Global Infrastructure Management Business

Update

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20th February, 2013

RPG

ZenSar
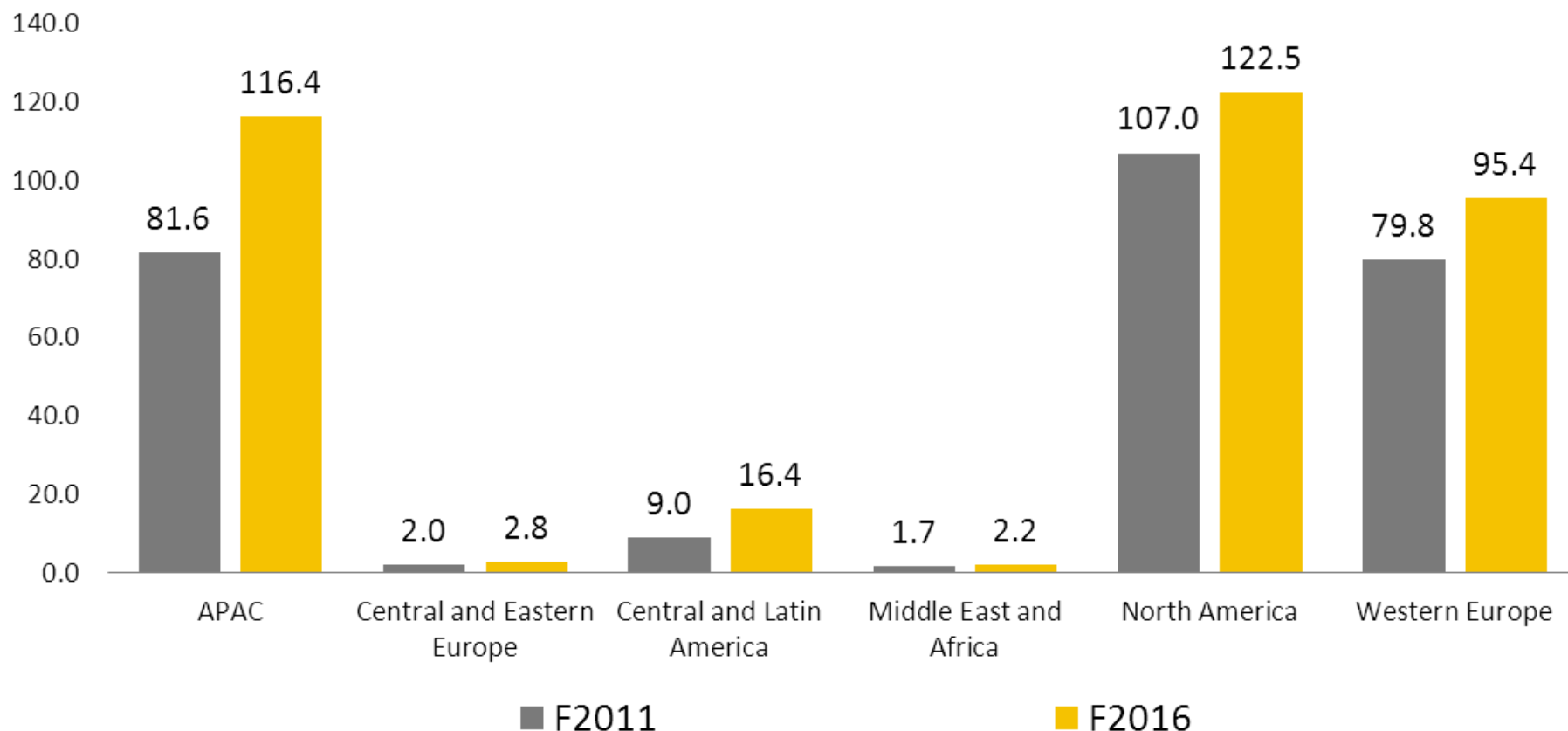TECHNOLOGIES
Your Transformation Partner

