IAMAI

INTERNET AND MOBILE ASSOCIATION OF INDIA

11TH ANNUAL REPORT 2014-15

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CHAIRMAN'S MESSAGE

Dear Friends,

It was only when the secretariat reminded me about this note that I realized another year has passed by in a jiffy, and also that it is the end of my term as a Chairman of the association. I must admit that these two years at the helm has been exciting, enriching and a learning experience for me.

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 activities that have kept us on our toes for the last one year. As is the tradition at IAMAI, I shall restrict myself to the work of the association while in her role as the Vice-Chairman, Kirthiga Reddy would apprise you of the progress of the industry in general.

The digital industry is now going through an exciting transition. The industry has gained significant momentum and I can today safely assert that this industry will become one of the driving forces of our economy in a few years to come. IAMAI, which has been working persistently towards the growth of the medium, is also growing. Over the last year, it was our plan to engage and interact more closely with the government to ensure that the online industry registers a balanced growth in the years to come and the internet user base widens. I am happy to report that we have been able to achieve both.

Last year was very good for the industry, with a new government, explosive growth in the mobile start-ups and rise of the e-commerce companies. e-Commerce companies' revenues were in excess of INR 25,000 crore at the end of the year. Incidentally, only six years back, there was no single billion-dollar Internet company in India; now there are seven of them.

The country also saw a 10-fold increase in the venture funding that went into Internet companies in 2014 as compared to 2013. More than 800 Internet start-ups got funding in 2014 as compared to 200 in 2012. Dare I say, internet industry has arrived in India!

PUBLIC POLICY

IAMAI has been deeply involved with several public policy debates around the legislations and policies that affect our industry directly or indirectly. Such legislations, I am sure, will not only determine the course of business and investment in India, but will also determine how the present technology is to be used and be made available to the public at large.

IAMAI's focus has been on creating Internet Governance Principles, as the way forward for the evolution of the Internet Governance ecosystem. IAMAI has been actively engaged in indentifying and highlighting the current issues related to internet. The association had interactive engagements with various branches of the Government, Civil Society, Industry and various international jurisdictions.

An important area of work was with regards to the IT Act 2000. IAMAI filed a writ petition in the Supreme Court concerning the Information Technology Act and its regulations regarding Internet intermediaries. There has been increasing uncertainty regarding the regulatory environment for online platforms across India, impacting the Internet economy and the rights of Indian citizens. IAMAI had sought the intervention of the highest court in the country to help resolve these legal uncertainties that harm the interests of Internet users, web innovators, and which run contrary to the safe harbour principle regarding online platforms which Parliament sought to establish. I am extremely delighted to state here that our faith in the judiciary and our persistence to uphold the freedom of internet paid rich dividends, as the Supreme Court, in a landmark judgment rendered Section 66(A) of the Information Technology Act unconstitutional.

The decision was a momentous victory for the 302 million strong Internet users in India. Further, the Supreme Court of India has also "read down" section 79(3)(b) of the Information Technology Act, which strengthens the safe harbour provisions for Intermediaries contained in the Section 79 of the Information Technology Act. I am sure both the judgment together will ensure Internet freedom for users and freedom of doing business on part of Intermediaries; thereby ensuring more innovation and investments in the Indian Internet sector.

This was in a way also a victory of the Legal Intervention and Judicial Outreach Group within IAMAI, which we formed two years back as it was increasingly being felt that the association should raise its level and effectiveness of public policy and advocacy. This in turn would provide for a better and stronger brand building and growth of the association. The Supreme Court judgment, in a way, is a vindication of our sustained effort. However, the job, though well started, is only half done, and there are miles to go, before we can claim victory in its true sense of the term.

STRATEGIC RESEARCH

Better quality research and popularizing IAMAI's industry numbers have been one of the key focus areas of work this year, as in previous years as well. Market and strategic industry research has always been a strong point of the association and this year we have tried to build further on that foundation. I am happy to report that last year our internet user numbers, mobile internet user numbers, e-commerce market size numbers, digital advertising market numbers among many others, have been used for policy making and seems to have found general acceptance for building business cases.

One of the key reports of IAMAI has been the i-cube Internet in India Report. The report findings suggest that there are more than 300 million internet users in India today. This is indeed historic. The Internet in India took more than a decade to move from 10 million to 100 million and only four years to move from 100 to 200 million. From here on, we can hope to develop a robust Internet ecosystem with a multitude of local and global players and a thriving Internet economy.

In addition to market research, we have also published one strategic report on niche areas - India@Digital Bharat, with BCG. The report highlights the fact that the internet user base will cross 500 million by 2018 and that India's internet economy will grow to US$200 billion by 2020 and will contribute 5 percent to the GDP of the country.

Besides the report with BCG, IAMAI has also initiated work on three key strategic research reports on Mobile Internet, in association with KPMG, which is in its final stage of finalization. The report highlights the strategic roadmap for evolution, adoption and growth of Mobile Internet in India.

Besides the Mobile Internet Report, IAMAI has initiated strategic research in other critical areas such as Measuring the Apps Economy with ICRIER; Impact of GST with PwC; Ease of Doing Business in India with PwC; Data Centre Report with PLR; and a report on Proliferation of Indian Language Content on Internet with Feedback Consulting and e-Readiness Index with Indicus.

All these reports will be a key enabler for the industry and the government towards formulating policies for the better of our Industry. Work is in progress for all these reports and the findings will be out during the month of June/July, 2015.

BUSINESS DEVELOPMENT

While the association does not directly help in business development, however, for the last few years IAMAI has been at the forefront of category development through its now well-known roundtable discussions and workshops. This year, we took a step forward by taking the first ever Internet companies' delegation to China and the first ever India Pavilion at the Mobile World Congress in Barcelona.

