

# INDIAN ROOTS, AMERICAN SOIL:

A Look at Indian Companies  
in the U.S. Economy



Confederation of Indian Industry



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# Foreword

India is a country undergoing multiple transformations. Steady economic growth in the last decade has created a large middle - class whose consumption has become an engine for economic growth. A mostly rural society is becoming increasingly urban, and the process of urbanization is creating its own set of demand for goods and services that is required to support and urban lifestyle.

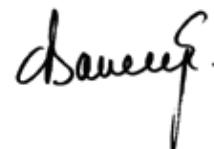
India has made a huge commitment to developing its infrastructure. The government estimates that the country would require and investment of USD 1 trillion in the next five years in the infrastructure sector. CII studies estimate that sustaining a 9 % GDP growth rate would require an overall investment of USD 2.7 trillion into the economy in the next five years.

This appetite for consumption, investment and technology is making India an increasingly outward looking economy. The last five years has seen the country negotiate free trade agreements with major economic blocs across the world. India's free trade agreements with Korea, ASEAN and Japan are already in force and negotiations for a similar agreement with EU are expected to be completed by early 2011.

CII estimates that Indian procurement of US military hardware, civilian aircraft, and nuclear energy related hardware alone will potentially support 270,000 US jobs over the next ten years. This is just the beginning.

Indian demand and Indian investment are already fuelling jobs in many countries overseas, and as such India's economic transformation represents a huge opportunity for trade and investment. This report provides an overview of the contributions that Indian firms are already making to employment generation, investments and community engagement in the US. This is the untold story of Indian companies' presence and involvement in the US economy, and society. However, the survey findings and company profiles presented here are only illustrative examples of a much more comprehensive economic relationship that is only just beginning to take-off.

As the centre of gravity of the global economy shifts towards Asia, India, as an open, democratic society, and free market economy can provide the United States with a market and with cross-border economic linkages while continuing to contribute in substantive ways to the domestic American economy. The survey results and company profiles in this report should be read in that context, as the harbinger of the transformative economic partnership between the world's two largest free market democracies.



**Chandrajit Banerjee**  
Director General, CII







भारत का राजदूत  
वॉशिंगटन, डी.सी.

**MESSAGE**

**AMBASSADOR OF INDIA**  
2107 MASSACHUSETTS AVE, N.W.  
WASHINGTON, D.C. 20008

March 20, 2011.

India-U.S. trade and commercial engagement is a key element of the Strategic Partnership between our two countries. I congratulate the Confederation of Indian Industries (CII) and the CII-India Business Forum for focusing on this significant aspect of our rapidly growing relationship, and for highlighting the value creation by Indian businesses in the U.S. economy. CII and the CII-IBF have also made valuable contributions in building a network of business partnerships between the two countries.

The expansion and deepening of economic ties between the oldest and the largest democracy of the world is evident in strong and balanced growth of trade in goods and services; continuing increase in two-way investment and capital flows and business cooperation endeavours across a wide spectrum. Of special significance is the important role that Indian companies have played in forging a strong and wide net of business ties with their counterparts in the United States. Across a range of areas, including pharma, IT, auto components, renewable energy, manufacturing, bio-technology and education, the Indian private sector has led from the front in converting opportunities into mutually beneficial commercial ties that have brought jobs and prosperity in both countries.

Indian businesses have cooperated with U.S. companies in developing globally relevant products, processes and technology solutions. They have invested widely in the U.S. economy in diverse sectors in the fields of services and manufacturing; have generated and sustained thousands of direct and indirect jobs in the U.S. economy and have contributed to the global competitiveness of U.S. companies. Indian businesses continued local hiring in the United States even when the global economic down turn was posing considerable challenges in the U.S. job market.

As India and the U.S. continue their task of building a stronger economic partnership I am confident that Indian companies, the US affiliates of Indian businesses, and the CII-India Business Forum would continue to play a vital role in realizing the enormous potential to build mutual prosperity

(Meera Shankar)  
Ambassador of India



# The Role of Indian Firms in the US: Employment, Investments, and Community Involvement







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# The Role of Indian Firms in the US: Employment, Investments, and Community Involvement

During his recent landmark visit to India in November 2010, US President Barack Obama remarked that “the relationship between the United States and India will be one of the defining partnerships of the 21st century.” This fact is apparent in not just the burgeoning trade and investment relationship between the two countries, but also in the converging strategic and political imperatives, which align the countries’ interests. The strength of the people to people relationship between India and the United States is well known, and is evidenced by the active community of Indian Americans who are making their impact felt in all spheres of life. A less well-known story, however, is that of the growing contribution of Indian companies that have operations in the United States. Today, hundreds of companies of Indian origin are present in the US, and are actively contributing to the US economy by saving, maintaining, and creating jobs, investing in research & development, and generating income— activities that while adding value also have the positive consequence of making US companies more competitive in the global market. Indian companies, in this regard, have enhanced the broader US-India bilateral economic relationship and continue to do so.

Not only an increasingly important trading partner, India is the second fastest growing investor in the United States. Between the years 2000 and 2010, flows

of investment capital from India grew at an annualized rate of 53%, with the volume of investments pegged at \$4.4 billion in 2009.<sup>1</sup> These investments were in a wide range of sectors, including pharmaceuticals, telecommunications, healthcare, oil and coal, iron and steel, and information technology.

## Survey Conducted by the CII-India Business Forum

In the following pages, the results of a survey, conducted by an initiative of the Confederation of Indian Industry (CII), the India Business Forum (IBF) in the US, highlight the numerous contributions of Indian industry to both the US economy and society. The results underscore the critical role Indian Companies have played in saving, creating and sustaining jobs, investing extensively in the US economy, and setting up R&D and manufacturing facilities that spur innovation and enhance competitiveness.

The CII-IBF seeks to call attention to the role of Indian companies in the United States, while building ‘Brand India’ through educational outreach, information sharing, and other activities. The forum provides an organized platform for its members to express their views and opinions on issues related to trade, commerce, investment, and more.

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<sup>1</sup> U.S.-India Economic and Trade Relationship: Indian Investment in the U.S. <http://www.whitehouse.gov/the-press-office/2010/11/06/us-india-economic-and-trade-relationship-indian-investment-us>. (These figures do not take into account mergers and acquisitions undertaken by Indian firms.)

## The current members of the India Business Forum include:

1. Apollo Health Street
2. Bank of Baroda
3. Birlasoft, Inc.
4. Dastur International, Inc.
5. Dr. Reddy's Laboratories Ltd.
6. Essar Americas
7. Exim Bank of India
8. HCL America, Inc.
9. ICICI Bank Ltd.
10. Infosys Technologies Ltd.
11. Infotech Enterprises America, Inc.
12. Jubilant Biosys Ltd.
13. Larsen & Toubro Ltd.
14. Lupin Pharmaceuticals, Inc.
15. Mahindra Satyam
16. Mahindra USA, Inc.
17. MindTree Ltd.
18. NIIT Technologies, Inc.
19. Piramal Critical Care, Inc.
20. Polaris Software Lab Ltd.
21. Ranbaxy Laboratories Ltd.
22. Religare Enterprises Ltd.
23. State Bank of India
24. Suzlon Energy Ltd.
25. TATA Communications
26. TATA Consultancy Services Ltd.
27. TATA Sons
28. Welspun Tubular LLC
29. Wipro Technologies
30. Wockhardt USA LLC
31. Zee TV Americas
32. Zensar Technologies, Inc.

### CII-IBF Survey: An Analysis of Indian Companies Operating in the US

US operations of India-based companies are playing a key role in generating employment in the US while also investing significantly in research & development. These companies are increasingly involved with social activities that positively impact the local US communities in which they operate. Moreover, this trend is not only prevalent in sectors such as Information Technology (IT) and Financial Services, but also in oil and gas, food processing, and others. This was apparent in the CII-IBF survey of 35 Indian companies with operations in the US, covering a wide range of sectors.

Among the numerous contributions, the surveyed companies collectively saved 2,585 jobs from being eliminated through acquisitions of US firms. Furthermore, since the time of the acquisitions nearly two-thirds of the companies have added more jobs, further increasing their workforce in the US.

The study also indicated that a total of forty-five merger and acquisition deals have been completed since 2005, with the surveyed companies' investments in the US equaling nearly \$5.9 billion. Additionally, nearly one-third of these companies expressed their intent in making further investments in the US. Together they employ over 60,000 people across forty States and the District of Columbia.

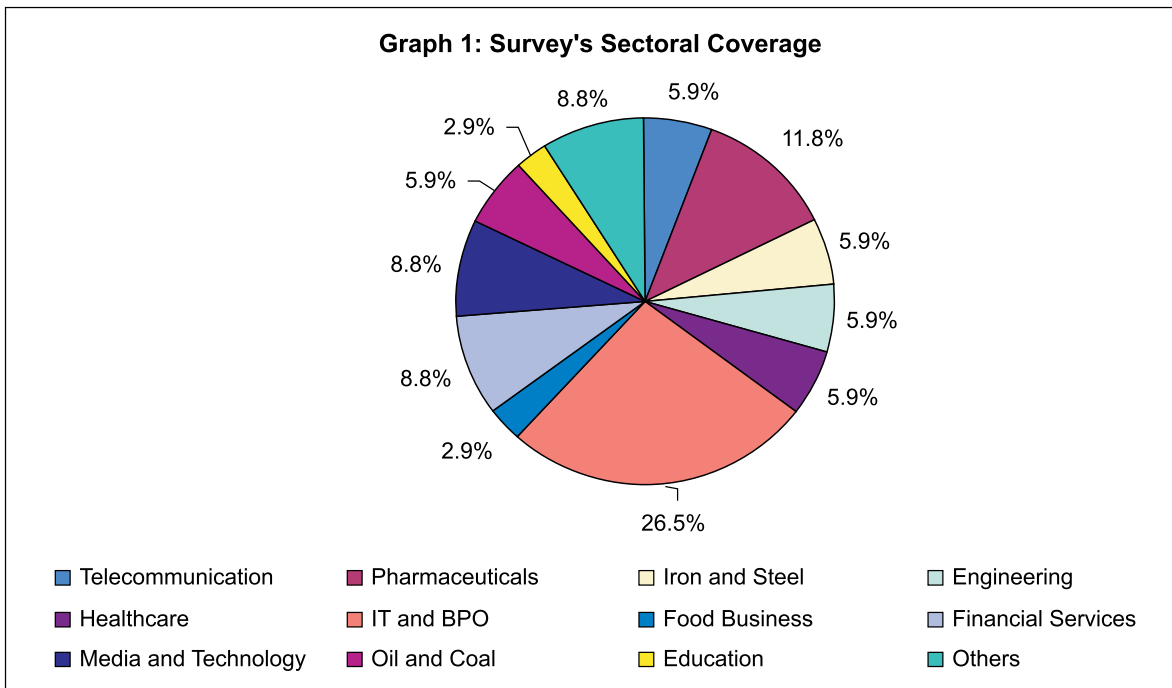


Table 1. States with a Presence of Surveyed Indian Companies

Arizona	Indiana	Nebraska	South Carolina
Arkansas	Iowa	New Hampshire	South Dakota
California	Kansas	New Jersey	Tennessee
Colorado	Kentucky	New York	Texas
Connecticut	Louisiana	North Carolina	Utah
Delaware	Maryland	North Dakota	Virginia
District of Columbia	Massachusetts	Ohio	Washington
Florida	Michigan	Oklahoma	West Virginia
Georgia	Minnesota	Oregon	Wisconsin
Illinois	Missouri	Pennsylvania	Wyoming

The findings in this representative sample are indicative of the broad impact of Indian companies and their contributions to the US economy. The results of the survey have been enumerated below.

Sectoral Coverage: **Graph 1** illustrates the sectoral composition of the survey respondents; Information Technology (IT) and Business Process Outsourcing (BPO) sectors comprised the largest number of respondents (27%), followed by Pharmaceuticals (12%), Financial Services (9%), and Media & Technology (9%).

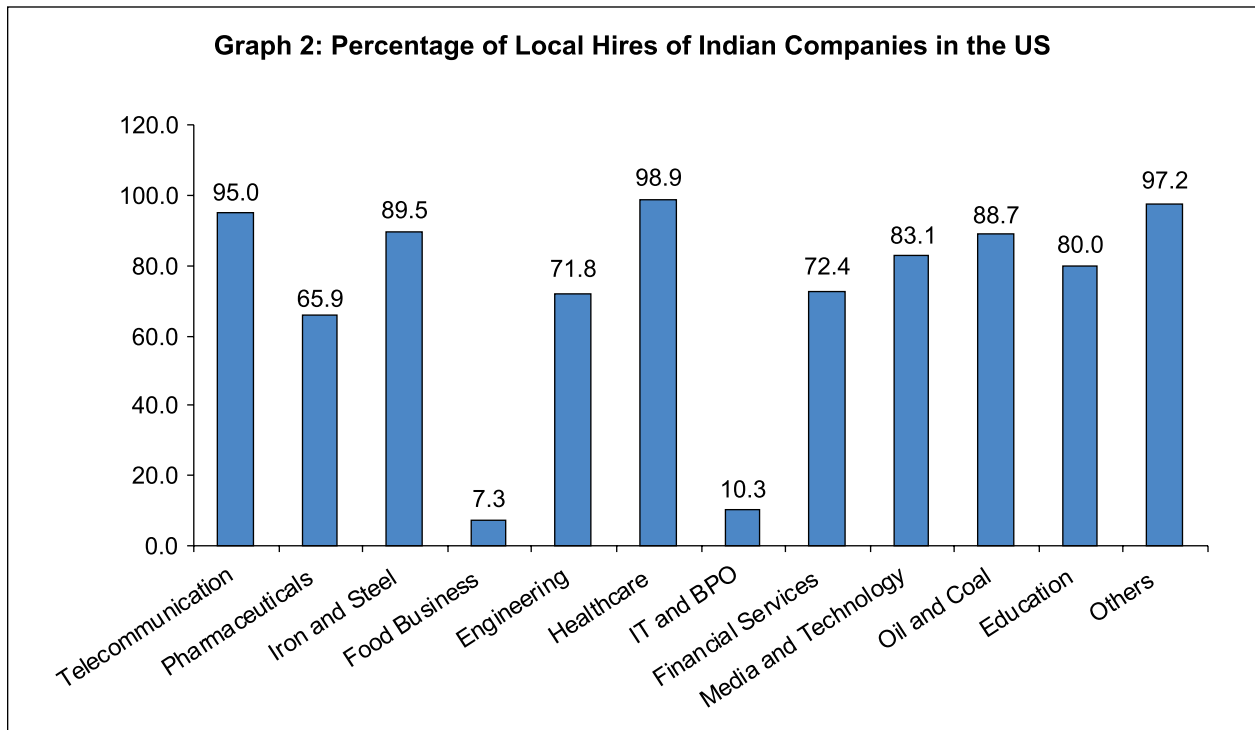


## Local Employment Generation

The popular misconception is that Indian firms typically hire Indian workers for their US operations while not providing employment opportunities for US workers. However, **Graph 2** clearly shows that the reality is very different. An overwhelming majority of workers employed in the US operations of CII member companies are US citizens. The survey findings reveal that Indian companies in the US follow a non-discriminatory approach; in a majority of sectors, more than 80% of the employees are locally hired, with the median being 83% from all the companies studied. In particular, Telecommunication, Healthcare, Education, Media, Iron and Steel, and

Oil sectors lead this charge, while IT and BPO, and food processing businesses seem to exhibit less dependence upon the US workforce. This may be explained by a skills shortage in the US, as well as the availability of a highly qualified Indian workforce that dominates the IT and BPO sector not only in the US, but also globally.

While the IT and BPO sector might employ a higher proportion of Indian workers in their US operations, Indian investment in the US, related to IT and BPO, has contributed to the competitiveness of US industry in general. Indian investments in the education and food sectors have also created a significant number of US jobs.





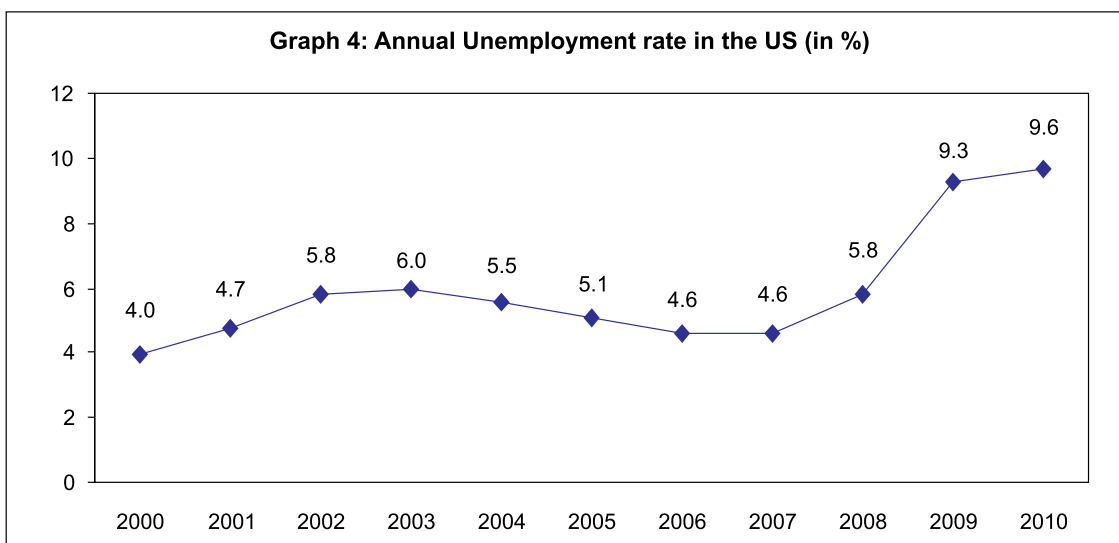
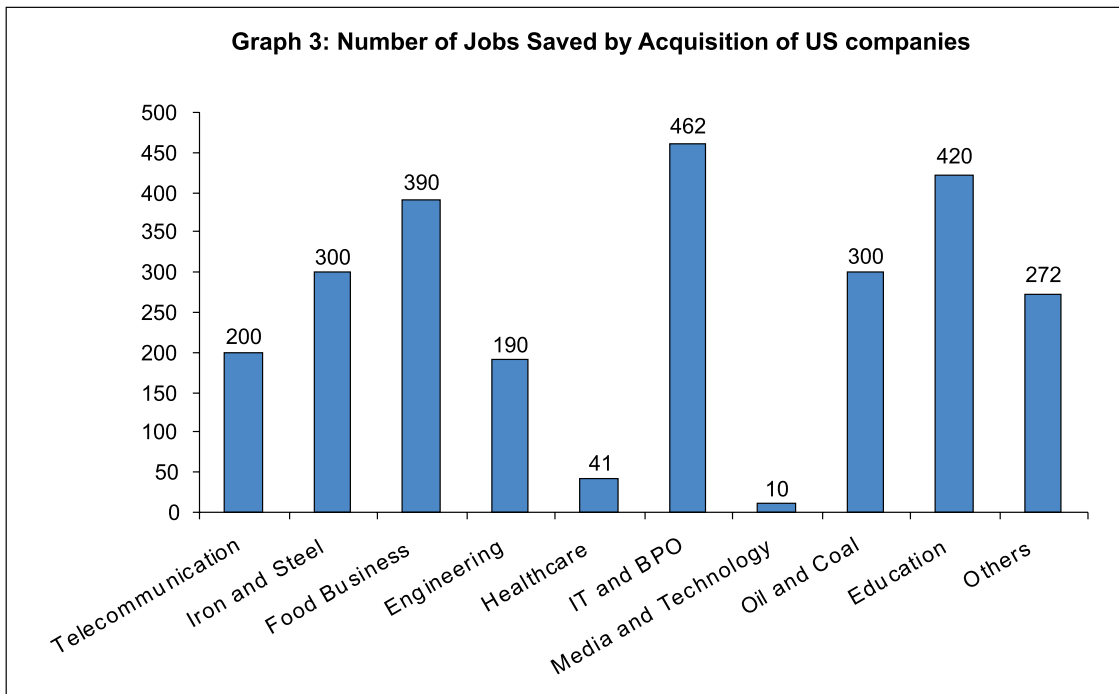


## Indian Companies in the US Saved Jobs During The Recession

The results indicate that a total of 2,585 jobs were saved from being eliminated through acquisitions of US firms by the surveyed companies. **Graph 3** provides the sector breakdown of these results. Furthermore,

22 of the 35 companies revealed that they have increased their workforce in the US since 2005.

**Graph 4** indicates that during the last decade, the unemployment rate in the US was at its peak in 2010. Therefore, by hiring US citizens, Indian companies are playing a crucial role in addressing the problem of



Source: U.S. Bureau of Labor Statistics



high unemployment. This is true of all sectors covered in the survey.

### **Increasing Investments in Research & Development**

Additionally, this survey captured details of India Inc's R&D expenditure in the United States. Respondents from four sectors, namely Telecommunications, Pharmaceuticals, IT and BPO, and Renewable Energy Manufacturing, expressed that their respective employers undertake R&D activities in the US. In fact, when considering all sectors, one in four of the companies surveyed reported actively engaging in R&D in the US.

