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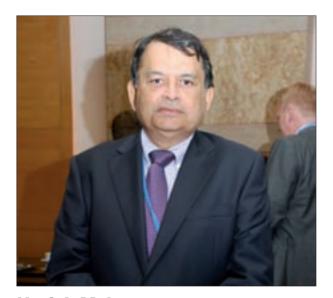


The Vexing Tax Issue

ataquest caught up with Harish Mehta, Chairman, Onward Technologies and one of the founders of Nasscom. Harishbhai, as he is popularly known within the industry, has been Nasscom chairman in the past and he has led numerous initiatives to advance the interests of India's software industry. Harishbhai is also the classic first-generation global Indian technology entrepreneur.

We asked him what his outlook was on India's software industry of 2013. He said that he was concerned about the hurdles to entrepreneurship, especially at a time when the time was ripe for entrepreneurship to flourish. The most vexing issue is the slew of taxes that the government wants to extract in advance. He says, "These taxes are enough to nip the entrepreneurial spirit in the bud."

Nasscom recognizes the problem or the issue but a workable solution is yet to be arrived at. Harishbhai asserts that this would require a special consideration or an out-of-the-box solution similar to what N.VIttal came up with when he set up the STP scheme with 64 kbps link to promote software exports.



Harish Mehta Chairman, Onward Technologies

A simplification of the tax structure is imperative to promote entrepreneurship. Harishbhai also invites suggestions from software companies, consultants, media, and all walks to resolve this issue. Write in to ed@cybermedia.co.in with this headline in subject.



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Life is a struggle, it's never going to be easy; but the acceptance of this fact will make life a little easier-@ SrBachchan #NASSCOM_ILF

Valuation is an important driver, but it not the only driver.-Raman Roy #NASSCOM_ ILF @Raman Roy

Pramod Bhasin begins the Innovation Panel - 'Market Leaders don't do different things, they do things differently!' #NASSCOM_ILF

In order to be a successful leader you have to be passionate and credible-

Jaime Vallés #NASSCOM_ILF

Stuff that has helped us in the past may not always help us in the future.-

T K Kurien #NASSCOM_ILF

The best kind of investor is the one who knows what he doesn't know. - Deep Kalra #NASSCOM_ILF @deepkalra

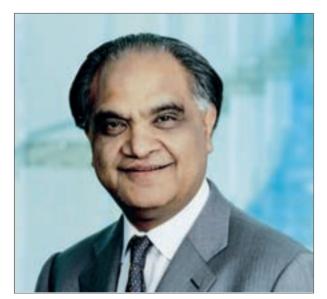
To have intellectual honesty, you need to have conflicts.-Dhiraj C Rajaram #NASSCOM ILF

People often make the mistake of winning small battles rather than the war.-Travis Bradberry #NASSCOM_ILF

Nations are now becoming very border conscious-R Gopalakrishnan #NASSCOM_ILF

India has a highly skillful workforce and it is important for the US to ensure the same for its workforce. -@GovernorMarkell

Managing the future in uncertain times



Ram Charan **Business Advisor & Author**

usiness guru Ram Charan's keynote on 'Leading in Uncertain Times' was as much steeped in practical ideas as with wonderful insights from his writings and consulting work with world-leading companies. Ram's dominant thrust was on 'catalysts'- the individual agents that trigger changes in markets and entire industries and on senior executives having an 'outside-in' view of things. Steve Jobs was the catalyst in changing the music industry and the computing industry. Another example is Amazon's Jeff Bezos.

The process of dealing with uncertainties starts with the mindset that sets the eye firmly on the prize and the mind that should be directed at folding the future back. Organizations can seed this mindset by simple procedures like 10-min meetings and quarterly round-ups where one single individual will report on one uncertainty and identify the catalyst behind that. In the next meeting, another person does this, then a

third, and so on. The process will lift the altitude of thinking, said Ram.

Segregating the known unknowns and devising ways to deal with them is the easy part. The difficult one is to discern the unknown unknowns. Perceptual thinking is the only way to make this happen. Gathering unfiltered ground-level intelligence, choosing the right goals, measuring the upside and the downside, providing a war-chest, and keeping an eye-out for body blows are sound ways to deal with uncertainties in the short to medium term. Management jargon might call this as 'risk management', but Ram's practical examples go a long way in demystifying it.

Once again, spotting catalysts through perceptual thinking, imagining the convergence of trends, identifying the shifts of profit pools, detecting cross-industry effects, anticipating regulatory impacts, and managing geo-political, geo-economic, and geo-financial risks, are ways to identify future trends.

