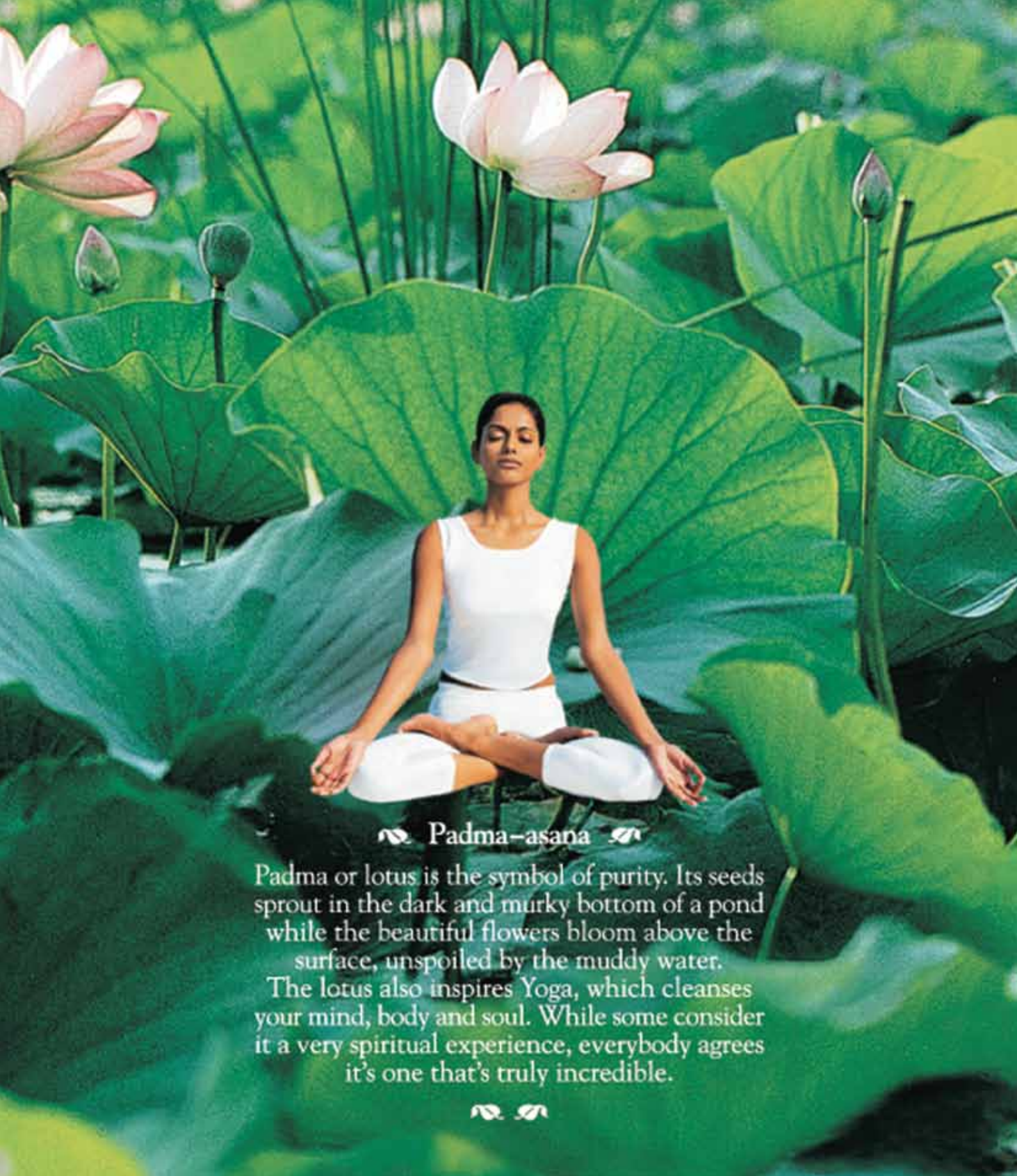




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On the Cover: A visual thinker's rendition of the Digital Sun

Across cultures, the Sun has always been considered the epicenter of knowledge and empowerment. Its diurnal motion, the movement of stars and the cycle of seasons were first seen as proof of a universal order. The motif on the cover represents Surya, the Sun God, one of the oldest yet most coeval of deities, juxtaposed with binary digits as rays - an amalgamation of India's rich spiritual and cultural heritage and her competence and leadership in our digital world.

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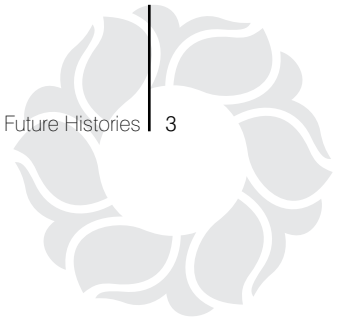
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It was Aryabhata, an Indian astronomer born in 476 AD who proved the importance of zero in algebraic equations and other mathematical processes. Not in his wildest dreams would he have imagined that one of the binary numbers he helped establish, would combine with the other to telling effect, to engineer the digital revolution and change the way we live.

Aryabhata had scripted future history.



Today, as India moves centrestage in a knowledge and idea driven global economy, the digital future is taking shape where it all began. Indian society has blended its traditions and value systems with modernity to create a unique work ethos that is spiralling growth.

India today is a mature, vibrant democracy and a robust pillar of the world economy. Having gained credibility and strength, India has scripted many a decisive chapter on its way to becoming one of the world's fastest growing economies.

Working steadily on all fronts from education, health, business, science & technology to energy and infrastructure, India has achieved holistic growth spanning the entire 'development' spectrum. The economic liberalisation programme that began in the 1990s has ushered in global integration of the Indian economy and given India's industrial competitiveness a sharper edge.

India today plays a multiplicity of roles on the global stage with equal aplomb. A proponent of peace, a credible voice of the developing world, a partner of the developed world, undisputed technology leader across a wide range of products and services, a destination of choice for a large number of foreign investors and transnational corporations.

India is scripting success. And future histories.

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“Freedom is not worth having
if it does not connote freedom to err”
~ Mahatma Gandhi ~

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Ambassador's Message

I am happy to present the publication "**India - Scripting Future Histories**" on the joyous occasion of the 65th anniversary of India's Independence. It also gives me a personal satisfaction to time its release on this momentous day as I begin my innings as Ambassador of India in Indonesia, Timor Leste and ASEAN.

The publication seeks to bring to the readers in Indonesia a snapshot of India's varied sectors, its strengths and the road ahead. The publication has been published in 'Bahasa Indonesia' for the benefit of our Indonesian friends and will be disseminated widely.

This publication also has a separate chapter on 'Educational Opportunities for Indonesians', which gives an overview on the scholarships offered under various schemes.