Agenda

Industry View

Year 1 (FY12) – Integration

Year 2 (FY13) – Consolidation
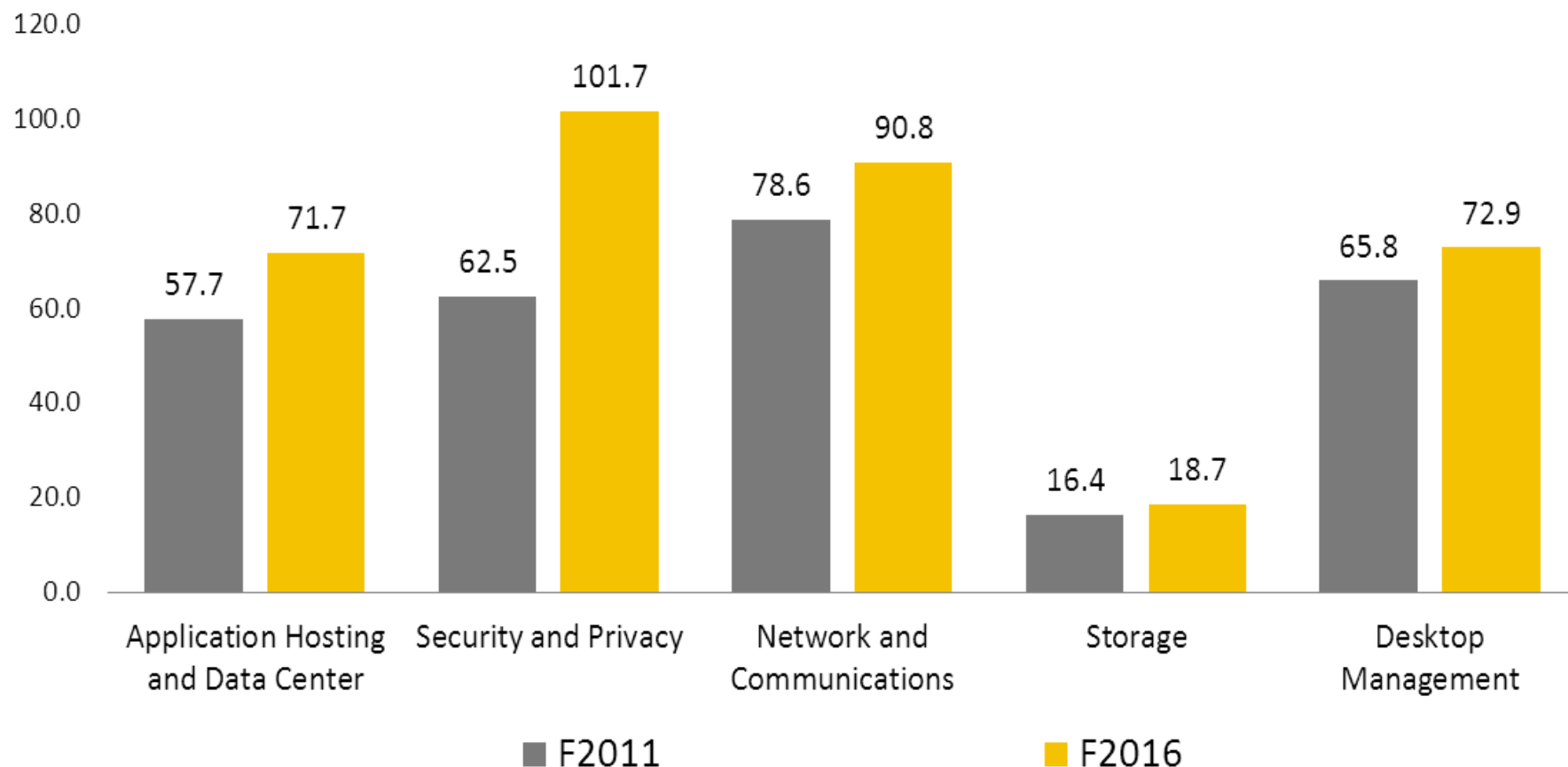
Year 3 (FY14) – Leveraging