The imperatives for leaders, as prescribed by Ram, deals with developing the external focus, managing the short-term with the long term, building new capabilities, and having a razor-sharp focus on execution. Leaders should also develop the capacity to create flexibility in configuring resources and become adaptable to shifts in portfolio.

Regarding India, Ram is bullish. He exhorted Nasscom attendees to figure out the future instead of bemoaning uncertainties and difficulties in planning for the future. The central tenet is that we have the opportunity to create the future. He thundered-"We can determine our destiny". He urged business leaders in India to make talent more employable, to promote FDI and value-added exports, and to balance our priorities and opportunities with China. No soothsayer that he is, Ram's ending notes were encouraging. True to his Indian identity and lineage, he enjoined - "Let us join hands to go forward".

Digital Consumerism, a game changer for India

The next wave of growth will emerge from convergence of disruptive technologies



ise in digital adoption by consumers in going to inevitably lead to the convergence of new age technologies-indicates the KPMG report launched at the NASSCOM India Leadership Forum 2013, yesterday.

Digital Wave

"A rapid increase in digital consumerism will be seen in the coming decade and we are already witnessing micro-segmentation of customers and product & services being tailored at individual level. IT vendors need to work closely with their customers and come up with platforms that can take advantage of the convergence of the technologies," said Pradeep Udhas, Head IT/ITes, KPMG in India.

He further added, "IT vendors really need to listen to the end customers while innovating or developing solutions and products. The emphasis needs to be on tapping inputs from various channels, mediums and devices and using these as critical inputs for new solutions and incremental innovations. Industry bodies can also play a vital role in this, and increase awareness about convergence of technological trends."

Digitally active consumers have embraced the internet, telecom, media, and social space; changing the way they communicate, transact and make purchase decisions, thus leading to the birth of an era of digital consumerism, the report states. Rise in the number consumers who shop online, seek recommendations and interact with brands presents a tremendous opportunity for companies.

Disruptive Technology

While technologies such as big data and cloud have been dominating the imagination of enterprises for the past couple of years, new disruptive trends like augmented reality and social media have only now started having a tangible presence. The maturity curve of these technologies is estimated to increase at a rapid pace over the next decade, with big data and cloud estimated to reach a market potential of tens of billions of dollars.

KPMG in India estimates that the future of IT-ITeS players in India and globally is dependent on how fast they adapt to the changes in customer demand. There needs to be a strategic shift in solution offerings and supportive ecosystem going forward wherein vendors provide not just the standard core industry platforms, but also think ahead of the curve Krishnakumar Natarajan, Vice Chairman, NASS-COM, opined, "If the first 20 years the efforts were to make towards driving efficiency, now consumerisation of enterprises is happening. The line between official and personal work is blurring. Convergence of some of the segments is dependent on how we can leverage on IT. How we will capture the new markets will make a huge difference."

On a final note

The sheer size of the government sector can drive the growth of emerging technologies and since the government interacts with almost all the stakeholders in an economy all the disruptive technologies find utility in one way or the other.

The Social Innovators



peaking about how innovations helped them make the defining change, some of the winners of the NASSCOM Social Innovation Honors spoke of their experiences.

Anand Bajaj, Group Executive Vice President and Chief Innovation Officer, Yes Bank-We listened to the weak signals and connected the dots. A couple of interviews later we concluded that it was the hardearned money that people were sending back home. And at the end of the day, it is also important to follow your gut feeling, and we were lucky to have the support of our management.

Abhinav Sinha, co-founder and COO, Eko India Financial Services Pvt Ltd-Through our low cost financial services we managed to create a banking network for the lesser literate people. On one side, we partnered with banks like Yes Bank and on the other side, we tied up with retail outlets. To ensure the success of this network, you have to build a lot of trust and for that a lot of awareness needs to be created.

Shyam Bihari Singh, Deputy Director General and State Informatics Centre, NIC, UP-I was handed over the project in 2007. A challenge in itself as the education sector was marred by mafia, bogus schools. Gaining true information with the help of NGOs and the media helped us to prepare a transparent system.

Sudhanshu Tripathi, Finance Controller, Mid-Day Meal Authority, UP-We send in IVR calls to which the number of students fed for that day needs to be fed from the other end. The data is then fed into the server and now we are flooded with data.