India and Indonesia have traditionally shared historical and cultural ties. Based on this multi-faceted strong foundation, the ties have now evolved into a strategic partnership encompassing diverse areas. Trade and investment ties between the two countries have been on an upswing despite a global meltdown, and India looks forward to an expansion of economic engagement by bringing in more investment and participation by Indian companies in the development of Indonesia for mutual benefit of our countries.

I would like to thank Sun Media group for bringing out this publication and also the sponsors who supported this initiative.



A handwritten signature in blue ink that reads "Gurjit Singh". The signature is fluid and cursive, with a long horizontal stroke at the end.

Gurjit Singh

Ambassador of Embassy of India, Jakarta

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Vibrant Democracy

India is the world's largest and most vibrant democracy.

A remarkable Constitution, well-developed democratic institutions and true participation by the people in social governance are the hallmarks of this democracy. Faith in the democratic process is nurtured as well as protected by an independent judiciary, an alert and free media and active non-governmental organisations.

The symbols of a vibrant democracy are all around.

India, also known as Bharat, is a union of states. It is a Sovereign Socialist Secular Democratic Republic with a parliamentary system of government. The Republic is governed based on the Constitution of India, which came into force on January 26, 1950.

Democracy in India has survived and flourished over the years because of its all-inclusiveness. India's multi-party democracy is the successful embodiment of this very process. India has held freely contested elections at regular intervals since Independence.

Age-old traditions have dovetailed with the modern concept of democracy. Outsiders have been welcomed and cultural influences seen as enriching; proactive inclusiveness has led to the development of a successful democracy in modern India.

India is a melting pot of cultures, and home to people of all major faiths of the world. Secularism is not only a way of life – it is a philosophy embedded in India's history. Diversity abounds – in geography as well as in culture. In this land of mighty mountains and spectacular deserts washed by the waters of three oceans, a billion people live together - people who speak 18 major languages and a thousand dialects, worship different Gods and celebrate different festivals. They also celebrate unity and their unique Indianness.



Dr. Babasaheb Ambedkar, Chairman of the Constitution Drafting Committee and first Law Minister of India, had said: "Democracy is not merely a form of Government. It is primarily a mode of associated living of conjoint, communicated experience. It is essentially an attitude of respect and reverence towards fellow-men."

Indian Economy

The Indian economy is the third largest in the world in terms of Purchasing Power Parity and the 11th largest by nominal GDP. One of the most attractive investment destinations in the world, India is one of the G-20 major economies and a member of BRICS.

According to the Economic Survey 2011-12, tabled in Parliament on March 16, 2012, by Mr. Pranab Mukherjee, the then Union Finance Minister, the economy is estimated to grow at 6.9% in 2011-12.

The economy is expected to grow at around 7.6% in 2012-13, on the back of higher savings and investment rates, even as most of the Asia-Pacific economies are likely to expand at a slower pace, as per a United Nations (UN) report.

“Today, India is among the most attractive destinations globally, for investments and business and FDI had increased over the last few years,” according to Mrs. Pratibha Patil, former President of India.

A huge increase in the size of the middle class consumer bracket, a large labour force and considerable foreign investments have led to India’s steady and speedy growth over the last few years.

The Government has liberalised investments made by registered foreign institutional investors under the Portfolio Investment Scheme from April 10, 2012. Earlier, these investments required Government approval.





“We are determined to create an environment that would boost investor sentiment and promote an atmosphere conducive to enterprise and creativity. Our policies will be transparent, stable and designed to provide a level playing field to both domestic and foreign investors.”

- Prime Minister Mr. Manmohan Singh, at the G20 Summit 2012 in Los Cabos



The fundamentals of the Indian economy remain strong and the Government has expressed confidence in bringing back the rhythm of high growth of 8-9% per annum.

Highlights of the Indian Economy

Regulatory Mechanisms

Legislation has established regulators in high investment sectors such as insurance, telecommunications and capital markets enhancing public and investor confidence.

Consumer Finance

Access to finance on easy and affordable terms has whetted the appetite of the Indian consumer and also propelled growth across sectors like housing, automobiles and consumer durables.

Foreign Trade

India's total foreign trade has increased over three-fold since 2006 to US\$ 792 billion in FY2012. The present value of exports has grown by 23.5% to US\$ 242.8 billion over April 2011-January 2012. The Government has projected that it is likely to achieve the target of US\$ 500 billion by 2013-14.

Foreign Exchange Reserves

India's foreign exchange reserves have steadily risen over the last decade to US\$ 292.92 billion for the week ending April 6, 2012. Foreign currency assets aggregated to US\$ 258.65 billion and the value of gold reserves stood at US\$ 27.02 billion for the same week.



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Indian consumption expenditure expected to increase 3.6 times by 2020

Total consumption expenditure in India (US\$ billion)					
	2000		2010		2020
Food ¹	135	→ 2.4x →	328	→ 2.7x →	895
Housing and Consumer durable ²	47	→ 4.0x →	186	→ 4.0x →	752
Transport and Communication	43	→ 3.9x →	168	→ 3.9x →	664
Education and Leisure ³	17	→ 4.2x →	71	→ 4.2x →	296
Apparel	18	→ 3.3x →	59	→ 3.8x →	225
Health	14	→ 3.5x →	49	→ 3.8x →	183
Others ⁴	25	→ 5.2x →	129	→ 4.4x →	570
TOTAL	299	→ 3.3x →	991	→ 3.6x →	3,584

1. Includes spend on alcoholic beverages and tobacco (excludes food sold by catering services such as restaurants, hotels, kiosks, etc.)
 2. Includes spend on utilities, home care products, servant salaries, consumer durables, home renovation, rent
 3. Includes spend on internet, entertainment (picnic, eating out, etc.), children education
 4. Includes spend on personal care, baby care, EMI, loan payment, holidays, social gatherings
 Note: All spends in nominal dollars. Years represented as calendar year, 1 USD = 46 INR
 Source: Euromonitor, NSSO, BCG India consumer survey 2010, n=6278, BCG analysis

The Boston Consulting Group



External Debt

At end-December 2011, India's external debt stock was US\$ 334.9 billion, recording an increase of US\$ 28.8 billion (9.4%) over the level of US\$ 306.1 billion at end-March 2011. The rise was owing to higher commercial borrowings and short-term trade credit.

Foreign Investment

FDI inflow rose by 55% to US\$ 28.4 billion during April-February 2011-12, while the cumulative amount of FDI equity inflows from April 2000 to February 2012 stood at US\$ 246.6 billion, according to the latest data released by the Department of Industrial Policy and Promotion.

