GREAT EXPECTATIONS

INSID*e*

Editorial

Focusing on issues facing the BPM and start-up space

We're back with another issue of NASSCOM Newsline, this time with some interesting insights on the Indian Business Processing Management (BPM) industry which is experiencing a fundamental shift in its landscape owing to the emergence of new technologies like Digital, Analytics, Automation, Cognitive technologies and fresh business models. The article talks about how organizations need to re-design their processes and leverage Digital technologies to deliver greater value to their customers.

In this issue, we also bring you news about the NASSCOM's 10,000 Start-ups Change Makers Summit powered by Google, a conference that will help fuel entrepreneurship. The event will attempt to narrow the gender divide by offering tech entrepreneurs, especially women Founders of start-ups, with opportunities for funding, incubation and accelerator support.

Indian tech start-ups remain the focus of yet another article which talks about the delegation of ten young IoT companies that are participating in Japan's biggest IT and electronics show. The delegation to Japan is expected to provide these start-ups with global exposure and establish India's position as a growing innovation and entrepreneurship hub.

We additionally bring you news about a major initiative that NASSCOM has launched in the BPM space which aims to deal with tech support telemarketing scams that are growing in number and threatening to erode the credibility and reputation of the industry. The association has launched a Consumer Interest Protection Task Force (CIPTF), a whistleblowing platform that will work to lower the reputational risk faced by the BPM industry and suggest ways to all stakeholders -including NASSCOM, the industry and government - in which the sector can protect consumer interests.

We hope you are taking time out to go through NASSCOM Newsline. We welcome your comments on the issues we have highlighted and urge you to share your views with us.

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EDITOR
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GREAT EXPECTATIONS

What Buyers really want from the Indian BPM industry

The Indian Business Processing Management (BPM) industry is in a state of flux and being catalyzed by several trends. There is a fundamental shift in the landscape, with the emergence of new technologies like Digital, Analytics, Automation, Cognitive technologies and fresh business models (solution providers, specialists and platform developers). While the key drivers of the global market are F&A, knowledge services and procurement, the domestic BPM industry is being spurred by government-run initiatives such as Digital India, as well as the retail and e-commerce verticals.

These advances however, can only be truly effective and impactful once enterprises have redesigned their processes to achieve desired business outcomes.

The fact is that opportunities to reshape BPM engagements to deliver much greater strategic value and outcome alignment have never been so strong. Ambitious service buyers are driving service providers to prove their value and their appetite to invest in them.

BPM companies have entered an era where there is real capability, and need to change how they run their businesses - from back office transactional processing through to the front office customer interaction.

There are tools and apps available to target and interpret meaningful data. Companies have been developing software solutions to automate and even robotize processes to mimic human tasks, like it has never happened before, and submerged themselves in a mobile

culture where all forms of business are conducted on all types of devices and interfaces.

Perhaps, even more importantly, Cloud-based platforms are being developed which allow organizations to share these capabilities, re-invent the way they run services and process transactions that require such a lesser amount of human intervention and oversight.

Hence, the onus is shifting to the capabilities of BPM/BPM talent to add value to their organizations that are insightful to help base decisions; that are creative, which help try new ways of doing things, or targeting new markets; that are innovative, where their organizations can find entirely new ways of competing, or developing unique products or services. Whether they work in finance, HR, marketing, procurement, IT, supply chain, the job of new age professionals working within the BPM realm, is to leverage Digital technologies and platforms effectively so that they can refocus their time adding value, because the need for people to sit around and fill in spreadsheets all day is being gradually eliminated. People need to do a lot more thinking, and less executing.

Interestingly, the biggest transformation that is taking place is within the buyer segment, which is becoming more discerning and demanding more from Indian BPM providers. Today, customers are looking to derive benefits from Automation but are unclear how to get there. These companies are therefore reaching out to their BPM providers to support them in this journey.

What buyers want?

According to a September, 2016 report by NASSCOM and HSF Research titled 'Making the leap from effective to strategic BPM', buyers and advisors want the following from their service providers:

Buyers want the benefits of Automation

Customers want Automation built into contracts. Around 38 percent of buyers interviewed as part of the research say that they want providers to invest in RPA partners, or proprietary RPA (34 percent).

Around 29 percent mention that they also want benefits of RPA in savings.

Buyers want providers to step up

Buyers and advisors believe that Automation, Analytics and Design Thinking is the way forward.

Almost a quarter (24 percent) want providers to share more client stories to showcase how new technology/ process improvement has worked.

Buyers want to go Digital

The research indicates that businesses are pinning operational hopes on Digital. Over a quarter (26 percent) state that Digital is the biggest help in achieving business goals,

Buyers want Process Improvement, Automation and Innovation/ Outcomes baked into deals

Over half of buyers (52 percent) select BPM providers for Process Improvement and 47 percent for process Automation skills. Although only the third most popular choice, over a third (37 percent) select providers based on their ability to contract for innovation and outcomes.