### **Local Community Involvement**

Of particular note in the survey was the involvement of Indian companies in the social fabric of the local communities in which they operate. A majority of the Indian companies in the US have channeled their resources towards a variety of social causes.

The following section on company profiles of the members of the CII-India Business Forum presents an overview of the economic role of India's leading companies in the US as well as their significant community involvement, thereby reflecting upon their positive impact on the US economy.

## **Key Findings of the CII-IBF Survey of Indian Companies in the US**

### **Indian Companies Hire Locally in the US**

- Collectively saved 2,585 jobs from being eliminated through acquisitions of US firms
- Since 2005 nearly two-thirds of the companies have added more jobs
- Median average of 83% of the workforce is locally hired

### **Indian Companies in the US Invest in Research & Development**

- Across all sectors, 25% of the companies actively engage in R&D in the US

### **Indian Companies in the US Widely Participate in Improving Local Communities**

- A majority of companies are engaged in a variety of social causes in the communities they operate as indicated in the case studies

# Company Profiles: CII-India Business Forum



The first part of the document discusses the importance of maintaining accurate records in a laboratory setting. It emphasizes that proper record-keeping is essential for ensuring the reliability and reproducibility of experimental results. This involves not only recording the date and time of each experiment but also detailing the specific procedures, reagents used, and any observations made during the process.

Furthermore, the document highlights the need for clear and concise communication among laboratory staff. This includes providing detailed instructions for new team members and ensuring that all team members are aware of the current status of ongoing experiments. Regular meetings and reports are suggested as effective ways to maintain this communication.

In addition, the document addresses the issue of safety in the laboratory. It stresses the importance of following all safety protocols and using appropriate personal protective equipment (PPE) at all times. This includes wearing lab coats, gloves, and safety goggles, as well as knowing the location and use of safety equipment such as fire extinguishers and eyewash stations.

The final part of the document discusses the importance of staying up-to-date on the latest research in the field. This involves regularly reading scientific journals and attending conferences and seminars. The document also suggests that laboratory staff should be encouraged to share their own research findings with the broader scientific community through publications and presentations.



## Apollo Health Street

### Company Background

Founded in October 1999, Apollo Health Street focuses exclusively on the healthcare industry - serving both providers and health plan administrators - giving us a true understanding of the processes and issues within the industry. Apollo delivers revenue cycle support to small and large community hospitals, specialty hospitals, children's hospitals, and university medical centers.

With a proven commitment to quality, Apollo earned ISO 9001 certification from the International Organization for Standardization. This recognition relates to quality management systems which are designed to help organizations ensure they meet the needs of their customers and other stakeholders. ISO also recognized Apollo's comprehensive and stringent information security management system with ISO 27011 certification. This honor is based on protection of data, coherent and comprehensive suite of information security controls, and continuing security controls management. Upon thorough review of the company's compliance efforts, the Health Insurance Portability and Accountability Act recognized Apollo's commitment to confidentiality and privacy for all patient information. Apollo regularly educates our staff with comprehensive HIPAA compliance training.

Apollo Health Street's parent company, Apollo Hospitals, is one of Asia's largest healthcare groups and employs more than 63,000 healthcare professionals. With over 8,500 beds across 50 hospitals, Apollo Hospitals has

a significant presence at every point of the continuum of care. It also runs over 50 primary care clinics, 800 retail pharmacy outlets, and owns the largest third party administrator in India which manages over nine million lives.

The Apollo Group continues to be a major investor in Apollo Health Street, with the other major stakeholders including JP Morgan's private equity fund. The company recorded global revenues of approximately \$100 million (USD) in its most recent fiscal year ending March 31, 2010. The company employs a workforce of more than 3,200 employees with more than 700 located in the U.S.

## Global Footprint of Apollo Health Street

Apollo Health Street's reach is quickly expanding across the globe with more than 170 clients. 13 international delivery centers include four facilities in India and nine locations throughout the United States. In addition, the company also support clients in the US, United Kingdom, Germany, Canada, Bermuda, and Dubai.

## Apollo Health Street in the USA

Apollo Health Street partners with the leading hospitals and healthcare organizations in the U.S. to achieve healthcare's True Return – the financial strength to offer excellent patient care today and tomorrow. Enhancing clients' team and resources, Apollo Health Street develops tailor-made, world-class solutions to tackle healthcare's toughest financial and IT challenges. Solutions combine award-winning customer service with healthcare domain expertise, sophisticated technology, and global resources.

The company's client list represents some of the premier healthcare organizations in the country. They include three of the top ten health systems, three of the top ten health plans, two of the top five preferred provider organizations, and three of the top five healthcare IT companies.

Apollo Health Street is recognized for its leadership in developing and implementing financial and IT solutions that exceed the competition. Providing superior customer service, Apollo has consistently earned a spot on the prestigious Black Book of Outsourcing® Customer Satisfaction Survey – including the honor of No. 1 Healthcare BPO Vendor ranking in both the Payer and Provider segment and in Hospital Revenue Cycle Outsourcing. Among the best in healthcare IT, Apollo is ranked in the top 50 on Healthcare Informatics Top 100 List. The ranking is based on survey data of IT revenue separate from overall company revenue.

## Community Involvement

Apollo Health Street's commitment to excellence extends beyond business relationships as the company proudly encourages a sense of community from all employees. Apollo Health Street, strategically located with nine centers of excellence across the country, supports technical colleges by emphasizing the importance of continuing education specifically focused on the IT/IS support field and offering support through training for college credits and establishing student work programs. We also donate computers to local Boys and Girls Clubs, and support local chambers of commerce.

## Success Factors

Apollo Health Street brings together a deep understanding of the healthcare industry, smart technology, best practices, and global resources. The company offers the advantages that clients need to enhance their business capabilities and strengthen their bottom line. Key factors of success include:

- Advanced, intelligent methodology and technology ensuring a strong ROI
- End-to-end business outsourcing solutions spanning the healthcare market
- Patient friendly service model with a dedicated and trained staff



- Six Sigma methodologies facilitating measurable process improvement, beyond conventional limits
- Blended shore delivery, offering higher quality and faster turn-around times with lower cost
- Global Delivery Model, increasing efficiency and quality while decreasing costs for our clients
- Compliance and confidentiality adhering to HIPAA and other healthcare information regulations
- ISO:9001 certification, solidifying quality standards

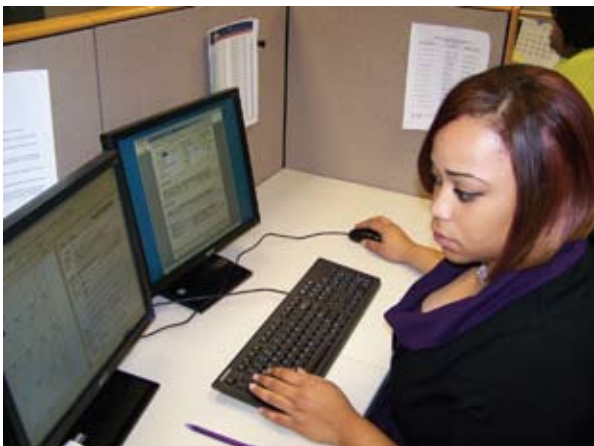
### Future Plans

Apollo Health Street will continue to leverage proprietary technology, Six Sigma processes, and people with deep domain expertise to accelerate cash collections, reduce costs and improve margins

and quality for its clients. With a constant focus on supporting clients through software delivery, customization, implementation, support, and testing, the company will strengthen our client relationships as we improve our operations and delivery.

In addition, Apollo Health Street will be building a Medical Coding Center of Excellence to capitalize on its extensive coding knowledge. With one of the largest in-house teams of AAPC and AHIMA-certified medical coders, Apollo Health Street offers superior comprehensive medical coding solutions that dramatically improve the efficiency and effectiveness of clients' coding departments.

Apollo Health Street is well positioned to rapidly deploy solutions, assist organizations with outsourcing decisions best suited for their needs, and drive better financial outcomes for its clients.



All Apollo employees are trained to adhere to strict security protocols and policies



Apollo's team of experts brings valuable first-hand knowledge



## Bank of Baroda

### Company Background

Bank of Baroda is more than 100 years old and was established in the year 1908.

The Bank has grown consistently in the last few years and has focused business into five channels, namely wholesale, retail SME, rural and agricultural and international. The Bank has launched its sub-brand “Baroda Next” – State of the Art – Straight from the Heart” in July –August 2009 with an aim to emphasize that the Bank is committed to deliver tomorrow’s technology with a human touch and thereby improve Bank’s ability to compete effectively. As of December 31, 2010, the Bank has a total business of US\$ 109 billion and operating profit of US \$ 1,126 million for nine months.

Bank of Baroda has an unparalleled record of continuous profits for more than a hundred years and has won the “Best Bank of the Year” award for the year 2010 by Business India and also the Financial Inclusion Award 2011 instituted by Skoch Consultancy Services Pvt. Ltd. It was also awarded "Bank of Year 2010 - India" in The Banker Awards 2010 of "The Banker" Magazine, UK.





The New York branch of Bank of Baroda participated in the India Day Parade on August 15, 2010 with a float which depicted Mahatma Gandhi.

## Global Footprint of Bank of Baroda

Bank of Baroda started its overseas journey by opening its first branch way back in 1953 in Mombassa, Kenya. Since then the Bank has come a long way in expanding its international network to serve NRIs / PIOs, Indian Corporates around the world and to meet the banking requirements of the local population in the country of operation. Bank of Baroda has thus transformed into India's International Bank.

Bank of Baroda has significant international presence with a network of 84 branches/ offices in 26 countries including 52 branches/offices of the Bank, 28 branches of its 8 Subsidiaries and 3 Representative Offices in Malaysia, Thailand & Australia. The Bank also has a Joint Venture in Zambia with 12 branches.

The Bank has presence in world's major financial centers i.e. New York, London, Brussels, Dubai, Hong Kong and Singapore.

## Bank of Baroda in the USA

Bank of Baroda began its US operations in the year 1979 to focus on its international trade business and cater to the growing Indo-US trade. The New York branch is State Chartered and FDIC insured since 1980.

The New York branch of Bank of Baroda offers a wide range of products and services which includes Demand Deposit checking accounts for businesses and certificate of deposits for business and individuals. The branch extends business, service and industry loans, offers foreign currency loans to Indian Corporate and participates in global syndication loans. The branch handles business related to indo-us trade / projects.

The trade related services include supplier's credit for exporters and buyer's credit for importers, handling documentary collection and fund transfers. It offers a wide range of trade finance activities such as issuing, advising, confirming, negotiating and discounting of Letters of Credit, issuance of Stand By Letters of Credit etc.

The branch offers remittance facilities at competitive rates. The branch also provides NRI services, fund transfer and forex services etc.

Currently the business of the branch has an asset base of US \$ 2.374 billion and employs 38 personnel.

## Community Involvement

Because of the wholesale nature and specialized business focus, the New York branch of Bank of Baroda traditionally has not had extensive contact with members of the general public. The branch therefore has been maintaining close association with non-profit community institutions as also efficacious intermediaries like Neighborhood Housing Services of New York City (NHS), Carver Federal Savings Bank (CFSB) and other Community Development Financial Institutions which develop housing for LMI families, promote job creation through small business lending and support businesses that provide beneficial products of services to their local communities. The Bank is also associated with Bharatiya Vidya Bhavan who is actively engaged in social, cultural, educational, community services.

The New York branch of Bank of Baroda also contributes regularly to worthy causes such as



Citymeals on Wheels, the NY State Association of Chiefs of Police, Firefighters of New York City etc.

### Success Factors

Bank of Baroda has 3,294 branches in India and has achieved 100 per cent Core Banking Solution for all its domestic branches. This provides a great opportunity to Indian expatriates residing in the USA to perform banking and financial transactions between the USA and India. The bank is also connected to 84 other locations in 26 countries. Bank of Baroda is supported by a robust information technology backbone that supports Internet banking and related services. It also utilizes processes that use modern software applications.

### Future Plans

The bank sees opportunities in trade finance, syndication of loans, Indian companies setting up joint ventures, mergers and acquisitions and the large buyer's credit market and is focusing on the international front to increase its business.

At Bank of Baroda, change is a journey. It has a beginning. There will be no end. It will be a long and difficult march. And the Bank will emerge stronger, more resilient and positioned to become India's first bank of truly global standards. As it stands on the threshold of a digital era, it will not be out of place to echo the same sentiments that guided the Bank in its platinum jubilee year - 'a promising future is the sequel to a glorious past'.



**Birlasoft, Inc.**

## Company Background

Founded in 1995, Birlasoft is a Global IT Services provider and part of the 150 year old, multi-billion dollar CK Birla Group. With a global workforce of over 4500 employees, Birlasoft has a footprint in 5 continents & best-in-class delivery centers India, China & USA.

Birlasoft is counted amongst the leading global Information Technology Services providers. The company has remained focused on continuous innovation, benchmarking & learning. In addition, as part of the company's corporate heritage and philosophy, Birlasoft believes in creating 'Value for All' and in sustainable commitment through community engagement, which includes active employee engagement supporting 'United Way' as well as many orphanages.

Birlasoft adds value to clients in the Banking & Financial Services, Insurance and Manufacturing industry and enables them to become competitive in their business by providing value based information technology services, in onshore, offshore and near-shore models. Birlasoft goes that extra step to understand the trends and patterns in customers' business landscapes to proactively align its consulting and outsourcing services with the customers' business goals.

The portfolio of services offered by Birlasoft include application development

& management, testing, enterprise resource planning (ERP - SAP, Oracle, PeopleSoft), business intelligence data-warehousing solutions, customer relationship management (CRM - Siebel), enterprise & IT asset management (EAM, ITAM – IBM), portfolio management (PPM – HP), process consulting and managed infrastructure services. The company's robust delivery processes embrace digitized project management methodologies, embedded within proven practices of Six Sigma, SEI CMMI Level 5 on Continuous Representation and a secure services framework. However, its strongest capabilities lie in successfully adapting to changing trends and challenges.

Birlasoft deploys a host of innovative solutions and service architectures across the global Banking & Financial Services, Insurance and Manufacturing industries.

## Global Footprint of Birlasoft

Birlasoft is headquartered at Noida, India, and has over 4,500 employees with more than 800 employees deployed outside India. The company provides IT-enabled solutions to customers in USA, Europe, India, Singapore, and Australia. Its strategic alliances with leading IT companies such as SAP, Oracle, Siebel, HP, and IBM augment its capabilities. With the help of these alliances and through adequate support from its development centers in India and Australia, the company provides technology-enabled solutions to its clients globally.

## Birlasoft in the USA

### Mode of Operation

The company operates in the USA through its sales and marketing offices and more than 500 consultants working out of various locations spread over almost forty states.

## Overview

Birlasoft established its operations in the USA in 1995. The company gained in importance through vital support from the world's two largest industrial conglomerates - General Electric and

C.K Birla Group. The company has witnessed rapid growth through investments in specific industry verticals and the technology domain. It has developed a strong pool of highly qualified and skilled professionals who are engaged in executing software development projects across the globe.

Some of its USA clients include manufacturing companies like GE, Juniper, Cadence, Johnson Controls, Novartis, Xerox; insurance companies like MetLife, SwissRe, Genworth, Harleysville insurance, Philadelphia insurance; and banking & financial services companies like DTCC, Citibank, Credit Suisse, Morgan Stanley. It offers cost effective, high quality, and commercially viable software services and solutions, which add value to its clients' businesses. The company has over 500 professionals at various locations in the US. It generated US\$ 140 million in revenues in FY 2010.

## Success Factors

### Customer Satisfaction

Birlasoft has been very active in providing quality services to its clients, which impact their business processes. Quality service has led to successful projects creating good customer satisfaction, due to which a large part of its business comes from repeat clients.

## Domain and Technology Practices

Birlasoft has invested to build strong domain and technology practices. The practice teams bring thought leadership and innovative solutions to business problems. There are three domain practices



namely in banking & financial services, insurance, and manufacturing industry verticals.

## Strong Sales and Delivery Team

Birlasoft has a dedicated industry vertical focused sales team in USA, supported by delivery team based in USA, India and China. Birlasoft through its thought leadership in certain business solutions is able to engage with new customers and aggressively grow the business they do with the customer by increasing the value added. The sales and delivery teams' work together to deliver technologically advanced business solutions in a timely manner.

## Global Alliances

Birlasoft has been actively involved in forging alliances with global majors. It has collaborated with many large companies such as Oracle, SAP, IBM, HP, etc. These alliances have assisted the company in gaining access to new technology and enhancing its service portfolio.

## Future Plans

### Customer Value Add

Birlasoft plans to innovate and deepen its service offerings to increase the value it adds to its customers. The company plans to increase its domain expertise in the banking & financial services, insurance and manufacturing segment by hiring specialists and developing process competency to innovate new and existing service offerings. The company also

plans to increase the share of repeat business in its total business by providing innovative solutions that efficiently improve their processes.

## Rural Outsourcing

Birlasoft is in advanced stages of opening Software delivery centers in Rural America to leverage local talent and contribute to job recovery in rural areas.

## Strategic Acquisitions

Birlasoft plans to develop a better market reach in the US. It has identified both the organic and inorganic routes to fuel its growth in the US market. The company plans to undertake acquisitions in a related services domain to develop strong domain expertise and cater to the increasing requirements of its clients.



Birlasoft Headquarters, Edison, New Jersey



## Dr.Reddy's Laboratories Ltd.

### Company Background

Dr. Reddy's Laboratories Ltd. (NYSE: RDY) is an integrated global pharmaceutical company, committed to providing affordable and innovative medicines for healthier lives. Through its three businesses - Pharmaceutical Services and Active Ingredients, Global Generics and Proprietary Products – Dr. Reddy's offers a portfolio of products and services including APIs, custom pharmaceutical services, generics, biosimilars, differentiated formulations and NCEs. Therapeutic focus is on gastro-intestinal, cardiovascular, diabetology, oncology, pain management, anti-infective and pediatrics.

The company's Global Generics business helps reduce drug costs by bringing generic drugs to market as early as possible – directly or through partnerships, and making them available to as many patients as possible. They market both generic small-molecule drugs and generic biopharmaceuticals. In markets with guidelines for approval, its Biologics business offers more affordable and equally effective generic biopharmaceuticals/biosimilars.

The Active Pharmaceutical Ingredient (API) business of Dr. Reddy's supplies pharmaceutical ingredients to other generic companies, which contributes to the goal of providing affordable medicine. Through its Custom Pharmaceutical Services (CPS) business it helps innovator companies get their proprietary medicines to patients faster, by providing a range of technology platforms and services.





Dr.Reddy's Office, Bridgewater, New Jersey

The Proprietary Products business of Dr. Reddy's addresses unmet medical needs, by developing and bringing to market new drugs. Focus is on research in the therapeutic areas of pain, anti-bacterials and metabolic disorders.

## Global Footprint of Dr.Reddy's Labs

Headquartered in the India and with key operations in the US, UK, Germany and Russia & CIS, Dr. Reddy's is a leader in the global generics market. In 2009 the company announced a partnership with GlaxoSmithKline plc (GSK) to develop and market more than 100 branded pharmaceuticals in fast growing therapeutic segments such as cardiovascular, diabetes, oncology, gastroenterology and pain management across emerging markets outside India. Dr. Reddy's is listed on stock exchanges including the NYSE and has investors, customers, business associates and employees across the globe. Other major markets include Venezuela, South Africa, Romania, and New Zealand.

The company's infrastructure spans across India, Europe and North and Central America.

Dr. Reddy's has 16 manufacturing facilities including Eight API Manufacturing units (Six FDA-approved plants In India; One FDA-approved plant in Cuernavaca, Mexico; One FDA-approved plant in Mirfield UK) and eight Finished Dosage units (Six: Formulation plants

in India [One FDA-approved] and two FDA-approved plants in USA). The company also has one biologics development center in Hyderabad, India and three Technology Development Centers (TDC) (Two in India; One in Cambridge, UK). In addition, Dr.Reddy's has three R&D centers, including one Integrated Product Development facility in Hyderabad, India and two NCE R&D centers (In Hyderabad & Bangalore, India)

## Dr.Reddy's Labs in the USA

### North America

Established in 2001, Dr. Reddy's North American Generics business began marketing its finished dosage-form products in the United States and Canada. Under the Dr. Reddy's label, the company currently markets 45 prescription products in 168 dosing presentations (ie. strengths and package sizes). In addition, Dr. Reddy's Private Label OTC Group, which was established in 2007, markets eight different products in 139 packaging presentations. Dr. Reddy's consistently has an aggressive product pipeline — with many products under development and awaiting FDA approval. Dr. Reddy's North American Generics is also positioned uniquely to support Rx-to-OTC switches through its OTC group.

Dr. Reddy's North American Generics is vertically integrated — from process development of Active Pharmaceutical Ingredients (APIs), to formulations and the submissions of ANDAs, manufacturing of finished dosages, operations/marketing/sales/customer service — to ensure that its products reach customers on time. Dr. Reddy's plans to expand its manufacturing capabilities and has announced plans of future expansion of the company's manufacturing facility in Shreveport, Louisiana. The company also plans to expand into additional dosage forms, including injectables, liquids, and biological, as well as topicals.

