ANNUAL REPORT

2019

About Us

The National Association of Software & Service Companies (NASSCOM) is the industry association for the IT- BPM sector in India. It was set up in 1988 and registered under the Indian Societies Act,1860. A not-for-profit organisation funded by the industry, its objective is to build a growth-led, sustainable, technology and business services segment in the country. NASSCOM's membership has grown over the years and currently hovering around 3000. The member organizations represent 95 per cent of industry revenues and have enabled the association to spearhead initiatives and programmes to strengthen the sector in the country and globally. NASSCOM has also contributed to the development of two organisations the Data Security Council of India, which is focused on security and the NASSCOM Foundation, which helps drive Corporate Social Responsibility (CSR) initiatives.

President's Message

2019 has been a phenomenal year for NASSCOM and me personally. I took over as President, NASSCOM in April 2018 and in the 18 months have been amazed with the energy, commitment and passion of the industry and our members to build a vibrant technology and services sector in the country.

The rapid advancement in technology is enabling the industry to achieve scale and business process efficiencies like never before, and essentially, re-write the rules of competition. Those who are able to adapt faster and better are becoming disrup- tors, and eventual winners. This provides us tremendous opportunities for growth on one hand, while it also poses significant challenges of reinventing business models. As Klaus Schwab so brilliantly said, there has never been a time of greater promise and greater peril.

One thing that is shaping a company's competitive advantage above all is access to the right talent. Companies and countries that have the talent needed to convert digital assets and IP to digital advantage, are emerging as the new world leaders. As the Industry transforms, NASSCOM is also undergoing its own transformation to accelerate our ability to act as the catalyst for the growth of the Indian Technology and Services industry in India.

In 2018, our key focus was to align NASSCOM initiatives with these shifts and focus on the three key pillars of Nurture Innovation, Build the Tech Ecosystem and Grow Markets. And as we started to streamline focus on the 3 key areas, we have continued to strengthen NASSCOM thought leadership with focus on Innovation and Talent across outreach programs, invest in growing the organization and build membership engagement. The NASSCOM FutureSkills initiative was our flagship initiative for the year and focused on building a collaborative learning ecosystem which has already witnessed more than 200,000 employee registrations.

As we look ahead in 2019, the key priorities we have outlined for NASSCOM include:

- Build the New Industry Narrative with focus on Innovation, Talent, Collaboration, Trust and Inclusion
- Grow Tech Talent and Ecosystem as India's key differentiator
- Build India as an Innovation hub in AI, IOT and Cyber-Security
- Lead the development of an optimal regulatory framework for India that balances innovation with security

- Strengthen Gov't advocacy and partnerships to drive policies to grow existing markets and create new markets for members
- Strengthen Membership Engagement with focus on business impact
- Continue to strengthen NASSCOM with focus on Talent, Agility, Execution and Impact

All of this would only be possible with the support and leadership from our membership and I would like to sincerely thank you for your commitment to NASSCOM

Chairman Message

It's been an honor for me to lead NASSCOM as its Chairman for the year 2019-20. Having been involved with NASSCOM for the last few years, I have been very impressed with the NASSCOM mission and the engagement of its members that helps to drive the thought leadership for the industry.

With over 3000 members, NASSCOM today represents very diverse industry sectors – IT Services, BPM, ER&D, Products, GCCs, SMEs, Start-ups and our focus has been to continuously expand our programs and initiative to serve the broad horizontal needs of the membership as well as build segmented focus for each industry sector. I have had the pleasure of interacting with many of our members in different cities, engaged with the sector council leaders and my colleagues at the Executive Council and the ownership about NASSCOM

Our industry is increasingly transitioning to building digital solutions for the world and many NASSCOM initiatives have been catalysed to build capabilities and evangelise this shift. Our events during the year in India and overseas, showcased the digital transformation journey, our reports highlighted case studies on how different companies are adding business value to global customers and focused initiatives like Centres of Excellence, NASSCOM Industry Partner Program and FutureSkills catalysed the innovation imperative.

NASSCOM also expanded its global trade initiatives with expanding focus on markets like Nordics, Israel, China, Japan, Partner- ship with TechUK, C-Summit in US etc. The key message is one of partnerships and creating business opportunities for our members, while growing jobs together.

Start-ups are the nerve centre for any country and India's start-up ecosystem had an exciting 2018, with new unicorns being added, bumper year for funding and some large exits. NASSCOM 10,000 Start-ups and NASSCOM Product Council have an array of programs that are supporting the ecosystem in the country. Interacting with start-ups at the Product Conclave, the Start-up Warehouses and seeing their innovative ideas and products, I am certain the next wave for NASSCOM is to further accelerate the journey of these innovators.

As we look ahead, 2019 promises to be an exciting year, wherein digital will continue to be centre stage for all technology transformation initiatives. The industry and NASSCOM will continue to build on these initiatives and expand the vibrancy and impact of our sector for the country.

I would like to specially thank the NASSCOM Secretariat led by the President Debjani Ghosh for all their hard work and initia- tives to strengthen our industry's advocacy, build the key enablers and proactively address the challenges.

GLOBAL TRADE DEVELOPMENT (GTD)

The Global Trade Development (GTD) Initiative at NASSCOM has continued to emphasise its efforts towards two broad slivers i.e. Policy Advocacy and Market Development. Intensive engagement with 300+ member companies in regional outreach.

- **Policy**- In today's continuously evolving global regulatory environment, we work to ensure that NASSCOM members remain abreast of various policy developments to try and reduce bottlenecks that have the propensity to impact business, and participate across geographies while conforming to their new laws and modified policies. NASSCOM actively works to make representation on key policy challenges faced by industry mainly in developed markets including and not limited to US, UK, EU, Australia, Canada, South Africa and Singapore.

- **Market Development** - Indian IT-BPM companies have been expanding their geographic foot-print for several years now. In addition to nurturing existing markets, NASSCOM is also focusing on building inroads into newer areas – geographies, verticals and customer segments. Several high growth and under-penetrated regions look promising for the IT-BPM business e.g., Nordics, Latin America, Africa, Middle East, ASEAN, China, Japan among few. We continue to support member companies in creating a favourable eco-system to promote business growth. We are putting a huge emphasis on creating platforms for providing low cost soft landing spaces for our members in developed markets and further enhance technology partnerships and alliances that are likely to bring long-term strategic benefits, especially in NORDICS and Israel. High level of engagement with political leadership across various global markets help us to position members to gain early foothold there.

Classification of markets:

Based on elementary research, inputs from members, target regions identified have been classified as follows:

- **Traditional/ Developed Markets:** US, UK
- **Strategic Markets** : China, Japan
- **Markets for Technology Alliances :** Nordics, Israel, UK
- **Emerging Markets :** A&Z, Africa, MiddleEast, ASEAN

TRADITIONAL/ DEVELOPED MARKETS:

Combination of authentic research and information dissemination strategy was leveraged to communicate the positive impact of the Indian IT Industry in our key export markets. US Government now sees NASSCOM as a valued partner in seeking solutions for their core challenges such as bridging the STEM skills gap. As the UK firms up its post Brexit immigration regime, NASSCOM is in continuous engagements with various UK Government and business stakeholders to promote issues critical to both India and UK

<u>U.S.A.</u>

1. **Engaging with the US Political Leadership at the highest levels on the New Industry Narrative, focusing on value-creation to the American economy and workforce**
   - Never-before kind of outreach with the US Government: as a first for NASSCOM, met with top level officials in the White House and US Administration, including Ms. Ivanka Trump (Advisor POTUS), Larry Kudlow (Director, National Economic Council), Kellyanne Conway (Counselor POTUS); Wilbur Ross (US Secy of Commerce) & Eric Ueland (White House Director of Legislative Affairs)
   - This was built on a very successful campaign to change the industry narrative by focusing on the impact of the Indian IT Industry to the US economy and workforce. NASSCOM conducted first of its kind research to quantify the multi-fold value created by the industry in the US, in liaison with IHS Markit – a globally acclaimed research agency
   - The research reports were released at high-profile events in partnership with the Woodrow Wilson Center (WWC), leading DC based bipartisan think-tank. Speakers included Jane Harman (CEO WWC and nine time member of US Congress); Harsh Vardhan Shringla (then Indian Ambassador to the US), and Carlos Gutierrez (Former Sec. of Commerce, US), amongst other leading figures
   - Created a consistent messaging theme "Grow Jobs Together": outlining the industry contribution to FDI, jobs, skills, digital transformation; developed Twitter handle and website on these themes. Same is being used consistently by NASSCOM and all leading member companies in the US across different platforms e.g., in meetings with political and business stakeholders, social media handles

2. **Policy Advocacy**

   - Direct engagement efforts with the U.S. Government with key committees in both the House and Senate. Hosted a highly successful Reception in Capitol Hill, attended by several Congresspersons e.g., Reps. Greg Meeks, Jim Himes, Andy Barr, George Holding (Co-chairs of Global Investment in America Caucus) and their Chiefs of Staff
   - **Policy interim-victory:** a legislative proposal discriminating against most of our members was not tabled for passage in the US Senate. NASSCOM's incessant push with the Government of India entailed EAM Dr. Jaishankar raising the same at the 2+2 official India-US dialogue; and our issues on H-1B visas finding a mention in the EAM's official speech. Additionally, our outreach with US Senators and their Chiefs of Staff secured the groundwork for objecting to the passage of the bill via unanimous consent
   - **Intensive engagement with GoI** to ensure inclusion of our issues as priority in G2G discussions and helped in gaining their support.

3. **State Level Engagement**
- Two exclusive programs for SME members to US and one to Canada – providing members an opportunity to understand the respective tech ecosystems, meet key industry players and seek a soft landing opportunity

- Establishment of NASSCOM Launchpad, a soft landing facility in New Jersey with about 10 SME members committing to set up operations. MoU signed with New Jersey State in presence of Governor Phil Murphy
- Successfully utilized market development efforts to build relationships with State Governors: hosted Indiana Governor Eric Holcomb and New Jersey Governor Phil Murphy in India for intensive discussions with members on potential collaboration opportunities. NASSCOM SME companies were hosted by Governors of North Carolina and Ohio and Lt Governor of Michigan besides the Governor of New Jersey.

➢ **U.K.**
- UK is our industry's second largest and a very critical market for us. We have been engaging with the UK government on various issues such as Immigration, Apprenticeship Levy, Tier II Visa ICT Type, Surcharges and others that remain critical for our industry to operate in the UK. With a new government now in the UK with a clear mandate, engagement in all these areas along with promoting technology alliances, promoting skills partnership and alignment on data issues are likely to gather more steam. In this year we plan to work towards positioning Indian IT industry as strategic partner to the UK. This will mean multiple exchanges, hosting ministerial discourses, developing joint papers and roadmap for future collaboration.
- With the intent to provide a fillip to the market development efforts of SMEs, NASSCOM's 1st exclusive SME Program to UK was organised. The program has following key pillars of engagement:
    - **Setting and Scaling up in UK:** Focused engagement as a key partner at London technology week working with UK Government and consulting partners like Grant Thornton
    - **Sectoral Opportunities:** Opportunities in Fintech, Healthcare, Smart cities, Ecommerce, Tech centric sessions like Cloud & Dev-ops, Cyber security, AR/VR, AI/ML, IOT, Capital raising for tech companies, Future of selling using technology and data analytics were handpicked from the London Tech Week.
    - **Going beyond London:** Under the aegis of "Manchester India Partnership" a day's visit to Manchester was organized to explore possibilities beyond London. A well received program having B2Bs with Ecommerce companies like AO and N Brown demonstrating intent to work with Start-ups/SMEs, affordable incubation ease of settingup and networking with local business community,
    - **Networking opportunities & Receptions:** A series of exclusive networking opportunities and receptions were made available to NASSCOM participants by DIT (Department of International Trade) and MIDAS (Manchester's Inward Investment Agency). Networking Reception hosted by Liam Fox, SOS for International Trade, provided everyone an opportunity to meet with the senior most office bearers from DIT, industry leaders, potential partners, clients. A very exclusive reception made available to NASSCOM participants

STRATEGIC MARKETS

In 2019, we continued our focused efforts to curate large and emerging non-English speaking markets to intensify Indian IT's position in these markets. In the first phase, two large economies were included viz. China and Japan. In the short span of time, we have made significant progress in these markets. We are in the process of adding Germanic (Germany, Switzerland, Austria) and French speaking (France, Belgium, Luxemburg) EU markets, to this basket emulating our experience of Chinese and Japanese markets.

Below is a brief summary of what we have done in non-English speaking markets in 2019:

❖ **China**
- Total amount of business wins for 16 members from our IT corridors currently amounts to CNY 24Mn
- Further, Indian companies are in reckoning of deals worth CNY 31 Mn in the pipeline
- 5 Indian SMEs committed to open their offices in IT corridor; will reach tally of 10 company's setup by March
- 80 Indian & 40 Chinese companies are part of SIDCOP platform
- We have on ground team of 8 people now helping member companies with local connections and setup
- Our programs in China has seen participation from over 300 Chinese companies
- More information about our China initiatives at www.nasscomitcorridor.cn

❖ **Japan**
- Maiden Start-up-VC Connect program was organized in Tokyo with 26 Indian start-ups that made pitch to 140 Japanese VCs in Sep 2019; 1500+ Indian start-ups enrolled for the event out of which 26 were shortlisted
- 3 Indian companies have successfully raised capital and 4-6 others to follow suit ; 2 of these companies have also closed business deals under co-create mode
- We have conducted 4 dedicated CxO RTs to promote B2B cooperation between Indian and Japanese companies
- 3 large companies contracts materialized from our Hiroshima initiative with Mazda & Sojitz, 2 companies have signed deal post CEATEC delegation and several other leads close to conversion
- Touched 300+ Japanese companies through our programs

❖ **Germanic and French**
- Maiden outreach program was attended by 15 Indian delegates and 35+ leading German and French companies (ESI group, SAFRAN, MPSA, Primatec, Schneider Electric, etc.); results were very encouraging
- 4 large companies are working on 7 leads to close business deals with German and French companies as resultant of these efforts
- In discussion with Alliance Industrie Du Futur to form partnership for Industry 4.0 with Indian tech cos; Alliance's endeavour is to help 3,000 French SMEs deploy Industry of the Future/Industry 4.0 Plan in the next 2 years and 10,000 SMEs in the next 5 years
- Organizing ER&D only delegation in March 2020 in addition to the NASSCOM delegation planned to benefit SME members during Hannover Messe Fair

MARKETS FOR TECHNOLOGY ALLIANCES

Impacted over 100+ member companies cutting across market engagement in geographies below.

❖ **Nordics:** We are a well-established player in the NORDICS network cutting across all the main countries.
- NASSCOM signed a MOU with UNNATI, an Indo-Swedish partnership program having large Swedish Enterprises on board, providing market & enterprise access to Indian Startups.
- Push from GOI to intensify engagement in the region and approval received for a financial support to sustain efforts over period of 3 years.

- Focus on forming tech alliance with local scale up start-ups pitching to our member companies – strongly supported by Embassy of India in Finland and Estonia, Embassy of India in Sweden, IDC, Radar, Combient and many others. NASSCOM is engaged with end-user association of large manufacturing companies in Sweden, Combient to explore partnership opportunities cutting across start-ups, skilling and business connects.

Focus on go to market strategy built on:
- Understanding Landscape, Business Opportunities & Culture nuances : IT Landscape, Sectoral opportunities, Comp & Price benchmarking, Competitor landscape, CXO priorities
- Ways to access business, networking with probable partners & B2Bs: One of the largest market place platform E-Work and a budding one Otivr explained how to leverage their platforms to access business.
- Setting up, Hand-holding : NASSCOM negotiated an attractive package with Embassy House, a multi-location soft-landing & incubation provider for companies keen to setup. Additionally services around filing a local entity, HR Payroll, F&A, Compliance to be made available at a nominal cost.
- Location visit to Estonia (Tallinn) –location assessment visit to Tallin. The country of 1.3 Million have done excellent work in EGovernance and citizen services. Skill shortage and Government backed program to attract high-skilled workers is in place.
- Representation from GOI demonstrating seriousness and ensuring a first-hand experience on how we add value through such engagements.
- India – Sweden Business Summit: NASSCOM Partnered in India – Sweden Business Summit held in December 2019. President NASSCOM was the Keynote Speaker in the summit during the session on Digital India – Transforming a Connected Nation

❖ **Israel:**
- Great collaboration between NASSCOM and Indian Embassy in Tel Aviv. They have extended full support for promoting Indian IT industry in the region.
- NASSCOM President gave Keynote address at the Israel India Innovation Conference, that was attended by over 350+ companies from Israel and India. She highlighted how India and Israel should collaborate to define new norms of digital world. The keynote help set the tone for the entire program and created excitement about the visiting NASSCOM companies.
- Great insights at Pitango, Israel's largest VC on Israel's leadership in AI, start ups and building the innovation mindset. A key takeaway for our startups, successful business models over great tech.
- Potential partnership with Israeli Advanced Tech Industries on growing the tech partnership between India and Israel; esp. across start ups, skills and policy.
- Great meeting with MassChallenge, one of the leading global accelerators. NASSCOM has partnered with them to provide Indian start-ups with an opportunity for a 3 month acceleration program.
- Great potential for Israeli Cyber companies to set up R&D labs in India
- Inauguration of Indian Pavilion at OurCrowd Investors Summit was done by the Ambassador of India and President of NASSCOM

EMERGING MARKETS

❖ **AUSTRALIA:**

- **NASSCOM Exclusive CIO Roundtable on "Scaling Digital – Imperatives & Impediments"** that saw participation from close to 18 handpicked CIOs & Decision makers representing sectors like CPG, BFSI, Healthcare, Government, Utilities & Real Estate. A 1.5 hr captive session aimed at engaging the End User & Service Provide in a collaborative fashion. Where the End-users opened up and spoke about their priorities, challenges and service providers on enabling clients and capability building. NASSCOM was among one of the very few to have organized the CIO Roundtable - a session appreciated by all participants.
- **NASSCOM Exclusive evening reception** with Padraig Byrne, Sr Analyst at Gartner to help companies understand key technology trends in the A&Z Market. Additionally pre-event interactions helped companies, particularly SMEs, fine tune their pitch & communicate their value proposition rather sharply.
- **Exhibition Space** at a highly visible location in the IT-Expo. Branded as "NASSCOM Country Pavilion" with "Company specific" branding and display areas. There was only one "Country Pavilion" and that too by NASSCOM.
- **Lead Generation** - A total of 173 leads were shared with participants, from those who visited the NASSCOM pavilion & participated in the CIOs Roundtable.
- **Targeted Reach out** – List of attendees (org name & des) at the Symposium was periodically shared before the event to enable well thought through target reach out

Policy Advocacy

NASSCOM's focus is to promote government policies, laws and regulations that enable innovation while protecting consumers. In 2019-20, NASSCOM continued to work closely with the industry and the Government to lead initiatives in policy areas spanning data and internet regulation, economic regulation, digital and cross-border taxation, labour regulations, intellectual property laws, amongst others.

The year saw NASSCOM leading policy efforts across industry sub-segments, and undertaking significant engagement with the Government of India on issues relating to e-Commerce sector, spanning domestic regulations, intermediary exemptions, privacy, data protection and encryption, foreign direct investment policy, etc.; engagement with Government of India and the Organization of Economic Cooperation and Development (**OECD**) on taxation of digital economies; engagement with Government of India on issues relating to labour regulations; and leading policy conversations in areas including drone regulation, artificial intelligence and ethics, amongst others.

A brief overview of NASSCOM's policy advocacy engagements across policy areas in 2019-20, is provided below.

TAXATION

GOODS AND SERVICES TAX (GST)
Since the introduction of GST regime in 2017, NASSCOM has been advocating key issues impacting the IT-BPM sector. In 2019-20, we represented the industry's position on GST -related issues before several forums, and have been working very closely with Central Board of Indirect Taxes and Customs (**CBIC**), Office of the Revenue Secretary, GST Council, State Finance Ministers and the GST Law Review Committee to propose solutions to the issues that our members are facing. CBIC Bangalore recently recognised NASSCOM's efforts towards aiding in creation of an efficient GST ecosystem.