Global IM Opportunity - By Geography

Market Size : $269B in 2011, $355B in 2016

Source: Ovum

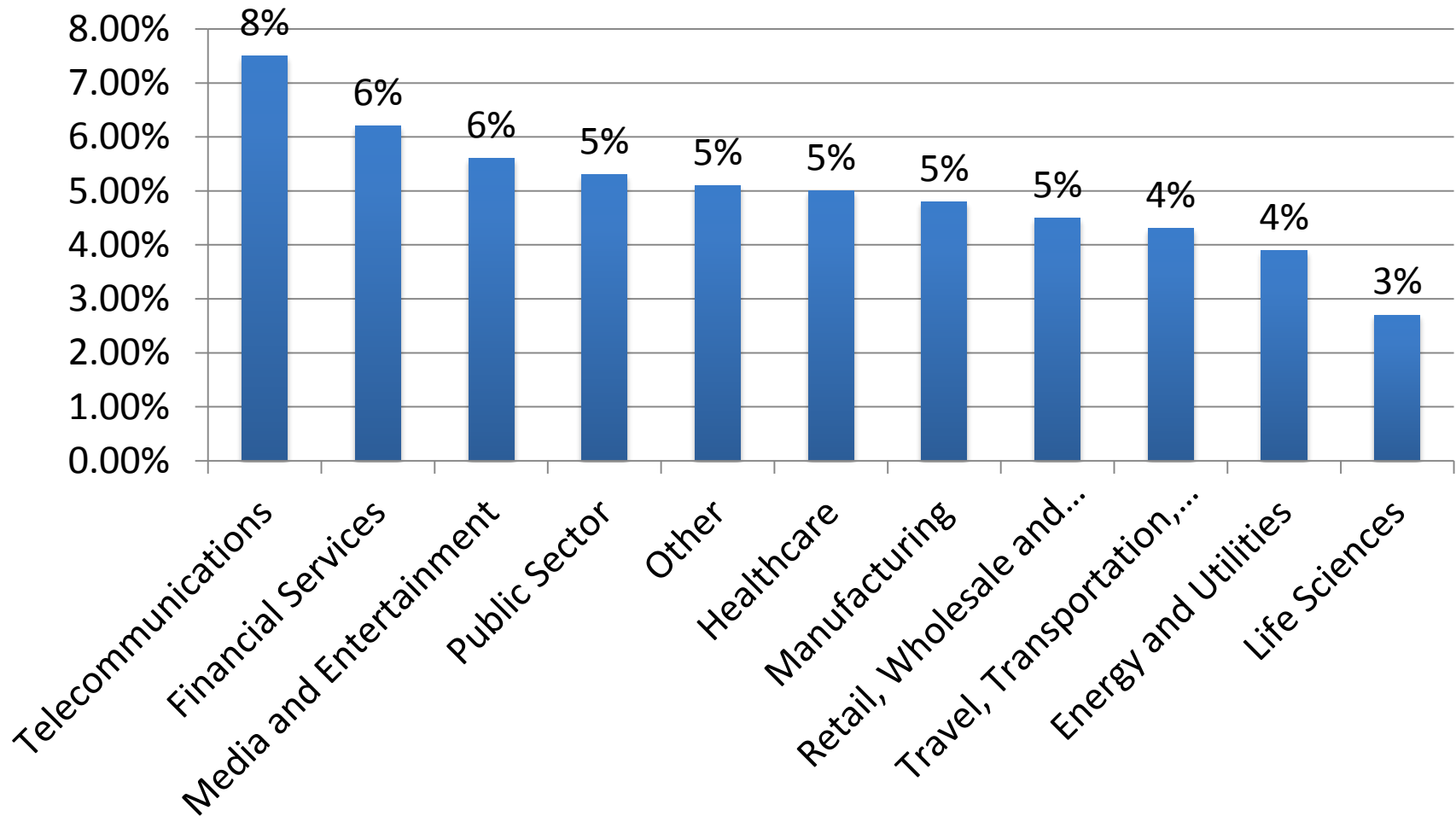# Global IM Opportunity - By Service

Market Size : $269B in 2011, $355B in 2016

Source: Ovum

CAGR (2011-2016) Growth for IM Services Demand

Chart: Bar chart showing CAGR (2011-2016) Growth for IM Services Demand by vertical:
- Telecommunications: 8%
- Financial Services: 6%
- Media and Entertainment: 6%
- Public Sector: 5%
- Other: 5%
- Healthcare: 5%
- Manufacturing: 5%
- Retail, Wholesale and...: 5%
- Travel, Transportation,...: 4%
- Energy and Utilities: 4%
- Life Sciences: 3%

