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Chairman's Message



Dear Friends,

It was only when the secretariat reminded me about this note that I realized that one full year had gone by while I was still getting used to my role at IMAI. It has been a fast-paced, crisp and action-packed year for us at the association and I am going to share some of the stuff that has kept us on our toes for the last one year. As is the tradition at IMAI, I shall restrict myself to the work of the association while in his role as the Vice-Chairman, Dhruv Shringi would apprise you of the progress of the industry in general.

Public Policy:

IMAI has been deeply involved with several public debates around the legislations and policies that affect our industry directly or indirectly. Let me highlight just few important ones here. In my view it seems that the biggest success this year of our work in the public policy space has been to be able to finally convince the government that internet and mobile advertisements are used by smaller companies and hence should be exempt from the service tax. I am happy to report that the Finance Bill of 2012/13 includes all advertising except TV and radio as a part of the negative list of service tax. We would have to wait for more details and clarification on this till after the Finance Bill is passed.

I am happy to report that an important area of work for us at IMAI has been to make a strong logical argument for public investment in broadband infrastructure, especially for rural areas. This argument made through a joint report prepared by ICRIER, Department of Information Technology and IMAI seemed to have been put in action by the government.

A third positive development in our public policy work has been the general recognition that local language content and services hold the key to accelerating internet penetration. We are working closely with local language publishers and the Department of Electronics and Information Technology on addressing the technical and business sides of making local language content and services more pervasive. One pioneering action on public policy that was expected to be closed by this fiscal was TRAI's recommendation on the mobile value added service industry. IAMAI has very strongly recommended and supported an open and liberal regime as opposed to a licensed regime for mobile value added services. We hope that TRAI's final recommendations reflect our standpoint.

A more contentious issue this year has been the so-called Intermediary Rules published in April 2011 soon after the year began. The subsequent controversy is too well known to be reiterated here. Suffice it to say that there is a general consensus that while extant laws of the land need to be followed by all parties, these Rules need much tweaking in order for them to be practical for the industry to fully comply with them. We are committed to engage with the government on the IT Act just as we have been doing for the last 8 years and expect that the suggestions on the Rules that we had submitted in May 2011 would be given due consideration.

Strategic Research:

While most of you would be aware of the market research that IAMAI undertakes so meticulously every year, let me briefly report on the three strategic researches that we completed this year. In partnership with Analysys Mason, IAMAI created perhaps for the first time a vision document for the mobile value added services industry. The report was formally released by Sachin Pilot, Minister of State for Communications and IT and has been very well received by the industry. Some of the recommendations on policy made in this report have been included in the TRAI consultation paper on mobile value added services. We are hoping that TRAI's final recommendations on the industry will reflect some of the key arguments made in this paper.

The second strategic report published this year was the innocuously titled "India: Impact of Internet" and as mentioned prepared in partnership with ICRIER and the Department of Electronics and Information Technology. This report for the first time in India co-related internet penetration and GDP growth. It also showed how different states would be impacted by increasing internet penetration. This report was released by R Chandrasekhar, Secretary, Ministry of Communications and IT, who mentioned in his address that an allocation of INR 20,000 had already been made by the government to build the fibre optic backbone needed to connect all the panchayats.

A third strategic report this year was prepared in partnership with Intelink on the potential for ecommerce in India. The study used a complicated matrix of education, geography, income and profession to project how many household in India would be ecommerce ready by 2015 and 2025. The foreword to this report was by Jyotiraditya M Scindia, Minister for State for Commerce and Industry. I am a bit disappointed that in spite of our best efforts, we could not complete this year a critical report titled "Cash to Cashless" in partnership with India Development Foundation. We plan to complete this report by May 2012. We would continue to allocate substantial resources to strategic reports in the coming years.

Business Development:

As you are aware, the association does not directly help in business development. However, for the last five years IAMAI has been at the forefront of category development through its now well-known roundtable discussions and workshops. This year the focus was primarily on mobile marketing. More details on these customized workshops and roundtables appear a later in the report.

Conferences

IAMAI has been the pioneer in industry relevant conferences for several years now. This year too was no exception. We organized 8 very large conferences covering marketing, travel, SMEs, mobile value added services etc. A special mention must be made of three conferences that attained new heights this year. The first was the Travel Conference that was attended by 300 delegates, a rare feat even for a traditional travel conference. The second was the Financial Inclusion conference that is an annual conference. It was scaled up to two days covering various aspects of digital money. I am pleased to report that 500 people attended this two-day conference in Mumbai. Finally, the India Digital Summit which incorporated the India Digital

Awards and the Entrepreneurs Exhibition this year, provide to be the biggest ever industry event this year with over 900 people attending the two day show. Conferences are very important meeting, networking, knowledge sharing and brand building platforms of the industry and going ahead we would be up-scaling some of the annual events to international standards.

Social Responsibility:

This report would not be complete without a few words on two outstanding socially relevant work that IAMAI has been doing for the last few years. The first of course is the well-known Safe Surfing Campaign. The campaign started three years ago with a grant from National Internet Exchange of India. Till last year the campaign had reached out to more than 4.5 lakh school students between the ages of 11 and 18 across the country. This year we have added another 30,000 students across the country. Another equally important campaign that we started last year but scaled up this year was training the local police in the art of fighting cyber crime. Our campaigns have been very extensive in the states of Haryana and Uttar Pradesh. We plan to extend it to other states. I would like to take up this opportunity to thank the Department of Electronics and Information and the National Internet Exchange of India for the grants that they have extended from time to time to make these campaigns possible.

Before I sign off I would like to thank the governing council for their advice and counsel and the secretariat for their proactive approach and to all members for their continued support to the association. The Council and I are looking forward to another vigorous year ahead with you.

Sincerely,
Hitesh Oberoi

Vice Chairman's Message



Dear fellow travelers,

At the best of times it is an onerous task to comment on the annual state of the industry, but let me make an honest and candid effort.

I think a decade later if someone were to write the history of the internet business in India with the advantage of hindsight, he would certainly have to consider the year 2011/12 as an important landmark in many ways. In my report below I will try and highlights the reasons for the same..

First, take the case of number of internet users which is a key driver of the continued growth of the industry. This year the number of internet users crossed 100 million, a major psychological and real landmark by any standards. What is even more interesting than this magic number is that all enumerations including that of IAMAI have clearly established that for the first time this year the rate of growth from smaller towns has been faster than the metros and, even more significantly, while it has not yet become a trend, number of people accessing from households has risen faster than people accessing from cyber cafes. The rural internet user numbers too have gone up satisfactorily. Last but not the least, there were distinct signs this year that internet was decidedly shifting to the mobile. From the demand side, therefore, this year has been important for the industry.

The second important trend has been the all round growth of the various segments that constitute the industry. Of course, online retailers have led the charge. According to our calculations the number of online retailers stood at 360 in the middle of the year and despite minor tremors, continued to grow and attract level headed entrepreneurs. Other segments such as online advertisement, mobile value added services etc. noted a healthy double-digit growth and attracted new investments and entrepreneurs. Transacting consumers as a proportion to total internet users con-

tinue to be low. However, some innovative business models, such as cash on delivery, would gradually evolve to increase the proportion of transacting users.

The third important landmark this year has been the government's proactive stance on internet penetration and use of internet as a tool for governance and beyond. It is now well known that the government has finally committed to creating an infrastructure to take internet to the villages. In addition, through the Electronic Delivery of Services Bill, it wants to provide an entire range of government services through mobile phone. If passed, this would be a revolutionary piece of legislation.

This year, very deservedly, the Union Budget it seems has granted an indirect incentive to the digital industry by including digital advertising in the negative list of service tax.. We hope that this provision is implemented immediately after the Finance Bill is passed. While such steps would go a long way in creating and meeting demand, we would urge the government to continue with the light touch on public policy issues. Internet would continue to be more useful than harmful to the citizens of this country and the lesser the regulations and restrictions on its use, the better it would be for all around development of the industry.

A fourth trend that started this year is the awareness that in order to penetrate newer markets in rural India, local language content and services have to be given due importance. Given that the government itself is projecting 300 million internet users by 2016, it is time that local language was made an important component of internet. As internet moves into semi-urban and rural areas much more innovation in products and services will have to be done to acquire and retain the new wave of users.

A final trend that can be said to have started this year is the movement of many of the erstwhile b2b mobile value added services towards b2c platforms leveraging the power of the open internet. Many of the larger companies in the so called mobile value added services have realized scaling up is possible only when they own their customers.

While these trends will mean a larger, deeper and perhaps an easier playing field in the coming years, the industry needs to be aware of the fact that more growth, visibility and opportunity will inevitably bring in more regulatory attention, more pressures from other sectors as well as from consumers. We need to be able to identify those pressure points early and resolve them in ways that don't inhibit growth.

Finally, a word of thanks to Hitesh, the governing council, and the staff of IAMAI for their enthusiasm. I am looking forward to another hectic year ahead.

Cheers,

Dhruv Shringi



Introduction:

Since its inception, evangelising and promoting digital marketing/advertising has been one of the primary goals of the association. Towards this in the last 8 years we have made a serious and successful attempt at preparing the overall ground for adoption of digital advertising. In the year 2011/12 while the focus remained firmly on the macro issues of developing this segment, we took on the rather challenging new task of specifically promoting mobile marketing. As we are all aware, mobile marketing, beyond sms, is just about beginning in India and with the help of a few of our members we began the work of championing this medium.

This chapter talks about various facets of our work in 2011/12 for digital marketing, the focus being primarily on business development through evangelising.

DAVP Empanelment:

You would be aware that after three years of our efforts along with the leading on-line publishers, in the year 2010/11 the Directorate of Audio-Visual Publicity [DAVP] finally and formally opened the door for enlisting online publishers for government



advertisements. At the same time the empanelment process for sms aggregators also began. In the year 2011/12 DAVP empanelled 36 online portals for a 3-month pilot project for government advertisements. Duration of pilot project was from 21 November 2011 to 20 February, 2012. This is significant development for online publishers in India as it creates a new revenue stream for them and also allows them to prove the power of online media to reach out to a large cross section of the population at very low rates.

The DAVP website has rates for empanelled online publishers divided in 3 main groups based on unique user base on an all-India basis.

Audience Measurement

Audience measurement or more importantly, arriving at single currency, continues to be problematic for the industry. Over the years, based on advice from members, IAMAI has been connecting with various reputed research companies to arrive at a commonly accepted audience measurement process. This year, IAMAI organised an open house of advertisers, publishers and agencies with reputed research agencies: IMRB, Comscore, Nielsen and Komli to make presentations to industry on what grounds they covered and what methodologies they followed. Some of the issues brought forward by members post the session were:

- a) No single research agency covered all the grounds in an acceptable manner
- b) Some of the agencies presented what they were planning to cover in the future
- c) it was prima facie not possible to endorse one agency

The conclusion arrived at by the members was that IAMAI needs to connect with top 10 advertisers and find out what are the fields and measurement that they are comfortable with, and then work backwards from there to arrive at some sort of commonly accepted currency. IAMAI will take the suggestion forward in 2012/13.

