



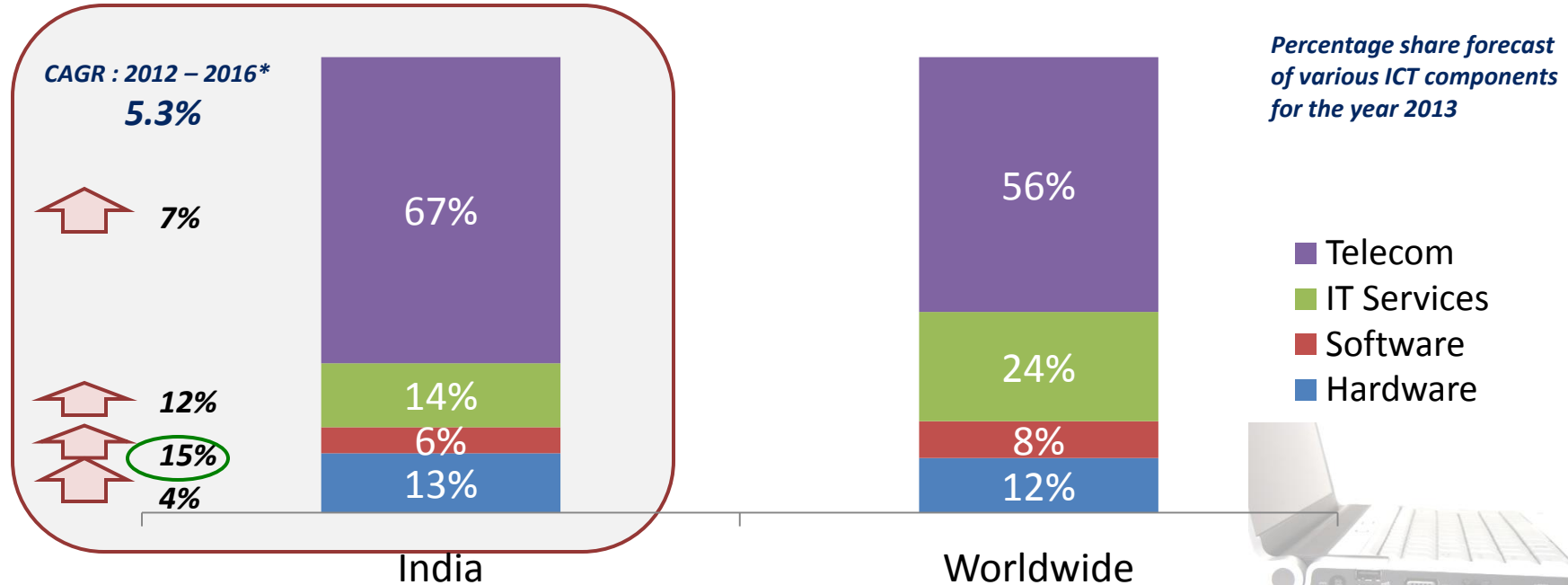
# AZUL<sup>★</sup>

Research **Advisory** and Support Services

## Research in IT & Telecom...

# The Context : Size and Growth in ICT

- The ICT market in India is valued at \$ 66.4 billion in 2012 (expected to increase to \$71.5 billion in 2013 and \$78.5 billion by 2014)
  - Growth rate of **7.7 per cent**, against **5% per cent** growth rate, globally



\* Projections; Various Sources

# Opportunities in the ICT Market

- ICT spending in India **approximately 2%** of the overall global ICT spend
- Telecom
  - Telecom contributes to approximately **3% of India's GDP**
  - Integration of devices and services leading to consolidation in devices and new device players
  - NTP (National Telecom Policy) planning to connect 250,000 Indian villages by optical fibre network will improve reach, and provide broadband level internet capability
- Big data provides \$1 bn opportunity in analytics software, computational platforms and services
- Digital marketing marked by innovation in search engine optimization, search engine marketing and mobile marketing

# Growth Drivers for the ICT industry

## Telecom

- Indian consumers' demonstrated love for designer mobiles, mobile games and music
- Rural India is still an underpenetrated market
- Government initiative for better broadband access
- Integration of devices and services

## IT Services

- Cloud computing
- Virtualization and Data Centers
- Big Data & Analytics
- Infrastructure Management
- Engineering R&D around IT services

## Software

- Business Intelligence
- Continued deployment of Banking software across PSU banks
- Sustained deployment of Enterprise software
- SMEs (Small and Medium Enterprises)

## Hardware

- Increasing prosperity in Tier 2/3 cities and Rural India
- SMEs (Small and Medium Enterprises)

# Azul Services & Solutions for ICT

## Market Sizing

- Overall and by industries (viz. BFSI, Discrete Manufacturing, Process Manufacturing etc.)
- Entire segment or a component (e.g. 3G market in India)

## IT Spending

- Year – on – Year spends (Quantum, Growth and Break-up)

## Shipment figures

- For Devices, Notebooks, Servers, Printers etc.
- Shipment tracking quarter-on-quarter

## Channel Research

- Telecom (Mobile handsets, SIM distributors)
- Hardware (PCs, Notebooks, Printers, Servers etc.)

## User Wants and Needs Studies

- Across sectors and segments

## Concept Research

- Across sectors and segments

# Research Tools Used

B2B

Expert Interviews



Structured Interviews with IT/Telecom Managers:

- a) F2F
- b) Online
- c) Telephonic

B2C

Mystery Audits  
(Retail)

- a) Product audit
- b) Merchandising audit

Focus Groups



Analytics



# Clients : IT & Telecom



STRATEGYANALYTICS  
INSIGHTS FOR SUCCESS



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