During the 5-day trip to China, the 23 member strong team, held meetings with leading Chinese e-commerce and internet companies including alibaba.com; ctrip.com; HDT Mobile; Xiaomi, JD.com, Qunar and Google China amongst others.

At the MWC 2015, a dedicated India Pavilion was set up by IAMAI, in which, a number of Indian companies showcased their products and services to a large audience of international business representatives. Top representatives from sectors such as enterprise mobile solutions provider, digital communication solutions, mobile payments, and more, were part of the IAMAI delegation, which was the first ever country pavilion at the Mobile World Congress.

CONFERENCES

IAMAI has been at the forefront in organising pioneering industry conferences for several years now. This year too was no exception. We organized large conferences covering marketing, e-commerce, digital marketing, financial inclusion and digital payments. A special mention must be made on the 9th the India Digital Summit which incorporated the India Digital Awards. The India Digital Summit proved to be huge success this year with more than 1100 delegates attending the event over the course of two days. This year saw more speakers from the corridors of power, including the Minister of Communications, Shri Ravi Shankar Prasad, Minister of State for Skills Development and Entrepreneurship, Shri Rajiv Pratap Rudy, besides host of prominent industry leaders.

The highlight of the event was the speech by Shri Prasad who clearly laid the roadmap for a Digital India in his speech, the vision of which was articulated by PM Narendra Modi, in his capacity as then Gujarat Chief Minister, during his valedictory speech at the 8th India Digital Summit.

Before I sign off and hand over the baton to my successor, 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. I wish IAMAI all the best and look forward to another vigorous year ahead with you.

Sincerely,
Rajan Anandan

VICE-CHAIRMAN'S MESSAGE

Dear Colleagues,

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 10 or 20 years later if someone were to write the history of Internet business in India with the advantage of hindsight, s/he would certainly have to consider the year 2014/15 as an important landmark in many ways. In my assessment below I can do no better than to point out some of those.

Take the case of the number of Internet users, which is a key driver of the continued growth of the industry. This year the number of Internet users crossed 300 million, a major 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, number of women accessing internet is growing significantly. This surely is a sign of growing women empowerment. The rural Internet user numbers too have gone up satisfactorily. Last but not the least, there were clear 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 market numbers of various research reports by IAMAI only reaffirms my faith and belief on the potential of digital industry in India.

One of the most encouraging aspects is the rise of online advertising market in India. The online advertising market in India reached INR 3,575 Crore in March 2015 with a Y-o-Y growth rate of 30%. The online advertising market was pegged at INR 2,750 Crore in March 2014. The share of advertising on mobile and social media is rising exponentially.

Even though traditional media like television and newspapers still remain the preferred media for seeking information and entertainment and hog more than 80% of the advertising market in India, the Internet has been steadily increasing its share of the advertising pie.

The other important trend has been the all round growth of the various segments that constitute the industry. Of course, online retailers have led the charge. Despite minor tremors here and there, e-commerce has continued to grow and attract level headed entrepreneurs, which is why we are seeing heavy investments in this sector and of course along with it, the expected mergers & acquisitions.

The other 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. The "Digital India" initiative of the government to transform India into a digitally empowered society and knowledge economy is very appreciable. It is also heartening that the main backbone of Digital India — National Optic Fibre Network (NOFN) venture, which has not had much success so far, is being monitored by the Prime Minister himself. However, IAMAI is of the view that merely pushing for availability is not enough. Simultaneously, there is a need to design various policies to promote development of local content and applications as well as the need to play an advocacy role.

Some of the recent budgetary announcements by Finance Minister Shri Arun Jaitley will prove to be a key enabler for the overall development of the Internet ecosystem in India. I think we are briskly moving towards a better regime for start-ups and the budget underscores this move after the first set of provision supporting entrepreneurship.

The proposal to reduce taxes on Technical Services from 25 percent to 10 percent with the aim of encouraging tech start-ups is a welcome move and I am happy to state here that in its pre-budget recommendations, IAMAI had requested the Finance Minister to bring the tax rates of royalty/fees for technical services on par with the rates generally prevailing in most of the Treaties India has entered into with other countries. The Finance Minister has heeded to our request.

I also welcome the fact that the Finance Minister has reiterated his commitment to implement GST by next year. This would be beneficial to e-commerce companies. However, a small negative in line with GST implementation is that the service tax has been increased to 14 percent.

Social media is a craze in India today. No one is unaffected by its influence, and we have seen even political parties leveraging social media to put across its message. The number of social media users in Urban India reached 86 million in October 2013, and 91 million by users in the end of 2013.

The other important aspect, besides 300 million Internet users is the rise of mobile Internet in India. The number of mobile Internet users in India is expected to reach 213 million by June 2015, and there were 173 million mobile Internet users in India in December, 2014. What is encouraging is that mobile Internet users in rural India are set to grow at an impressive rate of 33% from October'14 to reach 49 million by March 2015 and 53 million by June 2015.

Digital Payments will remain critical to the success of Internet business in India and towards larger financial inclusion. I am happy to note that digital payments in India is rising and the digital payments industry registered a growth of 40% to reach INR 120,120 crore by December 2014. The digital payment industry was pegged at INR 85,800 crore in December 2013.

While these trends will mean a larger, deeper and perhaps and easier field to play 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 the growth path is not jammed.

A Digital India, where every Indian is connected, is vital for continued economic and social growth. As I write, the relief efforts are still on for the Nepal earthquake, one of the world's worst humanitarian disasters. The Internet has been a huge beacon of hope in so many ways – helping people connect with loved ones, driving awareness of the most critical needs, connecting rescue efforts to those most in need of it. More than 7 million people -- a quarter of Nepal's population – used Facebook's emergency check-in feature Safety Check alone to let their friends know they were safe. Google's People Finder, Twitter, WhatsApp are also being highly leveraged. For social impact like this and the 5 percent GDP contribution that the Internet econony is estimated at by 2018 per the BCG IAMAI report, it is critical we keep a razor sharp focus on the Growth Mantra.

