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NASSCOM® INDIA LEADERSHIP FORUM 2013 NEWSLETTER

FEBRUARY 13-15, GRAND HYATT, MUMBAI

DAY-1

NILF 2013 Nasscom leaders share their thoughts



Som Mittal
President

"We are looking forward to hosting the 21st edition of the NASSCOM India Leadership Forum, where, like every year, thought leaders from across different walks of life will share valuable insights and renewed pursuits."



Ameet Nivsarkar
Vice President
Global Trade
Development

"In 2013, NASSCOM has brought together over 1500 delegates, 30 countries, and more than 150 speakers under one roof to debate on one theme: Imagineering the Future: Disruptive Innovation for Sensible Growth. We look forward to intensive discussions with various business leaders."



Sangeeta Gupta
Sr Vice President

"The NASSCOM India Leadership Forum in 2013 will focus on hardcore discussions on the immediate future, re-invention of business models, and newer forms of technology that have reshaped traditional business"

How quickly can you innovate?

The real question at the heart of the business transformation debate is not how much money or resources you spend on coming up with new products or ideas - but how quickly can you innovate around your innovation process. Business leaders today are under incredible pressure to perform against the backdrop of uncertain markets, changing patterns of customer behaviour as well as disruptive technologies. Frankly that calls for an entirely new type of enterprise - one that is flexible, adaptable, and natural born for the 21st century.



Mike Walsh, Futurist & Author, Keynote Speaker at NILF 2013

Big Data

It's easy to get seduced by the idea of Big Data. Data alone - well, that's dull conversation fare. But throw in some hype, an adjective and a little capitalization, and you have this year's big strategic topic. All that aside, there is one thing about this debate that makes it more important than the usual industry fad. Big Data is about Big Business, not just high tech startups. Traditional companies are hoping that by leveraging massive data sets and real time prediction models - that they can start making realtime decisions just like a Facebook, Google or an Amazon.

Social Media

From Mexico to Brazil-social media use in Latin America has exploded-but what is really behind the propensity of users in these countries to embrace

social platforms? One of the most interesting things about looking at the rise of digital platforms in emerging markets are the intersections between disruptive technologies and local ethnography.

Technology

Understanding the future of technology used to be a simple science. You kept an eye on scientific journals, visited the odd corporate R&D lab, and kept a close watch on the price/performance curves that indicated the falling price of computation. These days, unfortunately, the greatest source of disruptive innovation often comes from consumers themselves - which is why some of the world's largest companies are investing in specialist research divisions run by savvy anthropologists.

Read more at www.mike-walsh.com

Mike Walsh should be delivering his keynote at 10.30 am at the Grand Ball room.

Mike is reputed to engage his audience with a blend of first hand stories, global case studies and cutting edge research into consumer and technology trends.



Watch out for



- 1 **Inauguration & Social Innovation Honors**
- 2 **Session I:** Spotlight Keynote-Imagineering: Seeding the field of the Future!
- 3 **Session II:** Reality Check-Is India suffering from tall ambition & dwarf execution?
- 4 **Session III:** Power Discussion-Indo-US ties: Oversold or defining relationship of the 21st century!
- 5 **Session V:** In conversation Cross Border Leadership: Maneuvering fragile differences!
- 6 **Session VII:** Legend in Conversation-Reinvention of Self: The Real Comeback!
- 7 Global Leadership Awards night

Detailed Agenda: Page 4

My Business



A phone system that understands criticality automatically!

Small and medium businesses face fierce competition from organizations thrice their size. Apart from which they need to plan from a choice of limited resources. It's to survive and thrive in these environments that Avaya launched a compact range of business communication solutions with the SMB segment in mind.

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Simple functions for an efficient business with Avaya IP Office

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Easy, low-cost conference calls, up to 64 parties per conference anytime.

CALL ROUTING

Client calls on desk phone, can be answered on the mobile hereafter.

DOOR PHONE CONNECTIVITY

Now forward any number of connectivity when not in the office.