Source: Ovum's Global IT Services Forecast Model – June '11

Zensar Akibia Integration

Zensar

- RIMS & Service Desk
- Shared Services
- ITIL Process Consulting
- Exchange Migration
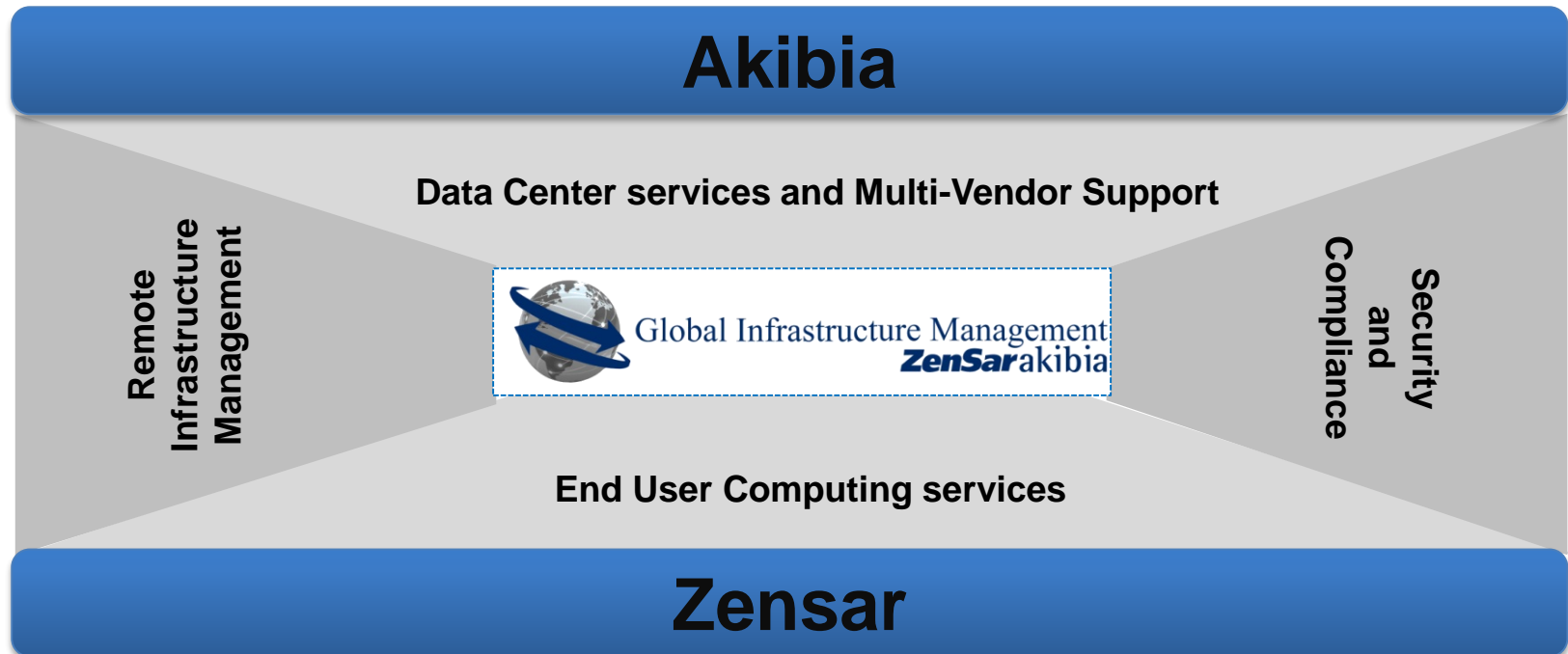- Network
- Server & Storage
- Database & Messaging

Integrated Story

Akibia

- Multivendor Data center support & maintenance
- OEM Alliances
- Risk & Compliance management
- Network Security solutions

Only 50-70% service spectrum covered

Only 40-50% service spectrum covered

Strategic Objective

To achieve $400m Revenue from IM by FY17

Akibia

Remote Infrastructure Management

Data Center services and Multi-Vendor Support

Global Infrastructure Management
ZenSarakibia

End User Computing services

Security and Compliance

Zensar

The Integration focus in FY12

- Crafting the complete services portfolio

- Cross selling

- Going after large deals

- Building a seamless Global IM business

- Common branding

The Integrated IM Services Portfolio

	Data Center	End User Computing	Security and Compliance	RIMS
Consult	**Modernization** ▪ Assessment ▪ Planning ▪ Design	**Assessment** ▪ Win 7 and Virtualization ▪ Application Discovery ▪ Compatibility Analysis ▪ VDI and BYOD	▪ Compliance planning & Audit ▪ Gap and Remediation ▪ Program Assessment ▪ Vulnerability & Penetration Testing ▪ BC/DR Planning	▪ Infrastructure Readiness ▪ ITIL Process Consulting ▪ Project and Program Management ▪ Cloud Migration
Integrate	Consolidation Migration Relocation	**Desktop Transformation** ▪ BYOD & MDM ▪ Windows 7 Migration ▪ Application Packaging ▪ Desktop Virtualization ▪ Application Virtualization ▪ Desktop as a Service		▪ Remote Integration ▪ Backup and Recovery
Support	**Operations** ▪ Monitoring ▪ Maintenance	**Operations** ▪ EUC Service Desk ▪ Desktop Support ▪ VDI Support ▪ Mobile Device Support	**Service Desk**	**Global Command Center Service Desk**
Manage	**Systems and Applications** ▪ Consulting ▪ Integration ▪ Support ▪ Management	**Workplace Management** ▪ Enterprise Desktop Tool ▪ Asset and License ▪ Software Release Management	**Assured Compliance and Managed Security** ▪ SIEM ▪ Firewalls ▪ IPs ▪ Web Filtering **SOC Services**	**Remote Admin and Monitoring Support** ▪ Server ▪ Messaging ▪ Database ▪ Storage ▪ Application Performance

Current year (FY13) - Consolidation

- Focus on large deals (long lead times)

- Launch of "Total Infrastructure Outsourcing" (first success)

- Shift of work offshore (short term drop in revenues)

- Closing of low value non-scalable engagements

- Global re-launch of MVS

Zensar's Multi-Vendor Support

Customer Data Centers

Infrastructure Components

Server Storage Network OS EUC

Service Providers

DELL · EMC² where information lives · Microsoft Windows Server System · hp · HP-ux · Juniper NETWORKS · IBM · redhat · BROCADE · Sun ORACLE · HITACHI DATA SYSTEMS · lenovo · FUJITSU · NetApp · Apple · CISCO · AIX · solaris · Blue Coat · riverbed Think fast. · ARUBA networks · McAfee · Check Point SOFTWARE TECHNOLOGIES LTD. · Tivoli software · RSA SECURITY

