



**Copenhagen Business School**  
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# ITC Group



- ❑ **ITC Limited – Commenced our 100<sup>th</sup> year of leadership**
  - Revenue : USD 5+ billion
  - Market Capitalization : USD 20+ billion
  - Amongst the top 20 Indian companies in terms of market capitalization
  - Forbes Fab 50 in Asia (2006)
  
- ❑ **Global Leadership in Sustainability - Inducted in UN Global Compact, Supports livelihood of over 5 million people**
  
- ❑ **ITC Infotech - 100% subsidiary of ITC Limited**
  
- ❑ **Direct Group Employment - 29,000+ people in 20 countries**

**CARBON POSITIVE:  
3 YRS IN A ROW**

**WATER POSITIVE:  
6 YEARS IN A ROW**

**NEAR ZERO SOLID  
WASTE DISCHARGE**



**Consumer Goods**



**Hospitality, Travel & Leisure**



**Agri-Business**



**Paper, board, Printing & Packaging**



**Infotech**

# Largest consumer goods business in India

- Largest 'fast moving consumer goods' company in India
- Owns & markets 3 of India's top 5 FMCG brands
- Competitive advantage
  - Largest distribution network - Direct servicing of 85000 markets & nearly 3 million retail outlets
- Rapid market share gains in new categories – Personal Products & Safety Matches



# Paperboards & Packaging

## Largest Mill Operations in Afro-Asian region

- Market leader in value added paper & board
- Largest converter – paper based packaging
- Contemporary technology
  - Elemental Chlorine Free (ECF) Pulp Mill - Only one in India
- End-to-end IT enablement of value chain
  - Tree to Tetrapack



ITC's  
ECF brands



Indo barr



# Hotels Business

- ITC-Welcomgroup: India's 2<sup>nd</sup> Largest hotel chain
  - Over 5200 rooms under 4 distinct brands
- Highest operating efficiency amongst the 3 leading chains
- Leverages unique service proposition and international alliance with Starwood Hotels & Resorts



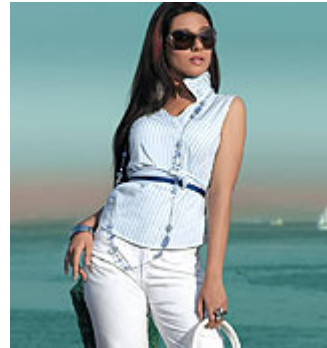
# Agri Business

- Farm linkages in 14 states covering Soya, Wheat, Tobacco, Rice, Marine products, Edible nuts, Coffee
- ITC – India’s largest buyer, processor, consumer & exporter of cigarette tobaccos
- Leveraging IT for the transformational ‘e-Choupal’ initiative
  - World’s largest rural digital network
  - Over 38000 villages linked through 6400 e-Choupals servicing over 4 million farmers



# Lifestyle Retail Business

- Up-market product range available in exclusive Wills Lifestyle stores and multi-branded outlets/ large format retail stores across the country
- State-of-the-art Master Facility & RFID aids speed of go-to-market
- Outsourced JIT plant for 'quick response' manufacturing
- Product and brand range being expanded
  - Premium segment comprising the 'Classic' range of formal wear, 'Wills Sport' relaxed wear and 'Wills Clublife' evening wear
  - Strong distribution network in place for the mid-market brand 'John Players'