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TOLL RESTRICTION

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Smart Call Routing - You handle more calls with fewer people

Internet Protocol (IP) technology directs calls through the system and over broadband links - drastically reducing mobile and long distance phone bills

One number reachability allows your customers to call a fixed line and be connected to your employees mobile device at all times



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Editor's Note Encouraging Outlook

Ed Nair

The author is Editor of Dataquest & Global Services

The world economy does not seem to be in any better shape than before. The canvas is made up of large patches of bad news with occasional spots of good tidings. The global services industry continues to chug along; there is no cause for any permanent gloom on the horizon even if the sun is not shining so brightly.

The 4Q2012 TPI Index identifies three short-term trends:

- In the US, the adoption of large deals has expanded to include companies that are ranked Global 200 to Global 500. Between 2010 and 2012, the share of large deals in this segment increased by 32 percent.

- Emerging markets are driving sourcing annual contract values (ACV). Since 2007, Latin America and Mexico has seen a 150% increase in ACV, while India and China has seen an increase of 100%.

- The BPO industry has grown by 60% in terms of ACV in the last two years with growth coming in from industry-specific solutions.

Interestingly, all the three short-term trends are irreversible and hold great growth potential. Further, these will play out over the next few years and therefore they are not necessarily short term trends.

The sourcing industry is moving into a phase of rapid change and growing uncertainty. Technologies such as cloud, big data, analytics, social media, mobile are creating massive disruptions. Add to that the emergence of multiple sourcing models, service delivery models, and engagement models. These amount to significant change in the risk landscape that forces a rethink of governance models, risk management

mechanisms, performance management, and vendor relationship management.

We see a change in three areas. The first one is about managing technology-driven disruptions. The second one deals with managing sourcing relationships in a far more scientific and evolved manner. The third is about getting the right mix of sourcing- insourcing, outsourcing, various forms of offshoring- and continually optimizing the mix to extract value.

Sourcing leadership depends on how organizations master these axes of change, how these new levers of value are managed.

Project Team

Ed Nair, **Editor**

Satish Gupta, **Head Sales & Marketing**

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Shilpa Shanbhag, **Sr Correspondent**

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Pramod S Rawat, **Design and Layout**

Nasscom Predicts Positive Outlook for IT-BPM Industry in FY 2014, Run-rate of \$12-\$15B Annually

Nasscom has released the Strategic Review 2013, its annual report on the IT-BPM sector. Som Mittal, Nasscom Chairman, outlined a positive outlook with exports growth rate of 12-14% and domestic market growth

of 13-15% in FY 2014. These growth rates translate to a run-rate of \$12-\$15B annually.

In FY 2013, exports reached \$75.8B and the domestic industry clocked Rs. 1047B. Around 188,000 jobs were added during the year which takes the direct employment by the sector to 3 million. The sector's impact on India has been significant: it accounts for 8% of GDP representing growth thrice over and exports contribution of 24% representing growth of five times over in the past 10 years.

India now holds 52% share of the global sourcing market which itself grew 9%, outstripping growth in IT-BPM spends. During the year, IT services crossed the \$50B mark and BPM and Engineering R&D with each at \$20B.