One Stop MVS Provider

ZenSar TECHNOLOGIES

- Single point of contact for all infrastructure support

- Unified and integrated processes for all systems

- Global 24x7x365 multi-lingual help desk and local field support

- One contract and one bill

Zensar's Global Logistics

Warehouse
Stocking Locations
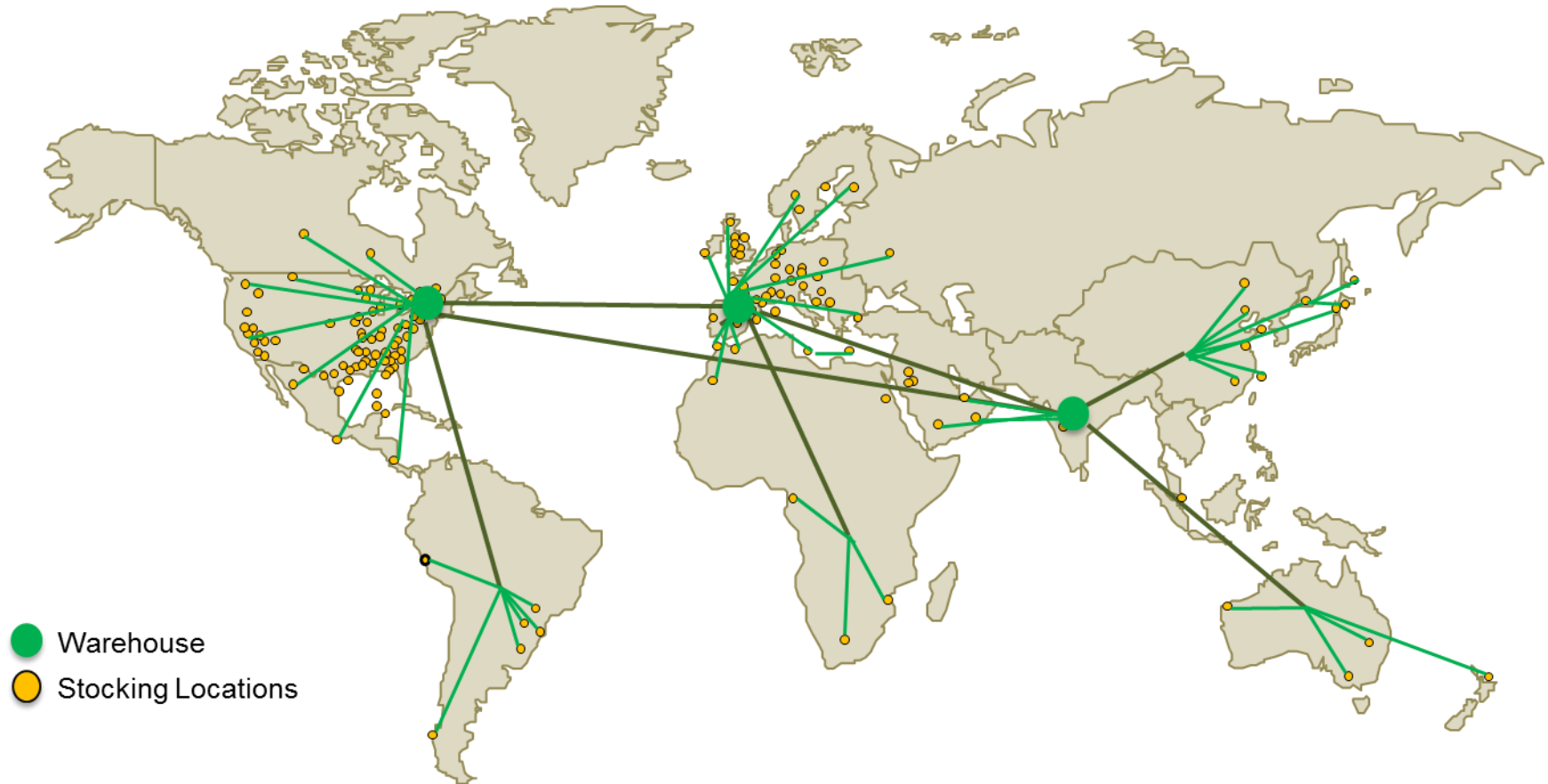
- State of the art IT systems
- 180 strategic stocking locations