Dr. Reddy's strives consistently to be the "first choice" for its customers by leveraging the company's vertical integration — from the process development of APIs to finished dosage forms. In addition to North America

Generics, other divisions based out of Bridgewater, NJ are the US Sales division of PSAI, portfolio strategy and licensing division of Biologics, the Promius Pharma specialty branded dermatology subsidiary, corporate development and strategic marketing functions and the drug development divisions of NCE/Differentiated Formulations.

### Success Factors

**Deep Manufacturing Expertise** -The company's eight formulation manufacturing facilities are designed to respond to a wide range of technologies - oral solids, injectibles, topicals, inhalers, cytotoxic, hormonal and other dosage forms. Likewise its API facilities offer lean manufacturing, adhere to stringent regulatory guidelines and continually drive cost competitiveness. Such manufacturing capabilities and an inherent expertise to navigate intellectual property road blocks makes Dr. Reddy's a preferred partner for some of the world's leading pharmaceutical companies.

**Globally Synchronized Supply Chain** - Its globally synchronized supply chain and a comprehensive information technology platform helps assure customers of timely delivery and superior inventory turns. The uninterrupted success of customers' business is its promise.

**Regulatory Performance** - Over the years Dr. Reddy's has built an expertise in understanding the regulatory frameworks of the various countries in which it operates. The company has built a successful track record of timely and extensive approvals. Today it is among the leaders in terms of DMF and ANDA filings

in the US itself, with more than half of these being Para IV possibilities.

**Quality & Product Responsibility** - At Dr. Reddy's, product responsibility extends through the life cycle of the product -- from product development to manufacturing to product release to post-launch. We comply with the internationally accepted International Conference on Harmonization (ICH) guidelines in product development and we have independent quality control and quality assurance teams to ensure multi-stage quality compliance.

### Future Plans

The company aims to build leadership position in its Global Generics and Pharmaceutical Services & Active Ingredients business while creating levers of growth for future through its Proprietary Products business. In Global Generics, Dr. Reddy's is working to improve depth in its key markets through portfolio expansion, supply chain excellence and ensuring consistent delivery of limited competition opportunities. Through the GSK alliance, Dr. Reddy's is working on realizing its strengths in technology, product development and manufacturing to provide medicines to a much wider population across a range of high growth emerging markets. Its Pharmaceutical Services & Active Ingredients business aims to create compelling value for its customers by leveraging IP, technology and cost leadership. The company is calibrating investments in Proprietary Products and other high risk R&D with overall intent to accelerate path to financial sustainability.



Dr.Reddy's Manufacturing Facility, Shreveport, Los Angeles





## Essar Americas

### Company Background

The Essar Group is a multinational conglomerate and a leading player in the sectors of steel, oil & gas, power, communications, shipping, ports & logistics, projects and minerals. With operations in more than 20 countries across five continents, the group employs 70,000 people, with revenues of USD 15 billion.

Today, the Group continues to expand its global footprint, focusing on markets in Asia, Africa, Europe, the Americas and Australia. Essar invests significantly in the latest technology to drive forward and backward integration in its businesses, and on leveraging synergies between these businesses.

### Steel Business

- A global steel producer with 14 million tons per annum of current capacity, with an aim to achieve a global capacity of 20-25 million tons.
- Presence in key markets in Asia and North America.
- Strong downstream capability with service centers and a global network of retail outlets branded Essar Hypermarket.



## Oil and Gas Business

- A fully integrated oil & gas company of international scale with strong presence across the hydrocarbon value chain from exploration & production to oil retail.
- Over 300,000 bpsd (barrels per stream day) of crude refining capacity that is being expanded to 405,000 bpsd.
- Global portfolio of onshore and offshore oil & gas blocks, with about 45,000 sq km available for exploration.
- Largest coal bed methane (CBM) player in India.

## Power Business

- Current generation capacity of 1,600 MW that is being expanded to 6,100 MW by 2012, and to 11,470 MW by 2014.
- Growing portfolio of gas, coal and liquid fuel-based power plants.
- One of the lowest cost power producers.

## Communication Business

- A global player in the communications sector with presence in telecom services, CDIT and Business Process Outsourcing services.
- Telecom services in India and Africa with over 120 million subscribers.

- India's largest telecom retail network, with over 1,200 outlets.
- Business Process Outsourcing services, employing over 50,000 people.

## Shipping, Ports and Logistics Business

- An integrated logistics solution provider with presence in sea transportation, ports, logistics and oilfield services.
- One of India's largest operator of ports.
- Fleet of 27 vessels, with an additional 12 new ships on order.

## Project Business

- Forty years of engineering, procurement & construction (EPC) capabilities.
- One of the largest, most diverse and fastest growing EPC companies.
- Dedicated Engineering Centers specializing in Process, Engineering and Design for the Hydrocarbons and Industrial sectors, with over 1,200 engineers.
- Global procurement support in Middle East, Europe and China and excellent vendor relationships.

## Minerals Business

- A growing business within the mining and minerals space.



- Iron ore and coal mines in Asia, Africa and North America.
- Major focus on iron ore, coal (thermal and metallurgical) and limestone required for the steel and power sectors.
- Potential to set up large-scale mining operations to secure captive needs and for merchant sale

Overall the above business verticals lead to a vast breadth of operations across the globe.

### Essar Group in the Americas

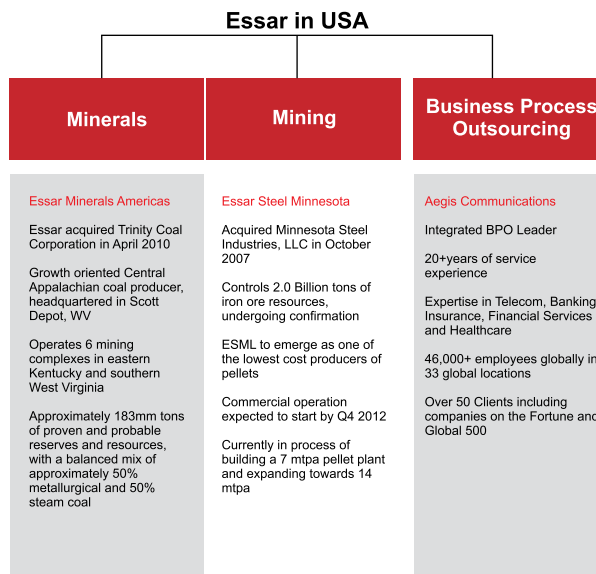
	US	Canada	North America
<b>Investment</b>	\$ 2.5 bn	\$ 2.2 bn	\$ 4.7 bn
<b>Employees</b>	8,000	3,500	11,500
<b>Locations</b>	19 Location in 9 states	Ontario	
<b>Sectors</b>	Iron Ore, Coal and BPO	Energy, Steel	

In 2003, Essar established its footprint in the US. Today, it has invested over USD 4.5Billion in its various operations spanning North America and has employee strength of over 11,500.

Following the first US acquisitions of E-Telequest and Aegis Communications in Texas in 2003 (that now forms part of Aegis Communications), Essar has continued to reinvent and establish itself as one of the leading Indian companies investing in North America. Essar expanded its North American presence in to core sectors such as steel and iron ore by acquiring

a 4MTPA steel company in Canada (Algoma Steel Inc based in Sault Ste Marie, Ontario) and a 2bn ton iron-ore resources company in the US (Essar Steel Minnesota LLC based in Nashwauk, Minnesota) in 2007.

Continuing with its strategy to build a vertically integrated operation with iron ore and coal reserves, Essar acquired Trinity Coal Corporation (now Essar Minerals North America) in early 2010. Essar’s mining operations tie in closely in to its steel manufacturing operations, providing a secured and stable resource base much desired in a cyclical commodity price environment for steel. It has also entered the power sector in the Americas, with Essar Power, a byproduct based, fuel fired industrial co-generation facility at Algoma’s steel plan at Sault Ste Marie, Ontario



## Essar Group in the USA

Essar has its regional headquarters in New York, NY while its operations are located in several locations in the US.

### Essar Minerals North Americas

#### Mode of Operation

Essar Minerals North America is a \$600mm investment in Trinity Coal Corporation in West Virginia. Its operations include 6 mining complexes in eastern Kentucky and southern West Virginia.

It has a fully integrated growth platform with robust coal production, preparation and transportation infrastructure. There are approximately 700 Americans employed by Essar Minerals.

#### Overview

Essar Minerals controls high quality proven and probable coal reserves which it sells to steel manufacturers and power utilities. While historically a steam coal producer, Essar Minerals is transitioning into a rising met coal player. Met coal and Steam coal production is being ramped up to leverage improved demand situation.

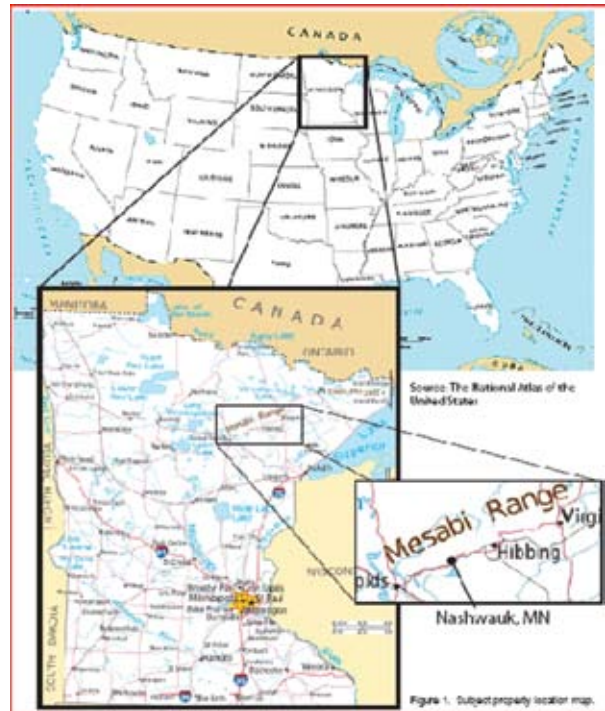
Essar Mineral follows a disciplined mine planning and execution strategy. It has a highly efficient surface mining model using mining and other ancillary equipment to gain from a highly skilled and experienced labor force and management team.

### Essar Steel Minnesota LLC

#### Mode of Operation

Essar is currently investing \$1.3 billion in Minnesota, by far the largest Greenfield project development ever undertaken by any Indian Corporation within United States. Essar has further plans to increase the total investment in building this manufacturing base to over \$ 2 Billion by 2014.

Essar Steel Minnesota Limited (ESML) will start its



operations in the following phases:

- CY2011: Production of 1 million tons of concentrate/sinter feed
- CY2012: Completion of Phase II for 7 mtpa pellet production capacity
- CY2014: Completion of Phase III for additional 7 mtpa pellet production capacity

#### Overview

Essar Steel Minnesota controls over 2 billion tons of Iron Ore resources. Over the next two years, the Greenfield investment will engage about 2,000 construction workers and upon commissioning about 300 + full time jobs will be created in Nashwaak, MN.

### Aegis Communications

#### Mode of Operation

Aegis is an integrated BPO leader in interaction, back-office and value added services. It has 20+ years expertise in telecom, banking, insurance, financial





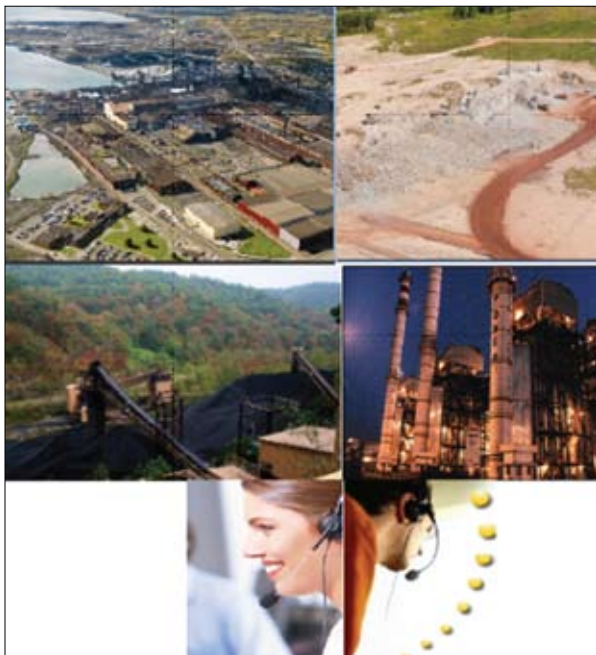
services and healthcare sectors. Aegis is a Tier One contact center company which has been rated in the Top 25 contact center companies of the world (Source: Datamonitor). It serves over 50 clients including companies on the Fortune and Global 500.

### Overview

Aegis is a first mover investment by Essar in the onshore IT-BPO operations in multiple locations in the United States. Aegis serves 120 Million+ inbound contacts, 78 Million+ outbound contacts and 30 Million+ interactive contacts annually. There are over 5,500 Americans employed by Essar Aegis in 10 different locations.

### Success Factors

Essar is a financially and operationally strong conglomerate with proven execution experience. In the USA, it has a world class asset base in coal and iron-ore in a scarce resource environment. It has



positioned itself to be a low cost producer driven by strategic location and efficient mining methods. By virtue of its manufacturing base and investment plans, it has committed itself to be a long term player in the core manufacturing sector in the US. The assets are poised for growth given their strategic advantages that has been optimized by the experienced operating management teams with prior senior roles in leading coal and steel companies.

Alongside its ambitious business pursuits, Essar has been committed to its social responsibility. The Group runs community outreach initiatives in all its plant locations, with a focus on education, healthcare, environmental and agricultural development, and self-employment. Essar is committed to sustainable business practices. Our HSE (Health, Safety and Environment) management system is on par with global standards. We are also taking climate change initiatives to reduce our carbon footprint. This includes several CDM (Clean Development Mechanism) projects that can earn the company CER (Certified Emission Reduction) credits. A growing number of our businesses—with new businesses joining the list every year—are certified to international environment standards, like ISO 9001 /14001, and health and safety standards, like OHSAS 18001.

### Future Plans

Essar continues to invest in broad sectors including Mining, Metals and IT-BPO. It has significant growth plans in each of the areas discussed above including:

Essar Minerals: increase coal production to serve Steel and Power Utility companies

Essar Steel Minnesota: To build and operate a greenfield iron-ore pellet facility to serve Steel Manufactures.



## Export-Import Bank of India

### Background

The Export-Import Bank of India is India's national Export Finance Institution, fully owned by the Government of India. The Bank is engaged in financing, facilitating and promoting India's two-way international trade and investment, and seeks to enhance the international competitiveness of Indian enterprises.

Recognizing the dynamics of international trade, Exim Bank of India's vision has evolved beyond providing vanilla export credit to a conscious, systematic effort at creating international competitiveness capabilities by arranging competitive finance and services at all stages of the business cycle.

Today, in its 29th year of operations, Exim Bank of India proactively seeks to enhance the competitive edge of Indian companies in their internationalization efforts through a range of financing programmes and advisory and support services. Financing of R&D activities of exporting companies, term finance along with equity participation in Indian ventures overseas, support to rural and grass-root enterprises, support for agri-business, finance for services sector, are some of the Bank's key initiatives in this direction.



## Financing

The Bank promotes international competitiveness of Indian companies, with particular focus on small and medium enterprises, through a range of programmes at all stages of the business cycle: Import of Technology, Export Product Development, Export Production, Export Marketing, Pre-shipment, Post-shipment and Investment Abroad. The Bank also facilitates two-way technology transfer by financing import of technology into India and investment abroad by Indian companies for setting up joint ventures / subsidiaries.

## Advisory Services

In addition to finance, Exim Bank of India provides a range of analytical information and related services necessary for globalization of Indian companies. The advisory services enable exporters to evaluate international risks, export opportunities and enhance competitiveness. The Bank undertakes customized research on various areas such as establishing market potential, defining marketing arrangements and specifying distribution channels. The Bank helps to develop export market entry plans, achieve international quality certifications, and provides export marketing services. The Bank's relationships with numerous trade and investment promotion agencies and access to several databases deliver valuable insights on products and markets. Exim Bank also offers Joint Venture facilitation and identification services as well as Loan Syndication services.

## Project Exports / Lines of Credit

Exim Bank of India has been the prime mover in encouraging project exports from India in a focused manner. Currently, over 255 project export contracts worth US\$ 22.08 bn are under execution in over 42 countries across Asia, Africa and Europe, with Exim Bank of India's support. The Bank extends Lines of Credit (LOCs) to overseas financial institutions, foreign governments and their agencies, enabling them to onlend term loans to finance imports of eligible goods

from India. Exim Bank of India now has in place over 135 LOCs covering more than 71 countries with credit commitments of over US\$ 6.58 bn.

## Facilitating Overseas Investment by Indian Companies

The Bank, in order to help Indian companies in their internationalization efforts, provides a comprehensive programme covering equity finance, term loans, guarantees as also advisory services. Besides, Exim Bank of India also takes direct equity stake in Indian ventures abroad, to enable Indian companies to supplement their equity with the Bank's equity contribution.

With India increasingly emerging as a global investor in recent years, Exim Bank of India's focus in this direction is evident from the fact that several corporates have been supported for their overseas investments in diverse sectors covering different markets including USA, UK, EU countries, Australia, China, Romania, Thailand and Singapore.

Exim Bank of India has, over the years, supported over 259 overseas ventures by more than 209 Indian companies in over 64 countries in a wide range of sectors, including engineering goods, metal & metal processing, pharmaceuticals, chemicals & dyes, computer software & IT and agriculture & agro-based products.

## Global Footprint of Exim Bank of India

Exim Bank of India has consciously sought to create a network of alliances with multilateral agencies, export credit agencies, development banks, and trade and investment promotion bodies to create an enabling environment for economic cooperation.

The Bank's Head Office is in Mumbai. It has ten Regional offices in India and seven offices overseas in Dubai, Johannesburg, Dakar (Senegal), Addis Ababa (Ethopia), London, Singapore and Washington D.C.

## Exim Bank of India in the USA

Exim Bank of India has a representative office in Washington, D.C. since 1985 and the activities of the office include:

- Interaction with international banks; multilateral institutions such as the World Bank, International Finance Corporation, Multilateral Investment Guarantee Agency, International Monetary Fund; export credit agencies such as Export-Import Bank of the United States, other US Government agencies, industry associations as well as U.S. based corporations;
- Advising and helping structure financial support for Indian companies setting up joint ventures/subsidiaries in the United States and other countries in the Americas (North, Central, South America and the Caribbean);
- Advising and assisting Indian companies seeking to secure procurement business in World Bank financed projects;
- Assisting Indian exporters and importers in forming business relationships with entities in the United States and other countries in the Americas; and
- Identifying, appraising and negotiating with banks in the Americas for extending Lines of Credit to

enhance trade between India and North and South America and the Caribbean.

In the US, some recent examples of overseas investments / projects by Indian companies that have been facilitated by the Bank include:

- Provided a term loan to Welspun Pipes Inc., USA;
- Facilitated Glodyne Technoserve Inc.'s acquisition of Decision One;
- Finance to KEC Transmission LLC. Delaware, USA and KEC US LLC. Delaware, USA to acquire SAE Towers with operations in US, Brazil and Mexico;
- Finance to Plethico Pharmaceutical Ltd. to acquire Natrol Inc., a US-based pharma company;
- Provision of a long-term working capital loan to Tiger American Minerals Inc.;
- Finance to Surya Pharmaceutical Ltd. to acquire Amershire Inc. & Family First Pharmaceuticals.

The U.S. forms one of the most important markets for Indian companies. Being the leading economy of the world, it offers tremendous potential to Indian companies for expanding their business. Exim Bank of India offers a wide range of financial and advisory services to Indian companies to facilitate bilateral trade and investment between India and the U.S.





# HCL

## HCL America, Inc.

### Company Background

The product of a vision founded in a small garage in 1976, HCL is a \$5.7 billion global technology enterprise and a name to reckon with in the industry. The passion of its founder and the entrepreneurial zeal of its employees have made its software services arm, HCL Technologies, a leading provider of business transformation, enterprise & custom applications, infrastructure management, business process outsourcing, and engineering services. HCL delivers solutions across a wide range of verticals like Financial Services, Manufacturing, Consumer Services, Public Services and Healthcare. Its global delivery model is spread across 29 countries around the globe.

HCL has successfully tripled revenues and income in the last 5 years, doubled its market cap and increased customer satisfaction by nearly 73%.

Today, HCL is proud to be on Business Week's '5 most influential companies to watch' list; It is considered 'disruptive' by IDC; ranked in the top 10 outsourcers with the 'highest accountability, transparency and trust' by Wall Street Journal; featured as a case study in Harvard, London Business School, Darden Business Publishing, and more recently, David G Thomson's book, "Blueprint to a billion - 7 essentials to exponential growth"; has been included in Forbes' prestigious 'Asia's Fab 50 List' for 2010; recognized by WorldBlu as one of the 44 Most Democratic Workplaces in the world and acknowledged by Fortune as the world's most modern management.