Buyers want future deals with differences

Almost half (48 percent) of the respondents say that new BPM contracts will be radically different in 2018.

More than a third of buyers want to move to a more open-ended and interactive style of contracting than the traditional RFI/RFP process (which however, is here to stay).

Responders state that Design Thinking, Automation, Innovation Centers and Cognitive Computing will drive provider selection by 2018. Design Thinking in fact, will become more important to BPM contracts by 2018, with almost half of respondents (49 percent) saying so. Automation is close behind with 48 percent of respondents.

Customers expect more from BPM deals by 2018 with a number of higher value services becoming more important selection criteria. They expect to base their BPM selection on Innovation Centers, Cognitive platforms and Data science skills.

Buyers want change in the BPM industry

Over a quarter of buyers (25 percent) think there needs to be more women in leadership roles. Advisors meanwhile, want more client stories (20 percent).

Clearly, there is a growing need for BPM service providers to scale to the next level, in answer to what their buyers need now.

Buyers want capabilities in their BPM service providers which they believe will drive their success

These include:

- Automation, Continuous Improvement and process excellence
- Process automation skills and solutions
- Ability to contract for innovations and outcomes
- Design thinking and solutioning skills
- Global network of delivery locations
- Analytics skills
- Proprietary technology tools and platforms
- Skills in third party SaaS platforms (Salesforce, Workd)
- Access to pools of entry level transactional labor
- Onsite account management and SMEs
- Access to local language skills
- Access to a wide network of alliances and partnerships

Overcoming the challenges

There are of course a few challenges they need to overcome before they can completely tune themselves to the requirements of customers. The biggest issue impacting buyers, service providers and advisors in the BPM/BPM industry today is the challenge of reorienting not only the skill-sets of delivery staff and leadership but also changing their mindsets and broadening their capabilities.

Training manpower in new technologies, for example, is an area they need to focus on. This needs to happen quickly so that the industry can increase its market share globally from the existing 38 percent and prevent other countries from claiming a share of the pie.

Suggestions for Change

What buyers need to do

They need to focus more on:

- Deliverable-based solutions
- Quality of true execution
- Replace the current BPM/ Outsourcing company leaders who have very limited experience in running the real businesses they serve (other than BPM/Outsourcing services) by newcomers who have been in Consulting or have run companies that BPM service providers deliver services to

What providers need to do

They need to focus on:

- Educating stakeholders on Collaborative Partnerships
- Building a partnership philosophy between buyers and themselves
- Working on RFP cycle times (just make a decision on a provider and spend the time on making the relationship work)

It is obvious then that BPM companies will need to attract the right people. In order to draw domain specialists, for instance, the industry itself will have to position a BPM career as a stellar one. Since services are now also being delivered from Tier 2, 3 locations in India, the manpower and infrastructure problems associated with these destinations will have to be dealt with.

The domestic industry too needs attention as it is still weak and needs to grow. The margins here will not be as high as in exports, but will be volume driven.

Furthermore, the BPM industry will have to expand its geographic spread, reducing its over reliance on the US market where the threat of protectionism looms large.

In a similar push, the industry will need to beef up its contributions from a range of verticals, going beyond BFSI and Telecom (which currently account for the highest share).

Provided the BPM industry moves in this direction, it will be able to achieve its revenue target of USD 54 billion by 2025, and USD 41 billion by 2020 at a CAGR of 8-9 percent.

The Big Shifts in the Indian BPM industry

- Mergers & Acquisitions are taking place, which are reorganizing the landscape
- Delivery Centers are moving to Tier 2, 3 locations
- Partnerships are being forged between Technology Providers and Service Providers to address the needs of clients
- There is a tech transition to RPA
- Autonomics is cutting expenditure by 15-25 percent while generating revenue four times faster
- Service providers are gaining a deeper understanding of the businesses of their customers
- The environment is witnessing tech advances in the direction of the Cloud, BPaaS, RPA, Big Data and Analytics, Advanced Interfaces (Voice and Touch0, Social Media)

BPM Snapshot

- The Indian BPM market reached a turnover of USD 28 billion in FY 2016
- While exports stood at USD 24 billion, the domestic marked accounted for USD 4 billion of the overall revenues
- The industry generated employment for 1.1 million people
- Indian BPM providers spread their reach to more than 80 offshore destinations
- There are more than 2500 BPM companies in operation
- They provide services in around 35-40 languages
- Customer Interaction Services (CIS) continues to have the largest share followed by F&A, Knowledge Services
- Traditional Geographies like USA & Europe continue to be main growth drivers but firms are also expanding to Continental Europe and APAC

NASSCOM gears up to curb fraudulent activities impacting BPM industry

Over the years, NASSCOM has been focusing intensively on ensuring that India remains a "trusted outsourcing destination" for companies that are placing their valuable data assets in the hands of the country's BPM players.