- Supporting over 500,000 units
- Across140 countries

Current State – The Good and The Bad

Sales opportunities

Wins
- H1 = $ 7M / *Q3 = $ 20M*

Under Pursuit
- Total value of large opportunities = *$ 105M*

Go-to-market

- Total Infrastructure Outsourcing (TIO)
- Multi-Vendor support - a unique positioning amongst Indian IT companies
- Migration to hybrid cloud infrastructure
- Global integrated multi-lingual service desk capability

Drop in revenue

- Moving work offshore
- Exit from non-growth accounts
- Long lead times for large deal closures

Current State – The Good and The Bad

What we are seeing today
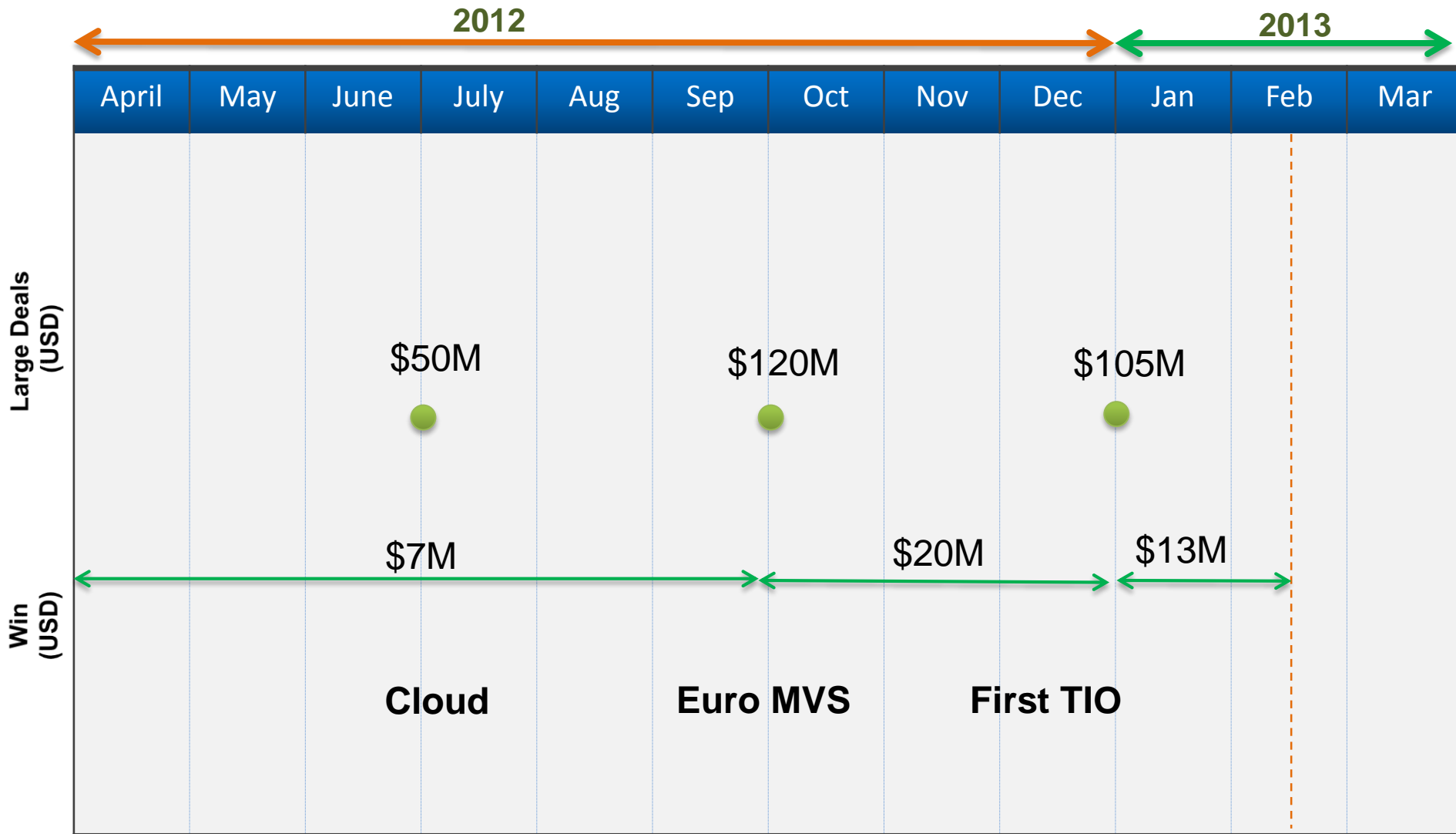
- Most analysts, except Ovum, bullish about growth in IM in 2013