N.Chandrasekaran, Chairman, Nasscom, outlined the



Natarajan Chandrasekaran
Chairman NASSCOM

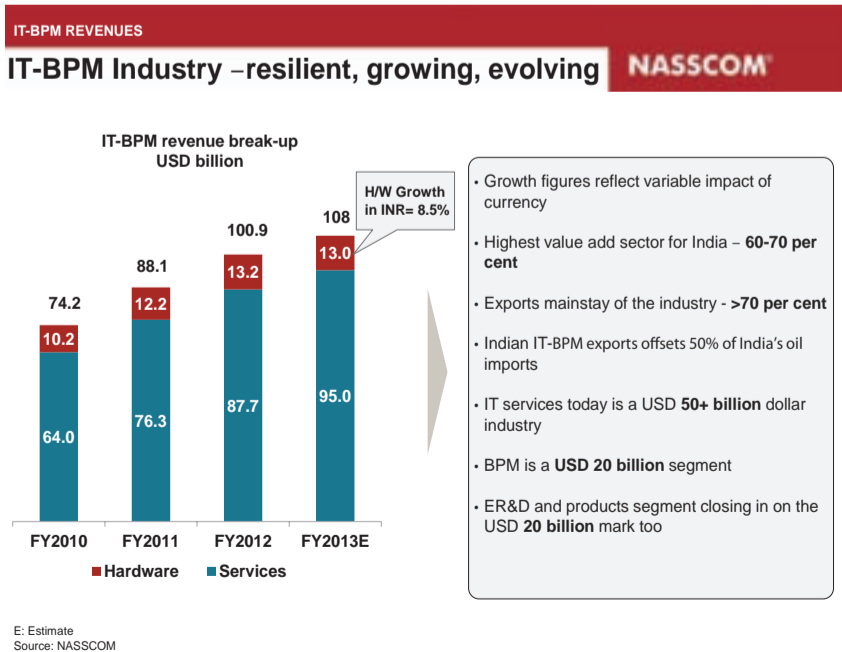
four key growth drivers to be:

- Customers continue to seek efficiencies through transformation of operations

- IT is shifting from traditional process automation to strategic BI, collaboration, and customer-facing technologies.

- Rate of adoption of disruptive technologies (social, mobile, analytics, cloud) would intensify. Spends over \$1T is expected by 2020. This has implications for services, products, and platforms.

- Apart from mature verticals, the next big spenders would be APAC, SMB, and domestic market.



Day 1, 13 Feb

Time	08.30 - 09.30 hrs
Theme	Outside In: Customer centricity
Speaker	Steve Towers, Business Process & Performance Expert(Pre registration required)
Venue	Grand Salon

Time	0930 – 1030 hrs
Theme	Inauguration & Social Innovation Honors
Venue	Grand Ballroom I, II, III
Speakers	Anand Sharma, Hon'ble Union Minister of Commerce and Industry, Prithviraj Chavan, Hon'ble Chief Minister of Maharashtra, Natarajan Chandrasekaran, Chairman, NASSCOM, Krishnakumar Natarajan, Vice Chairman, NASSCOM, Som Mittal, President, NASSCOM

Time	10.30 – 11.15 hrs
SESSION I	Spotlight Keynote
Theme	Imagineering: Seeding the field of the Future!
Venue	Grand Ballroom I, II, III
Speaker	Mike Walsh, Futurist & Author

Time	11.15 – 11.45 hrs Tea / Coffee break
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Time	11.45 - 12.45 hrs
SESSION II:	Reality Check
Theme	Is India suffering from tall ambition & dwarf execution?
Venue:	Grand Ballroom I, II, III
Discussants	Janmejaya Sinha, Chairman - Asia Pacific, The Boston Consulting Group, Omar Abdullah, Hon'ble Chief Minister of J&K, Sachin Pilot, Hon'ble Minister for Corporate, Affairs
Moderator	Swaminathan S. Anklesaria Aiyar, Consulting Editor, The Economic Times

Time	11.30 – 12.15 hrs
Theme	In the Spotlight Greenshoots in the US business & economy
Speaker	Ganesh Natrajan, Vice Chairman & CEO, Zensar Technologies (Pre registration required)
Moderator	Ganesh Natrajan, Vice Chairman & CEO, Zensar Technologies (Pre registration required)
Venue	Grand Salon

Time	12.45 - 13.30 hrs
SESSION III	Power Discussion
Theme	Indo-US ties: Oversold or defining relationship of the 21st century!
Venue	Grand Ballroom I, II, III
Speaker	Jack Markell, Governor, Delaware US, Kanwal Sibal, Former Foreign Secretary, Govt of India
Moderator	Rajendra Pawar, Chairman & CoFounder, NIIT

Time	13.00 – 14.00 hrs
Theme	Hidden Opportunities in 2% Mandate
Discussants	Sachin Pilot, Hon'ble Minister for Corporate Affairs Som Mittal, President, NASSCOM
Venue	Board Room 1

Time	12.30 - 13.30 hrs
Theme:	Leading MNCs in India: Does nationality matter?
Speaker	Ganesh S. Lakshminarayanan President & Managing Director, Dell India Jeffrey M. White, President India & SAARC Cisco
Moderator	Ravi Venkatesan, Director, Infosys & AB Volvo