Tech support/telemarketing scams, especially those related to the BPM sector, and targeting unsuspecting customers, are growing globally. Such telemarketing frauds, often stretching across geographies, that misuse the Internet and global financial channels to access customer information, commit the fraud and transfer the illegitimate gains, are now originating in India as well. This clearly does not augur well for the USD 28 billion BPM industry, which has established credibility and trust in the global markets through honest efforts, is now faced with reputational hazards.

Taking cognizance of this emerging threat, NASSCOM has taken a key step to fix such fraudsters who are tarnishing the sterling reputation and image of the BPM industry. It has set up a Consumer Interest Protection Task

Force (CIPTF) in partnership with Ernst and Young, a global professional services organization, to understand the issue at hand and come up with recommendations which are holistic and can enhance consumer interest protection.

Suggestions for NASSCOM and government agencies

The Task Force, in a first-of-its-kind White Paper titled 'Dealing with Reputational Risk, Consumer protection task force recommendations', has outlined a set of dos for NASSCOM and government agencies.

It has advised these organizations to take a multipronged approach to fraud prevention, detection and response, which goes beyond BPM and IT. The aim is to create a robust consumer protection environment in India as well as globally, where fraudsters are brought to book and prosecuted.

The important issues highlighted by the White Paper include the following:

Protection

The White Paper has advised NASSCOM to:

- Develop a common code of practice for member companies that will delink unscrupulous elements from legitimate IT-BPM companies

- Include a section on security, privacy and ethical practices in the code of practice which lays down minimum standards that member companies will need to follow

- Encourage member companies to provide an annual self-assessment of their compliance of such code on their website and in other public documents

- Encourage member companies to implement a cyber security framework, chalking out various emerging cyber threats and protecting themselves from them

Detection and Reporting

The Task Force White Paper says that:

- Frauds and fraudulent companies can be detected faster if the incidents are reported promptly and to the relevant authorities

- NASSCOM companies should set up a whistleblowing mechanism where anyone can register/post complaints regarding fraudulent activities. It will lead to faster detection of frauds over a reliable channel. It suggests that the features of the whistleblowing mechanisms should include accessibility and governance

Investigation

The White Paper proposes that:

- The whistleblowing mechanism should be coupled with appropriate means to investigate the cases registered

- Considering the threats of fraudsters, the central government should set up an independent investigation unit that has the jurisdiction and power to coordinate between government agencies and departments

- This agency must ensure that investigations are promptly conducted and eventually lead to prosecution of guilty individuals or entities

- The government of India sets up an institutional mechanism to get periodic information from NASSCOM to identify the cities where cybercrime cells need to be set up and design a curriculum to train all police personnel in cybercrime. It is suggested that NASSCOM helps the government set up a special fast track court that adjudicates cyber crime cases

The Task Force is committed to preserve the reputation of Indian tech sector and strengthen the industry's leadership in the global market.

EVENT

Change Makers Summit 2016 to empower Female Founders

NASSCOM, which spearheads an industry that is more gender inclusive than any other sector in India, has always been calling for greater participation of women in the tech domain.

More recently, under its 10,000 Start-ups initiative, the effort has been to encourage women to take up the role of entrepreneurship and launch innovations in the area of software products and services.

The endeavor is bearing fruit, as is evident in the growing number of women Founders, especially within the start-up space. From receiving less than two percent applications from women Founders in the first year of the 10,000 Start-ups program, to having more than 10 percent of the total applications in 2016, the initiative has seen a great surge in women tech entrepreneurship.

Entrepreneurship in fact, has gone mainstream, spreading to every corner of the country. The aspirations of Indian women too have scaled and they are leaving no stone unturned to achieve their goals and build global start-ups from India. Interestingly, it is these women Founders who are bringing a change in paradigms and challenging the status quo that NASSCOM wants to showcase globally.

This growing trend of tech entrepreneurship will be on display at the 10,000 Start-ups Change Makers Summit powered by Google, to be held in October this year in Bengaluru. The event will offer women Founders crucial access to funding options via SME lending and the angel investor network, as well as accelerator and incubation support. Besides funding, select start-ups will be given opportunities related to mentoring and actionable coaching.

Women Founders, who are playing active roles and are substantial equity holders in product and growth stage ready start-ups, will be eligible to enroll themselves for the event.

The focus of the initiative is on facilitating promising start-ups through funding and taking them to the next level. The idea is to support the community of women currently working in technology who have stepped it up to fulfill their dream and pave the way for those wanting to enter the industry. The Summit will also highlight the efforts of women in the Google conducted pre-series workshops to build up the momentum for the Change Makers across India.

