

NASSCOM Emerge-Product Forum

THE GROUP OF



# EMERGENTS



**Rising Stars**  
of Indian IT Industry

Process Partner  
**zinnov**  
Management Consulting

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# Message

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

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

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

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

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

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

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

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

**Som Mittal**  
President, NASSCOM

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

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



# **Emerge "League of 10"**

## iKen Solutions

on intelligent data analysis for a delightful user experience



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

### Data that Delivers Intelligence for Custom Targeting

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

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

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

### Unmatched Customer Delight

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

### Solutions with a Pedigree

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

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

#### Organisation

iKen Solutions

#### Play space

Intelligent analytics for telecom, media and technology companies

#### It all started in

2008

#### At the helm

Siddharth Goel, Prof. Rajendra Sonar

#### Winning gameplay

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

#### High point

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

# Mining for Gold



## Vizury Interactive

on aiming for number one position in non-traditional markets



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

### The Play

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

Take for instance what Vizury is doing for Virgin Australia. The website receives around 200,000 unique visitors each day, each exhibiting different needs and behaviour. Vizury's platform consolidates this data/behaviour and uses it to target

them with personalised ads when the visitor moves on to other websites.

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

### The Road Less Travelled

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

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

#### Organisation

Vizury Interactive

#### Play space

Digital CRM

#### It all started in

2008

#### At the helm

Chetan Kulkarni, Gourav Chindlur and Vikram Nayak

#### Winning gameplay

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

#### High point

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

# One Country, Many Voices



## Reverie Language Technologies

attempts at bridging the digital language divide



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

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

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

### Three-Pronged Attack

Reverie has worked extensively to resolve the key issues constraining

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

### The Horizontal Play

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

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

### The Passionate Trio

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

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

#### Organisation

Reverie Language Technologies

#### Play space

Multilingual platforms for mobile devices

#### It all started in

2009

#### At the helm

Arvind Pani, Vivekananda Pani and S K Mohanty

#### Winning gameplay

Making digital content available for regional language speakers

#### High point

Winning the Qualcomm ‘Q’ Prize for innovation in 2011

# Marrying Creativity with Technology



## Knolskape

on building India's largest simulation training programs



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

"Doctors have cadavers and pilots have flight simulators. In the same way, managers need to have a simulated learning environment. One cannot become a good manager by passively watching powerpoint slides. We help the user experience a virtual storyline and make decisions in a safe

environment - it is like bringing case studies to life where the learner is the protagonist," says Jayaraman.

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

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

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

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

### Organisation

Knolskape

### Play space

Business simulation

### It all started in

2008

### At the helm

Rajiv Jayaraman

### Winning gameplay

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

### High point

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

# Innovation Powered Growth



## mCarbon Tech Innovation

on value creation for clients



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

### Enhancing Customer Loyalty

mCarbon was recently recognised by Airtel as its innovation partner for this service. The flagship platform Greenroom is a network app store that enables the big telecom operators launch

network marketing services such as call-management, which blocks unwanted calls on mobiles. Another mCarbon solution is the Airtel 'Gifting Service' for prepaid mobile customers that allows friends on the Airtel network to send and receive talk-time to each other - and even give away mobile services' gift packs with or without a special occasion. Another popular service is the SMS SOS app that allows customers to send an emergency 'call me back' SMS alert to a friend, even when prepaid balance is negative.

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

### The Journey

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

### Moving Overseas

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

#### Organisation

mCarbon Tech Innovation

#### Play space

Mobile VAS

#### It all started in

2007

#### At the helm

Rajesh Razdan and Brij Mohan Mahendru

#### Winning gameplay

Building a network app store that helps telcos tap VAS revenues

#### High point

Acquiring telecom behemoth Airtel as a marquee customer





# Accelerating the Product Puzzle



## Techcello

on building product vs services organisations, now and then!



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

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

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

### Early Years

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

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

### Moving up the Product Stack

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

#### Organisation

Techcello

#### Play space

Engineering stack for software product organisations

#### It all started in

2010

#### At the helm

Shankar Krishnamoorthy, Gowri Shankar Subramanian and Bhoo Thirumalai

#### Winning gameplay

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

#### High point

Building a global business, based out of India

# Riding the Gaming Wave



## Rolocule Games

on chasing dreams



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

### Chasing a Dream

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

### Turning the Corner

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

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

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

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

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

#### Organisation

Rolocule Games

#### Play space

Game development for mobile devices

#### It all started in

2009

#### At the helm

Rohit Gupta

#### Winning gameplay

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

#### High point

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

# Making the Customer Connection Happen



## Knowlarity Communications on biting into cloud telephony in India



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

### Making the Right Call

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

A key USP of the platform is the level of detail captured on every

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

### Scaling the Solution

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

### Making the Grade

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

#### Organisation

Knowlarity Communications

#### Play space

Cloud Telephony

#### It all started in

2009

#### At the helm

Ambarish Gupta and Pallav Pandey

#### Winning gameplay

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

#### High point

Pioneering the cloud telephony space in India

## Foradian Technologies

on building a thriving marketplace for their product



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

### Innovating on Opensource

Initially, while trying to sell Fedena to different schools, the team realised that deployment for each school required heavy customisation, which made the model difficult to scale. They soon hit upon the idea of developing the school management platform as opensource software. In the crowded school management solutions market what makes Fedena stand out is the open

source business model, where the basic solution is available at no cost while Foradian only charges for additional plug-ins. Other organisations are also free to innovate and develop their plug-ins on Fedena. This has helped create a thriving ecosystem and marketplace for Fedena.