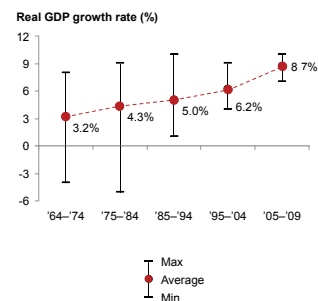
The Government intends to increase India's share in the global FDI space from 1.3% in 2007 to 5% by 2017 by relaxing and un-complicating the FDI regime in the country.

Inflation

Year-on-year inflation in terms of Wholesale Price Index was 7.55% for the month of May 2012 as compared to 9.56% in the corresponding month of last year.

India currently at a threshold of the next wave of growth

Positive trajectory in GDP growth



Source: MOSPI; EIU; BCG analysis.

Indian Industry

Agriculture

India is the second-largest producer of food in the world and holds the potential of being the biggest on global food and agriculture canvas, according to a Corporate Catalyst India (CCI) survey. The food processing industry is one of the largest in India in terms of production, consumption, export and expected growth. The Indian food industry is projected to reach US\$ 300 billion by 2015.

Agriculture, including allied activities, accounted for 14.5% of Gross Domestic Product (GDP) at 2004-05 prices in 2010-11. The sector is critical from the income distribution perspective, as it accounted for about 58% employment in the country, according to Census 2001.

In terms of composition, out of the total share of 14.5% that agriculture and allied sectors had in GDP in 2010-11, agriculture alone accounted for 12.3%, followed by forestry and logging at 1.4% and fishing at 0.7%.

The average annual growth in agriculture and allied sectors realised during the first four years of the 11th Plan Period, i.e. 2007-08 to 2010-11, is 3.5%.



Highlights

- As per the second Advance Estimates, foodgrain production for 2011-12 is estimated at an all-time record level of 250.42 million tonnes (MT), mainly due to growth in the production of rice and wheat.
- Sugar output in India grew 13% in October 2011-March 2012, to touch 23.2 MT as compared to 20.45 MT in the same period last year, according to the Indian Sugar Mills Association (ISMA).
- India is among 15 leading exporters of agricultural products in the world. As per the International Trade Statistics 2011, published by the World Trade Organisation (WTO), India's agricultural exports amounted to US\$ 23.2 billion with a 1.7% share of world trade in agriculture in 2010.
- Exports of agricultural products are expected to cross US\$ 22 billion mark by 2014 and account for 5% of the world's agriculture exports, according to the Agricultural and Processed Food Products Export Development Authority (APEDA).
- The Government has taken many policy initiatives and set up missions to strengthen the farm credit delivery system for providing credit at affordable rates of interest to support the resource requirements of the agricultural sector.
- The Government is also planning to create 30 mega food parks across the country.



Automobiles

The automobile sector of any country reflects the health of its economy. By this virtue, the Indian economy is very much in a good shape as the country's automobile industry has marked impressive growth in the last fiscal.

The overall Indian automobile industry grew by 12.12% in 2011-12 by selling 17.3 million units, majorly driven by demand for two-wheelers and light trucks. Further, the sector witnessed sales growth of 12.46% for the period between April 2011 and February 2012.

The industry has undergone numerous developments and investments recently that have substantially impacted the market dynamics.



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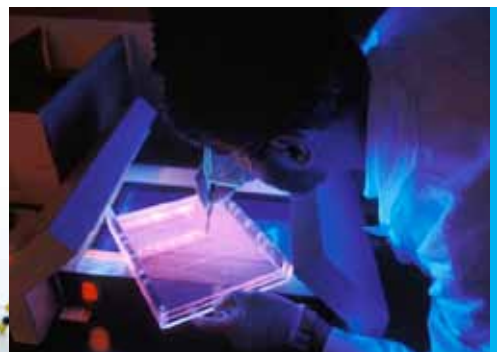
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Highlights

- The cumulative production for April-March 2012 registered a growth of 13.83% over April-March 2011, manufacturing 20,366,432 vehicles during the period.
- As per the 2010-11 data released by the Society of Indian Automobile Manufacturers (SIAM), the Indian domestic vehicle market is dominated by the two-wheelers segment with 76% of the pie. Passenger vehicles, commercial vehicles and three-wheelers account for 16.25%, 4.36% and 3.39% of the market, respectively.
- While passenger vehicle segment grew at 4.66% during April-March 2012, overall commercial vehicle segment registered an expansion of 18.20% year-on-year.
- The industry exported 2,910,055 units registering a growth of 25.44% in April-March 2012. Automobile exports registered a growth of 17.81% in March 2012 as against March 2011.
- Industry body SIAM expects overall automobile sales to grow by 10-12% in 2012-13 on the back of supportive Government policies, launch of new models and intensifying enthusiasm for cars among Indian consumers.



Biotechnology

The Indian biotechnology sector is one of the fastest growing knowledge-based sectors in India and is expected to play a key role in shaping India's rapidly developing economy. With numerous comparative advantages in terms of research and development (R&D) facilities, knowledge, skills, and cost effectiveness, the biotechnology industry in India has immense potential to emerge as a global key player.

The Indian biotech industry grew threefold in five years to report revenues of US\$ 3 billion during 2010-11, a rise of 17% over the previous year, according to the eighth annual survey conducted by the Association of Biotechnology-Led Enterprises (ABLE) and a monthly journal, BioSpectrum.

India has many assets in its strong pool of scientists and engineers, vast institutional network, and cost effective manufacturing. There are over a hundred national research laboratories employing thousands of scientists. There are more than 300 college level educational and training institutes across the country offering degrees and diplomas in biotechnology, bio-informatics and the biological sciences, producing nearly 500,000 students on an annual basis.

India has been ranked among the top 12 biotech destinations worldwide and third largest in the Asia-Pacific region.

Highlights

- The biopharma sector contributed nearly three-fifth to the total industry's revenues at US\$ 1.9 billion, a rise of 12%, followed by bioservices at US\$ 573 million and bioagriculture at US\$ 420.4 million in FY2011.
- The remaining revenue came from the bioindustrials and bioinformatics segments, US\$ 122.5 million and US\$ 50.2 million, respectively. Biopharma and bioservices sectors contributed 63% and 33%, respectively, to the total biotech exports.



- The bioagriculture, bioindustrials and bioinformatics sectors remained focussed on domestic operations, bringing in nearly 90% of their revenues from India.
- While the industry, spanning biopharma and agri-biotech, accounted for US\$ 3 billion, the equipment and ancillary segment contributed around US\$ 1 billion.
- India's biotechnology sector grew 33% in FY2011 and is expected to reach US\$ 10 billion revenue by 2015 from US\$ 3 billion.

Information Technology and IT-enabled Services

Information Technology/IT-enabled services (IT-ITeS) industry has been one of the key driving forces fuelling India's economic growth. As a proportion of national gross domestic product (GDP), IT/ITeS sector's contribution has risen from 1.2% in 1997-98 to an estimated 7.5% in 2011-12.