HCL Delivery Center, Raleigh, North Carolina



HCL Office, Cary, North Carolina

## Global Footprint of HCL

HCL Technologies has significant global presence, leveraging an extensive offshore infrastructure and a global network of offices in 29 countries across the globe, primarily in the USA, Europe, and APAC/MEA.

In Europe, HCL has centers in Belgium, Czech Republic, Finland, France, Germany, Italy, Netherlands, Poland, Sweden, Switzerland, and the UK. In Asia, HCL has centers in China, Hong Kong, India, Israel, Japan, Malaysia, Saudi Arabia, Singapore, UAE, Qatar, and Indonesia. HCL has an office in South Africa. In the Americas, HCL has centers in Brazil, Puerto Rico, USA, and Mexico, and in the ANZ region – centers in Australia and New Zealand.

## HCL in the USA

HCL America was established in 1989 and is headquartered in Sunnyvale, California. With more than 5,000 people in 21 offices across 15 states, HCL America contributed 58.9% of HCL's total worldwide Consulting and IT Services revenues during the quarter ended December 2010.

Continuing its long-standing commitment to growing US operations, HCL opened a delivery center in Wake County, North Carolina over a year back. The company has invested \$3.2 million and the delivery center has a capacity for 500 personnel. Last year it

also inaugurated a data center in Parsippany, New Jersey.

HCL leverages decades of global consulting and IT services expertise to create strong, long lasting relationships with its diverse group of Fortune 1000 customers across the Aerospace & Automotive, Energy & Utilities, Financial Services (Banking, Capital Markets and Insurance), Government, Hi-Tech & Manufacturing, Life Sciences & Healthcare, Media & Entertainment, Retail & CPG and Telecommunication industries.

A radical assessment of the market in 2005 led to a massive internal transformation at HCL and based on customer insights, the company established Services+ portfolios that span the abovementioned vertical industries. These portfolios include:

- IT Transformation: APO, SOA & Middleware, ERP, ADM, Legacy, Web Technologies, Content Management, and Independent Verification & Validation
- Operations Transformation: Applications/ ERP Maintenance and Operations, Infrastructure Management & Operations, and BPO
- Technology Transformation: Software Engineering, Systems Engineering, Mechanical Engineering, and Software as a Service (SaaS)



## Community Involvement

Adopt-A-Family is an annual program organized by HCLA Community Service Council, created to address the needs of low-income households -children and families during the Christmas & holiday season. HCL has also rolled out the Adopt-A-Family program in New Jersey & Bay Area, HCL Community Service Council is partnering with leading agencies in New Jersey & the Bay Area to bring the joy of the holiday season into the homes of families in need.

## Success Factors

With a focus on 'value centricity', HCL pioneered the management concept of 'Employees First, Customers Second', empowering its employees to better serve its customers through fresh and innovative approaches. One of the program's initiatives was the addition of graduates from top U.S. schools such as the University of Michigan, Northwestern, NYU, Notre Dame and Duke, as well as through customer engagements designed to overcome cultural and business nuances. Other concepts such as transformational engagements, outcome-based-pricing and multi-service delivery also became the cornerstone of HCL's strategy.

HCL's innovative thinking and management style raised the company's profile in the U.S. and also made it the subject for classroom discussion, following the publication of a case study on HCL by Harvard Business

School in 2007. The HBS case study focuses on HCL's transformation that started in 2005, highlighting its 'Employees First Customers Second' strategy (read more on [www.hbsp.harvard.edu](http://www.hbsp.harvard.edu)).

## Future Plans

While most companies are competing to be bigger or better, HCL is competing to be different especially in the area of creating more value for customers. HCL's key areas of investment continue to be in Value Aligned Services, Business Aligned Services, moving from mere satisfaction to happiness through the introduction of the Transformation Board, Customer Advisory Council, Global Customer Meet, and Value Portal initiatives, moving towards localization in all geographies [where in the next 2 years no geo will have less than 50% locals], creating talent advantage where HCL continues to focus on employees' betterment, and backing the reincarnate CIO where HCL has created Eco System Business Incubation – an entrepreneur team that experiments with new ideas on apps, data, and infrastructure; the Enterprise Transformation Services group which is looking at SOA and BI led transformation, and the Engineering and R&D Services group which offers Engineering out of the Box as the new service available to CIOs.

In developing its future plans, HCL is keenly studying several areas that include the role of technology in business transformation - HCL is studying about the latest disruptive technologies or forces that could make some businesses obsolete. HCL is studying the impact of emerging markets such as China, Vietnam and India on its customers' businesses and on IT. HCL is studying the role of the 'new influencers' today such as Governments, Unions and the Press, and how they influence buying decisions. Gen Y and gender equality in the talent pool is a completely new opportunity and challenge where HCL is striving to get the most results, making this a competitor differentiator. And finally, Innovation – though HCL is structured to deliver innovation, it is determining how best to deliver innovation at India cost, and also how to institutionalize it.



## ICICI Bank Ltd.

### Company Background

ICICI Bank is India's second-largest bank with total assets of US\$ 81 billion at March 31, 2010 and profit after tax US\$ 896 million for the year ended March 31, 2010. The Bank has a network of 2,528 branches and over 6,000 ATMs in India, and has a presence in 19 countries, including India.

ICICI Bank offers a wide range of banking products and financial services to corporate and retail customers through a variety of delivery channels and through its specialized subsidiaries in the areas of investment banking, life and non-life insurance, venture capital and asset management.

ICICI Bank's equity shares are listed in India on Bombay Stock Exchange and the National Stock Exchange of India Limited and its American Depositary Receipts (ADRs) are listed on the New York Stock Exchange (IBN)

### Global Footprint of ICICI Bank

The Bank currently has subsidiaries in the United Kingdom, Russia and Canada, branches in United States, Singapore, Bahrain, Hong Kong, Sri Lanka, Qatar and Dubai International Finance Centre and representative offices in United Arab Emirates, China, South Africa, Bangladesh, Thailand, Malaysia and Indonesia. Our UK subsidiary has established branches in Belgium and Germany.



## ICICI Bank in the USA

ICICI Bank Limited has a branch in New York City. The New York Branch is a foreign bank branch licensed by the Office of the Comptroller of the currency. Deposits accepted by the branch are not FDIC insured.

The New York Branch is dedicated to serve the banking needs of corporates – both Indian and American – for their cross border banking needs. For American companies expanding their presence into India or trading with companies in India, the New York branch has specialized banking products to support the export-import. Similarly, the Branch also serves subsidiaries of Indian companies located across United States. As the Indo-US bilateral trade continues to grow significantly, the New York Branch is focused on offering products and services to corporates in this segment.

## Success factors

ICICI Bank has a strong corporate banking franchise in India and has established relationships with many of the large and medium enterprises. The Bank gains a significant advantage by combining its in-depth expertise of the Indian business environment coupled with its global footprint across Asia, Europe, Middle East and America. In the last few years Indian companies have acquired companies outside of India or entered into various international joint ventures. ICICI has played a significant role in many deals by structuring and providing acquisition finance, working capital and trade finance for both Indian and US companies.

## Future Plans

ICICI Bank plans to increase its operations in the US market subject to regulatory clearance.



## Infosys Technologies Limited

### Company Background

Infosys defines, designs and delivers IT enabled business solutions that help deliver strategic differentiation and operational superiority for clients across the world. It pioneered a low-risk Global Delivery Model (GDM) to accelerate delivery with a high degree of time and cost predictability. In the fiscal ended March 31, 2010, it earned revenues worth US \$4803 million.

Incorporated in 1981, its service offerings span business and technology consulting, application services, systems integration, product engineering, custom development, maintenance, re-engineering, independent testing and services, IT infrastructure services and business process outsourcing. The company leverages its expertise in consulting, IT services and BPO to create solutions that are aligned both to the long term strategic and the immediate term operational priorities.

Infosys's vertical business domains include banking & capital markets, insurance, healthcare, life sciences, automotive, aerospace, transportation, resources, energy & utilities, hi-tech & discrete manufacturing, communication services providers, media & entertainment.

Infosys has eight subsidiaries globally - Infosys BPO Limited, Infosys Technologies (Australia) Pty. Limited, Infosys Technologies (China) Company Limited, Infosys Technologies S De RL De CV (Mexico), Infosys Technologies (Sweden) AB, Infosys Consulting Inc, Infosys Tecnologia DO Brasil, and Infosys Public Services Inc .





## Global Footprint of Infosys

The company's employee strength of 127,779 people (as on December 31, 2010) is globally spread in 75 major cities across 31 countries. Infosys was the first Indian company to be listed on the NASDAQ and the first Indian company to be included in the NASDAQ 100 composite index. The US market contributes the largest share to its revenues. China and Mexico are amongst the prominent new overseas locations.

The US constitutes the majority of the North America revenues, which is 65% of the total revenues, followed by Europe (22%), Rest of the World (11%) and India (2%).

## Infosys in the USA

### Overview

Infosys established its first sales office in the USA in 1987. Today, it employs approximately 14,000 professionals in various sales and marketing offices, development centers and client facilities across 17 locations in the USA: Atlanta, Bellevue, Bentonville, Bridgewater, Charlotte, Fremont, Hartford, Houston, Lake Forest, Lisle, Minneapolis, New York, Phoenix, Plano, Quincy, Reston and Southfield.



Infosys Office, Phoenix, Arizona

For the nine months ending December 31, 2010, the company generated revenues of US\$ 2.9 billion in the US market.

### Infosys Consulting Inc.

Infosys Consulting Inc. (ICI) was established in 2004 in Texas as a consulting subsidiary of Infosys. Headquartered in San Francisco (Fremont, California) it has branches in Boston, Dallas and Southern California. ICI focuses on customer operations, IT strategy, enterprise systems and product operations. It serves various Fortune 1000 and FTSE 500 clients in North America.

## Success Factors

### End-to-end solutions

Infosys complements its industry expertise with specialized support for clients. The company leverages the expertise of its various Centers of Excellence and the software engineering group and technology lab to create customized solutions for its clients. It continually evaluates and trains its employees in new technologies and methodologies. Finally, the company ensures the integrity of service delivery by utilizing a scalable and secure infrastructure.



Infosys Office, Plano, Texas



### Optimal cost global delivery model

Infosys has evolved its global delivery model (GDM) that integrates on-site and offshore technology capabilities. Its global delivery model translates into a powerful value proposition for its clients, which includes:

- Quicker, seamless transitions, and early ownership
- Optimum onsite/offshore mixes through intelligent allocation of resources
- High degree of predictability
- A strong relationship approach to ensure continuity and business-level focus
- Sharing of best practices and tools
- Depth and quality of resources, continuously retrained to suit project needs
- Adherence to SLA-based pricing models to ensure ROI and drive customer satisfaction

The company has frequently featured in the Leaders Quadrant for Gartner's Magic Quadrant, and for multiple service lines.

### Quality

Infosys benchmarks itself against international quality standards like ISO 9000, CMM and recently, the Malcolm Baldrige framework. It uses world-class techniques like the Six Sigma Cross Functional Process Mapping (CFPM) methodologies (from Motorola University) to facilitate process improvement.

A number of quality methodologies, tools and processes have been put in place to ensure superior quality products and services to Infosys clients.

### Relationship with clients

Over 95% of Infosys' revenues come from its existing clients – ample testimony to the strong and strategic relationships the company has built with its clients. As of December 31, 2010, it counted

among its clients 46 of the Fortune 100 and 149 of the Fortune 500 companies. Infosys has become a trusted transformation partner for its clients. Infosys has struck marketing and technology alliances with partners having best-in-class technologies in specific industries to develop business solutions for its clients.

### Investment in Talent and Infrastructure

Infosys has been investing in recruiting and training the best technology professionals and supporting them with best-in-class infrastructure. The Infosys Leadership Institute and the Global Education Center, a state-of-the-art training facility at Mysore, India, is one of the largest residential training centers in the world. The company engages with the best educational institutes globally in both the technology and management streams to leverage the best of talent across all our major markets. It has created a knowledge-networked work environment from where its employees provide high quality solutions to clients. The development centers use a multi-dimensional approach, planned to support growth and technology advancement, and ensure that the solutions for clients are built in the most productive and effective manner.

### Relationship building

Infosys has built meaningful relationships with clients, investors, analysts, media, academia and general society in the US. InStep, the global internship program, recruits around 70% of its summer interns from top schools like Stanford, Harvard, Wharton, University of Chicago, Smith College, MIT etc. The Infosys USA Foundation has provided lead funding for the New York City (NYC) Science Education Initiative of the New York Academy of Sciences (NYAS). The ACM-Infosys Foundation Award in the Computing Sciences recognizes the contributions of young scientists and system developers towards a contemporary innovation. The award carries a prize of US\$ 150,000 from the Infosys Foundation.



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## Future Plans

Infosys future plans are centered on the strategies and the action themes that will enable our rapid and symbiotic growth with our customers. Our value based differentiation focus necessitates the alignment of our service-mix with the focus areas for 'tomorrow's enterprise'. The company is investing in continued innovation and scaling, in services and solutions, the associated delivery models, pricing models and the support processes and systems, to ensure a continued

and higher relevance for our customers.

Over the medium term, the company plans to significantly expand its footprint in the space of 'Business Transformation' and 'Strategic Sourcing', and from 'New Engagement Models'. Infosys' aims at being the leading global sourcing services provider in the US market. The company plans to expand its service offerings in other important business sectors in the US market, and also expand on its local presence in the US, which is its biggest market.



## Infotech Enterprises America, Inc.

### Company Background

Founded in 1991, Infotech is a \$ 200 million (FY 2009-2010) Global Engineering Services Company with over 8000 people providing Engineering Services, Network and Content Engineering (N&CE) services. Infotech offers expert technology solutions to customers across diverse industries including Aerospace, Rail, Automotive, Energy, Marine, Plant Engineering, Consumer Electronics, Medical, Heavy Equipment, Semiconductor, Utilities, Telecom and Government.

Infotech has a distinctive business model: “Global Delivery and Collaborative Engineering”. Infotech is a recognized leader in providing efficient and sustainable solutions based on Global Collaborative Engineering - a proven strategy designed to lower engineering costs, leverage know-how for localization and accelerate R&D efforts. Clients range from large highly diversified engineering conglomerates to companies that are leaders in niche engineering.

Infotech’s cutting edge is its industry specific domain expertise, people and processes, technologies, tools and training. The company draws on this strong foundation to create measurable business impact for customers around the world, resulting in long-term relationships with several of the most recognized names in their respective industries. Infotech operate global ‘Centres of Excellence’ for leaders in the Aerospace, Rail, Telecommunications,



Infotech Center of Excellence in Paragould, Arkansas

Transportation and Government verticals.

Infotech Enterprises Limited, headquartered at Hyderabad, India, is listed in the Bombay Stock Exchange (BSE) and National Stock Exchange (NSE) and enjoys equity participation from several globally reputed investors.

**Engineering:** The Engineering vertical offers solutions to its customers in Aerospace, Automotive, Locomotives, Industrial and commercial products. The services offered include Engineering Design, embedded software, IT Solutions, manufacturing support and technical publications.

**Network and Content Engineering (N&CE):** The service offering under this vertical includes geospatial data services (data conversion services as well as Photogrammetry services), Digital Mapping and Geospatial Technology Services - implementation service on GIS (Geographical Information system) platforms, GIS software development and IT competencies.

## Global Footprint of Infotech Enterprises

Infotech Enterprises Limited operates from 30 global locations across 16 countries - Canada, USA, UK, Germany, France, Norway, Sweden, Denmark, Netherlands, Dubai, Singapore, Malaysia, Japan,

Australia and New Zealand - and accommodate the largest operations out of India for Engineering Services, and Network & Content Engineering (N&CE) services. The presence in the US is the largest accounting for 47.3 per cent of the total revenue followed by Europe 43.6 percent, APAC 9.1percent.

## Infotech Enterprises in the USA

Infotech Enterprises began its operations in the US in Riverside CA in the year 1999 as Infotech Software Solutions, Inc., a California company. The US entity now operates as Infotech Enterprises America Incorporated, a wholly owned subsidiary of Infotech Enterprises Limited. Over the last decade, Infotech in the US has steadily grown through organic and inorganic growth. Acquisitions include; VARGIS LLC, a geospatial service company in 2004, Time To Market, an embedded chip design company in 2008, Daxcon a heavy equipment engineering design company in 2010, and Wellsco, a telecom network design engineering company in 2010. Infotech now employs over 1,000 associate in the US and generates over \$100M in annual revenue. Infotech has delivery centers in East Hartford CT, Peoria IL, San Jose CA and Paragould AR, and sales offices in Sterling VA, Houston TX and Seattle, WA. Cumulative investments by Infotech into US operations total \$41 Million.

## Success Factors

Infotech has strong and long lasting strategic partnerships with its customers. A strong testimony to this is that over 80 percent of its revenues come





from its existing customers. As of December 31st, 2010, Infotech had more than 50 US clients including many among the Fortune 500 companies.

### Future Plans

To meet the evolving needs of Infotech's customers

as a strategic engineering partner, our plans for the future include – Strengthening domain expertise in our focus verticals, establishing a global network of engineering centers that offer our customers the right mix of proximity, skill and price and forging strategic long term relationships with large engineering companies.



## Jubilant Biosys Ltd.

### Company Background

Jubilant Biosys Limited is a part of Jubilant's Drug Discovery and Development Group. The Drug Discovery and Development Solutions (JDDDS) group within Jubilant constitutes 3 of its subsidiaries Jubilant Biosys, Chemsys and Clinsys Clinical Research. These are the majority-owned subsidiaries of Jubilant LifeSciences Ltd., a global pharmaceutical vertical engaged in collaborative research, development and manufacturing partnerships with global pharmaceutical companies. The DDDS group is integrated across therapeutic areas of Oncology, Metabolic Diseases, CNS and infectious diseases and collaborates with global pharmaceutical companies, biotechs and academia in lead generation, preclinical and clinical drug development across various target and technology disease platforms.

### Global Footprint of Jubilant Biosys

With over 1000 highly skilled and experienced scientific and medical personnel spread across Bangalore/Noida in India; Dusseldorf, Germany; Raleigh, North Carolina and Bedminster, New Jersey, the DDDS group leverages the capabilities in emerging markets for a global outcome, accelerating global drug development efforts.





Jubilant Clinsys, Raleigh, USA

## Jubilant in the USA

### Discovery Solutions

Recently, Jubilant has completed an important step in the realization of its long-term strategy to enhance its capabilities in prosecuting different target classes including Ion Channels, GPCRs and Kinases, by acquiring a full range of enabling platforms for enhanced discovery biology capabilities. This facility is located in the Eastern PA (Philadelphia) / New Jersey Pharma corridor and is fully enabled for comprehensive Discovery Biology in Voltage gated and ligand gated ion channel targets, GPCR targets and Kinase targets to meet the growing needs of Jubilant's collaborators in this space.

### Clinical Development Solutions

Headquartered in Bedminster, New Jersey and with

offices in Raleigh, North Carolina, as well as Dusseldorf, Germany and Noida, India, Jubilant's therapeutically aligned clinical development operations provide collaborators a seamless transition from preclinical through translational and early stage development. This is further augmented by Jubilant's ability to provide global access to late stage development (Phase II-IV) across Europe, USA and India.

Clinsys Research, the clinical research groups within DDDS, provides pharmaceutical, biotechnology and medical device companies with a broad range of clinical research services in support of Phase I-IV drug and device development, including project management, clinical monitoring, scientific and medical support, investigator and patient recruitment, site management, biostatistics, data management, EDC, drug safety, quality assurance, regulatory affairs, strategic sourcing and medical writing.





Highly efficient globally leveraged project management teams are supported by therapeutic experts in areas of dermatology, central nervous system, oncology, respiratory and cardiovascular providing collaborators with strategic and operational support from study design through regulatory approvals.

The Clinical Research group seamlessly integrates with customers or Jubilant's discovery and pre-clinical infrastructure to provide high quality and highly efficient translational and clinical development solutions.

Success Factors: Integrated Services Platform across Target Validation, Discovery, Preclinical and Clinical Development.

Drug Discovery and development at Jubilant is driven by the passion of its personnel to provide affordable drugs to the patients worldwide in areas of unmet needs. Jubilant scientists collaborate across technology and therapeutic platforms to identify and validate novel small molecules and platforms that will enable first or best in class healthcare efforts of our collaborators. High quality innovation is supported by a robust and highly efficient R&D process that makes Jubilant the preferred partner of many a global pharmaceutical and biotech companies.

Jubilant scientists bring decades of experience and talent in driving scientific innovation and efficiency to the R&D process. Jubilant's talent pool is a blend of PhD's, MD's and Masters, across various disciplines, and brings a wide range of experience from global pharmaceutical companies, biotech and academia. The team with global presence, works seamlessly across technology and therapeutic areas to drive innovation and projects for our collaborations. The scientific team is well supported by a team of experienced and trained project managers for successful execution. ISO27001 compliant processes enable a secure IT infrastructure for real time, transparent and secure communications with our collaborators.