Finally, a word of thanks to Rajan, the governing council, the committees, and the staff of IAMAI for their enthusiasm. I thoroughly enjoyed my stint as a vice-chair at the Association and I now look forward to working with a new set of leaders, to steer the industry as it continues its onward march to glory.

Best,
Kirthiga Reddy

Ravi Shankar Prasad
9th India Digital Summit

CHAPTER 1

PUBLIC POLICY

Last year, we saw a heightened challenge to the industry from the regulatory and public policy perspective. On some issues we were also lucky to have the support of the users on our side. It appears that such challenges are likely to multiply. As the industry grows and matures, many of the foundations on which it is based such as freedom, openness, and innovation are going to be challenged. Given the spread and depth of these challenges, IAMAI's public policy related work is going to expand manifold in the next couple of years.

The key highlights of this year's public policy activities so far as the digital industry is concerned were: the Prime Minister's ambitious agenda of Digital India and the Supreme Court's verdict on reading down of section 79 (3)(b) of the IT Act. The former has created an unprecedented opportunity for expanding digital businesses and connecting Indians and the later has much improved the safe harbour provisions for intermediaries who form the backbone of the digital industry. These two and some other key issues which formed the main thrust of IAMAI's public policy related work this year are discussed in detail in this chapter.

ISSUES

Digital India

Internet industry wants new govt to boost digital culture

HT Correspondent

BANGALORE: India's Internet industry wants the new government taking power after elections to boost public wi-fi points, encourage sharing of spectrum and easier investments in e-commerce to promote digital services and culture.

The Internet and Mobile Association of India (IAMAI) has come out with a 100-day Internet agenda for the new government. The six point-agenda has called for a review of the Information Technology Act and the Copyright Act so as to allow citizens to express their opinions without fear of harassment, help web developers to innovate and ensure conducive environment to conduct business.

THE NEW GOVERNMENT SHOULD LOOK INTO THE REGULATORY HURDLES AFFECTING INDIA'S EFFORTS IN CLOUD BASED SERVICES

IAMAI wants the new government to create 100% "meaningful" Internet access in urban areas by removing hurdles in the large public wi-fi projects and promoting new technologies such as dynamic and shared spectrum through amendments in the telecom policy.

The new government should remove roadblocks in allowing greater investments in e-commerce and should create a favourable environment for angel investors and venture capitalists to invest in Internet startups, said the agenda.

IAMAI has urged the new government to make India a hub of global data flows and processing. "Provide incentives to mobile app technology development and digital finance, while ensuring regulations are not holding back the growth of these industries in India," said the release.

Prime Minister Narendra Modi's ambitious Digital India project has been in the priority list of the government's agenda. The project, with an overlay of Rs 1 lakh crore aims to ensure that government services are available to citizens electronically and help people benefit from the latest ICT. It aims to ensure that all villages avail of high-speed Internet at affordable rates. Besides making government services available on Internet and mobile platforms, the key focus is taking the 2.5 lakh panchayats in the country online. The target of the mission is also to make 10 lakh people digitally literate by the end of 2015. The project aims to provide thrust to nine pillars identified as growth areas. These include broadband highways, everywhere mobile connectivity, Public Internet Access programme, e-governance, e-kranti (which aims to give electronic delivery of services), information for all, electronics manufacturing, IT for jobs and early harvest programmes.

It is well known that the digital media played a crucial role in the 2014 General Elections and its outcome as all major political parties leveraged the medium to reach out to voters and put across their message and vision for the country. In fact, in 2013, IAMAI, in a report, had predicted that social media would have a very high impact in 160 constituencies, out of a total of 543 constituencies involved in the Lok Sabha polls which evinced during the elections.

From the Digital India agenda as enunciated by the Prime Minister it is clear that the government has a progressive approach towards digitalizing the economy and it is in this context that IAMAI had prepared a 100-day Internet agenda for the new government, given the importance of this medium to India's future and efforts to ensure good governance. While parts of the agenda may require continuing efforts beyond the first 100 days of the government, the kick-starting of this effort to have empowered and high level policy-maker engagement on these issues is key to ensuring India's position as an Internet leader. We are happy to note that on some key issues, the needle is already moving and there are some positive signals from the government towards undertaking reform in broadband penetration, building smart cities and providing urban access.

IAMAI is of the view that expansion of internet connectivity to cover 1 billion unconnected Indians is possible by focusing predominantly on a few key areas enumerated in our six-point submission to the government and summarised below:

- **Old Laws and New Technology:**

IAMAI believes it is important to ensure that Indian laws help Internet platform businesses to have a conducive environment to operate. Carry forward reforms to the rules issued under the Information Technology Act and ensure Copyright Law and other laws that are brought in from time to time creates and enabling effect on technology innovation.

- **India's contribution to a connected world:**

Create an environment allowing India to be a hub for global data flows and processing and shaping India's global Internet governance agenda in such a way that we drive global consensus to expand its multi-stakeholder administration and its collaborative benefits for our industry and users.

- **Accelerate the growth of meaningful Internet Access for Indian users and businesses:**

Existing projects like the NOFN should be accelerated using additional support along with stakeholder review of its strategic plan. India's broadband policy efforts need to widen their focus to include the promotion of 100 percent meaningful Internet access coverage in urban areas to bridge the growing deficit there. Telecom policy measures also need to be reformed to promote shared infrastructure models as well as new technologies such as dynamic and shared spectrum, along with removing impediments to large public wi-fi projects.