Information Technology (IT) has evolved as a major contributor to India's GDP and plays a vital role in driving the growth of the economy in terms of employment, export promotion, revenue generation and standards of living. The Indian IT-BPO sector is estimated to aggregate revenues of US\$ 88.1 billion in 2010-2011, with the IT software and services sector (excluding hardware) accounting for US\$ 76.2 billion of revenues.

The IT/ITeS sector has also created tremendous entrepreneurial and job opportunities, generating direct and indirect employment of nearly 2.8 million and around 8.9 million respectively.

The sector includes IT services, engineering design and R&D services, ITES (IT-enabled services) or BPO and hardware.

Highlights

- As per NASSCOM estimates, IT/ITeS sector (excluding hardware) revenues are estimated at US\$ 87.6 billion in FY2011-12. The IT/ITeS industry is expected to grow by 19% during FY2012-13.
- In FY2011, the IT and ITeS industry had the market size of US\$ 76 billion, according to an industry report from NASSCOM and Aranca Research.



- In FY2011, total exports from the IT sector stood at US\$ 59 billion and the industry grew at a CAGR of 16.4% during the five-year period of FY2007-2011 despite the global economic recession in 2008 and 2009.
- Exports from the IT sector accounted for over 57% of the total exports during FY2011. According to management advisory firm Zinnov, adoption of IT services in the Indian SME segment is growing at 15% and is expected to reach US\$ 15 billion by 2015.
- The Government has launched a project to provide high quality broadband access to village Panchayats through National Optical Fibre Network by 2014. The project would benefit small and medium enterprises (SMEs) in the country.
- The market size of the industry is expected to rise to US\$ 225 billion by 2020 considering India's competitive position, growing demand for exports, Government policy support, and increasing global footprint.

Infrastructure

Infrastructure sector in any country holds immense strategic importance and hence enjoys high priority treatment from the administrative bodies as well. In the Indian context, rapid urbanisation and massive Government support has given a makeover to the infrastructure sector. In addition to this, increasing foreign investments and private participation have also given an impetus to the pace of growth.

The sector enjoyed high inflows in terms of foreign direct investment (FDI) over April-December 2011, registering a growth of 23.6% over the previous year.

Infrastructure majorly involves sub-sectors namely roads, railways, ports and power. Recent developments, investments and Government initiatives pertaining to these have been discussed hereafter.



As per the Government projections, Indian infrastructure landscape would attract investments worth Rs 4,900,000 crore (US\$ 1 trillion) during the 12th Plan Period (2012-17), with at least 50% funding from the private sector.

Roads

- India's road network of 4.1 million km is the second largest in the world. With the number of vehicles growing at an average annual pace of 10.16%, Indian roads carry about 65% of freight and 80% of passenger traffic.
- National Highways constitute 1.7% of the entire network but carry 40% of the traffic on Indian roads. To augment it, the Government plans to build 7,300 km of roads every year.

Railways

- Indian Railways have generated Rs 92,985 crore (approx. US\$ 17 billion) of revenue earnings from April 2011 to February 2012 as against Rs 84,402 crore (approx. US\$ 15.11 billion) during the corresponding period last year, registering an increase of 10.17%.
- While total goods earnings increased 10.24% during 2011-2012, total passenger revenue earnings increased by 9.57% in 2011-2012.

Ports

- Indian ports contribute significantly to the country's shipping industry as around 95% of the trade by volume and 68% in terms of value is being transported by sea.
- Endorsing private participation for capacity expansion and technological makeover, the recent Economic Survey 2011-13 has stated that Indian port sector would require investments worth over Rs 150,000 crore (approx. US\$ 29.83 billion) over 2012-17.

Power

- According to the Economic Survey 2011-13, The Indian Power sector registered 9.2% growth in power generation in April-December 2011 as against 4.6% growth in the same period in 2010.



Manufacturing

The Indian manufacturing sector is the mainstay of the entire Indian industry, as manufacturing output constitutes over 75% of the index of industrial production.

India enjoys a competitive advantage on the global canvas owing to key reforms in taxation, infrastructure and clusters (like special economic zones) implemented by the Government, availability of reasonably-priced skilled workforce and a positive economic system.

Moreover, the global trend to manufacture and source products from low-cost countries has gained pace in the past decade, particularly in skill-intensive industries, and India has been able to leverage on the opportunity to its best.

Under the annual budget in 2012, the Indian Government is laying intense focus on developing the manufacturing sector. The Government has set itself a target to ensure that 25% share of gross domestic product (GDP) growth comes from manufacturing by 2022 and eventually creating 100 million job opportunities to make the growth inclusive.

The Government has announced a slew of incentives for the sector in June 2012 worth over Rs 1,000 crore (approx. US\$ 200 million).



Highlights

- HSBC India Manufacturing Purchasing Managers' Index – a measure of factory production – was at 54.8 in May 2012. With output, quantity of purchases and employment expanding at a faster pace, activity in the manufacturing sector kept up the pace in May. New orders increased slightly, led by Indian manufacturers.
- The Indian manufacturing sector also showed moderate overall business sentiment in October-December 2011 quarter, as per the Industrial Outlook Survey conducted by the Reserve Bank of India (RBI) for the quarter.
- The business expectation index, which acts as a barometer of the overall health of the manufacturing sector, increased from 110.3 in October-December 2011 to 114.9 in the assessment quarter.
- The index for industrial production (IIP) expanded by 0.1% in April 2012 driven by growth in consumer goods that increased by 5.2%. In terms of industries, 12 of the 22 industry groups in the manufacturing sector have shown positive growth during April 2012 as compared to the same month a year ago.



Oil and Gas

Riding on a growing economy, India is a significant consumer of oil and natural gas. The country is Asia's third-largest oil consumer and world's fifth largest energy consumer.

According to the International Energy Agency (IEA), hydrocarbons account for the majority of India's energy consumption while coal and oil satisfy about two-thirds of the same. Natural gas accounts for 7% share, which is expected to increase with the discovery of new gas deposits.

The petroleum and natural gas industry in India has attracted foreign direct investment (FDI) worth US\$ 3, 338.75 million from April 2000 to March 2012, according to the data provided by The Department of Industrial Policy and Promotion (DIPP).

Mr. S. Jaipal Reddy, Union Minister for Petroleum and Natural Gas, India, expects investments worth US\$ 75 billion in South Asian nation's oil and gas sector from April 2012 to March 2017, as the country is ramping up its exploration, production, refining, marketing, storage, petrochemicals and related engineering activities to increase availability of petroleum and petroleum products. Eventually, the development plan will also cut India's import bill.