Time	13.30 – 14.30 hrs Networking Lunch
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Time	14.30 - 15.30 hrs
SESSION IV	Customer's Take
Theme	Co-creation: Has value surpassed cost as the deal clincher?
Venue	Grand Ballroom I, II, III
Discussants	Adriana Karaboutis, CIO, Dell, Aruna Jayanti, CEO, Capgemini India, Jacob Lamm, Executive VP Strategy & Corporate Development, CA Technologies, Roger Gurnani, Executive VP & CIO, Verizon Communications
Moderator	Chris Andrews, Principal Analyst & Research Director, Forrester

Time	14.30 – 15.30 hrs
Theme:	Analyzing Japan Conundrum: Is there an IT market
Guest Speaker	Nobuhiko Hidaka, President, Gartner Japan, Takeshi Yagi, Ambassador of Japan to India
Host	Som Mittal, President, NASSCOM

Time	15.30 – 16.15 hrs
SESSION V	In conversation
Theme	Cross Border Leadership: Maneuvering fragile differences!
Venue	Grand Ballroom I, II, III
Speaker	R Gopalakrishnan, Executive Director, TATA Sons Ltd, Vineet Nayar, Chairman & Jt MD, HCL Technologies Ltd
Moderator	Shereen Bhan, Delhi Business Chief & Executive Editor, CNBC

Time	16.00 – 17.00 hrs
Theme	Vendor consolidation & strategic partnerships-through the customers' eyes Chris Andrews, Principal Analyst & Research Director, Forrester

Time	16.15 – 16.45 hrs Tea/Coffee
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Time	16.45 – 17.30 hrs
SESSION VI	Emotional intelligence & bottomline
Theme	Connecting excels and nerve cells in Leaders!
Venue	Grand Ballroom I, II, III
Speaker	Dr Travis Bradberry, Emotional Intelligence Expert & Author

Time	17.00 – 18.00 hrs
Theme	Close Door session with Hon'ble Minister Pallam Raju
Venue	Board Room 1

Time	16.30 - 17.30 hrs
Theme	Maverick Moguls: The story of Entrepreneurs Extraordinaire
Panel	Deep Kalra, Founder and CEO, Makemytrip.com Dhiraj C Rajaram, Founder, Chief Executive Officer & Chairman, Mu Sigma Sachin Bansal, CEO, flipkart
Moderator	Raman Roy, Chairman & MD, Quattro
Venue	Grand Salon

Time	17.30 -18.30 hrs Networking Break
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Time	18.30 - 19.00 hrs
SESSION VII	Legends in conversation
Theme	Reinvention of Self: The Real Comeback!
Venue	Grand Ballroom I, II, III
Speaker	Vir Sanghvi in conversation with Living Legend Amitabh Bachchan (audience to be seated by 1815 hrs)

Time	19.00 hrs onwards
Theme	NASSCOM Global Leadership Awards sponsored by Capgemini
Venue	Exhibition Grounds, Grand Hyatt
Chief Guest	M M Pallam Raju, Hon'ble Union Minister for HRD Followed by Cocktails & Dinner

Opportunities Galore: Manesar as the next IT/ITeS hub

An integrated business city built on the concept of environmental integration with industrial development. Manesar is where business, lifestyle, housing, healthcare and academia come together in perfect agreement.

Initially developed as an Industrial Hub, Manesar is now fast becoming an attractive destination for other businesses specially IT/ITeS, R&D, Back-office operations and related services.

Location & Connectivity

- Ideally located on NH-8, about 45kms from Delhi, and 15 kms from Gurgaon, 32kms from Delhi International Airport.
- ITPO to shift India International Trade Fair to Manesar.
- The 25000 acres Reliance SEZ to come up near NH-8.