RULES FOR PROFIT ATTRIBUTION TO PERMANENT ESTABLISMENT (PEs)
Taxation of profits attributable to a PE continues to be a matter of global concern. In India, lack of definitive rules under Income Tax Act, 1961 coupled with inconsistent allocation by courts across various cases has increased uncertainty in taxation for non-residents. To address this, Central Board of Direct Taxes (**CBDT**) released a consultation paper to examine existing scheme of profit attribution to PE under Double Taxation Avoidance Agreements (**DTAA**). NASSCOM made detailed submissions to CBDT, suggesting an overall approach for profit attribution to PEs while highlighting the issues that will arise in case of unilateral application of the rules. At the same time, NASSCOM emphasized on the need to have a wider discussion on these issues and suggested that the proposed formula-based approach be made open to deliberation and wider discussion in order to be effective.

ENGAGEMENT WITH OECD AND GOVERNMENT OF INDIA FOR ADDRESSING TAX CHALLENGES ARISING AS A RESULT OF DIGITISATION OF ECONOMY

Since 2016, the OECD has been working to revise existing transfer pricing rules against the backdrop of increased digitization of businesses and remote service. This has been done through the OECD's Base Erosion and Profit Shifting (**BEPS**) Action Plan. In 2019, the OECD published its Programme of Work (**PoW**) to develop a consensus on how to address tax challenges arising from digitalization of economy. NASSCOM made submissions to the OECD highlighting issues and challenges arising as a result of implementation of the proposals envisaged by OECD. We also met officials of Ministry of Finance to highlight the broad level impact of the nexus and profit allocation rule described in the Unified Approach from Indian IT-BPM perspective.

CUSTOMS

In 2019-20, NASSCOM made representations to the Directorate General of Export Promotion (Department of Revenue, Ministry of Finance) on key issues relating to liberalisation of customs regime. We will continue to engage with the government towards resolution of procedural issues with the objective of enabling export promotions.

LABOUR AND COMPLIANCE

LABOUR REFORMS:

In 2019-20, NASSCOM made representations on several labour and compliance related issues that could impact the IT-BPM industry. These include issues pertaining to Supreme Court ruling on Provident Fund, applicability of Standing Orders on IT sector, PF-Aadhaar linkage, Maternity Rules, women working in nights shifts etc. We also made representations to Parliamentary Standing Committee on Labour on the proposed Code on Social Security and Industrial Relations. We will continue our efforts to deeply engage with Central and State Governments towards ensuring a conducive ecosystem for tech industry and its workforce. Given the significant number of developments in this space, NASSCOM also conducted several labour and compliance related workshops, webinars and interactions across India to educate our members on various labour reforms undertaken by Central and State Governments and their likely impact on the technology industry.

COMPANIES ACT:

Listed companies are increasingly subject to more disclosure and transparency requirements while executive compensation is now under greater scrutiny than ever. As a result, Ministry of Corporate Affairs (**MCA**) is adopting practices which will ensure maximum corporate governance to protect interests of investors and other stakeholders. NASSCOM, being committed to promoting a robust corporate governance environment for Indian companies, made several representations to the MCA on relaxation of applicability criteria for Corporate Social Responsibility (**CSR**) including expansion of eligible 'CSR activities, status of CSR notices sent to companies and issues with remuneration disclosure norms to be followed by listed companies.

NASSCOM made submissions to Department of Commerce (**DoC**) to propose concordance between existing SOFTEX Codes and GST codes to make a new list of codes for SOFTEX, thereby easing compliance burden for software exporters and promoting a conducive business environment. We also submitted feedback to DoC on whether IEC should be made mandatory for Services exporters to enable them capture trade related data for services.

DATA, INTERNET AND E-COMMERCE REGULATIONS

DOMESTIC E-COMMERCE:
In 2019-20, NASSCOM engaged extensively with various government departments on issues relating to both domestic and cross-border e-Commerce.

E-Commerce Policy

In February 2019, Department for Promotion of Industry and Internal Trade (**DPIIT**) issued Draft National E-Commerce Policy which contained provisions relating to sharing of E- commerce data, cross-border data flows and sharing of source code with the government. NASSCOM submitted its detailed submissions on the draft Policy in April 2019.

NASSCOM also made a representation to the DPIIT on the industry's vision on a national e-commerce policy, highlighting the need for any potential policy to focus upon four key themes: ease of doing business, competition and innovation, consumer protection, and infrastructure and logistics development. NASSCOM continues to engage with DPIIT on the subject.

E-commerce Guidelines for Consumer Protection

Department of Consumer Affairs (**DoCA**) issued the draft E-Commerce Guidelines for Consumer Protection. NASSCOM made detailed representations and met with officials of the DoCA in relation to the draft Guidelines. In our feedback, we recommended revisiting the obligations on e-Commerce entities to rationalize the obligations imposed upon various e-Commerce entities and make obligations proportionate to the scope of activities of the entity, and the risk of actual consumer harm. In particular, NASSCOM highlighted the need to address disintermediation risks for e-Commerce entities, while at the same time providing consumers with effective redressal under law.

CROSS-BORDER E-COMMERCE:

Export Control Laws

NASSCOM provided detailed inputs on the draft Approach Paper on Intangible Technology Transfer Control Mechanism released by MeitY in May 2019. In our feedback, we highlighted the need for license

exceptions under the current export control laws to make Indian exports globally competitive. We are engaging with the government for further advocacy on this issue.

Customs Moratorium on Electronic Transmissions

NASSCOM was consulted by officials from DPIIT, DoC and the Ministry of Electronics and Information Technology (**MeitY**) on the issue of renewing the extant customs moratorium on electronic transmissions, which has been in place since the 2nd Ministerial Conference of the World Trade Organization (**WTO**) in 1998. With the decision being up for deliberation at the next Ministerial Conference in June 2020, NASSCOM released a detailed industry consultation paper to obtain industry feedback on questions that need to be addressed towards framing the Government of India's position on the issue. We will continue to engage closely with the Government and industry on this issue.

DATA AND INTERNET REGULATIONS

Personal Data Protection

The Personal Data Protection Bill, recommended by the Justice Srikrishna Committee in 2018, was tabled in the Parliament of India. Once enacted, this would be a significant step towards making India a trusted partner in the global digital economy. NASSCOM and DSCI (which was represented on the Committee) have been closely tracking the development of the Bill, and note that the revised draft (PDP Bill, 2019) has undergone some significant changes.

While, the PDP Bill, 2019 takes on board several submissions made by NASSCOM, DSCI and the industry, there remain several concerns and areas which require further clarity. We conducted a four-part Consultation Series with the industry, with sessions conducted in Delhi NCR, Mumbai and Bengaluru. NASSCOM and DSCI continue to engage with the Government to address the industry's concern, and work towards a balanced and workable data protection framework in India.

Intermediary Guidelines

NASSCOM had made detailed submissions to MeitY on the Draft Information Technology Rules, 2018 (Draft Intermediary Guidelines) when they were released for public comment earlier in 2018. In 2019-20, NASSCOM continued its engagement with MeitY on this issue and provided alternative rule-making proposals focused on primary risk of misinformation. In its submissions, NASSCOM recommended maintenance of differential obligations for social media intermediaries, and other non-public intermediaries such as cloud service providers, network service providers, etc. Further, NASSCOM also emphasized the need for an efficient framework to ensure greater collaboration between government agencies and social media intermediaries towards tackling key risks.

INDUSTRY SPECIFIC

TELECOM

In 2019-20, NASSCOM made several recommendations to the Government on the Telecom issues affecting the IT sector related to dark fibers, OSP, cloud computing and IP1 registration etc. Summary of key representations made to the Government is appended below:

NASSCOM recommended abolishment of Other Service Provider (OSP) regime

NASSCOM has been highlighting several challenges with the OSP regime and have been advocating on the need to revisit these requirements in line with the changing business requirements. NASSCOM gave a detailed feedback on review of licensing terms and conditions of OSP registration highlighting how the objectives of the OSP regime are no longer relevant given various technological, business and regulatory advancements that have happened since the OSP Regulations were first introduced and need to abolish this regime altogether towards ease of doing business.

NASSCOM's response to TRAI's Consultation Paper on Cloud Services

In our response, we highlighted that Cloud services are inherently global in nature and the Government should create an enabling regulatory framework and therefore should avoid unnecessary regulatory strictures. We also stressed that any additional regulation, of the kind being proposed in the CP, may result in regulatory overlap with many other existing laws.

FINTECH

During the last year, NASSCOM made several recommendations on issues impacting Fintech sector related to know-your-customer (**KYC**), sandbox framework, promotion of digital payments etc. Some of our recommendations have been accepted by RBI; in particular, recommendations relating to simplifying KYC processes, through methods such as video-KYC. We will continue to engage with RBI in order to enable ease of doing business within this domain.

HEALTH

The year saw NASSCOM actively taking up policy advocacy pertaining to the health sector. We submitted feedback on Ministry of Health and Family Welfare's (MoHFW) draft notification to notify all medical devices under sub-section (b) of section 3 of the Drugs and Cosmetics Act, 1940'. The notification was aimed at aligning the Indian regulatory regime with the global practices. We intend to take this initiative forward and expand our advocacy efforts on other sectors of healthcare as well. NASSCOM is part of MOHFW's Sub-Committee on legal and policy frameworks for the utilization of Artificial Intelligence in public health. We are working to develop better policies in this sector along with other stakeholders.

OTHER POLICY AREAS

INTELLECTUAL PROPERTY RIGHTS (IPR)

Continuing our efforts to ensure a favourable IP ecosystem for the tech industry in India, NASSCOM made representations to the Government on IP issues affecting the industry. We also submitted our feedback on the Draft Patent (Amendment) Rules, 2019 and Draft Copyright (Amendment) Rules 2019 published by DPIIT. In addition, we also organized awareness sessions to educate young entrepreneurs and tech Start-ups to make use of IP laws in India to protect their innovations not just in India, but also in other geographies.

ENGINEERING RESEARCH & DESIGN (ER&D)

Today, Karnataka is the leading destination for ER&D within India and contributes to around 40% of India's ER&D revenues. In September 2019, NASSCOM signed a Memorandum of Understanding (**MOU**) with Karnataka Innovation and Technology Society (**KITS**), Department of IT & BT, Government of Karnataka, to work towards advancement of ER&D sector in the state, in a voluntary, non-exclusive and in a non-binding manner. As part of this engagement, NASSCOM, based on extensive consultation with industry leaders, has built a strategy for the Government of Karnataka to maintain its position as the most preferred destination for ER&D companies and continue to attract more ER&D companies.

BAN ON DIESEL GENERATORS IN NCR REGION

In October 2019, Environment Pollution (Prevention & Control) Authority (**EPCA**) announced ban of usage of diesel generator sets in NCR region from 15th October 2019 to 15th March 2020, as a measure to arrest the rising pollution levels. Considering that, many IT-BPM companies in the NCR region depend on Diesel Generator sets as a back-up power source, it was a cause of concern for the industry. To address the issue, NASSCOM engaged with the relevant authorities in EPCA and the State Governments of Haryana & Uttar Pradesh, presented the level of disruption that this measure would cause to the sector. The State Government of Haryana and Uttar Pradesh appreciated the merit in the argument and have accepted the suggestions made by NASSCOM.

EVENTS

April

GCC Conclave

The NASSCOM GCC Conclave 2019 on **25th & 26th April** in Mumbai witnessed more than 700 participants from across the country. The discussions were built around the **theme "GCCs for tomorrow: The next frontier."** The 3 key pillars powered by GCC were **Alignment, Capability & Talent. Some of the top highlights** of the event were:

- 6 closed door boardroom series for CXO interaction with select start-ups as part of our NIPP start-up connect program.
- Interesting case studies from GCCs on digital transformation
- 23 sessions with 55 speakers from across sectors.
- All time high participation from the start-up community to showcase and speak.
- All time high participation from the Non GCC CXOs as speakers
- 200 submissions for awards as against 100 last year
- All time high social media engagement

May

C Summit

3rd edition of the C-Summit was held in New York on 30th May, 2019 at The Westin Hotel, Times Square. The summit deliberations were themed on **'Leadership Imperatives in an AI powered world'. Some of the top highlights of the event were:**

- Over 180+ clients, 30+ Indian service providers with 30+ speakers
- 84+ one-to-one meetings with the clients were organised on the side-line of the event.
- First time Participation from the US Government and leading labor association on skills panel
- Our social engagement crossed an all-time high with the summit organically trending in the New York's Twitter Top 10 Trends twice.
- Finely orchestrated social media campaign with collaboration from all sponsors
- First ever collaboration between New York Government and NASSCOM- on May 31st, hosted a roundtable on the evolving workforce of the future and how Indian companies operating in the US market can help in bridging the American talent gap. This roundtable was part of our strategic plan to move the narrative for our IT members in the US market.

July

HR Summit

NASSCOM held its 16th edition of the HR Summit at the Hotel ITC Grand Chola in Chennai on July 17th-18th, 2019. The summit deliberations were themed on **'HR Flix: Living the Tomorrow of HR Today'**.

Some of the top highlights of the event were:

- More than 700 delegates joined us from different countries to make our 16th edition of the NASSCOM HR Summit a great success.

- The event was unique and covered the overall HR challenges and solutions with keynotes, fire-side chats, disruptor bytes, round tables, spotlight discussions with the industry leaders.
- We had participation from audience across industries, this 2-day experience created an unforgettable experience.
- The event had a heady mix of industry leaders like Dr. Prince Augustin, CHRO, Mahindra & Mahindra, Manu Wadhwa, CHRO, Sony Pictures Network India, Richard Lobo, Executive Vice President & Human Resources, Infosys and Manisha Agarwal, Head Human Resources, PUMA India.

August

NASSCOM Annual Technology Conference

NASSCOM held its 6th edition of the Annual Technology Summit at the Leela Ambience Hotel, Gurugram on August 26th-27th , 2019. The summit deliberations were themed on **'Industrialization of Disruptive Technologies'.**

Some of the top highlights of the event were:

- More than 1200 delegates participated in the conference from all over India
- A Purist technology conference addressing needs of both - tech leaders & developer community with 7 deep dive sessions(4 Hrs each) on emerging tech & a full day conference
- 45 speakers including eminent thought leaders such as Gargi Dasgupta, CTO, IBM Research, Dan Ternes, CTO Blue Prism, Venkat Padmnabhan, Dy MD, Microsoft addressed the conference
- The First Edition of NATC awards were held to showcase, acknowledge and felicitate the company's scalability & development in Disruptive Technologies. Besides engaging multiple teams & stakeholders (100 participants & 24 awards jury) in one go, the awards process identified potential Unicorns & also felicitated technology companies delivering "Social impact"
- The Conference also featured a Tech Expo wherein 56 organizations showcased their products and services
- The NATC received great feedback from the Tech Community for its content and speakers

September

NASSCOM BPM Strategy Summit

NASSCOM held its 21st edition of the BPM Summit at the Hotel Conrad in Bengaluru on September 5, 2019. The summit deliberations themed on 'GetSet 2020: Powering to sustain disruption'. Some of the highlights of the even were:

- With 300+ delegates from across industries and cities in India & 100+ companies, BPM summit was a great success.
- 12 different sessions, insightful keynotes, disruptor bytes, spread across 4 major themes with 32 speakers and excellence awards encapsulated a differential and exciting day.

- We planted a tree against the name of each speaker in Chikmagalaru, Karnataka and a certificate was given to them on the stage post their sessions.

NASSCOM Engineering & Design Summit

NASSCOM held its 11th edition of the Design & Engineering Summit on the 15th & 16th September at Leela Palace Hotel, Bangalore. It was themed on, Future of Engineering: Designing an Intelligent Eco-system

A landmark occasion as this, witnessed some interesting discussion themes:

- With 600+ attendees, 180 unique companies, 50+ speakers, and 20+ ER&D start-ups, our 11th edition of Design and Engineering summit was a great success.
- Intriguing formats, insightful keynotes, disruptor bytes, spread across 3 key pillars along with tech showcase, roundtable discussions and speed dating sessions made it a truly remarkable summit.
- For the first time we had a tech showcase from 20+ start-ups in the areas of AI, IoT, automation, robotics, analytics, immersive technologies, etc.
- For the first time we had set up our in-house studio. 20+ Focussed interviews with subject matter experts bringing out intriguing facets pertaining to the ER&D ecosystem

October

D&I

NASSCOM held its 12th Edition of the NASSCOM Diversity and Inclusion 2 day summit, held on 22nd and 23rd October

at Conrad Hotel in Bengaluru. The Theme of the Summit was Diversity and Inclusion 3.0: Inclusion for Global Impact.

- Over 620 participants, 60 speakers from over 120 companies participated in the summit. The Summit held 7 keynotes, 8 workshops, 13 Panel Discussions, 10 Diversity and Inclusion showcase Stalls, Awards Announcement, W^2RT Users, Mentor and Guru felicitation and Dance Performance by the Blind.
- 50 participants who are Persons with Disability and LGBTQI persons participated.
- 8 experiential workshops on Inclusive leadership, Generational Diversity, Persons with Disability, LGBTQI, Gender Pay Parity, Creativity and Innovation through Inclusion, Inclusion Score Card, and When Women Thrive, Business Thrive that was conceptualized and facilitated by Wipro, SAP, E&Y, Barclays, Scientific Games, Mercer, and NASSCOM Foundation.
- NASSCOM Corporate Awards for Excellence in Diversity and Inclusion, 2019 recognized 6 winners in Gender Inclusion and Persons with Disability.
- Women Wizard Rule Tech (W^2RT) Certificate felicitation for Users (approx. 100) from 33 companies, mentors (approx. 15) from 10 companies, and Gurus from 3 companies. 2nd Cohort Announcement and call for registrations of the W^2RT program.
- Launch of the Virtual Cell for identifying Skills gap for Defense Veterans and as an interface for the Tech Industry.

November

NASSCOM Product Conclave

16th edition of the NASSCOM Product Conclave (NPC2019) was held on the 5th & 6th November 2019 at Taj Yeshwanthpur, Bangalore. The core theme of this year was 10X Challenge: Scale @ Speed.

Some of the top highlights of the event were:

- 2000+ participants, ~200 speakers, 118 sessions, 150+ curated enterprise meetings, 200+ investor meetings, 140 product companies showcased.
- Well curated sessions proved that content is the king as event unfolded 8 focused summits (Fintech, Healthtech, Retailtech, Mobility, Bharat, SaaS, Prod Mgmt & Design and IoT & Devices) besides mainstage plenary. SaaS and Product Design and Management Summits were outstanding
- The event witnessed diverse participation from global ecosystems – Silicon valley, Canada, Israel, the UK, Japan, Middle East, South Africa; from entrepreneurs, IT services players, startups, enterprises, investors, academicians and government.
- Some new experiments were set up this year - Huddle sessions at ADDA with key speakers, Academia-Industry collaboration roundtable, and masterclasses. Unconventional Speakers!!
- To create social impact, NPC2019 minimized the use of paper and plastic, No print collateral, Maximised eco-friendly means in all productions, Venue and stage PWD friendly
- #NPC2019 was trending in Bangalore on both days; 4035 mentions, 8.8M reach, 40.7M impressions, 1378 contributors

<u>Research Reports</u>

January, 2020

Digital Engineering: An Opportunity Unparalleled

This report is NASSCOM Research publication in collaboration with Everest Group on "Digital Engineering: An Opportunity Unparalleled," which covers both global and Indian digital engineering R&D landscape for the year 2019. The digital engineering market landscape, as brought out in the report, reflects the continued progress and interest the sector has drawn globally. Digital engineering has become the prime priority for enterprises across industries, with a significant portion of global ER&D spending going into creation of smart, connected, and intelligent products. In parallel, leverage of modern technology in the core engineering processes has also been increasing. India is one of the leading locations for delivering digital engineering services. With India eyeing an aggressive ~US$100 billion share in the ER&D global sourcing market spending by 2025, it is imperative to ensure a significant focus and accelerated capability building in the digital engineering space.

