on all APP's suppliers in Indonesia, including where they are located, and what is being done to implement APP's Forest Conservation Policy across the supply base. Concerned stakeholders can see how quickly assessments are being performed, any grievances being raised, and how those grievances are being addressed. Although there are few global companies prepared to be this transparent with their stakeholders about their supply chains, we believe that ultimately such transparency provides the strongest form of verification of compliance with a policy.

This attempt to implement radical transparency can be seen to make brands vulnerable, but it actually allows them to restore trust in their willingness to change by demonstrating an unrivalled level of honesty towards their stakeholders. It also pushes them to really act on their supply chain commitments, building traceability and compliance in order to have something concrete to show at the end of the year, rather than waiting for the last day of a five-year commitment to take action. TFT prefers this call for action and transparency, as we are convinced it will stimulate a much deeper and faster change process in the industry.



03. Small note about TFT

Because TFT is pushing for companies to adopt their own policy and not rely on certification schemes to do so, TFT is often been portrayed as willing “to set up its own certification scheme”. We take the opportunity through this paper to stress that it is NOT the case. We are critical of certification schemes because we question their ability to tackle the key environmental and social challenges (deforestation, slave labour) in commodity markets at the scale needed to have a big enough positive impact on the planet. Why would we then want to set up another certification scheme?

We like to see brands and supply chains as a living thing: in the picture below, the tree represents a brand, the fruits are the brand’s products and the roots the brand’s supply chain. For the fruits to be of good quality they need a healthy tree and healthy roots plunged into a fertile soil. The whole system is alive. The soil in particular needs to be alive. It means symbiosis and balance between nutrients, bacteria, microorganisms, fungi.

In the same way, a big global brand will need to make sure that the palm plantations supplying it in Brazil or Indonesia are in symbiosis and good balance with their natural environment (forests, rivers, etc.) and with the various surrounding communities, governments and NGOs. In this case, the balance is not reached in the same way in Brazil or in Indonesia because the natural and social environment (= ‘the soil’) is not the same.



The supply chain ecosystem is alive and therefore welcomes diversity and innovation while it will reject ‘one size fits all’ solutions that don’t allow it to reach the needed balance. In this context, TFT is the earthworm who works to keep the soil ecosystem alive by protecting forests and people and healing situations damaged in the past, thus allowing the balance to naturally emerge in a way that is adapted to each ecosystem.

Conclusion

The changes some brands and their suppliers have adopted over the last 12 months are radical game-changers for the palm oil industry and in responsible sourcing. They feature a high level of innovation in various areas like policy setting, traceability, forest conservation, verification and reporting, and NGO-private sector collaboration, to name just some.

While the palm oil industry has long been criticised for its impact on the environment and on people, some key players are also now demonstrating real leadership on how to deal with sustainability issues in an exemplary way by driving and supporting one of the most innovative processes that has taken place in the agricultural commodity sustainability field over the last few years.

While leading companies (brands, refiners, traders and growers) have jointly been driving that innovation process, other companies – the more conservative ones – have been resisting this change and are still lobbying against it. This is regrettable for the industry as it jeopardises the opportunity to improve the global image of palm oil as a product that benefits people and the world. The resistance by some companies to embrace, support, and contribute to the existing HCS methodology as developed to date through a strong multi-stakeholder process, allows for more deforestation to happen and potentially more outrage to shock consumers around the world.

For TFT it has been fascinating to be part of the change journey that leading companies have embraced, facing the unknown and letting innovation go forth with the confidence from top CEOs that it is the right thing to do. As this process unfolds, there is no doubt it will also deeply influence the way responsible production and trade of other agricultural commodities (cocoa, soy, etc) is handled.

Let’s not forget that companies will ultimately be judged by the change they actually manage to achieve. The context for transformation is set, now it is down to the operational teams in companies, NGOs and governments to make it happen. Success will depend on the ability of the various groups to work together and allow concrete, innovative tools to emerge from their collaboration. This success will be measured by facts over the coming months.

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ABOUT TFT

Established in 1999, TFT is a global non-profit that helps businesses bring responsible products to market. TFT helps more than 90 members worldwide build responsible supply chains by identifying and addressing embedded social and environmental issues. Having established a strong record of achievement in timber supply chains, TFT has in the past five years expanded its work into commodities including palm oil, pulp and paper, cocoa, coconut, leather and stone.

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