NASSCOM Emerge-Product Forum

NASSCOM
EMERGE
50
2012

THE GROUP OF

EMERGENTS

Rising Stars
of Indian IT Industry

Index

Message

A majority of the offerings from these new-age ventures are focused on spaces such as mobile, cloud, social media and analytics. These young oraganisations have also not shied away from 'tough' markets.

With a 789 per cent growth in product start-ups and a 2173 per cent increase in funded product ventures in the last three years, the Indian technology product economy is on an unprecedented growth trajectory. A majority of the offerings from these new-age ventures are focused on spaces such as mobile, cloud, social media and analytics. This diversity is a welcome indication of the increasing depth of India's fledgling product ecosystem. These young organisations have also not shied away from 'tough' markets.

'NASSCOM Emerge 50 Awards' programme, in its fourth year now, annually identifies, showcases and supports Top 50 high-potential emerging organisations in the country, that are redefining the benchmarks of excellence for the technology industry. The list is a bellwether for the direction in which these innovative emerging organisations in the country are headed.

The enthusiasm of entrepreneurs every year has been overwhelming. The nominations in this year were characterised by a mixture of burgeoning success stories and promising start-ups that are coming up with exciting new solutions; ones to watch for the future. The assessment was based on number of parameters including financials, growth, market differentiators, customers, market visibility, innovation impact, scalability to name a few. Our esteemed Jury members met the shortlisted organisations in person in Delhi, Bangalore and Mumbai to arrive at the list of Emerge 50 and the 'League of 10'.

In the start-up category, it was noted that funding ecosystems have strengthened, with more than 35 per cent of the firms having received funding from VC, angel, seed or government sources.

In the growth category, we found that, while VC funded organistions grew by over 75 per cent CAGR over the last three years, other firms grew by about 61 per cent CAGR.

In the Innovation category, we observed, 40 per cent companies are serving large conglomerates and MNCs, delivering significant impact on reducing costs and enhancing productivity, while revenue growth also emerged as an impact of innovation.

This growing tribe of entrepreneurs, with its innovative solutions, is slowly but surely altering the country's IT landscape. Heartiest congratulations to all the winners on this spectacular achievement and our sincere appreciation for helping take the industry to the next level of growth.

Som Mittal
President, NASSCOM

Krishnakumar Natarajan
CEO & MD – MindTree
Chair – NASSCOM Emerge-Product Forum

Anil Bakht
Co-Founder & Director,
Eastern Software Systems
Chair – Emerge 50 Awards

Emerge "League of 10"

Joining the Dots

iKen Solutions
on intelligent data analysis for a delightful user experience

So many channels on air but nothing to watch! Sounds familiar? TV networks, telcom, Value Added Services (VAS) platforms and eCommerce websites are bursting with new content and products, but content/product discovery is a huge challenge for both buyers and sellers. This is the problem Mumbai-based, IIT Bombay research spin-off, iKen Solutions has set out to solve.

Data that Delivers Intelligence for Custom Targeting

Standard 'silo' analytics systems look at what is being sold, when and where it is being sold. "Joining the dots requires intelligent data analysis and that's the job that iKen promises to take charge of with its 'Mooga' analytics platform. 'Mooga' also looks at who is buying the product/service and uses this data to create a personalised user experience.

However, a big differentiator is also in the way the analysis is operationalised. Insights are captured effectively and executed upon", points out Goel.

The organisation has a sharp focus on telecom, media and internet organisations (TMI). iKen has followed the partnership go-to-market model and works with large solution providers such as HCL, TCS and Comviva that typically bundle the iKen platform as a part of their solution.

Unmatched Customer Delight

For a large Indian telcom, iKen has delivered a 180 per cent increase in sales conversions. The organisation is also currently co-innovating with HCL to develop a 'Smart TV' platform that will guide set-top box users on available programs and help them discover new shows.

Solutions with a Pedigree

Unlike a lot of other players in the VAS segment, iKen positions itself as a technology play. The organisation was backed by India Innovation Fund.

For serial entrepreneur Goel, iKen is the third organisation that he has successfully taken to the growth path. With a strong technical team and several delighted marquee customers, Goel is all set to hit the ball out of the park with this one.

Organisation
iKen Solutions

Play space
Intelligent analytics for telecom, media and technology companies

It all started in
2008

At the helm
Siddharth Goel, Prof. Rajendra Sonar

Winning gameplay
Artificial intelligence based consumer analytics that helps customers deliver highly personalised user experiences

High point
Helping one of India's largest telcoms hugely improve revenue traction for a key VAS service

Vizury Interactive
on aiming for number one position in non-traditional markets

Named after the Swahili word for 'good', Bengaluru-based Vizury Interactive is focused on helping organisations replicate and complete offline customer engagement cycles in the digital world.

The Play

Organisations that are investing in digital platforms such as websites, communities, blogs and apps generate a lot of customer engagement data. Vizury is helping such organisations realise the full value of their digital assets.

Take for instance what Vizury is doing for Virgin Australia. The website receives around 200,000 unique visitors each day, each exhibiting different needs and behaviour. Vizury's platform consolidates this data/behaviour and uses it to target them with personalised ads when the visitor moves on to other websites.

Vizury calls its platform a Visitor Relationship Management (VRM) system. By spotlighting specific actionable intelligence that it also acts upon through targeted advertising, the VRM platform seeks to convert prospects into customers and customers into repeat buyers. "The system uses anonymous cookies that don't contain any personally assignable data. Plus every ad banner has an 'opt-out' link," explains Chetan Kulkarni, Co-founder and CEO of Vizury Interactive.

The Road Less Travelled

Unusually for a start-up, Vizury has ventured forth into non-traditional markets such as China and Brazil. "After two or three years, we realised that for the kind of IP we were building, the market outside India was much bigger," says Kulkarni. The organisation picked up a few clients in China through an India anchored sales exercise before setting up base in China. The route to Brazil was chartered with the help of a European partner. Says Kulkarni, "Instead of heading for the US to become the fourth, fifth or sixth company in this space there (Vizury competes with the likes of Google), we would rather go to a new market and be number one there."

For this first time entrepreneur, bitten by the start-up bug in 2008, success has come steadily; clearly the bet on digital data is paying off!

Organisation
Vizury Interactive

Play space
Digital CRM

It all started in
2008

At the helm
Chetan Kulkarni, Gourav Chindlur and Vikram Nayak

Winning gameplay
Helping organisations realise the full value of their digital assets through Vizury's Visitor Relationship Management (VRM) system

High point
Taking the path less travelled by successfully tapping markets such as China and Brazil

One Country, Many Voices

Reverie Language Technologies
attempts at bridging the digital language divide

"Two-thirds of the cellphone users in India are unable to use English content/applications and as a result, only use their phones for voice calls," points out Reverie's CEO and co-founder Arvind Pani. This is bound to reflect adversely on the Value Added Services (VAS) income earned by Indian telcos.

Any marketer worth his salt would see the gap here, but it takes vision of another kind to dream up a solution that bridges it.

For four years now, Arvind Pani and his co-founders have been on a mission to make content availability a little more democratic for regional languages.

Three-Pronged Attack

Reverie has worked extensively to resolve the key issues constraining the spread of regional language applications and content including – resolving font and display issues, harnessing transliteration, text to speech, optical character recognition and translation solutions while electronic touch screen keypads with predictive support have helped resolve issues around interactivity.

The Horizontal Play

The organisation already supports 32 major languages of the world and has embarked on three main horizontal partnerships. It works with device manufacturers such as Micromax and Intex to embed its language software. To proliferate its platform, Reverie also licences an SDK to app developers.

Reverie has tasted commercial success for its SDK and OEM offerings with six customers including tablet maker Datawind and navigation organisation 'Map myIndia' signing up. Reverie's software has been included in a reference design by chip maker Qualcomm.