It also must be mentioned in the passing that with mobile marketing and advertising picking up pace rapidly, it is desirable that a single acceptable unit of measurement is soon developed for mobile users. At present,

Business Development:

Although it is not IAMAI's mandate to assist in business development of individual companies, it actively promotes a category or a sub-category of business through stakeholders' roundtables and workshops. In the year 2011/12, IAMAI conducted several such workshops to promote internet market-

ing, email marketing, b2b marketing and mobile marketing in partnership with our members. The details of these roundtables and workshops are given below.

14th Media Marketing Roundtable: The 14th Media Marketing Roundtable was held on 17 May 2011 in Mumbai. The title for roundtable discussion was "Keyword to Call Tracking and Beyond". The day started with a Presentation by Mitesh Thakkar, Founder & CEO, AdoRoi followed by the panel discussion by Vivek Bhargava, Managing Director, Communicate2; Gulrez Alam, Founder, Resultrix; Amit Madhan, National Manager - Retail Products, ICICI Lombard; Sandeep Singh, Business Head, Quasar; Nishant Nayak, General Manager – Digital Marketing, Analytics & Products, FutureBazaar.com and was finally addressed briefly by Samarjit Singh, Business Head - Affiliated Programme, AdoRoi.

15th Media Marketing Roundtable: IAMAI and Communicate 2 Jointly organized the 15th Media Marketing Roundtable on 16 June 2011 in Mumbai. The purpose of the roundtable was to reiterate the fact that advertising in the Digital Media is completely different from the Conventional Advertising. In addition, Communicate2 took this opportunity to share their radically new model on how Digital Media can be leveraged to build brands online.

The session was moderated by Vivek Bhargava, Managing Director, Communicate2, other panellists included Suvodeep Das, Head Marketing, Kaya Skin Clinic; Yateesh Srivastava, Chief Marketing Officer AEGON Religare Life Insurance; Peshwa Acharya, Sr. Vice President- Marketing, Reliance Communications; Deepali Naair, Country Head, Brand & Corporate Communications, L & T General Insurance & Rafiq Gangjee, Vice President- Marketing & Communications, Yashraj Films.

16th Media Marketing Roundtable: IAMAI organised the 16th media Marketing Roundtable jointly with eBay India on 15 July 2011 in New Delhi. The theme of discussion was "How can brands replicate their offline success online?" The panelist were Muralikrishnan B, Country Manager, eBay India, Rahul Marwaha, Vice President, Interactive Avenues, Alok Bharadwaj, Senior Vice President, Canon India, Jaspreet Bindra, Regional Director- Retail Sales and Marketing India, Microsoft, Manoj Chandra, Vice President – Marketing & Customer Services, Bata India, and Akhil Minocha, Head Marketing, Value Added Services and New Product Development, Videocon Telecommunications. More than a hundred delegates attended the roundtable.

18th Media Marketing Roundtable: IMAI and Experian jointly organised the 18th edition of Digital Marketing Roundtable. Some of the topics that were discussed by the panellist were: it is necessary to track and monitor your market to increase your ROI? leverage on your existing vendors, potential partners and prospects and engage your clients online especially through mediums like the social media to grow you business in the Digital World.

Internet and Mobile Marketing Seminar: Online marketing has been a mystery for SMEs for a long time, which restrains them from fully utilising the potential of the medium. In order to demystify online marketing strategies for SMEs, IMAI and Sahara Next jointly organised a Seminar on Internet and Mobile Marketing in Lucknow on 25 November 2011. The event was attended by more than 120 SMEs.

3rd Email Marketing Roundtable: the 3rd Email Marketing Roundtable was organized by IMAI with Netcore in Bangalore on 19 August 2011. This session was intended to bring out the growing impact of internet for reaching out to the potential customers. The theme of this session was "Email Marketing: The stepping stone to successful marketing strategies".

4th Email Marketing Roundtable: The 4th Email Marketing Roundtable was organized by IMAI with Netcore in Mumbai on 13 December 2012. The discussion was on topics like How clicks become ROI and bring cash for marketers? Is email a strong marketing tool? Where does Email stand in Indian marketers marketing spend? How email has evolved - what we use to do and what is being done now?

B2B Marketing - Innovate Series:

IMAI with LinkedIn held three B2B Marketing - Innovate Series. The digital media is redefining how B2B businesses can market across different countries. Innovative solutions exist for B2B marketers to understand and tap the potential of new media in reaching and engaging with right audience in different countries and markets, this B2B series was organised to understand and discuss these innovative solutions across three cities.

B2B Marketing - Innovate Series I:

How does Digital Media influence B2B trade across the world? This was the topic of discussion at the B2B Marketing series in Bangalore on 5 August 2011. The power-packed session included as panelist Hari Krishnan, Country Manager, LinkedIn; Virginia Sharma, Vice President- Marketing and Communications, IBM Software, India & South Asia; Rahul Agarwal, Executive Director- Commercial Business, Lenovo India; Kiran Gopinath, Founder &



CEO, Ozone Media, Suchita Vishnoi, Head Marketing, TrendMicro, India & SAARC among others.

Over 65 representatives of companies like Adobe, Dell, iGate Patni, L & T Infotech and NetApp India among others attended the event.

B2B Marketing - Innovate Series II:

The second B2B marketing solutions' roundtable was held on 26 August 2011 in New Delhi. With a packed hall, high quality speakers and enthusiastic participants, it turned out to be a value for money event for all stakeholders. The panellists for this session were Hari Krishnan, Country Manager, LinkedIn India, Dhiman Mukherji, Director - Marketing Solutions, LinkedIn India, Punit Modhgil, Director - Enterprise Marketing, Microsoft, Kartik Nagarajan, National Director - Social & Insights, Group M, Mohit Hira, Chief Marketing Officer, Global Individual Learning Businesses, NIIT Ltd., George Paul, Director Marketing, Ericsson India, Deepak Shetty, Sr. Vice President - Domestic Sales & Marketing, Moser Baer India.

Over 75 representatives of companies like Bajaj Capital, Aircel, Educomp, HCL, ICICI Bank, Make-mytrip, Mahindra Group and LG Electronics among others attended the event.

B2B Marketing - Innovate Series III:

The last in the series of B2B Marketing Roundtable concluded in Mumbai on 15 September. The roundtable was about Innovative solutions and ideas for B2B companies to build their brand presence using social media to reach the right customers and engage with potential customers. The session theme was "Building your brand using Social Media."

The roundtable was attended by 100 plus delegates who were representatives of companies like HDFC Life, Godrej Interio, HUL, BBC Worldwide, Birla Sun-life Insurance, Asian Paints and Yes Bank among others attended the event

Mobile Marketing Roundtables:

IAMAI with One97 held two Mobile Marketing Roundtables which were organised to discuss and reflect on the issues faced by and new developments occurring in the mobile marketing industry. The two roundtables touched upon subjects like 1. Why Mobile is Key to the Multichannel Mix for the 2011 festive and summer season and 2. Mobile Marketing: Integration into your Marketing Mix.

2nd Mobile Marketing Roundtable: The theme of the discussion was that with the festive season, mobile will play a key role in communication, in shaping marketing, communication and brand recall by consumers. The roundtable was organised on 29 Sept 2011 at New Delhi. The speakers at the Workshop were Vijay Shekhar Sharma of One97, Amit Tiwari, Country Head - Media, Philips India, Rajat Gandhi, Head, Performics, Rahul Narvekar, Co Founder - Director Brand Sourcing, Fashion and You, Kanika Mathur, President India & SEA Solutions Digitas and Arjun Basu, Co Founder & Chief Financial Officer, Mydala. At this roundtable the panelist discussed:

- The risk of not including mobile in the festive and holiday marketing plan
- The set of brands which are making correct mobile marketing decisions

Over 70 representatives of companies like Dish TV, Lintas Media, Bajaj Allianz, Century Ply, Shalimar Paints, Sony India and Maruti Suzuki attended the event.

3rd Mobile Marketing Roundtable:

The 3rd Roundtable on Mobile Marketing was organised in Mumbai on 9 of February 2012. The main focus of the discussion was integration of mobile marketing into the marketing mix and mass market opportunities. The session was moderated by Vijay Shekhar Sharma of One97. At this roundtable the panelist discussed:

- Measurement strategy for mobile marketing
- Possibilities of mobile for a marketer in mass market opportunity
- Mobile Internet: How can marketers capitalise & possibilities for marketing on this medium



There were over 75 delegates from companies like Raymond, Aditya Birla Group, Ranbaxy, Axis Bank, Starcom, Reliance Capital and Cipla at the event.

Market Education:

As a part of our effort towards broader market awareness on digital marketing, IAMAI organised the 7th Marketing Conclave on April 21 in Mumbai. The Conference was co-presented by IBM India. It brought together experts from the domains of mobile and internet and marketing to discuss and deliberate the evolution of the strategies and the way forward. The first panel discussion based on the theme- "Bringing science to the art of marketing" included speakers like Hitesh Oberoi, Chief Executive Officer, Info Edge; Vivek Bhargava, Managing Director, Communicate 2; C R Vinay, Chief Executive Officer and Founder, Customer Centria and Hari Krishnan, Country Manager, LinkedIn India. The discussion was moderated by Nagesh Alai, President, AAAI and CFO Draftfc b Ulka.

The next session was on 'Mobile Marketing: Consumer Engagement' saw panellists discuss what the future holds for mobile marketing in India, the new rules of engagement with mobile consumers, mobile commerce, and more. The session moderator was Milind Phatak, vice-president, Comviva.

Third session included speakers like Pradeep Shrivastava, Director Operations, Videocon Telecommunications; Sanjay Tripathy, Executive Vice President-Marketing and Direct Channels, HDFC Life; Abdul Khan, Head - Marketing, Tata Teleservices Maharashtra; Virginia Sharma, Director Marketing & Communications, IBM and Sandeep Amar, Head Marketing & Audience, Times Internet Ltd. Based on the theme - "Social Media- Advocacy in Advertising", the session was moderated by Ambareesh Murty, Country Manager, eBay India.

The fourth panel discussion themed 'Interactive Television – The Upcoming Opportunity for Marketers' was moderated by Vikram Sakhuja, Chief Operating Officer- South Asia, Group M. The panel members comprised Srikanth Srinivasamadhavan, General Manager Media Services –Unilever - South Asia, HUL; Ronita Mitra, Head- Corporate Brand Group, ICICI Bank; Salil Kapoor, Chief Operating Officer, Dish TV; Baskar Subramanian, Co-Founder, Amagi Media Labs Networks; Paritosh Joshi, Chief Executive Officer, Star CJ Networks and Debadutta Upadhyaya, Vice President- India, Vdopia.