SPEAKERS

Vishal Ahluwalia

Executive Director - Operations Head Outsourcing & Offshoring, UBS

Dave Colesante

Senior Vice President of Product Development & CTO, Alert Logic

Precy B. Goldstein

Director - Corporate Development Organization, UBS

Donald Mones

IT Vendor Management & Sourcing, MetLife

Atul Vashistha

Founder & Chairman, Neo Group

Pankaj Sharma

Partner, Neo Group

Alan Hanson

Senior Vice President, Neo Group

Hemant Puthli

Partner, Neo Group

HIGHLIGHTS

- Full day with over 12 key sessions
- 25+ Speakers from leading global enterprises
- Keynotes, Plenary sessions
- SESSIONS ON: Managing Disruptive Forces
- SESSIONS ON: Managing Relationship Portfolios
- Networking opportunities with industry peers

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Tech Predictions-Myth or Reality

ome of the statistics on hot technologies the Analyst firms come out were indeed mind boggling and sometimes one does wonder whether all those prediction comes true and is it really in sync with the customers. This was the undercurrent of discussion on a very interesting panel discussion on the theme: Are technology predictions redundant? Do we really know where we are headed?

The panel consisted of Christoph Baeck, CIO Asia, Hilti, Gerald Hoehne, CIO, SMA Solar Technology AG, and Manu Parpia, MD & CEO, Geometric. The panel was moderated by Chaitanya Kalbag, Editor, Business Today.

Manu Parpia, while echoing that absolute predictions are not possible at the same time said that some amount of trend gazing is required for understanding the market progression.

Meanwhile Gerald Hoehne also agrees to the same thought. He said, "If we look back at all the prediction in the last many years and look at how much of it has actually happened in the scale as predicted, would throw up some insights. But some degree of future gazing is certainly required for

Christoph Baeck feels that prediction assumers important when we put the IT department in per-



spective. He feels that the CIOs job becomes lot more easier if they are able to understand the p[progression of IT and how it will impact them per se. That kind of prediction CIOs need to bank on."

The key takeaway at the end of the session was that prediction need to be tailor made to the organization needs and it need to be in sync with the customer aspirations.

Big Data-Big Impact

n line with the trend, speakers at NILF 13 banked heavily on key trends like Big Data and Analytics. In the session titled – "Transactional to transformational: Co-relating business to hidden intelligence", Manoj Singh, Chief Operating Officer, Deloitte Touche Tohmatsu pondered on the multi-fold ramifications of the Big Data phenomenon. Singh spoke about how Big Data is encompassing the whole gamut- starting from enterprise to consumer and in the bargain having its impact on every levelmarketing, social media, government, individual and whole lot of others. "Gaining insight from this seemingly spread across area is the most important to any organization."

Singh reflected on some Big Data success stories, including his own organization and how it has leveraged on Big Data. "At Deloitte, we have understood the employee aspirations well and are able to put a cap on attrition by putting in place a Big Data strategy that has made it manage attrition more effectively. We captured and analyzed traditional and non-traditional variables. We factored in aspects like attrition rates and the cost of hiring replacements and looked at greater employee satisfaction and better management of HR challenges."

Outside of his organization, Singh talked about how leading Airlines are leveraging Big Data in understanding the consumer behavior patterns as well as for



organizational efficiencies. Yet another interesting example Singh shared relates to Netflix and how it forced another company called Blockbuster out of business. While Blockbuster adopted a model that was once good but once Netflix mapped the customer expectations more in sync with their expectations, it was able to offer more innovative pricing and service models.

Given the large scale impact of Big Data, what does the future hold? Singh shared the overall outlook on the Big Data progression and the significant trends he shared are: By 2020, close to 40 billion new connected devices will be connected in the Internet. By 2015, Big Data will create 4.4 million IT jobs globally. Meanwhile Big Data market in early 2012 is estimated to be \$ 5 billion and is expected to reach\$ 23.8 billion by 2016, growing at a CAGR of 31.6%.

Putting a Big Data plan



or enterprise struggling to find a way out of the data maze and wanting to create a Big Data plan and a strategy, Manoj Singh has the following advice which he called 'Options for Action"

Action 1: Start with highly specific questions about the business problems you are trying to solve

Action 2: Artistry comes from fine tuning discipline with the need for agilitymake sure the technology choices you make can support such flexibility.

Action 3: Focus on Force-organizational silos to understand your strategic goals.

Action 4: Build your bench with leftbrained data scientists and right brained virtualization teams.



Editor's Note

What happened yesterday

Ed Nair

The author is Editor of Dataquest & Global Services

ttending conferences like Nasscom ILF is always a challenge in terms of managing time. However well you plan the day, deciding between sessions to attend, people to network with, and interviews/ meetings to go for, you always emerge with a different outcome. Some sessions are titled very provocatively, while others are understated. When your expectations are thrashed, you look for the next best available opportunity. That's when you realize a missed opportunity. And, perhaps a missed appointment. Only the first session and the last (usually the cocktails and dinner) go as planned. Thank everyone for that!