The Passionate Trio

For Pani, entrepreneurship was a natural choice when climbing the corporate ladder no longer appealed after an eight year stint at Intel. Vivekananda Pani (one of his co-founders also being his very own sibling) and S K Mohanty joined in with 40+ years of expertise in the language domain.

Reverie has been entirely bootstrapped by the trio, aided by Qualcomm prize money won in 2011 and angel investor infusions.

Organisation
Reverie Language Technologies

Play space
Multilingual platforms for mobile devices

It all started in
2009

At the helm
Arvind Pani, Vivekananda Pani and S K Mohanty

Winning gameplay
Making digital content available for regional language speakers

High point
Winning the Qualcomm 'Q' Prize for innovation in 2011

Marrying Creativity with Technology

KNOLSKAPE
experience | learn | thrive

Knolskape

on building India's largest simulation training programs

What happens when your two passions in life are technology and creativity? Bitten by the start-up bug, while trying to put together a business idea at INSEAD during his MBA, Jayaraman was struck by the concept of 'active learning' where story telling, education and technology can be merged to develop a simulated case study environment that provides instantaneous feedback. Knolskape was born.

"Doctors have cadavers and pilots have flight simulators. In the same way, managers need to have a simulated learning environment. One cannot become a good manager by passively watching powerpoint slides. We help the user experience a virtual storyline and make decisions in a safe environment – it is like bringing case studies to life where the learner is the protagonist," says Jayaraman.

Knolskape was incubated at INSEAD and is boot strapped by Jayaraman. A first generation entrepreneur, Jayaraman says that he has received full support and encouragement from his family.

The idea of business simulations is not new, he explains. Knolskape, however goes deeper into the business domain. Using sophisticated business modelling, it has been able to create simulations with adaptive, rich, life-like scenarios to enhance learning. As opposed to a desktop model, Knolskape offers a cloud-based service. It also focuses on new form factors, the mobile phone and tablets.

While business schools focus on case studies, corporates use Knolskape's products for their corporate training programs. "Initially some organisations had apprehensions about training using games but the acceptance has grown phenomenally. They see that the engagement level and learning is much deeper," notes Jayaraman.

Over the past four years Knolskape has gained clients across South East Asia, India, Middle East and the U.S. Jayaraman sees tremendous opportunity for further growth. Today, simulation methods are regarded as a unique approach to management training and assessment programs, and going forward, he opines, these methods will become the norm.

Organisation
Knolskape

Play space
Business simulation

It all started in
2008

At the helm
Rajiv Jayaraman

Winning gameplay
Using sophisticated business modeling to create simulations with adaptive, rich, life-like scenarios that enhance hands-on learning

High point
Creating a global base of customers including Fortune 500 companies and some of the world's best business schools

Innovation Powered Growth

mCarbon Tech Innovation
on value creation for clients

Nothing energises a young company more than bagging a customer, which is one of the largest players in the industry it operates in. Mobile Value Added Service (VAS) provider, mCarbon Tech Innovation acquired its first customer, Airtel, within three months of its launch when it signed a three-year deal with the telecom giant. According to Rajesh Razdan, co-founder of mCarbon, the Airtel deal was a 'real' validation of their value proposition at a time when the launch of the actual product was due 4-5 months later.

Enhancing Customer Loyalty

mCarbon was recently recognised by Airtel as its innovation partner for this service. The flagship platform Greenroom is a network app store that enables the big telecom operators launch network marketing services such as call-management, which blocks unwanted calls on mobiles. Another mCarbon solution is the Airtel 'Gifting Service' for prepaid mobile customers that allows friends on the Airtel network to send and receive talk-time to each other - and even give away mobile services' gift packs with or without a special occasion. Another popular service is the SMS SOS app that allows customers to send an emergency 'call me back' SMS alert to a friend, even when prepaid balance is negative.

The Greenroom platform also enables independent application developers to develop apps on top of the platform. The strong analytics framework analyses customer data to enable telecom operators offer customised services to end customers.

The Journey

Razdan and Brij Mohan Mahendru, both first generation entrepreneurs founded mCarbon in 2007. The organisation was set up with the life savings of the founders and an angel investor, but institutional funding followed soon after. Canaan Partners invested USD 5 million in the firm in early 2009.

Moving Overseas

With the top five telecom operators in India as its customers, the organisation has now ventured into overseas markets. With innovative solutions and a strong value proposition, for mCarbon, the world is its oyster.

Organisation
mCarbon Tech Innovation

Play space
Mobile VAS

It all started in
2007

At the helm
Rajesh Razdan and Brij Mohan Mahendru

Winning gameplay
Building a network app store that helps telcos tap VAS revenues

High point
Acquiring telecom behemoth Airtel as a marquee customer

Accelerating the Product Puzzle

Techcello
on building product vs services organisations, now and then!

"The DNA of a software product organisation is completely different from a software services organisation," opines Shankar Krishnamoorthy, Co-founder of Chennai-based Asteor Software.

Krishnamoorthy along with his friends and engineering college mates Gowri Shankar Subramanian and Bhoo Thirumalai co-founded a software services company, Aspire Systems back in 1998. Twelve years down the lane, they spun off Asteor Software, a software products organisation. "The entire philosophy while developing products is different. Developing the features may take time, but these will be potentially used by multiple customers. One needs to look at multiple angles including user experience, engineering, marketability and more while developing products," explains Krishnamoorthy.

Asteor Software's flagship product TechCello provides a productised engineering stack for software product organisations that helps reduce the time-to-market specially for SaaS products that need lot of complex engineering. Typically, 30-40 per cent of the time goes in building these engineering layers before the team can start building business layers. Often the sophisticated technical expertise required to develop the engineering layers is also not available. TechCello helps cut the software development time and effort and makes it easy to build cloud ready, multi-tenant SaaS software products and applications," says Krishnamoorthy.

Early Years

Describing their entrepreneurship journey, Krishnamoorthy says that the pressure often came from seeing other friends quickly move up the traditional corporate ladder and acquire material possessions. We knew we could always fall back on the corporate world, should the going gets tough. Fortunately we did not have to," recalls Shankar.

Although funding is not a major issue these days, getting the right engineering talent is. While Asteor targets the global software market, all of Asteor's customers thus far have been acquired purely through the social media and direct marketing efforts of the marketing team which is based out of Thanjavur.

Moving up the Product Stack

The organisation has already launched another product, Synergita. Built on top of TechCello, Synergita is a cloud-based flexible HR and performance management software.

Organisation
Techcello

Play space
Engineering stack for software product organisations

It all started in
2010

At the helm
Shankar Krishnamoorthy, Gowri Shankar Subramanian and Bhoo Thirumalai

Winning gameplay
Helping software product organisations compress new product roll outs by providing ready-built engineering stacks

High point
Building a global business, based out of India

Riding the Gaming Wave

Rolocule Games
on chasing dreams

Most of us crave for a job that can be fun and high-paying at the same time, however, only a few get lucky. With the Apple App Store creating waves in the gaming ecosystem, Rohit Gupta, decided to take a bet on developing games for the iPhone rather than for consoles.

Chasing a Dream

Gupta worked with Electronic Arts (EA) in California, one of the world's leading gaming organisations, and was a part of the team that developed the best-selling computer game, 'The Sims 3'. This however, did not satisfy his creative urges and after a few years Gupta returned to India to start Rolocule.

Organisation
Rolocule Games

Play space
Game development for mobile devices

It all started in
2009

At the helm
Rohit Gupta

Winning gameplay
Creating high-end console-like interactive entertainment software for next-gen platforms such as tablets and smartphones

High point
Winning recognition on the iTunes store and being chosen for the 'People's Choice Award' at the 8th IMGA awards at the Mobile World Congress 2012, Barcelona, Spain

Turning the Corner

Rolocule focuses on creating high-end console-like interactive entertainment software for next-gen platforms such as tablets and smartphones.

