



E-Governance – India

March 2011

Executive Summary

Market

- e-Governance market in India is expected to see huge development in the near future
- IT spending by the Indian government was pegged at INR XX bn in 20--
- Government spends a% of its allocated IT budget on IT services and software which provides huge opportunity for the IT industry

e-Governance Structure

- National e-governance plan consists of Segment 1 which is further divided into Sub Segment 1, 2 and 3 and Segment 2 which is divided into Sub Segment 4 and 5
- The total outlay for Z under Plan 1 is INR Y bn

Implementation Issues

- Some of the major issues faced while implementing e-Governance includes funding, change of management, privacy, authentication, interoperability, standardization and use of local language
- Funding is the foremost issue in e-Governance initiatives which can be addressed through public private partnership
- Implementation of local language is also considered to be imperative as it helps rural citizens to access e-Governance service

Investment Opportunity

- There are certain sectors in India which are expected to have strong growth prospects owing to e-governance plan
- Sectors include – Cloud computing, telecom, information technology – software & hardware
- E-Governance is also expected to see huge demand from foreign governments

Competition

| Domestic Players | | | Foreign Players | |
|------------------|-----------|-----------|-----------------|-----------|
| Company 1 | Company 2 | Company 3 | Company 4 | Company 5 |



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- **Market Overview**
 - e-Governance Structure
 - Implementation Issues
 - Investment Opportunity
 - Project Status
 - Competition

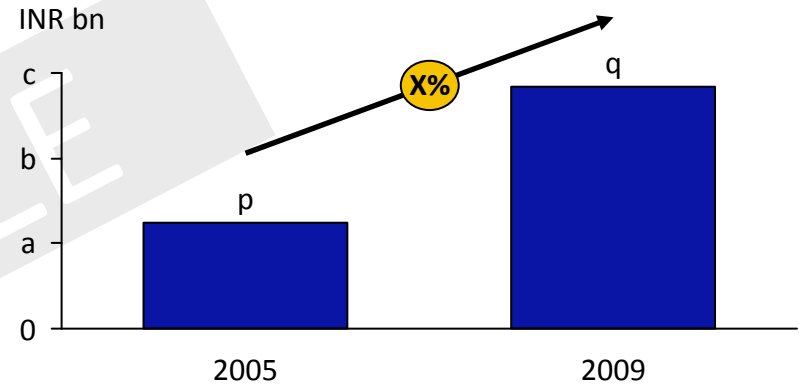


Growing demand for services and public information is creating a huge market for e-governance

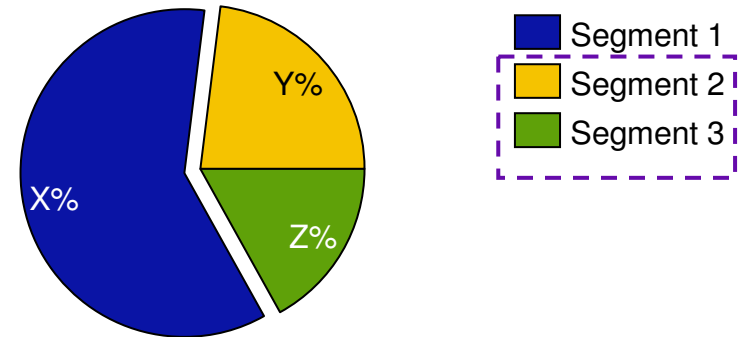
e-Governance – Overview

- e-Governance market in India is expected to see huge development in the near future
 - Growing demand for services and information by the common man is pushing the government to provide services at a faster rate and with increased capacity
 - It helps the government access people in remote areas
- Plan X was initiated in 20XX with a view to provide services to the citizen
 - It has been estimated that the government will spend around INR X-Y bn every year for next X years
 - In 20XX-Xx, government had spent INR X bn under Plan 1
- Development of e-Governance has created huge opportunity for the X market
 - It has been expected that the government will spend X% of the annual budget on e-Governance projects
- Nowadays, Z firms have a special dedicated department for dealing with X type projects
- Huge success rate of e-Governance projects in India has made countries such as Country 1, 2, 3 and 4 to implement it in their own countries

IT Spending by Indian Government



Share of IT Spending by Government



Huge opportunity for X industry for E-Governance



MMPs Project Implemented (1/11)

Project 1

Fact sheet

| | |
|---------------------------------|----------------------|
| Commencement | XX |
| Project Life Cycle Stage | Design & Development |
| Financial Outlay (INR mn) | XX |
| Financial Achievements (INR mn) | XX |

Project 2

Fact sheet

| | |
|---------------------------------|----------------------|
| Commencement (dd/mm/yyyy) | XX |
| Project Life Cycle Stage | Design & Development |
| Financial Outlay (INR mn) | XX |
| Financial Achievements (INR mn) | XX |

Developments

- It is implemented to ensure that government procurement becomes simplified, transparent and result-oriented
- X has implemented the Solution X in Z States and Y other Government Organizations, for the past X years and so far more than X tenders have been published worth the value of INR Y bn

Developments

- X MMP has been included in Plan 1 with an effort to consolidate the learning from the past, integrate all the diverse and disparate efforts currently underway, and upscale them to cover the entire country
- This MMP is implemented in two phases:
 - 1st Phase includes P, Q, R, S and T to be finalized
 - 2nd phase has been conceptualized in X stages such as Stage 1, 2, 3, 4 and 5

Source:



Domestic Players in the Market (1/7)

Company Snapshot: Company 1

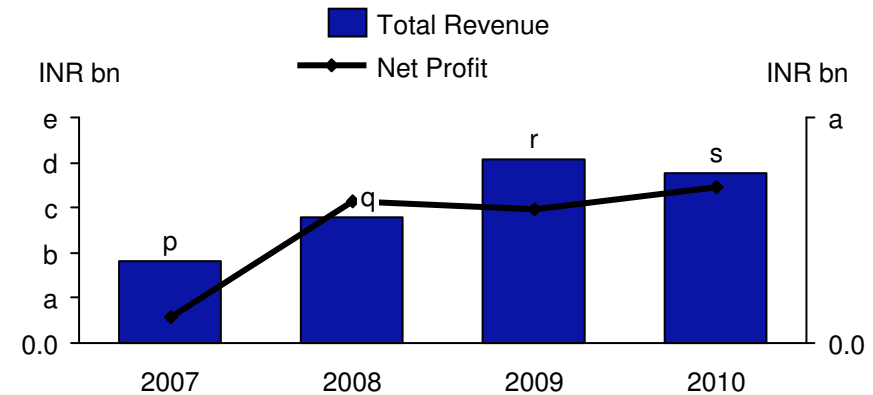
Corporate Information

| | |
|---------------------|------------|
| Headquarters | State 1 |
| Founded | XX |
| Company type | Listed |
| Key People | Mr. X – MD |

Business Highlights

- It is an X company and provides Solution X in the e-governance space in India
 - Its products include Product 1, Product 2 and Product 3
- Is considered to be one of the few companies in India which has exclusive focus on the X type projects
 - It has received several awards from the Ministry of X for its contribution to the development of X type projects
- Its award-winning Solution 1 for X Bodies – Product 1 is in the process of being implemented at all the Urban Local Bodies in the State 1
 - This e-governance project is worth INR Z mn

Financial Performance



SAMPLE

Source:

Note: All figures for respective financial year ending 31st March

