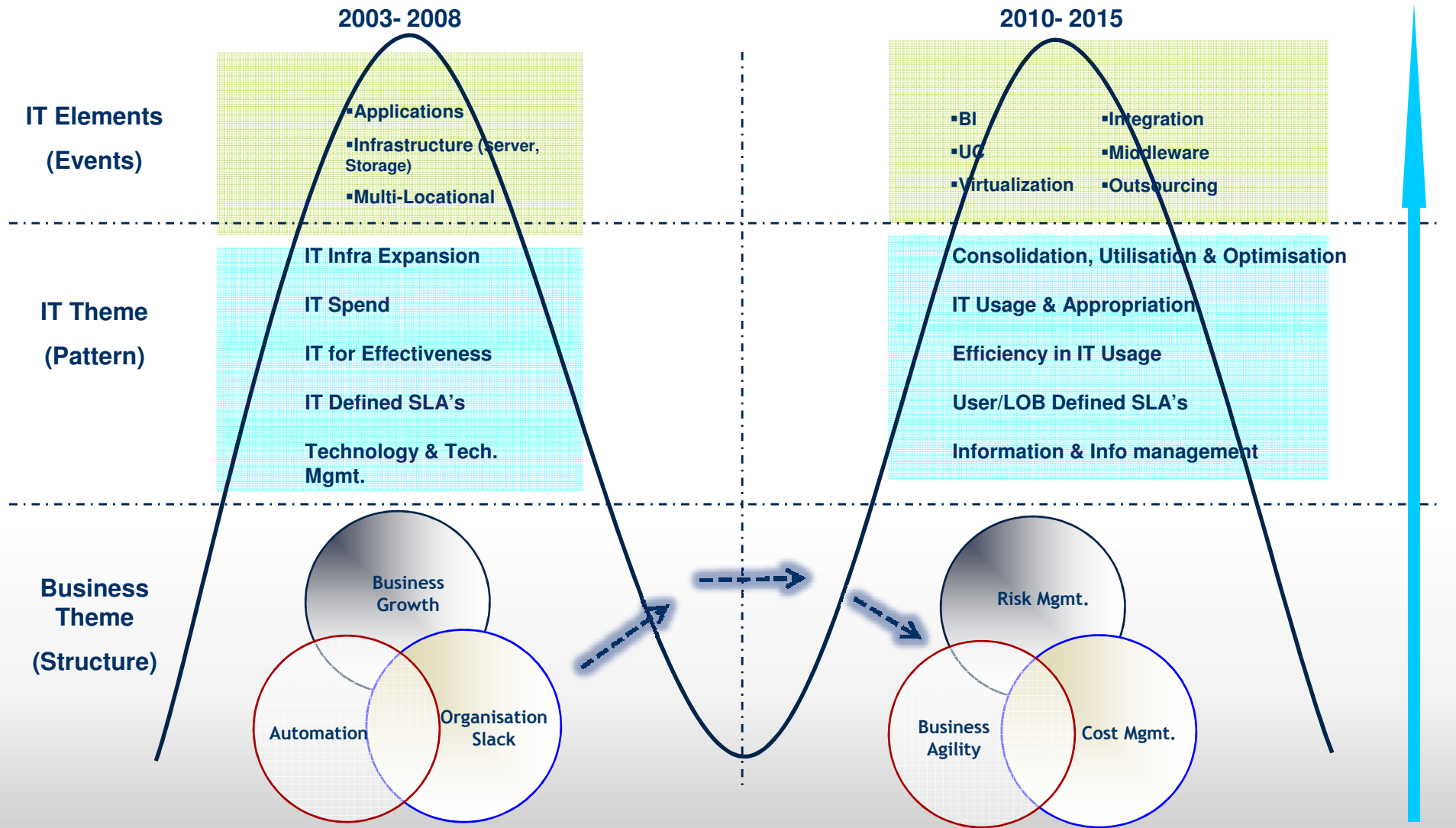
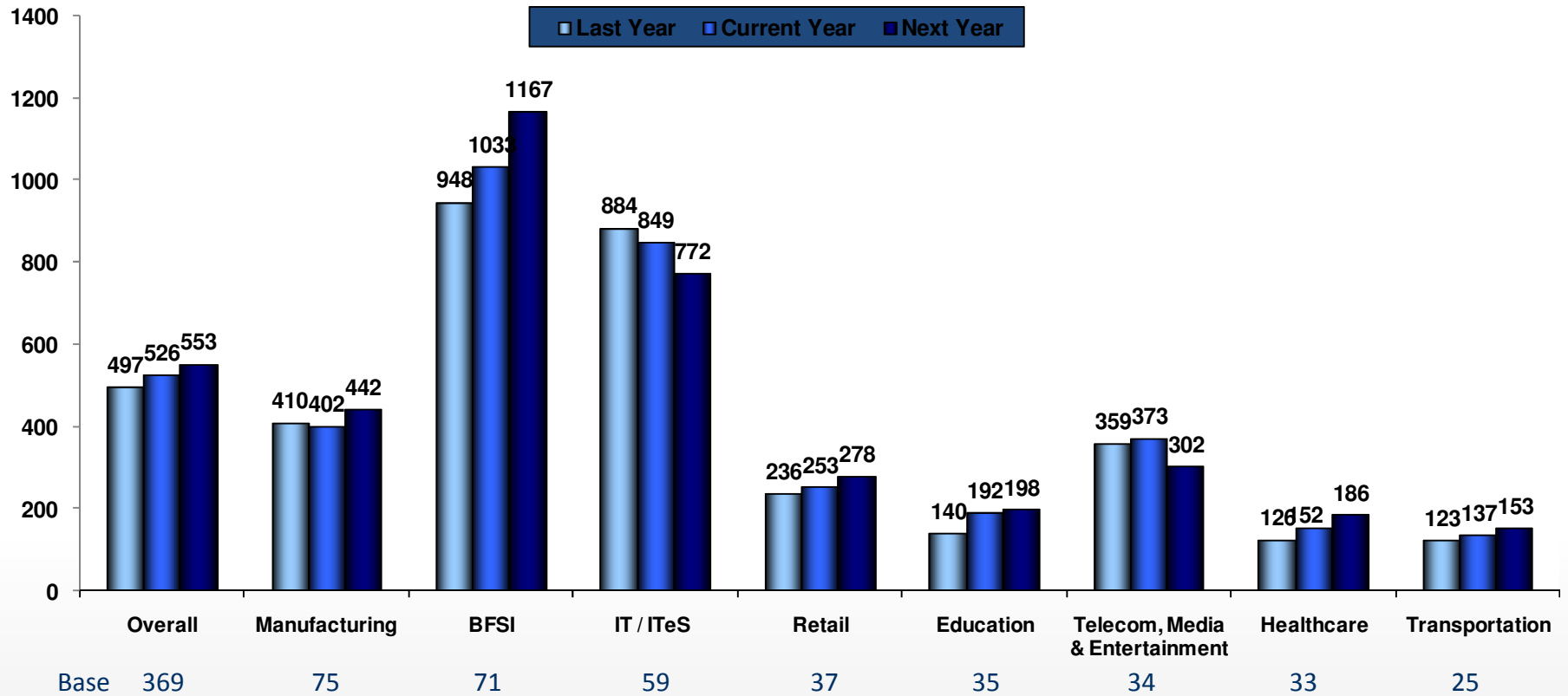