The first game, Tough Squash, a squash game app in 2009, created a reasonable buzz and some revenues as well. However, the turning point for Rolocule Games came in 2010, when it released Super Badminton, the world's first badminton video game for iPhone and later for iPad. Apple recommended the game to its customers and highlighted it in their 'newsworthy' category. The organisation broke even within a week.

In 2011, Rolocule developed a tennis game, Flick Tennis, which has had more than 0.6 million downloads. It won the 'People's Choice Award' at the Eigth IMGA Awards ceremony held in the Mobile World Congress 2012 in Spain.

In-depth research and analysis is what differentiates Rolocule's approach to developing games. "We have done in-depth research on understanding what makes playing tennis on tablets and smartphones different," says Anuj Tandon, COO, Rolocule

Going forward, Rolocule will stay focused on developing games that stand out, without compromising on quality. The organisation already has three games in production. While the computer games market is very crowded, Rolocule's young promoters remain unfazed, confident that their unique world-class games will help them successfully ride the gaming wave.

Making the Customer Connection Happen

Knowlarity Communications
on biting into cloud telephony in India

Cloud telephony start-up Knowlarity Communications offers a distributed and extensible telephony platform productised as a cloud PBX, cloud fax solution, toll free and IVR services. "We have invented the category in India," points out CEO Ambarish Gupta.

Making the Right Call

The cloud PBX offers small and medium enterprises a configurable 'soft' PBX solution that obviates the need for any PBX hardware investment. A web-based UI can be used to set up the 'tree and branch' structure of the IVR and to pre-set rules for forwarding calls to different mobile/landline numbers based on the caller's requirement.

A key USP of the platform is the level of detail captured on every transaction – all calls are logged, recorded and call data can be patched into enterprise systems for analysis or follow-through. The cloud fax service operates on a similar principle with faxes delivered as a PDF over email without any hardware installation required.

Scaling the Solution

For travel portal MakeMyTrip, Knowlarity deployed a custom solution that connects callers to customer support hotlines that are equipped to furnish the traveller with exhaustive information on his journey, including flight status, hotel and transport bookings. If manual assistance is needed, the system connects the caller with a customer support executive, while simultaneously displaying trip data to the support executive so that the caller's concern can be addressed speedily.

Making the Grade

The organisation offers its solutions in India and overseas and currently services over thousands of paying customers. Started in 2009 by 'technopreneurs' Gupta and his IIT Kanpur batchmate Pallav Pandey, the organisation has grown quickly to over 200 people. With a 'pay per use' revenue model, the organisation holds out an attractive proposition to SMEs not keen on hardware investments in PBXs and fax systems. With a top line in excess of ₹ 30 crore within three years of launch, this is one proposition that customers are certainly biting into.

Organisation
Knowlarity Communications

Play space
Cloud Telephony

It all started in
2009

At the helm
Ambarish Gupta and Pallav Pandey

Winning gameplay
Creating a seamless communication platform that connects businesses to their customers 24*7

High point
Pioneering the cloud telephony space in India

Educating the World

Foradian Technologies

on building a thriving marketplace for their product

Foradian's journey started in 2008 with eight childhood friends from Kasargod, Kerala. The organisation was launched with seed money from 2 partners' families. While they started out as a services organisation, within three months they began focusing on developing a school management system for a local school.

Innovating on Opensource

Initially, while trying to sell Fedena to different schools, the team realised that deployment for each school required heavy customisation, which made the model difficult to scale. They soon hit upon the idea of developing the school management platform as opensource software. In the crowded school management solutions market what makes Fedena stand out is the open source business model, where the basic solution is available at no cost while Foradian only charges for additional plug-ins. Other organisations are also free to innovate and develop their plug-ins on Fedena. This has helped create a thriving ecosystem and marketplace for Fedena.

Fedena, the school management system which is currently deployed at over 40,000 schools across the world is the best-selling product for the organisation now.

Spreading their Wings

The founders describe their entrepreneurship journey as 'fun'. Their families, they say, have been very supportive and kept faith in them even when the going was tough. Today, all government schools in Kerala have installed the Fedena solution and the team is increasingly receiving inquiries from overseas," says Abdul Salaam, the President.

Foradian expects to touch USD 1 million in revenues this year. The team has recently relocated the headquarters to Bengaluru, however they plan to retain the Kasadgod office for 'sentimental reasons'. The founders speak passionately about their future plans and want to continue developing products for the education sector. "In the pipeline are solutions that will make textbooks free for every student and another software product that will address the lack of quality faculty, an issue that assails several schools. We will provide the A-Z of education products," claims Unni Koroth, CEO of Foradian.

Organisation
Foradian Technologies Pvt. Ltd.

Play space
School management software

It all started in
2008

At the helm
Unni Koroth, Abdul Salam, Arvind GS, Abdulla Hisham, Deepesh Melath, Vishwajith, Praveen Prabhu and Arun Raveendran

Winning gameplay
Leveraging the open source model to create a highly accessible product

High point
Scaling their solution to reach more than 40,000 schools around the world

A Quiet Revolution in the Hills

B2R Technologies Pvt. Ltd.

on giving back to the community while remaining profitable

A BPM in the hill state of Uttarakhand, one that gives back to the community even as it remains profitable for its promoters – that was the essence of Dhiraj Dolwani and Venki Iyer's dream when they set up this rural BPM – B2R Technologies in 2009. "We were clear right from the outset that the social model had to be self-sustainable," recalls Dolwani. So, even as the organisation remains committed to ploughing back 33 per cent of post-tax profits back into the community through funding for social projects, the organisation sees itself as a 'for-profit' play.

B2R also wanted to differentiate itself from the scores of other BPMs being set up in rural areas by not plucking low hanging fruit of low-value data-entry work, but instead deliberately creating capabilities to work in niche areas where quality was vital. The organisation has been focusing on legal process outsourcing (LPO) and publishing sectors that have generated key clients.

Almost 80 per cent of B2R's recruits have typically never touched a computer before. "Our training strategy is to componentise whatever is being learnt. We focus on teaching the components of a task, as well as the context of a task. Today, people trained through this model are servicing clients in Manhattan with 99.95 per cent SLAs," points out Dolwani. A big upside is the cultural push towards educating children and a workforce familiar with English. In Uttarakhand, English is the third language taught to students Class six onwards. So, while the average B2R recruit is a high school graduate, awareness of English is in place for most of them, sufficient to make them 'trainable'.

With a focus on gender parity, for more than 50 per cent of their staff comprising of young women, the employed status changes the social-dynamics at home from being a burden on the family to a bread-earner. With expansion to more districts planned, the vision is to employ 6000 rural youth over five years.

Organisation
B2R Technologies Pvt. Ltd.

Play space
Rural BPM

It all started in
2009

At the helm
Dhiraj Dolwani, Venki Iyer

Winning gameplay
Building a rural BPM that focuses on high end niche work

High point
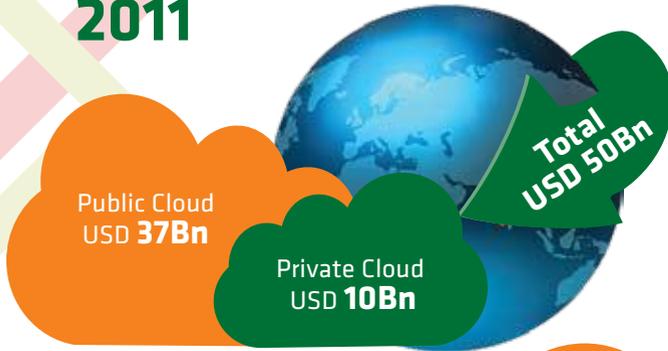Creating a sustainable social model that makes profits even as it gives back to the community

Opportunities in Emerging Technologies

CLOUD COMPUTING

A GROWING OPPORTUNITY ACROSS THE WORLD

Worldwide Cloud Market

2011

Public Cloud USD **37Bn**

Private Cloud USD **10Bn**

Total USD 50Bn

25%

2015

SaaS and IaaS contribute larger share whereas PaaS would witness higher growth rate as the ecosystem mature

Public Cloud USD **80Bn**

Private Cloud USD **21Bn**

Total USD 120Bn

The cloud adoption is higher in developed markets however the emerging markets are estimated to grow rapidly

■ Public Cloud ■ Private Cloud

The total cloud market in India is set to grow from USD 700Mn in 2011 to USD 4.5 Bn in 2015.