The final panel discussion for the day was on 'Creativity and Marketing – through Emerging Technologies'. The discussion was moderated by Manish Vij, Founder, Vun Network. The panel extensively dis-

cussed about how creativity can blend with technologies to get a better impact and reach. Over 300 plus representatives of companies like Videocon, Volkswagen, Travelocity, Reliance, Group M, O&M, L&T General Insurance, Mahindra and Asian Paints among others attended the conference.

Market Research Report:

The annual market research report on digital marketing/advertising was published in March 2012. The highlights of the report were:

Digital Advertising is expected to reach INR 4,391 crores by March 2013. It is expected to reach INR 3,535 crores by the end of this calendar year. Currently, (March'12), the market is pegged at INR 2,851 crores. According to publicly available sources, the total size of offline advertising market including Print, TV, OOH, Radio, Cinema is INR 26,501 crores in the year 2012. Compared to this, the digital market at INR 2851 crores is almost 11

percent of the conventional medium.

On an average, the digital ad spends have been growing at 25% year-on-year basis. Travel and BFSI continued to be the main spenders as far as Display Ads are concerned. The Display Ad spend by Automotive companies has appreciably increased. Its overall share has risen from 9% in FY2010 to 13% in FY2011 to 14% in FY2012. The report also finds that Mobile Advertising is all set to touch INR 144 crores by 2013. As of March'12, the market is pegged at INR 105 Crores.

Mobile Ads accounted for about INR 90 Crores of the total Indian digital advertising industry in March 2011. The share of Mobile Ads has grown by 17 percent, valued at INR 105 Crores in March 2012. This is slated to reach INR 144 Crores by 2013, which will be approximately 4 percent of the total digital advertising, spend.



Introduction:

While IAMAI has been tracking the ecommerce market in Indian since 2007 and has been involved with minor policy issues governing ecommerce since then, it is in the last two years and especially in the year 2011/12 that it was called upon to play a larger role in promoting ecommerce in the country. Here are some of the work the association undertook in 2011/12 for the development of digital commerce.

Policy:

In the year 1999 when the IT Act was conceptualised, one of its stated goals was to promote ecommerce. It is now clear that IT Act does little to promote ecommerce. In the meantime, ecommerce continues to grow in spite of quirks of local laws, old laws that govern traditional retailing and numerous other local taxes and barriers that are an anathema to ecommerce. At IAMAI it was felt for a few years now that a new framework of policy is required if ecommerce is grow, reach the desired scale and make a significant contribution to the socio-economic needs of the country. Towards this in the year 2011/12 IAMAI members undertook the rather ambitious task of framing the “ask” of the ecommerce industry. The “ask” has been encapsulated in a draft “Framework of Ecommerce Law” which highlights the legal, fiscal and policy related bottlenecks to ecommerce in India. Given the complicated nature of the issue, by the end of the year a first draft was prepared and circulated to members for feedback. The draft inter alia lists various existing laws that impinge on ecommerce in India. It is clear that much more ground needs to be covered in 2012/13 in order for this paper to be complete enough to be presented to the stakeholders. IAMAI in consultation with members would continue to work on this project.

Business Development:

As in the case of digital marketing, the business development work for digital commerce was carried out through the strategic roundtables in the year 2011/12.

Smarter Commerce Roundtable: IAMAI with the support of IBM India hosted a series of "Smarter Commerce" Roundtable this year. The Strategic Open house discussion on smarter marketing in the age of empowered customer was organised on 16 May 2011 in Mumbai, 16 November 2011 in Delhi and 18 November 2011 at Mumbai.

Session

1:

The main aim of this open house discussion was to identify the trends that are shaping the marketing landscape in India. The other issues raised in the session included marketing innovation and transformation to deal with empowered customers, the technology leveraged by the CMOs to gain better insight as well as enhance the customer experience and provide more relevant offerings and, finally, the key challenges or constraints that prevent taking marketing to the next level. Marketing heads from companies like eBay, HDFC Bank, Hindustan Times, India First Life, L&T General Insurance, Tata Teleservices and Yashraj films among others participated in the discussion. The discussion was moderated by Ambareesh Murty from eBay India.

Session

2:

The issues discussed in this session were whether there is a change happening in consumer behaviour?, how are brands educating the new age smarter consumers?, how are brands staying ahead of smarter consumers to meet their demands and aspirations? Participants were of the view that customer today is spoiled with the choices being offered, consumer today wants to interact with brands. In order to meet these challenges brands need to smartly understand and anticipate customer needs and behaviour.

Participants from companies like Barista Coffee, Dr Lal Pathlabs, Lemon Tree Hotels, Mydala, Networkplay, Sona Koyo Steering, Fashion and You, Dish TV, among others participated in the discussion. The discussion was moderated by Manish Viz from Vun Networks.

Session

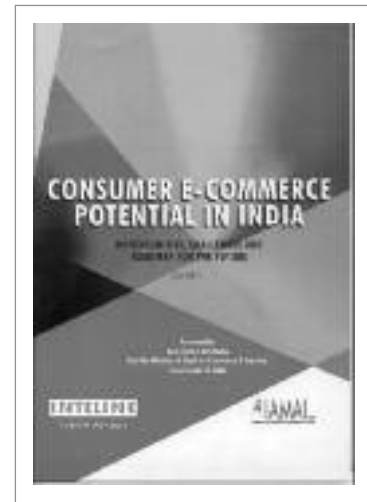
3:

The issue discussed at the 3rd edition was "How is consumer becoming smart today? Is it technology which is making consumer smarter or are there things beyond technology which attributes to the smartness of the consumer in today's age?, Are brands and businesses able to understand the

consumer in the right manner? is consumer really the consumer as we perceive her/him to be? how are businesses living up to the expectations of smarter and knowledgeable consumers? Participants were of the view that consumer is learning and learning really fast. They debated whether the level of trust has improved among consumers given the advancement and adoption of technology.

Participants from companies like Travelguru, LinkedIn, Kotak Mahindra Bank, Cinemax, Gitanjali, Dupont India, BBDO, People Interactive, GroupM media, Interactive Avenues, L&T General Insurance, and One97 Communications. Himanshu Singh of Travelocity moderated the session.

1st Digital Commerce Roundtable: IAMAI and Akamai Technologies jointly organised the 1st Digital Commerce Roundtable on the 3 November 2011. The purpose of the round table was to raise awareness about the innovative ecommerce models in India and creating comfort factors for customers. There were discussions about replicating offline experiences online, attracting customer to buy online, retaining the shoppers through an optimized site experience, innovative payment models. The panel included Bejul Somaia, Lightspeed Ventures, Pawan Gadia, Ferns 'N' Petals, Bruno Goveas, Akamai, Raman Gulati, HomeShop18, Gautam Sinha, Times Internet and Arjun Basu, Mydala.com



1st Digital Commerce Meeting and Joint meeting with payment Committee: The first joint meeting was held on October 14, 2011 between Digital Commerce companies and payment enabler to discuss the payment issues and how to work together and increase the percentage of online transaction. Both the group mutually agreed to work together and help the industry grow.

Some of the key factor, which the group felt would help digital commerce market grow, is easily available payment solution, Cost effective solutions, Trust and Volume.

Some of the Issues which were highlighted by committee, which need to be address in order to make the e-commerce pie grow are as follows:

- a) **Frequent Transaction failure** is one of the reasons that keep the user away from Transacting online. One of the issues, which the payment gateways raised for the transaction failure, is lack of proper communication from bank on any technology change in the system. Instance seamless communication on any such change would help in minimizing this.
- b) **Third factor Authentication for Online Payment:** Members are of view that with the third factor security in place there is a trust factor build within the customer and make them more comfortable in transacting online. However, with different bank following different ways of authentication it would have a negative impact on the users. A uniform thirds factor authentication process followed by all bank would help in solving this issue to some extent. The committee decided to submit a detailed note on third factor would be submitted to IBA.
- c) **Efficiency and Transparency:** Transparency of payment is important factor for trust building. There should be quick mechanism of refunding for the failed transaction. Members are of the views that companies could share this data to IAMAI and these could be displayed centrally at IAMAI site. As this would be in public domain, it would help in improving the services.
- d) **Customer Redressal Forum:** It was often notice that customer lose interest transacting online as sometime complains remain unsolved. Member mentioned that it would be a good to have a IAMAI Customer Redressal forum, where user would come and register their issue. This is a long term plan and would be formed after several rounds of discussions.

The committee felt that some of these issues could be solved by discussing with the banks and other relevant organization.

Market Education:

The market education for ecommerce in the year 2011/12 was limited to a large conference on travel and tourism industry details of which are narrated below. Due to scheduling issues the annual ecommerce conference which is the largest of its kind has had to be postponed to April 2012 which is outside the purview of this annual report.

Travel and Tourism Summit

IAMAI organised its third annual Travel and Tourism Summit on 30 June 2011 in New Delhi. The Summit attracted varied representation from the travel and tourism sector and as well as other areas such as

the media, software and IT industry to name a few. The main focus of the Summit was to assess and evaluate the current market of the travel and tourism and charter a way forward to meet the challenges that emerge in this industry.

Recognizing the role of technology in taking the travel and tourism industry to the next level, Himanshu Singh, CEO, Travelocity said, "India has the opportunity to create next generation models that will boost the online travel industry. We need to come up with hybrid business models to boost the online travel industry". He added that more value creation was needed for a sustained growth of the online travel industry. He also said that a framework is required for the digital commerce industry to exploit its potential.

One of the key points raised at the Summit was the contribution of social media in this sector. Whether Increase in the number of interactive bookings tips on social network; and with travel tours available on mobile, will travel industry grow more? The summit had over 300 delegates from various sectors of the travel and related ecosystem.

Market Research Report:

The annual digital commerce market research report was released in March, 2011. The report covered the following segments: Online travel, Online non travel, Financial services, E-Tailing, Digital downloads, and other online services. The total size of the ecommerce market was estimated to touch INR 46520 crores by December 2011. Online travel industry was estimated to reach INR 37,890 crores by Dec, 2011. Online non travel industry was estimated to reach INR 8,630 crores by December 2011, while etailing was expected to reach INR 2,700 crores by December 2011. Digital downloads or paid subscription was expected to touch INR 1,100 crores by December 2011. Financial services were estimated at INR 2,680 by the end of December 2010. Other services including classifieds were estimated at INR 2,150 by December 2011.

Since the report is usually accepted as the most com-



mon currency for the digital commerce market in India and widely reported in the media, it is worthwhile to say a few words on the methodology of research followed.

The results of the Digital Commerce report were arrived at by conducting primary research among Internet users in 15 cities as well as secondary research. Primary information about digital commerce was collected through face-to-face interviews during. These individuals were interviewed in 15 cities across India. Secondary research was done to understand the structure and dynamics of the digital commerce market in India. Information from various published resources was used to for data validation check. Information collected from secondary as well as primary research was thoroughly analyzed in preparing the report.