Structural Shifts



Average IT Spend (Rs Lac)

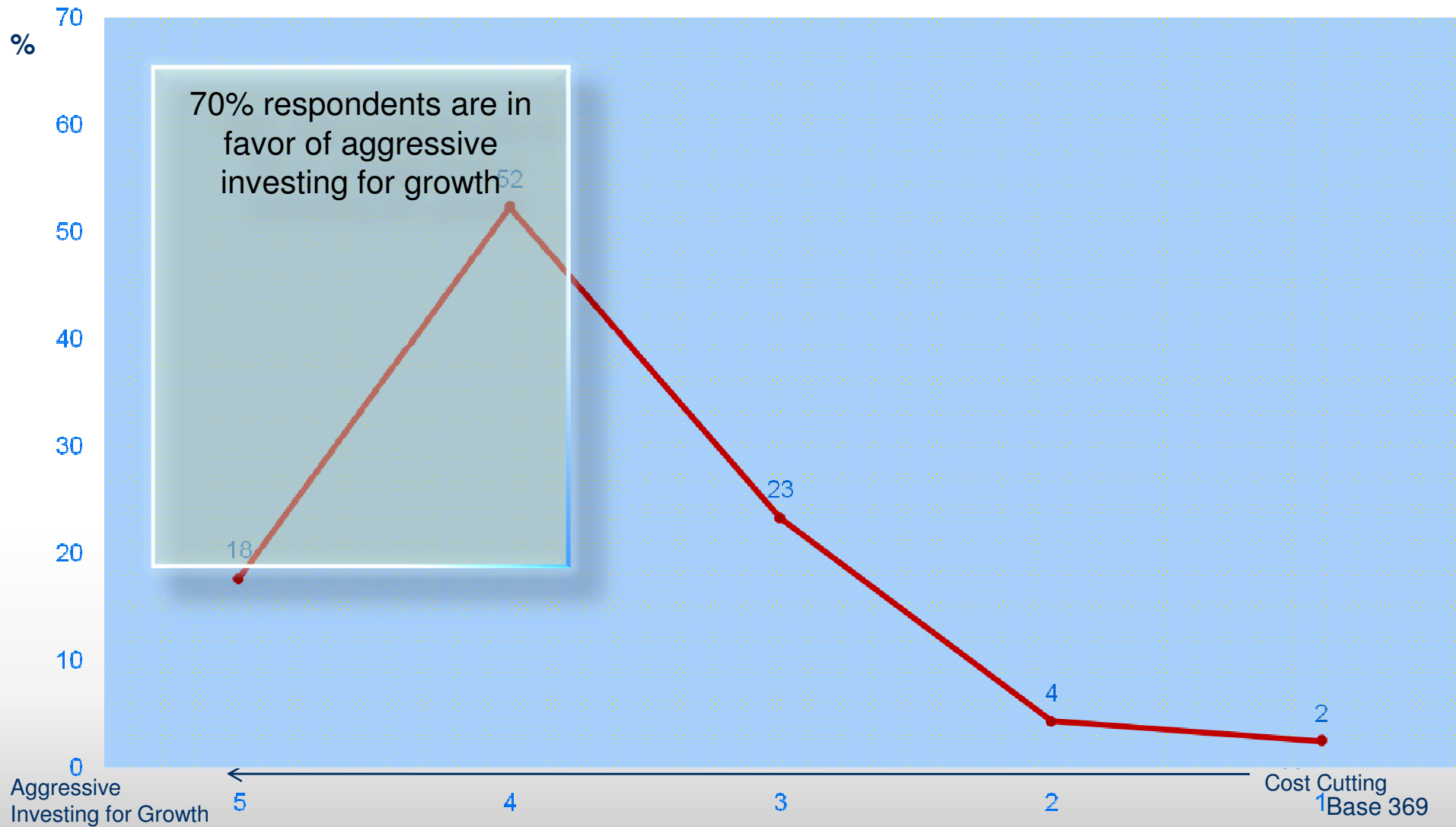


Trend in IT Spend

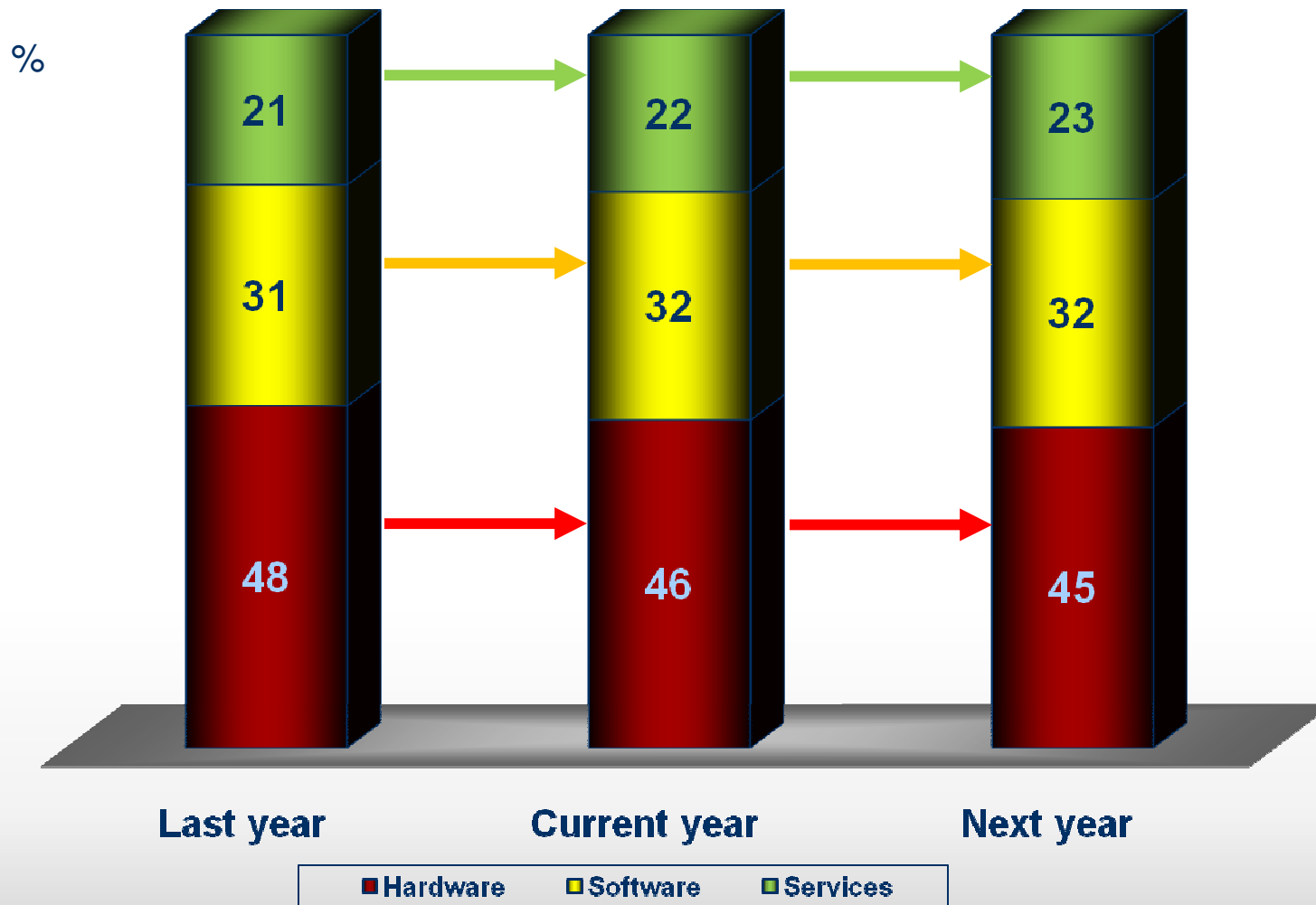


	IT Budget (2013 – 14)	Expected Budget (2014 – 15)
Overall	+ 6%	+ 5%
Manufacturing	- 2%	+ 10%
BFSI	+ 9%	+ 13%
IT / ITeS	- 4%	- 9%
Retail	+ 7%	+ 10%
Education	+ 37%	+ 3%
Telecom, Media & Entertainment	+ 4%	- 19%
Healthcare	+ 21%	+ 22%
Transportation	+ 11%	+ 12%