Public Cloud Market in India*, (USD Mn)

Year	1-2 / 27-33 / 98-117	3.4	5-7	8-10	11-13

2011: ~5 / ~155
2012: ~5 / ~155
2013: ~100 / ~230
2014: ~190 / ~335
2015: ~354 / ~499

□ SaaS ■ IaaS ■ PaaS

Private Cloud Market in India, (USD Mn)

3,574 **2015**
2,306 **2014**
1,488 **2013**
902 **2012**
530 **2011**
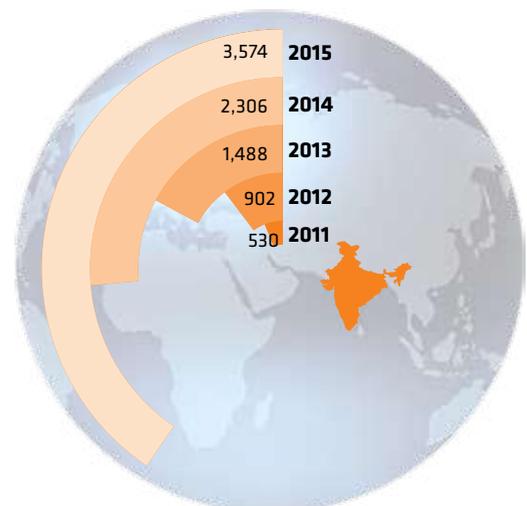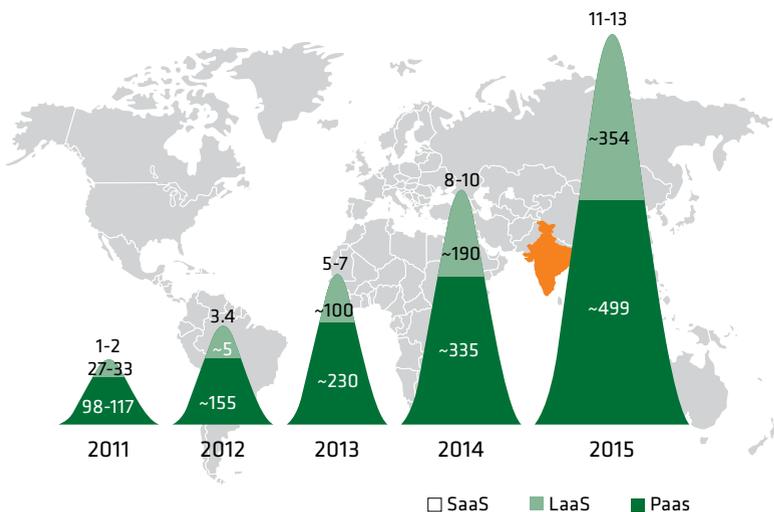
Source: IDC, Primary interactions with key stakeholders in the cloud ecosystem; Zinnov analysis
Note: *Linear projections based on historic growth observations

Cloud Computing Adoption in India – A Vertical Wise Analysis 1/2

Cloud Migration		FSI	Mfg	Edu	Retail	Health care	IT/ITeS	FSI	Mfg	Edu	Retail	Health-care	IT/ITeS
PaaP	B2B Apps												
	Mobile apps												
SaaS	Social apps												
	CRM												
	ERP												
	Decision Support												
	Email												
	Collaboration												
	Portal & Content Mgmt												
	Core Applications												
	Productivity & Others												

Low Cloud Migration ◼ ◼ ◼ ◼ ◼ ◼ ◼ ◼ → High Cloud Migration
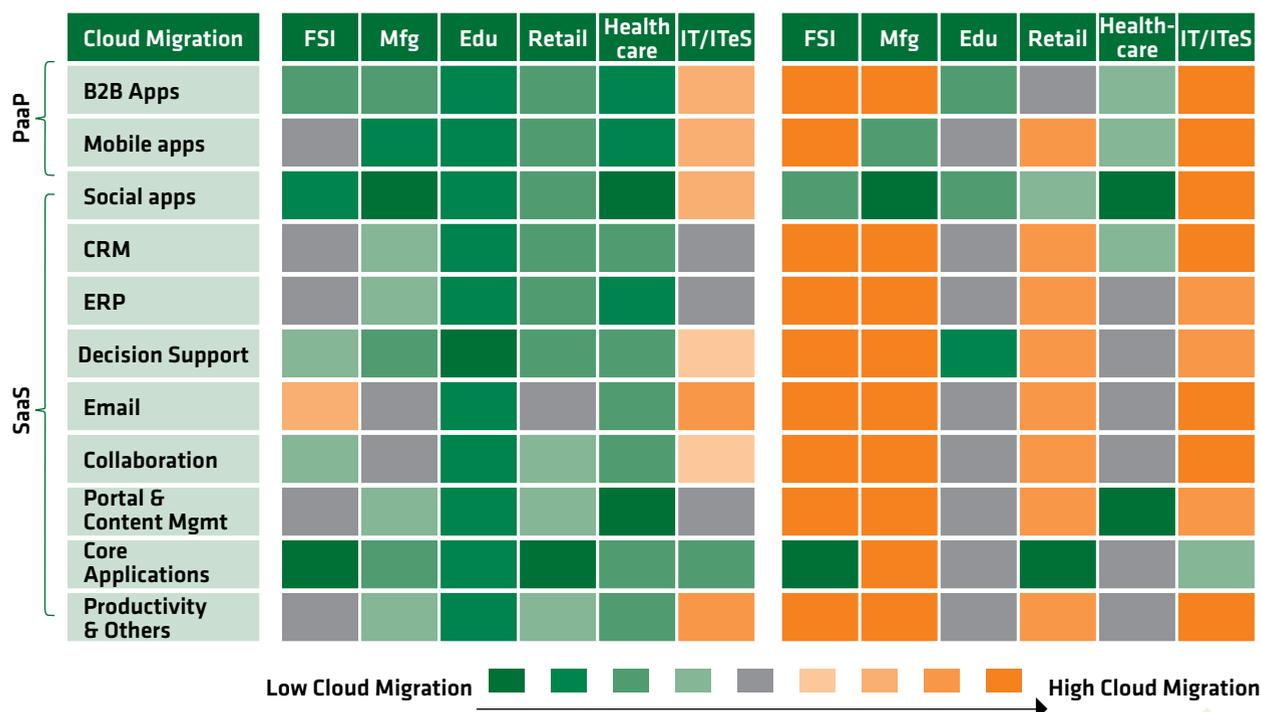
Cloud Computing Adoption in India – A Vertical Wise Analysis 2/2

Vertical	Total IT Spending (US$ Mn)	Total Cloud Spending (US$ Mn)	Cloud Spend as Percentage of IT	% age Contribution in Total Cloud Market in India
IT/ITeS	$333	$76	22.8%	19%
Telecom	$1,904	$71	3.8%	18%
BFSI	$3,335	$60	1.8%	15%
Manufacturing	$8,662	$56	0.6%	14%
Government	$4,619	$48	1.0%	12%
Energy, Power, Utility	$4,710	$28	0.6%	7%
Healthcare	$308	$24	7.7%	6%
Retail	$107	$5	4.3%	1%
Others	$1,858	$33	1.8%	8%