January, 2020

AI Pervasiveness in Retail

The retail sector leverages various digital technologies such as Robotics, IoT, AR/VR, etc. While all these technologies have potential to operate in isolation, when combined with AI these technologies get a centralized brain. AI not only complements these technologies, but also acts as a link between them, which allows AI to access data from different systems and deliver real-time insights. Some of the most widely used AI technologies across the retail value chain are Machine Learning, Computer Vision, Conversational AI, Data Science and NLP. Today AI finds application across the retail value chain to address challenges such as demand forecasting, product development, supply chain planning, store operations, campaign management and customer experience.

December, 2019

Uncovering the True Value of AI - Executive AI Playbook for Enterprises

Artificial Intelligence (AI) is recognized and adopted by many organizations as a powerful solution. However, it is yet to be fully exploited. AI - based systems could act as an accelerator for organizations to replicate and scale human attributes like pattern recognition, learning and problem solving effectively and economically for solving complex business challenges. AI can also synergize and accelerate several traditional approaches to business and drive genesis of new business models. This Executive AI Playbook offers a thorough view of how to sense opportunities, measure organizations' readiness and capabilities for AI inception and finally how to execute AI priorities in an organization through a modular strategy.

December, 2019

Quarterly Industry Review-December 2019

Analysis of Indian IT-BPM industry performance during the quarter ending September 2019. This analysis is based on the quarterly results declared by the top listed India-centric IT-BPM companies which comprise over 46% of the industry.

December, 2019

Edge Computing: Towards a More Distributed Future

This whitepaper aims to meet two objectives:
Primer on What is edge computing?: An attempt to give a fairly comprehensive understanding of what edge computing is, so as to increase awareness of this emerging technology.

Highlight what companies in India are doing in this space: Products and services being offered by service providers and start-ups.

It covers trends, business opportunities and strategies adopted to monetize these opportunities.

November, 2019

India, by Design: Perspectives, Trends and Practices-2019

This report covers key trends and themes shaping the current state of design in India, from the perspective of what's changing, why it is becoming important for businesses today, how organizations need to equip themselves for a future by design and the significance of design in India in the global context. It captures practices adopted by leading organizations to drive design as a culture and delivering value by creating human-centered experiences.

November, 2019

Indian Tech Start-up Ecosystem: Leading Tech in the 20s

NASSCOM's report on "Indian Tech Start-up Ecosystem: Leading Tech in the 20s" underlines how Indian start-up ecosystem continues to expand and various elements of the ecosystem are coming together in symphony to give rise to an orchestra of innovation – right from Government support (State and Central), evolution of the investor landscape, increase in participation from the corporates, growth of national digital infrastructure, to incredible global exposure.

November, 2019

Industry 4.0 - A Primer on Startup Driven Industrial Stories

NASSCOM report highlights on the shift from legacy products to emerging technologies like IoT, EV, 3D Printing & the role of Indian startups in driving innovation on the industrial front. It also presents a probable approach to Industry 4.0 through an agile process.

October, 2019

Quarterly Industry Review-September 2019

Analysis of Indian IT-BPM industry performance during the quarter ending June 2019. This analysis is based on the quarterly results declared by the top listed India-centric IT-BPM companies which comprise over 46% of the industry.

September, 2019

Software testing to Digital Quality Assurance: A Paradigm Shift

The report shares a detailed look at the global and Indian trends in software testing with insights for businesses, company boards, testing professionals & other stakeholders. It covers in detail the evolution of testing in the last decade as domain specific testing, Agile/ DevOps, automated testing platforms, new age skillsets for software testers gain credence.

September, 2019

Making Urban Mobility Sustainable, Seamless and Safe

The report highlights the key urban mobility trends and challenges in India, and how it can be improved through technology interventions. The overall aim of the report is to look for ways to achieve a sustainable, seamless and safe urban mobility for the country, which will require greater collaboration between stakeholders.

September, 2019

Voice-based Conversations - Hype or Reality

NASSCOM report titled Voice-based Conversations - Hype or Reality discusses how proliferation of smart speakers and increasing use of voice searches over smartphones is leading to the growth of voice-enabled solutions across consumers and enterprises. The report highlights some of the existing and potential use cases, application areas, challenges, importance for Indian users, etc. It also presents some actionable recommendations for companies engaged in providing solutions in this domain.

August, 2019

Fintech Lending - Unlocking Untapped Potential

NASSCOM's Fintech Lending – "Unlocking Untapped Potential" underlines how Fintech lending market have evolved in recent years. This report focuses entirely on Fintech lending segment under the broader Fintech umbrella. We have traced the evolution of Fintech Lending industry in India while highlighting the key drivers for growth, trends, challenges and opportunities. The report also highlights new business opportunities and key success factors for the Fintech lending industry in India, in addition to identifying bottlenecks faced by the industry, and recommend action steps to unlock the untapped potential of the industry.

August, 2019

Agritech in India - Emerging Trends in 2019

NASSCOM's report titled Agritech in India – Emerging Trends in 2019 underlines transformation and trends in the Indian Agritech Industry. The report covers emerging areas in Agritech with focus on key stakeholders and new business opportunities. Study also analysed Agritech start-up founder's perspective on different issues.

July, 2019

Quarterly Industry Review-July 2019

Analysis of Indian IT-BPM industry performance during the quarter ending December 2018. This analysis is based on the quarterly results declared by the top listed India-centric IT-BPM companies which comprise over 46% of the industry.

July, 2019

AI for good compendium

AI For GOOD, an initiative to unlock promising AI solutions to address some of the most common & complex problems in the public domain, identified Top 25 AI solutions that can change BILLION lives, out of which 10 are selected as TOP 10 AI FOR GOOD Impactors for their practicality, feasibility, scalability and the potential to address Indian challenges.

May, 2019

NASSCOM 2019 CEO Survey Insights

"NASSCOM 2019 CEO Survey Insights" underlines the perspective of Indian CEOs towards global and Indian economies. It was a 2 months survey in which 100+ CEO's from Large & Small Indian IT companies, GCCs and Start-ups participated.

May, 2019

How EdTech can Impact Primary Education in India

"How EdTech can Impact Primary Education in India" highlight the key issues with rural education in India. It also touch upon the impact of technology on this sector and how edtech start-ups can help in tacking these issues.

May, 2019

Growth of Immersive Media- A Reality Check

The report provides an assessment of the current market for Immersive Media both globally and in India. It covers a brief Introduction & Evolution of Immersive Media, Ecosystem Players, Market Size and Growth Estimates, Key Applications and Use Cases, Analysis of the Indian Market, Key demand drivers, Factors limiting growth, along with the key recommendations that may propel the growth of the Immersive Media market in India.

May, 2019

GCC 3.0 - Spotlight on Digital, Partnerships, New Delivery Models & Future Skills

The report in partnership with Zinnov is a compilation of facts, trends, and insights on India GCC landscape, digital transformation, Ecosystem Partnerships, Service delivery models etc. The report examines the evolution of the ecosystem, its growth drivers, and highlights the initiatives of GCCs, Industry bodies, and the Government.

April, 2019

Emerging Technologies: Leading the next wave of IP Creation for India

NASSCOM report titled 'Emerging Technologies: Leading the next wave of IP Creation for India' highlights the patent landscape of Indian companies in the US, with a focus on studying patents filed by companies domiciled in India, including their: domain and application areas of patent filing as well as assignee type.

April, 2019

NASSCOM Cloud: Next Wave of Growth in India 2019

The report, analyses the present and the future state of the India Cloud market, identifies the major technology trends, issues and concerns of the industry in detail. It also analyzes the IaaS & SaaS demand and adoption levels across various industry verticals and the key challenges impacting uptake in India.

March, 2019

NASSCOM Avasant India Blockchain Report 2019

The report, developed through participation and inputs from all stakeholder groups throughout the blockchain value chain, provides a definitive perspective on the current state of the blockchain market and highlights the future direction of the industry both in India and globally. The report seeks to become a definitive reference for a thoughtful and deep assessment on the Indian Blockchain space.

February, 2019

Talent and New ways of working in the age of digital transformation

The whitepaper highlights the difference between doing digital and being digital and that while digital transformation may seem to depend on better algorithms and more advanced hardware, its success rests fundamentally on the innovations of talented people working together.

February, 2019

Strategic Review: IT-BPM Sector in India 2019: Decoding Digital

This report has an in-depth analysis of Indian IT-BPM performance for FY2019 across the five key segments. In our first attempt to formalize the digital business, the report also presents a framework of how companies define digital and the metrics being used to measure digital success.

January, 2019

Through the looking glass: Are IT and ITeS SMEs geared for the next growth wave?

The IT-BPM industry has seen disruptions in recent times with the emergence of digital technologies. Tech small and medium-sized enterprises (SMEs) are well placed to quickly adapt to these changes because of their small team size and agile mindset. While digital technologies are throwing up many business opportunities for SMEs, they continue to face many challenges. Primary challenges include access to capital, talent availability and market conditions. NASSCOM, jointly with PwC, conducted a survey of IT SMEs in India to understand their growth plans, challenges faced, maintenance of competitiveness, etc.

Centre of Excellence- AI and IOT

ABOUT CoE

NASSCOM has established Centers of Excellence (CoEs) in Data Science and Artificial Intelligence (DSAI) and Internet of Things (IoT) on Public-Private Partnership model. The CoEs, supported by Governments and industry, is a nationwide programme to drive innovation and co-creation in Industry 4.0, Automotive, Healthcare, Agriculture, Energy, Banking and Financial Services, Retail, Telecom, and other industry verticals & horizontals.

OBJECTIVES:

A] Provide Infrastructure & Capability
A collective sandbox for experimentation, innovation and problem-solving, combined with providing assistance in building products for startups and innovators.

B] Accelerate Innovation Through Co-Creation & Market Adoption
The Co-Create program is to facilitate deep-dive engagement for fast-track discovery and application of innovative solutions sourced from its network of 1,500+ deep-tech curated Start-ups/SMEs, System Integrators, and Technology companies.

C] Build Thought Leadership

Promotion of best practices, industry standards and carving the path ahead for the industry verticals through CoE-curated events, workshops, forums and roundtables, covering a wide range of topics including healthcare, Industry 4.0 and deep technology areas like computer vision.

<u>**PROVIDING INFRASTRUCTURE AND CAPABILITY**</u>

CoE IoT Gandhinagar inaugurated by Union Minister Ravi Shankar Prasad

After Bengaluru in 2016 and Gurugram in 2018, the 3rd Center of Excellence for IoT & AI was launched in Gandhinagar on 11th September 2019 by Union Minister for Law & Justice, Electronics, IT & Communications Ravi Shankar Prasad, along with Home Minister Pradipsinh Jadeja, Hasmukh Patel, MP of Ahmedabad East and Dr. Kirit Premjibhai Solanki, MP of Ahmedabad West

Launched as a part of the Digital India initiative conceptualized by PM Modi in 2015, the Centres of Excellence have a keen focus on building solutions, catalyzing innovation and working closely with industry leaders in emerging technologies like IoT, AI, AR/VR, Big Data and Precision Analytics.

Several companies including Alluvium, Amnex, Wobot AI, Torchit and Sunbots showcased their solutions to the Minister, who also provided them valuable insights on specific needs of the government, and how their technology solutions could be used for the benefit of the government.

Innovation & Co Creation: Healthcare & Manufacturing

These technologies are increasingly solving challenges being seen commonly in healthcare, agriculture, manufacturing, education, smart city governance, e-governance. Healthcare was identified as a major focus area, and this vertical has grown significantly over the past three years. CoE launched the Lifesciences & Healthcare Innovation Forum (LHIF) – a targeted programme aimed at attracting & enabling India's biggest stakeholders in healthcare, develop programmes to match their synergies, foster innovation and industry co-creation.

Similarly, CoE launched the Forum for Manufacturing, Automation, Digital Transformation & Innovation Excellence (MADE) with the objective of powering digital transformation in manufacturing.

Accelerating Innovation In India's Deeptech Startup Ecosystem:

CoE IoT's ongoing efforts to ramp up the ecosystem with technology-driven startups are growing steadily. In addition, the startup ecosystem is being given a major push by enabling product acceleration, establishing connections for funding, providing mentorship opportunities and develop enterprise connect. The Innovation Labs in Bangalore, Gurugram & Gandhinagar CoEs are state-of-the-art facilities, which are hubs for product startups. These are one of the unique facilities in the respective regions available for product startups to build and develop their technology solutions and offerings.

CoE IoT (Blore, Gurugram, Gandhinagar)	2019 (FY 19-20)
Incubated Startups	104
Startups with Women Founder	15
Societal Projects (By Startups)	42
No of Use Cases (With Incubatees & External Startups)	40
Patents applied and received (By Startups)	18/9
Market Opportunities Provided to Startups	1010
Connections to Overseas Entities	176
Funds raised (including 82 lakhs raised via GoK's Elevate100)	Rs. 134 cr.
Funding Connects	85
Mentoring	64
No. of Startups Funded	28

No. of Partners (Strategic/CoCreate/Innovation/Infra/Technology)	34 (17/2/6/5/4)
Employment Generated	418 + 94
Events Organised & Participated	105
Government/ International Delegations Hosted	137

Forging Strategic Industry Alliances: One of the highlights of the past year includes the various strategic alliances across countries, sectors and industries, in an effort to enhance the capabilities of CoEs across the board.

New Partners:
Agreements have been signed with major enterprises & organisations like JK Lakshmi Cement, Manipal Hospitals, LG Electronics, ACMA, SIAM and L&T Infotech.

ACCELERATE INNOVATION THROUGH CO-CREATION & MARKET ADOPTION

Agritech	Health	IIoT (Aviation/Enterprise/ O&G/Retail)	Others
5	15	12	8

VERTICAL-FOCUSED INITIATIVES

LHIF: Accelerating & Enabling Innovation For India's Next Wave of Healthcare

The Lifesciences & Healthcare Innovation Forum (LHIF) is the NASSCOM CoE IoT's collaborative platform for driving digital transformation. The forum focusses on smart hospitals, wellness, preventive and curative care, universal healthcare for Public, digital transformation (in Pharma, Health Insurance and medical devices Industry). In the past year, LHIF has led multiple innovation-centric activities & engaged a multitude of industry leaders in thought leadership activities to gather the collective voice of the industry, and forge the way ahead for implementation of technology in healthcare.

Early this year, NASSCOM has launched its nation-wide Healthcare Initiative "Discover-Design-Scale" to promote health-tech innovation and to promote digital adoption by the public and private healthcare delivery organizations.

Healthcare Agenda

- Catalyse the transformation of the Lifesciences & Healthcare industry for accelerated and sustained growth, to capture new business opportunities and markets. Building solutions for real world challenges through co-creation programs.
- Develop and nurture an innovation ecosystem with participation of diverse players from healthcare industry.
- Play an active role in bringing affordable, sustainable and scalable healthcare delivery for the citizens, in collaboration with academia, government, industry and start-up eco-system. Leverage our Tech-Partners.

Public Healthcare Initiatives with Government

Currently NASSCOME CoE is engaged with multiple state governments across India. With the support of our partner AstraZeneca, we have already established a metabolic centre at a government hospital in Kochi, to provide a comprehensive care for diabetic patients. A very successful STEMI project was launched in collaboration with Govt. of Goa at multiple government hospitals to provide timely care for the cardio vascular patients. We are also working as a Technology partner in providing best innovative HealthTech solutions to AIIMS Jodhpur, in collaboration with Business Sweden, under government bilateral programs.

Driving Strategic Engagement

LHIF counts AstraZeneca, GE Healthcare & Manipal Hospitals as Strategic Partners. In addition, the forum has forged ties with other leaders such as Cloudnine Group of Hospitals, Narayana Health, NATHEALTH, Apollo Hospitals, National Health Authority among others, to deliberate on measures to enhance innovation & explore cocreation opportunities in technology propulsion.

Driving Policy in Healthcare

LHIF also spearheaded major policy workshops and seminars, namely collating industry feedback on the National Digital Health Blueprint & Regulation of Medtech Devices, Procurement Policies for AI in Healthcare etc.

Healthcare Thought Leadership

In the year 2019, NASSCOM CoE held 2 major events in Bangalore and New Delhi cities, with over 600 representatives from the eco-system participating at these events. LHIF events are held in workshop mode to facilitate active interactions and peer group collaboration. So far, these events deliberated on topics such as; Universal Healthcare, Government initiatives in Healthcare delivery, Skill Building for Healthcare Professionals, Adoption of EHR/EMR, Technology Trends, Impact of Ayushman Bharat on Indian Healthcare delivery, etc.

Focused Effort in Driving Innovation In Manufacturing

Industry 4.0 is not at all a buzz word now, it's very much reality for large enterprises and has become vision for Small & Medium Enterprises. Adoption of digital technologies has seen significant growth in 2019, leading with automation and machines getting augmented with sensors and AI & IoT solutions. CoE is taking a lead in building India's largest collaborative Innovation platform for manufacturing by bringing together Industries, Government, Academia and start-ups. We are working on to create an Industry 4.0 hub at IIT Gandhinagar to enable manufacturing companies learn about how digital technologies can be applied to real world use cases to optimize operations and improve productivity.

Creating awareness on Industry 4.0
We still have big challenge on Industry 4.0 adoption as many organizations still don't have clarity on where and how to start. CEOs and functional heads are looking for ROI and that's where design thinking can play a major role. To address this gap CoE is organizing conferences, roundtables and workshops to create awareness of what Industry 4.0 is how to start the journey. As part of this we did a large event at Ahmedabad on 12th Sept 2019 bringing together 150 + senior leaders from manufacturing, start-ups and government to discuss the industry challenges and success stories from the start-ups. We also did multiple technology workshops across Bangalore, Gandhinagar and Gurugram to educate on how AI & IoT led solutions can be applied to industry use cases.

Driving Strategic Partnerships
NASCCOM CoE Gandhinagar signed a MoU with JK Lakshmi Cement to be their innovation partner and help them to define technology roadmap and getting innovative solutions implemented to make their plants across Gujarat and Rajasthan smarter. As part of this CoE did a design thinking workshops with senior leadership to identify and prioritize the focus areas and detail out the use cases. CoE is in discussion with several other large and mid-size manufacturing companies to have similar partnerships.

Sectoral Councils

Engineering Research & Design ER&D Council

Engineering, Research & Design (ER&D) sourcing market is the fastest growing sector among all the industry sectors in the country. The global ER&D spend stands at USD 1.6 trillion in 2019 and will reach at USD 2 trillion by 2025 growing at a CAGR of ~4-5%. The ER&D sourcing market currently at USD 90Bn and growing at CAGR ~10%, is expected to be valued at USD160 billion by 2025. Assisted by the factors such as: a. Growing acceptance of offshoring as a norm in ER&D, b. Significant investments from global capability centers and service providers in skills, scale and c. technology and Impetus from government and other (traditionally) non-engineering-centric verticals, it could also grow to ~USD 200 billion by the same year. Share of

2025 Outlook:

Indian ER&D has the potential to become USD 100 billion industry with additional 1 Mn workforce by 2025

Indian engineering global sourcing spend was estimated to be ~USD 30 billion and employs about ~700,000 people in 2019 and is expected to grow at a CAGR of 12-13% to reach ~USD 63 billion by 2025. Additional opportunities along with right policy measure such as ease of doing business, IP generation, development infrastructure, taxation sops, alternate skilling, innovative eco systems, corporate accelerators, open innovation platform etc., we expect India's share of the global outsourcing to reach at USD100Bn and it will create additional ~1Mn to 1.25 Mn ER&D employment in the country by 2025 .

ER&D Council Priorities

Skilling: To create alternate industry ready talent || Initiate FSIPD 2.0 and promote industry academia collaboration. Leverage IPs generated by the academia.