Infrastructure

- Sector 8 is dedicated towards IT/ITeS infrastructure and the property rental in Manesar is approximately one-third that of rental in Gurgaon and infrastructure is at par with any well planned city in the world.
- Robust civic infrastructure (roads, power, telecom, water and sewerage).
- Facilities like Helipad, Fire Station, Skill Development Center, Police Station, Shopping Malls, Health Facilities, School Sites, Sites for Post Office/Banks, Conference Centre, Warehousing & Cargo Facilities and HSIDC office complex housing for all industry related government departments.

India's First Business Eco-City

- Japan's Toshiba team undertook the project of building Manesar as First Eco City of India. This will be funded by the Ministry of Economic Trade and Investment, Government of Japan .An Eco-city is defined as a city in which citizens, business and government sustainably work, live and interact through delivery of integrated, low carbon products and services.
- The objective of this project is to build a new industrial community to maximise welfare of the people and minimise carbon emission and the above vision can be achieved by integrating technology across

water, waste, energy, transportation and safety infrastructure while taking measures like maximum utilisation of renewable resources for electricity supply, minimum loss of natural resources and others.

Rising Japanese Interests

■ One of the largest infrastructure projects in the country-DMIC (Delhi Mumbai Industrial Corridor) worth USD 90 Billion is coming up through financial & technical aids from Japan, covering an overall length of 1483 KMs between the political capital and the business capital of India, i.e. Delhi and Mumbai. The vision for DMIC is to create strong economic base in this band with globally competitive environment and state-of-the-art infrastructure to activate local commerce, enhance foreign investments, real-estate investments and attain sustainable development.

Growth Corridors

■ Apart from DMIC, there are other major expressways or growth corridors surrounding Delhi NCR will be passing through Manesar increasing the employee catchment for Manesar as an IT/ITeS destination. Key corridors are KMP (Kundli – Manesar – Palwal) expressway and KGP (Kundli-Ghaziabad-Palwal), each 135Km.. Though these greenfield expressways were planned to reduce congestion on Delhi roads, now these two road networks are emerging as the biggest contributors to residential and commercial developments.

Anchor Companies

- Manesar has projects with foreign technical collaboration. Maruti Udyog Limited, Hero Honda, Modi Alcatel, VXL India, Perfitti India, Benetton, Energetic, Hamdard, Optiflex to name a few.
- Over 800 MNCs have their offices in Manesar.
- HCL leaders in IT technology have set up a dedicated campus in Manesar with a workforce of 8200 people.

Civic Amenities

Comfortable and environment- friendly lifestyle is supported by infrastructure facilities, civic values and community development ideals.



Som Mittal

President,
NASSCOM

"It is necessary for us to move into new areas. It is important as we develop Manesar, we also help Gurgaon get better. It is important to carry Gurgaon with us as we expand into Manesar because existing people would be the best proponent of Manesar.

Manesar could be new model of integrated township. It is a big opportunity and a great location, it expresses itself on a belt which I think just continue to grow"



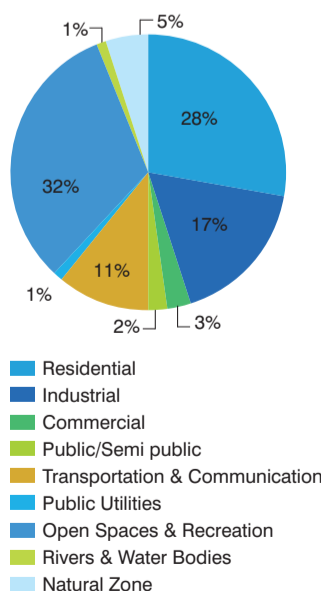
Nitin Seth

MD and country head, Fidelity India

"Manesar is really a extension of Gurgaon and for me it is improving the Gurgaon ecosystem. I think there is value proposition for large companies which are there in Gurgaon to extend their operation in those ecosystems."



Well planned residential development



Source: HSIIDC



Multi-speciality hospital (Rockland)

Speakers @NILF 2013

BPM: What's next in global business services

Keshav R. Murugesh
Group CEO, WNS

I foresee the BPO sector to grow at a steady pace. The outsourcing represents one of the highest potential for India's economic growth and I believe that it will continue to grow further to become larger than the IT

business itself.

BPO has changed significantly in nature from the old days when clients asked vendors to manage certain tasks and deliver on SLAs.