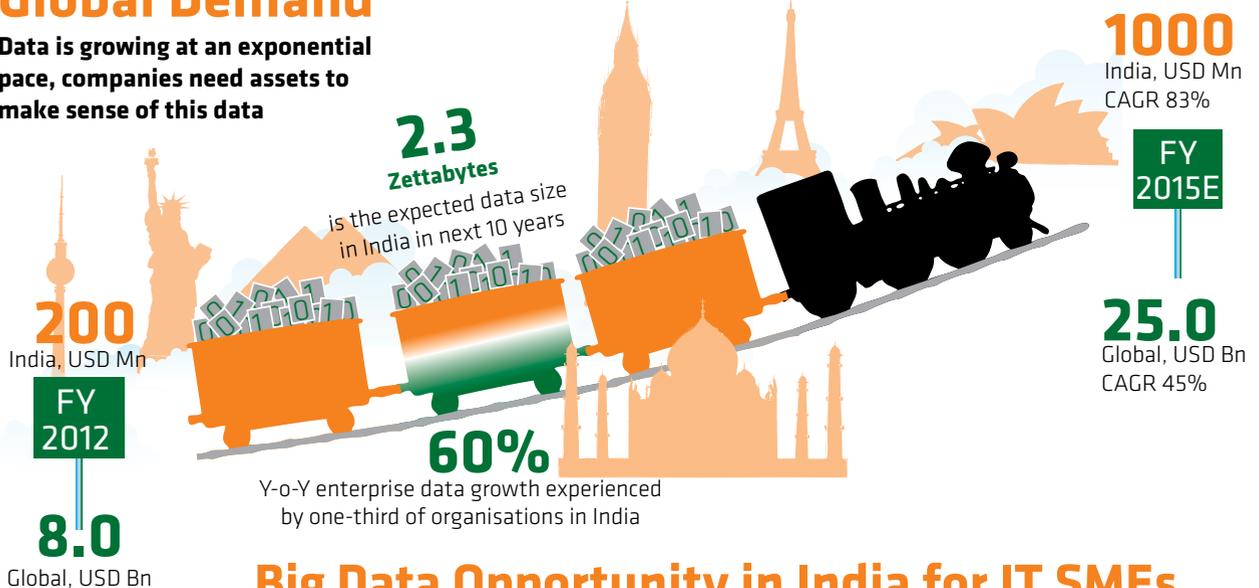| Year	2010	2011E	2012E	2013E	2014E	2015E
Total IT Spend (US$ Bn)	28.8	33.5	39.0	44.4	49.8	54.7
Total Public Cloud Spend (US$ Bn)	0.1	0.1	0.2	0.4	0.6	0.9
Total Private Cloud Spend (US$ Bn)	0.3	0.5	0.9	1.5	2.3	3.6
Total Cloud Spend (US$ Bn)	0.4	0.7	1.1	1.9	2.9	4.5
Cloud Spend as %age of Total IT Spend	1.4%	2.0%	2.9%	4.2%	5.8%	8.2%

Analytics – A Big Opportunity!

Global & India Big Data Market Size

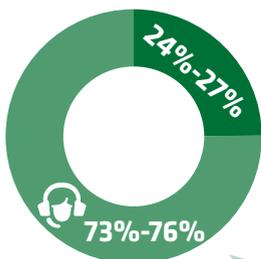**8** USD billion

200 USD million

FY2012

25 USD billion

1 USD billion

FY2015E

■ Global Market Size   ■ Domestic Market Size

Global Demand

Data is growing at an exponential pace, companies need assets to make sense of this data

2.3 Zettabytes
is the expected data size in India in next 10 years

1000
India, USD Mn
CAGR 83%

FY 2015E

25.0
Global, USD Bn
CAGR 45%

200
India, USD Mn

FY 2012

8.0
Global, USD Bn

60%
Y-o-Y enterprise data growth experienced by one-third of organisations in India

Big Data Opportunity in India for IT SMEs

India

100%= ~USD 1.1 billion

24%-27%

73%-76%

■ Pure-play Analytics firms

■ Integrated IT/ BPO players

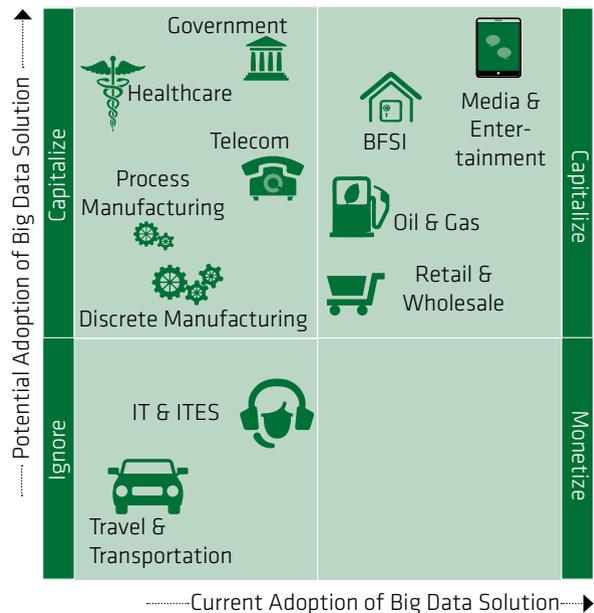Source: CRISIL GR&A analysis

From outsourcing perspective, Indian IT SMEs have two opportunities:

Pure-play Analytics Services: Small & mid-sized IT/ITES firms can leverage their subject matter expertise and offer big data / analytics' knowledge services to global companies

Integrated Services: IT SMEs can offer end to end solutions for big data, which may include system integration and service provisioning for turnkey big data solutions