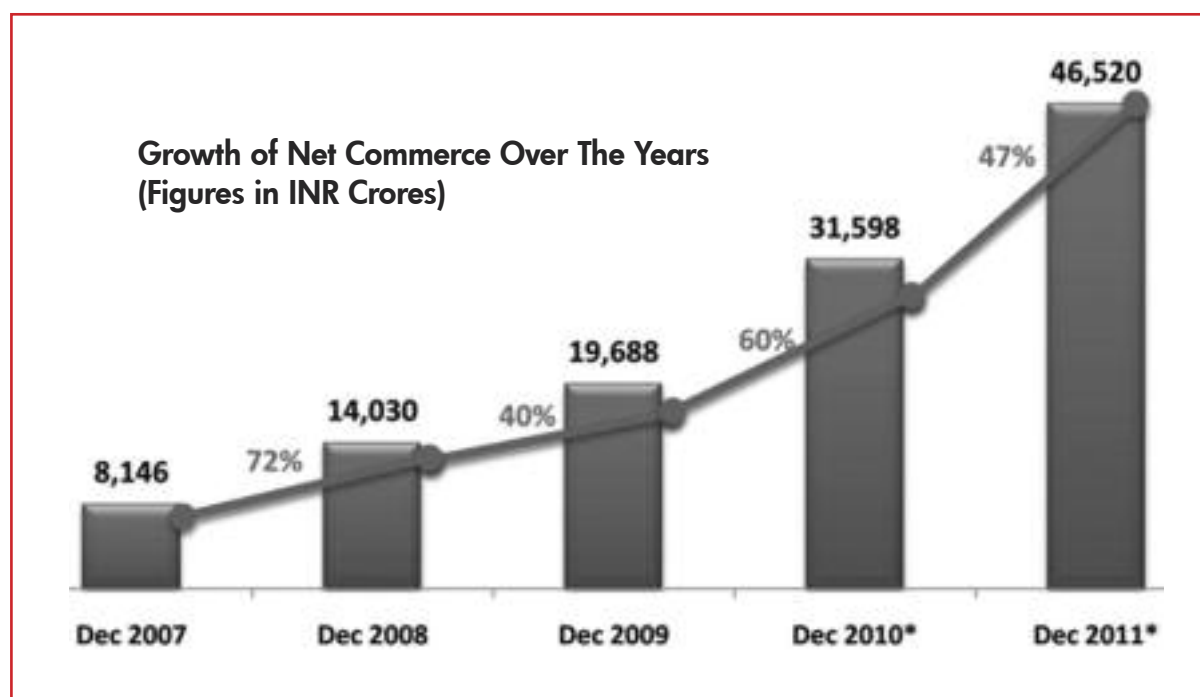
Strategic Report on Ecommerce Potential: The Consumer Ecommerce Potential in India report was an attempt to assess the fundamental consumer e-commerce potential in India. The objective is to characterise and quantify the socio-economic segments that present potential for different product and services categories, and forecast the increase in size of the opportunity in the next 10-15 years. Apart from this, the study also evaluates the major constraints and challenges currently facing the sector and builds a set of policy recommendations aimed at realising this potential. The main findings of the report are summarised here:

During 2009-10, the overall e-commerce potential was estimated at 146.2 million households or 61.3 per cent of total consumer households in the country. This includes 71.4 million households in the 'Core' potential category i.e., potential for most products and services categories and 74.9 million households with limited potential ('Low SEC').

The report finds that overall consumer potential is estimated to increase to 228.6 million households by 2024-25 or 76.9 per cent of the total consumer households in the country. This represents a compounded annual growth rate (CAGR) of 3 per cent in potential as compared to 1.5 per cent growth in the total number of households during the period.

According to the report, most of the growth will be in the 'Core' potential category, which will almost double from 71.4 million households in 2009-10 to 141.8 million households in 2024-25, accounting for close to 50 per cent of the total households in the country. More importantly, the two segments at the top of the hierarchy — Early Adopters and Primary Market — will witness the highest growth among the segments in the category.

Another important feature of this growth will be that rural and up-country markets will become more relevant for businesses across products and services categories. To the extent that a large part of this demand comes from geographically dispersed locations, it presents exclusive opportunities for space-neutral, technology enabled trade and distribution channels such as e-commerce





Introduction:

Since 2007 IAMAI has been working to get some clear policy guidelines from the government and the regulator so that the mobile value added services is able to grow on their own steam in a systematic manner. Given the regulated nature of the telecom business and the current dependence of VAS players on telcos, regulatory and policy issues continued to dominate the association's work in this segment. Happily, however, we were able to undertake some business development work as mentioned in chapter one. We were also able to launch a strategic report, our third in the year, on mobile VAS. Read more about our work for the mobile value added services industry below.

Policy

The year the industry was virtually inundated with some critical and business stopping policy guidelines which kept us preoccupied for most of the year.

TCCCPR (Telecom Commercial Communications Customer Preference Regulations, (Amendment) 2011)

The TCCCPR guidelines which heavily restricted commercial messages came into force with an Amendment released on 27 September 2011. The amendment exempted certain categories like DTH and TSPs and certain brands like Facebook and Google+ and some named directory services providers from the purview of the TCCCP guidelines. The regulator had suggested that for the rest it would follow a case to case clarification and permission. IAMAI rallied all members and non-members to send their cases to the regulator and by the end of a month was able to get clearance for all individual member companies as well as all major categories.

Code of Conduct for SMS Aggregators:

However, to follow the regulator's guidelines on commercial messages in letter and spirit, under the aegis of IAMAI, a group of SMS Aggregators (Members of IAMAI) have created and signed on an "Industry Code of Conduct". The signatories to this Code have agreed to comply with the regulator's guidelines on sms marketing. This group is also responsible for indentifying violators of the TRAI guidelines and bring them to the notice of the regulator. The first important concern of the regulator that

this group took up was the issue of overseas origination of smses. With active cooperation from this group of aggregators, overseas origination of commercial sms was stopped within a month of the guidelines being passed. The next issue, equally critical, that was taken up by the group was the issue of using transactional pipes for promotional messages to avoid the 5p charge on promotional messages. While this malpractice continues encouraged by unscrupulous marketers and sms marketing companies, gradually this is being brought under control. In a recent move a recalcitrant telemarketer was fined INR 1.5 lakhs for violating the transactional pipe based on a complaint by IAMAI.

MVAS activation

The mobile VAS activation of TRAI while keeping in mind the interests of consumers, mandated additional steps for procuring customer assent in addition to the three step process already in place. Soon after the directive was passed it was estimated that almost 30 per cent of the business would be wiped out as direct result of the directive. Consultations with members on the issue revealed many non-compliant practices in the activation of MVAS services such as activation without consent, difficulties in de-activation and lack of knowledge on part of the consumer on the active services on regular basis. After due consultation with members, telcos and entertainment companies IAMAI was of the view that while the ills of system needed to be removed, the guidelines per se would be of little help. In its submission to TRAI, the association made three points: a. verbal consent of the customer if shown to be auditable should be an accepted mode of customer consent; b. operators should have a centralised system for VAS management and c) customer should be provided with regular MIS on activated services and deactivation should be made as easy as activation. While the need for a centralised VAS management system seemed to have been tacitly accepted by all stakeholders, voice based consent and ease of deactivation still remains contentious. By the close of the year 2011/12 most of the operators were ready with a centralised VAS management system. The larger fallout and impact of the new system was still not clear.

TRAI Consultation Paper on Mobile Value Added Services [Consultation Paper No.: 5/2011 of 21st July, 2011]

In July 2011, TRAI had come out with a consultation paper on mobile value added services. While TRAI has been making passing reference to mobile value added services for the past 5 years in its policy statements, this was the first comprehensive paper on the subject. It was a nuanced paper which argued that with the rapid growth of this business a long term policy framework needed to be put in place. There was

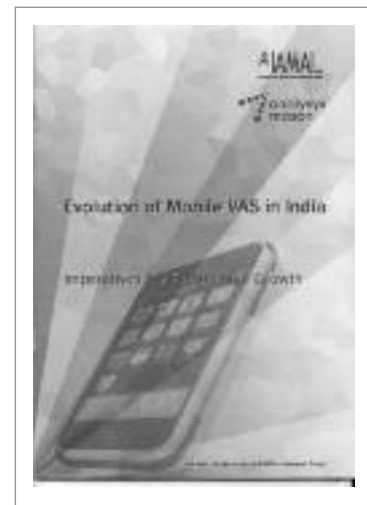
also a clear understanding in the paper that at the present state and in its current format there were some structural constraint that needed to be removed if the industry was to grow rapidly and be able to scale up. After identifying the problems that face the industry, the paper, as a solution, suggested two ways: a licensing regime and an open access system.

Before the consultation paper was published IAMAI has conducted a study with the help of Analysys Mason. A presentation based on the study was made to the Chairman, Members and senior officers of TRAI. The idea of an open access that formed an important alternative to licensing in the TRAI's paper was seeded in this report.

The general feedback on the TRAI paper was that none of the stakeholders wanted a licensing system for the MVAS industry. However, not many were clear about the alternative. IAMAI with the support of its members strongly advocated the open access approach as enshrined in the TRAI consultation paper. In support of this stand and in order to make it implementable, several rounds of meeting were held between members and senior TRAI representatives. At the close of the year the final recommendations of TRAI were still not published. Industry is eagerly waiting for it.

Strategic Research on Mobile Value Added Services:

The third strategic report of the year was prepared in collaboration with Analysys Mason and titled "Evolution of Mobile VAS in India". This detailed report focused on nine key themes emerging in the Mobile VAS space in India: Commerce, Entertainment, Video, Applications, Utility, Community, Advertising, Enterprise VAS and Network VAS. The report also identified market enablers by analysing successful global markets, and recommending policy measures through conversations with stakeholders across the value chain. The report also estimates the current market value and projects the future potential.



The report was unveiled by Shri Sachin Pilot, Hon'ble Minister of State, Ministry of Communica-

tions and Information Technology at a launch event on 27 July 2011 [for details see section on market education]

Market Research on Mobile Internet in India:

The annual market research on mobile internet was released in August 2011. The report inter alia highlighted the following: Mobile internet users would be 46 million by September 2011. The report also illustrates that Mobile internet usage has been witnessing a 15% growth quarter on quarter. 70% of the claimed mobile Internet users (urban India) belong to the Top 2 SECs i.e. SEC A and SEC B. Along similar lines, about 55% of the claimed mobile Internet users are from the Top 8 Metros (Mumbai, Delhi+NCR, Kolkata, Chennai, Bangalore, Hyderabad, Pune and Ahmedabad). Additionally, about 63% of the active mobile Internet users are from the Top 8 metros.

The primary research for the report was conducted through surveys among various households in 30 cities. This helped understand the penetration of mobile Internet usage in terms of claimed mobile Internet users and active mobile Internet users in India. Active Mobile Internet users were further interviewed to understand the applications accessed on the Internet through mobile, the frequency of accessing each application, typical mobile bills, the type of mobile Internet plans availed and so on.