Highlights

Oil & Gas

- According to the provisional production data released by the Ministry of Petroleum and Natural Gas in a press release, crude oil production was recorded at 3.144 million metric tonnes (MMT) for April 2012; natural gas production was 3,632.7 million cubic metres (MCM) for April 2012; and during April 2012, 13.614 MMT of crude oil was refined.
- Natural Gas production was 40,156.7 million cubic metres (MCM) during April-January 2011
- During April-January 2012, 140.73 MMT of crude oil was refined, compared to 136.49 MMT of oil refined during corresponding period in 2011.
- According to Business Monitor International (BMI)'s India Oil and Gas Report for second quarter of 2012, India's average oil and liquids production for 2011 is estimated at 939, 000 barrels per day (B/D) which will touch the peak production at 1.06 million B/D in 2015.



Diesel & Petrol

- Around 40% of fuel consumption in India is satisfied by diesel. According to IEA, there would be an increase in India's fuel demand by 3.8% which would be majorly accounted by diesel and petrol (gasoline).
- IEA expects diesel's demand to have increased to 1.37 million b/d in 2011 (rising by 5.8%) and further it projects an increment of 5.5% in 2012 at around 1.44 million b/d.
- Demand for petrol is expected to have expanded by 7.6% (363,000 B/D) in 2011 and is projected to increase by another 6.7% (388,000 B/D) in 2012.
- The Ministry of Petroleum anticipates a growth of 4.6% in the sale of oil products in the FY12.

Gas

- Development of gas-fuelled power stations in India is boosting the demand for gas in the country. BMI states that gas consumption in India has increased by more than 160% since 1995 while average annual demand would grow by 6% over next few years.
- Gas production is estimated at 52 BCM in 2011, while total gas consumption is predicted at 92 BCM in 2016 from an estimated 68 BCM in 2011 by BMI.



Pharmaceuticals

India's pharmaceutical sector is gaining its position as a global leader. The pharma market in India is expected to touch US\$ 74 billion in sales by 2020 from the current US\$ 11 billion, according to a PricewaterhouseCooper (PwC) report.

In fact, India has every chance to capitalise the opportunity to become a pharmaceutical superpower in 2020 and a hub for all pharmaceutical manufacturing & research needs, according to Subodh Priolkar, President, 63rd IPC, and Regional Managing Director, Colorcon Asia.

The Ministry of Commerce has proposed an ambitious plan to double pharmaceutical exports from US\$ 10.4 billion in 2009-10 to US\$ 25 billion by 2013-14. The Government has also planned a 'Pharma India' brand promotion action plan spanning over a three-year period to give an impetus to generic exports.

India will see the largest number of merger and acquisitions in the pharmaceutical and healthcare sector, according to consulting firm Grant Thornton.

Highlights

- The domestic pharmaceutical market (IPM) grew 21.9% to record sales of Rs 5,369 crore (approx. US\$ 1.01 billion) in March 2012, as compared to the previous year, according to market research firm, All India Organisation of Chemists and Druggists (AIOCD) AWACS. Exceptional growth in companies such as Mankind, Macleods and Micro Labs resulted in the record sales.

- The drugs and pharmaceuticals sector attracted foreign direct investments (FDI) worth US\$ 9,173.50 million between April 2000 to February 2012, according to the latest data published by Department of Industrial Policy and Promotion (DIPP).
- India tops the world in exporting generic medicines worth US\$ 11 billion. Indian generics constitute nearly a fifth of global supplies, as per a press release dated December 28, 2011.
- Generics will continue to dominate the market while patent-protected products are likely to constitute 10% of the pie till 2015, according to McKinsey report 'India Pharma 2015 - Unlocking the Potential of Indian Pharmaceuticals Market'.



- The value of the Indian medical devices market is estimated at US\$ 4 billion, and is clocking a growth rate of 15% annually.

Science and Technology

India is among the top-ranking countries in the field of basic research. Indian Science is one of the most powerful segments for growth and development, especially in the emerging scenario and competitive economy.

Research and development (R&D) is an inseparable part of science and technology, with India fast emerging as the global R&D hub. Presence of world class institutions, a robust intellectual property regime and a rich talent pool of technical manpower available at a very competitive cost are major factors that are making India a viable destination for global researchers.

India is emerging in industrial research and development, space, defence, oceanography, and atomic energy. However, India is strong in software technology and computer science.

The year 2011-12 is a landmark year for the Department of Science & Technology, as it marked the completion of 40 years of service by the department.

Highlights

- With an annual growth of over 12% in the number of scientific publications in Science Citation Indexed (SCI) journals during the last three years, India posted a significant improvement in its global ranking.

- India has been ranked as the third best investment destination in renewable energy sector, next only to China and the US, as per a recent report by Ernst & Young (E&Y).
- India's first indigenous all-weather Radar Imaging Satellite (Risat-1) was launched successfully on board the Polar Satellite Launch Vehicle (PSLV)-C19 from Sriharikota in Andhra Pradesh, on April 26, 2012. Its images will facilitate agriculture and disaster management.
- India ranks first in the global Engineering Research and Development and Design outsourcing industry with a 22% share in the revenue, as per a study by NASSCOM.
- The ER&D market for such services is estimated to touch US\$ 40 billion by 2020. The study further revealed that ER&D currently contributes 15% of the US\$ 60 billion strong Indian IT-BPO export industry wherein over 400 service providers generate revenue of about US\$ 9 billion-US\$ 10 billion.

Telecommunications

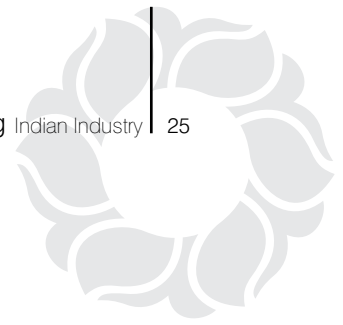
Third largest in the world and the second largest among the emerging economies of Asia, the Indian Telecommunication network has proved its mettle time and again. Public as well as private segments of the economy have made significant contributions to make the sector one of the key contributors to India's success story.



The growth of Indian telecommunication sector is highly driven by supportive government policies, emerging new technologies and changing consumer behaviour. The fact that the industry has made stupendous growth in recent times is reflected in the statistics, key developments, investments and future prospects pertaining to it are discussed hereafter.

Highlights

- In its recent statement issued, Telecom Regulatory Authority of India (TRAI) has revealed that the country's mobile subscriber base has increased from 893.84 million in December 2011 to 903.73 million in January 2012, growing by 1.11%.
- Telecom operators added 9.88 million mobile subscribers in January 2012, taking the total telephone user base to 936.12 million; the overall tele-density (telephones per 100 people) reached 77.57%.
- Broadband subscriber base increased from 13.30 million at the end of December 2011 to 13.42 million at the end of January 2012



- The Indian handset market has registered 14.1% growth in 2011 marking a volume sale of 182 million handsets.
- A report by CyberMedia Research (CMR) reveals that there were 10 million units of smartphones shipments over January-November 2011. The report also stated that there were 23 smartphone model launches in the month of November itself.
- The Cabinet has given its nod to National telecom Policy 2012. The policy directs new initiatives, which includes free roaming, unrestricted Net telephony and a new unified licensing regime for operators. The policy also endorses a boost to broadband expansion and an increase in local manufacturing of telecom equipment.