Potential Adoption of Big Data Solution →

Capitalize

Ignore

Capitalize

Monetize

Government

Healthcare

Telecom

Process Manufacturing

Discrete Manufacturing

BFSI

Media & Entertainment

Oil & Gas

Retail & Wholesale

IT & ITES

Travel & Transportation

Current Adoption of Big Data Solution →

Enterprise Mobility (EM) – growing potential across the world

5.52 USD billion

244 USD million

FY2011

7.7%

7.7 USD billion
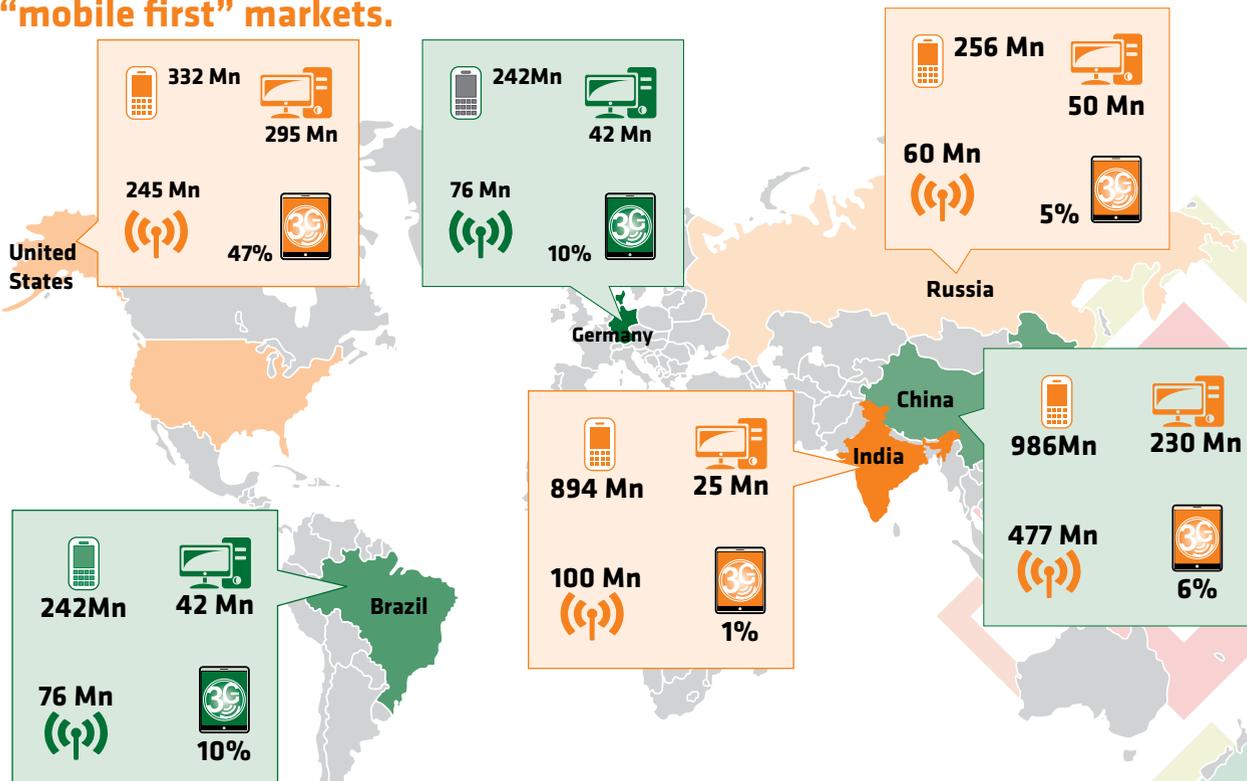
964.4 USD million

FY2015E

■ Worldwide Enterprise Mobility Market (Including Open Operating System Segment, End-user Devices Segment)

■ Enterprise Mobility Market (excluding Devices) in India, USD Million

Unlike developed markets, developing countries are emerging as "mobile first" markets.

United States
332 Mn
295 Mn
245 Mn
47%

Germany
242Mn
42 Mn
76 Mn
10%

Russia
256 Mn
50 Mn
60 Mn
5%

Brazil
242Mn
42 Mn
76 Mn
10%

India
894 Mn
25 Mn
100 Mn
1%

China
986Mn
230 Mn
477 Mn
6%

Enterprise Mobility Market Split by Service Lines in India

Usability & Testing 10%

Backend HW/SW 16%

Usability & Testing 10%

Network & Data 8%

Prof. Services/SI 20%

Apps & Customization 36%
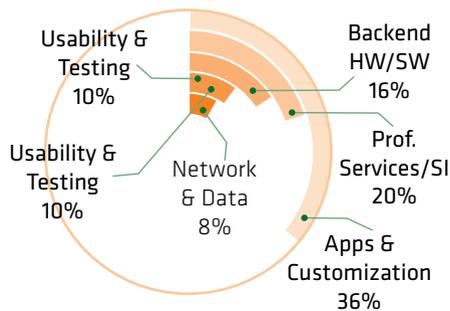
Selection Framework and Jury

Selection Framework

Levels	Key Activities

Application Filing

- Applications received for the NASSCOM Emerge 50 Awards 2012 were validated for eligibility

Primary Evaluation

- Applications were analysed through a mathematical model on a number of parameters including financials, growth, market differentiator, customers, market visibility, innovation impact etc.
- Top 15 organisations each from Growth and Innovation categories and Top 20 organisations from Start-up formed the Emerge 50

Jury Evaluation

- Jury rounds were conducted across three cities – Bengaluru, Delhi and Mumbai to arrive at the League of 10

Location Wise Split of All Applications

NCR - 18%

Mumbai/Pune - 21%

Hyderabad - 7%

Bangalore - 26%

Chennai - 13%

Others - 16%
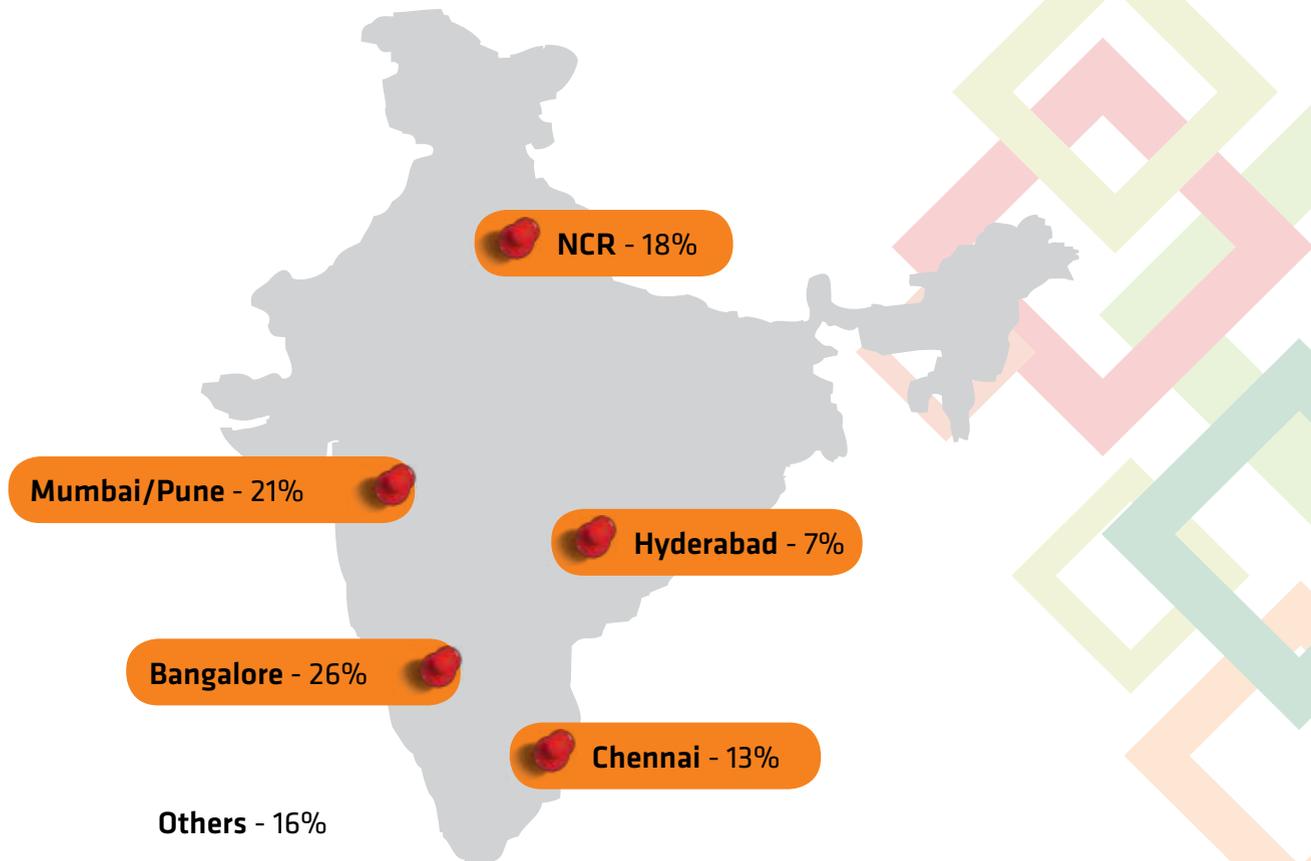
NCR includes: Delhi, Gurgaon and NOIDA

Jury Members

Anil Bakht
Eastern Software
Systems

Pramod Bhasin
Genpact

Arjun Malhotra
Headstrong

Mohit Goyal
Indian Angel
Network

**Krishna Kumar
Natarajan**
Mindtree

Anal Jain
Industry Veteran,
Former MD at
MicroVentures

NRK Raman
Former MD & CEO,
Oracle Financial
Services Software
Ltd.