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

### Spreading their Wings

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

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

#### Organisation

Foradian Technologies Pvt. Ltd.

#### Play space

School management software

#### It all started in

2008

#### At the helm

Unni Korothe, Abdul Salam, Arvind GS, Abdulla Hisham, Deepesh Melath, Vishwajith, Praveen Prabhu and Arun Raveendran

#### Winning gameplay

Leveraging the open source model to create a highly accessible product

#### High point

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

# A Quiet Revolution in the Hills



## B2R Technologies Pvt. Ltd.

on giving back to the community while remaining profitable



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

B2R also wanted to differentiate itself from the scores of other BPMs being set up in rural areas by not plucking low hanging fruit of low-value data-entry work, but instead deliberately creating capabilities

to work in niche areas where quality was vital. The organisation has been focusing on legal process outsourcing (LPO) and publishing sectors that have generated key clients.

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

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

### Organisation

B2R Technologies Pvt. Ltd.

### Play space

Rural BPM

### It all started in

2009

### At the helm

Dhiraj Dolwani, Venki Iyer

### Winning gameplay

Building a rural BPM that focuses on high end niche work

### High point

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



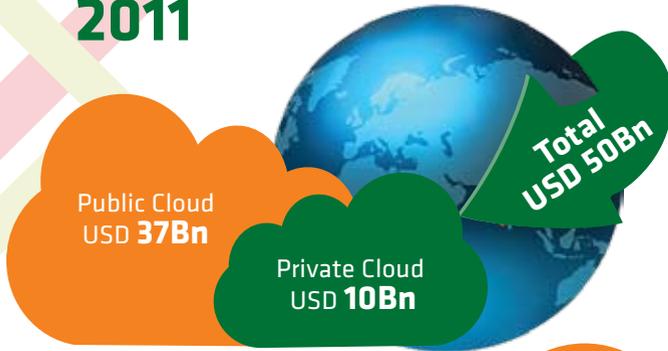
# **Opportunities in Emerging Technologies**

# CLOUD COMPUTING

A GROWING OPPORTUNITY ACROSS THE WORLD

## Worldwide Cloud Market

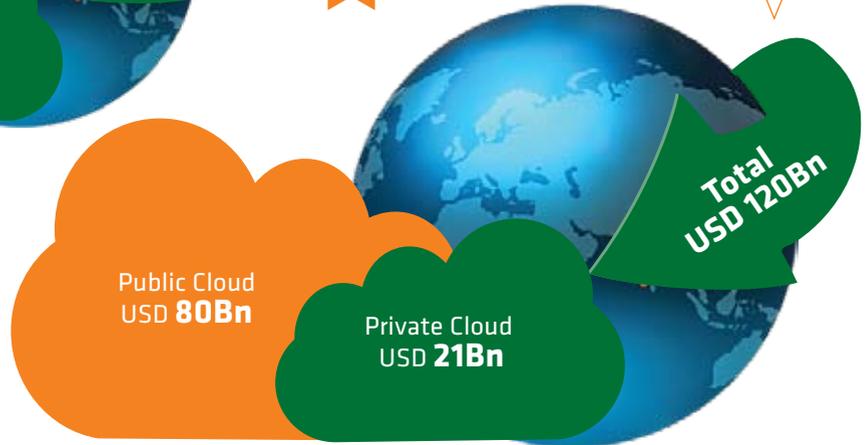
2011



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

25%

2015



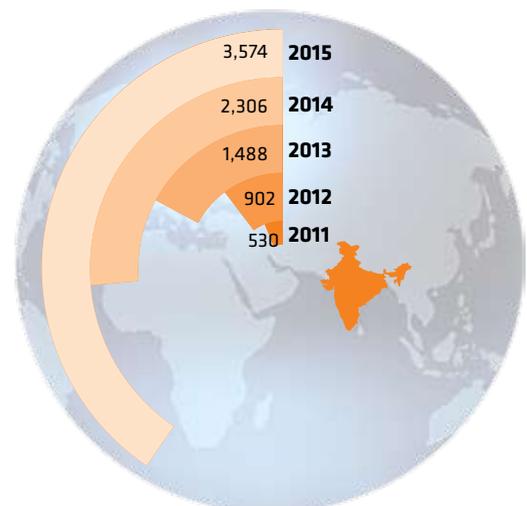
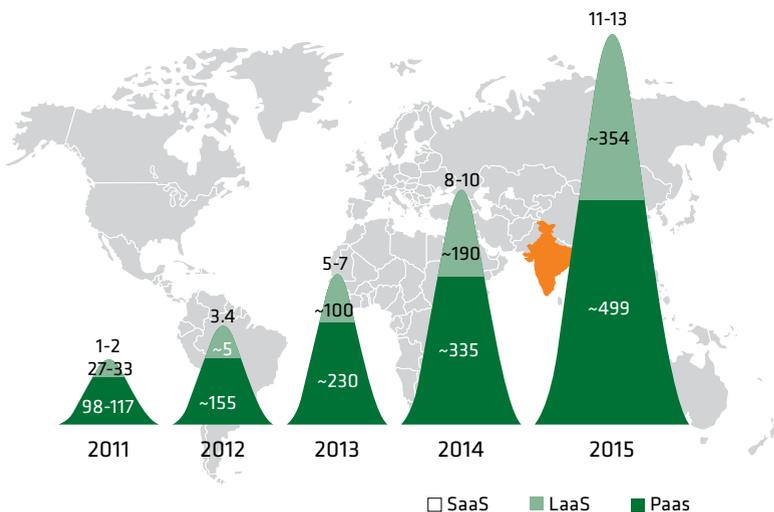
SaaS and IaaS contribute larger share whereas PaaS would witness higher growth rate as the ecosystem mature