Market Education

The presence of Shri Sachin Pilot at the launch of the "Evolution of Mobile VAS in India" report gave us an opportunity to organise a full day public conference on mobile value added services in Delhi. A second public conference on the topic was held in Bangalore in partnership with IIM Bangalore. The details of these two market education initiatives in the mobile value added services space is given below.

Launch of "Evolution of Mobile Value Added Services in India": This full day programme was inaugu-

rated by Shri Sachin Pilot, Minister of State, Ministry of Communications and Information Technology on 27 July in Delhi. In his inaugural address the Honourable Minister while elaborating the contribution of VAS and applications towards overall development, strongly advised the industry to work on local language services and applications and also on services that touched the common man.

Other sessions at the event included: "Entertainment VAS: The Mobile Way – Entertainment for the Mass Market", "Livelihood Enhancement Services (LES): Mobile VAS that is Transforming Lives", "Mobile Applications: The Game Changer", "Mobile Money, the New Currency."

Other key speakers at the session were: Dr. Ajay Kumar, Joint Secretary, e-Governance, Department of Information Technology, Government of India, Mr. Rajan Anandan, Managing Director, Google India, Mr. Sandeep Sawhney, Chief Product & Innovation Officer, Aircel Ltd, Mr. Thomas Clayton, President & CEO, Bubble Motion, among others.

CONFERENCE ON FUTURE OF MOBILE: IAMAI in collaboration of IIM Bangalore organised a one-day public conference on the Future of Mobile on August 31, 2011. The conference was organised at IIM Bangalore and had sessions on Telecom Ecosystem – The Way Forward and Innovation and New Business Model in Telecom. The key speakers at the conference were

Mouli Raman, CTO & Co-founder, OnMobile; Girish Dave Head- Core Network strategy & Marketing Activities, Huawei; Nandu Madhavan, Chief Executive Officer, mDhil I; Vir Kashyap, COO, Babajobs; Siva Ganapathi, Chief Operating Officer, Karnataka, Idea Cellular; Thiagarajan Rajagopalan, VP Products, Roamware; Aviral Pandey, Head-Content Alliances, Apalya; Sunil Maheshwari, CEO & Co-Founder at Mango Technologies Pvt. Ltd; Shriram Adhukoorie, Co-founder, Ask Laila; Amit Dey, Chief Executive Officer, Buongiorno India.



Introduction:

Outside the industry it is a little known fact that digital payment industry, a major enabler of financial inclusion as well as ecommerce, is one of the largest constituencies of IAMAI. Given the highly regulated nature of the industry and the direct linkages between regulation and business development, IAMAI has been active in policy matters since 2007 when the Payments and Settlement Act was passed. Since then the primary focus of IAMAI so far this segment of the digital industry is concerned has been on regulations and policy. For the last four years we have also been organising a public awareness conference on financial inclusion with the support of this group. Here is a summary of our activities and initiatives for the digital payments industry.

Policy:

Digital Payment industry got a new boost from Reserve Bank of India in form of relaxation of limit for Mobile Banking Transactions, opening up of new sector for Pre-paid payments, and opening of Domestic Money Transfer systems for growth of financial inclusion in the country.

- Reserve Bank of India as per their circular dated December 22, 2011 removed the earlier cap of transaction limit of Rs. 50,000/- for Mobile banking transactions per customer per day. As per new guidelines, banks may place per transaction limits based on their own risk perception with the approval of its Board.
- It is advised that it has been decided to permit banks to issue prepaid payment instruments to corporates for onward issuance to their employees, subject to the following conditions:-
 - a. Prepaid payment instruments can be issued only to corporate entities listed in any of the stock exchanges in India;
 - b. Verification of the identity of the employee shall be the responsibility of the concerned corporate. The bank should put in place proper systems to capture and maintain details of the employees to whom the cards are issued by the corporate along with copies of photograph and identity proof of such employees. The corporate is also required to make available details of bank accounts (if any) of the employees to the bank;
 - c. Banks may ensure that the list of authorized signatories approved by the Board of the corporate entity is taken on record and requests from such authorized persons are only accepted for the

- purpose of loading/activating the prepaid payment instruments;
- d. These prepaid payment instruments shall be loaded only by debit to the bank account, which are subject to full KYC, maintained by the corporate with the same bank. Re-loading of these instruments shall also be carried out only by debit to this account;
 - e. The maximum value outstanding on individual prepaid payment instruments at any point of time shall not exceed Rs 50,000/-
 - f. Banks shall facilitate transfer of funds from such prepaid payment instruments to a regular bank account of the concerned employee, if requested for;
 - g. The banks shall be responsible for all customer service aspects related to these instruments;

With regard to Domestic Money Transfer, the release of RBI guidelines dated Oct 5th 2011, NPCI is in the process of providing interface to enable Card to Bank money transfer and vice versa.

IAMAI and members have made frequent representations to the RBI to open up the formal banking channel to facilitate fund transfers of small value through digital mode to give impetus to the process of financial inclusion. This has resulted in RBI issuing guidelines after reviewing the related issues. The relaxations are expected to provide money transfer facilities in a safe, secure and efficient manner across the length and breadth of the country.

The relaxations fall under the following three categories:

- Liberalising the cash pay-out arrangements for amounts being transferred out of bank accounts to beneficiaries not having a bank account.
- Enabling walk in customers not having bank account (for instance migrant workers) to transfer funds to bank accounts.
- Enabling transfer of funds among domestic debit/credit/pre-paid cards subject to transaction/monthly cap.

Business Development:

IAMAI organized the first ever Digital Payment Roundtable in partnership with FINO in Mumbai in June 2011. The main focus of the roundtable discussion was to create a cashless ecosystem in India.

Eminent panellists for the roundtable were Shri K Sivaraman – Reserve Bank of India, Mr Naveen Surya – ItzCash Card, Mr Amir Ullah Khan – Bill and Melinda Gates Foundation, Mr Anjani Rathore – Bharti Airtel and Mr Navtej Singh – HDFC Bank. Mr Kamaljit Rastogi from FINO was the moderator for the session.

Panellists sought to find answers to questions like how will the transition from cash to digital money happen in India?, How to create a product which can compete with cash?, which is the best suited model for growth of digital money?, who will build the ecosystem for smooth functioning?, what are the new emerging business models for digital money?

Members were of the opinion that, gaining confidence in digital money similar to the currency of the nation is the key factor which will drive the digital payment movement in the country. Panellists were of the view that no single business model is sufficient for a vast country like ours. There is a need and demand for various business models to exist and emerge. Over 75 representatives from Banks, NBFCs, Payment service providers, and merchants attended the event.

Market Education:

The annual public conference served as a platform for market education on the role of digital payments in financial inclusion.

4th Financial Inclusion and Digital Payment Conference

The 4th Financial Inclusion and Digital Payment Conference witnessed a convergence of experts from the financial and digital industry with a view to identify and address the gaps in the financial system. At a time when the world is moving towards digitizing cash, the Indian financial system should look at all inclusive growth and this can be propelled by financial inclusion.

Following the success of last 3 editions, this year, the conference was a two-day affair. The main issues discussed at the conference were how to develop innovative business models for financial inclusion, role of digital payments in and delivery models of social and government benefit payments, scope of financial inclusion and empowerment through microfinance, challenges of creating a better user experience in ecommerce payments, current state and way forward for growth of mobile money in India, and interoperability, standardization and convergence of payments.

Eminent speakers included the Naveen Surya - Itz Cash; Mayur Patel – Paypal, Rajat Kathuria - Indian Council for Research on International Economic Relations, Deepali Pant Joshi – Reserve Bank of India, Rahul Bhagat – HDFC Bank, Jayant Sinha – State Bank of India, Surya Mantha – Omidyar Network, Amrish Rau – First Data; Sunil Kulkarni – Oxycash, Joydeep Roy – L&T General Insurance, Samit Ghosh – Ujjivan Financial Services, Debasish Mallick – IDBI Asset Management, Suresh Krishna –

Grameenkoota, B R Bhat – Corporation Bank, Sundeeep Malhotra – HomeShop18, Gary Singh – Nokia Mobile Payment Service, Avijit Nanda – Times of Money, Vishwas Patel – Avenues India and Uttam Nayak – VISA.

Mr. S S Tarapore, a renowned Economist, also addressed the inaugural session.

The conference speakers were unanimous in acknowledging the viable impact of technology and digital payments to increasing financial inclusion in India, where even now an overwhelming majority of the population does not have access to banking services. All speakers accepted that fact that financial inclusion is likely to get a boost based on the coming of age of the telecom industry, and that developers of financial products had started creating products to increase financial inclusion.

Strategic Research

The fourth strategic report that was expected to be released in 2011/12 was titled 'Cash to Cashless'. The report is being prepared by India Development Foundation and is supported by VISA. The report focuses on estimation of cashless transactions and advocacy for going cashless. This will involve:



- Estimation of the amount of cashless as well as cash transactions;
- Identify the major sectors that have cashless as well as cash transactions
- Identify the areas where cashless transactions can replace cash transactions
- Identify the factors that promote or inhibit cashless transactions

We are disappointed to inform you that the report could not be released in 2011/12. However, we expect the final report to be ready by the end of May 2012.



Introduction:

In this chapter we bring to your attention some of the new but critical areas of work that IAMAI has started more recently. While the agenda around each of these themes have not yet crystallised and there is yet to be a systematic and organised approach to them, some important grounds have been covered. It is expected that all three areas mentioned here will be scaled up and streamlined in 2012/13.

Local Language Content:

With internet users in India reaching 100 million and expected to reach 300 million plus in the next three years, and not more than 150 million Indians being conversant with English; it is absolutely necessary that internet content and services local languages are promoted promptly. It is also well-known that the next round of mobile and internet penetration is going to come from smaller towns and villages where local language literacy is predominant.

To move towards more local language content and services a small working group was set up to bring to limelight the issues and challenges faced by the digital publishers for rendering of services and applications in the vernacular. It was realised that the impediments were clustered around two issues: a) lack of standardisation and b) lack of business opportunities for local language publishers online. To address the issue of standardisation, IAMAI has been working very closely with the Department of Electronics and IT to push for an adoption of standardised UNICODE across all local language publishers as the first step. At the bottom of the second impediment are issues related to non-searchability of local content, lack of market awareness and audience measurement for local language publishers and other business issues that are being dealt with simultaneously. The big idea here is to achieve a state where the same content can go across to multiple browsers - print, net, web and mobile. The leadership in this initiative is taken by the leading local language publishers. By the end of the year the local language news portals appeared to take the lead in this initiative and an action plan to move this segment forward has been drawn up.

Since mobile phones seems to be emerging as a the device of preference to access internet in India, the agenda for making local language

content, especially text based content available for mobile is an important. Mobile Value Added Services companies are expected to play an important role here. They would have to actively work towards overcoming the shortfalls in the current platforms and take steps to ensure total compatibility where services provisioning in Local Language are concerned. For the mobile handset manufacturers, standardised key pad, Mobile CSS, applications and transmission (SMS/Content), are all key to success. All stake holders will have to be on board on this.