Samir Kumar
Inventus India
Advisors

Sameer Brij Verma
Nexus Venture
Partners

GBS Bindra
Logica

Manav Garg
Eka Software
Solutions

Mukund Mohan
Microsoft Startup
Accelerator

Uresh Vahalia
EMC Corp

Anil Joshi
Mumbai Angels

Prakash Rane
ABM
Knowledgeware Ltd.

Ashank Desai
Mastek

Ninad Karpe
Aptech Ltd.

NASSCOM Emerge
50 Winners for 2012

Emerge 50: Start-Ups

Organisation Name| Array Shield Technologies Pvt. Ltd.

Headquarter| Chennai

Year of Inception| 2010

Organisation Website| www.arrayshield.com

Brief Description| A security solutions Organisation providing a patent pending two factor authentication solution

Organisation Name| Codelearn.org

Headquarter| Bengaluru

Year of Inception| 2012

Organisation Website| www.codelearn.org

Brief Description| A completely browser based platform for programmers to learn and perfect their coding skills

Organisation Name| Attinad Software

Headquarter| Trivandrum

Year of Inception| 2010

Organisation Website| www.attinadsoftware.com

Brief Description| A software solutions Organisation providing end-to-end enterprise mobility platform

Organisation Name| Gramener Technology Solutions Pvt. Ltd.

Headquarter| Hyderabad

Year of Inception| 2010

Organisation Website| www.gramener.com

Brief Description| A data visualisation products and services Organisation using non-traditional analytics approaches in real time

Organisation Name| B2R Technologies Pvt. Ltd.

Headquarter| New Delhi

Year of Inception| 2009

Organisation Website| www.b2r.in

Brief Description| BPM services provider leveraging talent available in rural India to cater domestic and international clients

Organisation Name| Knolskape Solutions Pvt. Ltd.

Headquarter| Mumbai

Year of Inception| 2009

Organisation Website| www.knolskape.com

Brief Description| A Organisation engaged in developing simulation and gaming based training and assessment programs

Organisation Name| CipherGraph Networks

Headquarter| Bengaluru

Year of Inception| 2011

Organisation Website| www.ciphergraph.com

Brief Description| CipherGraph provides an enterprise class cloud based hardware free VPN services

Organisation Name| Metamagics Computing Pvt. Ltd.

Headquarter| Pune

Year of Inception| 2008

Organisation Website| www.metamagics.com

Brief Description| A technology firm that provides automated data modeling using semantic web and natural language technologies

Organisation Name| Mettl.com

Headquarter| Gurgaon

Year of Inception| 2009

Organisation Website| www.mettl.com

Brief Description| Online assessment engine for corporate HR and recruiting teams

Organisation Name| MilkorWater

Headquarter| Hyderabad

Year of Inception| 2011

Organisation Website| www.milkorwater.com

Brief Description| A recommendation engine for investments in the financial markets

Organisation Name| Muhive Technologies Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2012

Organisation Website| www.muhive.com

Brief Description| Muhive provides an automated integrated environment to manage customer interactions across websites, e-mail, mobile applications and social networks

Organisation Name| Mymo Wireless Technologies Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2009

Organisation Website| www.mymowireless.com

Brief Description| A technology solutions firm developing solutions for next generation networks such as LTE

Organisation Name| PromptCloud

Headquarter| Bengaluru

Year of Inception| 2009

Organisation Website| www.promptcloud.com

Brief Description| Promptcloud provides Data-as-a-Service for large-scale web crawl and delivery of structured data

Organisation Name| Reverie Language Technologies Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2009

Organisation Website| www.reverie.co.in

Brief Description| A young start-up providing local language text display, input and processing solutions on digital platforms

Organisation Name| Rolocule Games Pvt. Ltd.

Headquarter| Pune

Year of Inception| 2010

Organisation Website| www.rolocule.com

Brief Description| A organisation developing immersive games for the mobile platform

Organisation Name| Simplibuy Technologies Pvt. Ltd.

Headquarter| Pune

Year of Inception| 2010

Organisation Website| www.wic.co.in

Brief Description| Simplibuy is a hyper local price discovery engine leveraging social media

Organisation Name| Sukrut Systems

Headquarter| Pune

Year of Inception| 2010

Organisation Website| www.sukrutsystems.com

Brief Description| A organisation developing solutions built around machine-to-machine communications

Organisation Name| Trutech Webs Pvt. Ltd.

Headquarter| Mumbai

Year of Inception| 2009

Organisation Website| www.trutechwebs.com

Brief Description| Trutech provides an online testing and assessment platform for multiple skill sets

Organisation Name| TapToLearn Software

Headquarter| Pune

Year of Inception| 2010

Organisation Website| www.taptolearn.com

Brief Description| Developer of educational games for kids on mobile platforms

Emerge 50: Innovation

Organisation Name| CustomerXPs Software Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2006

Organisation Website| www.customerxps.com

Brief Description| An analytics solutions firm focused on customer and transaction analytic in banking sector

Organisation Name| Foradian Technologies Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2009

Organisation Website| www.foradian.com

Brief Description| Foradian develops a highly scalable, open source ERP for schools, colleges and educational boards

Organisation Name| Heckyl Technologies Pvt. Ltd.

Headquarter| Mumbai

Year of Inception| 2010

Organisation Website| www.heckyl.com

Brief Description| Heckyl provides a real-time news analytics and sentiment mining dashboard

Organisation Name| iKen Solutions Pvt. Ltd.

Headquarter| Navi Mumbai

Year of Inception| 2008

Organisation Website| www.ikensolutions.com

Brief Description| A organisation leveraging artificial intelligence for developing technologies for consumer-centric analytics

Organisation Name| Knowlarity Communications

Headquarter| Gurgaon

Year of Inception| 2009

Organisation Website| www.knowlarity.com

Brief Description| Cloud telephony solutions organisation leveraging PSTN cloud to deliver voice and fax solutions

Organisation Name| Kreeo

Headquarter| Bengaluru

Year of Inception| 2007

Organisation Website| www.kreeo.com

Brief Description| Kreeo provides an enterprise class knowledge management and collaboration platform

Organisation Name| Langoor Digital Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2010

Organisation Website| www.langoor.com

Brief Description| A technology firm developing solution for conversion of desktop websites to mobile websites

Organisation Name| Lexplosion Solutions Pvt. Ltd.

Headquarter| Kolkata

Year of Inception| 2007

Organisation Website| www.lexplosion.in

Brief Description| A legal solutions firm developing automated compliance management, litigation management and contract management solutions

Organisation Name| MercuryMinds Technologies Pvt. Ltd.

Headquarter| Chennai

Year of Inception| 2008

Organisation Website| www.mercuryminds.com

Brief Description| Start-up developing mobile shopping cart solutions to enable mobile commerce platform for retailers

Organisation Name| Reasoning Global eApplications Pvt. Ltd.

Headquarter| Hyderabad

Year of Inception| 2007

Organisation Website| www.martjack,com

Brief Description| The organisation provides an end-to-end platform for setting up an eCommerce portal

Organisation Name| NinetyNine Tests Software

Headquarter| Bengaluru

Year of Inception| 2011

Organisation Website| www.99tests.com

Brief Description| A crowd sourced software testing platform for enterprises

Organisation Name| Techcello

Headquarter| Tanjore

Year of Inception| 2009

Organisation Website| www.techcello.com

Brief Description| TechCello provides an application development platform to write multi-tenant .NET applications for any cloud

Organisation Name| Niqotin

Headquarter| Chennai

Year of Inception| 2008

Organisation Website| www.niqotin.com

Brief Description| A cloud-based Indian language ERP systems targeted at rural markets

Organisation Name| Waybeo Technology Solutions

Headquarter| Trivandrum

Year of Inception| 2009

Organisation Website| www.waybeo.com

Brief Description| Waybeo provides cloud based inbound voice communication platform which can be integrated to any existing online channel

Organisation Name| Ojas Testing Solutions

Headquarter| Bengaluru

Year of Inception| 2011

Organisation Website| www.ojastestingsolutions.com

Brief Description| A organisation developing platforms to convert manual test cases to automated test cases

Organisation Name| ZipDial

Headquarter| Bengaluru

Year of Inception| 2010

Organisation Website| www.zipdial.com

Brief Description| ZipDial is a cloud-based mobile platform for marketing, engagement and analytics

Emerge 50: Growth

Organisation Name| ABIBA Systems

Headquarter| Bengaluru

Year of Inception| 2006

Organisation Website| www.abibasystems.com

Brief Description| ABIBA develops business intelligence solutions for telecommunication services providers

Organisation Name| BitRhymes (India) Pvt. Ltd.