Mindset of IT Spending



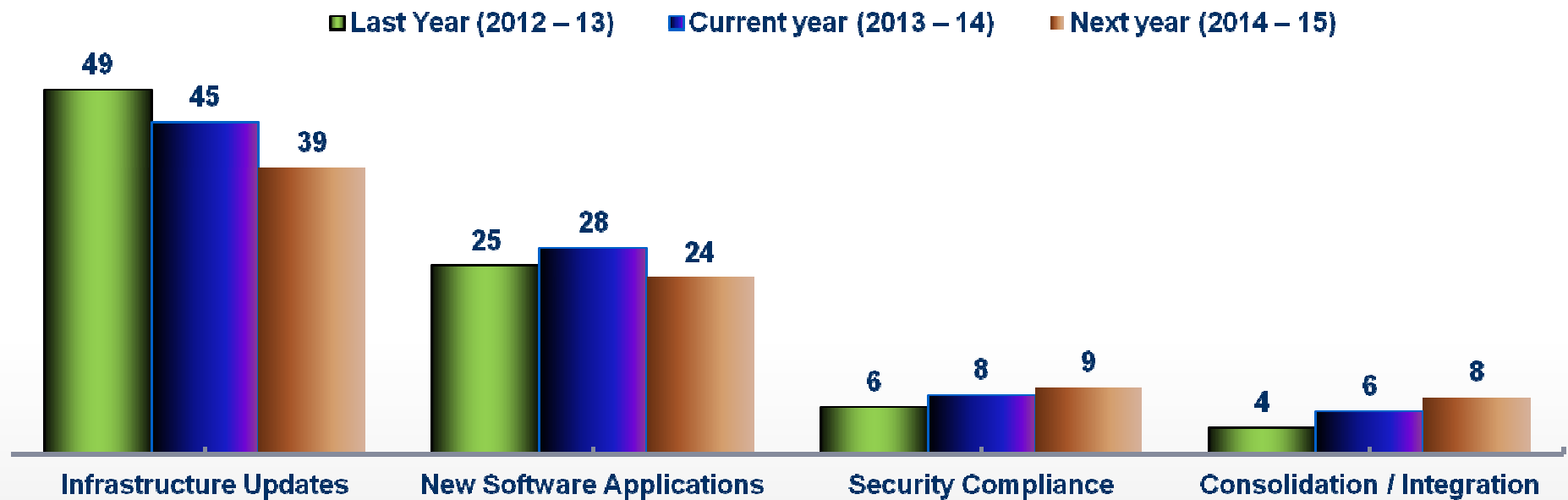
Break-up of IT Spend



Base 369

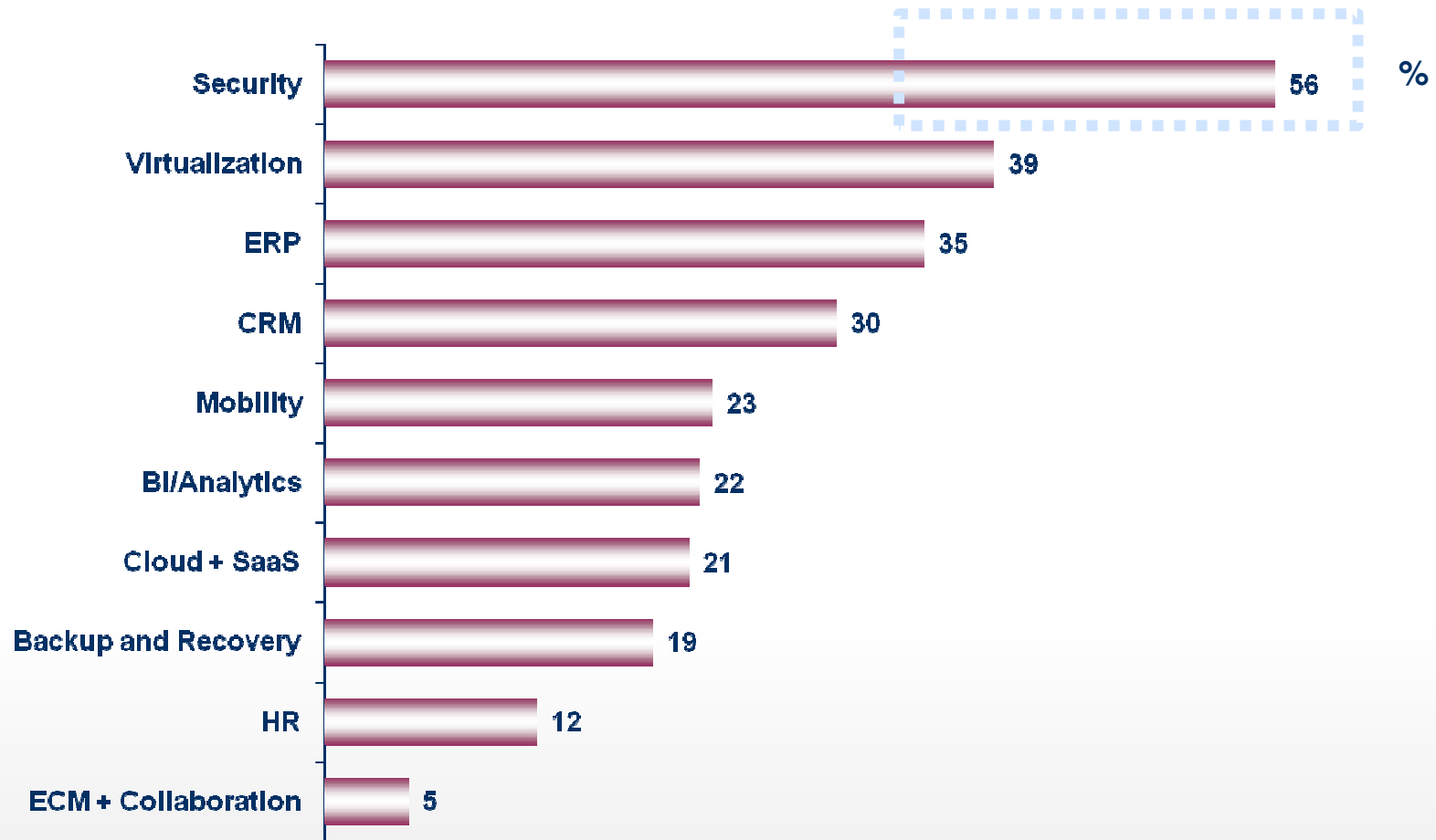
Focus of IT Department

Primary Focus of IT Department



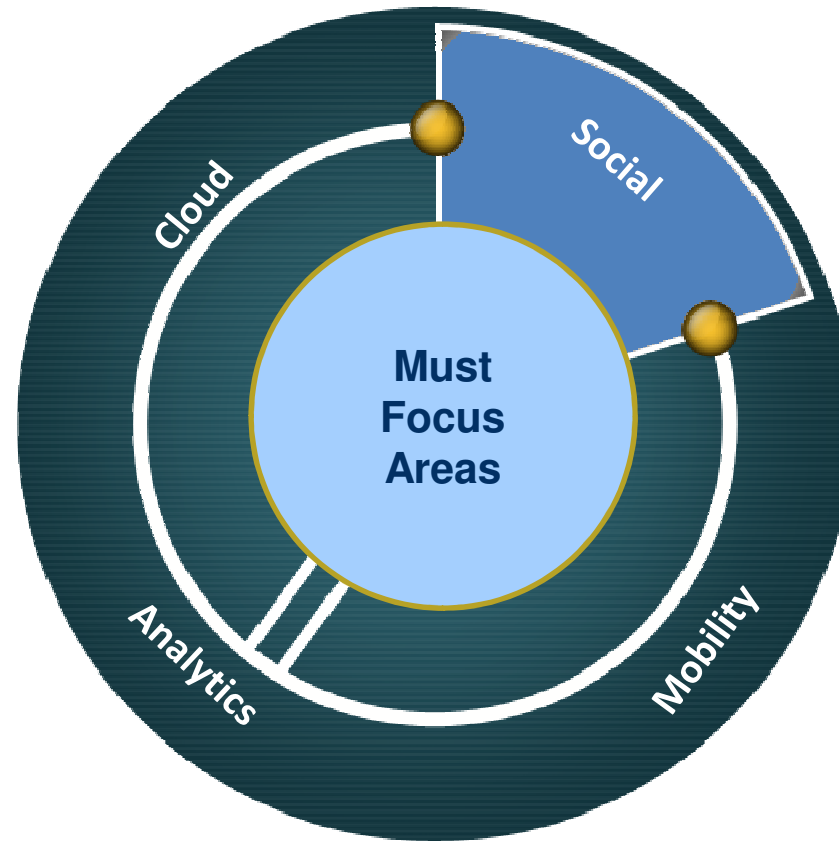