Market Development: Open up Germanics and Japan market for the Indian engineering organizations

Positioning: Reimagine India's ER&D capabilities in the priority segments in domestic and overseas market - Automotive | Aerospace | Energy | Industrial | Semiconductor |Telecom

The council has organized itself into following 7 workgroups to work on the priorities

1. Business Growth – Identify growth markets, market penetration and creating access
2. Innovation & Research – Improve IP generation & encourage applied research
3. Giving to the Nation – Work on sustainable engineering opportunities along with other stakeholders (Industry, Startups, academia etc)
4. Academia & Skilling: Preparing alternate industry ready talent, collaborate with industry & academia to bring relevant courses, train the trainer
5. Startups & SMEs – Mentoring engineering startups & SMEs to realize their potential
6. Branding & Positioning – focusses on positioning India as the global ER&D hub
7. Policy & Regulations – Works on policies suggestion for ease of doing business, promoting innovation etc.

Key Achievements, Initiatives & Programs

MoU's Signed

1. **Government of Karnataka:** Signed an agreement in September 2019 to work together towards advancement of ER&D in the state. The areas of engagement will involve bringing out a positioning paper for the industry, create policies to enable more IP filing

from the state, incentives to attract global and Indian companies in the state, promoting local business at global forums, Setting up a high-powered think tank in Karnataka for ER&D which includes the best experts from Industry and academia, take part in relevant global roadshows and promote business.

2. **IIT Kanpur : Signed an agreement in Nov 2019 to c**ollaborate with IIT Kanpur in facilitating IPRs usage by ER&D members, co-develop cutting edge technologies & innovations leveraging core competencies of IIT Kanpur, Undertaking joint research, submission of proposals for co-funding, facilitation in engagement with students & ER&D members etc.

NASSCOM Design & Engineering Summit 2019

11th edition of Design & Engineering Summit with the theme of *Future of Engineering- Designing an Intelligent Ecosystem. Key highlights of the summit*

- 100+ organisations with 500+ delegates representing the ER&D Industry- Automotive | Aerospace | Energy | ICT | Consumer Electronics | Industrial Machinery |Construction and Heavy engineering
- 30+ sessions with 40+ Global & Indian prominent speakers from the ER&D Industry
- 20 Start-ups showcasing their innovative products/ solutions and a Startup connect session through Speed Dating- in collaboration with NIPP
- 4 Focus Group Round Table Sessions aligning to the $100 Billion Goal- Branding & Positioning | Business Growth | Future Skills | Innovation & Research
- GCC Round-Table Conference focusing on Redefining KRAs for India Centre | Leveraging India's Innovation Ecosystem | Investing in Future Talent & Scaling up

Market Access – Germanics & Japan

- NASSCOM ER&D Delegation to Germany and France – Multi-City Roadshow
- ER&D in collaboration with GTD took 14 ER&D companies for a multi-city roadshow event in Germany & France to explore business opportunities.
- 25 companies participated in the program from Germany and 14 companies participated from France in the program and generated 5+ leads for the Indian engineering companies.
- Followup program is scheduled in March 2020 in the same region.

NASSCOM participated in CEATEC event held in Japan during October 2019. One of the key aspects of this event is the participation of start-ups from India at the event and position Indian engineering capabilities at the forum. ER&D leaders participated in the round table discussion at CEATEC, Makuhari Messe and delivered key notes on the Indian ER&D capabilities.

Research

ER&D in collaboration with research team has initiated a study on Digital Engineering – the Next wave of growth: Opportunities and recommendations for Indian ER&D GCCs & ESPs to be global leader in respective segments.

Worked with McKinsey, Everest & Zinnov to bring out opportunities, key challenges, focus areas, key recommendations to achieve the vision of becoming a USD 100 billion industry with 1million+ workforce by 2025.

Policy

ER&D through multiple stakeholder consultation meetings with industry and in collaboration with policy team brought out key policy recommendations for GoI and state governments to enable India as global ER&D hub. Polices involve – improve ease of doing business, providing tax breaks for R&D spends, grants & incentives innovation cluster etc.

Positioning

High impact media imprints both print media and online media – Coverage to leading engineering innovations and thought leadership on changings trends in leading print media's and high visible online portals.

Initiated Engineering Innovation awards for the ER&D community and is scheduled for March 2020.

Member Engagement across all regions

- ER&D council hosted over 30+ sessions/ Tech series/ Webinars/ Workshops/ CxO Roundtables across all regions (Bangalore, Pune, Chennai, Hyderabad, Delhi)
- Key focus for the discussions is to adopt best practices in engineering product development, innovation, future technologies
- 6+ Start-up engagement sessions with industry leaders

BPM Council

The BPM industry has transitioned into BPM 4.0 and the differentiator has been from services to solutions. With a mind-set of embracing risk and becoming strategic partners with clients and streamlining end-to-end solutions. Also India has been unsurpassable when it comes to talent, with diverse domain expertise which re-engineers the value chain. Even in terms of and quality and cost the industry stands firm.

2025 Outlook:

McKinsey estimates that the core Digital Sectors could grow significantly faster than GDP, and contribute in the range of $355 billion to $435 billion, accounting for 8 to 10 % of India's GDP in 2025. IT-BPM will contribute to more than 57% of the total Revenue

Source: McKinsey Global Institute, Digital India: Technology to transform a connected nation, 2019

Key Growth Enablers-

- Reinvention of existing service lines & creation of new lines
- Alignment of Investment portfolios with new tech demand
- India will have to have a cohesive talent strategy
- Indian IT-BPM will need to strengthen relationships with end-user industries who will increasingly look for technological expertise
- New geographic markets will need to be opened up, and substantial infrastructure improvement is required at a national level to tap the opportunities
- Driving innovation through increased R&D expenses and start-ups
- Favourable software export policies

BPM Council Priorities

Repositioning: Think Digital Think India

- Analysts connect sessions
- Service provider-client sessions
- Thought leadership Summits
- Communicating the competencies and capabilities of India from a BPM lens

Skilling: 20,000 Digitally Trained Professionals

- Digital projects more skill intensive than people intensive; companies need continuous reskilling with consulting and design capabilities
- By 2022, no less than 54% of all employees will require significant re-skilling and upskilling.
- Of the 4 million jobs in the industry today, the nature of 60-65% is likely to change over the next 5 years.
- Solving the common denominator problem

Policy: Help with issues that the industry is facing

- GST issues
- Work from home policy
- Regulatory and Compliance on Wage and PF

Key Achievements, Initiatives & Programs :

NASSCOM BPM Strategy Summit 2019 –

-     NASSCOM hosted the NASSCOM BPM Strategy Summit in September 2019 in Bangalore.
-     The overarching theme of the conference was 'Powering to Sustain Disruption'
-     The conference focussed on discussions around Strategy in the Digital Age
-     An attendance of 350 plus delegates

NASSCOM C Summit 2019

-     NASSCOM hosted the 3rd edition of C Summit in May 2019 in New York
- We had BPM leaders present at the summit to drive thought leadership, it was also a conference where potential client meetings were organised.
-     The theme was leadership imperatives in an AI powered world

NASSCOM BPM Award 2019

- NASSCOM hosted BPM awards for the third year in a row at the side lines of BPM Strategy Conclave 2019 to acknowledge, showcase and recognize the games changers in the BPM space.
- The awards were given in four categories: Transformation, Return on Investment, RPA Implementation, Process Improvement and Efficiency.
- We received over 150 applications from BPM's pan India

Member Engagement across all regions

- NASSCOM BPM forum hosted over 50 Sessions / Workshops/Masterclasses in 2019 across all regions (Pune, Mumbai, Bangalore, Hyderabad, Chennai, Delhi).
- Key areas of focus for discussions were around Technology, Compliance, Regulatory, Data Security, Skilling, Pioneering technology

GCC Council

India is the No 1 destination to set up Global Capability Centre's (GCCs) with **~ 1250 GCC's** in India with **~ 650 are Medium to large** . **GCCs** employ ~ **1 Million** direct workforce and generating ~ **28.30 billion US$ GCC Revenues which is one-fifth** of IT-BPM exports. Increasingly more and more **European and Japanese MNC's** are setting up their GCC in India and are focussed on **Innovation, Automation, R&D and Product development. North America** still continues to be dominant region with **64% of the GCCs in 2019** as compared to **76% in 2012.**

Evolving to become Global Capability Centres:

GCCs must focus on **six key priorities** over the next two to three years to move from Routine to Critical:

- **Core Functions** - Seek to become a leader within the enterprise that shapes key market sensing/ customer facing core functions, in addition to support functions/ operations

- **Talent Factory** - Invest in high-quality leadership and become a world class talent factory with deep domain expertise, strong mid-management and technical skills, exporting talent to the rest of the enterprise
- **Traditional IT and Digital** - Be at the heart of the organization for Digital IT, while ensuring traditional IT is ready for the digital age.
- **Innovation, Data and analytics**. Become the analytics center of excellence that generates sustainable competitive advantage for the enterprise – at least in the functions where the GCCs play a role
- **Sustained cost excellence**. Continue to be the lowest cost/ efficient center in the organization by being at the vanguard of driving productivity levers (automation, lean, AI etc.)
- **Ways of working**. Adopt Agile ways of working and leverage the DevOps paradigm to increase collaboration and value creation

Long Range Vision:

GCCs - Growth Drivers for the Global Enterprise

Objectives & Priorities:

Position India as the strategic digital capability development country than Cost/Skills

Create a robust ecosystem for existing GCC's to grow and create a "Pull Factor" for new GCCs to set up in India. Increase the GCC footprint with Digital capabilities beyond cost and talent arbitrage.

- GCC capability document for top 5 segments of Retail/ CPG, BFSI, Healthcare, Internet Commerce / Travel & Leisure- narrative from Cost Arbitrage to Value Addition to Value Creation and from Routine to Critical.
- Drive strong PR through research reports / studies on capabilities that can be built from India GCCs to drive Enterprise growth
- Best practice sharing and learning through Workshops/ knowledge session for capability development
- Make GCC summit a global class with global buyers participating
- Drive Innovation through Start-up and GCC / Enterprise connects, Industry –FS/ Academia program
- How can GCCs contribute to the Nation using technology? Help solve issues like Digital literacy, River / Lakes cleaning and rejuvenation, Women safety etc
- Facilitate strong Enterprise and Start-up connect
- Drive the Skilling and Re-Skilling agenda for GCC's through Future Skills & SSC.
- Be the first port of landing for any issues relating to Legal, Regulatory or Compliance

Key Achievements, Initiatives & Programs :

NASSCOM GIC Conclave 2019

- NASSCOM hosted the 9th edition of NASSCOM GCC Conclave in April 2019 in Bangalore.
- The overarching theme of the conference was "GCCs for Tomorrow: The Next Frontier"
- The conference focused on discussions around Strategy in the Digital Age: Navigating Disruption and Accelerating Growth; Digital is at the heart of every organization today but how giant companies are accelerating their transformation to enter the Golden decade of digital
- The confluence was very well attended with over 800 Senior Delegates from 175 GCC's across India.

- Sponsorships in terms Sponsorship amount raised and Number of GCC's who attended was the highest till date. Crossed the Rs 3 crore sponsorship mark for the first time.

Start-up engagement –

- Facilitate Enterprise connect programs for GCC's through Start-up Connect Program's.
- Multiple Start-ups are working on POC's on problem statements given by GCC's. 4 New GCC members added for NIPP program.
- NASSCOM hosted various Start-up Connect programs in Bangalore, Delhi, Mumbai, Pune, Chennai and Hyderabad to facilitate partnerships and collaborations between the GIC Community and Start-ups.

NASSCOM GCC Award 2019

- NASSCOM hosted GCC awards for the second year in a row at the side lines of GCC Conclave 2019 to acknowledge, showcase and recognize the contribution of GCC's to the IT, BPM sector.
- The awards were given in 4 categories – Transformation Catalyst, Innovation – Product and Process, Learning and Skill Development and Organisational Excellence.
- We received over 180 applications from GCC's across all regions.
- We had external Jury and the awards were given to 20 GCC's after a fair and matrix driven assessment.

Member Engagement across all regions

- NASSCOM GCC forum hosted over 50 Sessions / Workshops/Masterclasses in 2019 across all regions (Pune, Mumbai, Bangalore, Hyderabad, Chennai, Delhi).
- Key areas of focus for discussions were around Technology, Compliance, Regulatory, Data Security, CSR, HR and Skilling.
- NASSCOM GCC National and Regional Council was the driving force behind conducting calanderised initiatives and activities across all regions.

Research Reports

- Compendium of Best case studies from GCCs in India on Digital Transformation and Innovation
- NASSCOM-Zinnov study on "GCC 3.0- Spotlight on Digital, Partnerships, New Business Models and Future Skills". This report Our report traces this evolution of GCCs from being single-function to multi-function centres, local to global governance, delivery focused to business focused while at the same time focusing on digital transformation.
- Mid-Level Leadership program being built with ISB (Under process) to get deeper into learning, gathering intelligence, and assessing unique, as well as, common organizational requirements in leadership upskilling, capability building, and managing existing and imminent gaps in the emerging leadership talent across GCCs in India.

ONE NASSCOM - Engagement with NF, DSCI and SSC

- GCC Member companies were actively engaged with NASSCOM Foundation to drive CSR initiatives through programs like National Digital Literacy Mission (NDLM), Big Bridge, Social Innovation etc.
- Data security is one of the key focus areas for GCC's and the forum and all regions worked with Data Security Council of India (DSCI) on various initiatives from education to awareness on Data / Cyber security
- GCC's are actively working with NASSCOM Sector Skills Councils (SSC) on skilling, reskilling and upskilling initiatives. 5 GCCs have signed up for Future Skills program – BNY Mellon, General Mills, Colyrut, John Deere and Prudential.

GCCs at NASSCOM National conferences in 2019 –

- Participation of GCCs was amongst the highest in terms of number of delegates and sponsorships at NASSCOM Annual calendar conferences like NILF, Engineering, HR , BPM , India FinTEch Day and Big Data Summit.
- Senior Leaders from Head Quarters of Parent organisations attended and spoke at NASSCOM conferences

What can GCCs contribute to solve Nations problems –

- Bangalore GCC Council is working on Rejuvenation of Lakes in the city and nearby areas. 20 GCCs have committed to contribute financially through their CSR spend and also in terms of volunteering. This project should go live in April 2020 with the help and support of the GCC community in Bangalore.
- Hyderabad GCC Council is working on "Women safety" by building an "app" for instant alert and help. Volunteering model from various GCCs is also being worked on for this initiative.

IT Services Council

SME Council

NASSCOM SME Council Objective: To build a thriving ecosystem of small and mid-sized technology companies that would together create leading-edge technology and business solutions for the world.

SME Council the youngest council in NASSCOM elected its 2nd council member with nomination for PAN India in June 2019. 2nd SME Council is represented by 18 strong members from metros and tier 2 locations. As we know 85% of NASSCOM Members i.e 2500+ falls under SME Category which makes SME council as most prominent and strong council. And we all understand that the Indian SME sector has a lot of potential for growth in the coming years with respect to IT Export, job creation, entrepreneurial spirit, and innovation.

Considering the challenges and needs for the SME members in current market, the council's Vision and Objective have aligned to solve few of these challenges and take the entire community to a next level.

The Key priorities of this Council is to bring the ecosystem to a closer group

A.   **Market Access,**
B.   **Build Talent Capabilities**
C.   **Member Collaboration**

Under these pillar we had multiple Initiative planned and executed for this financial year across PAN India.

A.   <u>Market Access:</u>

- **CIO Connect Program**: CIO Connect sessions with an objective to identify key challenges & technology intervention opportunities that can be fulfilled by the mid- size service providers (Small & Medium Enterprises - SMEs). Identifies key technology intervention opportunities that can be fulfilled by our SME members and Mentors SMEs to serve the industry better.
- 6 sessions, with 90+ SMEs pitching and 60+ CXOs participating, from BFSI, Retail, Manufacturing verticals.

Successful Case Studies from these sessions:

- **<u>Yellow Messenger:</u>**
The team is in discussions with SBI and Yes Bank as of now, exploring the scope of work where they can collaborate. As of now, negotiations are on, however, no concrete signed deal has materialized at present.

    - **Unitforce Technologies Consulting Pvt Ltd -** They are in touch with SBI, Yes Bank and Prudential Global Services. They are developing an application for Bharati Axa Insurance Company and plan to run a demo of the application for SBI as well to further elaborate on the kind of services they can offer to SBI.
    - **<u>Suyati Technologies Pvt Ltd</u>** - Suyati team is in discussions with Nilendu Bose of Prudential Global Services. They have had a number of interactions and are in process of shaping thoughts around how they can work on certain aspects together.
    - **<u>Ray Biztech</u>** - Prajnajit Mohanty, Chief Decision Scientist of Ray Biztech, has had insightful one-on-one discussions with Prema Jaiswal of Caspian Impact Investments and Seema Gaur of Iffco Tokio. They are positive that something tangible, in terms of business, will shape up soon.
    - **mPhatek Systems Pvt Ltd:** The team has been in constant touch with SBI and have conducted numerous meetings. They have reached an understanding and are gearing up to organize a demo soon. As per their on-going conversations, they will be signing a business contract soon.

Gitex 2019 - 06th – 10th Oct 2019, Dubai.

NASSCOM participated at Gitex 2019, for the third consecutive year, at the Boldest and the biggest tech event in MENA, 39th GITEX Technology Week 2019 at Dubai, UAE. NASSCOM, with its 29 member-organizations delegation, made an IMPACTFUL Indian IT presence felt at GITEX 2019. NASSCOM during the five days Global Tech conference collaborated with multiple partners on facilitating focused meetings, discussions, briefing sessions, and visibility for the participating companies.

- GITEX 2019 was inaugurated at 10:00 hours, followed by a formal inauguration of the NASSCOM Pavilion by Mr. Rahul Srivastava - Consul (Visa & Commerce), Consul General of India Office along

with Mr. Hanuman Tripathi, NASSCOM EC Member & SME Council Chair. NASSCOM was Glad to host Mr. M.Vijayakumar., I.A.S. "ELCOT M.D" during GITEX Week at NASSCOM Pavilion.

- NASSCOM delegates had meeting with the Bahrain Economic Development Board (EDB) and Bahraini business delegation to explore mutual business partnership.
- Dinner meeting hosted by IBPC (Indian Business and Professional Council, Dubai chamber of Commerce and Industry) with around 75+ Dubai based end Customers was much appreciated by members.
- NASSCOM team connected with the Russian, North African & Malaysian Government officials to explore the opportunities for NASSCOM member and pitched for the NISC 2020.
- NASSCOM delegation made a visit to the Dubai Internet City (DIC). During this visit a presentation was made by DIC officials giving the details of the NASSCOM - DIC partnership for soft-landing.
- 50% of the delegation confirmed to be part of NASSCOM's delegation for GITEX 2020.

This is what our participants had to say:

- Mr. Sambhu Lakshmanan; RedBlackTree Technologies, Chennai:

"Our experience has been fantastic. We have got a few leads and hopefully concrete projects and business relationships will materialize out of this delegation in the coming months and we will most likely attend GITEX next year."

- Mr. Deepak Kagliwal; Blazeclan Technologies, Pune:

"Dear NASSCOM Team, Thank you for all the support during the entire event right from the start till end. Your efforts are truly appreciated and we look forward to many more events in future."

- M.V Subramanian; Future Focus Infotech Pvt Ltd, Chennai:

"NASSCOM Team was very supportive and participative. I had an opportunity for addressing Turkey Association and its members. They are keenly interested to participate in NISC 2020.

- Mr. Muthu Ramalingam; Hello Leads, Chennai:

"Big thanks to NASSCOM Team for putting up things for GITEX. We all enjoyed meeting fellow members and it was wonderful exhibiting together."

- Mr. Parimal D; Cloudstrats, Maharashtra:

"Thankyou NASSCOM team for organizing this event and ensuring all minute details being taken care of. Splendid experience!"