Today, the nature of work performed is very different, there is significant value creation and transformation being delivered, and Business Process Outsourcing companies, the higher value providers like WNS, are engaged in Business Process Management where an end to end process is delivered across multiple time zones and embellished with analytics, decision support systems, technology platforms and non linear models.

Market leaders don't do different things, they do things differently

Jaime Vallés
President Cisco Asia Pacific,
Japan and Greater China

Understanding market transitions and your company's past achievements are never a guarantee for future success; hence the need to change business models and to constantly stretch ourselves for success. The ca-

capacity to capture innovation through internal development, external advice or M&A is critical, but more importantly the ability to drive change through an organization requires a very solid, human platform. You need to maximise the involvement of your people, as motivation and participation are critical to maintaining the majority of people from acquisitions for at least 3-5 years. In the words of marketing guru, Peter Drucker, "Culture eats strategy for breakfast." At the current speed of change in many different markets, this should be a continuous process and a normal way of life in any company's culture.

The new age of analytics

Rahul Kanodia
Vice chairman &
CEO, Datamatics
Global Services

Analytics calls for people who understand Psychology, and statistics because it is not just a matter of going through a website and pulling keyword. For analyzing trends, the knowledge of statistics is important. The psychologist will understand human psychology but he may not comprehend the nuisances of insurance, banking, research and telecom. However, the domain understanding is very critical. So, if you are looking at analyzing consumer product than you need to understand the dynamics of consumer product industry. Thus, what is required is a combination of Psychology, domain and statistics. However, it is not easy to have all of these in one person. So you will have multiple people working on the same project.



Michael Corcoran
Growth and
strategy lead, BPO,
Accenture

Analysis of transactional and other data provides clients with actionable insight into their business operations – for example, enabling them to improve working capital management, claim full discounts from their providers for paid-within-terms invoice processing or improve customer acquisition, satisfaction and retention. Conversely, analytics helps optimize clients' payment terms and reduce their rogue spend that has not passed through preferred suppliers. This means they can increase control, reduce risk, and capture additional value that would not have otherwise been realized.



Sundar Ramaswamy
COO, AbsolutData Research
& Analytics

Traditional strength are the strengths they already have. In the last few years, service providers have perfected the art of outsourcing. They are very good at handling outsourcing, their processes are established and so they really understand the process. The fact that they are known helps them get work from the client. I also think they have made a brand for themselves. Thus, they already have the inroads to the clients.

The BPO and Outsourcing Outlook in 2013



John Willmott
CEO, NelsonHall

NelsonHall has just interviewed 480 organizations globally across U.S., U.K., Continental Europe, and Asia Pacific, as part of an annual exercise carried out by NelsonHall to establish the business issues and initiatives faced by major organizations by sector and geography.

This includes assessing the relevance of outsourcing to major organizations as part of their future operating models. Overall the current economic environment has led to increased recognition of the role of outsourcing, with 73% of organizations globally now stating that BPO has high relevance within their future global operating models. These organizations recognize that the current economic environment is here for some years to come and that their operating models need to be amended to adapt to this environment. This effect is particularly noticeable in Europe where 46% of major organizations perceive that the Eurozone crisis will lead to increased application of BPO during 2013.

So how are organizations overall responding to the current economic situation? Well since end 2008, NelsonHall research has tended to identify the same three major priorities induced by the ongoing economic slowdown: the need to increase the efficiency of organizations' mainstream business, the need to retain, and maximize the potential of, their existing customer base, and a need to enter new markets typically increasing the proportion of revenues from emerging country markets.

These priorities have now been overtaken in 2013 by a new factor induced by economic uncertainty, namely the need for improved business agility, now rated as highly important by over three-quarters of organizations globally. So while organizations still expect a low-growth economic environment, they currently have a high level of uncertainty about what the future holds and are looking for the capability to respond quickly to economic threats and the capability to take advantage of new business opportunities immediately they arise.