State-of-the-art infrastructure and enabling technologies further augment Jubilant's philosophy of creative partnering and provides our collaborators optimal outcome in managing their functional and portfolio needs. The state-of-the-art technology platforms span across In Silico modeling, Protein Crystallography, High Throughput Screening and profiling technologies including in vivo screening technologies and parallel synthesis in the discovery area; and also extends to EDC platforms in Clinical development. Jubilant also partners with technology companies across the world in enabling cutting edge discovery and development efforts.



Jubilant Facility, Hollister Stier, Spokane, USA



Inside the Jubilant Facility, Hollister Stier, Spokane, USA



## Larsen and Toubro Ltd.

### Company Background

Larsen & Toubro (L&T) is a technology driven global conglomerate headquartered in Mumbai, India, that operates in more than 60 diverse businesses representing Engineering & Construction, Power, Electrical & Electronics, Manufacturing, Heavy Engineering (building complex equipment such as reactors), Machinery & Industrial Products, Financial Services, Information Technology (IT) & Engineering Services.

L&T revenues were 9.8 Billion USD in FY09-10, of which business external to India contributed roughly 18%. Worldwide, L&T employs 60,000+ people distributed across 30+ countries. In the US, L&T employs 2,000+ people, deployed at 15 locations.

#### L&T's offerings in the Technology space

L&T has used Technology as a key differentiator and offers Technology Solutions in Information Technology & Engineering to US companies. Both L&T Infotech and L&T's Integrated Engineering Services (IES) have established differentiation by leveraging the deep domain knowledge of the parent organization. The institutionalized domain knowledge when integrated with corporate technology & engineering pedigree provides L&T clients with a winning edge. These gains are demonstrated by reducing costs, accelerating time to market and enhancing return on investments. L&T Infotech refers to this synergy as "Business to IT Connect".



## About L&T Infotech & L&T Integrated Engineering Services

L&T Infotech - a wholly owned subsidiary of L&T - is a global provider of Information Technology services, Infrastructure Management and Business Process Solutions to clients in the following verticals: Banking & Financial Services, Insurance, Energy & Petrochemicals, Manufacturing (CPG/Retail, High-tech, Industrial Products, Automotive), and Product Engineering Services (Telecom). L&T Infotech was incorporated in 1997. Worldwide revenues for the current year are expected to exceed the \$500M mark with US revenues contributing roughly 65%.

L&T IES provides comprehensive Engineering Services

in the areas of Mechanical, Civil and Embedded Systems Engineering disciplines across industries such as Industrial Products, Automotive, Aerospace, Medical, Consumer electronics, Trucks & Off-highway Vehicles, Energy and Utilities, CPG, Chemical, and Pharmaceuticals. IES maintains a staff of over 3500 engineers spanning geographies covering India, US, Europe and Asia Pacific. More than 70% of L&T IES' revenues come from the US.

L&T IES has been providing complex technical services to clients spread across industries. Moreover, IES has been conceptualizing and operating customized and flexible engagements, and expanding resources to expand capacities.



L&T North America Headquarters, Edison, New Jersey



## Global Footprint of L&T

A thrust on international business over the years has manifested in overseas revenues growing steadily. L&T maintains manufacturing facilities in India, China, Oman and Saudi Arabia. Further, the company operates a global supply network with offices at 30+ locations worldwide.

L&T customers include global majors in over 30 countries. L&T revenues generated out of US based clients and other parts of the world, exceeds a billion USD.

L&T Infotech has a presence in 20 countries with more than 30 state-of-the-art offices. The company delivers services from various locations within US, in addition to multiple delivery centers spread in Europe, the Middle East, South Africa and Canada. Earlier this year L&T Infotech inaugurated a wealth management centre in Singapore to augment and accelerate its focus in the APAC region.

## L&T in the USA

### US Operations

L&T has maintained relations with US based companies since 1945 and has been operating out of the US since the early 1990's. In recent years L&T's presence in the US, to a large extent, has been led by its IT & Engineering Services disciplines - L&T Infotech and L&T Integrated Engineering Services.

L&T Infotech has development centers in the US at Edison, NJ, Chicago, Dallas, Atlanta, San Jose, Houston and Detroit. The projected growth for L&T Infotech year over year in the United States and worldwide is forecasted at 30%; well above the industry average. L&T is poised to further extend its project and client roster in the US to include products and services from across the group of L&T companies.

### US Client Base

In addition to securing leaders of American industry as

clients, L&T's American customers have rewarded L&T with long term relationships. Notable clients include Bechtel, KBR, Dow, GE, UTC, Flour, Exxon, and Chevron. These engagements represent diverse sectors like Oil & Gas, Utilities, Industrial Products, Engineering, Infrastructure and Information Technologies. L&T's in-house capabilities in technology development are complemented by tie-ups with world leaders. The company has also engaged in long-term joint ventures with US firms like Case New Holland, Sargent & Lundy and Flowserve.

These relationships demonstrate archetype Indo-American industrial partnership.

## Success Factors

Throughout its history L&T has won numerous awards for exemplary performance, the most recent being the award for Best Infrastructure Company in India by "Business World" magazine. The company's corporate ethos infuses "Imagineering" (engineering with imagination) - a unique ability to leverage technology to spur creativity in engineering.

L&T by application of the most advanced design tools and project management methodologies; possesses the expertise and experience to undertake complex turnkey contracts with single-source responsibility. Evidence of the scale and complexity of L&T's projects can be observed in airport modernizations (International Airport, Delhi), railways (Delhi Metro), high volume motor ways (Mumbai Pune Expressway) and other large infrastructure projects.

Governance is a key attribute of L&T corporate leadership. L&T demonstrates stable and high standard governance and filters every action through integrity, fairness and transparency; thereby, affording highest priority to the visible accountability across financial & non-financial matters and processes on or off the field - without exception.





L&T's proactive investment in people and infrastructure assures business continuity with their clients. "People are our only real assets" as stated by the co-founder, H.H.Larsen and truly, L&T's success is reliant on its people. The company continuously invests in improving employee skills, capacities, commitment and motivation through comprehensive training programs.

L&T won the India Shining Star Award for Sustainability & Corporate responsibility in February 2011. The company is firmly committed to fulfilling social obligations in the communities it serves. L&T supports community welfare initiatives in healthcare, environment, education and rural development. L&T is also taking progressive steps to help the industry 'go-green' by promoting initiatives to save energy, reduce carbon emissions and help preserve the environment.

L&T's success has not been limited to the balance sheet, indeed L&T's physical infrastructure and institutional knowledge is in place for end-to-end excellence.

## Future Plans

L&T's expansion model supports a broad corporate strategy where early arrivers to a region establish a beachhead for the larger corporation. Once presence

and reputation has been solidified, the established businesses drive opportunities to growth areas, such as to L&T's IT services and consultancy arm, L&T Infotech. This model has taken hold in the United States and is evidenced by clients such as Chevron, UTC, P&G, Citi Group who have contracted for services with L&T Infotech & Integrated Engineering Services.

L&T Infotech has a DNA where innovations occur in business units continually to produce new domain solutions, and the firm makes investments to support key emerging market trends in disruptive technologies such as Cloud, Mobility, SaaS and Social Networking technologies. In addition to its own IP, L&T Infotech is not averse to inorganic growth, as evidenced by acquisitions made in the recent past.

Moving forward L&T will continue to expand its US presence through organic and inorganic means. In a similar vein, L&T Infotech and IES will continue to leverage L&T's Business to IT connect methodology, creation of its own IP, expand the portfolio of industry specific technology accelerators and solution frameworks.

L&T's unique mix of technical acumen and appreciation of business context will allow L&T group to provide superior delivery, partnership and affordability to its diverse client base.



## Mahindra Satyam

### Company Background

Global businesses today, continue to grow and evolve. Incipient with this evolution are challenges and complexities as well as new enterprise potential, just waiting to be unlocked. In the current state of global markets and market trends, new capabilities and never-before agility hold the key to ensuring business continuity and sustained profitability. In order to accelerate business performance as well as open up new possibilities, customers today, expect a synergy of service and delivery excellence, deep industry and functional expertise, leading technology best-practices and an advanced global delivery model from their partners.

Mahindra Satyam is a leading global business and information technology services company that leverages deep industry and functional expertise, leading technology practices, and an advanced, global delivery model to help clients transform their highest-value business processes and improve their business performance. Mahindra Satyam is part of the \$7.1 billion Mahindra Group, a global industrial federation of companies and one of the top 10 business houses based in India.

The Company's professionals excel in enterprise solutions, supply chain management, client relationship management, business intelligence, business process quality, engineering and product lifecycle management, and infrastructure services, among other key capabilities.



## Over 20 Years of Value Creation

For over two decades now, Mahindra Satyam has been committed to creating value for customers, investors, associates and the society at large. This commitment has constantly fuelled the journey, encouraging the company to think differently, take risks, work with passion and make things happen. Today, after 20 years, the commitment, passion and entrepreneurial spirit have only grown bigger, spurring Mahindra Satyam to look ahead and continue this journey towards achieving greater heights of Value Creation.

Today the company's success factors include leveraging the integrated experience of Mahindra Satyam, Tech Mahindra, Bridge Strategy Group, Bristlecone, S&V and Citisoft. This is done through flawless execution, global operations, focus on innovation and strategic alliances and partnerships.

## Global Footprint of Mahindra Satyam

Mahindra Satyam today has over 360 customers\*,

28,000+ Associates\*\*, 19 Global Development Centers and operations in 35 Countries.

\* As of October 31, 2010 \*\* As of October 31, 2010. The Associate numbers includes subsidiaries as well

### The company has a number of Top Global Fortune 500 Customers:

- 2 of top 5 in Chemicals
- 3 of top 10 in Pharmaceuticals
- 2 of top 10 in Aerospace & Defense
- 2 of top 10 in Oil & Gas
- 4 of top 5 in Network & Communication equipments
- 3 of top 10 in Electronics & Electrical equipments
- 5 of top 10 in Motor Vehicle and parts
- 1 of top 5 in Industrial & Farm equipments
- 1 of the top 3 Semiconductors







## RightSourcing™

Mahindra Satyam pioneered the Global delivery model called RightSourcing™. It allows for flexibility anytime / anywhere, without compromising on quality. RightSourcing™ bring customers the most suitable and optimal combination of Mahindra Satyam's onsite, onshore and offshore skill sets and delivery capabilities, resulting in the best cost and time advantages.

## Mahindra Satyam in the USA

Mahindra Satyam sees several growth opportunities across business units in the pipeline – the momentum reflecting deeper traction with existing customers through innovative new offerings. This enhanced level of CXO mind-share and innovation initiatives provide us the opportunity to renew market position and push for stronger growth in the quarters to come. Over 2,500 employees of Mahindra Satyam operate out of development centers spread across Bellevue, Laguna Hills-CA, Detroit, Cleveland and Omaha.

The Americas contribute over 50 % of the total revenues of \$1.6 billion of Mahindra Satyam. The major industries that the company serves in this market vary from Telecom to Manufacturing, Banking, Financial Services, Healthcare, Retail and Travel & Logistics. Solutions offered to clients in the region include Enterprise Business Solutions, Application Development and Management Services, Infrastructure Management Services, Integrated Engineering Solutions and Business Process Outsourcing.

## Service Offerings

>Enterprise Business Solutions > Integrated Engineering Solutions > Business Process Outsourcing >Infrastructure Management Services > Consulting and Enterprise Solutions >Industry Native Solutions > Application Development and Management Services

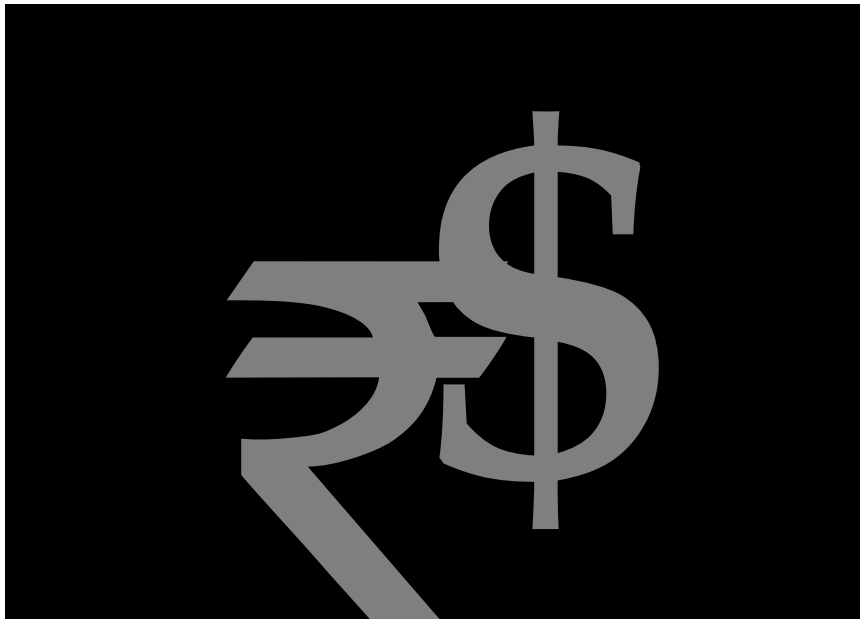
## Success factors

Mahindra Satyam's success factors include leveraging the integrated experience of Mahindra Satyam, Tech Mahindra, Bridge Strategy Group, Bristlecone, S&V and Citisoft. This is done through:

- Flawless Execution
- Global Operations
- Focus on innovation through new technology adaptation
- Agility enabling accelerated time-to-market
- Cross-vertical solutions
- Strategic alliances & partnerships

## Future Plans

Plans for the region include expansion into Latin America, combining capabilities to deliver scale & differentiation, to focus on core markets: industry and service lines. The company intends to strengthen capabilities through investment and acquisitions, and to cross & up-sell services to existing accounts.



## Mahindra USA, Inc.

### Company Background

Houston, TX based Mahindra USA, Inc. is a wholly-owned subsidiary of Mahindra & Mahindra (M&M), LTD Automotive & Farm Equipment Sector (AFS), which is part of The Mahindra Group.

The Mahindra Group was founded in India in 1945 as a steel trading company and in 1947, the Group entered automotive manufacturing to bring the iconic Willys Jeep onto Indian roads. The founders, K.C and J.C.Mahindra, believed that introducing new modes of transportation held the key to India's prosperity, so one of their first goals was to build durable, rugged vehicles that could handle the rough Indian terrain.

In the 1950s and 60s, the Group diversified into businesses like Steel, Tractors, Telecom and more. Over time, the Group consolidated its position in Automobiles, Tractors and Steel and entered promising sectors like IT, Hospitality, Financial Services, Components, Aerospace and Logistics, led by the goal of providing products and services that support prosperity.

Today, the Group is a \$7.1 billion global corporation employing more than 112,000 people in more than 100 companies and in 79 countries across the globe and is the Indian market leader in tractors, utility vehicles, non-banking rural finance and telecom software solutions. The Group's flagship company, Mahindra & Mahindra, is a global leader in the tractor and utility vehicles



Mahindra tractor in front of the company's US headquarters, Houston, Texas

space and has been named to the Forbes 200 list of the world's most respected companies, Forbes Asian Fab 50 and the Credit Suisse Great Brands of Tomorrow. Mahindra & Mahindra is also the only tractor manufacturer in the world to be awarded both the Deming Application Prize (2003) and the Japan Quality Medal (2007) for excellence in Total Quality Management, awarded by the Deming Prize Committee care of the Union of Japanese Scientists. In 2010, Mahindra & Mahindra became the #1 selling tractors in the world based on units sold.

### Global Footprint of M&M Farm Equipment

Mahindra & Mahindra has a presence in every

continent in the world except Antarctica. M&M has a strong presence in: United States, China, Australia, New Zealand, Africa (Nigeria, Mali, Chad, Gambia, Angola, Sudan, Ghana, Morocco), Latin America (Chile, Argentina, Brazil, Venezuela, Central America and the Caribbean), South Asia (Sri Lanka, Bangladesh, Nepal), the Middle East (Iran, Syria) and Eastern Europe (Serbia, Turkey, Macedonia).

Mahindra & Mahindra AFS has highly efficient, modern manufacturing plants that are ISO 9001 and QS-9000 certified, with an annual production capacity of 170,000 tractors. The Sector has 5 state-of-the-art manufacturing plants in India, 2 plants in China, 3 assembly plants in USA and 1 assembly plant in Australia. The Sector also has a subsidiary agricultural



tractor manufacturing company in India known as Mahindra Gujarat Tractor Limited (MGTL). M&M is one of the top three tractor companies in the world with annual sales above 150,000 and over 1.6 million tractors sold to date.

## M&M in the USA

Mahindra's Farm Equipment Sector has enjoyed market leadership in the Indian tractor market since 1983. With an aspiration to become a major global manufacturer in tractors, the company chose the US market, one of the most advanced agri-mechanization markets in the world, to be the starting ground for this journey around the world.

Mahindra USA was established in the United States in 1994 with the incorporation of Mahindra USA, Inc. (MUSA) at the then corporate headquarters in Tomball, TX. To meet the growing demands for its tractors, Mahindra USA established operations in Calhoun, GA (2003) and Red Bluff, CA (2005). Assembly was later shifted from Calhoun, GA to Chattanooga, TN in 2009. Also in 2009, corporate headquarters was shifted from Tomball, TX to Houston, TX to better meet the needs of its growing dealer and customer base.

Mahindra USA offers a full range of tractor models from 18 HP to 83 HP including 2 wheel drive (2WD) and 4 wheel drive (4WD); Gear, Hydrostatic and Power Shuttle transmissions; and integrated and

after-market Cabs. Mahindra also offers a wide variety of attachments and implements to complement the tractor product range. Mahindra's professional-grade tractors are built with heavy-duty components that allow them to outperform other tractors in their class and are designed to provide consumers with the ability to push more, pull more and lift more, so they can do more, in less time. All this adds up to an outstanding value for its customers and makes the tractors perfect for hobby farmers, turf managers, nursery operators and homeowners.

## MUSA Corporate Social Responsibility

Mahindra USA has gone beyond just good business practices to make a difference to the community.

- In 2008, when Hurricane Ike made a direct impact in Houston, TX, Mahindra USA employees from the plant, the corporate office, and the Parts warehouse joined volunteer efforts to handout water, food, and other critical supplies to families in need.
- In December of 2008, during the brink of the recession, Mahindra started a tradition of "adopting" a family for Christmas. Clothes, toys, and food are purchased each year to help the family have a wonderful Christmas holiday. This past holiday season, the employees of MUSA donated gently used clothes, blankets, toys, books,



Mahindra tractors at work in US farmlands



an household items to a local battered women and children's shelter.

- During the summer of 2010, Mahindra USA had its Mahindra Texas Tractor Drive to benefit the Texas Children's Hospital. A Special Texas Edition 4530 tractor hit the roads for a 1,000 mile journey across the state of Texas to collect mileage pledges for the hospital. In all, Mahindra USA donated \$33,200 to the Texas Children's Hospital.
- A team from Mahindra USA accepted the challenge to raise funds to support the 2010 Komen Houston Race for the Cure in October 2010. MUSA had a team of 6 volunteers that walked to raise money to help find a cure for breast cancer. The Komen Houston Affiliate funds vital breast cancer education, screening and treatment programs in the community and supports the national search for a cure.
- Each year, Mahindra USA sponsors four \$2500 scholarships for women who are studying in an agriculture related field. The candidates are located through the National Future Farmers of America Foundation. Additionally in F-2008 and F-2009, MUSA donated \$10,000 to the Mahindra Foundation towards its CSR initiatives.

In addition to the volunteer time and money, Mahindra USA has also donated its product to worthwhile causes and other charitable organizations:

- MUSA shipped two tractors to Haiti to aid in the cleanup efforts following the catastrophic earthquake in January 2010.
- MUSA has partnered with Kelly Tractor in Gilmer, TX to donate a tractor to the Safe Haven Equine Rescue to assist in the rehabilitation of neglected/

abused horses.

- Several tractors were donated by Mahindra USA to assist with the clean up efforts in the Gulf Coast Oil Spill.
- In Mississippi, as part of a Tournament Sponsorship, a Mahindra tractor was raffled off with proceeds going to the local St. Jude's Children's Hospital.