- Mr.Haresh Agarwal ; Softcruise Technologies Pvt Ltd; Agra,NCR

"We had excellent experience and great branding done by NASSCOM, would like to have bigger space next year!"

B.   Build Talent Capabilities

- Digital Tech Adoption - 4 Sessions PAN India (Bangalore / Hyderabad / Trivandrum and Coimbatore) with 150+ Members impacted.
    - "Digital Transformation workshop" for our SMEs. Indian SMEs are ripe for Digital Transformation. Every SME in India need to improve their Customer experience, Operational Process and Business Model to compete better. During these workshop, speaker imparted the benefits of Digital Transformation, and helped SMEs to realize that it is not just about using software for your

operations, but Digital Transformation is more about increasing your digital capabilities to grow revenue, reduce cost, Integration of business and IT and become a leader in your business.

Key Take aways of the session :

- 1-1 discussion with the speaker on the anatomy of Digital Disruption.
- Good understanding of digital technologies that matter and how they work together.
- Understanding of how leaders and competitors are using digital technologies to advance themselves.
- Identify disruptive opportunities specific to your organization by leveraging digital.
- A solid digital strategy ready for execution.

- **Industry 4.0 program (WIP)** – Partnered with Fraunhofer, German partner to Co-create and facilitate an enabling framework of multi-stakeholder participation in an Indian National Platform/CoE on Industry 4.0, with the aim to fast track its adoption and implementation.

- **Sales Org Development Program (WIP)** –Sales Org. Development is one of the key NASSCOM SME initiatives, designed to help our SME members build their Internal Sales Operations that would catalyse more lead generation, build their sales pipeline thus, accelerating overall organization growth.

C.   Member Collaboration

•   **SME Advantage Program (WIP):** The SME Advantage program is an SME Council initiative, designed exclusively for NASSCOM members. It comprises of a consolidated set of services that will be offered to our SMEs at a subsidized price with an objective to reduce their operational costs and increase their indirect ROI.

As the first component of the SME Advantage program, NASSCOM has structured and negotiated an exclusive health insurance plan, developed in collaboration with Religare Health Insurance Company Limited.

Please note that under the scope of the SME Advantage program, this is the first of the series of other benefits that we plan to add like: Cloud services, hardware support, antivirus software, working capital provision etc.

•   **Mentorship Program DISHA:** The Objective of DISHA is what can be achieved when large businesses share their insight with our small businesses to improve their productivity and help them grow. We recognize that mentoring can play a huge role in helping businesses grow and is a proven way to help ambitious leaders become even more successful.

Mentees enrolled in this program will benefit from expert support and advice over a six-month period to help them improve the productivity of their firms. Mentors will offer their personal expertise, inspiration and practical advice on a one-to-one basis to help firms overcome any potential barrier to growth.

Programs first Phase started in MP and Chandigarh followed by TN and other location in coming months.

India Market Development

<u>Maharashtra Unveils the Maha Model RFP</u>

In a bid to ensure Ease of Doing business and engaging the IT industry to participate whole heartedly for public procurement, Ministry of Electronics & IT (MeitY) unveiled the Model RFP in June 2017. Through the Model RFP, MeitY aimed to make available standardized RFP templates, covering the various types of procurements for e-Governance projects including NeGP, along with toolkit and guidance notes, to act as both reference and guidance documents to the Line Departments and State Governments in procurements relating to e-Governance Projects and to bring about uniformity in approach in respect of common issues and minimize contractual disputes. The pedagogy of standardisation ensures:

a)   Promoting a common approach to key and common issues in e-Governance RFPs including risk allocation and consistency across e-Governance Projects

b)   Enshrining both domestic and international best practice in the development of RFPs

c)   Reducing the time and costs of developing such contracts in new and ongoing e-Governance projects.

Model RFP is a Central Government Advisory document issued by MeitY that has been aligned with the General Financial Rule (GFR) 2017, CVC Guidelines and other relevant Government notifications and is in adherence to latest e-Governance Standards. The Model RFP documents consists of Model RFP Template, Sample Contract Agreement and Guidance Notes. NASSCOM led the discussions from the industry and in collaboration with MeitY has developed the Model RFP.

During NASSCOM Technology Leadership Forum (NTLF) – 2019- Maharashtra declared its commitment to lead the Digital India Mission and promised to implement IT Procurement reforms in the state. Delivering on the promise, Maharashtra in September 2019 became the first state to implement by mandating all the IT departments to ensure procurement vide the Maharashtra Model RFP.

NASSCOM has been at the forefront along with the Department of IT Government of Maharashtra to enrich and update the Model RFP to come up with the Maharashtra Model RFP keeping in view the priorities, vision and technology landscape of the future.

The Maharashtra Model RFP (Maha Model RFP) provides a template for any IT System Integration project with the government wherein the broader framework of legal terms, arbitration procedures, Bid process evaluation, payment terms and schedules remain same. It is a reference document that addresses the common areas of all projects has the potential to be the procurement Holy Grail.

With advancements in technology and new age trends in terms of Artificial Intelligence (AI), Internet of Things (IoT), Cloud Computing, Blockchain becoming the order of the day, a progressive IT procurement policy provides a distinct and clear advantage to the state of Maharashtra that will now witness timely, effective and efficient delivery of e-governance programmes at all levels in the state.

Technology Partnership of NASSCOM & Government of Madhya Pradesh

In our endeavour to deepen footprint in Focus States, NASSCOM has signed a strategic multi-year partnership with Govt. of Madhya Pradesh to harness IT /Tech industry eco-system in the state & to help accelerate its journey of Digital Transformation. This partnership was formalized at the Magnificent MP event in Indore on 19th October.

With a three year engagement and over INR 2.5 Crores investment, this partnership aims at: Driving adoption of multi-lateral emerging technologies (AI, Blockchain, Data Analytics and Cloud) in key priority areas of Governance, Agriculture, Health etc by:

  o   Leveraging advisory support from NASSCOM to help the state fulfil its disruptive tech requirements via Start-up Procurement Framework

  o   Enabling the state to devise a Cyber Security Policy framework for ensuring prevention, response , forensic strategy and related infrastructure against possible Cyber-attacks to critical IT assets, data and systems

  o   Implementation of future ready & progressive procurement guideline which will play a huge role in attracting IT industry players to participate in MP's Digital Transformation programs.

Furthermore, NASSCOM has received Expression of Interest (EOI) from other State Governments such as Odisha, Chhattisgarh, Assam, and Kerala to work in the area of Model RFP procurement framework for System Integration projects, Adoption of Emerging Technologies, State ICT policy and Capability building & skill development. With these engagements, NASSCOM is looking to deepen its relationship with different States thus acting as a catalyst for holistic development Indian IT sector.

Product Council

With the new council at helm, the NASSCOM Product had a highly engaging year. National Policy on Software Product Policy had set an ambitious goal of growing 10 times by 2025. The 2019 has been focused on to come with strategies for 10x growth challenge entering into new Techade with a mission to realise that dream. We started the year with following objectives:

  •   Strengthen DeepTech Ecosystem: Nurture and mentor Deep Tech product companies from India under DeepTech Club program

- Showcase and Evangelisation: Regional and National Product Conclaves, Emerge50 awards
- Skill-Development: expanding online and offline programs on key themes that help to build capabilities of product companies in India
- Build micro-communities to create cross-linkage among product companies and other stakeholders

DeepTech Club (DTC):

The program is specially designed to catalyse and help scale selected DeepTech Products using mentorship and curated connect with enterprises and investors and providing support in global outreach.

2nd cohort of 20 companies graduated and 3rd cohort of 26 companies was inducted after a rigorous evaluation by industry experts from a pool of 350+ application. While these companies are undergoing a KPI driven mentoring, the process to build 4th cohort is going on.

NASSCOM DeepTech Confluence in Delhi/NCR (29th Jan) and in Bangalore (27th Feb) will showcase these companies, introduce them to enterprises and investors in an extensively curated 1:1 meeting format. There are 50+ enterprises and same number of investors registered to participate and the confluence is going to witness 1500+ meetings with NASSCOM mentored companies.

NASSCOM is setting up a pavilion at the AI Everything expo, Dubai (10-11 March) showcasing 15 Indian SME product companies at the international show to expose them to global business in focussed B2B networking and partner connect in middleeast.

More info about the program, mentee batches and mentors are available on [*www.nasscom.in/deeptechclub/*](http://www.nasscom.in/deeptechclub/)

Showcase and Evangelization:

NASSCOM Product Conclave, Hyderabad | 12th July 2019
6th NASSCOM Product Conclave (https://www.nasscom.in/npc-hyderabad/) was themed on – *Scale to Impact*… addressing some hard questions like the IMPACT the business is making, solving real-life problems, SCALE to cater to the growing world population and its ability to adapt faster to digitisation and to meet the every changing business requirements. #NPCHyd was attended by 450+ Delegates, 45+ Speakers across 5 tracks with 30+ product showcases and a lot of Enterprise and investor connects. Some of the other firsts attempted this year which received a good feedback were
- Investor Series Master class for HNI's and Prospective Investor s to propel investment community in Hyderabad, Workshop on Practical Design Thinking.

- Some interesting track were CASE (Connected-Autonomous-Shared-Electric), Agritech, RetailTech and HealthTech with enterprise customers among speakers sharing there expectation and industry directions where product business leaders should focus upon.

NASSCOM Product Conclave, Bangalore | 5-6 November 2019
16th edition of the NASSCOM Product Conclave (http://productconclave.in/) was held on the 5th & 6th November at Taj Yeshwantpur, Bangalore. The theme of the year was **10X challenge: Scale @ Speed.** Some of the top highlights of the event were:

- 2000+ participants, ~200 speakers, 118 sessions, 150+ curated enterprise meetings, 200+ investor meetings, 140 product companies showcased.
- Well curated sessions proved that content is the king as event unfolded **8 focused summits** (Fintech, Healthtech, Retailtech, Mobility, Bharat, SaaS, Prod Mgmt & Design and IoT & Devices) besides mainstage plenary**.**
- The event witnessed **diverse participation from global ecosystems** – Silicon valley, Canada, Israel, the UK, Japan, Middle East, South Africa; from entrepreneurs, IT services players, startups, enterprises, investors, academicians and government.
- Some new experiments were set up this year - Huddle sessions at **ADDA** with key speakers, **Academia-Industry collaboration roundtable**, and **masterclasses. Unconventional Speakers!!**
- To create social impact, NPC2019 minimized the use of paper and plastic, No print collateral, Maximised eco-friendly means in all productions, Venue and stage PWD friendly.
- **#NPC2019** was trending in Bangalore on both days; **4035 mentions, 8.8M reach, 40.7M impressions, 1378 contributors.**

11th NASSCOM Emerge 50 2019

Emerge50 awards were announced and winners were felicitated during #NPC2019 in all new reformed avatar building up as category wise awards in identified 10 categories – Enterprise SaaS, Retail Tech, Fintech, Logistics, Bharat, Healthtech, Cyber Security, Hardware & IoT and Strategic Sectors.

The about 650 nominations were screened and scrutinised on more than 30 business, innovation and technology parameters by Grant Thornton. Such shortlisted companies went through a jury round where shortlisted companies pitched to category jury. After rigorous jury evaluation and rating, Emerge 50 were finalized and top scorer in each category or as we called them, the Category Leaders formed the League of 10. Emerge 50 winners engaged in DTC, NPC, NIPP, and other programs across NASSCOM. More about the awards and details of awardees are available on http://product.nasscom.in/emerge50.php.

Skill-Development

NASSCOM Product Skill-dev Program aims to Reskill /upskill the product community for future readiness and to scale product businesses using various initiatives like webinars, workshops and virtual panel discussions. – www.nasscom.in/skill-dev. We conducted 29 webinars thriving to engage on latest and futuristic technology, product and business problems & solutions relevant to product companies. Over 8,000 product enthusiasts attended the skilling programs.

In an extension to the 10 tech skills FutureSkills platform, a Product channel was also added on the platform to reskill/upskill the IT workforce on product management. Content generated from the skill development webinars and workshops is being made available on the FutureSkills' product channel in structured curriculam fashion for larger consumption and benefit of overall IT workforce.

The webinars included:
- **Product Management Webinar Series:** started in Dec 2018, the ongoing series has completed 15 episodes. Each webinar was attended by 90-280 people with an average attendance of 150 people.
- *Data Science Learning Series* had one closing session conducted on 8th May and the II series will begin soon.
- *GTM* series completed 10 episodes comprising topics like value selling, social selling, and positive selling, so on & so forth.
- The *Blockchain* series included on-demand topics like Decentralization and the Importance of Blockchain, DIY Blockchain – Make your own Blockchain Use Case and a virtual panel discussion on Challenges in Enterprise Adoption of Blockchain
- Other Business topics' webinars included - *How To Build A Global Technology Company, Building & Scaling Deep Tech startups in UK*.
- A new series on *Robotic Process Automation* (RPA) is being curated with 3 webinars in pipeline having the first on 30th Jan.
- 6 workshops were organized in Gurgaon, Bangalore, Chennai, Kochi on topic like storytelling and value selling. 4 more workshops lined up to March 2020.

Building Micro communities and Connect Roundtables

NASSCOM Product Connect evangelize ecosystem and community to connect and network with product companies, enterprises, investors, academia and other ecosystem players. Conducting horizontal & vertical roundtables, organically creating a big product community in India through initiatives where voice & interest of each product individual could be heard & nurtured. We continued our efforts of organizing special roundtables to bring all stakeholders of the ecosystem on a common platform in multiple cities to exchanges ideas to be future ready. 23 Roundtables were conducted till the time of writing this report:

- 8 RTs across various cities in India on topics ranging from productizing services, cloud optimization, scalling, blockchain, AI, security to name a few

- 15 roundtables were witnessed during NPC 2019 on some of very crucial topics like, industry-academia collaboration, flip issue, movement from service to product, matter concerning incubators/ accelerators, investment ecosystem. 2 of them were specially designed for enterprise customers and their pain points besides other on vertical focussed products like Fintech, HealthTech, RetailTech, Bharat, among others.

- NPC created a community of over 100+ passionate product professionals who are driving national movement of creating a robust ecosystem for 8 verticals in an expansion of 8 summits conducted during NPC.

Policy Advocacy and Regulatory
- Various NASSCOM and council leaders are part of National Software Product Mission (NSPM) and all working committees set-up to implement National Policy on Software Products (NPSP).

- A roundtable organized under chairmanship of Sri Ravi Shankar Prasad Minister for IT, GoI on 23rd Aug with key product leaders and entrepreneurs. Discussions to support Research led Innovation, Branding of Indian Product 4 World, Ecosystem acceleration, Policy enablement, supporting Indigenous products in Govt./PSU procurement were key matters put forth in the said meeting. Industry in one voice welcomed minister's gesture to support s/w product industry.

- 2 roundtables on Samridh (Accelerator of Accelerators) program under NPSP organized one each with Accelerators and Entrepreneurs.

Diversity and Inclusion Forum

The 12th Edition of the NASSCOM Diversity and Inclusion 2 day summit "Diversity and Inclusion 3.0 : Inclusion for Global Impact" held in Bengaluru, October, 2019 witnessed highest participation so far and was received very well by the industry members. The summit was very well received by over 620 participants, 60 speakers from over 120 companies. The Summit held 7 keynotes, 8 workshops, 13 Panel Discussions, 10 Diversity and Inclusion showcase Stalls, NASSCOM Corporate Awards for Excellence in Diversity and Inclusion was given to 7 Firms, in 2 Main Categories and 3 Sub Categories. The Women Wizard Rule Tech (W^2RT) Users, Mentor and Guru felicitation and the highlight of the Summit was the Dance Performance by the Blind. NASSCOM members from across India came together to participate in the summit, 72% were GCC, 12% IT Services and 14% others. 50% from Bengaluru, 8% from Chennai, 8% from NCR,

and balance others. Persons with Disability and LGBTQI persons participated in a good strength of over 50 participants. NASSCOM Regional D&I Summit was conducted in Noida that received a great response. 350 participants participated in the summit.

NASSCOM Diversity and Inclusion also focused on 2 components for the year 2019

1. Gender Diversity – Women Wizard Rule Tech:
    a. The Women Wizard Rule Tech, is a key initiative under Gender Diversity. The Cohort 1 of this initiative was launched in November 2018, over 4000 users, 530 mentors and 35 gurus from an over 133 companies form the entire W^{2}RT Ecosystem. Over
    b. Over 104 (comprising of Tech Webinars, Gurukul, Role Model, and Lab Experience) sessions have been completed as on date and 133 sessions will be completed by 31st March 2020. Together, 3972 users have completed 20257 learning hours on the W^{2}RT program.
    c. Approximately 30% of the users will successfully complete their certification on the program
    d. The W^{2}RT Graduation Ceremony and Cohort 2 Launch is being held in 5 locations Hyderabad, Pune, Gurugram, Bengaluru and Chennai in the months of January and
2. Persons with Disability – NASSCOM in collaboration with NASSCOM Foundation has facilitated 3 sessions that focused on building awareness on the PWD Act in Organisations to increase the understanding of the PwD Act and the need for its adoption. NASSCOM Foundation also 3 PwD training centres that facilitates technical and soft skills training for them. Job Fairs for the disabled were organized in NCR and TN along with SSC
3. Launch of the Virtual Cell for identifying Skills gap for Defense Veterans and as an interface for the Tech Industry

10,000 Startups

The year 2019 for 10,000 Startups was a year of creating impact and building bridges of global opportunities for startups. The Indian startup ecosystem continued to keep its promise of being the engines of innovation registering increase in the number of unicorns, resurgence in investments, and rapid growth in advanced technology. As a growth enabler of the startup ecosystem, 10,000 Startups year long journey reflects the commitment of empowering startups by way of market access programs and intensifying engagement with the stakeholders from the industry. Here's a snapshot of the activities undertaken in the year.