Public Cloud Private Cloud

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

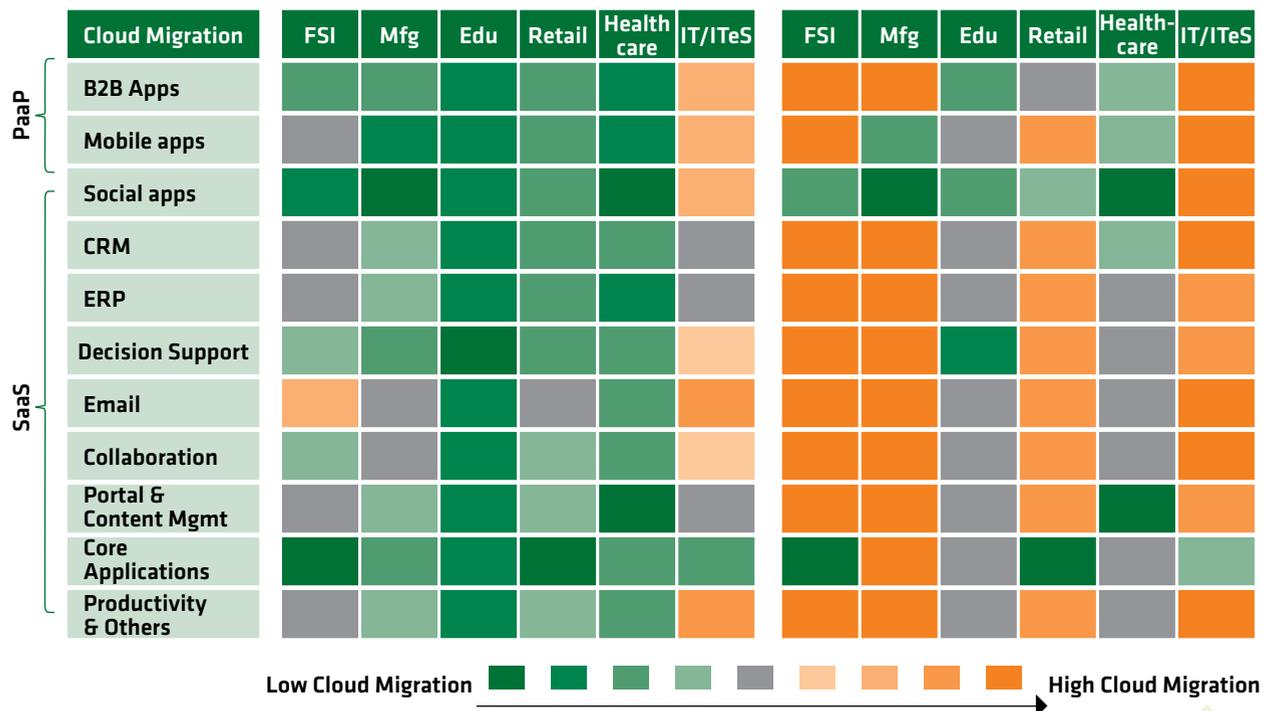
### Public Cloud Market in India\*, (USD Mn)

### Private Cloud Market in India, (USD Mn)



Source: IDC, Primary interactions with key stakeholders in the cloud ecosystem; Zinnov analysis  
 Note: \*Linear projections based on historic growth observations

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



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

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

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

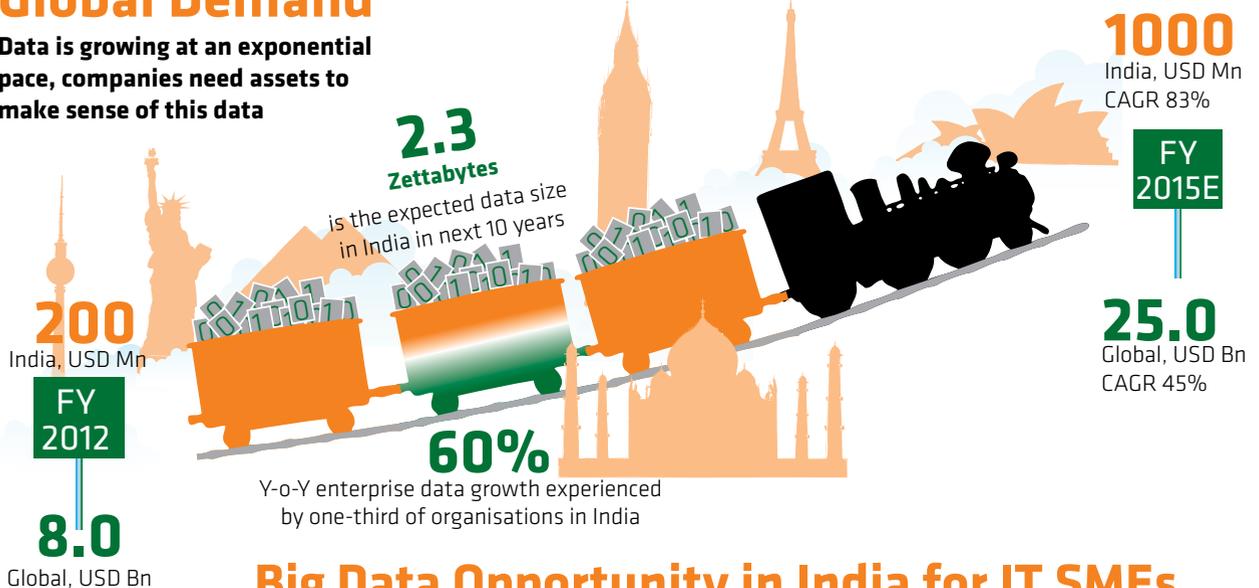
# Analytics – A Big Opportunity!