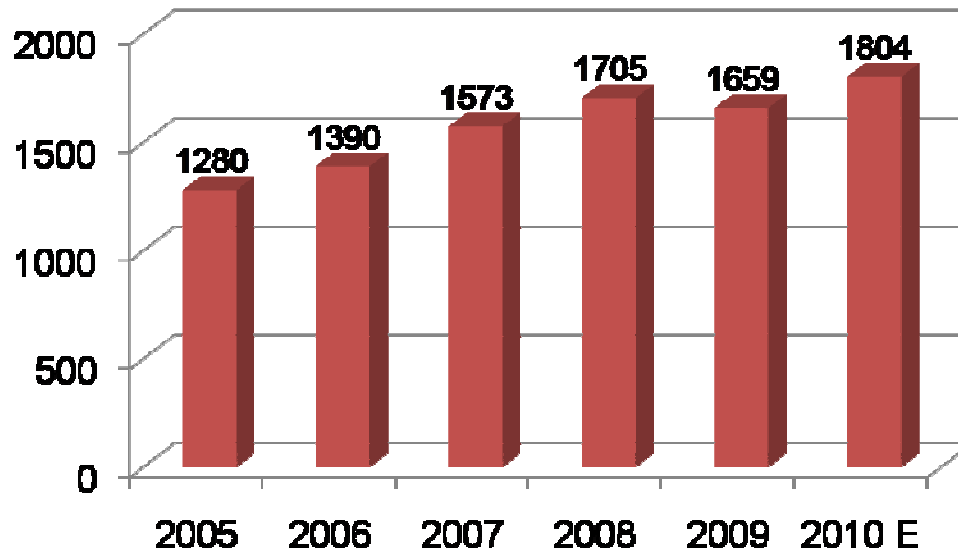






# Global IT Industry

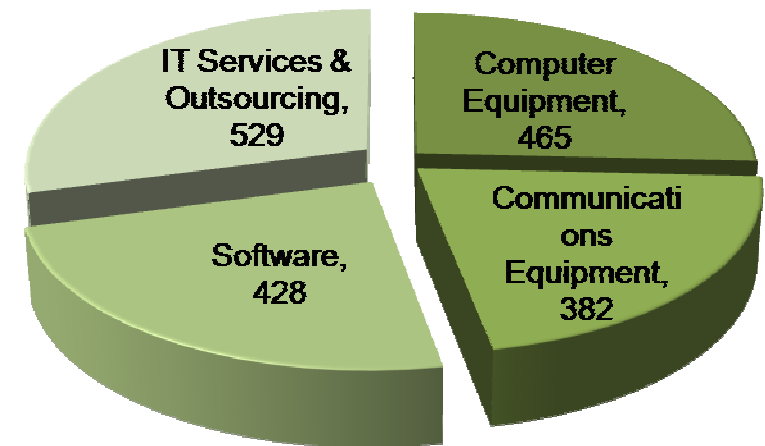
**Global IT Industry (USD billion)**



**Global IT is a growing trillion \$ industry**

**IT Services & Outsourcing is the largest component at 29%**

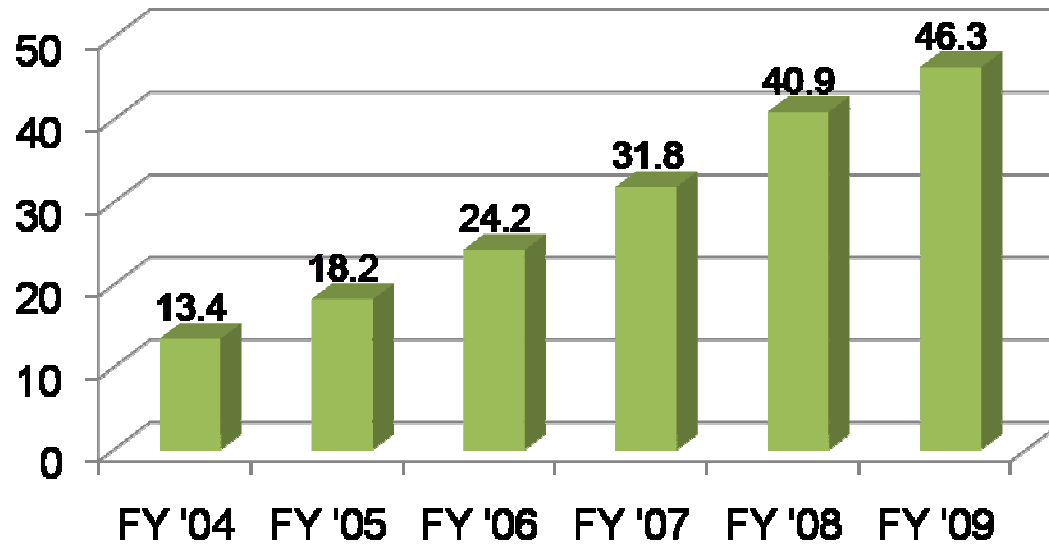
**Estimated growth of IT Services & Outsourcing - 9%**