The Change Makers Summit is being rolled out by NASSCOM in partnership with SonderConnect-Powering Female Founders, India's leading platform for women entrepreneurs and the Center for Entrepreneurial Excellence (CEE).

The partner organizations have enabled over 50 businesses to receive 'no collateral' loans under various government schemes and run skills development programs that ensure jobs and self-employment. Additionally, they have recognized and showcased 12 selected Growth Stage start-ups from across India.

10,000 Start-ups Change Makers Summit: Benefits for start-ups

- Three selected start-ups will get SME loans up to Rs. 10 lakh each. CEE to facilitate the communication, business proposal creation, counseling and approval support
- Three selected start-ups will receive funding from Angel investors with loans up to Rs. 10 lakh each
- Ten start-ups will be selected into incubators
- Twelve start-ups will be selected for deep mentoring with the country's leading experts
- IBM will assist in providing anchor clients for those start-ups which are in the B2B space

Indian Start-ups to participate in CEATEC, Japan

In an effort to gear up its member companies, especially software product start-ups for new, on-the-horizon opportunities in emerging market segments and fresh markets, NASSCOM has been providing them with exposure to these domains.

It has been doing so by forging trade exchanges and partnerships with IT-BPM and tech associations the world over, taking delegations of member companies abroad and encouraging them to participate in global exhibitions and conclaves where they can learn about the future growth possibilities and showcase their own capabilities.

The latest in the line of such initiatives is the delegation of ten key Indian IoT (Internet of Things) start-ups that will participate in the Combined Exhibition of Advanced Technology (CEATEC), Japan's largest annual IT and Electronic exhibition and Conference. The arrangement is the result of a partnership between NASSCOM's Center of Excellence for IoT (CoE-IoT) and the Ministry of Economy, Trade and Industry (METI) of Japan. Together, the two chambers of commerce have selected the ten start-ups to attend the show from the hundreds that sent in their applications. They will be fully funded for their travel and stay, and get to see some of the best enterprises and businesses in Japan.

These outstanding start-ups are developing solutions in domains such as agriculture, logistics, and industrial automation and have scaled innovation to the next level.

Their participation in CEATEC could bring them global recognition and change the perception that the world has about Indian tech start-ups. The initiative overall, is additionally expected to strengthen the growing Japan-India cooperation in the field of emerging technologies.

NASSCOM, the Government of India and the Karnataka Government are working to create the right eco-system for the furtherance of IoT. These endeavors will help the country establish itself as a hotspot for innovation and technology in the near future.

Fast Facts

NASSCOM's CoE-IoT

- The Center of Excellence has been conducting programs and events alongside partners, to reach out to the IoT start-up community in India

- The CoE-IoT is enabling companies to achieve the goal of higher innovation and superior products

- In the past few months, it has connected with over 400 start-ups of which 65 were nominated for the 25 Best Innovative IoT start-ups listing. Finally, top 25 companies were identified and from them, ten were selected to display their products in Japan

Attending Ceatec In Japan

- ✓ Flutura Business Solutions Pvt. Ltd.
- ✓ Linkeddots Engineering Solutions Pvt. Ltd.
- ✓ LOCANIX
- ✓ Preva Systems Pvt Ltd
- ✓ SenseGiz
- ✓ Srishti ESDM Pvt Ltd
- ✓ Stesalit Systems Ltd
- ✓ TartanSense
- ✓ Teevr Data Pvt Ltd
- ✓ Yuktix Technologies

IoT poised for exponential growth
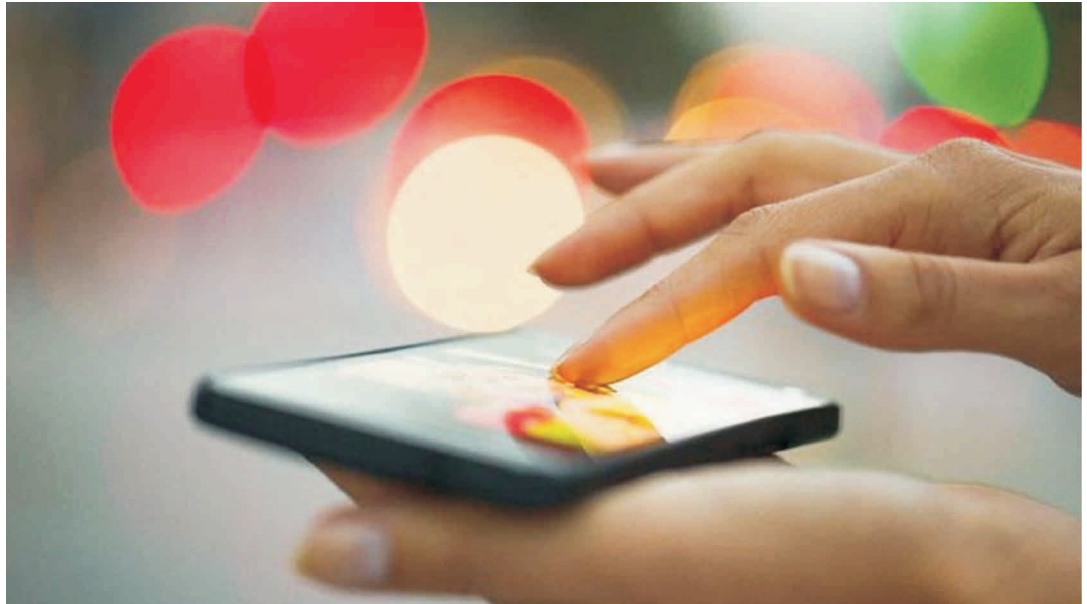
The Internet of Things (IoT) revolution is sweeping the world, with IoT gaining traction over the last decade, and gaining support from a strong ecosystem of IoT industry players, associations as well as academia. In fact, and in order to maximize the benefits from IoT, many consortiums of companies and industry bodies have drafted technology and regulatory protocols to promote standardization and uniformity.