- **Innovation:**

Safeguard India's digital opportunities by keeping the Internet open and allowing innovation to thrive. Remove roadblocks to greater investment in the e-Commerce sector and look to understand the regulatory and business hurdles affecting India's efforts to be a leader in cloud based services. Provide incentives to mobile app technology development and digital finance, along with ensuring regulations are not holding back the growth of these industries in India.

- **Harnessing benefits for Governance:**

Establish a focused effort around understanding how the Internet and other technologies can help enable greater information sharing, feedback, and transparency in Government using experts from government, industry, and academia.

- **Promote Indian venture capital:**

Make sure the environment is more conducive for angel investments and other sources of funding used by start-ups and Internet businesses in India. Ensure India's financial and commerce policy-makers study the problem affecting the sector and systematically remove roadblocks.

Rajiv Pratap Rudy
9th India Digital Summit

We are happy to report that there has already been some progress made on these fronts. For example, the NOFN plan has moved forward as mentioned by Ms Aruna Sundararajan, administrator, USOF at the India Digital Summit. She mentioned that the NOFN project has accelerated a lot in the last couple of months and it was expected that by March 2015, 30 districts of India would be connected to NOFN thereby providing connectivity to 1,600 gram panchayats. Bharat Broadband Network Limited (BBNL) is planning to complete 50,000 gram panchayats by

December 2015. “To accelerate NOFN project, Prime Minister’s Office (PMO) has instituted a high level committee which will have a comprehensive look at NOFN project and suggest changes in the project. The committee will look into restructuring aspects of NOFN and will focus on network architecture, network design, business strategy, technology, business model and missing framework,” said Sundararajan.

The Finance Minister, in his budget speech, also announced that in order to rationalize the MAT provisions for FIIs, profits corresponding to their income from capital gains on transactions in securities which are liable to tax at a lower rate, shall not be subject to MAT. This was a welcome step and will create an enabling atmosphere of doing business in India.

Also heartening is the fact that the Supreme Court of India has “read down” section 79(3)(b) of the Information Technology Act, which states “upon receiving actual knowledge, or on being notified by the appropriate Government or its agency that any information, data or communication link residing in or connected to a computer resource controlled by the intermediary is being used to commit the unlawful act, the intermediary fails to expeditiously remove or disable access to that material on that resource without vitiating the evidence in any manner”.

Now in the read down version a takedown is only possible, subject to court order or a government order and the reference to “unlawful” in the provision has been circumscribed by Article 19(2) of Constitution of India. This landmark judgment strengthens the safe harbour provisions for Intermediaries contained in the Section 79 of the Information Technology Act. It is especially helpful to smaller companies who will now not be harassed by the frivolous and mal-intentioned notices of the take down.

The setting up of Atal Innovation Mission with an initial fund of Rs.150 crore for research and development is also a welcome step. This platform will foster a culture of innovation, research and development, and is also in line with IAMAI’s pre-budget proposal submitted to the Finance Minister. This will also lead to an improved investment climate.

e-Governance has also been given a boost through MyGov Prime Minister Narendra Modi launched the website that aims to help citizens contribute in governance by giving their opinions and views on important issues like clean river Ganga or skill development.

IT Act


SC quashes section 66A of IT Act

REACTIONS TO THE VERDICT

Since the passing of the Intermediary Due Diligence Rules in 2011, IAMAI had been working with the government to revise some of the more onerous provisions. The Lok Sabha Committee on Subordinate Legislation had also noted lack of precise definitions, weak inbuilt checks and balances existing in the regulatory framework created by these Rules. Also, several Rajya Sabha MPs had formally raised several concerns regarding these rules in 2012. The then Leader of Opposition in Rajya Sabha Arun Jaitley too had raised concerns. He had said on the floor of the House, “Powers are, normally, assumed under these rules on the assumption that they won’t be misused. We feel the pinch only when they are misused. Therefore, I would urge the (IT) Minister to kindly reconsider the language of the kind of restraints that he wants to bring as a result of this notification.” Shri Jaitley had made the remarks while participating in a debate on Information Technology (Intermediaries Guidelines) Rules, 2011, under the Information Technology Act, 2000, in the Upper House on May 17, 2012.

In spite of such multi-faceted efforts, there was no action taken by the government to overcome the defects that were pointed out. This lack of action had prompted IAMAI to approach the Supreme Court so that an objective interpretation of the laws could be obtained. A two judge bench of the Supreme Court of India on August 29, 2014 admitted a writ petition filed by IAMAI concerning the Information Technology Act and its regulations regarding Internet intermediaries. There has been increasing uncertainty regarding the regulatory environment for online platforms across India, impacting the Internet economy and the rights of Indian citizens. This admission allowed the industry an opportunity to argue for a clear Safe Harbour Provision for the intermediaries, which is an essential pre-condition of a thriving digital content business.

IAMAI had sought the intervention of the highest court in the country to help resolve these legal uncertainties that harm the interests of Internet users, web innovators, and which run contrary to the safe harbour principle regarding online platforms which Parliament sought to establish. The petition raised constitutional and other legal concerns. The brief synopsis in chronological order is listed below:

The Writ Petition was filed challenging the vires of Section 79(3) (b) of the Information Technology Act, 2000 (for short 'the IT Act') and Rules 3(2), 3(4) and 3(7) of the Information Technology (Intermediary Guidelines) Rules, 2011 (for short 'the Intermediary Rules') on the grounds of violation of Article 14, 19 and 21 of the Constitution of India.

Intermediaries, as the name suggests, merely provide a path through their platforms, through which users can disseminate information. They play no role whatsoever in the creation, selection or editing of the said information. The content, which could take any form, including text, images, video, is created, authored, developed, procured, edited and uploaded by users of these platforms and is thus referred to as 'User Generated Content' ("UGC").