## Global & India Big Data Market Size



## Global Demand

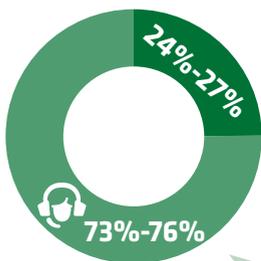
Data is growing at an exponential pace, companies need assets to make sense of this data



## Big Data Opportunity in India for IT SMEs

### India

100% = ~USD 1.1 billion



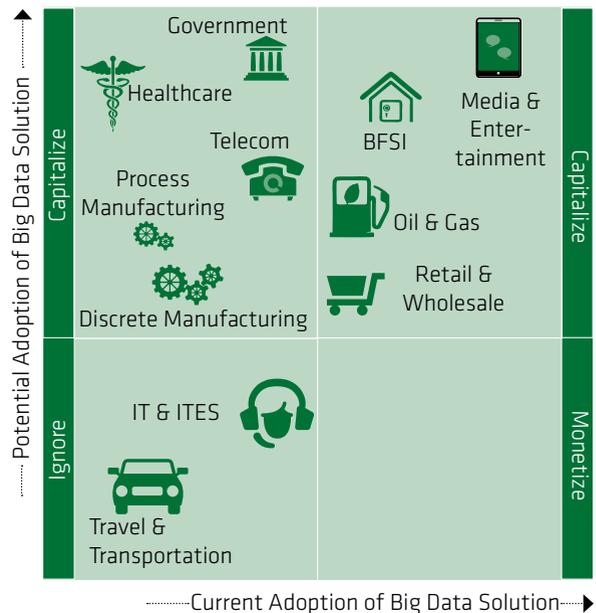
**From outsourcing perspective, Indian IT SMEs have two opportunities:**