According to studies and research conducted by analyst firm Deloitte and NASSCOM, currently, there are several technological, economic and behavioral changes that are driving the rise and adoption of IoT globally. These include:

- The reducing costs of sensors, connectivity and processing as well as device proliferation
- Rise of cloud computing
- Adoption of Ipv6
- Higher processing speeds and rise in cost savings and revenues
- Pervasive connectivity and rise of the connected consumer

Based on these trends, Deloitte says, IoT is poised for exponential growth, with the number of connected devices expected to grow by 5.5x to reach 20.8 billion and revenues projected to increase by 3x, reaching USD 3 trillion by 2020. Consumer units are expected to form a significant share (around 65 percent at USD 13.5 billion) of the total IoT installed base by 2020.

India's IoT market

Deloitte reports indicate that while India is still in a nascent stage of IoT development, with the market at USD 5.6 billion and 200 million connected units in 2016, the market is expected to rise to USD 15 billion, with 2.7 billion units by 2020.

As of now, the IoT ecosystem in India is characterized and being shaped by the following:

- 120 organizations playing across the value chain including hardware vendors, application vendors, network operators and system integrators. It will however be application vendors that will garner the largest share - more than 50 percent - of the Indian IoT market by 2020
- Investments worth more than USD 60 million that have already been made in start-ups offering innovative IoT solutions since 2014

- The USD one billion that the Indian government is earmarking for its 100 Smart Cities initiative for which IoT will be the key enabler

- Demand for Industrial and consumer applications - Adoption of consumer IoT however, will be slower due to the cost of IoT devices and security as well as privacy concerns of consumers

- Start-ups offering innovative solutions which are being supported by various incubators and accelerators with funding, mentorship and networking opportunities

- Verticals such as Utilities, Manufacturing, Transportation and Logistics (T&L), Automotives and Healthcare

- The rise of Utilities, which is expected to be the highest adaptor owing to the government of India's focus on building Smart Cities, the e-commerce boom and regulatory changes such as the GST

- The rise of tech savvy consumers along with increasing smartphone and mobile Internet penetration

Challenges facing IoT in India

Despite the presence of numerous enablers, various challenges are currently impeding IoT growth. This is owing to the problems associated with IoT devices and other factors such as:

- Low consumer awareness about the benefits of IoT apps in their daily lives

- Absence of end-to-end encryption

- High power consumption and high price perception of IoT technology

- Lack of seamless interoperability and scalability

- Lack of and unreliable network connectivity and Internet access

- Lack of uniform security and regional standards in apps, architectures and reference models

- Privacy of consumer data as IoT devices are designed to communicate and relay data to external partners

- Lack of compelling use-cases and viable business models

- Ambiguous RoI

It is important to understand therefore, that India will need to build on certain core strengths in order to gain a global competitive edge in IoT. Support has already come for the IoT industry from the government of India that has announced a draft policy on IoT, which aims to catalyze R&D effort, enhance funding for IoT start-ups and set up nodal organizations for standards setting.

However, start-ups too will need to step up, focusing on building innovative IoT solutions and taking the support of accelerators and incubators.

The country furthermore, will require a technology framework with capabilities in sensor technology, network infrastructure, standards and augmented intelligence.

Also, cross-functional skills and specialized training will be needed to enable successful deployment of IoT by the workforce.

Connectivity
Lack of connectivity and internet access can be a major impediment to the growth of IoT in India

Privacy and Encryption
IoT devices are designed to be able to communicate and relay data to external partners, thus creating a risk to privacy of data

Awareness
Consumers are not necessarily aware of the benefits of IoT applications in day-to-day life

Challenges existing in the Indian IoT ecosystem

Compelling use-cases and viable business models
Developing new products can be challenging, especially when profit is dependent on scalability of solutions

Cost of technology
High cost of IoT technology can be a deterrent in its widespread adoption

The need for collaboration among IoT stakeholders

Finally, and most importantly, all the key stakeholders, including the government, industry and NASSCOM, will have to collaborate to ensure that the country capitalizes on the IoT opportunity.