In 2008, section 79 of the IT Act was amended to provide safeguards for intermediaries from unlawful acts not committed by them. The availability of this safe harbour to an intermediary is contingent on satisfaction of conditions under Section 79(3) (b) of the IT Act. This provision mandates that upon receipt of "actual knowledge" or on being notified by "appropriate Government" or its agency, an intermediary has to expeditiously remove or disable the content that is allegedly being used for an unlawful act. This mandate is referred to as the 'Take Down requirement' and the corresponding notice as the "take down notice". The peremptory obligation on intermediaries under Section 79(3) (b) to disable/take down content without any institutionalised or statutorily defined due process requirements is patently ultra vires Articles 14 and 19 of the Constitution of India.

Section 79(3) (b) was in violation of Article 14 as it is manifestly unreasonable and arbitrary as evidenced from the following reasons:

There is no reason, which justifies the summary removal of material based merely on the notice of a third party or of the Government or its agency.

There is no logic behind making the applicability of exemption under Section 79(1) contingent on removal of material under Section 79(3) (b)

There is no guidance on what constitutes "actual knowledge" that forms a condition to the take down requirement.

There is a complete violation of the rule of audi alteram partem as no opportunity is provided to an intermediary to be heard after the receipt of a take-down notice.

The provision does not envisage an in-built or inherent process or mechanism for judicial application of mind by a Court or a Tribunal to assess the merits of a Take Down notice.

There are no judicial recourses provided to the intermediaries. Once a take-down notice has been received, there is no appeal provision for the intermediary.

Additionally, section 79(3) (b) forms an unreasonable restriction on the intermediary's freedom to carry on its business under Article 19(1) (g) of the Constitution and the user's freedom of expression under Article 19(1) (a) of the Constitution. Further, it does not qualify as a reasonable restriction as envisaged under Article 19(2) for the following reasons:

The State's powers are strictly constrained to limiting the fundamental freedoms under the categories enumerated under Article 19(2).

Restrictions enumerated under Article 19(2) are intended to act as limiting factors to any action taken or proposed to be taken by the legislature or executive only and not UGC.

The restriction under section 79(3) (b) is in excess of its object.

Consequently, it is clear from the above that the conditions for take down prescribed under section 79(3) (b) have the consequence of defeating the legislative intent in providing safe harbour from liability to intermediaries under section 79(1).

Pursuant to the rule making power under sub-clause (c) of sub-section (2) of Section 79 read with Section 87(2) (zg) of the IT Act, Government notified the Intermediary Rules prescribing due diligence guidelines for intermediaries for invocation of the exemption from liability, as provided under section 79(1) of the IT Act. In IAMAI's Petition, Sub-Rules (2), (4) and (7) of Rule 3 of the Intermediary Rules had been challenged as ultra vires Articles 14, 21 and 19 of the Constitution

Net bodies challenge govt's 'take down' orders

Dhananjay.Mahapatra
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New Delhi: Mumbai-based Internet and Mobile Association of India (IAMAI) has moved the Supreme Court questioning frequent, unilateral and arbitrary orders from government asking internet service providers to remove "objectionable" content created and posted by third parties on websites.

The petition, scheduled for hearing on Friday before a bench headed by Justice J Chelameswar, said though internet service providers had no role in creation and posting of allegedly "objectionable" content, they were forced to remove or disable these upon receiving a notice from government under Section 79(3)(b) of Information Technology Act.

> **There is complete violation of rule of audi alteram partem (hear the other side) as no opportunity is being provided to an intermediary to be heard after the receipt of 'take down' notice**
> Petition by Internet and Mobile Association of India

While giving this notice to a service provider, the government was not obliged to give any reason or logic behind the order for removal of the allegedly objectionable content, the petition said. "There is complete violation of rule of audi alteram partem (hear the other side) as no opportunity is provided to an intermediary to be heard after the receipt of take down notice," it added.

IAMAI, through advocate Abhinav Mukherji, said the provision ran contrary to Section 79(1) of the Act which intended to provide "safe harbour from liability to intermediaries".

For the full report, log on to www.timesofindia.com

The Intermediary Rules suffer from the same constitutional infirmities that afflict Section 79(3) (b), and more. Rule 3(2) treats intermediaries which differ in the operating model or the nature of business undertaken or the manner in which users engage with the service as equals. Further, Rule 3(2) (b) is ultra vires section 79(3) (b). While the latter requires an intermediary to summarily remove "information, data or communication link" which is being used to commit an "unlawful act", the former requires the intermediary to peremptorily take down/remove content which is not only unlawful, but also content which infringes any criterion so enumerated in the sub-Rule. Thus, it extends beyond the mandate of the parent section. Further, the criterion so mentioned in sub-Rule (3) (b) is vague and thus, arbitrary. These arguments also apply with equal force to sub-Rule (3)(2)(f), since it goes beyond the legislative mandate of requiring intermediaries to disable content which is 'unlawful' and creates new categories of substantive proscriptions which are not defined anywhere.

Rule 3(4) flows from the requirement under section 79(3) (b). Therefore, all challenges of constitutionality of section 79(3) (b) also apply to Rule 3(4). Additionally, Rule 3(4) dilutes the position of the intermediary by imposing an obligation to pro-actively monitor UGC, whereas such a mandate is absent in the IT Act. In fact, under a literal interpretation of Sec 79(2) (b) (iii), an intermediary stands to lose the immunity/safe harbour protection that is granted to it, if it were to 'select or modify the information contained in the transmission'. Consequently, the mandate under Rule 3(4) is practically impossible to comply with given the monumental volumes of data generated by users on a daily basis.

Rule 3(7), which mandates assistance by intermediaries to Government Agencies, is yet another

Orwellian provision which not only goes beyond the scope of Section 79(2)(c), but is also beyond the scope of assistance that intermediaries are required to offer to law enforcement agencies under Section 69. Additionally, under Rule 3(7), Government Agencies could seek information on users from intermediaries, which in the absence of a substantive law that permits sharing of such information in accordance with principles of due process, would lead to deprivation of the users' right to privacy recognized as being part of Article 21 of the Constitution.