PROGRAMS	NIPP	STARTUP HUB
777 Startups Impacted	**500+** Startups Impacted	**3200** Users onboarded
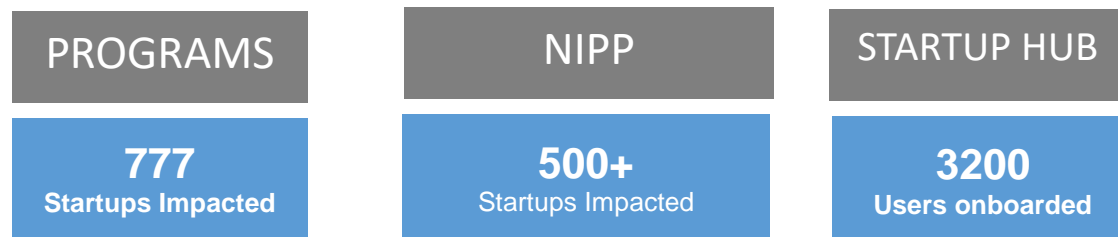
Funding & Acquisition

- Gurugram incubated startup Civil Cops raised an undisclosed amount of funding from Alfa Ventures
- Vizag based startup Geo Climate Risk Solutions secured investment and partnership opportunity with GAIL
- Drivershaab, a startup from Kolkata raised funding from IIM Calcutta Innovation Park
- Pet care tech startup, Floap raised the first round of funding from leading international and Indian angel investors
- Industrial IoT startup SwitchOn raised $1M from pi Ventures, Axilor Ventures, Others
- Jovian, Bangalore incubated startup raised $450,000 from Arka Venture Labs, Better Capital, Sense AI, Axilor Ventures and other individual angel investors from Silicon Valley
- Medikabazaar, NCR startup, raised Series B funding for 15.8 Mn USD, by the healthcare focused VC firm Health Quad, Belgium-based Ackermans & van Haaren (AvH)
- Reko Social (Navi Mumbai Warehouse), Data Sutram (Kolkata Warehouse), Dhiyo (Bangalore Warehouse) & Litifer (Gurugram Warehouse) received investments from 100X.VC
- Blowhorn, an intracity tech-logistics startup raised a fresh round of funding from multiple investors including Dream Incubator (Japanese VC)
- Code for the Next Billion program startup Public Vibe, a vernacular hyperlocal news platform, raised funding led by the Indian Angel Network
- Intello Labs, AgriTech startup from Gurugram that uses image analytics and AI to test the quality of commodities, raised $2 million from Nexus Venture Partners and Omnivore
- Bangalore Warehouse incubated startup Vivoiz Healthtech raised fresh funding of INR 55 Crore from China's BabyTree, a platform for parents to exchange information on childcare and shopping for children
- EasyGov, NCR startup, got its majority stake acquired by Reliance group as a step to expand its ecommerce venture to rural areas
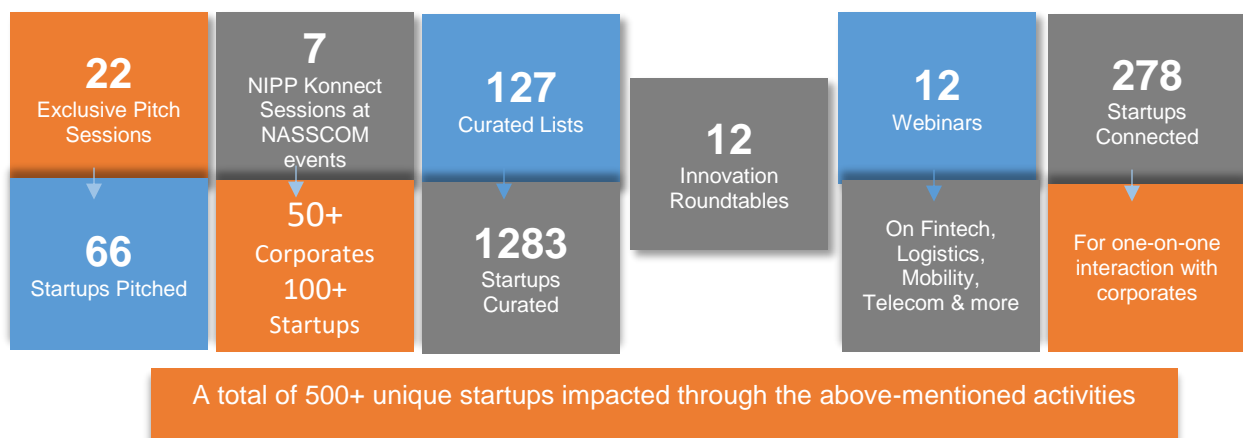
- Jiny Assistant, an InnoTrek and Bangalore warehouse incubated startup, raised funding for $720,000
- Kolkata warehouse program startup Vixplor secured funding of undisclosed amount.
- Mumbai Warehouse startup Commuteck raised undisclosed funds from multiple HNI investors
- Smartserv from Pune Warehouse raised a round of funding from ACCEL
- Mumbai Warehouse startup Print2Block received a work order worth Rs 15 lakh from the Government of Maharashtra.
- Kolkata warehouse program startup Ecoline & Imginor Labs raised seed fund for an undisclosed amount; OraStays raised series A funding for an undisclosed amount
- Virtual program startup, FindVise raised seed investment from Kredent InfoEdge

Partnerships & Recognition

- Noida warehouse startup Rightwatts got selected in Bangalore based Energy Accelerator program Shell E4
- Post the interaction with CK Birla Group, Rorodata, Hyderabad warehouse incubate, received POC from them.
- The Solar Labs won the coveted AI Innovation Challenge 2019 under the Smart City & Mobility category. As a special reward, they will also collaborate with the Govt. of Maharashtra to conduct a Proof Of Concept (POC)
- Wonk App entered into a collaboration with Common Services Centres, a GoI MeitY initiative, for onboarding 3.5 lakh centres across India to provide physical & online coaching through the app.
- Biogenick, a Kolkata based startup, signed a contract with GIBL

NASSCOM Industry Partnership Program (NIPP)

As the largest industry backed open innovation program, NIPP has been successfully promoting sustained engagement between large corporations and technology ventures in India. In its efforts to bring focus to emerging technologies and innovative solutions, NIPP has in the past year, planned structured discussions among enterprises as part of CXO roundtables, conducted exclusive pitch sessions, workshops, connect sessions and partner initiatives. Here's a summary of the activities undertaken:

22 Exclusive Pitch Sessions	7 NIPP Konnect Sessions at NASSCOM events	127 Curated Lists	12 Innovation Roundtables	12 Webinars	278 Startups Connected
66 Startups Pitched	50+ Corporates 100+ Startups	1283 Startups Curated		On Fintech, Logistics, Mobility, Telecom & more	For one-on-one interaction with corporates

A total of 500+ unique startups impacted through the above-mentioned activities
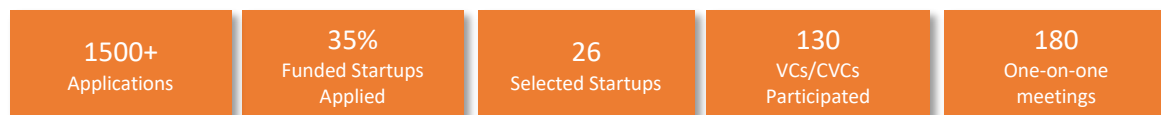
Japan VC Connect 2019

A first-of-its-kind initiative, in partnership between NASSCOM and the Embassy of India, Tokyo, saw around 26 tech startups from India present their ideas to more than 130 Japanese institutional investors in Tokyo. The delegation travelled to Japan for live pitch sessions which culminated over a two-day period and were followed by over 180 one-on-one meetings, where startups interacted with interested Japanese investors. The founders at the pitch session were looking to raise a sum of more than $2 million, going up to a maximum of $40 million. As an impact focused initiative, three startups successfully closed funding round with JVC participation.

Testimonial from investor partner

It was great to catch up with promising startups from India at the NASSCOM event in Indian embassy. I really appreciate NASSCOM 10,000 Startup's dedicated arrangement to bring over 25 startups to Tokyo. They also provided detailed information material of these startups to us, which was so helpful to understand each business in a few days' time. I sincerely hope that the event will be held every year in Japan. For sure, this event will be one of the best opportunities to connect Japan and India business collaboration.

Chiharu Goto, Japanese Venture Capitalist

Summary

1500+ Applications	35% Funded Startups Applied	26 Selected Startups	130 VCs/CVCs Participated	180 One-on-one meetings

India Fintech Day 2019

"Policy and Regulation as a driving force for Innovation in the BFSI Industry" formed the core of the fourth edition of India Fintech Day, held on 29th August in Mumbai. This day-long event brought together the top business leaders, government officials and topic experts from a range of financial institutions, industry bodies, multinational corporations and technology startups engaging in riveting panel discussions, enterprise connects, product showcases and round table discussions along with some high-powered business networking. The spirit of the event was summed up in the following quote:

"This is one place where no one talks about you or I, everyone talks the language of Us"
- Suniti Nanda, Fintech Officer, Government of Maharashtra

The first ever NASSCOM India Fintech Awards were introduced with the aim to recognise the most innovative solution in fintech across categories such as Regtech, Payments, Lending, Insurance, Wealth & Asset Management, and Financial Inclusion. Supported by NIPP, 19 leading BFSI startups were a part of the product showcase zone.

Summary

630 BFSI Attendees	**2** Fintech Reports Launched	**30** Speakers	**20 Startups** pitched to **25** Investors	**18 Startups** 16 Enterprises	**100 one-to-one** meetings in speed dating format
				NIPP Konnect Session	

MeitY-NASSCOM Startup Women Entrepreneur Awards 2019 (Software Products)

In one of the most coveted summits this year, NASSCOM partnered with MeitY to recognize women entrepreneurs who are set to inspire the next-gen of women to lead the Indian digital era. The MeitY-NASSCOM Startup Women Entrepreneur Awards 2019 (Software Products) garnered interest from women entrepreneurs across the country leading to a very competitive pool of over 250 applications, 510 nominations and 20-35 shortlists. The nominations were received across six categories – Startup of the Year (Healthcare), Startup of the Year (Technology), Emerging Startup of the Year, Startup of the Year (Agriculture), Innovative Startup of the Year, Best Social Impact Startup and Startup Leader of the Year.

Here's what some of the winners had to say about the initiative

"This recognition means a lot to me as it comes after years of struggling as an entrepreneur. This is my 4th fintech startup and so far the most successful one"
- **Mabel Chacko, Open Financial Technologies, Startup Leader of the Year**

"Such recognition shows the confidence of the ecosystem on women entrepreneurs, which was earlier a challenge."
- **Kalaiwani Chittaranjan, K Nomics Techno Solutions, Startup of the Year (Technology)**

NIPP Mobility Challenge

The **NIPP Mobility Challenge** was announced to build engagement between corporates and innovative technology ventures and connect emerging solutions with existing industry problems in the mobility space. The event also paved the way towards building a comprehensive forum for enterprises and start-ups to come together and explore new opportunities for ideation and collaboration. With an overwhelming response that saw **250+ submissions** pouring in, and equally the extensive support from

Summary

8 Themes	**250+** Applications	**34** Use cases	**9** winners	**25+** Mentors & Jurors	**1** NASSCOM Research Report collaboration

our partners, we knew that we were on the right track. The event spread across **3 months**, beginning April, concluded with the finale in Bangalore on **20th June 2019**.

NIPP Innovation Day has evolved into the annual **NIPP** Partners' meet. Held on 21st June, the event saw participation of **150+** corporate leaders, along with mentors, jurors and winners of the Mobility Challenge. The CXO roundtable and key note address by **Gaurav Hazra – Sr. Director & Head, India Markets, NASSCOM**, provided insights into **NASSCOM's** Open Innovation agenda.

Launch of NASSCOM Startup Hub
The Indian startup ecosystem is the third largest in the world. The most flourishing hubs within India continues to be Bangalore, NCR and Mumbai. In the hope of plugging into these evolved ecosystems, startups have moved and set up camps in these hubs. Tier II cities are not far behind when it comes to innovation and startups offering unique solutions. With the aim to bridge this divide, bring benefits of developed startup ecosystems to Tier-II cities and offer a platform for cross-collaboration and engagement with stakeholders of different regions, NASSCOM introduced its community engagement platform for startups – NASSCOM Startup Hub (NSH). It has brought together over 3200 tech startups, mentors and influencers to enable connect and discussions on a single platform. The future plans include onboarding corporates and investors and building India's super startup network on NSH.

Design4India

Design4India is an open platform that enables the design and technology ecosystem to come together and drive design adoption at scale. Launched by NASSCOM in 2016, Design4India focusses on building design capability and capacity into the IT workforce by catalysing the entire ecosystem of design practitioners, academia, industry and government from the ground up.

Design4India is focussed on nurturing innovation and accelerating the next phase of design disruption in India.

Design Summit
- NASSCOM Design4India hosted the 4nd edition of Design Awards on 22nd & 23rd August 2019 in Bangalore. The theme for the Design Summit was *"Embed 3.0: Unleashing the Power of Design Disruption".*
- The two-day confluence brought together *the most powerful global influencers in design and technology* who engaged in critical conversations that are reshaping the future of design.
- 20 global women design leaders / influencers presented on Scaling Design with Systems thinking, Designing and Delivering Brand Experiences, Design at the Cusp of Physical and Digital, Designing for Blockchain, etc.
- Impact:

Delegates: 850+, Workshops: 10, Speakers: 59, Sessions: 36, Women Disruptors: 20, Roundtables: 4, Design Couches: 15, Experience Zone: 11, Product Showcase: 8

Design Awards

- NASSCOM Design4India hosted the 2nd edition of Design Awards on 23rd August 2019 in Bangalore. With an aim to spur innovation in the fast-growing experience design sphere, Design Awards commends great design solutions that are impacting the industry.
- Application were accepted under the **5 platforms: Web, Mobile, Immersive, Connected & Intelligence and Digital Ergonomic Product**.
- The **25 Illustrious Jury and 25 Design Titans Jury** panellists comprised of global design and influencers handed out the Golden Spiral Trophy to the winners.
- Impact:
  Applications: 160+, Categories: 5, Finalists: 54, Awards: 25

Design Lounge | Meetups

- An interactive meetup with thought leaders in design on the theme **'Bringing Design to the frontline'** in Bangalore on 22nd April 2019 with over 110 participants.
- Collaborated with Amdocs and hosted an interactive networking session on **'Designing for The New Paradigm'** in Pune on 11th May 2019 with 100 participants
- An evening where though leaders in the design & technology ecosystem came together to talk about **'Do you have an appetite for design & innovation?'** in Delhi on 21st May 2019 with over 70 participants
- Partnered with Oracle India for an insightful evening with engaging sessions in Bangalore on 21st November 2019 with over 379 registrations
- **'India, By Design Report' & 'Design Awards Compendium'** Launch in Mumbai on 28th November 2019

Design Talk - Podcast/Webinar

- An online podcast/ webinar with Prateek Sinha, Partner & Experience Leader PwC India hosted by Gerard J Rego, Co-founder, Aggrigator Inc. with over 1,007 registrations held on 20th March 2019

Design Storm | Workshops

- One day workshop on *'Brand Archetypes'* involving marketing strategy held in Chennai on 26th April 2019 with 67 participants
- A hands on workshop on the *'Science & Art of Design Thinking'* held in Mumbai on 2nd May 2019 with over 90 participants
- In partnership with WDO at the Hyderabad design week we held a workshop on *'Design for Impact'* in Hyderabad on 9th Oct 2019 with 30 Participants
- *'Designing for Humans, not Users: Exploring an empirical model'* in Hyderabad as part of Hyderabad design week on 10th Oct 2019 with 30 participants
- We collaborated with Play Think Transform to host *'LEGO SERIOUS PLAY'* workshop in Delhi on 27th Nov 2019 with 11 participants
- A fun & interactive workshop in collaboration with Play Think Transform *'LEGO SERIOUS PLAY'* held in Bangalore on 3rd December 2019 with 3 participants
- We collaborated with IDC IIT Bombay to hold a 3 day workshop on *'Design Thinking'* held in Bangalore on 3rd to 5th Dec 2019 with 23 participants

Design4India Partner Events

- *Design Sprint Certification* workshop in Bangalore on 1st April 2019
- *Dilli Jam* a Global Service Jam in Delhi on 29th to 31st April 2019
- One Thing a *Dribble Meetup: Enabling Communities* in Delhi on 27th April
- One Thing an LinkedIn **Ask me Anything** session Online on 28th April 2019
- *UX Design Workshop* with Niyam Bhushan, Founder and Community Nurturer, DesignRev in Gurugram on 14th May 2019
- *Monsoonfish Design Technology* workshop in Pune on 7th June 2019
- *Design Thinking workshop* on Product Development in Calicut on 6th July 2019
- *NASSCOM Social Innovation Forum* in Bangalore on 15th June 2019
- *UX Design Workshop* with Niyam Bhushan, Founder and Community Nurturer, DesignRev in Gurugram on 20th June 2019
- Netbramha's *Storytelling through data visualisation* interactive session in Bangalore on 22nd June 2019
- *Design Thinking- Design 101 workshop* in Kochi on 13th July 2019
- Innovation Stratagem using *LEGO SERIOUS PLAY workshop* for Global Leaders in New Delhi on 18th and 19th July 2019
- *Kyoorius Design Yaatra*, Design conference in Goa on Sep 19-21st 2019
- *Hyderabad Design Week* set up a design Stall in Hyderabad on 11th to 12th October 2019
- *NASSCOM MarTech Summit 2019* in Mumbai on 27th & 28th Nov 2019

Sector Skill Council

Availability of digital talent will determine success and growth for the IT-ITeS industry in the digital era. Given this, talent development is one of NASSCOM's top 3 strategic goals. As NASSCOM, we are committed to Reskill and Upskill India's workforce to ensure TALENT is Future Ready in terms of New Age Skills and Jobs and to make India a global hub for Digital Talent. The talent agenda at NASSCOM is spearheaded by NASSCOM IT-ITeS Sector Skills Council (SSC NASSCOM).

This section is divided into two parts that delves into some of the key skilling & reskilling initiatives undertaken last year by FutureSkills & Skills at Scale verticals under SSC NASSCOM.

I.   NASSCOM FutureSkills

FutureSkills was launched as an industry-led response to quickly adapt to the changing job environment driven by technological shifts and changing stakeholder expectations. With NASSCOM as the enabler, FutureSkills portal that uses the technology of the future, was developed to create a space where a learner can access content on all the skills of the future. The portal enables a learner to seamlessly access free and paid content, assessments, virtual labs and get certified on the skills of their choice. It also has a curation feature that allows Subject Matter Experts from Industry and academia to contribute by curating content and learning pathways on these technologies.

Here's a preview of key landmark milestones achieved in the journey to build India's digital talent stack during the year 2019-20.

Year in Review:

• **FutureSkills LXP (Platform): The Story so Far**

FutureSkills Portal has grown into a community of 300,000+ committed learners spread across 100+ companies & colleges; and a marketplace with 30+ learning content partners providing micro and deep learning content that's enabling companies to leverage FutureSkills to drive their own talent transformation initiatives. Currently there are 50,000+ content pieces available on the portal. Around 6500+ of these have been curated by subject matter experts from the industry and academia.

This year has been all about high quality, industry relevant structured courses that have been made available on the portal for the learners. Here's a snapshot of the new content that's available for the learners on the portal:

- 10 Professional Skills: Technical skills are critical but building professional skills is equally important. Given this, content on 10 Professional Skills have been added to the portal (Problem Solving, Design Thinking, Continuous learning, Communication & Story-telling, Collaboration, Project Management, Product Management, Program Management, Digital Leadership, Negotiation & influencing). Some courses are being made available at no additional cost to the FutureSkills Subscribers.
- High Quality Primers: High quality Primers are now available on the portal for all 10 Technologies & 5 Professional Skills.
- Foundation Courses on AI & BDA: Foundation Courses created by partners aligned to NASSCOM recognized programs on AI & BDA are now exclusively available on FutureSkills. The portal has both Free & Paid certification courses on emerging technologies from half a

dozen of learning partners that are SSC NASSCOM validated and recommended by the Industry.

• Technical Competency Aligned Courses: Free and Paid courses mapped to job related technical competencies (NOS) for 5 popular job roles of AI/ BDA – Data Analyst, Business Intelligent Analyst, Visualization specialist, Applied Data Scientist, Data scientist have also been introduced on the portal this year.

• Expert Curated Content: SME curated learning content has been one of the key differentiators of the NASCOM FutureSkills platform. Content curated by Industry Experts that translates their tacit knowledge into explicit open source free content were made available on the portal this year. These content are aligned to the Foundation AI & BDA theory learning outcomes.

• SSC Certification & Assessments: Learners can take Offline SSC Certifications & Assessments for Foundation AI, Foundation BDA and other Job Related technical competencies for AI/ BDA (NOSs)

• **FutureSkills Research: Connecting the Dots**

With an objective to analyse and understand, the state of digital skills landscape in India and how industry hires STEM graduates, two research studies were commissioned.

• **NASSCOM FutureSkills Report 2019: Path to the digital future**
Through a series of in-depth questionnaire based interviews with select group of IT-ITeS companies, skill providers, and experts from academia in India, the report tries to capture insights on digital skills development; talent demand-supply gap and its root cause; learning in the digital age and collaborations within the ecosystem for digital skilling. The report is scheduled for release in February 2020.

• **IT Services Industry Hiring Trends Report**
The report captures insights into how the IT services industry hires from STEM colleges and what Academia can do to ensure that students are better equipped to get hired in IT services companies. The report also analysed hiring assessment result data of more than 100,000 candidates.