The industry players for instance, will need to evolve business models, increase usability of IoT-based systems and applications, improve technology and devices, upgrade or replace legacy systems and ensure integrity of data.

On its part, the government will need to incentivize industry players and increase network and communication efficiency.

NASSCOM, meanwhile, will have to continue nurturing the industry's thought process and IoT innovation ecosystem, liaise with global associations, influence policy making with regard to IoT, and increase awareness about it to spur adoption. NASSCOM is already pushing for greater investment and R&D in IoT, more investment in skills development and the creation of standards for Interoperability.

Both the Global and India IoT market are expected to grow significantly by 2020

Globally, the installed base of connected units is expected to grow from 3.8 billion in 2014 to 20.8 billion in 2020 ...

Global IoT Units (billion)

- 3.8 bn — 2014
- 20.8 bn — 2020
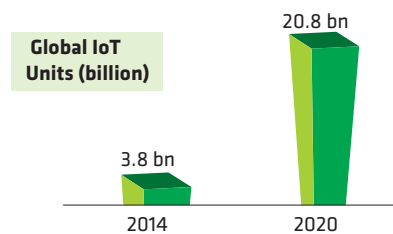
... with IoT market increasing from USD 0.9 trillion to USD 3 trillion, over the same time period

Global IoT Market (USD trillion)

- USD 0.9 tn — 2014
- USD 3 tn — 2020
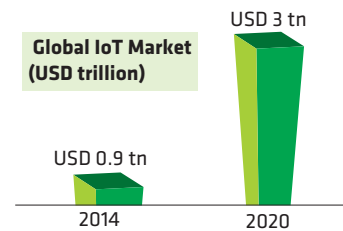
The number of connected units in India is expected to grow from 200 million in 2016 to 2.7 billion in 2020 ...

India IoT Units (billion)

- 0.2 bn — 2016
- 2.7 bn — 2020
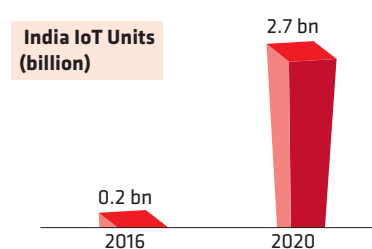
... with the IoT market expected to increase from USD 5.6 billion in 2016 to USD 15 billion in 2020

India IoT Market (USD billion)

- USD 5.6 bn — 2016
- USD 15 bn — 2020
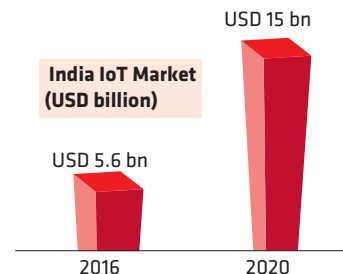
Source: Deloitte Analysis, Industry reports

IoT Case Studies in India

Here's a snapshot of the solutions that some Indian companies have developed to provide customers with IoT benefits:

Leading Real Estate company

Has developed a Smart Energy Management solution with connected meters and automated systems to reduce costs and to monitor energy consumption patterns

Leading telecom operator

Has developed an end-to-end solution to track people and moving/fixed assets for the enterprise segment

Leading seed company

Has developed a smart farming solution involving the detection of plant growth anomalies, yield predictability, etc. to monitor farms

Leading automotive OEM

Has developed a connected car solution, encompassing a dashboard and applications for a car to enable secure communication between the car and mobile customers. This also helps provide health diagnostics data for preventive maintenance of cars

The Times of India
Sep 23, 2016

'We are no longer order-takers'

Shilpa Phadnis & Avik Das | TNN

Bengaluru: Keshav Murugesh, group CEO of WNS Global Services and chairman of the Nasscom BPM Council, says he is not worried about Brexit. In an interview with TOI, Murugesh talks about how BPM firms are transforming themselves into strategic partners of their clients. Excerpts:

ONE-ON-ONE
Keshav Murugesh
CHAIRMAN, NASSCOM BPM COUNCIL

Do you see a Brexit effect on BPM firms?

tech, robotics, simple auto-

companies are performing. For them, BPM is a strategic tool. If you have to save money, and if you understand what the customer is telling you about leveraging analytics, you have to come to me.

Do you think deploying AI to support workloads is still some distance away for the sector?
Yes. The BPM sector is still at a very nascent stage. Many well-known traditional brands have only just started to dip their toes into out-

pricing model for newly marrieds compared to singles or students. We were able to do the user profiling and charge based on their usage.