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

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

- Pure-play Analytics firms
- Integrated IT/BPO players

Source: CRISIL GR&A analysis



# Enterprise Mobility (EM) – growing potential across the world



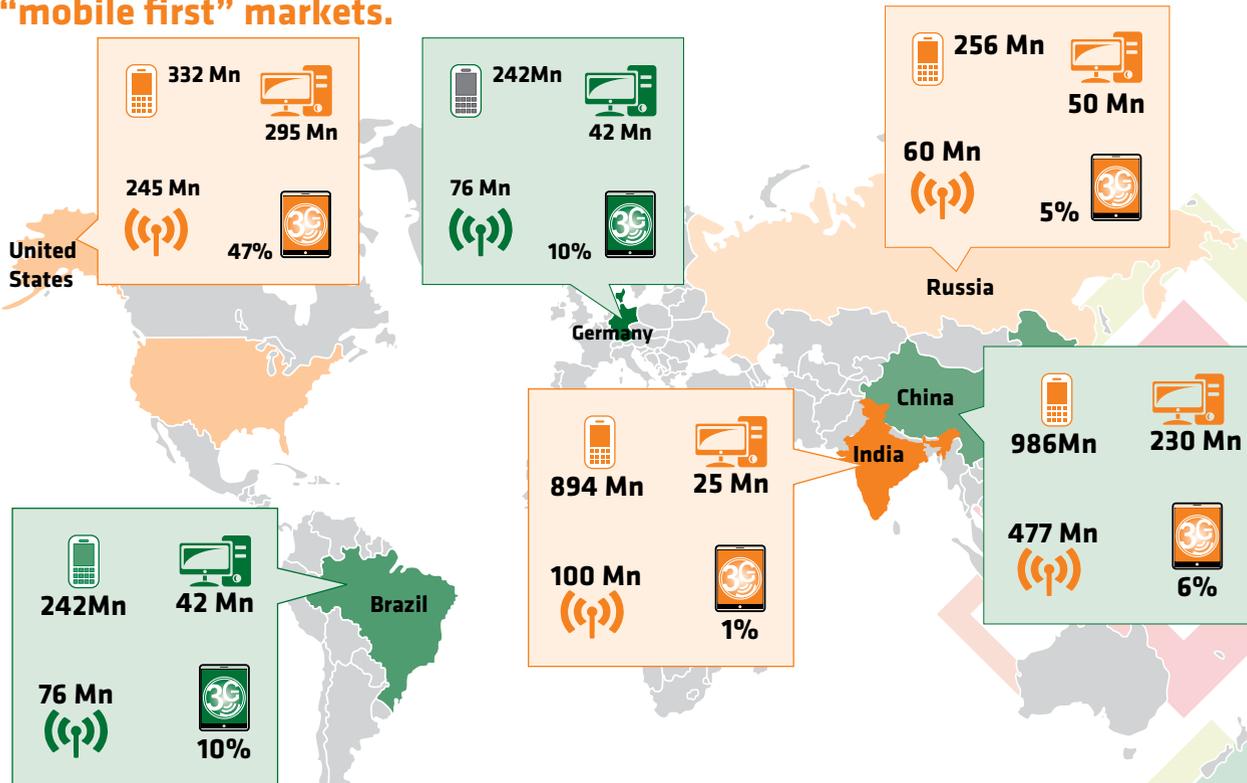
7.7%



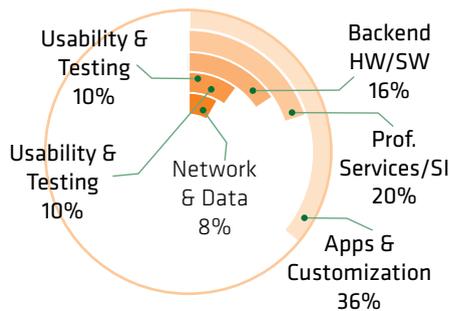
Worldwide Enterprise Mobility Market (Including Open Operating System Segment, End-user Devices Segment)

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

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



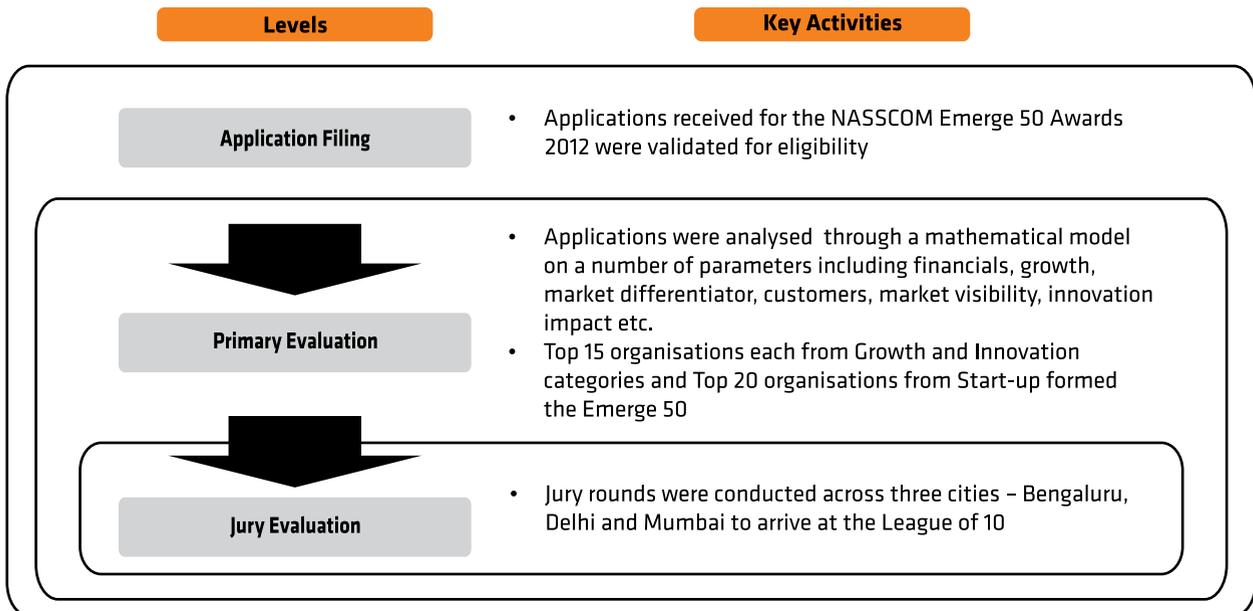
## Enterprise Mobility Market Split by Service Lines in India



