Global Infrastructure Management Business

Update

Vivek Gupta and Tom Tucker
20th February, 2013
Agenda

Industry View

Year 1 (FY12) – Integration

Year 2 (FY13) – Consolidation

Year 3 (FY14) – Leveraging
Global IM Opportunity - By Geography


Source: Ovum
Global IM Opportunity - By Service


Source: Ovum
Global IM Opportunity - By Verticals

CAGR (2011-2016) Growth for IM Services Demand

- 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

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

Integrate Story

- 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

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Strategic Objective

To achieve $400m Revenue from IM by FY17

Akibia

Data Center services and Multi-Vendor Support

Remote Infrastructure Management

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

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

One Stop MVS Provider

- 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

Infrastructure Components
- Server
- Storage
- Network
- OS
- EUC

Service Providers

Customer Data Centers
Zensar’s Global Logistics

- State of the art IT systems
- 180 strategic stocking locations

- Supporting over 500,000 units
- Across 140 countries
Current State – The Good and The Bad

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

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

Sales opportunities
- 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

Go-to-market

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

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<th>Large Deals (USD)</th>
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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
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 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
- Risk Management
- Compliance Management

On Demand Services
- Messaging Service
- Server Monitoring
- Network Monitoring
- Database Monitoring
- Storage Management

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

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Thank you