What are some of the initiatives you've taken to create industry-ready talent?
We have created qualification packs – 80 hours additional course content. We have started with finance and accounting, we take these packs and add on top of the traditional BCom de-
WNS did a strategic amme with one of th sities out of Del we co-created a t curriculum. We t l for s year v n en uant m em rog npu

Mint
Sep 19, 2016

Impact of decline in pound's value will be felt for a while: Nasscom

BY SHEREEN BHAN
CNBC-TV18

Nasscom president R. Chandrashekhar says the Indian information technology industry is facing a "watershed" moment. He says the days of 20%-plus margin growth are over for the IT sector and Nasscom may have to lower its growth forecast of 10-12% for the current year. Edited excerpts from an interview:

Let's start with the ...

The Economic Times
Sep 29, 2016

Recessions Destroy Jobs, not Robots

N NARASIMHA MURTHY

ET Roundtable

Last week, an HfS Research survey of 340 execs in the BPM industry said the sector was likely to change majorly over the next 18 months – driven by automation and analytics. At the Nasscom BPM Summit 2016, Nasscom chief R Chandrashekhar, HfS Reasearch CEO Phil Fersht, WNS CEO Keshav Murgesh and Quattro chairman Raman Roy sat down with ET's TV Mahalingam to discuss what lies ahead. Edited excerpts:

Phil, what did you find were the most interesting aspects of the HfS survey?

Phil Fersht: We are going through a new wave where companies are trying to figure out how to adopt technology models. A lot of clients are under pressure to be seen to be evaluating it and figuring it out having a strategy, but the reality is – what came out of the study is – clients aren't viewing BPM providers strategically enough. Around 50% of the clients are not viewing their BPM provider as a strategic partner to do things like cognitive, a lot of automation, and a lot of digital. They are seeing them more as helping them do it, than doing it themselves.

As service providers, what do you make of this rather interesting reading?

Raman Roy: I think what is happening is we are moving to an area new even to our customers. So, our customers have no clue how that analytic piece is to be done, how that robotics pi-
to be done

From left: HfS Reasearch CEO Phil Fersht, Quattro chairman Raman Roy, WNS CEO Keshav Murgesh and Nasscom president R Chandrashekhar at the roundtable discussion in Bengaluru last Thursday

big threat to hit this industry. Someone said it is recession that destroys jobs not robots.

Chandrashekhar: You also asked a question on the job which I would like to answer to. See, all of this plays out at very macro level of the industry and is something we have brought out in Perspective 2025. The first $100 billion, the industry ended up employing over 3.5 million people. The second $100 billion, the estimate is now going to be 1.2 million, which is half the num' doing the same

-- it is bright if you can do these things, scary if you can't. The IT industry in general has pivoted on many occasions. So, they are good at recognising pivots when they are needed and doing it when it is needed. And we are confident that will happen in this case as well.

Do you think we are doing enough to make the switch for a more strategic engage--

ets sold. And, what used to take six months is done now in two hours – we now tell them based on algorithms running where is the revenue loss and which travel agencies should they now be deputing.

There is a lot of worry around the impact of automation on jobs in the BPM

The Hindu Business Line
Sep 23, 2016

Digitalisation could rake in $50 b for Indian BPO sector

OUR BUREAU
Bengaluru, September 22

Increased au and digitalisation by expected to PO sector n reven Address sscom nagem alur he he th to seys tr br

Chandrashekhar. In line with this, Nasscom's BPM Council will set up a centre of excellence in the area of data sciences and is in luating the loc-

Business Standard
Sep 16, 2016

Indian BPM growing 8-9% yearly: Nasscom

KIRAN RATHEE
New Delhi, 15 September

The total addressable market for the Indian business process management (BPM) sector is expected to be $54 billion by 2025, growing at eight to nine per cent yearly, says Nasscom, the ap- body of the information technology

Over the ne al BPM s to seven grow six h $233

NASSCOM TOP 10 BPM EXPORTERS IN FY16

Rank	Company
1	Genpact
2	Tata Consultancy Services
3	Wipro BPO
4	Infosys BPO
5	WNS Global Services (P)
6	Firstsource Solutions
7	Hinduja Global Solutions
8	EXL
9	Aegis
10	HCL Technolo (Busines

The Times of India
Sep 23, 2016

BPM biz to hit $50bn in 4 yrs: Nasscom

TIMES NEWS NETWORK

Bengaluru: The Indian business process management (BPM) industry is expected to grow to $50 billion in the next four years, up from $26 billion in 2016, helped by greater adoption of analytics, digital technology and automation, industry body Nasscom said.

The sector, which has grown about 17 times in India, has past five years in India, has 2,500 companies and employs close to 1.1 million, covering around 40 languages as well.

37.6% share in the global BPM offshoring market, mainly due to low operating cost. America and Europe continue to be the main growth drivers, but Asia-Pacific too is beginning to offer opportunities.