• **FutureSkills for Academia: Transforming University Ecosystem at Scale**

In 2018 FutureSkills forayed into the academic ecosystem through a pilot at a leading engineering college for 5000 students, thus opening up the platform for skilling fresh graduates on job oriented skills on emerging technologies. What started as a pilot to understand how FutureSkills initiative could be leveraged by colleges to complement their existing programmes, has gradually snowballed into signups from close to 20 colleges across India for 30000+ committed students. And the good news is, it's not just the colleges but the industry is also equally enthusiastic about adopting the platform in innovative ways to upskill students from colleges they hire from. Few companies have already launched joint projects with FutureSkills that leverages high quality structured courses available on NASSCOM FutureSkills for 10,000+ students from 30+ engineering colleges.

• **FutureSkills PRIME (Individual Learners): Building India's Digital Talent Stack**

The year ended on a high-note with the much awaited announcement from the Ministry of Electronics and Information Technology (MeitY), Government of India to work with NASSCOM to create India Digital

Talent Stack that will not just drive upskilling and reskilling at scale in India, but will propel India into a leadership position in the digital world. FutureSkills PRIME, an extension of the FutureSkills B2B platform to individual learners is scheduled for official launch by the end of 2020.

- **Technical Competency Development for Future Skills based Job Roles:**

Together with the Industry, SSC NASSCOM defined competencies (technical & behavioural) for emerging technologies, along with model curriculum. In the year 2018, competencies aligned to AI & BDA were approved by QRC and NSQC. In 2019, 45 competencies for Cloud Computing and 46 competencies for Internet of Things were approved by QRC and NSQC. The focus for 2020 will be to create similar competencies on Web & Mobile, Digital Marketing, RPA and Blockchain. Recognising the need to build a solid foundation for these new technologies, a comprehensive industry validated Foundation curriculum has been developed for AI, BDA, Cybersecurity, Cloud computing and IoT. Efforts are underway to encourage industry members to adopt the competency standards and to bring them into mainstream. Availability of courses aligned to these foundation model curriculum and NASSCOM SSC certifications for competency standards is a big step in this direction

- **Thought Leadership**: With an objective to bring in unique perspectives from key influencers and thought leaders to drive skilling agenda as a national priority, during the year, various roundtable discussions, workshops and other focussed events were organised. Listed below are some key events & happenings that helped us create some buzz:

  - **Blurring the Lines**: Intersecting Technology Adoption & Leadership Capabilities for GCCs | NASSCOM GCC Conclave, 26th April 219
  - **Cutting through the Hype of Tech Disruption:** Learning to Thrive in Changing Times | NASSCOM HR Summit, 17-18 July 2019
  - **Is it time to Shift Accountability for being Job Ready to Learners?** Can industry certifications drive this change? | NASSCOM BPM Summit, 5th September 2019
  - **Is your team ready to optimise Engineering Life-cycles in the age of IOT, Cloud, Big Data & AI?** | NASSCOM ER&D Summit, 26-27th September 2019
  - **NASSCOM FutureSkills Curate-a-thon on Cyber Security:** This was a first of its kind content curation challenge that was organised with an objective to leverage the FutureSkills platform's curation functionality, in collaboration with Data Security Council of India (DSCI). The Curate-a-thon on Cyber Security brought together leading cyber security experts from the industry and academia. One of the key outcome of this exercise was curation of high-quality, industry relevant content on Cyber Security. Top 10 pathways curated by the top 10 teams are live on the FutureSkills Portal.

Transforming India's Talent Story: A Roadmap to the Digital Future – A Conference for IIIT Directors: As part of NASSCOM's FutureSkills initiative, our endeavour is to bring-together the Industry, Academia and Government to drive conversation on the reskilling imperative and come up with a broad consensus on the way forward to drive a collaborative ecosystem to build the digital talent roadmap for India. Given this backdrop, an exclusive conference for a select group of 35+ IIIT Directors and key officials from the industry & government was organised.

II.   Skills at Scale: Year in Review

From capacity building programs that focuses on developing curriculum & competency standards, to faculty development to monitoring, evaluation & placements of trained candidates to adoption of Apprenticeship & RPL models as sustainable talent development strategies for businesses to re-skilling & upskilling on emerging technologies, there are a host of initiatives and programmes spearheaded by SSC NASSCOM aimed at helping the IT & ITeS Industry to develop their digital talent roadmap and navigate into the future.

Year 2019-20 has been a remarkable year for Skills at Scale and here's a quick snapshot of some exciting developments and key milestones achieved.

• The year started on a celebratory note with SSC NASSCOM being ranked at 2nd position (vis-à-vis 13th rank in 2017-18) among all Sector Skills Councils in the country for its outstanding performance in 2018-19 by the National Skills Development Corporation (NSDC). The team's performance in terms of Industry outreach activities to build a larger Industry led skilling ecosystem was specifically called out as a significant achievement by NSDC.

• **WorldSkills Project:** One of the key mandate for Skills at Scale is strategizing and preparing the India IT Skills Team representing the country at the biannual WorldSkills competitions. For WorldSkills Kazan 2019, together with industry partners and experts, four candidates were mentored & guided on Web Technology, Cloud Computing, Cyber Security & IT Software Solution for Business. It was a landmark moment, when all the IT Skills candidates who participated at the WorldSkills competition won laurels that included 1 Silver Medal and 2 Medallions for Excellence for the country, which was the highest medal tally put together by any other Sector Skills Council. In recognition of the contribution by SSC NASSCOM for the success of WorldSkills Kazan, Dr. Mahendra Nath Pandey, Union Minister of Skill Development and Entrepreneurship awarded Recognition of Excellence in Skilling to SSC NASSCOM on 9th November, 2019.

As a follow up to WorldSkills Kazan 2019, SSC NASSCOM hosted 2 international skills challenges to enable and prepare candidates representing India at WorldSkills Kazan 2019 on two future technologies – Cloud Computing & Cyber Security:

  • **International Cloud Computing Challenge, 1-7 July 2019, NOIDA:** Around 30 delegates representing Worldskills Global chapters from 9 countries namely, Brazil, Belgium, China, Ireland, Japan, Korea, Russia, Singapore and India participated in the challenge, where the best of minds showcased their skills on Cloud Computing. The challenge was flagged off in the august presence of Hon'bl Minister of Skill Development and Entrepreneurship (MSDE), Dr. Mahendra Nath Pandey along with the Joint Secretary, MSDE and CEO NSDC Mr. Manish Kumar and Industry representatives, and friends from the media fraternity.
  • **International Cyber Security Challenge, 26-28 July 2019, Chennai:** Participants from 5 countries and over 20 industry professionals took the challenge that provided them the much needed preparedness and exposure prior to WorldSkills Kazan 2019.

• **Apprenticeship:** Engaging apprentices is mandatory by law (Apprenticeship Act 1961) for all industry sectors, including IT-ITeS, in India. Last year the government introduced significant reforms in the Act, making it more flexible and industry friendly. As an outcome of SSC NASSCOM's proactive initiatives

aimed at creating awareness to facilitate NASSCOM member companies to implement apprenticeship and comply with the Government's framework, the following milestones were achieved:

- There was a 75% increase in the number of apprentice enrolments with on-boarding of 37,500+ apprentices across all schemes of Apprenticeship (MHRDs NATS and MSDEs NAPS OT+DT). Recent amendment to the Apprenticeship act now allows companies (if they choose to) to have up-to 15% of their headcount as apprentices. Currently, there are 4200+ organizations registered under NAPS DGT, optional trade and 49000 apprentices on MHRD NATS portals.

- SSC NASSCOM has been proactively working with top 75 IT-ITeS firms, predominantly NASSCOM member companies, spread across all verticals to integrate Apprenticeship programme within their businesses. Consequently, 14+ leading companies have picked up the baton.

  Further, with an objective to connect the available talent pool with the industry needs, SSC NASSCOM formulated a blueprint for connecting training institutes at ground level with companies at regional and national levels who need talent with specific skill sets.

- **Recognition of Prior Learning (RPL)**: RPL is the process of recognizing prior learning, often experiential, towards gaining a qualification. The program assesses and certifies those who have acquired their skills informally without certification. This not only recognizes their competency but also helps them access future job opportunities in the formal ecosystem. During the year, RPL certifications were enabled for 8000+ employees. This is over 100% increase from last year.

- **Assessments & Placements:**

The year 2019 was a stand-out year for SSC NASSCOM in terms of the number of youth certified or assessed under various Skilling initiatives. During the year 2.6 Lakh + candidates were assessed across various government schemes including PMKVY, NULM, DDU-GKY, Schools, CSR, 3rd Party Assessments, AICTE PMKVY-TI, etc. Under special projects of NPIU TEQIP 52,000 diagnostic assessments were conducted by the SSC Training & efficacy team for over 100+ institutes. This is a significant achievement as it translates into employment or placements of industry fit talent assessed.

Towards placing the assessed candidates, 71+ Rojgar Melas and recruitment drives for companies were organised. There was a substantial increase of 32% in our placement rate as 33K + candidates were selected by recruiting companies. Further the team ensured that all the Job Fairs enabled with SSC NASSCOM support were inclusive in nature. The team facilitated organization of 3 Exclusive Job Fairs for Specially Abled where over 10,000 jobseekers participated.

Another critical mandate for SSC NASSCOM is to devise and implement an evaluation criteria and methodology for IT Skills trainings conducted at scale. To conduct assessments of all such trainings that are at par with global standards, SSC NASSCOM tied up with 300+ Training Partners and Assessment agencies during the year.

- **Research & Capacity Building:**

  With an objective to develop and pilot a scientific approach towards demand aggregation with specific focus on the entry-level IT job roles, SSC NASSCOM completed a strategic review and rationalization of its Qualification Pack - Phase II (Demand Aggregation). Another project

commissioned was on 'Design, Development and Execution of a Framework for Evaluating & Ranking of IT-ITeS Training and Efficacy Ecosystem Stakeholders' to develop and adopt a "quality assurance" framework to ensure standardized quality in terms of training delivery, infrastructure and outcome.

As part of SSC NASSCOM's efforts towards increasing the effectiveness of the larger skilling ecosystem the team has been working with various stakeholders to obtain, improve, and develop knowledge resources to enable them to do their jobs competently. As part of this effort, 8 new sets of courseware were developed. Also, as part of the annual review process of rationalisation and alignment of Job Roles to industry requirements, 13 Job roles were retired after consultation with the industry.

During the year SSC NASSCOM has certified 800+ 'Trainers' and 'Master Trainers'. With an objective to evangelise acceptance and adoption of Apprenticeship in the industry, curriculum for 6 Job Roles was developed under Optional Trade Software Developer during the year. These went a long way in helping us to achieve our goals on Apprenticeship.

- **Thought Leadership:** SSC NASSCOM conducted 100+ events that brought together Academia, Industry and Government connects at various Regional Events, Hackathons, QP Adoption & Training of Trainer (TOT) sessions, MOU signing ceremonies, Press events, NASSCOM Conferences & International Events. Some noteworthy events conducted during the year include:

  - The team participated in the National Skills Conclave, Jaipur¬ where we interacted with the students and the skilling ecosystem stakeholder at all levels.
  - Get-EQIPed for The Future, Hyderabad: A higher education summit for premiere Institutions from the states of Kerala, Tamil Nadu, Karnataka, Maharashtra, Andhra Pradesh & Telangana was organized in partnership with MHRD. The purpose of the event was to discuss how Non-STEM students from these colleges can be equipped with current and future skills for enhancing their employability, through NASSCOM's FutureSkills initiative.

Membership Outreach

Tamil Nadu

NASSCOM Tamil Nadu Accomplishments in 2019

The year Jan 2019 to Dec 2019 was a notable year for NASSCOM Tamil Nadu region and its members, few of the key accomplishments includes :

- NASSCOM TN grew to a 430 plus robust Member base region.
- MSAT Survey results proved a greater level of satisfaction from the members of this region. Member Engagement of constant 75 % was achieved through significant activities like GCC, SME, Product, Marketing, Tech Series, GTD, HR Forum and some significant joint activities with other associations like CII, FICCI, TiE and IOD.
- Added 60+ Emerging IT Organisations in the region as new members, with prominent accounts like Comcast India Engineering Center(CIEC), Novac Technology Solutions and Client Network Services India Pvt Ltd
- Active engagements through face to face interaction meetings with prompt service and support resulted in an excellent retention, augmenting to the renewal membership of 90 % and a subscription collection of 95 %.
- Support from Regional Council, GCC & SME Chapter of TN created substantial value to the region.
- An overall of about 4500 plus delegates from our member and non-member cos. benefited from our activities of the year 2019.
- New Market opportunities and International Engagement programs such that, USA - SME Delegation, UK delegation and the GITEX Technology week participation with subsidy from TN Govt. had phenomenal participation from the region members. Remarkably to say, NASSCOM, UKTI & British High Commission partnered activity resulted in 3 of our member cos. kick starting their operation in the UK.
- Experience sharing session was a one of the unique program where member companies came forward, shared their Not So Common Challenges Faced during the course of running the business and how NASSCOM played an important role in addressing them. The session resulted in achieving some new members and retention.
- Share, Interact & Engage – CEO Get Together meet done at Coimbatore which was addressed by SME Council team led and was well attended by 40 Members. Likewise Design for India workshop on Brand Archetypes done by Ms. Nidhi Isaac, Design Director, Idiom Design and Consulting Ltd, GCC Meet done along with UiPath on Powering up Business Transformation through Automation & AI and IPR (Intellectual Property Rights) Awareness session along with MSME Development Institute, Key Govt. Schemes, Apprenticeship Awareness sessions were some of the finest sessions organized during this period.
- Year 2019 concluded with a magnanimous CEO Get Together meet, well attended by 130 CXO's plus from our Region Members. Enterprising Key note addressed by Mr. Nagaraj V Mylandla, Founder & Managing Director, FSS followed by the felicitation of past RC Members and the SME Council team were few highlights.

Kerala

Series of sessions that we did:

Event	Members Attended
Techseries	31

CEO Forum	8
SME Connect	8
HR Forum	2
Partnering Event	2
CEO Breakfast Meet	1
CEO Meet Up	1
Product Connect	1
CFO forum	1
Grand Total	55

Tech Series

- Monthly technology hangout for technology enthusiasts in emerging technologies.
- An average attendance of 50, Total participation of 1000+ techies

SME Scale up – Crossing the Chasm Series

- 5 sessions, touch based 50% of members, 85+ attendees

CEO Dinner Meet

- Anchored a new initiative; a talk session over cocktails dinner which was effective and appreciated by members because of the thought leadership.

Social Impact Interventions

- Worked with Dist. Collector Ernakulam during elections to bring in transportation facility for disabled with the support of member company.
- Helped in skilling differently abled ppl and there by placed 12 candidates in member companies.
- Helped Calicut members in a cost recovery issue faced by 50+ companies worth 58 lakhs.

Telangana & AP

NASSCOM Hyderabad team's vision is to build local tech ecosystem with focus on skills, innovation and to create new opportunities for business/market connect, enable a positive & collaborative ecosystem for the IT-BPM industry in Telangana and Andhra Pradesh that has over 300+ active members.

Below are some of the primary focus groups and active forums in the region, working closely to take the Members activities to the next level on promoting innovation to increase engagement at various levels in the region via technology, leadership & knowledge sharing series

• GCC Forum
• Product Working Group

- Engg, R & D Forum
- HR & D & I Forum
- Regional SME Forum
- Business Excellence Initiative

Region has conducted 27 activities for member engagement in this year so far, apart from the periodic forum and regional council meetings. In Hyderabad the 06th Edition of NASSCOM Product Conclave was conducted on 5th July 2019 with the broad theme of "Scale to Impact" and had over 500+ delegates from 203 unique organizations. This year NPC had 7 tracks - Cyber Security, AgriTech, Health Tech, BFSI, Retail, CASE (Engg) & Design Thinking, with 32 startups showcasing their products.

D&I summit this year was conducted on 27th June themed as "Transforming Workplaces" which had 4 sub themes - Women in Tech & Leadership, Disability Inclusion: Trends & Practices, Driving the LGBTQI+ Inclusion: Challenges & Practices, Inclusive culture & Sharing experiences. Summit had 350+ delegates from 72 unique organizations with 8 product showcases in the areas of social good.

As part of our social impact we have planted trees for all of our speakers, jury and sponsors with digital access to monitor with help of an NGO. We also procured jute bags from an NGO which supports women entrepreneurs from rural areas and given them as delegate kits in our events.

We have intended our engagement to fit our key focus areas for the year and worked towards executing the below initiative's in this year.

- Skilling- 100 hrs of reskilling program with 5 colleges
- Innovation- Problem statement identification and startup connect
- Market Access- Community content partnership with SME's and connecting them for the International enterprise connect programs

The other regional sessions and workshops also had a good participation from members across Enterprise, SMB and Startup organizations and received a positive feedback from most participants. This year we encouraged organizations to also collaborate with us in their CSR planning and managed to get organizations in building capability centres for people with disability and NDLM centres with the vision to empower at least one person per household with crucial digital literacy skills.

Karnataka

Karnataka has 500+ Members equally representing various industry segments in the state. Deriving from the mandate under Innovation, Skill/ Reskilling and Market. The year started with the focused approach on bringing the IT Capital of India to the Next New age Talent Destination.

Innovation

Since Innovations is Core element of our Business - Series of Technology sessions such as Digital Transformation, AI and Cloud Computing etc. well covered with 15 Tech sessions for GCC's, IT Services, BPM, SME and Product Vertical. The average impact Participation was at 60 touchpoints per session. The efforts to Impact with the tech series to continue so as to provide the clarity to the Industry on Strategies, Implementation and Case studies to drive Digital Transformation. 10,000 Start-ups is an initiative by NASSCOM to scale up the start-up ecosystem in India. The vision has been to foster entrepreneurship, strengthen early stage support for tech start-ups, co-create with enterprises and build global market access. Start-Up connect organized for major companies like Mashreq Bank, ARM, Akamai, ABB global, etc. to help on their Problem statements and enable Emerging organisation to build the connect.

Skilling

SSC (Sector Skill Council) NASSCOM is catalysing the IT-ITeS Skills development ecosystem and enabling India to be the global hub for Digital talent. SSC (Sector Skill Council) NASSCOM constantly works with the industry, academia and the Government to bridge the skill gap for the freshers. SSC NASSCOM has collaborated with the Karnataka Skill Development Society to launch the future skills job roles for Engineering colleges to make Engineering graduates more industry ready. FutureSkills, a part of SSC, is an industry driven learning ecosystem to get India accelerated on the journey to building skills and becoming the global hub for talent on emerging tech that focuses on building technology skills spanning 155+ skills for 70+ job roles in 10 emerging tech and 10 non-tech skills. We are collaborating with three major educational institutions, such as Gitam Universities, Sarada Vilas Educations and New Horizon Group of College over the Futureskills platform. To enable the employer and employee connect, SSC NASSCOM had organised a Job fair, where a total of 2000 Engineering students had participated, out of which 700 got shortlisted.

With the vision to upskill and to be future ready, we are collaborating with Wipro to upskill 10,000 students as a Talent Next Initiative. As per the recent Policy/Compliance, every organization needs to have 2% of their average headcount as apprentices. To make them aware and compliant about the same, we have organised multiple sessions for National Apprenticeship Promotional Scheme (NAPS) and Recognition of Prior Learning (RPL).

Trust

To build the Industry connect and the Trust we have formed Councils like, GCC, Regional and SME. Intent of these councils are to collaborate and take forward the National Charter at the state Level. There are few Initiatives which are going to Impact Internally to the respective Organisations and few of them will make the Impact to the external Ecosystem.

Just to name few initiatives:-

Water Conservation Initiatives – Impact to the External ecosystem

- Water Conservation Initiative is progressing well, 12 organization in principle agreed to pool in their CSR Funds. Planning to kick off in April- 2020 Workshop with the shortlisted NGO's planned on 30th Jan 2020.