Business guru Ram Charan opened the day to an earful of good advice. He outlined ways in which leaders can manage uncertainties. His key point was that we need to employ perceptual thinking to discern future patterns; we need to identify catalysts or change agents, and employ an anchor to bring the future forward to us.

Roger L. Martin, Dean, Rotman School of Business outlined a good 5-point framework for formulating strategy. The key message was that strategy is all about making the right choices. Even simpler, it is all about making five choices.

Another session drove home the point of customer satisfaction and perhaps customer delight as the key differentiator in the business. Walmart CIO,

Karenann Terrell, provided the dimension of building trust with customers. Big Data is one of the disruptive technologies that presents huge opportunity in services. The Deloitte session conveyed the pervasive impact of Big Data. Some of the CIO speakers had an honest submission to make: the confluence of disruptive technologies makes them both excited and sleepless.

There has been lot of future-gazing about technology and its impact on the services industry. The question is – do predictions matter? In a session, the import was that technology roadmap and predictions go hand in hand, but the numbers most often don't really help. For one, either the prediction or the timeframe or both are ambiguous. Analysts seem like a necessary evil, the panel seemed to conclude.

Be in touch with me at ednair@cybermedia.co.in. Enjoy the last day at Nasscom ILF 2013! Safe travels.

Global Services Announces GSC 2013

he Global Services Conference 2013 is scheduled to be held 03/14 at New York City. The working website for the event is: www.globalservicesconference.com

The provisional theme statement of the conference is 'Mastering The Three Levers of Effective Sourcing Leadership' The conference will discuss three key areas:

- Managing Technology Disruptors: Cloud, Big Data/Analytics, Mobile, Social Media
- Managing Portfolios: Emerging Trends in Governance, Risk and Vendor management offices
- Managing Service Delivery Models: Onshore, Nearshore, Offshore and Shared services

The Global Services Conference 2013 will delve deep into these realities. It will bring together ideas, thoughts, opinions and experiences and come up with 'real' ways of overcoming challenges and identifying the best opportunities amidst these disruptive changes.



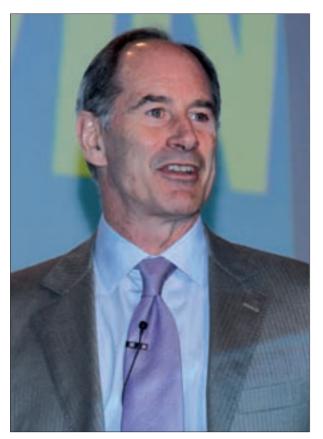
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Rajeev Mittal Managing Director India & SAARC Avaya

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- Tools to understand call flows, which are efficient and which can be improved, thus improving efficiency further



Roger L. Martin Dean, Rotman School of Business

DIY- Designing Strategy in 5 Steps

oger L. Martin, Dean, Rotman School of Business, has co-authored a book, 'Playing to Win- How Strategy Really Works', with A.G. Lafley, the legendary CEO of P&G. Roger demystified the holy grail of strategy down to making the right choices. He said, "Strategy is essentially about a making a finite number of choices". To win, a company must choose to do some things and not do the others. Choosing to do everything is to spread your resources thin and diffuse management focus which is a sure-shot recipe for disaster.

Roger crunched down the 'choices' concept to five simple questions that become the guiding framework to formulating strategy. The five questions to be answered in a non-linear and iterative process are:

- What is our winning aspiration? Note the emphasis on winning. The process has to start with the desire to win or someone else with the desire to win will overtake vou.
 - Where will we play? This is a difficult choice

because you have to employ all senses and read all signals to decide on a specific space.

- How will we win? This helps come out with a unique plan to execute.
 - What capabilities must we have?
 - What management systems are required?

Roger thrashed the traditional process of strategy making that starts with a SWOT analysis and then goes on formulating the vision statement, then the measures, and such. He said that the process simply does not provide the scope for making choices or looking at multiple possibilities. Far less, it does not include 'winning' as the agenda.

Lastly, on choice, Roger said that when things are going great, when the industry you are in has natural momentum, you have it easy in not having to choose a playing field. Roger warned that this is early warning signal of impending trouble when you start meeting the first headwinds. By then, you will be led so far out into the sea, that you will be forced to make a deliberate choice.







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Outsourcing China: What's the reality



Mr. Qu Lingnian, Chairman, Beijing Association of Sourcing Service

n terms of absolute dollar amount, India is expanding the lead over China on offshore revenue. People in the industry agree that China is not going to pass India on offshore business anytime soon.