$26BN IN 2016

"We are seeing a lot more focus on advanced analytics, and robotics-processed automa tion not only in new areas, bu also in the traditional area and what is interesting is, w are seeing that existing clien

are also looking at spending in new areas, while new clients are imbibing the new models," Nasscom BPM Council chairman Keshav Murugesh said on Thursday.

Aegis CEO Sandip Sen sa d "Almost 50% of the BPM bu nesh provi

body said India needs to train its employable graduates in modern skill sets that will help them adapt to the change in demand. Raman Roy, MD of Quattro Global Services, said, "In most cases, the professors at the institutes have no clue as to what to teach. We need to train the trainers before they teach

The Hindu Business Line
Sep 30, 2016

'Gujarat can be catalyst in building ICT ecosystem'

State has missed outsourcing wave, says Nasscom chief

OUR BUREAU
Ahmedabad, September 29

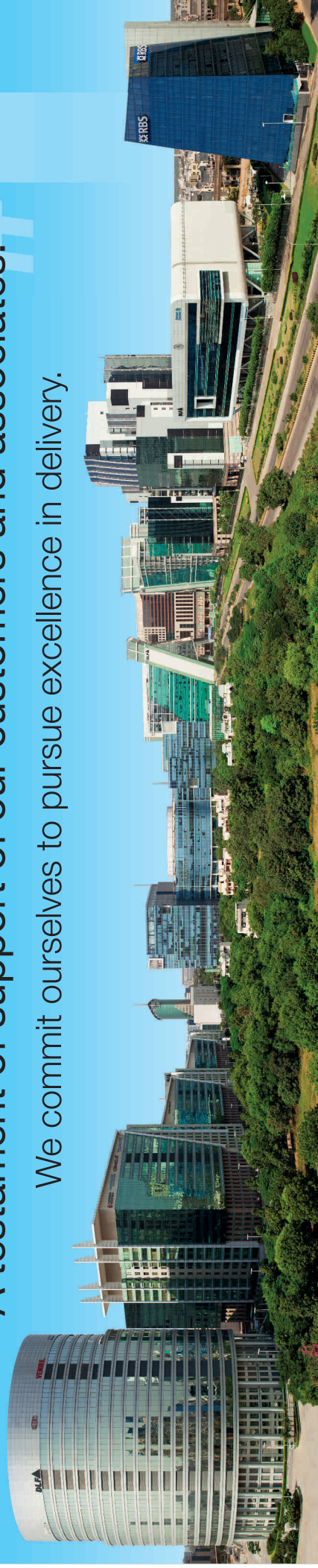In order to boost innovation and entrepreneurship in information and Communication Technology (ICT), the State can play a catalyst role in building the ecosystem, informed chief of the National Association of Software & Services Companies (Nasscom) here.

Referring to the dismal participation of Gujarat-based entrepreneurs in the ICT field, CP Gurnani, Chairman of Nasscom, mentioned that the State had missed the wave of outsourcing, which flourished the IT industry in the country.

CP Gurnani

"The next wave is of entrepreneurship. We need to look at how do we create the waves of design innovation and transformation.
"If Nasscom and Government of Gujarat collaborate for a participation and set up Centres of Excellence at institutions to address this need with the Gujarat government becoming a catalyst, we could have a huge way forward," said Gurnani, who was

in town for the Nasscom executive council meeting on Friday. Highlighting the potential of the IT and technology sector of India, Gurnani mentioned that technology exports have gone up to $150 billion, and the same is likely to grow to $350 billion by 2025.

Gurnani, also Managing Director and CEO of Tech Mahindra, will meet Gujarat Chief Minister Vijay Rupani on Friday to discuss the skill-gap issues in the ICT field in the State.

Outsourcing destination

"Gujarat never became an outsourcing destination. We have about 47-50 SMEs from Gujarat vibrant companies. But none of them is of the scale of the likes of HCLs or Adobes. Earlier, the required

infrastructure wasn't there, but now the State is ready and hence we need to look forward," he said, adding that in the Nasscom's 10,000 Startups goal, Gujarat has a potential to have about 4,000 start-ups.

New centres

According to Gurnani, the State government and Nasscom will explore to set up COEs in the sectors of Petro-chemicals or pharmaceuticals.

Meanwhile, Gujarat Electronics and Software Industries Association (GESIA), Gujarat's only State-level body representing the ICT industry, on Thursday awarded 10 ICT companies from the State at its ninth edition of 'Annual Awards for Excellence in ICT 2016'.

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LEED GOLD Certification
14 DLF Office Buildings in Gurgaon
US Green Building Council
2014-15

Sword of Honour & 5 Star Rating
DLF Offices, Gurgaon
British Safety Council
2014-15

Best Commercial Project in NCR
DLF iQ (Bldg #14), Gurgaon
CNBC Awaaz Real Estate Awards
2013-14

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