Source: Gartner

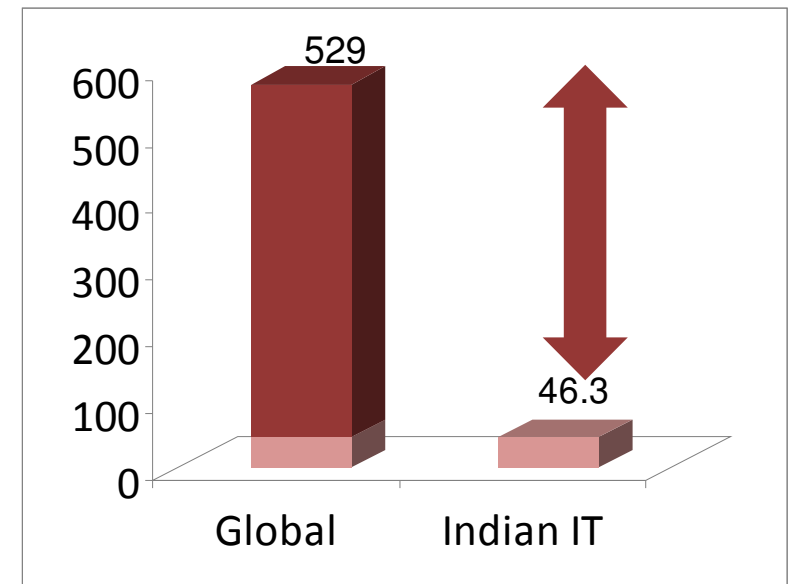
# Indian IT Industry

**Indian ITES Revenues (USD billion) \***



**Indian IT CAGR 2004 – 2009: 28 %**

**Ample Headroom for continued growth**



\* Includes BPO  
Source: NASSCOM

# Trends in Indian IT Industry

## Beyond Arbitrage

- Offshore Labor Cost saving taken for granted
- Customers seek additional savings / Value

## Global Delivery

- IT becoming a global shared service in most large organizations.
- Vendors need to be able to support across the globe