If the impugned rules and section under the IT Act are not struck down it would lead to continuance of the grave injustice faced by the intermediaries. The intention of the Legislature behind amendment of Section 79 in 2008 was to provide a safe harbour and protection of the interests of intermediaries on the whole. Unfortunately, the present use and application of Section 79(3) (b) of the Act and Rules 3(2), (4) and (7) of the IT Rules render this protection nugatory, effectively, defeating the intention of the legislature while also violating the fundamental rights of the Petitioners.

April, 2011

In April 2011 in exercise of the powers conferred by sub-clause (c) of sub-section (2) of Section 79 read with Section 87(2)(zg) of the IT Act, on 11.04.2011, the government notified 'the Information Technology (Intermediary Guidelines) Rules, 2011', prescribing due diligence guidelines for intermediaries, with a view to lay down the standards of due diligence to be observed by intermediaries in order to discharge their duties under the IT Act and to be able to invoke the exemption from liability provided for under Section 79(1) of the IT Act.

Rule 3(4) of the IT Rules 2011 requires an intermediary to "act" within 36 hours of receiving a written notice from an "affected person". In relation to this, in March 2013 a Clarification was issued on 18.03.2013 by government which took the position that the terms, "shall act" in Rule 3(4), merely means that the intermediary shall "respond or acknowledge" to the complainant of the receipt of the complaint, and "initiate appropriate action as per law". The Clarification further went on to state that, in any event, a complaint shall be redressed within a month of its receipt, as required by Rule 3(11).

The ambiguity and vagueness of Rule 3(2) (b) was also called into question by the Lok Sabha Committee on Subordinate Legislation. In this regard, extracted below are the observations from the Thirty First Report of the Lok Sabha Committee on Subordinate Legislation dated 21.03.2013:

"25. The Committee note that Rule 3 of the Information Technology (Intermediaries Guidelines) Rules, 2011 requires intermediary to publish rules and regulation etc. for access of the intermediary's computer resource by any person and that such rules should inform the users of the computer resource not to host, display, upload, modify, publish, transmit or share any information that is grossly harmful, harassing, blasphemous, defamatory, obscene, pornographic, paedophilic, libellous, invasive of another's privacy, hateful, or racially, ethnically objectionable, disparaging, or otherwise unlawful in any manner whatsoever."

Aruna Sundararajan
9th India Digital Summit

These terms have, however, not been defined either in the Rules or in the Information Technology Act, 2000. In the representations made to the Committee, some non-governmental organizations pointed out this and other shortcomings. According to the Ministry of Communications and Information Technology (Deptt. of Electronics & Information Technology) these words / terms are dealt within the Indian constitution and also defined in relevant Indian laws such as Indian Penal Code, Cr.P.C., Prevention of Money Laundering Act, etc. It has also been stated that these words have been interpreted by Hon'ble Supreme Court and High Courts in their various judgements. The Committee drew the attention of the Ministry of Communications and Information Technology (Deptt. of Electronics & Information Technology) to the recent instances of reported misuse of Section 66A of the IT Act due to absence of precise definitions of terms used in the Section. The Committee would suggest that in order to remove ambiguity/misgivings in the minds of the people, the definition of those terms used in different laws should be incorporated at one place in the aforesaid rules for convenience of reference by the intermediaries and general public. In regard to those terms which are not defined in any other statute, these should be defined and incorporated in the rules to ensure that no new category of crimes or offences is created in the process of delegated legislation.

Concerned with these gaps in the Act and the Rules, IAMAI filed a writ petition requesting the following:

Stay the operation of Section 79(3) (b) of the Information Technology Act, 2000;

Stay the operation of sub-Rules (2), (4) and (7) of Rule 3 of the Information Technology (Intermediary Guidelines) Rules, 2011.

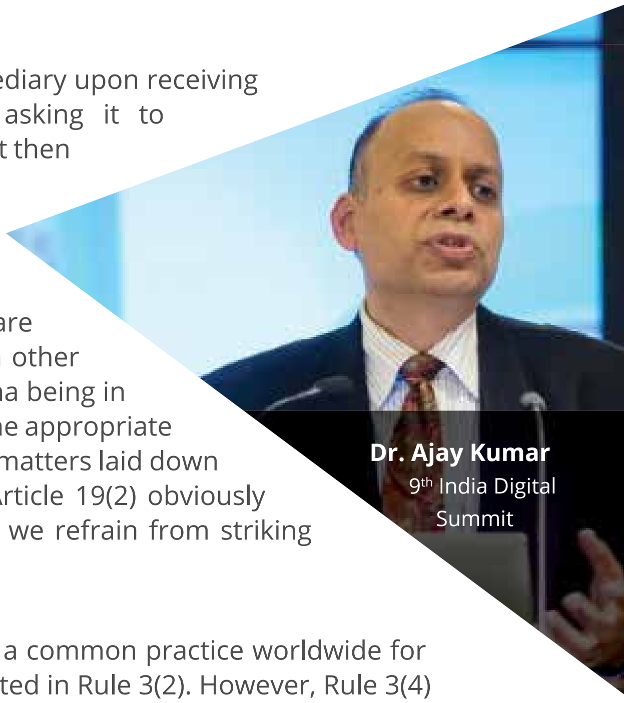
It was the first time IAMAI had intervened in any legal matter. The efforts of IAMAI culminated with a landmark judgment by the Supreme Court of India in March 2015 to "read down" section 79(3)(b) of the Information Technology Act, which states "upon receiving actual knowledge, or on being notified by the appropriate Government or its agency that any information, data or communication link residing in or connected to a computer resource controlled by the intermediary is being used to commit the unlawful act, the intermediary fails to expeditiously remove or disable access to that material on that resource without vitiating the evidence in any manner".