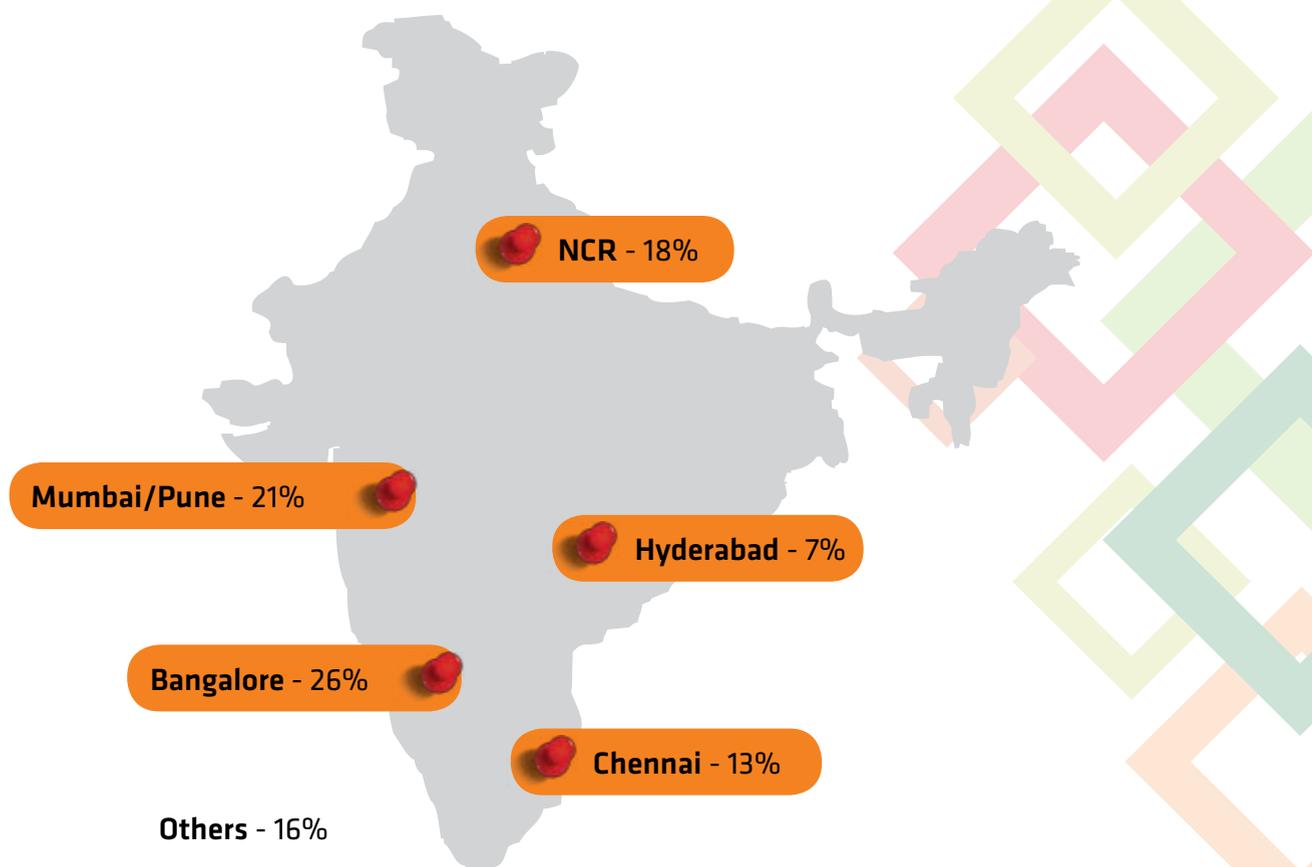


# **Selection Framework and Jury**

# Selection Framework



## Location Wise Split of All Applications



NCR includes: Delhi, Gurgaon and NOIDA

# Jury Members



**Anil Bakht**  
Eastern Software  
Systems



**Pramod Bhasin**  
Genpact



**Arjun Malhotra**  
Headstrong



**Mohit Goyal**  
Indian Angel  
Network



**Krishna Kumar  
Natarajan**  
Mindtree



**Anal Jain**  
Industry Veteran,  
Former MD at  
MicroVentures



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



**Samir Kumar**  
Inventus India  
Advisors



**Sameer Brij Verma**  
Nexus Venture  
Partners



**GBS Bindra**  
Logica



**Manav Garg**  
Eka Software  
Solutions



**Mukund Mohan**  
Microsoft Startup  
Accelerator



**Uresh Vahalia**  
EMC Corp



**Anil Joshi**  
Mumbai Angels



**Prakash Rane**  
ABM  
Knowledgeware Ltd.



**Ashank Desai**  
Mastek



**Ninad Karpe**  
Aptech Ltd.



**NASSCOM Emerge  
50 Winners for 2012**

# Emerge 50: Start-Ups

## START-UP CATEGORY

## EMERGE 50 WINNERS

**Organisation Name** | Array Shield Technologies Pvt. Ltd.

**Headquarter** | Chennai

**Year of Inception** | 2010

**Organisation Website** | [www.arrayshield.com](http://www.arrayshield.com)

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

**Organisation Name** | Attinad Software

**Headquarter** | Trivandrum

**Year of Inception** | 2010

**Organisation Website** | [www.attinadsoftware.com](http://www.attinadsoftware.com)

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

**Organisation Name** | B2R Technologies Pvt. Ltd.

**Headquarter** | New Delhi

**Year of Inception** | 2009

**Organisation Website** | [www.b2r.in](http://www.b2r.in)

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

**Organisation Name** | CipherGraph Networks

**Headquarter** | Bengaluru

**Year of Inception** | 2011

**Organisation Website** | [www.ciphergraph.com](http://www.ciphergraph.com)

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

**Organisation Name** | Codelearn.org

**Headquarter** | Bengaluru

**Year of Inception** | 2012

**Organisation Website** | [www.codelearn.org](http://www.codelearn.org)

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

**Organisation Name** | Gramener Technology Solutions Pvt. Ltd.

**Headquarter** | Hyderabad

**Year of Inception** | 2010

**Organisation Website** | [www.gramener.com](http://www.gramener.com)

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

**Organisation Name** | Knolskape Solutions Pvt. Ltd.

**Headquarter** | Mumbai

**Year of Inception** | 2009

**Organisation Website** | [www.knolskape.com](http://www.knolskape.com)

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

**Organisation Name** | Metamagics Computing Pvt. Ltd.

**Headquarter** | Pune

**Year of Inception** | 2008

**Organisation Website** | [www.metamagics.com](http://www.metamagics.com)

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

**Organisation Name**| Mettl.com

**Headquarter**| Gurgaon

**Year of Inception**| 2009

**Organisation Website**| www.mettl.com

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

**Organisation Name**| PromptCloud

**Headquarter**| Bengaluru

**Year of Inception**| 2009

**Organisation Website**| www.promptcloud.com

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

**Organisation Name**| MilkorWater

**Headquarter**| Hyderabad

**Year of Inception**| 2011

**Organisation Website**| www.milkorwater.com

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

**Organisation Name**| Reverie Language Technologies Pvt. Ltd.

**Headquarter**| Bengaluru

**Year of Inception**| 2009

**Organisation Website**| www.reverie.co.in

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

**Organisation Name**| Muhive Technologies Pvt. Ltd.

**Headquarter**| Bengaluru

**Year of Inception**| 2012

**Organisation Website**| www.muhive.com

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

**Organisation Name**| Rolocule Games Pvt. Ltd.

**Headquarter**| Pune

**Year of Inception**| 2010

**Organisation Website**| www.rolocule.com

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

**Organisation Name**| Mymo Wireless Technologies Pvt. Ltd.

**Headquarter**| Bengaluru

**Year of Inception**| 2009

**Organisation Website**| www.mymowireless.com

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

**Organisation Name**| Simplibuy Technologies Pvt. Ltd.

**Headquarter**| Pune

**Year of Inception**| 2010

**Organisation Website**| www.wic.co.in

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