Accordingly, the most important operational outcomes that major organizations are seeking in 2013 are improved standardization of processes across business units and geographies and enhanced organizational agility. These are followed by the ongoing need for revenue opportunity maximization from the existing client base and a continuing need to reduce SG&A costs. On average, organizations report seeking further annual cost reductions of over 5% in SG&A and 3% in core operations in 2013.

What does this mean for suppliers? Well firstly process standardization is important with organizations increasingly willing to apply an element of process standardization prior to BPO service roll-out.

However, any associated investment may well need to be financed by suppliers. Commercially organizations are increasingly looking to implement increased organizational agility by moving to usage based transactional pricing models. Contrary to much market hype, most major organizations, when they talk about outcome-based pricing mean transaction based pricing rather than gainsharing based on changes in business model. Transaction- or usage-based pricing will be an important shift in commercial model in 2013.

Delivery Will be Key in Buyers' Eyes in 2013



Jens Butler
Principal Analyst, IT Services, Ovum

At the start of 2012, the overall global outlook was cautiously optimistic, with the view that although the mature economies of Western Europe and North America were still struggling to regain their mojo, continuing Asian and Latin American growth would lubricate a much-anticipated rebound – however, the IMF recently re-lowered its projection for global growth in 2013 to just 3.6% (assuming the US will avoid the “fiscal cliff”).

IT customers are demanding greater predictability and control as a more risk-averse perspective takes hold.

Assessing Your IT Outsourcing Framework in the New Year



Christopher Stacy
Senior Associate, Pace Harmon

As part of this evaluation, IT groups should determine whether previous outsourcing decision criteria have changed and whether supplier performance is meeting the standards anticipated at contract signature. The results of this assessment will help determine whether and how to take action.

Companies should determine whether their previous decision criteria are still valid – i.e., whether the lens through which the outsourcing decision was made is still appropriate given the evolving corporate objectives. If you were to reevaluate a “build” versus “buy” decision today, would the same weight be given to cost reduction, speed of standing up the operation, or retaining certain skill sets internally? .

Source: www.globalservicesmedia.com



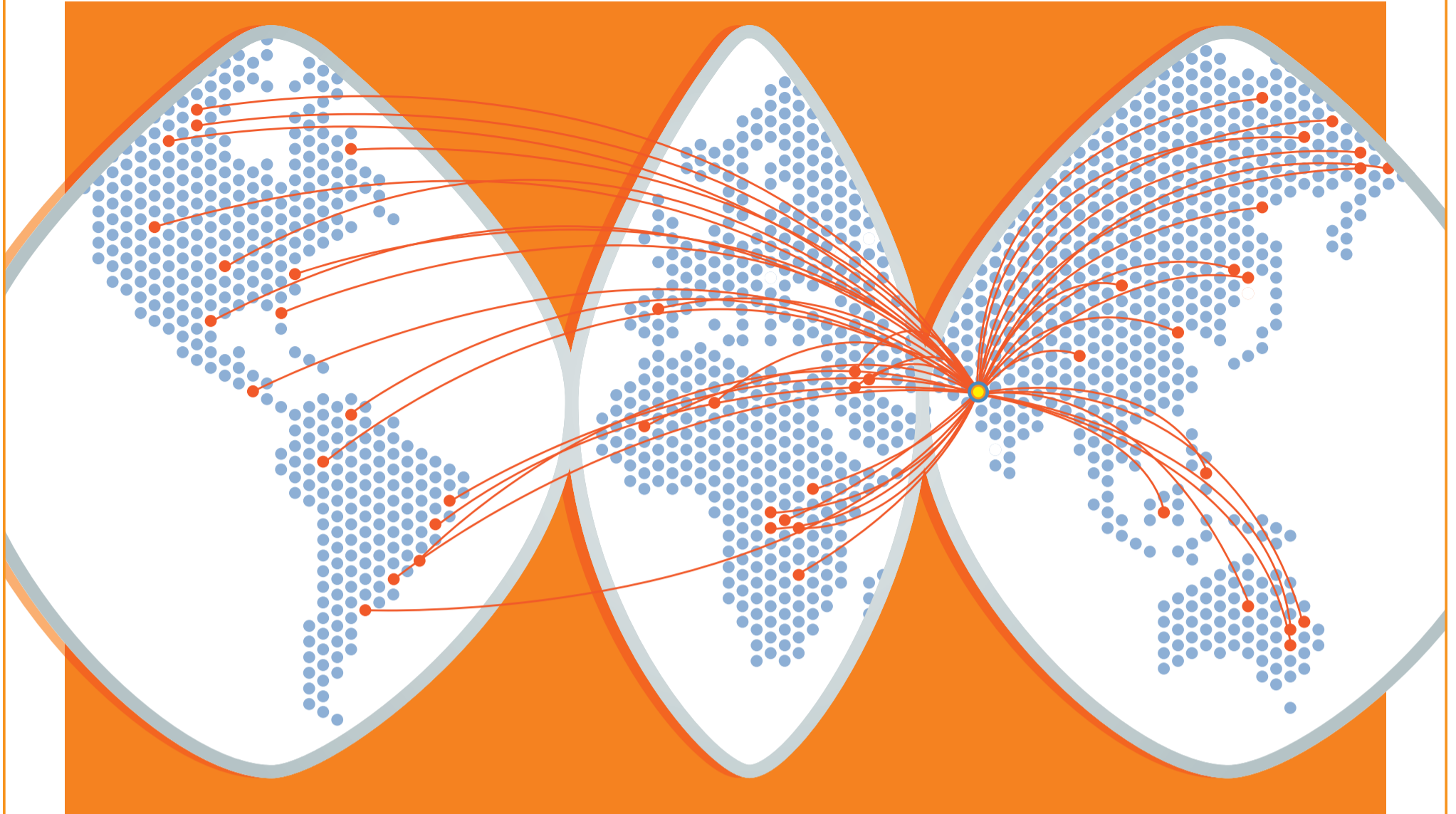
Rajeev Mittal
Managing Director
India & SAARC
Avaya