Extracted below are the relevant portions (Para 112 onwards) where Section 79(3) (b) and Rule 3(4) of the Intermediary Rules have been read down:

115.
One of the petitioners' counsel also assailed Section 79(3) (b) to the extent that it makes the intermediary exercise its own judgment upon receiving actual knowledge that any information is being used to commit unlawful acts. Further, the expression "unlawful acts" also goes way beyond the specified subjects delineated in Article 19(2).

116.
It must first be appreciated that Section 79 is an exemption provision. Being an exemption provision, it is closely related to provisions which provide for offences including Section 69A. We have seen how under Section 69A blocking can take place only by a reasoned order after complying with several procedural safeguards including a hearing to the originator and intermediary. We have also seen how there are only two ways in which a blocking order can be passed – one by the Designated Officer after complying with the 2009 Rules and the other by the Designated Officer when he has to follow an order passed by a competent court. The intermediary applying its own mind to whether information should or should not be blocked is noticeably absent in Section 69A read with 2009 Rules.

117.
Section 79(3)(b) has to be read down to mean that the intermediary upon receiving actual knowledge that a court order has been passed asking it to expeditiously remove or disable access to certain material must then fail to expeditiously remove or disable access to that material. This is for the reason that otherwise it would be very difficult for intermediaries like Google, Facebook etc. to act when millions of requests are made and the intermediary is then to judge as to which of such requests are legitimate and which are not. We have been informed that in other countries worldwide this view has gained acceptance, Argentina being in the forefront. Also, the Court order and/or the notification by the appropriate Government or its agency must strictly conform to the subject matters laid down in Article 19(2). Unlawful acts beyond what is laid down in Article 19(2) obviously cannot form any part of Section 79. With these two caveats, we refrain from striking down Section 79(3) (b).


Dr. Ajay Kumar
9th India Digital Summit

118.
The learned Additional Solicitor General informed us that it is a common practice worldwide for intermediaries to have user agreements containing what is stated in Rule 3(2). However, Rule 3(4)

needs to be read down in the same manner as Section 79(3) (b). The knowledge spoken of in the said sub-rule must only be through the medium of a court order. Subject to this, the Information Technology (Intermediaries Guidelines) Rules, 2011 are valid.

119.
In conclusion, we may summarise what has been held by us above: Section 79 is valid subject to Section 79(3) (b) being read down to mean that an intermediary upon receiving actual knowledge from a court order or on being notified by the appropriate government or its agency that unlawful acts relatable to Article 19(2) are going to be committed then fails to expeditiously remove or disable access to such material. Similarly, the Information Technology "Intermediary Guidelines" Rules, 2011 are valid subject to Rule 3 sub-rule (4) being read down in the same manner as indicated in the judgment.

The judgment will herald a new phase in the growth and evolution of the Internet in India and ensure freedom of doing business on part of Intermediaries and freedom for free speech; there by ensuring more innovation and investments in the Indian Internet sector.

Regulation of Internet Applications and Platforms

Internet services and platforms though at a nascent stage, are showing great promise for growth. Such growth will be based on innovation and creativity, which may be dampened by additional regulation. **IAMAI participated in various open house discussions and formal consultations organized by TRAI on this issue. In one seminar that TRAI held to initiate discussion on potential regulation of "over the top" services (OTTs) in August 2014 to "understand perspectives of all stakeholders involved, IAMAI president Dr. Subho Ray said TRAI should not intervene in the eco-system and it should be left to market forces to shape this ecosystem. "It is a business to business issue and TRAI should completely keep out of it."** Paytm founder and CEO, Vijay Shekhar Sharma, said the use of online applications and value added services enhances revenue of telecom companies and consumers already pay for internet they use. "Telecom network must not throttle one service over other. Their network access was to be paid by consumers. Right to access of services by consumer should not be blocked,"

IAMAI made its Submission to TRAI soon after in October 2014 on proposals for Regulation of the OTTs. In the position paper the association recommended to continue with the policy of forbearance from regulation to avoid hurting growth in the sector.

In the past IAMAI participated in various open house discussions and formal consultations organized by TRAI (hereinafter, "the Authority"). Throughout these deliberations it was noticed that the Authority is guided by the principles of ensuring growth in the Telecom Sector as well as safeguarding consumer interest. It is on the basis of these two principles that IAMAI submitted its views on the opportunities for growth and subscriber benefits by an increased adoption of Internet Applications and Platforms.

Section 11 TRAI Act, 1997 expressly contains specific functions of the authority which states under:

Section 11(1) (a) (iv), "(iv) measures to facilitate competition and promote efficiency in the operation of telecommunication services so as to facilitate growth in such services."; and

Section 11(1) (b) (v), "(v) lay-down the standards of quality of service to be provided by the service providers and ensure the quality of service and conduct the periodical survey of such service provided by the service providers so as to protect interest of the consumers of telecommunication service."

Similar objectives are contained in the National Telecom Policy, 1994 and the National Telecom Policy, 1999. The National Telecom Policy, 1999 in its objectives states that:

"(i) to make available affordable and effective communications for the citizens, considering access to telecommunications as utmost important for achievement of the country's social and economic goals;"; and

"(vii) to strengthen research and development efforts in the country and provide an impetus to build world class manufacturing capabilities;"

Similarly, the National Telecom Policy 2012, as its first objective aims to:

“1. Provide secure, affordable and high quality telecommunication services to all citizes”.
In view of the above, IAMAI stated that any regulatory initiatives by the Authority must be premised on the twin objectives of ensuring growth for the telecom sector as well as safeguarding the interest of consumers. In our view any proposed regulation of Internet Applications and Platforms has the potential to prevent growth and result in additional tariffs for consumers without any benefits whatsoever.IAMAI made the following main recommendations in the submission to TRAI in October 2014:

1. Maintain the existing framework on OTT/internet application regulation, as no evidence exists that further regulating OTT Services would increase value to consumers or to India as a whole:
OTT Services are the drivers of growth – in the Telecom sector and in the broader Indian economy – and additional regulation would undermine the innovation, ease of market entry, and openness that have been the foundation of the digital economy. It is in everyone’s interest to maintain a regulatory approach that avoids licensing or registration requirements. Any additional licensing or registration for Internet Applications and Platforms is likely to increase costs, prevent start-ups and entrepreneurs and be eventually to the detriment of Consumers and operators in India.

