

Sector Brief – June 2015

Top 20 Players in IT sector:

Top 20 IT-BPM Employers:

TOP 15 BPO Companies:

S.No	Company Name	S.No	Company Name	S.No	Company Name
1	Tata Consultancy Services Ltd	1	Tata Consultancy Services Ltd	1	Genpact Ltd.
2	Infosys Ltd	2	Infosys Ltd	2	Tata Consultancy Services Ltd
3	Wipro Ltd	3	Cognizant Technology Solutions India Pvt Ltd.	3	Serco Global Services
4	HCL Technologies Ltd	4	Wipro Ltd.	4	Wipro Ltd.
5	Tech Mahindra Ltd1	5	HCL Technologies Ltd	5	Infosys BPO
6	L&T Infotech	6	Tech Mahindra Limited.	6	Aegis Ltd.
7	Syntel Ltd	7	Capgemini India Pvt. Ltd.	7	Firstsource Solutions Ltd.
8	Mphasis Ltd	8	Genpact Ltd.	8	WNS Global Services (P) Ltd.
9	Genpact India Pvt. Ltd.	9	Serco, Global Services*	9	Hinduja Global Solutions Ltd.
10	iGate	10	Mphasis Ltd.	10	EXL
11	MindTree Ltd	11	Aegis Ltd.	11	Mphasis Ltd
12	KPIT Technologies Ltd	12	iGATE Global Solutions Ltd	12	Tech Mahindra Limited
13	Zensar Technologies Ltd	13	CSC, India	13	HCL Technologies Ltd – Business Services
14	Hexaware Technologies Ltd	14	WNS Global Services (P) Ltd.*	14	Eclerx Services Ltd
15	Cyient	15	Syntel Ltd	15	Syntel Ltd
16	NIIT Technologies Ltd	16	L&T Infotech		
17	Infinite Computer Solutions (India) Ltd	17	Firstsource Solutions Ltd*		
18	Persistent Systems	18	EXL*		
19	Geometric Ltd	19	Hinduja Global Solutions Ltd*		
20	MASTEK Ltd	20	MindTree Ltd		

Source: NASSCOM. Tabulated data is for 2013-2014. This list does not include some firms whose corporate headquarters are located outside India, but have significant India-based delivery capabilities, and have not shared their India-based revenue figures. Had they been ranked based on their India revenues, firms such as Convergys, Accenture, Concentrix and Sutherland Global Services would have also appeared in this list.

Current Updates:

India's biggest engineering company Larson and Turbo, may spend between \$100 million and \$1 billion on acquisitions for its software services unit as the subsidiary prepares for an initial public offering.

Social networking services company Facebook has launched a new project named internet.org which aims at providing online services to developing countries for free. Internet.org allows people to download an app and browse certain health, employment and local news websites without paying data charges. But because it provides access to only a few services picked by Facebook, some critics say it breaks the principles of net neutrality, where all services should be available equally.

Prime Minister Narendra Modi's recent visit to China is expected to bring in a new hope for stronger economic cooperation between China and India. Even though China has raised many artificial trade barriers. For example, it keeps a high tender rate for procuring IT services, which has discouraged IT companies from participating. A trade agreement with China on this sector could help boost our exports.

During 2012-2014 India Based outsourcers bagged nearly 25% of the top 100 IT deals. Analysis of outsourcing deals worldwide in the past three calendar years revealed that top five vendors captured 50 percent of the total contract value as against 43 percent in 2013. The value of deals bagged by the respective top five vendors with captive units are given in the diagram below:



The ministry of women and child development (WCD) along with the department of electronics and information technology (DEITY) has initiated a web portal named khoyapaya.gov.in which will have the details of missing children and will help track such cases. The website will act as an enabling platform to report children missing or found. This is likely to be launched in June and will be run with the assistance of Childline and local police.

Future Trend:

About 25% of the India's exports are IT-related products. The IT sector is expected to grow 12-15% in the coming years. The exports from this sector are expected to swell to \$112 billion by the end of the year.

Policy Announcements:

The government has finalised BPO policy for smaller towns and has approved 48,000 seats for setting up call centres across the country. These will be divided across the states on the basis of their population. The policy aims to provide incentives to companies for setting up BPOs in small towns of the country. Currently, the IT profile of India shows hubs in few limited cities like Gurgaon, Pune, Hyderabad, Chennai, Vijaywada, Bengaluru, and Mysore and this needs to be widened across the country, particularly in small mofussil towns.