



APCO Worldwide in India

After a series of significant policy changes that started in 1991, India today is a trillion-dollar market with an enviable rate of GDP growth. India's economy is fuelled by the combination of a large services sector, a strong and diversified manufacturing base and a significant agricultural sector that continues to provide a framework for the growth of the domestic economy. The country's resilience in weathering the recent global downturn and financial crisis has made governments, policy-makers, economists, corporate houses and fund managers believe that India can play a significant role in the recovery of the global economy in the months and years ahead.

Today, India plays an increasingly important role in global geopolitics – not only as the world's largest democracy, but also as an economic powerhouse that is coming into its own.

APCO WORLDWIDE IN INDIA

APCO has provided counsel to clients in India since 2006. Since that time, we have partnered with a number of prestigious Indian and multinational entities, nonprofit organizations, government bodies and financial institutions to assist in their efforts to build strong strategic communication campaigns, design and implement effective India business strategies, and understand and work within the country's complex public and regulatory affairs environment.

APCO in India is focusing its energies around six key industries, all of which are expected to be vital to the Indian economy in the coming years.

ENERGY AND RENEWABLES

India is the world's sixth-largest electricity-consuming market and the fourth-largest consumer of oil. With the economy currently growing at a GDP of 8.5 percent, India's consumption is steadily rising. However, given that India is largely dependent on imported oil and coal, a conscious strategy was put in place in 2008 to change India's energy consumption patterns. The government is strongly promoting clean and renewable energy sources – including nuclear, hydro, wind, solar, biomass and bio fuels – through its policies and regulatory framework. The opportunities for experienced clean energy companies to bring their expertise to the Indian market are enormous.

The APCO team in India closely tracks policy developments in this highly regulated market, which is undergoing rapid transformation. The team actively advises clients on engaging with government, regulators and prospective partners both in the public and private sectors. Our strategic input and forward-looking counsel helps clients to navigate public interest groups and NGOs and to work with a diverse range of communication tools to convey messages effectively to every audience. Equally, our highly experienced team assists clients with approaching public-sector incumbents to explore partnerships and strategic relationships or to set up operations of their own in the country.

FOOD, CONSUMER PRODUCTS AND RETAIL

Recent studies show that total consumption in India is likely to quadruple by 2025, making it the fifth-largest consumer market in the world. With domestic population in excess of 1.2 billion people, a significant proportion of whom

are under the age of 25, demand for food grains is likely to grow at a significant pace in the foreseeable future.

The food and consumer products team at APCO in India monitors and interprets regulation and policy changes in the external environment and advises clients on policy issues such as the introduction of the general sales tax across states and the direct tax code; proposed reforms to open up the multi-brand retail sector and new channels of distribution; agricultural reform including marketing and post-harvest infrastructure; anti-counterfeiting measures; the growing rise in awareness levels around “healthy eating and healthy living”; and corporate sustainability. The team helps global retailers and food and consumer product companies set up operations in the country on their own or through strategic partnerships and alliances.



INFORMATION AND COMMUNICATIONS TECHNOLOGIES AND ENTERTAINMENT

The information and communications technologies sector has propelled Indian enterprise over the past 20 years. India's IT industry is a global force when it comes to skilled manpower and knowledge assets. In the communications sector, India has been arguably one of the two fastest-growing markets, alongside China, since 1999. Meanwhile, the Indian film industry is considered the most prolific in the world. Enjoying a rich cinematic heritage starting from the silent era, India's media and entertainment marketplace is expected to continue to grow at 13 percent per year.

APCO in India advises its ICTE clients in a diverse range of areas, including government relations; regulatory mapping and regulatory affairs; competition mapping for business strategy; and perception management and positioning, while working closely with the relevant government ministries and regulatory authorities. India's ICTE sector has already seen global interest and, thanks to a steady growth of purchasing power, new opportunities beckon.

BANKING, FINANCIAL SERVICES AND INSURANCE

India has a vibrant Banking, Financial Services and Insurance (BFSI) industry, which contributes 15 percent toward India's annual GDP. According to the Securities and Exchange Board of India, there were at least 1,738 foreign institutional investors registered in India as of October 2010. Of these, a significant number are foreign banks and international financial institutions



that are keen to play an increasingly important role in one of the most promising economies in the world.

The Ministry of Finance, along with the Reserve Bank of India, the country's central bank, is currently considering the introduction of a second wave of financial and banking reforms that is expected to allow a significant number of foreign banks to set up operations in the country and also pave the way for a new generation of Indian private-sector banks. These reforms are expected to usher in a wave of consolidation between banks and financial institutions in the country, as the Reserve Bank strives to strengthen the overall banking system and also to provide a wider range of banking services to consumers living in under-banked and unbanked parts the country.

The insurance sector, guided by the IRDA in India, was opened up to foreign direct investment (FDI) in 2000 and, pending legislation, FDI limits are set to be raised from 26 percent to 49 percent in 2011.

APCO in India is well positioned to advise clients in the areas of regulatory affairs, compliance, executive positioning, strategic communication strategies, internal communication and employee engagement, change communication, financial inclusion and corporate responsibility in the broader BFSI domain with an experienced team in the sector.

INDIA

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HEALTH CARE

Traditionally, the federal government has provided health care in India; however, it has recently signalled its intent to welcome public-private partnerships in building quality health care infrastructure in the country. Rising income levels create increased demand, and the private sector has played a robust role in the growth of the sector in India.

APCO in India works with health care clients to monitor policy and regulation, map stakeholders and provide engagement strategy counsel. One emerging area of development is public-private partnerships with the government – both federal and state – for the provision of health care services. APCO's deep experience in this sector and long history in helping facilitate public-private partnerships provides clients with informed counsel and strategies.

SERVICES TO GOVERNMENTS

APCO in India has a rich history of working with governments and government agencies in India. APCO's team in India provides expert counsel and support, such as:

- Perception analysis to inform and test messaging that builds reputations with key national and international audiences
- Image-building, branding and investment promotion campaigns to generate investment leads and long-term relationships with other national governments, government bodies, chambers of commerce, corporations, academic institutions and nonprofits using a diverse arrange of communication tools
- Preparation of speaking materials, articles, marketing materials, advertisements and web content for global, Indian and inter-state audiences
- High-level strategic counsel from accomplished experts with inside experience of government in established global economies
- Assistance in inter- and intra-department policy and strategy advocacy to create internal government consensus around new economic policies
- Institutional strengthening and capacity-building through dissemination workshops tailored to individual responsibilities and sensitivities
- Integrated political counsel, as well as policy prioritization and rationalization assistance including crisis communication

APCO'S SERVICES IN INDIA

APCO in India provides clients with a full-service, integrated approach and insights at the intersection of business, industry and finance; media, public opinion and society; and government and public policy. With teams located in New Delhi and Mumbai, APCO in India draws on its experienced team locally and internationally to provide expert counsel to clients.



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