- IM continues to be an arrowhead for most IT companies

- Zensar is among only a few that have global MVS (Breakfix) capability
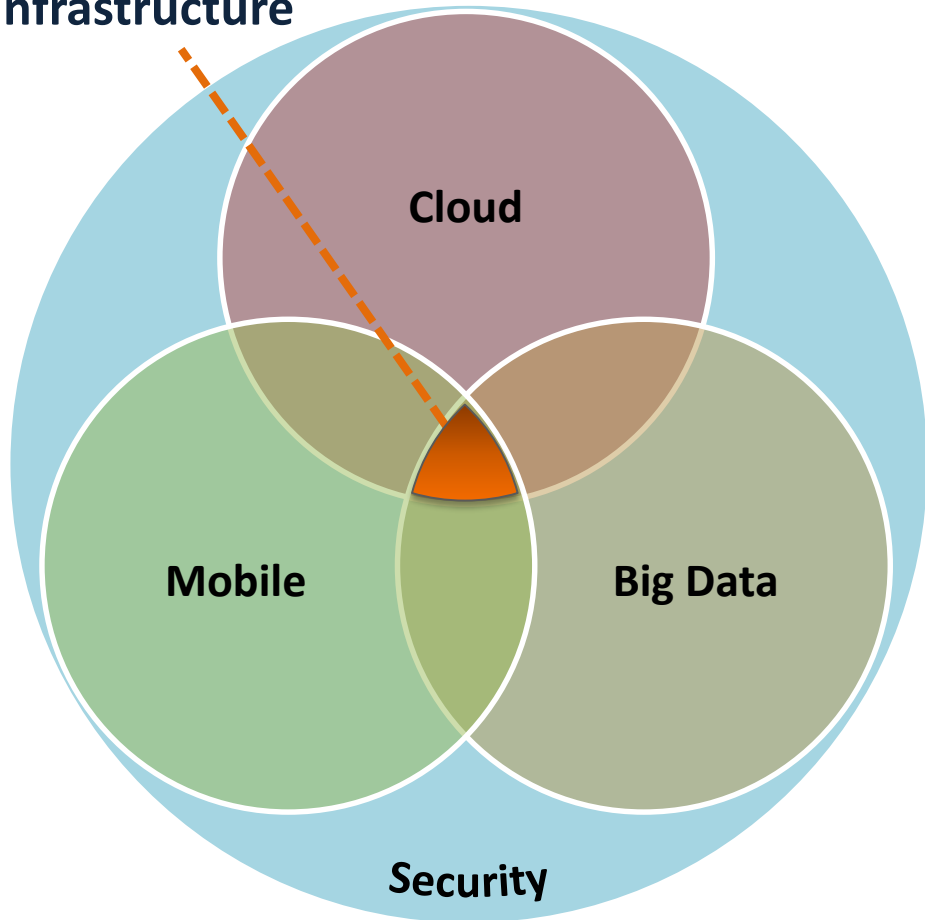
- Uniquely placed among Tier-2s

Outlook for FY14

- Healthy opening large deal pipeline

- TIO & MVS to be main arrowheads

- Verticalization of IM offerings

- Single brand & logo globally

Service Alignment

Trends

Services

Infrastructure

Cloud

Mobile

Big Data

Security

- **Consulting Services**
  - Assessment services geared to identify savings potential as a precursor to Total Infrastructure Outsourcing
  - Verticalized Service Offerings
- **Data Center Services (DCS)**
  - Managed Services for On-Premise / Hosted Private Clouds
  - Enhance Virtualization and Consolidation Capabilities
  - Storage Management
- **End User Computing (EUC)**
  - Managed Mobility Services
  - Enhanced Virtualization Services
- **Security and Compliance (S&C)**
  - Compliance in the Virtual and Cloud Environments
  - Data Security and Privacy
- **Remote Infrastructure Management (RIMS)**
  - Integration capability for Monitoring and Management Tools
  - Single Pane of Glass View