Base:- 369

Top 3 external IT spending projects – largest % increase in spending

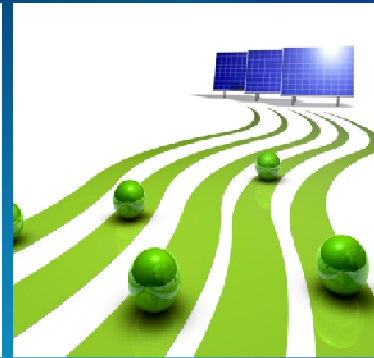


Which 3 external IT spending projects will see the largest % increase in spending in current year 2013-14?

Base 369

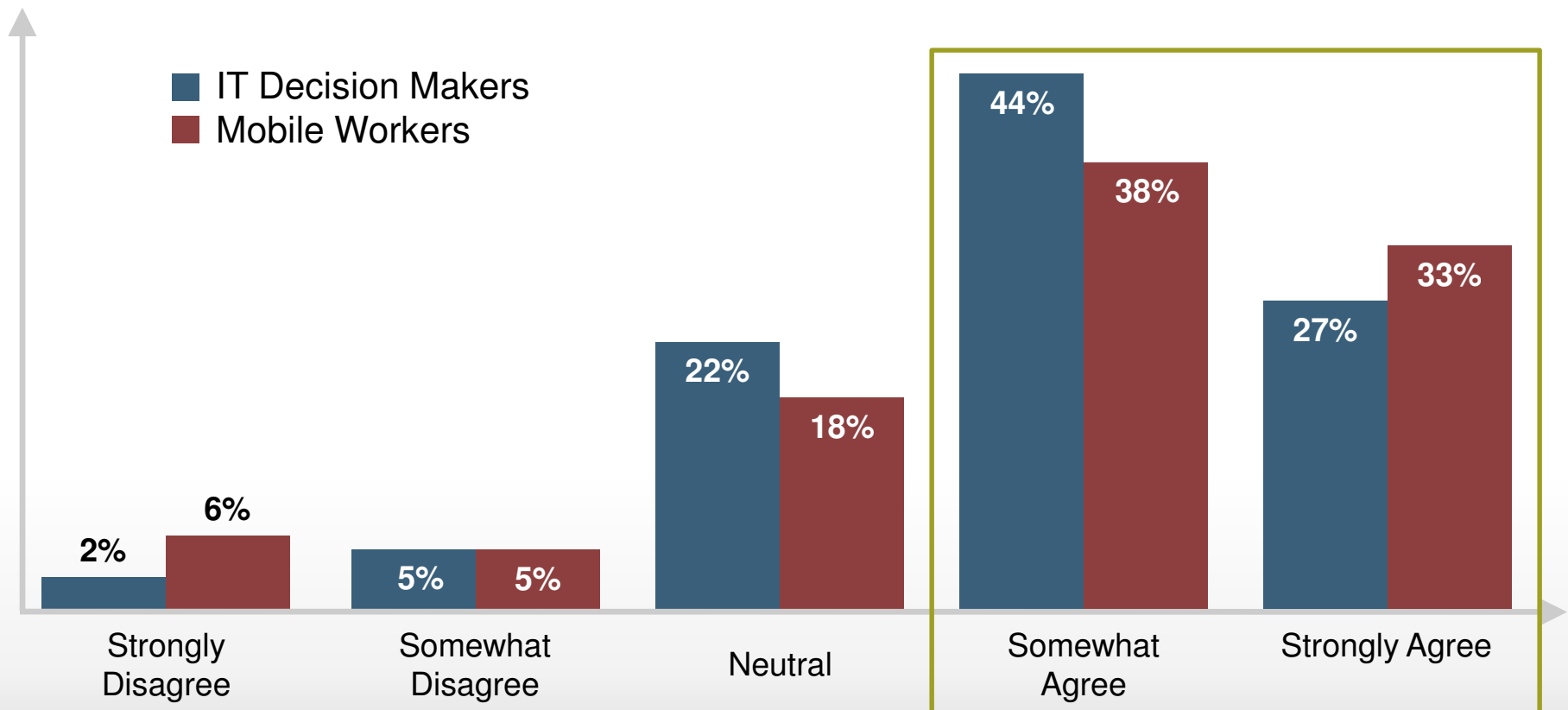


2) Mobility



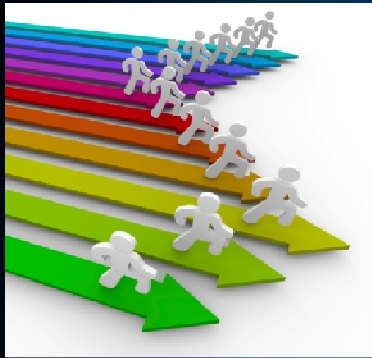
Mobility Continues to Rise in Importance

Q: “Mobile technologies are more important to my organization today than they were last year.”