**Organisation Name** | Sukrut Systems

**Headquarter** | Pune

**Year of Inception** | 2010

**Organisation Website** | [www.sukrutsystems.com](http://www.sukrutsystems.com)

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

**Organisation Name** | TapToLearn Software

**Headquarter** | Pune

**Year of Inception** | 2010

**Organisation Website** | [www.taptolearn.com](http://www.taptolearn.com)

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

**Organisation Name** | Trutech Webs Pvt. Ltd.

**Headquarter** | Mumbai

**Year of Inception** | 2009

**Organisation Website** | [www.trutechwebs.com](http://www.trutechwebs.com)

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

# Emerge 50: Innovation

**Organisation Name** | CustomerXPs Software Pvt. Ltd.

**Headquarter** | Bengaluru

**Year of Inception** | 2006

**Organisation Website** | [www.customerxps.com](http://www.customerxps.com)

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

**Organisation Name** | Foradian Technologies Pvt. Ltd.

**Headquarter** | Bengaluru

**Year of Inception** | 2009

**Organisation Website** | [www.foradian.com](http://www.foradian.com)

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

**Organisation Name** | Heckyl Technologies Pvt. Ltd.

**Headquarter** | Mumbai

**Year of Inception** | 2010

**Organisation Website** | [www.heckyl.com](http://www.heckyl.com)

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

**Organisation Name** | iKen Solutions Pvt. Ltd.

**Headquarter** | Navi Mumbai

**Year of Inception** | 2008

**Organisation Website** | [www.ikensolutions.com](http://www.ikensolutions.com)

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

**Organisation Name** | Knowlarity Communications

**Headquarter** | Gurgaon

**Year of Inception** | 2009

**Organisation Website** | [www.knowlarity.com](http://www.knowlarity.com)

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

**Organisation Name** | Kreeo

**Headquarter** | Bengaluru

**Year of Inception** | 2007

**Organisation Website** | [www.kreeo.com](http://www.kreeo.com)

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

**Organisation Name** | Langoor Digital Pvt. Ltd.

**Headquarter** | Bengaluru

**Year of Inception** | 2010

**Organisation Website** | [www.langoor.com](http://www.langoor.com)

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

**Organisation Name** | Lexplosion Solutions Pvt. Ltd.

**Headquarter** | Kolkata

**Year of Inception** | 2007

**Organisation Website** | [www.lexplosion.in](http://www.lexplosion.in)

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

**Organisation Name** | MercuryMinds Technologies Pvt. Ltd.

**Headquarter** | Chennai

**Year of Inception** | 2008

**Organisation Website** | [www.mercuryminds.com](http://www.mercuryminds.com)

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

**Organisation Name** | NinetyNine Tests Software

**Headquarter** | Bengaluru

**Year of Inception** | 2011

**Organisation Website** | [www.99tests.com](http://www.99tests.com)

**Brief Description** | A crowd sourced software testing platform for enterprises

**Organisation Name** | Niqotin

**Headquarter** | Chennai

**Year of Inception** | 2008

**Organisation Website** | [www.niqotin.com](http://www.niqotin.com)

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

**Organisation Name** | Ojas Testing Solutions

**Headquarter** | Bengaluru

**Year of Inception** | 2011

**Organisation Website** | [www.ojastestingsolutions.com](http://www.ojastestingsolutions.com)

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

**Organisation Name** | Reasoning Global eApplications Pvt. Ltd.

**Headquarter** | Hyderabad

**Year of Inception** | 2007

**Organisation Website** | [www.martjack.com](http://www.martjack.com)

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

**Organisation Name** | Techcello

**Headquarter** | Tanjore

**Year of Inception** | 2009

**Organisation Website** | [www.techcello.com](http://www.techcello.com)

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

**Organisation Name** | Waybeo Technology Solutions

**Headquarter** | Trivandrum

**Year of Inception** | 2009

**Organisation Website** | [www.waybeo.com](http://www.waybeo.com)

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

**Organisation Name** | ZipDial

**Headquarter** | Bengaluru

**Year of Inception** | 2010

**Organisation Website** | [www.zipdial.com](http://www.zipdial.com)

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