Tourism and Hospitality

The hospitality sector in India is witnessing stable occupancy levels and steady increase in demand from domestic travellers. A steady rise in domestic tourist spending has also brought cheer to the industry with a 13.7% compound annual growth rate from 2010 to 2012, according to a report by World Travel and Tourism Council.

India had 740 million domestic travellers across segments in 2011 and the figure is expected to increase in the years to come. Younger demographics of the travellers and their changing preferences have also resulted in creating many opportunities for the hospitality sector.



Highlights

- In India, the tourism sector has witnessed significant growth in recent years. During the period 2006 to 2011, the Compound Annual Growth Rates (CAGRs) of foreign tourist arrivals (FTA) and foreign exchange earnings (FEE) from tourism (in rupee terms) were 7.2% and 14.7%, respectively.
- FTAs during the period January-February 2012 were 13,59,000 with a growth of 7.9% as compared to the FTAs of 12,59,000 with a growth of 12.4% during January-February 2011 over the corresponding period of 2010.
- FEE during the month of February 2012 were Rs 8,502 crore (approx. US\$ 1.58 billion) as compared to Rs 7,653 crore (approx. US\$ 1.42 billion) in February 2011 and Rs 6,646 crore (approx. US\$ 1.23 billion) in February 2010.
- With well-equipped infrastructure and the low cost compared to developed countries has paved India's way to be a nation growing fast to gain the status of one of the most preferred tourist destinations in the world.

Social Development

Education & Literacy

With a growth rate of 10 to 15% expected over the next decade, the Indian education market has witnessed a series of developments and changes in the last few years, which has resulted in a significant increase in the market size of the education industry compared to previous years.

With a combined market size of US\$ 50 billion per annum with more than 450 million students, and investment requirement of approximately US\$ 100 billion by 2014 to meet growing demands of the sector, education industry is one of the largest service sector industries in India.

The Government of India has allowed foreign direct Investment (FDI) up to 100% through the automatic route in the education sector.

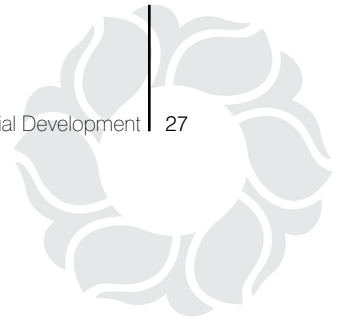
According to data released by the DIPP, the education sector has attracted FDI worth Rs 2,306.13 crore (approx. US\$ 403.49 million) between April 2000 and January 2012.

Government Initiatives

Education

- For the year 2012-13, Rs 25,555 crore (approx. US\$ 4.98 billion) have been allotted for RTE-SSA (Right to Education - Sarva Shiksha Abhiyan) which represents an increase of 21.7% over the previous year allotment in 2011-12.





- 6,000 schools have been proposed to be set up at block level as model schools in the 12th Five Year Plan (2012-17).
- Rs 3,124 crore (approx. US\$ 560 million) have been provided for the RMSA (Rashtriya Madhyamik Shiksha Abhiyan), which is an increase of 29% over BE 2011-12.
- In order to ensure a better flow of credit to students, a Credit Guarantee Fund has been proposed.

Skill Development

- National Skill Development Corporation has approved projects that are expected to train 62 million people at the end of 10 years.
- The National Skill Development Fund has been allocated Rs 1,000 crore (approx. US\$ 180 million) for the period 2012-13.
- To improve the flow of institutional credit for skill development, a separate Credit Guarantee Fund will be set up.
- “Himayat” scheme introduced in Jammu and Kashmir (J&K) to provide skill training to 100,000 youth during the next 5 years and the entire cost will be borne by the Government of India.



Healthcare

India is one of the world's most lucrative healthcare markets, and is expanding rapidly, according to latest findings by a report published in February 2012, by market research firm RNCOS. India is the most competitive destination with advantages of lower cost and sophisticated treatments, according to RNCOS report titled 'Indian Healthcare - New Avenues for Growth'.

The Indian healthcare industry estimated at US\$ 40 billion in 2010 is expected to reach US\$ 280 billion by 2020.

The report further highlighted that several key trends are backing the growth of India's healthcare sector. Of these, medical city is relatively a new concept that offers immense growth opportunities. Likewise, there is a huge potential for day-care surgeries. Almost 60% of all surgeries can be done in a daycare mode with the current infrastructure support.

The Government has decided to increase health expenditure to 2.5% of the gross domestic product (GDP) by the end of the 12th Five Year Plan, from the current 1.4%. A 100% foreign direct investment (FDI) is permitted for health and medical services under the automatic route.

Highlights

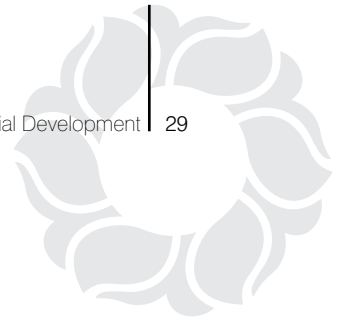
- The hospital services market represents one of the most lucrative segments of the Indian healthcare industry. On the back of continuously rising demand, the hospital services industry is expected to be worth US\$ 81.2 billion by 2015.
- The hospital and diagnostic centre market in India has attracted foreign direct investment (FDI) worth US\$ 1,183.04 million, while drugs & pharmaceutical and medical & surgical appliances industry registered FDI worth US\$ 9,170.24 million and US\$ 514.08 million respectively, during April 2000 to January 2012, according to the data provided by the DIPP.
- According to industry estimates, the market size of medical tourism in India is growing at over 25% annually at more than US\$ 2.5 billion.



- Allocation for National Rural Health Mission (NHRM) has proposed to be increased from Rs 18,115 crore (approx. US\$ 3.23 billion) in 2011-12 to Rs 20,822 crore (approx. US\$ 3.72 billion) in 2012-13
- National Urban Health Mission is being launched.
- Pradhan Mantri Swasthya Suraksha Yojana being expanded to cover upgradation of seven more Government medical colleges.

Health and Nutrition

- Proposal to extend concessional basic customs duty of 5% with full exemption from excise duty/CVD to 6 specified life saving drugs/vaccines
- Basic customs duty and excise duty reduced on soya products to address protein deficiency among women and children
- Basic customs duty and excise duty reduced on iodine
- Basic customs duty reduced on probiotics



Media and Entertainment

The Indian Media & Entertainment (M&E) industry is highly driven by strong consumption in non-metro and small cities, intense emergence of regional media and burgeoning new media businesses and formats.