Customer Experience Management 2.0

Customer service continues to transform and it's the end consumers who are driving this transformation. Today's customers want to get served in the medium of their choice not limited to voice based interactions only. More than 60% indicate they would use Email, Web and Social media over the next year. The 5 major trends that we are seeing in customer expectations are as follows:

- Anytime, anywhere, any-channel access
- More personalized experience
- Less waiting and more efficient without repeating info
- Faster resolution and handled by the right person

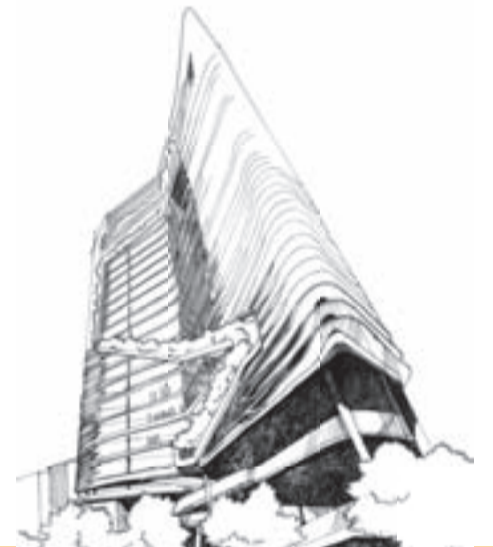
The outlook for the next 3 to 5 years in terms of enablers for future of customer experience is going to be about the right media at the right time, preserving context of every interaction, enterprise wide engagement and gaining actionable insights on the customer experience requirements. In the end this customer experience will drive brand and customer lifecycle value.



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"The World Trade Center of Greater Philadelphia is a great institution for a small company like ours; it provides resources and international reach far beyond what any small business could develop alone."

LORRAINE H. KELLER
Ph.D., CEO,
Technical Vision Inc.

"Integra had one office in Asia. With the help of the WTC San Diego trade research team, we added several new member firms and today we have 40+ offices throughout Asia."

Steve Austin
President, Integra International



"The WTCGP, through its vast network of in-country representatives across the globe, has been instrumental in helping DUNMORE find international opportunities." "We'll continue to use their services as part of a comprehensive strategy to support our global growth goals."

JOHN JORDON
Vice President, Sales,
DUNMORE Corporation