Policy:

UNICODE is a storage standard which is in an open source format, hence compatible with most systems. Except for the "GRANTHA SCRIPT", all other Indian Languages are supported by UNICODE. Most Indian publishers do not follow UNICODE standards still, even though most of the available, in use systems are Unicode compliant. UNICODE version 6 is still not properly rendered by windows 7, vista and windows XP. tdil-dc.in offers free-of-cost conversion of any previous version to UNICODE 6.

Adoption of UNICODE and following W3C standards will solve most problems being faced by publishers of Indic content across browsers.

Market Education:

In an attempt to raise the general awareness on the urgency of adopting local language on internet and mobile, IAMAI with the full support of W3C held a first of its kind conference sum workshop on March 15 in New Delhi. The Conference was inaugurated by Shri Sachin Pilot, Minister of State, Ministry of Communications and Information Technology, and was very well attended and applauded by the industry.

In his opening address Shri Pilot said, "Internet is still not open, accessible and user friendly to a major chunk of our population due to lack of regional language support. Indian entrepreneurs should look at this untapped market as this opportunity might not be available two years from now." With internet penetration on the rise and Optical Fibre Plan on track, last mile broadband connectivity across the country will be a reality in the next few years. According to Shri Pilot, "Mobile penetration in India is over 800 million with around 53% of it in rural India. This captive consumer, in days to come will be accessing internet from their hand-helds. The time has come to create local language content applications so that people in rural India can easily access information and entertainment."

The newly appointed Secretary, Department of Electronics and Information Technology, Shri J Satya-

narayana, also made his first public appearance in his new role at this conference. In his address he said, " Mobile penetration in India is over 800 million but penetration of internet is only 15%. On the other side literacy rate in English is less than 20% whereas literacy rate in Indian languages is around 50%. Hence, the next big thing is the evolution of Mobile Internet in local languages."

Other session at the conference included: "Challenges of Indic Adoption on Mobile Web"; "Best Practices for building Indic Web content for Mobile Web"; "Enabling mobile & wireless handheld devices in Indian Languages"; "Technology Demo for Deployment of Mobile Based Services".

Prominent speakers included Ajit Balakrishnan, Founder and Chairman of Rediff.com; Alan Bird, Head International Business, W3C, S. Ramadorai, Advisor to the Hon'ble Prime Minister of India, National Skill Council, Gyan Gupta, CEO-Online, Dainik Bhaskar, Venkatarangan Thirumalai, Chairman, Vishwak Solutions, Ramesh A Vaswani, Executive Vice Chairman, Intex Technologies, Abhinav Mathur, Chief Technology Officer, Spice, Muthu Nedumaran, Murasu Systems Sdn Bhd, Malaysia, Sunny Rao, MD, NUANCE.

Cloud Services

In October 2010, the Telecom Regulatory Authority of India called for papers from the industry on various facets of Cloud based services and possible regulatory framework for such services. Many of IAMAI's members at that time submitted learned papers to the Authority suggesting directions on regulations for the development of the industry. Soon after IAMAI reached out to several of its members as well as smaller newly established companies with the intention of forming a working group on Cloud services. Curiously, TRAI soon put the issue of Cloud on backburner and not much movement on that front has happened since then. Likewise, the IAMAI initiative to form a working group could not fly in the absence of sustained interest from the industry. However, the Cloud policy initiative has been taken up by some of the largest industry bodies, and we had before the close of the year two learned papers by CII and FICCI on the subject. Most members at IAMAI are agreed that both the papers talk more about regulation and control and less about creating the right type of environment for this fledgling industry to stand on its feet. We hope that the outcome of these papers would not be a debilitating regulation.

On our part, on the policy side, we would in 2012/13 support a policy which focuses more in developmental and compliance aspects of this industry.

Market Education:

While we have not been able to cover much ground on matters related to Cloud services policy, we have been for the last two years evangelising the market about the benefits of Cloud services through an annual conference targeted at the SMEs.

Free for SMEs

The "Free for SMEs" conference, an annual event of IAMAI, aims to make SMEs aware of the free and low cost cloud based services that add to the core business processes. The 2nd edition of "Free for SMEs" conference was held on 29 July 2011 in New Delhi. This was jointly organised in partnership with IndiaMart. The sessions this year covered areas such as building the right infrastructure, financial needs and technology for the growth of SMEs amongst others. Shri N Ravi Shanker, Additional Secretary, Department of Information Technology, Government of India was the Chief Guest.

Other Speakers were Dinesh Agarwal, Founder and Chief Executive Officer, IndiaMART.com, N K Goyal, President, CMAI Association of India , Member Governing Council, Telecom Equipment & Services Export Promotion Council, Govt. of India, Desi Valli, Executive Director & Chief Operating Officer, Net 4 India Ltd , Atul Sharma, Co- Founder & Chief Technology Officer, KooKoo, Shyaam Sunder, Chief Knowledge Officer, Ramco Systems, Brijesh Agrawal, Chief Operating Officer, IndiaMART.com, Bikky Khosla, Chief Executive Officer, TradeIndia , Amirullah Khan, Deputy Director, Bill and Melinda Gates Foundation, Kartik Taneja, Head India and SAARC Business & Govt Relations at VeriSign India, Dhiraj Garg, General Manager - Cloud Solutions, IBM India, Aakash Goel, Associate, Sequoia Capital, Laveesh Bhandari, Founder Director, Indicus Analytics, Romit Mitra, VP, Marketing and Alliances, 2ergo and Rohit Gupta, VP & Head – Wireless , Tata Teleservices Ltd .

Entrepreneurship Development and Apps Community

Two year back IAMAI included start-ups as one of the categories for IAMAI membership. This was IAMAI's first initiative to welcome start ups and provide a platform to interact with experts in digital space and involve them in the growth of the sector. The digital space is definitely grown rapidly since last 2 years. Keeping this in mind and as part of our continued effort to promote budding entrepreneurs/start-ups in Digital Space, IAMAI formed a "Digital Innovation" working group in 2011/12. The first meeting of the group was held on 5 September 2011 in New Delhi. The meeting was chaired by Alok Mittal of Canaan partners.

The mid-term aim of this group is to choose a "class of 20" start-ups and assist them to augment their business further by mentoring, peer-to-peer linkages, industry networking and connecting with investors through a period of a year. As a first step to connect with the start ups and as a gesture to promote the aspiring companies, IAMAI provided 35 free stalls to the start up companies at the Digital Innovation Exhibition, to showcase their products. The selection was done from 100 entries. Concurrent with Exhibition IAMAI also organized a special workshop for the participants. The workshop was followed by one-to-one meeting with VCs and Start ups. It is hoped that in 2012/13 we would be able to start the next step of our mentorship programme.

Another unique programme for entrepreneurship promotion that was initiated this year was interaction with senior manager and encouraging them to become entrepreneurs. This programme was in partnership with Lightspeed Ventures. A total of three roundtables were held with upwards of 25 managers in Delhi, Mumbai and Bangalore with a view to catch the entrepreneurial spirit of senior executives.



Introduction:

Since 2006, India Digital Summit has grown to become the flagship annual event of IAMAI. Indeed it is perhaps the largest annual gathering of the digital industry in India today. This year the summit comprised a large conference, the award ceremony of the India Digital Awards and a small exhibition of start ups. To give the summit its due credit, this year we are reporting about it in a separate chapter.

Summit:

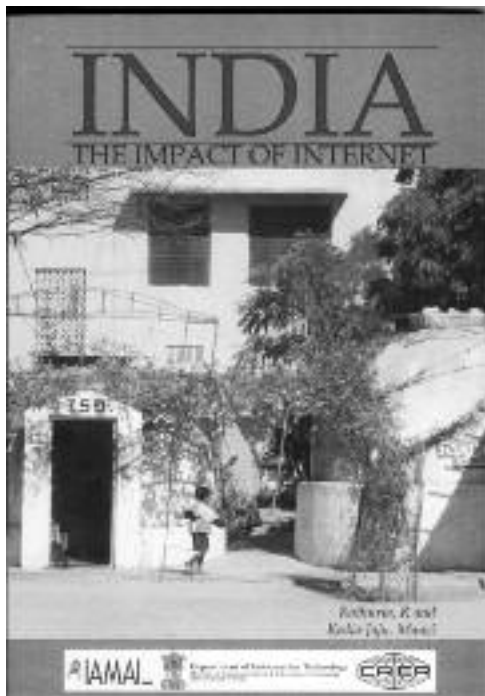
The Summit was held in New Delhi on 18 and 19 January 2012 with the traditional support of the Department of Information Technology. Over 800 delegates consisting of entrepreneurs, CEOs senior executive, brand managers, publishers, advertisers, marketers, government officials, representatives of NGOs and evangelists from across sectors. The 2 day summit had servings for all kind of appetite.

The summit comprised of 2 parts. The main track comprised 8 power-packed Panel Discussions, 3 leadership talks and the launch of the report titled "India Impact of Internet". Sessions covered included "Digital Media: The Big Picture!"; "Mobile VAS: What's New?"; "eCommerce in India: Today and Tomorrow"; "Social Media: Whose Food Whose Poison?"; Leadership Session on "Moving from Memorable to Meaningful"; "The connected home: Device and Service Revolution".

The parallel tracks in the form workshops were organised on the following topics: "M Governance with Sahara"; "Local Language"; Panel Discussion on "Advertising In 2012"; workshop on Investors and Entrepreneurs; "How to use content as a branding tool in digital marketing"; "Mobile Marketing - How can we draw a roadmap". The key industry speakers included: Dr J.S. Sarma, Chairman TRAI and R. Chandrashekhar, Secretary DoT and DiT, Ajit Balakrishnan, Chairman and Managing Director, Rediff.com, Dilip Modi, Managing Director Spice; Rajan Anandan, Google India; Hitesh Oberoi, Info Edge; Mariam Mathew, Manorama Online; Vishwanath Alluri, IMI Mobile; Jay Seth, Air2Web; Sundeep Malhotra, HomeShop18; Muralikrishnan B, eBay India; Harish Bahl, Smile Group; Vinay Gupta, Via; Binny Bansal, Flipkart.com and Anthony Rhind, Co-Global CEO, Havas Digital.

One of the key highlights of the event was the launch of report on "India:

Impact of Internet" released by the Chief Guest Shri R Chandrasekhar, Secretary, DoT and DiT & Chairman Telecom Commission, Ministry of Communications and Information Technology, Government of India. Dr Parthasarathi Shome, Director & CEO, Indian Council for Research on International Economic Relations (ICRIER), Shri N Ravi Shanker, Additional Secretary, Ministry of Communications and IT and Prof. Rajat Kathuria, External Consultant, Indian Council for Research on International Economic Re-



lations (ICRIER) were amongst the others who graced the occasion by their presence.

Awards:

The much scaled up second edition of the India Digital Summit this year covered the entire gamut of commercial activities around internet and mobile value added services. Under the award, outstanding individuals and companies in the digital space are to be recognized annually. This year's awards were



given out in 33 categories covering almost all aspects of the digital industry.