Global IM Business Model
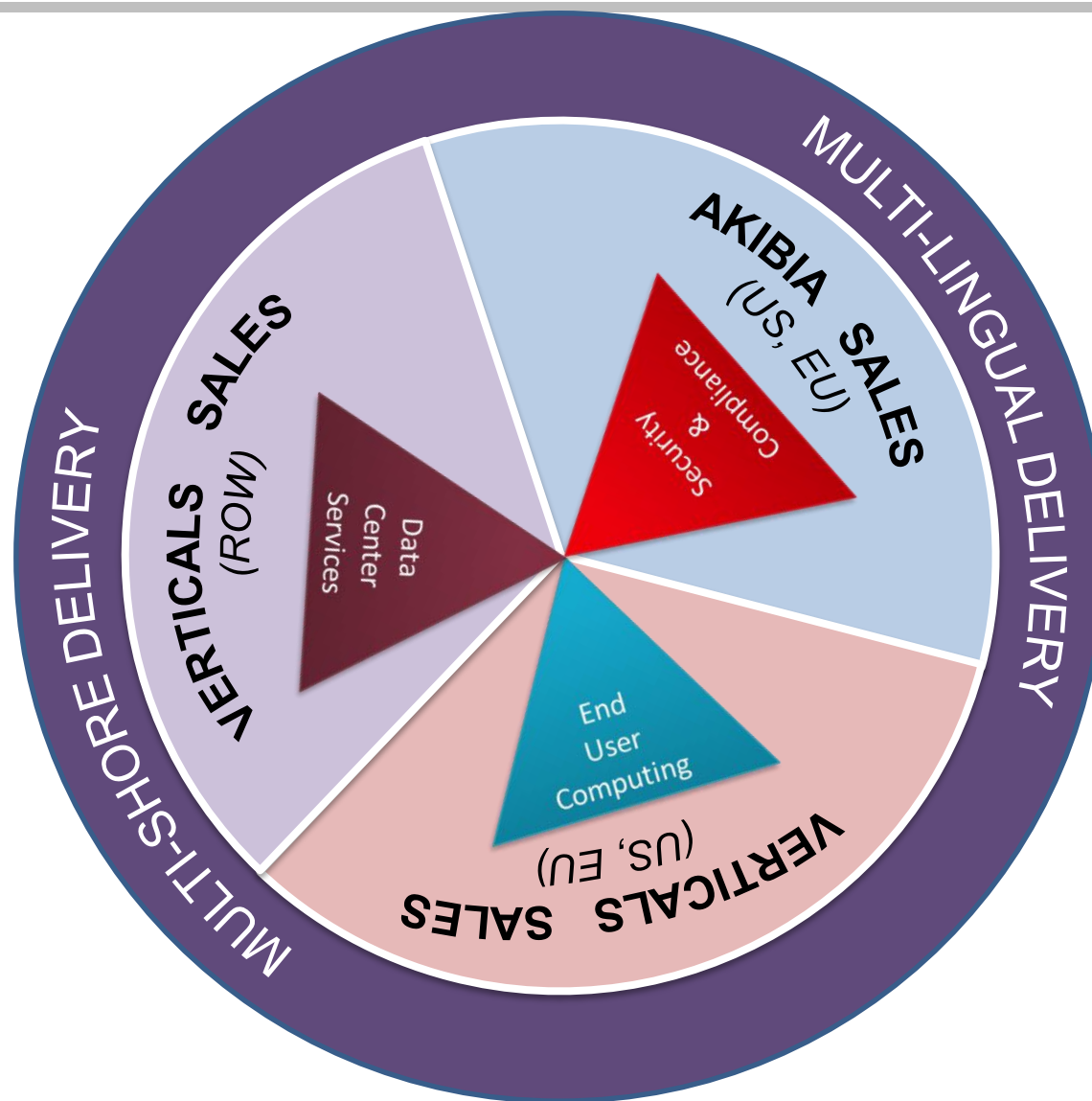
Global Integrated Framework

Infrastructure as a Service

- Enterprise Cloud Computing
- Virtual and Physical Servers
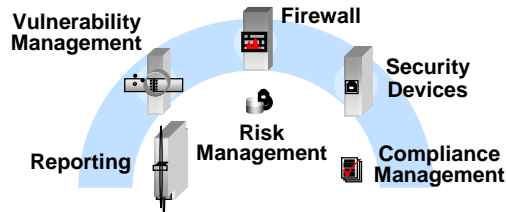
Service Desk

VoIP Network across:

- Westborough
- Veenendaal
- Shanghai
- Pune and Hyderabad

Contact Center

- Contact Center
- Intelligent Call Routing
- Hosted / Premise ACD
- IVR and Speech

Security

Vulnerability Management

Firewall

Security Devices

Reporting

Risk Management

Compliance Management

On Demand Services

- Messaging Service
- Server Monitoring
- Network Monitoring
- Database Monitoring
- Storage Management

Global IP Partner Network

Secure Gateway

- Westborough
- Veenendaal
- Shanghai
- Pune and Hyderabad
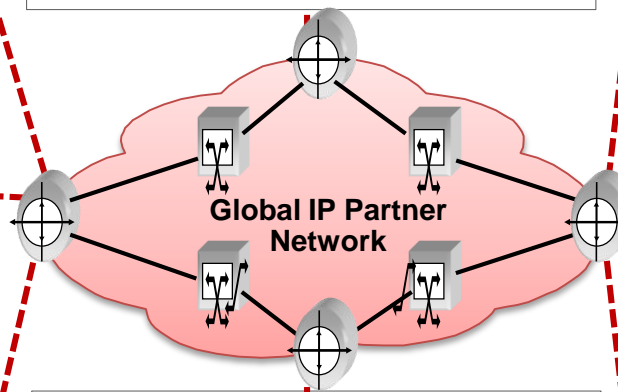
Data Center Solutions

- MVS
- Consolidation
- Migration
- Hybrid Cloud
- Cloud Switch

Unified Communication

- Unified Messaging
- Managed Reporting
- Web Conferencing