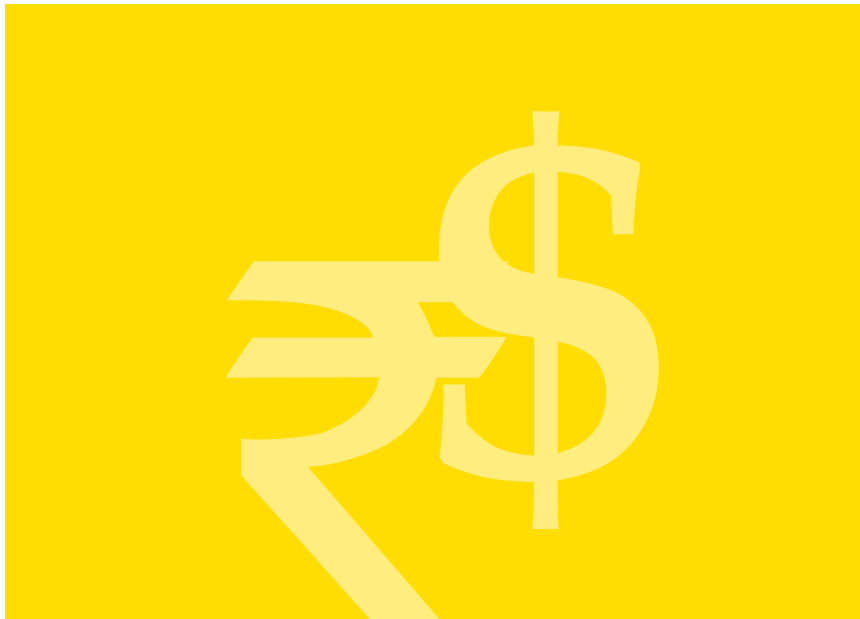
## Success Factors

### Superior Products, Service and Value

Mahindra USA has been successful in the USA due to its superior product design and by providing exceptional value to its customers and dealers. Mahindra's commitment to providing products that outperform the competition while being competitively priced has led to a strong value position within the industry. This has resulted in high levels of both dealer and customer satisfaction. In a survey conducted by the company, 98% of Mahindra product users stated that they would recommend the product to other potential users. Mahindra USA has also received the highest score in Dealer Satisfaction among all tractor players, in a survey conducted by the North American Equipment Dealer's Association (NAEDA).

## Future Plans

Mahindra USA is committed to achieving cost leadership through cost optimization, quality engineering and improved efficiencies in sales, distribution and marketing all designed to provide the best possible value to its customers. The ultimate goal for Mahindra USA is to become one of the top 3 tractor manufacturers in the North American market by 2015.

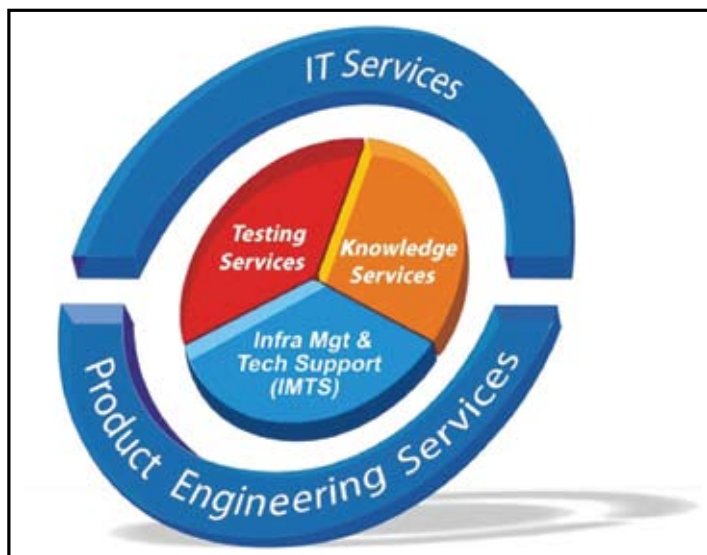


## MindTree Ltd.

### Company Background

MindTree Ltd. is a global IT Solutions company specializing in IT Services and Product Engineering Services. MindTree partners with its clients to create a transparent, value-based relationship. Mindtree's employees build innovative solutions in a wide range of technology domains that enable customers to succeed in their business goals.

Mindtree's mission statement reinforces that the two most important stakeholders are the customers and the people. The company believes that Happy People lead to Happy Customers and also that Innovative Solutions are a means of contributing to the success of customers.



## Growth and Stake Holder Satisfaction



## Global Footprint of MindTree

MindTree is co-headquartered in Bangalore, India and Warren – New Jersey, USA and has a presence in Australia, Belgium, China, France, Germany, Japan, Singapore, Sweden, Switzerland, UAE and United Kingdom. In addition, the company has four delivery centers in India located in Bangalore, Chennai, Hyderabad and Pune.

## MindTree in the USA

In the US, MindTree today does business in 38 out of 50 states. To support this portfolio, MindTree has a development center in Warren, New Jersey and four offices in Schaumburg IL, Irving, TX, San Jose CA and Bellevue, WA.

In the US MindTree has also undertaken social initiatives with organizations such as Habitat for Humanity, Dress for Success, NJ Care.

## Success Factors and Future Plans

MindTree plans to focus on strengthening its client relationships .It also aims at widening its scope of service offerings in its areas of competence.

MindTree is building domain specific frameworks in the selected industry verticals like

- Banking
- Consumer Goods
- Insurance
- Media
- Retail
- Travel

In R&D area MindTree intends to bring in IP led offerings in the areas of:

- Blue Tooth and UWB
- Intelligent Video Surveillance
- Tele Medicine

In Software Product Engineering area MindTree will strengthen its presence in:

- Cloud & SaaS
- Mobility and Open Source





**NIIT**  
technologies

## NIIT Technologies, Inc.

### Company Background

NIIT Technologies is a leading global IT services organization, servicing customers in North America, Europe, Asia and Australia and is traded at the National Stock Exchange (NSE) and Bombay Stock Exchange (BSE) in India. NIIT Technologies has a rich legacy having emerged from NIIT Ltd. which pioneered IT education giving shape to the prominent position India holds as a technology hub of the world. Formerly the Software Division of NIIT Ltd, NIIT Technologies was spun off in 2004 to exploit the dominant position India has in the global outsourcing industry. Since the demerger NIIT Technologies has transformed itself from a provider of generic technology services to be a leading industry specific solution provider.

The Company offers services in Application Development and Maintenance, Enterprise Solutions including Managed Services and Business Process Outsourcing to organizations in the Financial Services, Insurance, Travel, Retail and Distribution, and Government sectors. NIIT Technologies decided to go non-linear as early as 2006, when it acquired UK-based Insurance solutions provider Room Solutions, well known for Subscribe, its offering for the commercial insurance sector. In 2007-08, in line with its inorganic growth initiatives, the Company acquired SofTec GmbH, a Germany-based company providing IT solutions in the airlines revenue and accounting arena. The Company employs over 5300 professionals globally and follows



NIIT Technology Office in Atlanta, Georgia

global standards of development. NIIT Technologies embraces the potential of Cloud Computing as an early entrant into this space; it is ready to deliver end-to-end solutions to its customers.

## Global Footprint of NIIT Technologies

NIIT Technologies is servicing customers in North America, Europe, Asia and Australia. The company operated in 14 countries including the USA, UK, Germany, Netherlands, Singapore, and Australia. Its US Headquarters is based out of Atlanta, Georgia. Further, the company has near-shore development centers in the USA, Europe and Asia Pacific.

## NIIT Technologies in the USA

NIIT Technologies has six main offices in the US, in Atlanta (North America Headquarters), New Jersey, Philadelphia, Dallas, San Francisco, and Chicago. A

total of 1499 employees support NIIT Technologies US business of which 465 employees are based in the US. The core sector services are: Travel, Transportation and Logistics, Insurance (Property and Casualty and Life), Financial Services (Asset and Wealth Management), Healthcare (Product/IPR led; provider and payer).

In terms of geographic mix, NIIT Technologies had 43 percent of revenues coming in from EMEA (Europe, Middle East and Africa) during 2010. The Americas stepped up their contribution to 33 percent in 2009-10, while revenues from APAC increased to 13 percent. NIIT Technologies revenues for 2009-2010 stood at 75.4 Million.

NIIT Technologies supports major F500 clients in US in Insurance and Travel space; relationships on an average are more than 8 years old.

## Success Factors

### The Preferred IT Partner

NIIT Technologies consolidates its position in industry segments of strength and exit from those where its services remain undifferentiated. As the Company evaluates its portfolio of services, it also embraces new segments where it feels it can compete effectively. Growth for NIIT Technologies has been through both organic and inorganic means as the Company enhances specialization in the business. Over the years the Company has forged extremely rewarding relationships with global majors, a testimony to mutual commitment and its ability to retain marquee clients, drawing repeat business from them. The Company's vision is to be the "First Choice" of services for the focused segments serviced and be significant in innovation and client delight instead of high volume low impact deals.

### Stringent Quality Standards

NIIT Technologies follows global standards of development, which includes ISO 9001:2000 certification, assessment at Level 5 of SEI-CMMi



and ISO 27001 information security management certification. Its data centre operations are assessed at the international ISO 20000 IT management standards.

### “Consistently the First Choice”

The Company’s vision is to be the first choice of services for the segments serviced. The recent independent industry surveys have supported this view. NIIT Technologies has secured No.1 rank amongst all IT Outsourcers globally for the third year in a row in the Datamonitor Black Book of Outsourcing 2010 Travel Industry survey. . NIIT Technologies also stood at world #3 as an overall outsourcer with top honors in critical business and technology parameters. Datamonitor Black Book of Outsourcing survey is the world’s largest investigation into customer satisfaction with IT Outsourcing

### Future Plans

The way NIIT Technologies will do business in the next decade will be dramatically different from the way it was done in the last decade. In the last decade the value proposition was essentially an arbitrage on cost. Going forward, while cost will remain important the focus would be in adding value. To do so, NIIT Technologies has launched new businesses around Infrastructure Managed Services and IP Asset/ Platform based Services. Lately, the Company has acquired an electronic health records and referral management platform to initiate its foray into the lucrative healthcare segment in the US. Add to this the Company has recently tied up with Hitachi Information Systems to launch Cloud Computing Services. These new businesses, collectively form non linear services, are already contributing to 27% of its revenues. This is expected to increase to 35% by 2012.



**POLARIS**  
live your dream

## Polaris Software Lab Ltd.

### Company Background

Founded in 1993, Polaris Software Lab Limited (POLS.BO) is a leading Financial Technology company headquartered in Chennai. With its comprehensive portfolio of products, smart legacy modernization services and consulting, Polaris offers state-of-the-art solutions for Core Banking, Corporate Banking, Wealth & Asset Management and Insurance.

A leader in Financial Technology, Polaris is proud to be associated with the best names in the Financial Technology world across Geographies. Polaris believes that value creation in an outsourcing relationship grows as customer relationships mature with time. Relationship, expertise, technology, Intellectual Property and Global Reach are the routes that enable the company to come closer to its customers worldwide.

### Corporate Strategy

Polaris seeks to further its journey towards leadership position in the Financial Technology space with a well differentiated solutions and services portfolio to increase market share through:

- Focus on the key strategic accounts and seek opportunities to cross-sell and up-sell
- Expand in new countries through Intellect solutions



- Enhance brand visibility in the marketplace by collaborating with analysts and participation in leading industry forums
- Scout for inorganic growth opportunities

## Global Footprint of Polaris

Polaris is the world's first CMMi Level 5 certified company in India. It also complies with the international information security standard, BS7799, for its various processes. The Smithsonian Institute recognized Polaris in 1993 for developing the first banking solution on a distributed architecture.

Polaris is the chosen outsourcing partner for 8 of the top 10 global banks and 6 of the 10 top global insurance companies. The company has 29 offices in 20 countries which include all global financial hubs like Tokyo, Sydney, Hong Kong, Singapore, Dubai, Bahrain, Riyadh, London, Belfast, Zurich, Frankfurt, Toronto, New York, Chicago, Fremont, Pittsburgh and Chile.

The experience of relationships with BFSI entities across developed markets like USA & Europe to emerging markets like Vietnam and Chile is a significant differentiator for Polaris. The company has hands-on participation in implementing Financial Technology solutions in the most mature & dynamic market to an emerging market. This strengthens Polaris' global knowledge on Banking, Financial Services & Insurance thereby making it the domain expert in delivering the right financial technology solutions. This makes Polaris' presence across 20 countries in 6 continents worthwhile as it understands both, the global financial practice and country specific processes.

## Polaris in the USA

### Mode of Operation

The company provides IT products and services to various clients in 20-plus states in the USA. It is headquartered out of Iselin, NJ and has front-end sales

offices located in Jersey City, NJ, Fremont, CA and Naperville, IL, and has representatives in Los Angeles, Texas, Kentucky, and Georgia. Polaris' Insurance business is managed from its office in Pittsburgh, PA. The company also manages its sales offices in Toronto, Santiago and Chile from its US head office in Iselin, New Jersey. Polaris also has onsite testing centers in New Jersey and Toronto. The company is further present in the USA through its subsidiary, Optimus Global Services Limited, which operates in the ITES segment. In the USA, Polaris offers software and solutions for various applications such as Retail Banking, Internet Banking, Private Banking, Investment Banking, Consumer Credit, Payment Cards, Cash, Trade, Risk and Treasury, Insurance and Retail.

The company generated approximately 44% of its quarterly revenues in Q3, FY 2010-11 from the US business.

## Success Factors

### Products

Polaris' strength lies in its people comprising world-class bankers, peerless information technology experts and quality assurance champions who ensure the best possible outcomes for customers. With talent strength of over 10,000 solution architects, domain consultants and techno bankers, the company owns the largest set of Intellectual Properties in the form of a comprehensive product suite, Intellect™-TM Global Universal Banking (GUB). Intellect™ GUB is a pure play Service Oriented Architecture (SOA) based application suite comprising 9 key platforms and 25 products for delivering mission-critical solutions for Retail Banking, Corporate Banking, Treasury and Liquidity Management, Core Banking, Capital Markets, Asset & Wealth Management and Insurance. The Intellect suite gives us the opportunity to tap market potential in 60 countries in the world to enable banks and financial services deliver services efficiently.



## Sourcing

Polaris' global sourcing is a result of two decades of learning and partnering with the world's top banking and insurance companies and is driven by business outcomes rather than pure cost arbitrage led outsourcing. The company services global customers from its Centers of Excellence called 'Entity' that were created to equip businesses with the right enterprise management systems, technology, tools and methods enabling them to make best of their IT investments. The expertise of Entity lies in its ability to utilize domain knowledge, outsourcing experience and Intellectual Property to deliver superior technology solutions that are aligned to the business outcomes of our customers.

## Future Plans

Two quarters back, Polaris made its first foray in the US with an implementation when a leading bank trusted Polaris' Intellect™ GUB as the technology

enabler for their modernization strategy. Likewise, last quarter Polaris saw Intellect™ going live for two North America customers, which provided the company with strong tailwinds for its journey. Polaris' complex solution in the Bank of Montreal was one of the fastest implementations for such a large account. Another large North American bank which chose Intellect™ to grow their corporate banking business in the Asia Pacific and Europe regions, has gone live in 16 countries in less than 21 months.

In the words of Arun Jain, Founder, Chairman & CEO, Polaris Software Lab Limited, "The Intellect™ suite has given us the opportunity to tap market potential in 60 countries worldwide and 8 out of 10 top global banks use our product. This year I was pleasantly surprised during Sibos 2010, where heads of the world's top 30 banks engaged with our FT experts and openly discussed their business problems. To their delight, we had solutions for all their problems, and our challenge for 2011 will be to capture the demand and convert it into firm orders."



# RANBAXY

## Ranbaxy Laboratories Ltd.

### Company Background

Ranbaxy Laboratories Limited (RLL), India's largest pharmaceutical company, is an integrated, research based, international company, producing a wide range of quality, affordable generic medicines, trusted by healthcare professionals and patients across geographies. The company enriches lives globally by providing quality and affordable pharmaceuticals. To date, Ranbaxy has over 130 approved applications from the U.S. FDA, with more than 70 applications under review. The filing of these applications supports Ranbaxy's commercial business in the marketing of quality prescription and over-the-counter medicines available at affordable prices.

In June 2008, Ranbaxy entered into an alliance with one of the largest Japanese innovator companies, Daiichi Sankyo Company Ltd., to create a generic pharmaceutical powerhouse. The combined entity now ranks among the top 20 pharmaceutical companies, globally.

### Global Footprint of Ranbaxy

Established in 1961, the Ranbaxy Group of Companies is proud to celebrate 50 years of excellence in the healthcare industry. Over the years, Ranbaxy has grown to a multinational organization with operations in more than 125 countries, across six continents. Ranbaxy entered the U.S. market in 1994 and opened its first office in Raleigh, North Carolina in January 1995. Subsequently,





Ranbaxy Manufacturing Facility, New Brunswick, New Jersey

the company relocated to New Jersey in 1998. Today, Ranbaxy's U.S. presence spans from New Jersey to New York and Florida while commercializing and distributing products in all 50 states.

### Ranbaxy in the USA

In the U.S., generic products have become more visible and prominent with nearly 73 percent of all prescriptions being filled with generic product formulations. As a generic drug company working to reduce healthcare costs, Ranbaxy Inc. drives a broad portfolio of medicines out of FDA-inspected, state-of-the-art manufacturing and distribution facilities. Product offerings include multisource generic prescription pharmaceutical products, branded dermatological products, and over-the-counter medications. In total, Ranbaxy Inc. has

gained FDA approval for more than 130 generic product formulations in the U.S. Ranbaxy maintains five facilities including its regional headquarters in Princeton, NJ; distribution center in Jacksonville, FL; and manufacturing facilities in North Brunswick, New Brunswick, NJ and Gloversville, NY.

Sales in the U.S. totaled \$602.1 million in 2010, up from \$347.7 million in 2009, a growth of 73 percent. The substantial growth can largely be attributed to key factors in the generic segment such as sustained dominant market share of Valacyclovir, the benefit of a one-time opportunity with Oxycodone ER, and the launch of Donepezil. In the past five years, Ranbaxy Inc. invested \$90.3 million, which includes \$15.1 million in 2010. Investments supported the expansion of manufacturing facilities, product acquisitions and improving the company's information technology infrastructure.



September 2010 marked the 15 year anniversary since Ranbaxy Laboratories Limited (RLL) purchased Ohm Labs located in North Brunswick, NJ, its first manufacturing site in the U.S. and now the mainstay for U.S. business operations. During 2010, the capacities and capabilities expansion was concluded at Ohm, making it Ranbaxy's largest global facility in terms of tablet/capsule capacity in Ranbaxy's global manufacturing network. In 2010, top sellers, Valacyclovir and Donepezil were manufactured at Ohm. Product development was also augmented at Ohm to enable more Abbreviated New Drug Applications (ANDAs) filings to be submitted to the U.S. FDA (from U.S. sites).

Currently, Ranbaxy employs more than 14,000 individuals globally. In the U.S., the company employs more than 700 Americans with the payroll totaling \$55 million. In comparison to 2006, the company increased staffing by 34 percent when it employed approximately 525 Americans. Additionally, 50 new jobs are likely to be added in 2011. The future is promising for Ranbaxy: As the workforce continues to grow in 2011.

## Success Factors

At Ranbaxy, social responsibility is an integral part of the company's corporate character with special emphasis placed on the environment, health and safety. Ranbaxy has pioneered worldwide efforts to

treat HIV/AIDS, malaria and other pandemics, often partnering with governmental agencies and NGOs.

The White House recognized Ranbaxy for its help during Hurricane Katrina. More recently, contributions were made through U.S.-based relief organizations to provide aid to the devastation experienced in Haiti. Ranbaxy donated prescription products of substantial value, and more importantly of great need. The products were hand-delivered to Haiti through the program's Medical Director within a few days of the disaster. On a local level, the company supports the community by making contributions to the public library, civic programs sponsored by universities, and local charities. Remaining committed to the communities it serves by delivering high quality, affordable products is of utmost importance at Ranbaxy.

## Future Plans

Ranbaxy will continue to support the growth of generic, brand and over-the-counter pharmaceutical products in the U.S. More specifically, the company looks forward to reinforcing its global footprint, increasing its presence in the US healthcare system and having a positive contribution to federal and local economies. Thus the company's operative words and Ranbaxy's commitment to: "Trusted medicines. Healthier lives."



## Religare Enterprises Ltd.

### Company Background

Religare is an emerging markets financial services group with a presence across Asia, Africa, Middle East, Europe, and the Americas. In India, Religare's largest market, the group offers a wide array of products and services including broking, insurance, asset management, lending solutions, investment banking and wealth management. With 10,000-plus employees across multiple geographies, Religare serves over a million clients, including corporate and institutions, high net worth families and individuals, and retail investors.

### Global Footprint of Religare

In addition to building market-leading positions across multiple financial service verticals in India, Religare Enterprises, through its subsidiaries and affiliates, operates in more than 10 countries across Asia, Middle East, Europe and the Americas. Globally, Religare is aiming to create a multi boutique asset management platform and an Emerging Markets focused Investment Bank. The group vision is to be the leading emerging markets financial services group driven by innovation, delivering superior value for all stakeholders globally.



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## Religare in the USA

Religare, via its wholly-owned subsidiary, Religare Global Asset Management, Inc. (“RGAM”), established a presence in the United States in 2010. Through RGAM, Religare intends to build over a period of time, a multi-boutique asset management platform via the acquisition of ownership stakes in several industry-leading, best-of-breed asset management firms. RGAM completed its first transaction in 2010 when it acquired a majority stake in Northgate Capital. Based in the San Francisco, CA bay area, Northgate manages approximately \$3 billion on behalf of institutional investors including pension plans, governments, foundations and endowments. Northgate’s partners and professionals have built a distinguished, multi-year track record as a leading manager of private capital fund of funds and direct private equity investments.