Headquarter| Bhubaneswar

Year of Inception| 2008

Organisation Website| www.bitrhymes.com

Brief Description| BitRhymes is a game development firm developing casino games for digital platforms

Organisation Name| Capillary Technologies

Headquarter| Bengaluru

Year of Inception| 2008

Organisation Website| www.capilarytech.com

Brief Description| A organisation providing cloud-based real-time customer engagement solutions on mobile for retailers

Organisation Name| Eko India Financial Services Pvt. Ltd.

Headquarter| Delhi

Year of Inception| 2007

Organisation Website| www.eko.co.in

Brief Description| A organisation using mobile phones to deliver banking solutions to unbanked population

Organisation Name| Foundation Futuristic Technologies Pvt. Ltd.

Headquarter| New Delhi

Year of Inception| 1999

Organisation Website| www.forensicsguru.com

Brief Description| A cyber and mobile forensics firm developing digital investigation solutions

Organisation Name| Freshdesk Inc.

Headquarter| Chennai

Year of Inception| 2010

Organisation Website| www.freshdesk.com

Brief Description| Feshdesk is a provider of cloud based customer support software

Organisation Name| Maven Systems Pvt. Ltd.

Headquarter| Pune

Year of Inception| 2009

Organisation Website| www.mavensystems.com

Brief Description| An outsourced product development firm in the area of hardware, BSP, firmware, web and mobile

Organisation Name| mCarbon Tech Innovation Pvt. Ltd.

Headquarter| New Delhi

Year of Inception| 2008

Organisation Website| www.mcarbon.com

Brief Description| mCarbon provides niche mobile VAS related IT technology for telecommunication service providers

Organisation Name| NMSWorks Software Pvt. Ltd.

Headquarter| Chennai

Year of Inception| 2001

Organisation Website| www.nmsworks.co.in

Brief Description| NMSWorks Software delivers network management solutions to telecommunication firms

Organisation Name| OpCord Consultancy Services Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2009

Organisation Website| www.opcord.com

Brief Description| An emerging IT services Organisation focused on testing, outsourcing and consulting services

Organisation Name| Openlabs Technologies & Consulting Pvt. Ltd.

Headquarter| NOIDA

Year of Inception| 2010

Organisation Website| www.openlabs.co.in

Brief Description| An IT services firm focussed on implementation and integration services for open source software

Organisation Name| Ozonetel Systems Pvt. Ltd.

Headquarter| Hyderabad

Year of Inception| 2007

Organisation Website| www.ozonetel.com

Brief Description| A organisation building PSTN cloud to enable cloud based IVR, PABX and BPM services

Organisation Name| SISA Information Security Pvt. Ltd.

Headquarter| Bengaluru

Year of Inception| 2003

Organisation Website| www.sisainfosec.com

Brief Description| A technology firm developing solutions in the payment security and risk assessment domain

Organisation Name| Tyroo Media

Headquarter| Gurgaon

Year of Inception| 2006

Organisation Website| www.tyroo.com

Brief Description| Tyroo Media is a fast growing online performance and display advertising platform
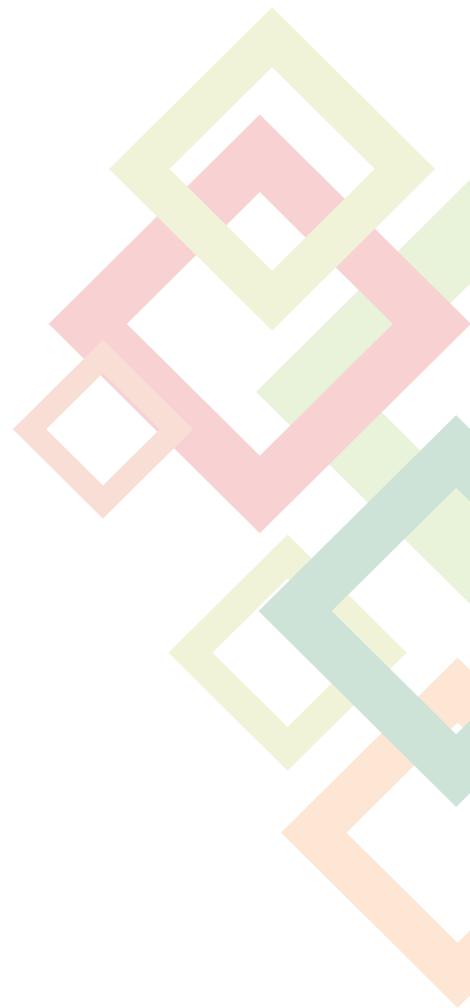
Organisation Name| Vizury Interactive Solutions Pvt. Ltd.

Headquarter| New Delhi

Year of Inception| 2008

Organisation Website| www.vizury.com

Brief Description| Vizury develops solutions for targeted online advertising and visitor relationship management

TechieHealth

An Umbrella Health Insurance Cover
For NASSCOM Members

The Classic Dilemma of a Small & Medium IT Company

DEMANDS

- Attract & retain high caliber talent for growth
- Comprehensive cover
- Affordable & Predictable premiums
- Optional cover for parents
- Flexibility of coverage
- Outsourced administration

CHALLENGES

- Rising healthcare costs warranting higher sum insured for employees
- Either no cover available or are priced out completely
- Limited access to knowledgeable & effective intermediaries having a 360-degree view on health insurance
- Support for claims and dispute settlement is nearly non-existent for smaller employee groups
- Higher premia for smaller companies

The Solution

TechieHealth

A plan exclusively created considering NASSCOM members' needs & challenges

The TechieHealth Advantages:

Options to choose the Sum Insured

Optional coverage to insure spouse, children or parents with add-on cover

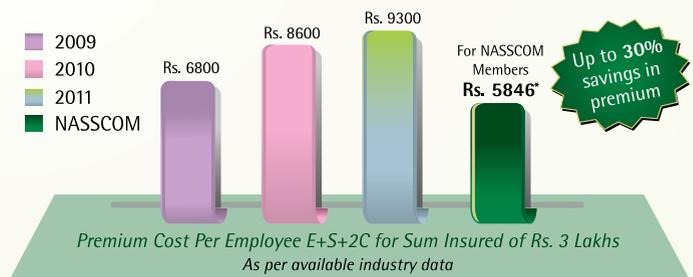**Pre-existing disease cover, Maternity cover, waiting periods waived**

Required expertise for end-to-end support in all health insurance needs

Optional premium can be directly paid to insurer vide Credit Card / Debit Card / Internet banking

Complete Online Insurance Administration thru' Medimanage's mPower Online Portal

- 2009
- 2010
- 2011
- NASSCOM

Rs. 6800
Rs. 8600
Rs. 9300

For NASSCOM Members
Rs. 5846*

Up to **30%** savings in premium

Premium Cost Per Employee E+S+2C for Sum Insured of Rs. 3 Lakhs
As per available industry data

Insurance is a subject matter of solicitation. *Conditions Apply.

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