China is optimizing its industry structure, which expects to promote the annual growth of service sectors by at least 1 percent, that is, Chinese local market will be definitely the blue ocean for Chinese service providers.

The two countries possess language advantages as favorable offshore outsourcing destinations. India enjoys seamless integration with technology development in the U.S. and long history of collaborating with the American companies, while Philippe focuses on BPO, especially call center services. They both have their own specialty and

Although we believe China will be among the next top markets in the world, it takes much time for the request to mature. Additionally, the Chinese buyers lack management capability, which will also restrain the development.

Chinese service providers strive for the business transformation, and they don't own the industrial consulting competency, which make them fall behind American and Indian companies. That's why they target to improve the capability in off-shore market, and take the opportunity to accumulate the experience in serving local market.

Japan Business Tower @WTC Manesar

apan is fast emerging as one of India's major trading partners as economic ties between the two countries continues to improve. On the economic front, under the India-Japan Strategic and Global Partnership, the two sides have launched a Special Economic Partnership Initiative, which has several high-visibility flagship projects such as:

- Western Corridor of the Dedicated Freight Corridor to be partially funded by Japanese soft ODA loan,
- Delhi-Mumbai Industrial Corridor (DMIC), whose project development will be partially funded by Japan. The DMIC, projected to attract about \$92 billion in foreign investment, will be built around the DFC. A consortium of Japanese private sector companies is collaborating with the DMIC Development Corporation as well as the governments of the concerned states, in developing eco-friendly townships in the DMIC zone using Japan's best practices.

There has also been a change in how the managements of Japanese companies perceive Indian firms as they shift their focus from developed markets. They see diversification of country exposure and having alternative manufacturing bases as key to lowering risk. Also, while Japanese businesses continue to generate cash, there are minimal investment acquisition opportunities on the home front. With the cost of capital abysmally low (as little as 0.1%), it has become more viable for Japanese investors to buy assets in India.

Some facts on the India Japan economic relations:

■ A Comprehensive Economic Partnership Agree-

ment was signed by between Indian & Japanese governments covering more than 90% of the trade.

- Delhi-Mumbai Industrial Corridor is a mega infra-structure project of USD 100 billion with the 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.
- About half a dozen Japanese companies are building smart cities in India.
- India Japan trade leapt by 30% between Aug 2011 and March 2012. Currently, the bilateral trade stands at US\$ 10,363.72 million from in US\$ 4,193.41 million 1996-97

A case in point is the Japan Business Tower at WTC Manesar, a proactive initiative to serve Japanese companies operating in India. As a dedicated space, the tower will serve the Japanese Business Community looking forward to establish their operations here. The tower will have a much desired compatible business eco-system required by the Japanese organizations for their smooth operations. To ensure best quality services, a dedicated Japanese Information desk will be a key highlight of the centre which will act as a single point of contact for various vital services such as Relocation, Realty, Cross Cultural Training and Cultural Immersion for the Japanese community in India. The desk will also have a separate section for Translation Services from various languages to Japanese and vice-versa.

Malaysia Ready to Play Its 'Niche **Outsourcing' Strengths**



It has been another year of good growth for Malaysia, even as the international economic climate has been uncertain. Strong domestic demand, government investment, greater diversification and regional resilience have all played their part.

An intensive Economic Transformation Programme spearheaded by the government aims to improve Malaysia's human capital, develop a high-tech economy and incentivise advanced manufacturing.

Source: Oxford Business Group

he Asia Pacific countries have dominated the outsourcing scene for a while. Especially in a scenario where the European market is still reeling under the economic crisis and the US looks stagnant, the attractiveness of the APAC region is surely going to stay or become better.

Malaysia is one of the APAC countries that can't be ignored when we talk about promising locations. Surging domestic demand and greater government focus is expected to unfold new opportunities for outsourcing and shared services. Nearly 200 multinational companies have set up their shared services centers in Malaysia.

Although, the traditional favorites, India, China and Philippines are still pretty ahead in the low cost race, the services industry in Malaysia is expected to offer some surprises in terms of its niche service capabilities in areas like knowledge process outsourcing, finance and accounting and HRO.

The Oxford Business Group has stated in its Malaysia 2012 report that outsourcing is being seen as a growth industry in Malaysia under the government's Economic Transformation Programme (ETP). The country's Performance Management and Delivery Unit stated that the revenue for outsourcing firms in 2011 was around US \$273M in 2011, up 139 percent from the initial ETP target.





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