According to a report jointly prepared by KPMG and an industry body, the industry registered a growth of 12% in 2011 over 2010. While television (TV) retains its top slot as an entertainment medium, segments such as animation, VFX, digital media and gaming are up-coming major mediums.

Multiple movies crossed Rs 100 crore (approx. US\$ 20.04 million) business in domestic theatrical collections and Rs 30 crore (approx. US\$ 6 million) mark in Cable & Satellite (C&S) rights.

Advertising spends across all media accounted for 41% of the overall M&E industry revenues, aggregating to Rs 300 billion (approx. US\$ 6 billion) while advertising revenues witnessed a growth of 13% in 2011.



Highlights

- TV accounted for Rs 329 billion (approx. US\$ 6.6 billion) of revenues in overall M&E industry in 2011 and is estimated to grow at a CAGR of 17% over 2011-16 to touch Rs 735 billion (approx. US\$ 14.73 billion) in 2016.
- As per the report (by KPMG and another industry body), television would account for almost half of the Indian M&E industry revenue and would also be over twice the size of print media (the second largest media sector) by 2015.
- The radio industry in India has around 36 FM radio operators and is estimated at Rs 1,200 crore (approx. US\$ 240.46 million).
- Internet retailing companies are getting attracted towards Indian markets which are poised to grow leaps-and-bounds in the years to come. There are about 17 million online shoppers in India and the number is projected to grow over three times in the years ahead.

- According to a recent finding, 72% of all mobile Internet users in India use their cell-phones as their 'exclusive or primary' instrument to access the web.
- Rising literacy levels and low print media penetration offer significant potential for growth in Indian newspaper industry. Growing regional markets are driving the pace of print media that registered a growth of 10% in 2010 and is expected to follow the similar pace till 2015.

Poverty Alleviation

The Government of India has taken up number of measures in post-economic reform era to reduce the country's poverty levels. Poverty levels in India have dropped sharply from 37.2% to 29.8% from 2004-2005 to 2009-2010 (Planning Commission of India). According to the Planning Commission, rural poverty fell by 8%, compared to urban poverty which declined by 4.8%.



The programmes are broadly classified into: (i) self-employment programmes; (ii) wage employment programmes; (iii) food security programmes; (iv) social security programmes; and (v) urban poverty alleviation programmes.

- **Swarnjayanti Gram Swarozgar Yojana:** The SGSY is a holistic programme of micro enterprise development in rural areas with emphasis on organising the rural poor into self-help groups, capacity-building, planning of activity clusters, infrastructure support, technology, credit and marketing linkages. The programme is credit driven and subsidy is back-ended.
- **Swarna Jayanti Shahari Rozgar Yojana:** The scheme strives to provide gainful employment to the urban unemployed and under-employed poor by promoting self employment ventures, skills training and also by utilizing their labour for construction of socially and economically useful public assets.
- **Jawahar Gram Samridhi Yojana:** The objective of JGSY is to create demand-driven community village infrastructure including durable assets at the village level and assets to enable the rural poor to increase the opportunities for sustained employment.
- **Employment Assurance Scheme:** The scheme is open to all rural blocks situated in drought prone, desert, tribal and hill areas. The

primary objective is creation of additional wage employment opportunities during the period of acute shortage of wage employment through manual work for the rural poor living below the poverty line.

- **National Social Assistance Programme:** The objective of the scheme is to provide social assistance benefit to poor households in the case of old age, death of primary breadwinner and maternity.
- **Annapurna:** The scheme provides food security to those indigent senior citizens who are not covered under the Targeted Public Distribution System (TPDS) and who have no income of their own and none to take care of them in the village.
- **Indira Awaas Yojana:** The scheme is a cash subsidy based programme, under which assistance is provided to rural BPL families for constructing dwelling units on their own using their own design and technology.



Women's Empowerment

The Ministry of Women and Child Development, as the nodal agency for all matters pertaining to welfare, development and empowerment of women, has evolved schemes and programmes for their benefit. These schemes are spread across a broader spectrum such as women's need for shelter, security, safety, legal aid, justice, information, maternal health, food, nutrition etc as well as their need for economic sustenance through skill development, education, and access to credit and marketing.

- **Economic Empowerment:** Schemes to ensure provision of training, employment and income-generation activities with both 'forward' and 'backward' linkages with the ultimate objective of making all potential women economically independent and self-reliant.
- **STEP:** The government has allotted Rs 240 crore (approx. US\$ 43.3 million) in the 11th Plan for providing provide skills and new knowledge to poor and assetless women in the traditional sectors.

- The Ministry has set up a Gender Budgeting Cell as a tool for achieving the goals laid down for women in our plans and policies, and to assess the benefits reaching women through the existing programmes.
- **Self Help Groups:** Today there are seven million Self Help Groups in the country. Nearly 90% of the groups are women only groups. SHGs have been viewed by the State as a strategy for both women's empowerment as well as poverty reduction.



- The Rashtriya Mahila Kosh scheme provides micro-credit to the poor women for income generating, production, skill development and housing activities in order to make them economically independent.

Educational and Scholarship Opportunities in India

For higher education in India, there are 504 Universities — 40 central universities, 296 state universities, 130 deemed universities, 33 institutions of national importance and five institutes established under State Legislations — apart from around 25,951 colleges imparting studies in various disciplines at vocational diploma, under-graduate, post-graduate and doctoral levels.

There are 249 institutes of open and distance learning, out of which 176 institutes are currently offering distance education programmes. Vocational education at certificate-level is offered by over 1,500 vocational institutions in the country in diverse fields of study. There are also thousands of private colleges, business schools and institutes of engineering.

With all these, India has one of the largest higher education systems in the world providing quality higher education to its people as well as to students and scholars from countries all over the world.

Educational opportunities for Indonesians

- Higher education starts after 12 years of schooling in India which is equal to SMA/SMU of Indonesia.
- During the last five years more than 800 students have gone to India for studies under various schemes.

- Various universities/higher educational institutions have courses for foreign nationals in natural science and social science.
- Indonesian students are offered every year seats in undergraduate medical and engineering courses in India under the Self-Financing Scheme for Foreign Students to pursue MBBS/BE/B.Pharma etc.
- Education Consultants of India Ltd (EdCIL) along with a number of Indian universities visited Indonesia in 2009 and 2010 for propagation of Indian higher education system in Indonesia.