1100 entries were received and vetted by a two-level jury process comprising more than 30 industry experts. In the first round, jury members independently rated each entry purely based on a common judging criteria. In the second round, the entries shortlisted in the first round were evaluated by a Grand Jury. Grand Jury finally determined the winner of each category. There was only one winner in each category and the 1st & 2nd runner up were acknowledged with bronze & silver trophies.

Among the main awardees were: Sahara Next for 'Best Mobile Governance'; Lukup Media for 'Best Digital start-up company or services', Basix Sub-K iTransactions Ltd. for 'Best use of mobile for social and economic development', Mr Sachin Bansal and Mr Binny Bansal for 'Best Internet entrepreneur of the year', Mr Shailesh Rao for 'Best Internet professional of the year', Malayalam Manorama for 'Best local Language website', ibnlive.com for 'Best news content website', Yatra.com for 'Best travel website' and Spice Digital for 'Best mobile Game'.

The awards were given out at a gala ceremony on 18 January. The Award evening had a festive feel to it with performances by the nominees of member companies and included Dancing, Singing, Stand-up Comedy etc. It was a clear display of immense cultural talent of the digital industry.

Exhibition:

The last but not the least component of the India Digital Summit was an exhibition of 30 plus start ups at the Summit venue. In order to encourage and promote digital start up, IAMA ran a selection process from among 100 start ups and gave away free display stalls to 30 shortlisted companies. Among the companies that exhibited this year were: Adepto Solutions Pvt. Ltd., AdoRoi Marketing Science Pvt. Ltd., Amagi Media Labs Pvt. Ltd., Diaspark Inc, Freecharge, GiftSocial, Langoor, MobiGo, Zipdial, octane.in, OneInda.in, REVE Systems, avan-iTV and many more.



Introduction:

Special outreach programmes at IAMAI are those that can be best termed as community services. For the last four years we have been working on three areas: making access to internet much safer to young students; training the local police in detection of crime through cyber trail as well as in detection of cyber crimes and training young people in digital marketing. A brief update on each of these areas is given below.

Safe Surfing:

Now in its fourth year Safe Surfing is perhaps the largest outreach programme of its kind in the country. The programme entails reaching out to any school anywhere in the country where students have some knowledge of internet or use mobile phones and in an interactive manner teach them how to be a safe surfer. This two hour programme module is a great hit among students between classes six and twelve across the country. The message that the campaign sends out is that internet is inherently useful if you use it in a safe way. The success of the programme can be estimated from the fact that we have so far been able to reach more than 6 lakh students between 11 and 18 years of age so far.

In the year 2011/12 we were able to take this programme to schools in Nasik, Pune, Bangalore, Chennai, Ahmadabad, Surat, Delhi, Gurgaon, Faridabad, Dehradun, Lucknow covering more than 50 schools and 75,000 students and teachers.

The initial support for this programme came from National Internet Exchange of India subsequently the programme is sustained by grants by industry.

As a corollary to this programme we also undertook a pilot for Train the Trainer Programme where we reached out to 100 school teachers and trained them in cyber safety for two days with the support of Agra Police and Dainik Jagran.

Police Training Program

This relatively new outreach programme was started in 2010/11 and is in its second year. In course of our many conversations and interactions with local police we had discovered at the operational level the local police were woefully short training and capacity building in detecting nor-

mal crimes through cyber trails. We had also found that there was a significant gap in their knowledge of preventing and detecting cyber crimes. Our outreach programme is a unique combination of both these requirements. In addition, we also provide post training real time assistance in detection of crime to the local police.

In the year 2011/12 we worked with the following local police departments:

- Police Academy Moradabad: We conducted 20 sessions in the academy covering nearly 2,000 officers up to the rank of Deputy Superintendent.
- Haryana Police Academy BPRD Course – We made 3 visits to this police academy to conduct BPRD courses and covered 80 participants who had come from all states.
- Surat Police: At the invitation of the Surat Police we visited Surat and conducted a training programme for 100 officers.
- Gurgaon Police: At the invitation of the Gurgaon

Police we trained 3 batches of local police officers.

- Rohtak Range Police Training: 12 Inspectors of Rohtak Range, Rohtak, Panipat, Jarjhar
- Hissar Police Training: 40 inspectors/ Sub-inspectors
- Greater Noida / Meerut STF – Police Training: 30 inspectors/sub-inspectors
- Air Force Station Bemrauli, Allahabad: 30 Senior Officers
- Training Programs at BIRD (Bankers Institute of Rural Development), Lucknow: 40 Bank managers from IT departments

Digital Marketing Training Courses:

As a part of our effort to address the growing need of manpower by the digital industry IAMAI started this initiative four years ago. In the year 2011/12, IAMAI has been actively involved in training individuals on different courses to inform and educate them on various issues ranging from internet security to digital marketing. Key partners for delivery of the courses are NIIT Imperia, Guts Go and BinaryEdge Education.

We have developed course material which is recognised by the industry. Currently, IAMAI is offering its Search Marketing Scholarship Program through tie ups with ITM Business School, Sterling Institute of Management Studies and Vivekanand Education Society's Institute of Management Studies and Research. We extended our support by further assisting the students to find placement. Communicate2 and AdoRoi are the two member companies which have hired students from this program.



IAMAI is currently offering Advanced Program in Digital Media Marketing, Search Engine Marketing, Social Media Marketing and Digital Brand Management. This year close to 300 students successfully participated in the courses conducted by our partners.

Ajmer Visit

Taking the initiative of National Broadband Plan forward, BSNL has laid the optical fibre network in several gram panchayats in Rajasthan. The IAMAI team, along with the team of BSNL, C-DOT and NIC officials, visited Badlia, Srinagar, Kanpura and Tihari in Ajmer. The purpose of the visit was to see how these villages are reaping the benefits of high-speed broadband connectivity. The villagers said that the most frequent usage of Internet is for birth and death certificate, agriculture related information, job vacancy and filling up forms for various government related jobs, among others.

The IAMAI team was a part of the video-conference in Kanpura in Ajmer, which was connected to other panchayats in Ajmer, West Bengal, Orissa and Goa. Effort was made to create and test an integrated NOFN network between pilot NOFN panchayats which have been given connectivity by RAILTEL, POWERGRID, BSNL for simulating different kinds of network requirement i.e. L1 (physical



media) to L2 (data layer MAC addresses) to L3 (IP addressing network routing) to L4 (end to end data transfer between end systems).





Introduction:

Branding and Communications are an integral part of the work done at IAMAI. As part of the industry branding initiatives, the Association has worked towards building a brand that is credible and represents the larger interests of the digital and the mobile industry. Constant representations before the government and press on topics of importance have been one of the most critical aspect IAMAI's work in the last one year.

Branding stories, articles and interviews in the print, television and online media on various areas of IAMAI's interest and work purview like e-commerce, value added services industry, local language, cyber security have ensured that IAMAI is in the news for all the right reasons. Representing the business interests of 125 plus members, IAMAI has always taken a stand that conform it. IAMAI has believed that a healthy interaction with the media on various contentious issues too helps consolidate and convey the stand it has.

Media Coverage:

Through our constant engagement with the media, our coverage throughout the year has been satisfactory. IAMAI has always believed in the power of media as an effective tool to reach out to the right people at the right time. IAMAI in the last one year has been widely covered by the print, television and on-line media on various policy based issues, trend stories pertaining to the

IAMAI Coverage Break Up July- September 2011

Month	Print	Online	Electronic	Total
July	10	27	0	37
August	2	22	0	24
September	8	23	0	31
Total	20	72	0	92

IAMAI Coverage Break Up- Oct- Dec 2011

Month	Print	Online	Electronic	Total
October	2	19	0	21
November	88	32	1	121
December	17	48	0	65
Total	107	99	1	207

IAMAI Coverage Break Up- January- March 2012

Month	Print	Online	Electronic	Total
January	40	84	3	127
February	12	28	0	40
March	11	29	0	40
Total	63	141	3	207

IAMAI Coverage Break Up
July 2011- March 2012

Month	Print	Online	Electronic	Total
Total	190	312	4	506

aspects of the digital and mobile industry segments. IMAI through constant branding and media networking is now considered as a voice representing the online and mobile value added services industry. Apart from frequently released press releases on the research reports and industry issues, IMAI spokesperson gives frequent inputs to media personnel on issues falling under the purview of online and mobile VAS space.

Owned Media:

"The Week That Was"

"The week that was" is a weekly newsletter brought out by the IMAI secretariat that reaches out to whopping 80,000, who are subscribed to it. The effort is to take up relevant issues on a weekly basis, providing an analytical perspective of the issues, and also report key activities taken up by the IMAI secretariat.

"Thinking Aloud!"

"Thinking Aloud!" reflects emerging trends and varied outlook of the fastly evolving internet and communication sector. A monthly by IMAI, this publication is a part of the market education initiative of the association. The magazine, which incorporates the latest news, trends, and views from industry experts, functions as a one-stop shop for information pertaining to the internet and communication sector. In short, it's a magazine for the internet and mobile industry by the leaders of this industry.

This year, the focus has been to include more pieces that cover the policy aspect of the various areas of interest like VAS, broadband policy and cyber security. The idea was to have more and more industry leaders and brass express their views on the issues to give the readers a holistic idea about what's happening in these areas with respect to regulations and policy. We have also brought out a special issue in the month of January with interviews from internet pioneers in India, which was appreciated by one and all.

Changes have been brought in consciously to include more articles, interviews and viewpoints of industry leaders who can in turn get more and more people to experiment with the online and mobile medium. The magazine serves as a platform that caters to group of people who are yet to adopt this medium for their personal and business needs.

The content overhaul has to a large extent fulfilled the idea of using the print and the online version of the magazine to educate and inform about the medium. With a steady rise in the print and online readership, Thinking Aloud is now recognized as a credible source of information pertaining to the dig-

ital and mobile sector. Thinking Aloud subscription has been on a steady rise. Presently the print version of the magazine reaches out to people that includes policymakers, regulators, IMAI member, CEOs and senior management officials of major corporates and last but not the least people who have not yet experimented with the digital and mobile medium. The online version reaches out to about 2 lakh people. Commercialisation of the print and the online magazine has begun and we have started accepting advertisements.

Online:

The internet is an important marketing channel that reinforces visibility among the target audience. Online marketing takes place across a range of prominent business and media websites.

Website:

Social Networking: IMAI has good presence in some of the leading social networking sites. This helps us reaching the target audience and also helps in promoting IMAI as well as sponsor brands.

SMS Campaign: SMS is another mode of marketing tools used to promote our event. This proved to be quite effective in some of our event. SMS is sent to only opt-in database.

Government Relations Committee:

This year saw IMAI engage proactively with the government towards various policy related issues which can have far reaching impact on the digital industry.

The committee has actively engaged with relevant ministries to offer inputs in various consultation papers that have been released during the year. Extensive meetings have been held to discuss and formulate submission on Electronic Delivery of Services Bill. The Association has held extensive discussion with members and offered inputs for the Triad of Policies by DiT. Subsequent meetings with the NEGP and one-to-one meetings for members have seen a lot of traction on these.

