Indian Interactive Technology, Innovative Services and Achievements in KPO

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India

- Area - Total 3.2 Mn km²
- Population – 1.2 bn
- 28 states and 7 union territories.
- 18 languages & > 1000 dialects
- Largest democracy in the world
- GDP growth rate of 5.8% over the past two decades - India is one of the world's fastest-growing economies.
- India's telecommunication industry, the world's fastest-growing

- Entertainment industry market size- 15.1B USD (2013) - 30.5 B (2017 est.)
SECTION1
Interactive technology growth in India
INDIANS ARE VERY SOCIAL

- 70% of all Indian netizens are on Facebook, i.e., approx 61.5 Mn. No 3 in the world.
- 15 Mn Indians are on Twitter. India has the 4th largest base of Twitteratis.
- 35 Mn unique visits in a month with a reach of almost 55% of Indian online population.
- 12.4 Mn unique visits in a month which is the 2nd largest base in the world.
- 19 Mn Indians have a LinkedIn profile. That’s the 2nd highest in the world.
Mobile internet

- India is world’s third largest Internet user after U.S., China
- 165 M internet users with 7 out of 8 accessing internet from their mobile phones
- Smartphone users in India is 67M this year and estimated to reach 0.4B by 2016.
- 60M internet users now actively consume video content.
- 3G subscriptions - 56M in 2013 and to touch 0.25B by 2016.
- Mobile Internet is opening doors for large-scale monetization of digital content through paid apps

Number of smartphone users (Mn)

![Bar chart showing growth in smartphone users from 2008 to 2012 for different countries with CAGR (08-12) labels at 90%, 36%, 121%, and 145%.]
Digital Advertizing

- Digital advertizing is contributing more than 80% of the revenue of M&E industry (USD 4.31B)

- Online video consumption in India has doubled in the last 2 years & grown 74% in the last 2 years.

- India is ranked 3rd in the world in watching videos online through a PC/laptop & 4th on watching videos on the phone.
Entertainment industry

- Focus is growing in Kids genre
- Surge in 3D, HD movies in theatres and use of animation and VFX in TV and advertisement
- Growing outsourcing of VFX and gaming to India due to cost effectiveness of Indian players
- Content localization is also on the rise
- Total market share (in revenue) of Radio, Animation & VFX, gaming and digital advertizing to reach **15% by 2017** from 11% in 2012.
Emerging Segments in Entertainment Industry

- During 2012–17, emerging segments are expected to develop at a CAGR of:
  - Digital advertising (41.6 %)
  - Gaming (28.8 %)
  - Radio (21.2 %)
  - Animation (20.1 %)
Advantage India

ROBUST DEMAND

- Rising incomes and evolving lifestyles
- Growing young population and with high access to technology
- Falling prices & Higher penetration

ATTRACTION OPPORTUNITIES

- Opportunities: Industry is set to expand at a CAGR of 15.1% over 2012-17, one of the highest rate globally
- Television and the AGV segments expected to lead industry growth;

INCREASING INVESTMENTS

- Higher FDI inflows
- Increasing Mergers and Acquisition activity
- Entry of big players across all segments of industry

POLICY SUPPORT

- Increasing FDI limits
- Policy to enhance growing segments (animation, gaming)
- Increasing liberalization and tariff relaxation
SECTION 2
Knowledge Process Outsourcing
India KPO Industry

- India is a dominant player in this market with **70% of the world market share** - will cross **$30 billion** in next two years
- Has employed over **3,50,000 knowledge process outsourcing professionals**
- Offers **market research, data analytics, legal services, content and publishing services, pharmaceutical data processing etc.**
- Areas with significant KPO influence include:
  - Pharmaceuticals; Integration and management services; Financial services; Research and analytics; Computer aided simulations, Computer aided design (CAD); Engineering design and professional services etc
India a favorable destination for KPO

- Competitive labor cost
- Quality services
- Large talent pool
- English language skills
- Proactive government policies and
- Extensive experience in forging strong client relationships
Major KPO Players & Services Hubs

Comprises four different types of vendors:

- **BPO companies** venturing into the KPO services domain
- **Individual companies** providing specialized services locally and globally
- Highly specialized **groups of individuals** offering specialized services to global markets
- **Individuals** providing their services inputs

Top 5 KPO companies:
Genpact, Evalueserve, Ugam Solutions, WNS, 24/7 Customer
India as an Outsourcing Destination

- **Indian Companies Exploring Expansion Opportunities Overseas**
- Clients are increasingly demanding localized services.
- Operating in different geographies with varying time zones helps in offering 24/7 services

<table>
<thead>
<tr>
<th>KPO Segments</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animation</td>
<td>Philippines, India, China</td>
</tr>
<tr>
<td>Engineering Services</td>
<td>Philippines, India</td>
</tr>
<tr>
<td>Content Development</td>
<td>India, Philippines</td>
</tr>
<tr>
<td>Financial Services</td>
<td>India, China</td>
</tr>
<tr>
<td>Healthcare</td>
<td>Russia, India</td>
</tr>
<tr>
<td>R&amp;D</td>
<td>India, China, Russia</td>
</tr>
<tr>
<td>Legal</td>
<td>New Zealand, India</td>
</tr>
<tr>
<td>Pharma</td>
<td>India, Russia</td>
</tr>
</tbody>
</table>
Future of KPO in India

- KPO players are now turning to Tier-II cities such as Jaipur, Chandigarh and Pune
- Will create endless area for businesses to explore
- Create lakhs of jobs for engineers, MBAs, doctors, lawyers and other professionals
Thank You!
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