In 2010, RGAM also entered into an agreement to acquire a majority stake in Landmark Partners, a Simsbury, Connecticut based firm that is a leading asset management firm focused on secondary market transactions of private equity and real estate funds. Landmark manages approximately \$8.5 billion of committed capital on behalf of Taft-Hartley

plans, endowments, foundations, governments and pensions.

## Success Factors

Religare’s success in the United States can be attributed largely to innovative and entrepreneurial spirit of the group and its focus on partnering with elite and proven management teams. The uniqueness of Religare, as an India-based financial firm and its value proposition have positioned Religare as desired partner for US-based asset management firms interested in globalizing. In particular, many US-based firms seeking to expand their international product capabilities and investor footprint can leverage Religare’s vast network across the world to increase their knowledge and connectivity and gain access to new and distinctive investment opportunities

## Future Plans

RGAM recently established an office in New York and continues to expand its staff and gain visibility in the financial services marketplace. In the future, RGAM expects to make further acquisitions to build out its platform of leading asset management boutiques and deliver value as a strategic partner.



**State Bank of India**

State Bank of India

### State Bank of India in the USA

State Bank of India has been in the USA for four decades. The Bank has:

- Two FDIC insured, full service, branches in Chicago and New York,
- A wholesale agency in Los Angeles,
- A second, non-FDIC insured, branch in a New York City suburb,
- A representative office in Washington, DC, and
- A state chartered, FDIC insured, subsidiary- State bank of India (California) which has nine branches.

SBI has approximately 300 employees in the USA, 70% of who are recruited locally. SBI is the only Indian bank to be a member of the New York clearing house (CHIPS) in addition to the Federal Reserve's Fedwire payments systems.

SBI's US Operations provide predominantly wholesale banking services although the FDIC insured branches can accept retail deposits. At present, SBI's offices do not offer consumer lending. Amongst the products offered are:

- Corporate loans, including national and international syndications



- Trade finance products and services
- Correspondent banking
- Fund transfers & remittances (primarily to India)
- International Debit cards-Advantageous for travelers to India by free use of SBI ATMS.
- Financing overseas acquisitions by Indian corporations

Bilateral trade between the US and India has increased dramatically over the past five years and SBI has fully participated in financing this trade by issuing, advising

and confirming letters of credit by both Indian and American exporters.

## Community Involvement and Success Factors

SBI offices participate in their local communities as part of complying with Community Reinvestment Act requirements. These offices help finance low and moderate income housing and businesses in areas designated by the US regulators as being in need of economic development. Besides funding worthy causes the staff of SBI's local offices contribute their time in efforts such as developing financial literacy.



**SUZLON**  
POWERING A GREENER TOMORROW

## Suzlon Energy Limited

### Company Background

Suzlon Energy Limited has grown to be a global top three wind player\*, and the only global wind power company that comes from an emerging market. The Suzlon Group's product portfolio is aimed at taking wind energy to every type of customer, market and wind regime – ranging from sub-megawatt on-shore turbines at 600 Kilowatts (KW), to the world's largest commercial wind turbine at 6 Megawatts (MW), designed for offshore operations. This truly global product and service offering has allowed Suzlon to maintain a strong market position through the economic downturn. Suzlon's diverse client portfolio includes companies from various sectors and backgrounds, including private and public sector companies, power utilities and independent power producers.

Suzlon's investments in backward integration and R&D allows the company to take advantage of opportunities that many others cannot reach – as a component manufacturer, as a wind turbine manufacturer, and a full spectrum solution provider – and in more parts of the world than its competitors.

Suzlon pioneered the 'concept to commissioning' model in the wind energy industry, opening the market to new customer segments. Suzlon's services range from feasibility studies, complex front-end engineering design, construction, installation and commissioning to long-term operations and maintenance as well as the breadth and depth of customer requirements





across the wind energy value chain. This enables Suzlon to provide end-to-end turnkey solutions and allows individual financial investors to purchase Suzlon turbines – a first in the global wind market.

Rooted in the experience Suzlon gained in building the Indian wind energy market, the company has taken innovative steps to remain competitive in a difficult economic environment and further the growth of the renewable energy sector as a whole, globally. One example of this is Suzlon's strategy of vertical integration – through the acquisition of leading gearbox manufacturer Hansen, establishing SE Forge as a premier forging and foundry company and wind component specialists like Suzlon Generators.

## Global Footprint of Suzlon

Headquartered in Pune, India; SEL has a presence across 32 countries, over USD 4.3 billion in revenues, over 13,000 employees worldwide, over 15,000 megawatt (MW) installed, manufacturing on three continents, and world class research and development centers in Germany, The Netherlands, Denmark and India.

Suzlon's 'global experience, local expertise' approach to human capital has ensured a multi-faceted talent pool that includes over 27-nationalities. Suzlon relies on the advantage of leveraging local talent and creating a truly global expert workforce. Careful strategic expansion of operations in key international

wind energy markets and presence in emerging markets is further strengthening Suzlon's global integration.

## Group Companies

### Repower Systems AG

REpower is a recognized technology leader with a strong presence in Europe. It controls approximately 10 per cent of the German market share for wind. It has a capacity of 1,250 MW with a planned expansion of an additional 450 MW. REpower manufactures medium to high capacity WTG (1.5 to 6 MW) and has employee strength of 1,150. Suzlon acquired a stake in REpower in May 2007; and in 2009 Suzlon raised its stake in REpower to over 90 per cent and became the majority stakeholder.

## Suzlon in the USA

Suzlon established its US presence as Suzlon Wind Energy Corporation and its first wind turbines in Southwest Minnesota in 2004, which later became home to Suzlon's first blade manufacturing facility outside India. The American sales and service subsidiary is headquartered in Chicago, Illinois and boasts more than 1,200 wind turbines installed across the U.S. with 25 wind power sites that service and maintain its fleet.



Suzlon wind turbine, Minnesota



Suzlon wind turbines, Spanish Fork

The 2,500 megawatts of installed wind power capacity is backed up by a state-of-the-art 24/7 monitoring center located in the North American headquarters along with approximately 75 other employees in the departments of engineering, safety, supply chain, sales and finance. Currently, the subsidiary has 430 employees with well over 300 of those employees

either supporting or serving as technicians in the field to maintain wind power plant operations and troubleshoot issues as they arise. Major customers of Suzlon Wind Energy Corporation include well known energy companies like Exelon Energy, Duke Energy, Iberdrola Renewables, Horizon Wind/EDP and Edison Mission Energy.

### Success Factors

<p><b>1</b> Emerging markets</p>	<ul style="list-style-type: none"> <li>• India: A high margin market, capitalizing on the robust growth</li> <li>• Entrenched in China, Brazil</li> <li>• Early entrant in South Africa, Chile, Argentina and Mexico</li> </ul>
<p><b>2</b> Offshore &amp; key stable EU markets</p>	<ul style="list-style-type: none"> <li>• Well entrenched with a comprehensive product portfolio for Offshore</li> <li>• Performing well in Germany, France, UK, Italy Turkey</li> </ul>
<p><b>3</b> Global Sales &amp; Service Organisation</p>	<ul style="list-style-type: none"> <li>• Relationship with 11 clients out of Top 15 customers</li> <li>• Robust global sales infrastructure ensuring excellent service with higher Machine Availability &amp; reliability</li> </ul>
<p><b>4</b> Product portfolio</p>	<ul style="list-style-type: none"> <li>• Covering all wind classes I, II, III and all customer and market segments</li> <li>• Product range from 600 KW to 6.15 MW delivering competitive cost / kWh</li> <li>• End -to-end business solution provider with strong execution skills</li> </ul>
<p><b>5</b> Low cost manufacturing &amp; sourcing</p>	<ul style="list-style-type: none"> <li>• Majority of the manufacturing in the Low Cost Countries already established</li> <li>• Additional capacity creation requires low capex</li> <li>• Fully developed Asia centric supply chain</li> <li>• Healthy gross profit margins</li> </ul>
<p><b>6</b> Lower operational cost</p>	<ul style="list-style-type: none"> <li>• Lower fixed cost structure/MW</li> <li>• Lower breakeven volumes</li> </ul>

\* Suzlon and REpower, if taken together, stand as the world’s third leading wind turbine supplier group in terms of market share. Market share of 9.8 per cent is derived from BTM Consult ApS World Market Update 2009, ranking Suzlon with 6.4 per cent of global market share and REpower with 3.4 per cent of global market share.



**TATA COMMUNICATIONS**

## Tata Communications

### Company Background

Tata Communications is a global facilities-based provider of integrated communications services and part of the \$67.4 billion Tata Group of companies. The company leverages its Tata Global Network, vertical intelligence, and leadership in emerging markets to deliver value-driven, globally managed solutions to multinational enterprises, service providers, and Indian consumers. Tata Communications' strategy is based on its strong presence in emerging markets, its portfolio of IP and Cloud services, and its transformation to a Managed Services business model. It focuses on serving key vertical segments, including banking & financial services and media & entertainment, as well as providing catalyst services like Telepresence, Content Delivery Networks (CDN) and Ethernet solutions.

Tata Communications achieved annual FY2010 revenues of \$2.4 billion. India is its largest geographical market and accounted for 27.2% of the total revenues in FY2010. Other market revenue is split as follows: the US accounts for 18.1%; the UK accounts for 11%, Canada accounts for 4%, and Rest of the World accounts for 39.7%.

Tata Communications Limited is listed on the Bombay Stock Exchange and the National Stock Exchange of India and its ADRs are listed on the New York Stock Exchange. (NYSE: TCL)

## Global Footprint of Tata Communications

Fueled by the financial stability and long-term strategic vision of the Tata Group, the company launched its operations in North America, EMEA, and APAC to establish the local knowledge and presence to support a burgeoning global client base. Unified under a single brand, Tata Communications is committed to spearheading innovation and value in global services. Tata Communications' depth and breadth of reach includes leadership in Indian enterprise data services, leadership in global international voice, and strategic investments in operators in South Africa (Neotel), Sri Lanka (Tata Communications Lanka Limited), Nepal (United Telecom Limited).

Tata Communications has offices, people, and infrastructure around the world. The company has offices in more than 80 cities in over 50 countries and employs seasoned professionals from around the globe; of the 6,400 employees, 19% are located outside India. The Tata Global Network spans across the globe to more than 200 countries across 400 PoPs, and nearly 1 million square feet of data center and colocation space worldwide. The company's scale of transformation services partnerships include: 1,600 service providers; 785 mobile operators; 650 IP customers; 480 direct voice bilaterals; 55 IP peering partners; 40+ Network to Network Interfaces (NNIs).

For Tata Communications, "going global" continues to be a key component of its growth strategy and over 70% of the company's revenue is from countries outside India. Externally, analysts seem to agree with the company's strategy, and in 2010 Tata Communications entered Gartner's highly regarded Magic Quadrant for Global Network Service Providers, and ranked the "highest new entrant on any Magic Quadrant." Gartner noted the company's global reach:

- "Tata Communications' extensive network of undersea cables give it the ability to deliver high-capacity services, such as Ethernet, to the major

markets at very competitive prices.

- The Company's significant point-of-presence (POP) density in India, extensive presence in Middle East and growing coverage of Africa, make it especially attractive for enterprises seeking coverage in these regions."

## Tata Communications in the USA

The U.S. is an important market for Tata Communications and the Tata Group of companies. The Tata Group has been a part of the North American market for over 60 years. As the largest India-headquartered multinational in North America, the Tata Group has 12 companies and more than 16,000 employees in the U.S. and Canada.

In 2003, Tata Communications (then VSNL) decided to pursue international expansion and formed a wholly-owned subsidiary, VSNL America. The company hired its first employee in 2004, and today has 700 employees spread throughout 25 locations in the America's region. Tata Communications' U.S. corporate office is located in Herndon, Virginia, and it also has offices in San Jose, California, and Matawan, New Jersey. The company continues to expand in the U.S. market, both organically and inorganically. It recently completed the acquisition of BitGravity, an award-winning content delivery network to enhance the company's global media and enterprise strategy.

Tata Communications and its employees take the responsibility and the initiative to connect with the community by participating in programs and offering communications solutions that greatly impact people and the environment, enriching the lives of others and the lives of our employees. In the U.S., Tata Communications has active local Corporate Sustainability (CS) programs tied to its major offices in Virginia, California, and New Jersey. Company volunteers support initiatives from gifting toys to children, helping abused women, raising funds in support of finding a cure for cancer, supporting soldiers, and other charitable giving causes. Key initiatives this year in the U.S. are:



Tata Communications Headquarters, Herndon, Virginia

- **Health and Wellness** initiatives aimed at providing outreach and care to homeless children and children living with serious illness. This year, the team in the U.S. has outreach programs to support the Reston Interfaith Coat Drive, Habitat for Humanity, YMCA sports programs, and Breast Cancer Research.
- **Literacy and Education** initiatives to support a new world of communications by providing access to a world of information and opportunity. Tata Communications and First Book partner to donate thousands of new books to help cultivate the imaginations of low-income children.
- **CO2 Emissions Reduction** initiatives to help its customers decrease their reliance on business travel, which reduces CO2 emission rates. The Tata Communications Telepresence Global Exchange service leverages technology to provide companies with a virtual meeting space that is a cost-effective

and environmentally responsible alternative to business travel.

## Success Factors

1. **Relationship Building** – Tata Communications invests in building long-lasting relationships with customers and partners. The company has found success in starting small and building long-term relationships over time. As Jim Hamrick, Vice President of Enterprise Sales often said, “give us a small part of your business, let us do it well and then let us bid for more of your business.” In the service provider segment, Tata Communications also builds relationships by partnering with domestic and global carriers to provide managed services, global capacity, and IP-enabled solutions on its worldwide network.
2. **World-Class Customer Support** - Tata Communications tested formulas until it found the



right balance of leveraging international personnel and U.S.-based support to deliver world-class customer service, expected by the most demanding Fortune 2000 firms. The company's executives are also quite accessible by customers and have regular meetings with key customers.

**3. Flexibility** - Tata Communications tends to be quicker and more flexible to reach customized solutions than many of its competitors. Flexibility is one of the company's best attributes. Through Gartner's independent research, their clients "consistently cite flexibility in account management and responsive trouble resolution as strengths for Tata Communications' data services".

**4. Broad Portfolio** – As the company moves up the value chain and has gone from offering one service in 2002 to over 30 today, the landscape becomes increasingly competitive. To maintain its competitive edge and support this growth, the company hired experienced people around the globe and is very active pursuing certifications to ensure it meets the highest global standards. Tata Communications also leverages strategic partnerships and pursues acquisitions to build its capabilities and reach. For example, the company expanded its capability in the media and entertainment sector through the acquisition of BT Group plc's (BT) Mosaic business in 2010 and Bit Gravity in early 2011.

**5. Leverage Technology** - Tata Communications uses technology to manage costs and improve efficiency. For instance, the company uses internally a service it sells - Telepresence an immersive, high-definition video conferencing for workshops, interviews, and everyday meetings to reduce communications challenges, reduce travel costs, and save time. According to

Gartner, "Public room video and telepresence exchange services have raised awareness of Tata Communications' high-bandwidth capabilities."

## Future Plans

As a global challenger, Tata Communications is poised for growth. The company is striving to be amongst the leading providers of global/multi-regional services to multinationals, with an emphasis on emerging markets and managed services, including collaboration, security, data center, and voice solutions. Tata Communications plans to expand its cloud computing and cloud services offering outside of India, launching global cloud in 2011 in Asia, the United States, and Europe. Its focus for 2010-2012 is to:

- Redefine "Wholesale" – Integrated, Turnkey, White Label
- Continue to expand India access networks
- Focus on catalyst services: Telepresence, CDN/ Mosaic and Ethernet
- Achieve global benchmarks in customer service and operations
- Create at least one new "home market" (in addition to India and South Africa)

Tata Communications' current priorities are to use its industry-leading expertise to provide business transformation solutions to global service providers and large multinational customers that leverage next-generation technologies, enhance profitability, and drive value creation. Simultaneously, the company will seek new strategic partnerships to increase its competitive position in the U.S. marketplace.



**TATA CONSULTANCY SERVICES**

## **Tata Consultancy Services Ltd.**

### **Company Background**

Tata Consultancy Services (TCS), a part of the Tata Group, is a leading global provider of IT services, business solutions, and outsourcing. It started its operations in 1968, as a provider of data processing services to the other companies in the Tata Group. In the early 1970s, TCS began providing IT application development and maintenance services to customers in developed markets, such as the US and the UK. TCS currently offers a range of services including IT services, consulting, business process outsourcing (BPO), engineering services and IT infrastructure services. It serves customers across industries including banking, financial services and insurance (BFSI), telecom, manufacturing, life sciences and healthcare, energy and utilities, transportation, retail, etc.

### **Global Footprint of TCS**

TCS has 140 offices spanning 42 countries. It now employs more than 186,500 associates around the world. It is the first IT firm in the world to have an enterprise-wide CMMi and P-CMM Level 5 assessment. TCS also pioneered the adoption of the flexible 'Global Network Delivery Model™' in software development. TCS generated consolidated revenues of US\$ 6.3 billion for the fiscal year ended 31 March 2010.



## TCS in the USA

The company operates in the USA through its wholly-owned subsidiary, Tata America International Corporation.

TCS started offering its services in the US in 1971. It set up its first office in New York in 1979, thereby becoming the first Indian technology company to commence operations in the US. Currently, with more than 20 offices in North America and more than 18,000 skilled professionals, TCS generated approximately 53.5 per cent of its global revenues from its North American operations in the quarter ending December 31, 2010. TCS is the first Indian IT company to cross the US\$ 2 billion mark in quarterly revenues from its global operations in the quarter ending December 31, 2010. Its North America operations have now surpassed US\$1 billion in quarterly revenue.

TCS serves 49 of the top 100 Fortune 500 U.S. companies, and is posing strong competition to US-based IT firms. It has several delivery centers in North America including, Phoenix, Arizona, Midland, Michigan, Edison, New Jersey, Cincinnati, Ohio, and Mississauga, Ontario

In addition, TCS has several innovation labs: Telecom, Media and Entertainment Lab - (Burbank), Performance Engineering Lab (Cincinnati), and RFID Technologies Lab –(Cincinnati)



TCS' Seven Hills Park Delivery Center in Milford, Ohio

TCS won Workforce Management's 2010 Optimas Award for General Excellence, the first non-US company to receive this prestigious HR award. The company was also selected as the winner of the Delaware Valley HR Department of the Year 2010 Awards in two categories – the HR Excellence Awards for Leadership Development and the HR Excellence Award for Diversity. In addition, TCS was one of six recipients to win the 2010 Investing in People Awards by the Workforce One Investment Board of Southwest Ohio for its goIT initiative and was ranked 5th and topped the list among IT services companies in the 2010 Bloomberg BusinessWeek Tech 100, a ranking of the world's best performing tech companies.

TCS America also has significant R&D relationships with leading universities: Stanford University (Data security and privacy); Massachusetts Institute of Technology, (IT governance and organization, risk management); Georgia Institute of Technology (Software testing); University of California, Riverside (Security networking and data dissemination); University of Wisconsin, Milwaukee (Component-based technologies and web services); Carnegie Mellon University, Pittsburgh (Secure, trustworthy computing and communication systems)

### Community commitment

TCS' North America operations adhere to TCS's global CSR policy and framework of focusing on the following key issues - health, education, the environment and volunteerism. TCS North America has made numerous donations to a variety of cause related organizations in the above areas. Some of these organizations include the American Cancer Society, the Boys & Girls Clubs of America, Habitat for Humanity, Juvenile Diabetes Research Foundation, March of Dimes, Toys R Us Children's Fund, and the National Underground Railroad Freedom Center.

In addition, this year TCS North America is sponsoring the Boston, New York and Chicago marathons. As part of those sponsorships TCS has been raising awareness of diabetes and encouraging TCS runners to raise money to combat this disease. Additionally,



TCS' Cincinnati delivery center is now in its third year of running the goIT program aimed at encouraging local high school students to engage in a computer science education through classroom interactions and a robotics summer camp competition.

## Success Factors

As the largest revenue generating geography, TCS' North America operations were integral to achieving the company's goal of becoming a global top 10 IT services firm. Of TCS' \$6.3 billion USD consolidated revenues for fiscal year ended March 31, 2010, more than 50% was generated in North America and TCS North American clients include 49 of the Top 100 Fortune 500 U.S. companies. TCS' broad portfolio of offerings, solution accelerators, Innovation Labs, Co-Innovation Network, Global Network Delivery Model™ and highly intelligent, knowledgeable associates ensures TCS' continued leadership position.

TCS has established itself as a truly global firm with a diverse employee base. It has strengthened its

human resource base through recruitments and mergers and acquisitions. As on December 31, 2010, TCS had 186,500 employees. The company heavily invests in learning and development programs for its associates, in addition to giving them competitive compensations. It has put in place a well-structured reward and recognition mechanism. This year, TCS aims at recruiting more than 1,000 professionals locally, thus increasing the employee base in the US.