Scholarship schemes of the Government of India for Indonesia

- The Government of India provides 20 scholarships every year under General Cultural Scholarship Scheme (GCSS) for undergraduate, postgraduate, doctoral and post-doctoral courses in 260 participating universities and educational institutes all over India.
- Two scholarships are awarded every year for pursuing post graduate studies in India under the IOR-ARC Scholarship Scheme.
- AYUSH (Ayurveda, Unani, Siddha and Homeopathy) Scholarship in undergraduate and post graduate courses is being offered to Indonesian students from 2011-12. It is awarded to pursue courses in Indian system of medicine (i.e. Ayurveda, Unani, Siddha) and homeopathy at premier institutions in India.
- Two scholarships are awarded by Hindi Sangsthan Agra for studying Hindi language. Since 2001-2002, 15 students have availed of this scholarship.



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Training under ITEC and TCS of Colombo Plan

- Under the Indian Technical and Economic Cooperation (ITEC) Programme and Technical Cooperation Scheme (TCS) of Colombo Plan of the Government of India, officials working in Public and Private sectors are provided training in Government and private institutions in India.
- Under the Scheme, trainees are provided airfare, course fee, boarding, lodging and miscellaneous grant.
- More than 100 slots are allocated to Indonesia every year under the ITEC and Colombo Plan Schemes.
- More than 1,500 Indonesians have attended training programmes in India under these schemes during the last decade.

Indian Culture

India's cultural history goes back by over 4,500 years. Indian culture is the amalgamation of the country's diverse languages, religions, food, architecture, arts, music and dances that differ from region to region. Many historians believe that the Indian culture is the oldest living civilisation in the world today.

During the Vedic Period (c. 1700-500 BC), the earliest known records to man, the Vedas, detailed the basics of Hinduism.



Highlights

- India is known for its religious and cultural diversity. The five major religions practiced in the country are Hinduism, Islam, Christianity, Jainism and Sikhism.
- India has over 1,600 languages and dialects, of which 22 are officially listed. Hindi is spoken by about 40% of the population and covers most of the northern states. Nearly one-fourth of all Indians speak languages belonging to the Dravidian family, among which Kannada, Malayalam, Tamil, and Telugu have official status.
- The two basic styles of Indian classical music are the northern Hindustani style and southern Carnatic style. Apart from these, there is a rich variety of folk, devotional, seasonal and regional music, and also the modern form of film music.

- Dance forms in India relate to the different festivals and social functions such as marriage and rituals. Classical dance forms in India include Bharatnatyam from Tamil Nadu and South India, Kuchipudi from Andhra Pradesh, Odissi from Orissa, Kathakali from Kerala, Kathak from northern India and Manipuri from the north-eastern state of Manipur.
- The earliest known texts are the Vedas and the Upanishads. The Mahabharata and the Ramayana, both written several centuries before the dawn of the Christian era, are the next in importance. Other major works include Shankuntala, Nala-Damayanti, Panchatantra, all of which were written in Sanskrit.
- Today, Indian literature has undergone a renaissance with the rise of nationalist writers writing in vernacular languages. Famous writers in modern day India include Ruskin Bond, VS Naipaul, Nirad Chaudhari, RK Narayan, Khushwant Singh, Vikram Seth and Salman Rushdie among others.
- Each of India's myriad art forms was born and nurtured in its local context. Each, however, has its own story to tell of how it travelled down the ages, always seeking to dialogue with cultures beyond its own.



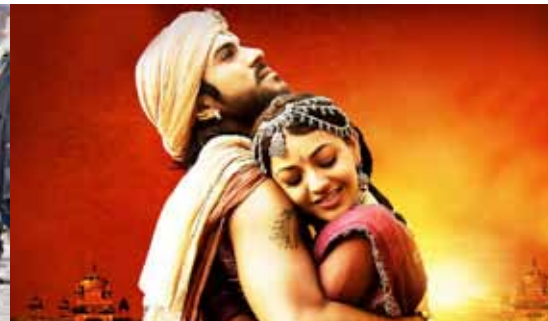
Indian Cinema

Indian cinema has completed 100 years since its first feature film 'Raja Harishchandra' in 1913 by Dadasaheb Phalke. Bollywood, as the Hindi-language film industry is popularly known, is the largest film producer in India and one of the largest centres of film production in the world.

The Indian film industry is anticipated to grow at a CAGR of 10.1% to touch Rs 150 billion (approx. US\$ 2.63 billion) by 2016. The industry is estimated to have garnered revenues of around Rs 93 billion (approx. US\$ 1.63 billion) in 2011, reflecting a growth of 11.5% vis-à-vis 2010.

Bollywood releases approximately 1,000 films each year, the most in the world. Bollywood films are multi-million dollar productions, with the most expensive productions costing up to Rs 100 crore (approx. US\$ 20 million).

- The uniqueness of Indian cinema lies in the existence of not one, but several highly successful film industries within one country. The wealthiest among them in terms of budgets and earnings are Hindi, Tamil and Telugu language industries, popularly known as Bollywood, Kollywood, and Tollywood respectively. Films are also made in Malayalam, Bengali, Marathi, Kannada, Bhojpuri, Punjabi and many other languages.
- The period from the late 1940s to the 1960s is regarded by film historians as the “Golden Age” of Hindi cinema when films like ‘Pyasa’, ‘Awaara’, and ‘Shree 420’ were made. The most successful Hindi film till date is Aamir Khan-Kareena Kapoor starrer ‘3 Idiots’ (2009) with worldwide net collections over Rs. 2.02 billion (approx. US\$ 36.17 million) (Box Office India).



- Uninfluenced by world trends, Indian cinema has an identity of its own, with music playing a big part. Bollywood songs are generally pre-recorded by professional playback singers, with the actors then lip syncing the words to the song on-screen, often while dancing. These film songs have become an integral part of India’s music culture today.

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SOURCES

Principal Source: Indian Brand Equity Foundation (IBEF): India Brand Equity Foundation is a Trust established by the Ministry of Commerce with the Confederation of Indian Industry (CII) as its associate. IBEF’s primary objective is to promote and create international awareness of the ‘Made in India’ label in markets overseas and to facilitate the dissemination of knowledge of Indian products and services. Visit the IBEF website at www.ibef.org

Other Sources: The Economic Survey report 2011-2012: The annual Economic Survey is the Finance Ministry’s view of the country’s economic development in the previous year which is tabled in the Parliament before the Union Budget. The Survey report gives a gist of the development of all sectors, performances of the various programmes and the policy initiatives of the government.

The Ministry of Commerce and Industry: The Ministry website for latest data on the country’s imports and exports, foreign trade, and performances by the various industries

The Ministry of Finance: The Ministry website for figures and details on the various aspects of the Indian economy

The Ministry of Women and Child Development: The Ministry website for latest data and details on the initiatives

The Planning Commission of India: The Planning Commission is responsible assessing all resources of the country, augmenting deficient resources, formulating plans for the most effective and balanced utilisation of resources and determining priorities.



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