# Emerge 50: Growth

**Organisation Name** | ABIBA Systems

**Headquarter** | Bengaluru

**Year of Inception** | 2006

**Organisation Website** | [www.abibasystems.com](http://www.abibasystems.com)

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

**Organisation Name** | BitRhymes (India) Pvt. Ltd.

**Headquarter** | Bhubaneswar

**Year of Inception** | 2008

**Organisation Website** | [www.bitrhymes.com](http://www.bitrhymes.com)

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

**Organisation Name** | Capillary Technologies

**Headquarter** | Bengaluru

**Year of Inception** | 2008

**Organisation Website** | [www.capillarytech.com](http://www.capillarytech.com)

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

**Organisation Name** | Eko India Financial Services Pvt. Ltd.

**Headquarter** | Delhi

**Year of Inception** | 2007

**Organisation Website** | [www.eko.co.in](http://www.eko.co.in)

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

**Organisation Name** | Foundation Futuristic Technologies Pvt. Ltd.

**Headquarter** | New Delhi

**Year of Inception** | 1999

**Organisation Website** | [www.forensicsguru.com](http://www.forensicsguru.com)

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

**Organisation Name** | Freshdesk Inc.

**Headquarter** | Chennai

**Year of Inception** | 2010

**Organisation Website** | [www.freshdesk.com](http://www.freshdesk.com)

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

**Organisation Name** | Maven Systems Pvt. Ltd.

**Headquarter** | Pune

**Year of Inception** | 2009

**Organisation Website** | [www.mavensystems.com](http://www.mavensystems.com)

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

**Organisation Name** | mCarbon Tech Innovation Pvt. Ltd.

**Headquarter** | New Delhi

**Year of Inception** | 2008

**Organisation Website** | [www.mcarbon.com](http://www.mcarbon.com)

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

**Organisation Name** | NMSWorks Software Pvt. Ltd.

**Headquarter** | Chennai

**Year of Inception** | 2001

**Organisation Website** | [www.nmsworks.co.in](http://www.nmsworks.co.in)

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

**Organisation Name** | OpCord Consultancy Services Pvt. Ltd.

**Headquarter** | Bengaluru

**Year of Inception** | 2009

**Organisation Website** | [www.opcord.com](http://www.opcord.com)

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

**Organisation Name** | Openlabs Technologies & Consulting Pvt. Ltd.

**Headquarter** | NOIDA

**Year of Inception** | 2010

**Organisation Website** | [www.openlabs.co.in](http://www.openlabs.co.in)

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

**Organisation Name** | Ozonetel Systems Pvt. Ltd.

**Headquarter** | Hyderabad

**Year of Inception** | 2007

**Organisation Website** | [www.ozonetel.com](http://www.ozonetel.com)

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

**Organisation Name** | SISA Information Security Pvt. Ltd.

**Headquarter** | Bengaluru

**Year of Inception** | 2003

**Organisation Website** | [www.sisainfosec.com](http://www.sisainfosec.com)

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

**Organisation Name** | Tyroo Media

**Headquarter** | Gurgaon

**Year of Inception** | 2006

**Organisation Website** | [www.tyroo.com](http://www.tyroo.com)

**Brief Description** | Tyroo Media is a fast growing online performance and display advertising platform

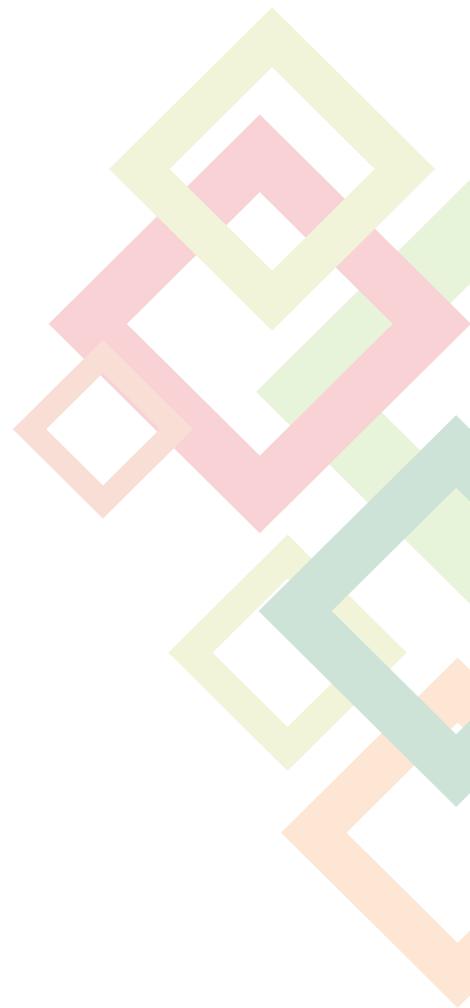
**Organisation Name** | Vizury Interactive Solutions Pvt. Ltd.

**Headquarter** | New Delhi

**Year of Inception** | 2008

**Organisation Website** | [www.vizury.com](http://www.vizury.com)

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



# An Umbrella Health Insurance Cover For NASSCOM Members

## The Classic Dilemma of a Small & Medium IT Company


DEMANDS

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




CHALLENGES

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

The Solution



A plan exclusively created considering NASSCOM members' needs & challenges

### The TechieHealth Advantages:



Options to choose the Sum Insured



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



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



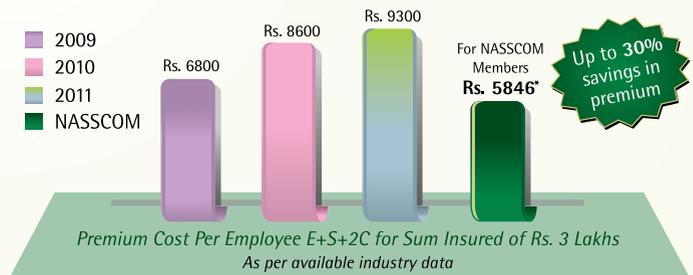
Required expertise for end-to-end support in all health insurance needs



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



Complete Online Insurance Administration thru Medimanager's mPower Online Portal



### Some of our TechieHealth clients:



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