## Future Plans

As the largest geography, North America will continue to play a crucial role in TCS' future plans. The company continues to drive growth across all its service lines. In addition, it is continuing to grow its investments in Ohio and Michigan where it has delivery centers that play a critical role as part of TCS' Global Network Delivery Model. These are part of TCS' continued commitment to the local economy and the creation of new jobs and retention of existing jobs.



TCS supporting the New York City Marathon



## TATA Sons

### Company Background

Founded in 1868, the Tata group is India's oldest and most respected business group with revenues of \$67.4 billion in 2009-10. With over 90 independently operating companies, the Tata group spans seven business sectors including: Information Systems and Communications; Engineering; Materials, Services; Consumer Products; Chemicals; and Energy.



Tata Sons Jaguar Land Rover headquarters



## Global Footprint of Tata Sons

The Tata group has presence in over 80 countries and approximately 395,000 employees worldwide. Several companies such as Tata Consultancy Services, Tata Chemicals, and Tata Steel, rank globally among the largest in their industries.

## Tata Sons in the USA

In the United States, the Tata group is comprised of 11 operating companies with more than 16,000 employees across 40 states. Tata's diverse operations include: soda ash mines in Wyoming; call centers in Ohio and Florida; steel manufacturing facilities in Ohio and Pennsylvania; tea manufacturing and processing in Florida and Georgia; coffee manufacturing in Maryland and hotels in New York City, Boston and San Francisco. Tata's U.S. portfolio includes well-known brands Jaguar Land Rover, The Pierre, A Taj Hotel, Tetley, Good Earth, and Eight o'Clock Coffee. In addition, the Tata group has made investments in several U.S.-based companies, has created several joint ventures, and has two publicly traded companies, Tata Communications and Tata Motors, on the New York Stock Exchange.



Tata Technologies' North American Headquarters, a LEED® Silver Certified building, Novi, Michigan

## Success Factors

Tata's five core values – integrity, understanding, excellence, unity, and responsibility – drive business decisions and are fundamental to its success around the world. Known for its unique business model of returning wealth to the communities in which it operates, 66% of the holding company Tata Sons' equity capital is owned by philanthropic trusts. Adherence to business ethics and commitment to corporate social responsibility has created a legacy of trust in India, which the Tata group brings to its global operations.

## Future Plans

As Tata group companies aggressively expand their international operations, Tata strives to contribute to the economies and communities wherever it operates. Tata will continue to develop new products, offer new services, and establish more development centers. Tata will also continue to forge partnerships with U.S. companies through joint ventures and invest in promising start-ups across a range of sectors.



Tata Technologies Employees enter new building



**WELSPUN**



Dare to Commit

## Welspun Tubular LLC

### Company Background

US\$ 3 billion Welspun Group, is an amalgamation of expertise, resources, opportunities and engineering excellence. With global leadership position in Line Pipe and Home Textiles, its marquee client list includes most of the Fortune 100 Companies operating in Oil & Gas and retail sector like Chevron, Exxon Mobil, Wal-Mart, Target amongst others. Welspun believes in its crucial role of a responsible corporate citizen and sincerely practice empowerment of the underprivileged and sustenance of the environment. Guided by the six 'E's - Enrichment of mind, Enrichment of body, Education, Empathy, Empowerment of Women and Environment sustenance, each and every Welspunite contributes towards the betterment of the community at large.

The Group continues to live by its motto 'Dare to Commit', committing to the most challenging outcome and delivering on promises. The company's motto encompasses the way the organization accepts all challenges and aims to perform exceedingly better than expected. Welspun's logo is a visualization of a flying pair of sea gulls depicting the flight to greater heights at the same time keeping in touch with ground realities.





## Global Footprint of Welspun

With strong foothold in over 50 Countries, over 24,000 employees & 100,000+ shareholders, Welspun is one of India's fastest growing conglomerates.

## Welspun in the USA

**Welspun USA Inc.** – The marketing, sales and distribution arm of Welspun Global brands Ltd. Welspun USA Inc. enjoys relationships with the World's top retail giants and is successful in positioning brand Welspun amongst the largest Home Textiles Companies in the World.

The company is a joint venture of Welspun Global Brands Ltd. & Welspun India Ltd. that provides proximity to the customer for focused brand support, marketing and business development. Strengthened by sales representative organizations, a well endowed showroom in Manhattan, New York and Enterprise Data Interface (EDI) based warehousing

in Grove City, Columbus (Ohio), it is well structured to serve it's customers in the American subcontinent. Additionally by way of strong pre and post sales services vis-à-vis market analysis, imparting product knowledge and enabling customer's inventory management, Welspun retains a foremost position as a most preferred supplier.

**Welspun Tubular LLC** – Adjacent to the Little Rock Port, in Little Rock, Arkansas, is a state-of-art spiral pipe and coating facility, spread across 740 acres and with an annual capacity of 350,000 tons. This facility is a 100% owned subsidiary of Welspun Corp Ltd. One of the largest industrial initiatives in the state of Arkansas, this facility currently employs over 600 highly skilled people, mostly from the local community. The Company recently announced the acquisition of a 44 acre site formerly owned by the Wheatland Tube Company for \$4.25 million dollars. The purchase includes a 350,000 sq ft building on the site, which is currently being used to store stock



Welspun Manufacturing Facility, Little Rock, Arkansas



material of Welspun's pipe and coating facility in Little Rock.

## Success Factors

Welspun has had a long illustrious heritage spanning a quarter of a century and is today poised as one of India's fastest growing conglomerates. No company can reach such a pinnacle without having some guiding principles or values.

The Company has always been known to stand for excellence, its image associated with quality. It has achieved success in terms of its world-class quality and state-of-the-art manufacturing facilities across the globe.

Another determining factor towards the growth of the company is developing innovative technologies for all its products. Being global market leaders in many of the businesses technology plays a vital role in creating world class products. At Welspun, innovative technology brings the product of minds and imaginations to the broadest audience across the globe. We deploy the best available technology in our diversified business to improve the quality of life - both our employees as well as our customers.

The biggest asset of any organization is the 'people'. It is the employees that make an organization

successful. At Welspun, identifying key talent within the organization - training and developing them to their full potential, is a foundation pillar of Welspun's people management philosophy.

## Future Plans

The Welspun Group has been on a roll in the last few years with several new acquisitions and diversifications, venturing into a lot of new areas, not just within the business sphere but also geographies.

With its focus on developing power generation, energy, pipe laying and infrastructure businesses, Welspun hopes to become a fully integrated company, increasing reliability and reducing costs for customers as well. It has also ventured into solar energy projects.

Going forward, the company's long-term goal is to make India energy-independent. Over the next three years, Welspun plans to generate several thousand MWs of Thermal power and 500 MW of Solar power. With things going on schedule, it is going to be a reality. The implementation of L-SAW plant at Anjar is on schedule, and is likely to be commissioned by the end of Q1 FY12. The Mandya plant in Karnataka has started production and is ramping up to achieve desired level of production.





## Wipro Technologies

### Company Background

Wipro Limited was established in 1945 in Bangalore, India. The company started its operations with the manufacturing of hydrogenated vegetable oil. Over the years, it expanded and diversified its operations into various business areas, such as IT products and services, consumer care, lighting products, medical services, infrastructure engineering services, etc.

Wipro Limited has five major business segments – the IT Business (Wipro Technologies and Wipro Infotech), Wipro Consumer Care and Lighting, Wipro Eco Energy, Wipro Infrastructure Engineering and Wipro GE Medical Systems.

In the financial year ending March 31, 2009 (FY2010), Wipro Ltd. generated consolidated revenues of \$6.03 billion, representing an increase of 6% over the same period in the previous financial year. Of this revenue, the IT Services revenues were \$4,390 million, an increase of 1.6% YoY and 1.8% in constant currency. Wipro Ltd.'s equity shares are listed on the Mumbai Stock Exchange and the National Stock Exchange in India and the New York Stock Exchange in the US.

### Wipro Technologies

Wipro Limited started its technology business in 1980. Wipro's IT Business is among the largest global IT services, BPO and Product Engineering companies,



as well as the world's largest independent R&D services provider. Wipro Technologies' services span financial services, retail, transportation, manufacturing, healthcare services, energy and utilities, technology, public sector, telecom and media to name a few. Wipro Technologies has more than 850 active clients that include governments, educational institutes, utility services, and over 150 Global Fortune 500 enterprises. As the world's first SEI CMM Level 5 Company, Wipro endeavors to deliver reliability and effectiveness to its customers by maintaining high standards in service offerings through robust internal processes and people management systems.

## Global Footprint of Wipro Technology

Wipro's IT business has a presence across geographies including North America, Latin America, Europe, Japan, ANZ, ASEAN and India, Africa and the Middle East. Wipro has over 117,000 employees from over 70 nationalities and 72 plus global delivery centers in over 55 countries.

## Wipro Technologies in the USA

In 1992, Wipro established its US headquarters in Mountain View, California. Wipro generates nearly 57% of its total revenues from its US operations. Over the past ten years, Wipro has invested over \$1 billion in the US and currently, Wipro employs 9000 in the US in 95 cities throughout 24 states, including multiple development and data centers in Georgia, Arkansas, New Jersey, Michigan, Nebraska, Arizona, California and Washington State. Through its development and data centers in the US, Wipro brings world class software development, product engineering and business processing capabilities.

Wipro inaugurated a data center in King's Mountain, North Carolina announced in November, 2010. Wipro's subsidiary Infocrossing, a leading provider of IT infrastructure management services, has invested more than \$50 million in this state-of-the-art data center to support its growing IT infrastructure

business. The facility is designed to achieve LEED (Leadership in Energy and Environmental Design) certification. The data center will support all major platforms including mainframe, Windows, Unix, Linux and iSeries and will house the company's cloud computing services.

Wipro's development center in Atlanta, Georgia employs talent to enable serving the clients in the US and globally. In Atlanta, Wipro has established a working relationship with the local community and become one of the city's largest job creators, with more than 500 employees. Eighty percent of those employees are US citizens. In Georgia, Wipro works closely with the local colleges and universities such as Georgia Tech, University of Georgia, Emory University and Georgia State to recruit new college grads to the Wipro ranks.

Additionally, Wipro provides jobs to a small pool of veterans through its veteran recruitment program. On December 21, 2010 Wipro received the Patriot Award from the U.S. Department of Defense for its support of employees serving in the Georgia National Guard and Army Reserve.

## Success Factors

### Unique blend of solutions

The challenge for companies worldwide is to introduce new winning products/services to gain market share while increasing productivity and reduce capital investments. Wipro has a unique blend of services which complement each other - IT Services, BPO and Product engineering services in order to deliver innovative solutions to our clients.

### Strategic Acquisitions

Wipro Ltd. has acquired US-based companies such as NerveWire, mPower Software Solutions, cMango, Quantech Global Services and Infocrossing, which later became part of Wipro Technologies. These acquisitions enhanced its domain expertise and technical knowledge, added new service lines, expanded its client base and strengthened its



presence in existing and new geographic locations.

### Focus on Technology

Wipro provides a wide range of high-end IT services which include IT consulting services, system integration services, technology infrastructure services, package implementation services, and R&D services. Wipro's strong emphasis on technology and its rapid technical development in line with changing market requirements have been instrumental in ensuring the company's success.

### Global delivery Model

Wipro's global delivery model is one of the contributors to its success in the US. With this model, Wipro delivers its high-tech IT and BPO services at a competitive cost to its global clients. Following this model, the company has developed offshore and onshore centers in order to integrate its technical expertise and project management skills and

leverage its advanced tools, processes and robust infrastructure for timely delivery.

### Future Plans

Wipro continues to set up centers and recruit people in new geographies. The company, combining its global expertise with local knowledge, is helping clients to expand in these regions. Wipro will leverage 'cloud' to deliver solutions and has already launched a number of cloud-based solutions to help clients move from a capex intensive operating model to opex business model. Example: Mortgage solution, Hospital management solution. Wipro will continue to provide sustainability solutions in the areas of Green IT, IT for Green and Green Services. In the US, Wipro's data center in King's Mountain, North Carolina announced in early November, 2010 will create indirect economic activity and jobs in the region. Wipro intends to duplicate the Atlanta development center model in at least two other US locations in the near future.





## Zee TV Americas

### Background

Zee TV – the name that has become synonymous with unparalleled quality in entertainment – has been a dominant player in broadcasting content for more than 17 years in the national and international space.

### Global Footprint of Zee TV

With a reach of more than 167 countries and more than 500 million viewers globally, Zee has established a powerful brand equity and media franchise serving the South Asian Diaspora

### Zee TV in the USA

In July 1998, Zee TV expanded its presence in the international space by bringing home away from home to South Asian viewers in the United States and today is available on all major platforms such as Dish Network, Comcast, Cable Vision, Charter, Cox, Insight, RCN, Verizon Fios, ATT , Time Warner Cable to name a few. Today, Zee reaches more than 2 million viewers. As the undisputed leader in the market for over 12 years, Zee TV has pioneered the space with many firsts attached to its name:

- Zee was the first South Asian Channel to be launched in the US
- The first to launch Zee Carnival – a three day star studded ground event
- The first to venture into localized content/programming
- Zee was first South Asian Network to launch in cable
- The first channel to be Nielsen rated
- Helps bringing the community together through nonprofit initiatives and local causes
- Obtains more than 10% of the total viewership across all international viewership

Zee TV has consistently invested back in the economy through various initiatives such as research (Nielsen, Simmons & Rentrak), local events, non- profits initiatives, revenue growth in all key cable and satellite platforms.

## Community Involvement

Zee TV Americas has been helping bring the community together through nonprofit initiatives and local causes since its inception in 1998.

Zee has been involved with several community outreach events and partnered with organizations such as NABC (North American Bengali Conference) and AKKA (Association of Kannada Kootas of

America), Punjabi Heritage Society, India Association of North Texas, Rajasthan Association of North America.

Zee has also worked with nonprofit organizations not only collaborating with them but also providing advertising relief support to CRY America (Child Relief and You) and the Nargis Dutt Memorial Foundation, The Shankara Eye Foundation, SOS Children’s Villages, The Hindu Temple of Washington, The Radha Madhav Society, The Jain Association of America, The Punjabi Cultural Society of New Jersey, and helped these groups gain visibility for their causes.

## Success Factors

Zee TV has successfully evolved its content to meet the changing needs of the market across genres and languages. The network caters to a wide audience with a growing number of channels, including Zee Cinema, Zee Sports and Alpha ETC Punjabi. The popularity of Zee comes from its understanding of South Asian culture and beliefs, which are depicted in its programming. That is the reason why Zee commands more than 60% viewership share in the South Asian space.

Today Zee serves as a one stop shop for all South Asian entertainment; be it gripping dramas, engaging reality shows, top rated Bollywood movies or special events! Zee’s constant goal is to launch initiatives in order to have maximum interaction with their viewers.





Zee TV's efforts in the America's are led by Subroto Bhattacharya as the Country Head with a strong team of 27 full time employees which constitute the Affiliate Relations, Ad Sales, Marketing, Programming, IT and Accounting departments.

These milestones have been fueled by constant

investments in the latest in technology, research, newer distribution platforms and partnerships, exceeding worth of \$200 million. Dish Network, Comcast, Verizon, ATT and Time Warner Cable have been experienced tremendous growth in their international offering and package.





## Zensar Technologies, Inc.

### Company Background

Zensar Technologies (Zensar) is a globally renowned software and services organization that specializes in providing a complete range of IT Services and Solutions. Zensar is ranked amongst India's top 20 software companies by NASSCOM and is also recognized by the Department of Scientific and Industrial Research (DSIR) for its robust in-house Research and Development practices and an acknowledged leader in Innovation. The services range from the traditional to the transformational – enterprise product implementation and hosting, business intelligence and data warehousing, collaboration and knowledge management services, business process outsourcing and optimization, remote infrastructure management and testing, and the entire range of applications planning, portfolio building, development, migration and support. With over 6000+ associates and 300+ customers, Zensar helps transform global corporations.

### Global Footprint of Zensar Technologies

With over 6000 associates and 300-plus customers, Zensar is the world's first enterprise-wide SEI CMM Level 5 Company and enjoys a strong presence in the United States, Europe, Africa, Middle East and Asia-Pacific regions. The United States accounts for over 65% of Zensar's revenue and is of high strategic importance for the organization. Zensar's US operations started off





in 1991 and is currently headquartered at Oak Brook, IL – Chicago; With operations spread over 20 states and marketing offices in three locations - San Jose (CA), Princeton (NJ) and Dallas (TX). Zensar currently has over 450 associates working at different customer locations throughout the US.

Zensar recently acquired Akibia Inc (Akibia), a niche service provider in the Infrastructure Management segment (IM) to augment its IM service offerings in the US and Europe regions. With this acquisition, Zensar has doubled its onsite strength to over 800 associates and services spread across 38 states.

## Clientele

Zensar enjoys enduring relationships with global leaders like Cisco, Assurant, Danaher Corporation, Electronics Arts and Logitech, among several others. Zensar's customers are spread across various industry segments like Manufacturing, Retail, Banking and Insurance, High-Tech manufacturing and Connected Services. Zensar has evolved from an implementation partner of enterprise business solutions to a Platinum Partner in the Oracle® Partner Network providing customized solutions to meet industry demands better.

## Current Strength and Future Projections

The strong focus that the organization has on continuous innovation, customer sovereignty and people orientation, Zensar has been able to demonstrate extraordinary growth and excellent business results. In the years ahead Zensar's focus and high growth strategy will place the organization among the top contenders for large deals in the IT and BPO sectors globally. While Zensar's intakes from all key global markets today is stronger than ever, the growing adoption of IT and BPO in the domestic

market has also opened up various opportunities for the organization. The opportunities in non-linear intellectual property-based models for retail and healthcare, the ability to reach out to underserved segments of the manufacturing industry through hosted solutions on a SaaS model and the vistas of opportunity that the rapid advances in cloud computing have brought in - all these and more will be key additions to the Zensar services portfolio in the coming year.

The strength of Zensar is the energy of our teams; the Harvard Business School case study on Zensar's Innovative Vision Communities is recognition of this commitment. Zensar has been chosen by SAP, Oracle and Microsoft, as their partner in many key markets and the organization is in the process of redefining the strategic imperatives for our business in the years ahead and looks to the future with great confidence.

## Social Responsibility

At Zensar, we believe in creating an inclusive society within and around us and strive to make a positive contribution to the underprivileged communities by supporting a wide range of socio-economic, educational, health and environment initiatives, many of which are driven by active participation from our people. The Zensar Foundation has been implementing these initiatives for over five years now and is in its next phase of growth, consolidating its operations and creating a comprehensive model, which will include primary education for children and skill enhancement and development among youth to make them employable.

The Foundation's vision going forward is to leverage technology in education and build a strong case of public private partnerships (PPP) by working together with different groups to strengthen the knowledge eco-system across levels –right from primary schools to colleges.









The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the growth of industry in India, partnering industry and government alike through advisory and consultative processes.

CII is a non-government, not-for-profit, industry led and industry managed organisation, playing a proactive role in India's development process. Founded over 115 years ago, it is India's premier business association, with a direct membership of over 8100 organisations from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 90,000 companies from around 400 national and regional sectoral associations.

CII catalyses change by working closely with government on policy issues, enhancing efficiency, competitiveness and expanding business opportunities for industry through a range of specialised services and global linkages. It also provides a platform for sectoral consensus building and networking. Major emphasis is laid on projecting a positive image of business, assisting industry to identify and execute corporate citizenship programmes. Partnerships with over 120 NGOs across the country carry forward our initiatives in integrated and inclusive development, which include health, education, livelihood, diversity management, skill development and environment, to name a few.

CII has taken up the agenda of "Business for Livelihood" for the year 2010-11. Businesses are part of civil society and creating livelihoods is the best act of corporate social responsibility. Looking ahead, the focus for 2010-11 would be on the four key Enablers for Sustainable Enterprises: Education, Employability, Innovation and Entrepreneurship. While Education and Employability help create a qualified and skilled workforce, Innovation and Entrepreneurship would drive growth and employment generation.

With 64 offices and 7 Centres of Excellence in India, and 7 overseas in Australia, China, France, Singapore, South Africa, UK, and USA, and institutional partnerships with 223 counterpart organisations in 90 countries, CII serves as a reference point for Indian industry and the international business community.



CII launched the India Business Forum (IBF) on 23 June 2006 in USA. IBF is a group of leading Indian companies that have operations in the US.

The objective of establishing this Forum is:

- To share information on the activities and contributions of Indian industry in the US with key stakeholders in the US economy, government and administration
- To raise business issues and concerns faced by Indian companies with concerned authorities in both US and India
- To promote the activities and ongoing businesses of member companies in the US
- To encourage bilateral trade and investment between US and India
- To Build 'BRAND INDIA'

Members of the Forum have the opportunity to interact regularly with US Administration officials, members at the Capitol Hill, think tank community, academic universities and other policy organizations. It provides an organized platform for members to express and represent their views and opinions on areas of trade, commerce, services and other related issues. In addition, the India Business Forum also provides opportunities for members to meet with the Indian government officials and CII business delegations visiting the U.S. on an organized basis. CII runs similar initiatives in Singapore, South Africa, China and the United Kingdom as well.

### Confederation of Indian Industry

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