An overwhelming majority (71%) of decision-makers and mobile workers stated that mobility is more important to their enterprise today than it was in 2010.

4) Cloud Computing



No more a buzz word

CRM & Collab Apps most popular apps on public cloud

Adoption Workloads

Core business applications	Enterprise resource management	Financial applications	Payroll	Business Intelligence	Product lifecycle management
		Project management	CRM applications	Human capital management	Engineering applications
	Supply chain management	Product planning	Inventory management	Procurement	Logistics
	Collaboration applications	IP Telephony	Messaging applications	Conferencing applications	Contact centre applications
	Content applications	Web content management	Document management solution	Authoring applications	Web analytics
Development & Integration tools	Application development, deployment	Development tools	Integration, deployment tools		Development Platforms
Infrastructure management	Security management	Identity access management	Endpoint Security	Messaging & Web Security	Vulnerability management
	Storage management	Backup archival software	Storage resource management	File system software	Storage replication
	System management	Change, configuration management	Performance management	Event automation	Network & service management

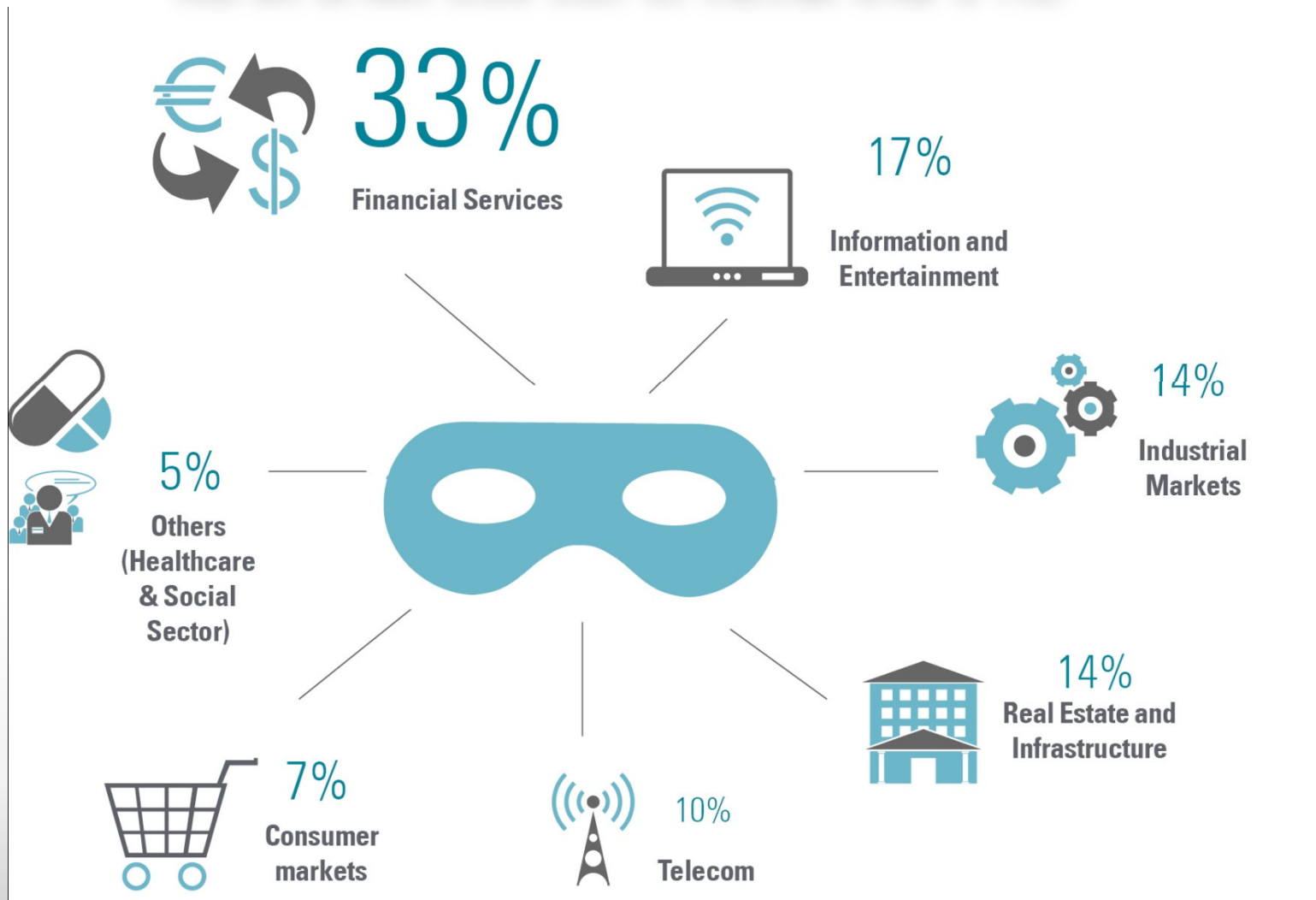
 Unlikely to adopt in near future

 Likely to adopt in next 1-2 years

 Current Adoption

Sectors perceived as most vulnerable to fraud

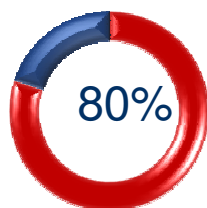
Financial services sector faces the maximum threat of fraud