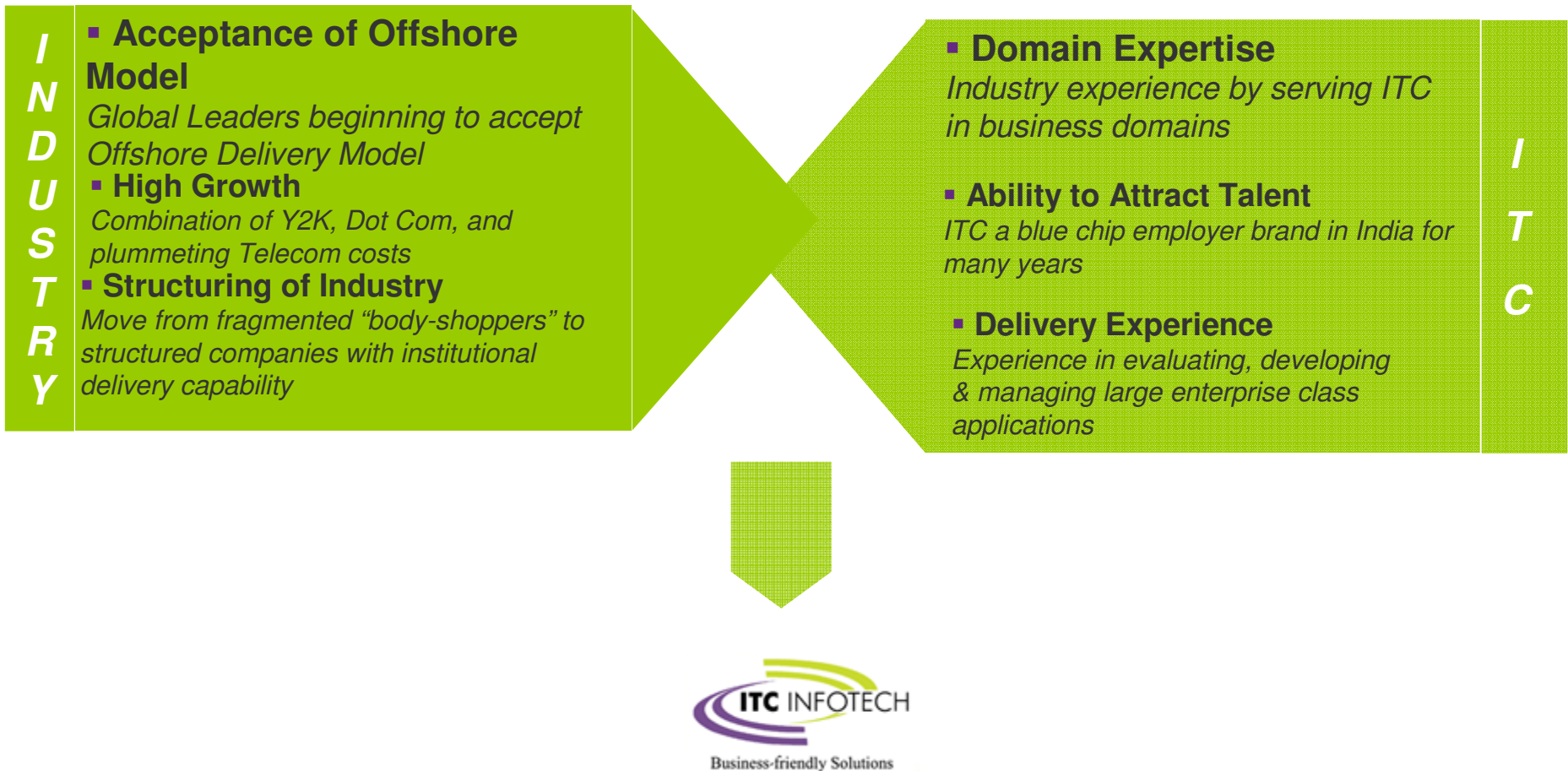
## Techno Functional Expertise

- Technical capability is ‘table stakes’.
- Customers seek confluence of domain and technology skills

## Range of Engagements

- Industry seeing a demand for varied types of engagement models – as diverse customers across the globe seek to offshore

# Origin of ITC Infotech - 2000



# ITC Infotech at Glance

<b>Year of inception</b>	2000
<b>Ownership</b>	100% subsidiary of ITC Ltd
<b>Subsidiaries</b>	<ul style="list-style-type: none"> <li>100% owned subsidiaries in US , UK and SA</li> <li>Acquired Pyxis Solutions, a niche player in Quality Assurance &amp; Testing services</li> </ul>
<b>Certifications</b>	<ul style="list-style-type: none"> <li>SEI-CMM Level 5 certified – in the first year</li> <li>SAP AMS</li> <li>ISO 27001</li> <li>ISO 9001:2000</li> <li>CCOE certification</li> <li>SAP Global AMS Partner</li> </ul>
<b>Growth</b>	62% plus CAGR over 8 years
<b>People</b>	4200+ employees
<b>Infrastructure</b>	35 acres owned infrastructure in the heart of Bangalore city



Featured in the “Leaders” category for Global Outsourcing 100



Featured in the Forrester Wave report on Indian SAP Services

Leading Player in CRM / CPG space

Leading Infrastructure Services Provider

# Acquisition



- **Pyxis Solutions LLC**
  - Acquired in August 2008
  - QA Testing Solutions provider
  
- **Services**
  - QA Management Consulting
  - Functional Testing
  - Data Validation Testing
  - Quantitative Analysis Testing
  - Automated Testing
  - Load Testing / Performance Engineering
  - Environment and Release Management