Building Ecosystem – Impact to the Internal Organisation

- CHRO and CFO Forum formed with the agenda to understand and share the Best Practices and typical challenges faced / resolution.
- Within the GCC Community planning to form the focused group on BFSI , Retail, Healthcare
- Ideation of creating SIG among Semiconductor Companies and also among Pharma Companies

New Member Acquisitions The new acquisitions that took place all around the year 2019 enveloped new members from our various membership categories. The state was not only rich quantitatively, but also added some great brands to the list increasing the qualitative aspect. To name a few, logos like SanDisk India Device Design Centre Private Limited, Automation Anywhere Software Private Limited, Rakuten India Enterprise Private Limited and AIG Analytics Center were on-boarded alongside some very promising start-ups of Karnataka.

A New Member Induction Conference was organized in the month of August that witnessed a hearty gathering of 50 delegates coming in from more than 20 companies. In the beginning of the session, all the companies spoke about themselves and their area of work. They also shared their expectations from NASSCOM and their engagement plans for the coming year. The vertical heads of NASSCOMs' varied verticals, i.e. GTD, Product, ER&D, IT Services, Design4India, Research and Development, etc. along with all the members of the Regional Membership Team were present there to explain the new members about their respective verticals and its' initiatives. There was also an interactive Questions and Answers session that helped the members to get an even better understanding of NASSCOM. The Q&A session was followed by a High-Tea & Networking session which made the event even fruitful for the members as they got a great chance to interact and build connects with the NASSCOM Team as well as each other.

EAST

In line with NASSCOM imperatives, the main focus in the region was to create new market opportunities for our members by concentrating to different verticals in domestic market like Tourism & Hospitality, Retail Sector, Government departments (MSME, IT), Manufacturing, Media & Entertainment. We organized various discussion sessions to enhance Business Development engine for the member organizations. The second focus area was to work on strengthening the innovation quotient where various sensitization sessions and roundtables were organized related to evolving technologies, involving other industry sectors as well. Worked closely with Academia and State Government for skill development and to create new age workforce. We also supported Governments and other Industry Associations in cause of creating a vibrant Ecosystem.

Enterprise connect sessions and Market opportunities

- Business Connect with MSME Dept. - Govt of West Bengal - It was an interactive Business connect session with Government department supporting the MSME sector. The session was attended by Joint Director, Dept. of MSME, Govt. of West Bengal; Shri Snehasis Sarkar, COO, Biswa Bangla [Govt. of West Bengal Enterprise], Shri Amit Datta, MD, West Bengal Handicraft Development Corp. Ltd. [Manjusha], Chairman & MD, West Bengal State Export Promotion Society, Shri Rabindranatha Roy, MD, Tantuja. The leaders spoke about their need gaps of the MSME domains in terms of IT/Tech/Digital initiatives. Members represented their services and products in areas like Marketing, Logistics, Supply chain and Operations and shared their o expression of interest solve specific MSME problems and in the process of their business growth.

- CIO Connect Session with Shri Sanjay Prasad, Chief Information Officer, RP-SG CESC Power group-Mr. Prasad shared his experiences and also interact with the NASSCOM members about the ever changing market scenario. The Connect helped to understand the market need gaps from a CIO perspective.

- Retail Tech Connect- NASSCOM organized B2B connect between Retail Sector key leaders, CXOs and NASSCOM members and other IT Companies. The leaders discussed their initiatives on efficiently enhancing technology to reach out customers and their few need gaps.

- Tourism Tech Connect- The advent of technology is fostering a change in the travel and tourism industry with stakeholders adopting various technologies to improve operational efficiencies through Digitization, Chat bots, AI, Social Media tools, Mobile Apps, Virtual/Augmented Reality etc. Leveraging Tech & Digital can do wonders these days, in areas like Marketing, Logistics, Business Development, Supply chain and Operations. This was a brainstorming session on some of the business nuances of Tourism sector.

- Retail Summit with Retailers Association of India supported by NASSCOM- It was a gathering of Retail Community and IT-Tech Companies, 20+ members attended and contributed in the Connect. Kolkata Retail Summit created an immense opportunity for all the Retail Technology, Manufacturing, Real Estate, Distribution, E- Retailing, Retail Design, and in-store Marketing and Retail opportunity companies to find the right business partners/client to drive business growth.

- Sensitization Program by DIT (Department for International Trade) Partnership Network Support In UK – in Bhubaneswar -Successful completion of a mentoring session, organised by British High Commission to assist the startup's & entrepreneurs for starting and settling up their respective business at United Kingdom. The participants interacted with the officers of DIT, Department of Trade & Investment, earlier UKTI (Government Department under BRITISH HIGH COMMISSION at INDIA & working with businesses based in the United Kingdom) Had 30+ participations including members.

- Sensitization session related to VISA issues in USA , in Bhubaneswar – In this session the representatives from U.S. Commercial Service explained to NASSCOM members in Odisha the visa process and discussion were on the understanding the process better.

Marketing Masterclasses

- Roundtable on Growth Hacking Masterclass- The session broke down myths of Digital Marketing that is revolving in ecosystem. Showed the best digital practices to use and developing mind-set which are needed to get growth of business using digital initiatives. How to strengthen digital connectivity on channels and choosing right media to deliver about product/services. The case studies from the Speakers in Digital Transformation Journeys and related Growth hacks helped audience to relate and understand their regular issues.
- Workshop on Negotiation Skills- Negotiation Skills is one of the extreme important skills of self-assessment and applied in wide range of activities in Organizations decision making what are the barriers to successful persuasion strengthening communication skills, applying emotional intelligence in dealing with buyers on closing deal and also shared case studies relevant for both Product and Services.
- Workshop on "Brand Building"- The workshop helped to understand the importance of Branding and focused on how the brand building will help the mostly Non-IT community, to reach more clients or customers in both B2B and B2C business. Leveraging Technology, Digitization and digital marketing for business growth and presence.
- Workshop on Personal Branding- The decision to do business or not with another individual has been made long before the actual meeting has taken place. It holds true for hiring. Perception management deals with creating differentiation. A very well explained Brand Called I that is oneself. The desire, passion should not run away from any individual due to burden or not liking job. Rather this adds value to the results, the activities we do and brings different 'I" a Brand.

Sensitization Programs on New Technologies

- Discussion on "Artificial intelligence: Now & Future"- It focused on getting deeper into the best practices in the industry, overview of success of implementing positive change in business like digital transformation.
- Use of DevOps with its methods of Continuous Integration, Continuous Delivery, and Continuous Deployment CI/CD/CD.
- Cloud Adoption: Best Practices for SMEs- Discussions regarding opportunities, key adoption trends and future of Cloud and its best practices, pitfalls to avoid.
- Analytics & Data Science as part of IT Services & products for clients- Very importantly analysing helps to measure behaviour on choosing services or product helps owners to take decisions on statistical algorithms, avoiding over reliability.
- Best Practices on Secure Coding - The Session gave insight on Secure Coding practice for developing software in a way that guards against the accidental security vulnerabilities using best practices. Discussed on Threat and risk assessment on development projects, checking on internal process and technology, and understanding on some of the major bad and good programming concepts. Live demonstration on cyberattack and solutions showed.
- Discussions on Product Thinking Approach- The focussed discussion were on Developing Product Idea & Output, Solving basic needs define problems that helps in developing Product, Upgrading product after proper ER&D on buyer's interest, market research on new product idea, or on process before launching and lot more.

Initiatives on Innovation for the ecosystem in the Region

- Animation, VFX & Gaming Knowledge Workshop By Dept. of IT&E, Govt. of West Bengal, Supported by NASSCOM The workshop was influential in enhancing the audience's knowledge base pertaining to the scope of animation, VFX & gaming and identification of practical and scalable solutions. The knowledge workshop emphasized on proposed solutions, which will yield long-term benefits and help achieve sustainable development goals.
- Data Science Summit 2019 supported by NASSCOM- The summit provides a unique platform to bring together the industry and academia to deliberate and discuss on how data is driving the new economy, data driven transformations in organizations and the challenges faced, opportunities and the latest trends in AI, Deep learning, Data Science, Analytics, Machine Learning, IoT etc. This year there was dedicated sessions on Applications of Data Science and challenges: Data in the world of Media, Telecom, BFSI, Healthcare and Technology, Bridging Big data towards AI, IoT and other emerging technologies, and AI Standardization Work.
- Kolkata INFOCOM 2019 Supported by NASSCOM - is an initiative from the house of ABP and an event that sets the pace for development in the Information and Communication Technology (ICT) sector, bringing potential partners together and helping the industry connect with associates and customers. Our senior members were nominated in multiple sessions and panels. There were good business connects.
- Sharing Key Findings from NASSCOM Research by the Research Team, NASSCOM in Kolkata & Bhubaneswar- Shared great insights on trends changing the rules of Competition like Business models, Co-Creation agenda, Agility , customer choice & behavior. In addition, discussions were on overall knowledge on Digital capabilities, Enterprise Skills, IT Services & Cloud Platform. The session covered information on four pillars - Analytics, Cloud Platform, and Digital Enterprise & Skilling.

Initiatives supporting State Governments

- "Bengalathon" , a state wide Hackathon - Help to solve Government / citizen centric issues – partnering with Government of West Bengal involving Startups and Members
- Sensitization Program on Cyber Security Risks and Solutions for local IT-Entrepreneurs supported by Webel & Dept. of IT – Govt of WB in Siliguri leaders from STPI, IT Dept. W.B. Principal Secretary and NASSCOM Members delivered speech on new trends of Technology. New scope of work, resource management, trends of managing projects, training to apprentice – are vital to move in the flow of today's work culture.
- Jharkhand BPO-BPM Summit 2019 at Ranchi - Supported by NASSCOM- The aim of the summit was to promote BPO/BPM units in the state and provide a conducive ecosystem for BPO/BPM units.
- Sensitization Program for IT Entrepreneurs "Focusing on Future Technology" organized by Dept. of IT/ITeS W.B. supported by NASSCOM.

Skill development programs and creating equal opportunities

- HR Meet - Well-demonstrated complications in HR professionals discussed such as inadequacy of skilled workforce, employee migration to other influential organization also in other states. Presentation from SSC NASSCOM highlighted on various programs and initiatives like Apprenticeship, Recognition of Prior Learning (RPL), Demand Aggregation and Placements.

- Job Fair & Job Portal for the underprivileged an Initiative by Shantidham Foundation in Bhubaneswar – The initiative was supported by NASSCOM. The platform provided an opportunity for the underprivileged job aspirants all over India, to show their skills and be recruited. Also supported by SSEPD Department, Govt. of Odisha, MSJE, Govt. of India. NASSCOM Members participated in the recruitment process.

MP, Gujarat & Mumbai, Chattisgargh

- Western (Mumbai) Region conducted 43 sessions from Jan 2019 – Dec 2020. We conducted 21 Sessions in Mumbai, 16 sessions in Gujarat, and 6 sessions in Madhya Pradesh.
- We conducted our first Regional Summit – "MarTECH Summit 2019". NASSCOM's Mumbai regional team along with the Sales and Marketing SIG (an offshoot of the Mumbai RC) on 28th November conducted a high impact MarTech 2019 summit in Mumbai. The theme was "Beyond 2020: Marketing in the Age of Data, Intelligence, and Experience". Sneak-Peak: 255+ delegates | 16 focused Session | 3 Panel Discussion| 30+ Speakers | Pan India Participation. This event also generated revenue thru Sponsorship – INR 1730000/- and Delegate Fees – INR – 561500/
- 1642 Delegates from 1010 organizations participated thru this 43 session
- These sessions were covered up under 10 Forum initiatives like Tech Series, CEO Forums, D&I and HR, SME Forum, Product Forum, Sales & Marketing etc.
- SME Forum had a broader focus covering 22 sessions in Mumbai, Ahmedabad, Vadodara, and Indore

Key sessions and activities

Mumbai -

- Mumbai Regional Summit was the showstopper for the year. Near to 300 Delegates, 16 Focused Discussion, 30 + Speakers, was appreciated by one and all. This event itself generated a revenue near to 23 Lakhs.
- Focused more on Tech Series conducting sessions on new-age technologies like Banks of Future, Cloud, AI on Voice, etc...
- Tech session focusing for BPM Member on 'AI on Voice' was highly appreciated by all. We covered our research findings, followed by Keynote by Darshan Shankavaram, EVP and Global Digital CoE Leader, Capgemini. Kartik Poddar, SVP and Business Head, Haptik, shared the case studies, followed by Panel discussion.
- Working actively with Govt of Maharashtra (GoM) on initiatives like Skill, Policy inputs, Startups and helping SME scale up. The key highlight for the year was GoM supported the delegation to Dubai GITEX for NASSCOM SME members by helping them look at developing/exploring the UAE market. GoM partnered with NASSCOM for the India Fintech Day event in Mumbai.

Gujarat -

- Hon'ble Union Minister Shri Ravi Shankar Prasad inaugurated the NASSCOM CoE IIT Gandhinagar along with senior bureaucrats from MeitY and State as well. Considering the maturity of the product, relevancy to the Govt sector and our continuous interactions, NASSCOM recommended few Start-ups & our members as one of the selected innovators for a product demo and one to one interaction with the Minister. NASSCOM SME Council members participated at this interaction along with few select start-ups.

- NASSCOM conducted an SME Connect session on Key Government. This session was to brief about the Key Government schemes for SMEs both under the Central and State Governments schemes. There was also a focused discussion about the Export promotion schemes under Foreign Trade Policy for importers/exporters, Monetary incentives provided by Central Government to importers/exporters specifically covering MEIS/SEIS schemes, State Government incentives in brief, Other SME benefits from Central and State Government.

Madhya Pradesh –

- **NASSCOM had organized the Design Thinking Workshop for Executives on "Leadership in Design Thinking"** at Indore. This session focused on understand Design thinking methodology that can enable a customer-centric culture in organizations and how it encourages different ways of solving problems by framing the problem from a user perspective. This session's key highlight was to shows how to use empathy, ideation, prototyping, validation to generate ideas and gauge customer reactions and understanding of the service or product before huge resources are engaged in development.
- NASSCOM had organized SALES Workshop on "Scale@Speed: The Ultimate Sales Accelerator " at Indore. This session was to discuss powerful and easy to implement sutras for becoming a trusted advisor and creating predictable sales. The workshop's main objective was to How can we transform Sales owners to Consultants? The speakers had captured 5 SALES Sutras during his workshop. The engagement with the SALES Warriors (90+) was super fabulous. The way he had presented the SALES matrix was remarkable.

PUNE

CXO Forum
- CXO meet to discuss Tech in 20s
- GCC leaders RT on Legal, Compliance and Regulatory issues

Design Thinking
- Masterclass in Design Thinking –Speakers from Globant, Mastercard, Amdocs
- Industrial Product Design – Speakers from Whirlpool, MIT Design
- Design Lounge – Speaker from Renault

Sales, Marketing and Corporate Communication
- Corporate Communication - Building Brands with Communication – Speakers from Zensar, Persistent, Mastercard, Synechron, Bajaj Finserv, Icertis, Infocepts
- Session on Scale@Speed
- Expansion in emerging markets - Japan, France and Germanic region

Corporate Administration Forum - Reimagine Real Estate
- Speakers: Satish Magar, President, CREDAI, Leaders from GCCs and large organizations, Prominent commercial builders and JLL India

Deep Tech Sessions and Webinars
- Powering Next Gen Analytics, Microservices Masterclass , NLP in AI, Application Portfolio Modernization, Blockchain revolution, Voice technology , Software Testing , Adoption to Cloud, Big data, Industry 4.0

- Webinars: Building Virtual Assistant, Service Mesh, Compliance for emerging technologies, Case study on autonomous driving, Modernizing Legacy Applications, Whitepaper on Headless Commerce

Industry Academia Session
- 2 day campus program for academia members at Pune Infosys campus - 47 professors from 9 Engineering Colleges spread across tier 2 and 3 cities participated for Deep Tech Sessions, Startup Ecosystem Connect Program, Hackathon, Corporate Debate and visit to Innovation Lab

NASSCOM Tech Innovation Conclave
- NTIC 2020 is scheduled on 20th March 2020 would be one of the largest gathering of **Technology Evangelists, Impact Makers, Thought Leaders, Entrepreneurs and Influencers** as we are gearing up for **1200+ Delegates, 60+ Speakers, 35+ Session, 50+ Displays.**

NORTHERN REGION

The NASSCOM Northern Region has been at the forefront of offering Membership Value through a host of programs and sessions aimed towards deepening member engagement.

GCCs: NASSCOM in partnership with NTT Data & Uipath conducted multiple sessions on Intelligent Automation. 3 masterclasses were organized during the year attended by 250 professionals from 80 organizations. Attendees showed keen interest to learn how to graduate from traditional RPA to Intelligent Automation/Enterprise wide adoption.

The GCC leaders partook in council meetings and discussed a road map ahead for GCCs & how they can continue to be relevant.

BPM: Sessions on Chat emerging as digital customer experience, Roundtable on taking BPM ecosystem to the next level and Regional council meetings were held

Engineering R&D: Roundtable with ER&D leaders on Digital Transformation and Industry 4.0 was held.

Product: Focussed sessions for Product companies were organised such as- Building Products with a "Security First" Approach, and whatsapp for business and were very well received.

Technology: A number of Hands on workshops and Sessions were held under the Tech Series Banner such as Micro-Services and Deploying Methodologies, Computer Vision and Convolutional Neural Networks and many more were held

HR: Under the HR Banner Sessions on talent and rewards trends was conducted in the region, CHRO Sessions, Best Practice Sharing, Employee Fraud , Session on POSH were among the notables

Leadership: Curated Leadership sessions such as – Inner Mind of a CEO, Importance of Coaching, open source Leadership helped in bringing the CEOs together for a discussion on topics that matter to the leadership

Sales & Marketing: Consultative Selling, Application of Design thinking in Sales & Marketing, Business Storytelling sessions were held

Design : Sessions such as Design thinking as a Strategic Business Tool and Cultivation Design Culture in an organisation were held in the region and received an excellent response.

Global Trade : The Northern Region Members participated in delegations to USA, Dubai and other countries

Large Format Events:

NATC: The 6th edition of the NASSCOM Annual Technology Conference 2019 was hosted at The Leela Ambience, Gurugram. Under the "Industrialization of Disruptive Technologies", the conference brought together over 1200 delegates from all across India. The conference featured 7 deep dives, 12 Parallel sessions and 6 keynotes addressed by 45 Speakers. The idea being to unfold what it takes to move innovative solutions from Labs to Production. The Conference comprised of Two full days of learning and networking opportunities to connect tech leaders & developer community and brought them up to date with the latest advancements in disruptive technologies.

The NATC also featured a tech Awards for the first time in which over 100 entries were received ranging from Startups to Multinationals. An independent jury selected the final winners who were facilitated in an award ceremony at the conference.

NASSCOM-CBRE Disruptech : NASSCOM along with CBRE organised a completion for companies who could design innovative solutions in Reality. The unique completion invited multiple application entries from Proptech Startups

The participants underwent a rigorous evaluation process and top 3 participants received Paid POC with CBRE and access to investors. This programme received a lot of traction in the reality tech space and was seen as a niche completion.

NASSCOM Globallogic Power of AI Hackathon: 27 teams with over a 100 participants from 20 unique companies from all over India competed at the National level for this Hackathon. The teams were evaluated on the basis of Design, Innovation, Business Implication, Solution Approach, Working Demo and Presentation. There were 2 jury rounds consisting 8 Jury Members which evaluated 25 teams in attendance. The Jury evaluated the teams through 7 long hours after intensive deliberations the final winners chosen. The Hack closed on a high note with the distribution of the prize cheques and participation certificates to the teams

Out of the Box Sessions:
   - Fintech Enterprise connect
   - Session on Japanese Language and Culture
   - Customer Journey Mapping

Lucknow: Sessions on Sales and Marketing Session, Apprenticeship Law and awareness session on Sector Skills Council were held.

Chandigarh : Members Meet ,Meet , CXO Breakfast meeting : Design Thinking Workshop, Apprenticeship Law/mandate and how to go about it, Global Trade sessions Workshop on "Business Storytelling and NASSCOM day was organised for the members.

Jaipur: CEO Sessions, Webinars on PF, Tech Sessions and HR Sessions, Session on block chain were conducted for members