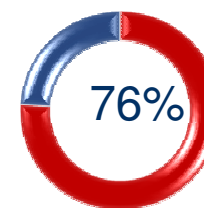
Emerging E-Risks

Preventing cyber crime is difficult due to the **technological complexities** involved and the **large population** that needs to be controlled.

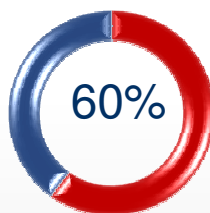
Cyber Crime on exponential rise



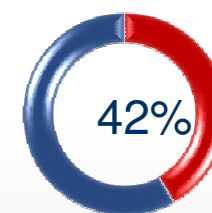
Data Theft



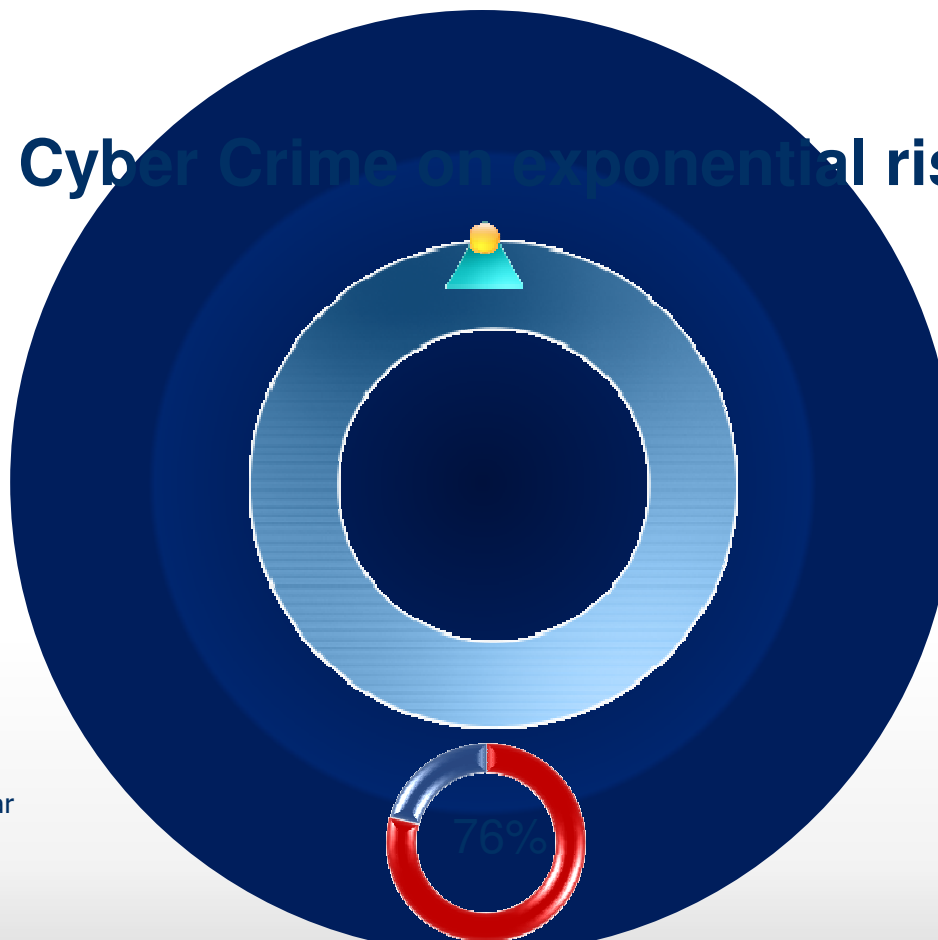
Virus & Malware



Malicious emails and smear campaigns



Defacement of company website



Network Intrusion/Hacking

BFSI sector early adopters of technology

Improve
operational
efficiency

Minimise
costs

Enable
high-speed
processing

Allow data
capture and
data mining

Improve customer experience with enhanced internal
efficiency

Why is Information Security a Board Room Agenda?

Information Security needs multidimensional discipline approach

**Business
implications**

**Global
threat of
cybercrime**

**Changing
profile of
our
employee**

**Risks
associated
with
outsource
partners**

**Need to
consider**

People, Processes, Technology

Third parties, suppliers, Outsourcing

Regulatory environment



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