A "Triad of Policies" that are interdependent and addressing the IT, Telecom and Electronics industry was released by the DiT: National Policy on Electronics, National Policy on Information Technology and The National Telecom Policy 2011- this kept the committee for Government Relations busy through the year. Extensive inputs have been offered after multiple meetings with various stake holders, Industry associations and members.

IMAI has taken a proactive step in dissecting the IT Act and creating a "Compliance Document" list-

ing Rules, Compliance Requirements by Intermediaries and Practice And Procedure for Internet Censorship, Under The IT Act 2000. The document has revealed startling lacunae in the Act, which need to be addressed by the Govt at the earliest. The document has been circulated amongst members and will be evangelized and shared with the Government

shortly.

Research Report: India: the Impact of Internet
Chairman of the GR Committee: Deepak Maheshwari - Microsoft

फेसबुक जैसी साइट्स और सर्फिंग तभी ठीक जब आप रहें सुरक्षित, लामार्टीनियर गर्ल्स कॉलेज में बोले साइबर एक्सपर्ट सोच समझकर ही पालें सोशल नेटवर्किंग का चस्का

कुछ
अलग

लखनऊ। ज्योति सिंह सेंगर, लखनौ
रिपोर्टर लिख

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रखें ध्यान



● फेसबुक फोटो की जगह कहीं कहीं
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● फकी फकी पर ऊपर की ओर नफा सर्विंग गिवी होनी। ● फासबू सख न करे
● सोशल साइट्स पर अपने प्रोफाइल और फर्नसल लड़क की साइल ना कीजिए

छात्रों को जितना बचाना ही फिदाक न रहते हैं हैकर

● लैपटॉप की बचनी की एक छात्र ने बताया कि एक लड़का पहले फेसबुक पर
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○ Cyber expert ज्योति सिंह सेंगर ने बताया कि फेसबुक
○ 10 में से एक छात्र को फेसबुक की दुनिया में फेसबुक

ज्योति सिंह सेंगर, लखनौ
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को जाले हैं। फेसबुक में ही अब तक
10 करोड़ यूजर के साथ हैकर्स ने
कुछ न कुछ खेल जमा किया है।
लेकिन वे सोशल नेटवर्किंग साइट को
फर्नसल सोलिय बन लिया है, जो
नुकसानदायक है।
उन्होंने वह भी बताया कि
अभिभावकों को भी ध्यान रखना
होना। बच्चे अलग से किसी से भी
साथी नहीं जोड़कर करते हैं। ऐसा
न हो इस पर अभिभावक को ध्यान
देना होगा। बेहतर तो कि बच्चे के
फ्रेंड लिस्ट में शामिल न हों।

ज्योति सिंह सेंगर, लखनौ
रिपोर्टर लिख

...किया वह बच्चे को हम अपना
फोटो नहीं देते। किसी अनजान
व्यक्ति से जानकारी भी नहीं करते, वो
अपनी साथी जानकारी फेसबुक या
दूसरी सोशल नेटवर्किंग साइट पर
क्यों दे देते हैं? अपने पूरी जानकारी
यू ही क्यों देना अगर वो ही नुकसान
पहुंच सकता है। आज के जमाने में
लगातार छात्र सोशल नेटवर्किंग
साइट्स का इस्तेमाल करते हैं। इन
साइट्स पर हैकर्स अपना जाल

बिछाए रहते हैं और नुकसान सिक्कर
साधकर लेते हैं। उनके एकाउंट
हैक कर अनजान फोटो डाल दिए
जाते हैं। नशीबन बर्तमान साइबर
को ठगने पहुँचे हैं, कई तो
आत्महत्या तक कर लेते हैं।
वह क्यों 'लिनडुन' से वापस में
नुरनार को साइबर एक्सपर्ट रचित
ट्रपडब के लंबाईविषय कक्षा कलिय
में इंटरनेट एंड सोशल
एक्सप्लोरन ऑन इंग्लिश की ओर
से जागरूकता कार्यक्रम में फकी।
रिपोर्टर ने बताया कि हर 10 में चार
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Executive Council



Hitesh Oberoi
Info Edge (India) Ltd
Chairman



Dhruv Shringi
Yatra Online
Vice Chairman



Lakshmi Narasimhan
Web18
Treasurer and Head of
Finance

Governing Council

Amit Garg
HT Media Ltd
Head-Internet and Mobile



Dhruv Shringi
Yatra Online
Vice Chairman



Hari V Krishnan
Linkedin
Country Manager



Sanjay Trehan
Microsoft Corporation
India Pvt Ltd
Head - MSN India

Hitesh Oberoi
Info Edge (India) Ltd
Chairman



Jasmeet Gandhi
Nokia India
Head-Services
marketing



Lakshmi Narasimhan
Web18
Chief Executive
Officer



Mariam Mathew
Manorama Online
Chief Operating Officer

Nalin Shinghal
IRCTC
Director- Tourism
& Marketing



Prashant Mehta
Komli Media
India Pvt Ltd
Chief Executive
Officer



Rajan Anandan
Google India
MD & VP, Sales
and Operation



Rishi Khiani
Times Internet Ltd
Chief Executive Officer

SN Bhaduri
Thomson Reuters
Country Manager,
Consumer media



B Muralikrishnan
eBay India
Country Manager

Member Name	Organisation	IAMAI Designation
Hitesh Oberoi	Info Edge (India) Ltd	Chairman
Dhruv Shringi	Yatra Online	Vice Chairman
Lakshmi Narasimhan	Web18	Treasurer and Head of Finance

Member Name	Organisation	IAMAI Designation
Amit Garg	HT Media Ltd	Head-Internet and Mobile
Dhruv Shringi	Yatra Online	Co-Founder
Hari V Krishnan	Linkedin	Country Manager
Sanjay Trehan	Microsoft Corporation India Pvt Ltd	Head - MSN India
Hitesh Oberoi	Info Edge (India) Ltd	Managing Director
Jasmeet Gandhi	Nokia India	Head-Services marketing
Lakshmi Narasimhan	Web18	Chief Executive Officer
Mariam Mathew	Manorama Online	Chief Operating Officer
Nalin Shinghal	IRCTC	Director- Tourism & Marketing
Prashant Mehta	Komli Media India Pvt Ltd	Chief Executive Officer
Rajan Anandan	Google India	MD & VP, Sales and Operation
Rishi Khiani	Times Internet Ltd	Chief Executive Officer
SN Bhaduri	Thomson Reuters	Country Manager, Consumer media
B Muralikrishnan	eBay India	Country Manager

Rate of Growth of Inet:

This year the number of internet users crossed 100 million, a major psychological and real landmark by any standards. What is even more interesting than this magic number is that all enumerations including that of IAMAI has clearly established that for the first time this year the rate of growth from smaller towns has been faster than the metros and, even more significantly, while it has not yet become a trend, number of people accessing from households has risen faster than people accessing from cyber cafes

Research:

A more contentious issue this year has been the so-called Intermediary Rules published in April 2011 soon after the year began. The subsequent controversy is too well known to be reiterated here. Suffice it to say that there is a general consensus that while extant laws of the land need to be followed by all parties, these Rules need much tweaking in order for them to be practical for the industry to fully comply with them

How does Digital Media influence B2B trade across the world?

This was the topic of discussion at the B2B Marketing series in Bangalore on 5 August 2011

B2B Marketing - Innovate Series III

The last in the series of B2B Marketing Roundtable concluded in Mumbai on 15 September. The roundtable was about Innovative solutions and ideas for B2B companies to build their brand presence using social media to reach the right customers and engage with potential customers

Statistics:

Our research demonstrates that for every 10 percent increase in Internet and broadband penetration, India could potentially add USD 17 billion in GDP. Attaining the targets set by TRAI in the national Broadband plan could generate an additional USD 87 billion in GDP during the period 2012-2014

As of September 2011, there were 112 Mn claimed Internet users in India. 88 Mn users are from urban cities and 18 Mn are from rural villages

Digital Advertisement has increased to INR 2,277 Crores by March 2011 and to INR 2,851 Crores as of March 2012. It is expected that by FY2013 the digital advertisement spends will be INR 4,391 Crores. On an average, the digital ad spends have been growing at 25% year-on-year basis

Mobile Ads accounted for about INR 90 Crores of the total Indian digital advertising industry in March 2011. The share of Mobile Ads has grown by 17 percent, valued at INR 105 Crores in March 2012. This is slated to reach INR 144 Crores by 2013, which will be approximately 4 percent of the total digital advertising, spend

The current e-commerce user base is estimated at around 10 million people. Assuming two users per household, the current overall potential for e-commerce in India including both 'core' potential and 'Low SEC' is 292 million people. Considering this as the base, the current adoption of e-commerce is only 3.5 per cent. In a business-as-usual case, the adoption is expected to increase to 15 per cent of overall potential by 2024-25

Indian e-commerce market is growing rapidly, and is estimated to be worth Rs.46,520 crore or USD 10 billion in 2011

Muralikrishnan B, Country Manager, eBay

“At eBay India, we are committed to evangelising the benefits of eCommerce to consumers, entrepreneurs and brands and IAMAI has been a great partner in this effort. As the eCommerce ecosystem expands and grows and becomes a larger part of the average Indians life, we see IAMAI's role as the voice of the Digital industry becoming even more important.”

Alok Mittal - Managing Director, Canaan India

“IAMAI has done a commendable job in bringing together various participants in the Indian Internet and Mobile services space on a common platform. Right from evangelizing these media to customers, to recognizing and encouraging the frontrunners, and in championing the cause at various fora, IAMAI has lent critical support to the growth of these industries. As the organization matures, I look forward to IAMAI to reset the bar for itself, and play a nodal role in helping solve some of the key underlying infrastructural issues plaguing the industry – right from policy advocacy around growth of these businesses, to enabling substantive intra-industry cooperation around common issues such as payments and logistics. Good job and best wishes!”

Anupam Mittal, Founder & CEO, Shaadi.com

“Over the last few years, IAMAI has emerged as a single voice representing the Internet industry in India and that is a testament to the work put in by the team. As India reaches an inflection point as far as Internet penetration and e-commerce are concerned, an organization whose sole purpose is to grow the Industry by creating awareness and removing bottlenecks, will act as a much-needed catalyst. I congratulate the team in the work done so far and encourage them to drive even harder as we get into, what in my view will be, the most important 2-3 years of India Internet.”

Sanjeev Bikhchandani, iFounder and Executive Vice-Chairman, Info Edge (India) Ltd.

“IAMAI has completed eight years of its existence and since its inception, has played a stellar role in bringing to the fore, the role the digital industry can play in the economy. IAMAI has been at the forefront of influencing policies that would prove vital for the overall development of the digital industry ecosystem, and I wish they continue to play this role in a proactive manner. I wish IAMAI all the best for the coming years.”

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