# Critical Success Factors

**Depth of  
Relevant  
Capabilities**

***Depth in relevant capabilities ( Technology & People) for target customer segments***

**Global  
Reach**

***Ability to Deliver services in every region that target customers are in***

**Domain  
Expertise**

***Industry expertise in chosen vertical segments***

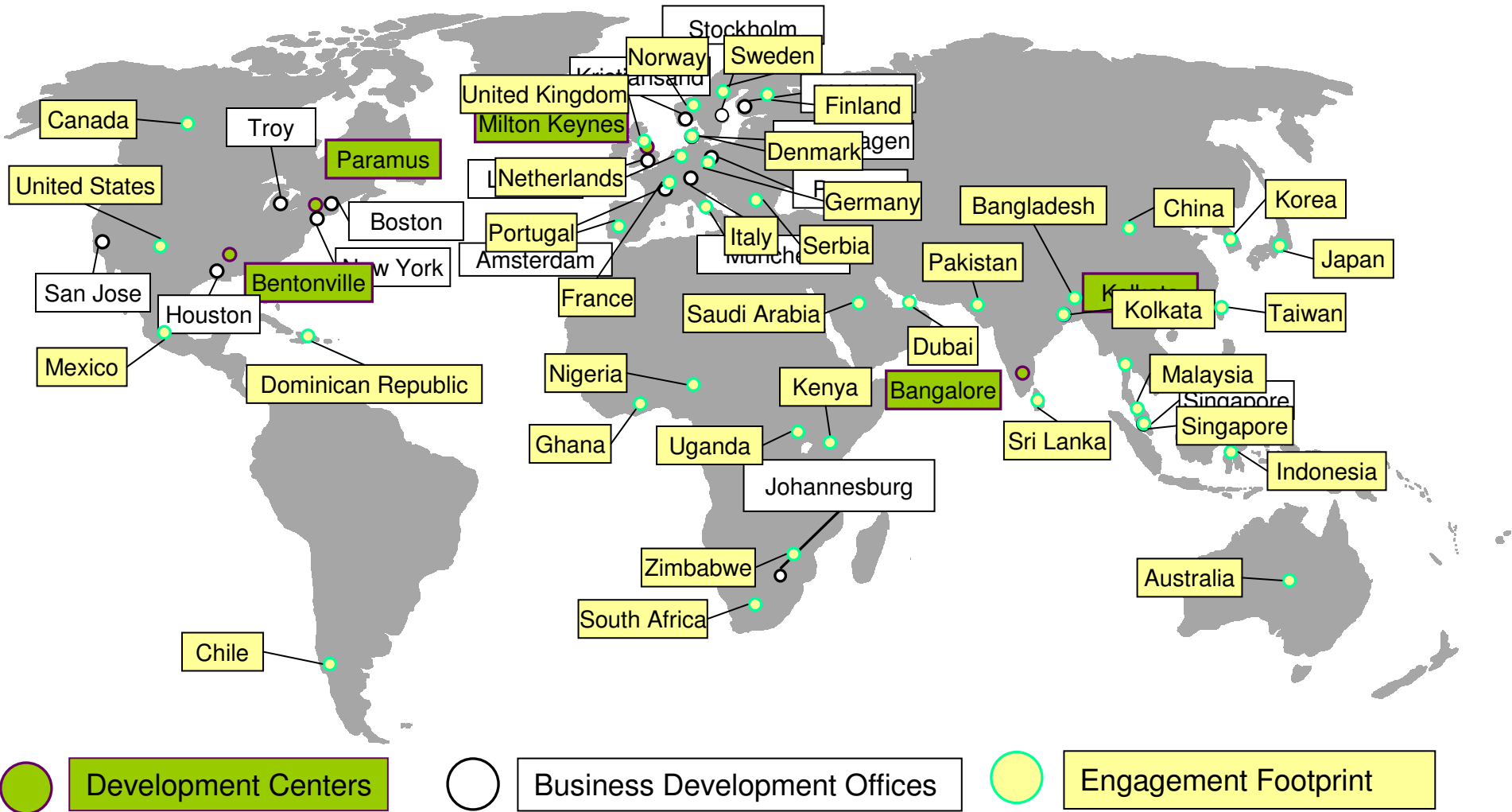
**Engagement  
Models**

***Flexibility to offer multiple engagement models tailored for customers varied needs***

**Low  
Cost  
Delivery**

***Cost efficient delivery by use of Training Investments, Industry Methodology & Managing Employee Churn***

# Global Reach





# Key Value Proposition

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- Mid sized company - part of a very large & reputed 100 year old company
  - 'Large enough to care, small enough to care'
  - ITC Limited lineage – 'business focussed IT delivery' – domain and technology
  - Deliver values of offshore but under customer's realities – lower risks, focus on non core activities, cultural fit
  
- Focussed on Europe and Scandinavia
  - Danske Bank, Finnair, Aker, Alpha Laval, Kone ..
  - Branch offices and local operations in each country
  - Specific technical and soft skill base for each region