2. Recognize the value of OTT / Internet applications to consumers, operators, and the broader Indian economy:
Consumers today are availing innovative Internet Applications and Platforms and benefiting from them immensely. Additionally, the value of Internet Applications and Platforms is expected to substantially increase with the focus on e-Government and as Internet Applications and Platforms continue to generate demand and revenue for access providers. Any licensing or registration for Internet Applications and Platforms is likely to increase costs, prevent start-ups and entrepreneurs and be eventually to the detriment of Consumers and Mobile subscribers in India.

3. Preserve transparency and openness in the regulatory process, as such transparency is necessary to maintain an open, vibrant, and productive Internet:
Any discussion on Internet Applications and Platforms should include a consultation and deliberation on ensuring Network Neutrality. Ensuring that access to Mobile Networks is not blocked or degraded, while at the same time permitting Telcos to avail themselves of fair market opportunities, should be considered by the Authority.

However, in spite of our earlier submission and presentations to TRAI, the Authority came out with a Consultation paper titled Regulatory Framework for OTTs in March 2015. This is the paper to which we have made submission and the civil society got activated. The submission strongly argues that the Internet companies are already regulated under the strong IT Act 2000 [Amended 2008], which is the most comprehensive Act covering all aspect of Internet platforms and services. And additional regulatory and licensing norms would cripple tech entrepreneurship and application development. Any regulatory registration or licensing is likely to increase costs and limit the ability of such entrepreneurs to devise innovative products and business models.

Net Neutrality

Net neutrality debate rages on as lobby group accuses Trai of favouring telcos

New Delhi, April 15: As a debate continues on 'net neutrality', the Internet and Mobile Association of India (IAMAI) on Wednesday alleged that TRAI was furthering the agenda of telecom operators on this issue, even as the submissions received by the regulator neared about 8 lakh on the matter.

The telecom regulator has invited public comments on a discussion paper on policy framework for net neutrality and internet-based messaging and calling service providers such as WhatsApp, Skype, Viber and Google Talk.

"It looks like Telecom Regulatory Authority of India (Trai), in its consultation paper, has copy-pasted from submissions of telcos. India has a robust and at times, overbearing IT Act," IAMAI president Subho Ray said.

IAMAI counts global as well as domestic internet firms like Google, Facebook, Snapdeal, Ola, MakeMyTrip and Saavn as its members.

Expressing support for net neutrality, Ray said in a statement that "the paper makes an assumption that internet doesn't come under any regulations, which is incorrect. All Internet companies are regulated by IT Act."

Sources said that Trai has already received 7-8 lakh comments on the discussion paper, floated on March 27.

IAMAI said that its members met on Wednesday to discuss the paper and will submit its response in a week's time.

An intense debate, including on social media platforms, began recently on the issue of 'net neutrality' after some telecom firms, including Bharti Airtel and RCom, announced services that are being billed as going against the concept of maintain equal internet access for all.

Airtel has announced its 'Airtel Zero' initiative, which allowed customers to access a variety of mobile applications for free. The data charges were being paid by start-ups and large companies. *PTI*

The debate on regulating the OTTs as well as Net Neutrality was thrown wide open when TRAI, not heeding to IAMAI and other submission, finally published a suo moto Consultation Paper on “Regulatory Framework for OTTs in March 2015. This paper highlighted the need of regulating the OTT players with a compulsory Licensing or Registration on the following basis:

- The Telcos had financial drop due to OTT communication services.
- The OTT communications are not governed and lead to security concerns.

Chorus Rises: Give Me Neutrality or Give Me Death

IAMAI open house demands less regulation for online, mobile value-added services players

Neha.Alawadhi@timesgroup.com

New Delhi: The Internet and Mobile Association of India (IAMAI) on Wednesday opposed more regulation for the online and mobile value-added services industry, saying it could cripple technology entrepreneurship and application development that have started to flourish in the country, and backed net neutrality.

"There should be an accepted principle within the industry that we support net neutrality fully. We must decide what serves consumers the best, not telcos or internet companies," said Subho Ray, president at the Internet and Mobile Association of India, whose members include Google, Facebook, eBay, IBM and LinkedIn.

At an open house discussion on Telecom Regulatory Authority of India (Trai)'s consultation paper on regulatory framework for over-the-top (OTT) services, which has triggered a debate on net neutrality in the country, participants agreed there was a need to desist from introducing new regulation for the Internet.

Pranav Bhasin, head of product at travel portal MakeMyTrip.com, said: "If there is preferential treatment to anybody, the overall quality of service goes down. Licensing and regulation will take us a few steps backwards, whether it is subsidy or preferential access for first time users."

The Trai paper has drawn widespread flak from Internet and free-speech activists who contend that it favours the interests of telecom companies. Instead, they urged people to join the movement to 'Save the Internet' from telecom operators who want greater control over their network. Several participants said network providers do not give anything for free, and OTT services, which include WhatsApp, Skype and Viber, work on the data networks that consumers pay for.

"Nothing comes free. Domestic and international bandwidth is paid for while using these services. In fact, India ranks poorly in terms of network readiness and the quality of bandwidth is poor," said Amitabh Singhal, member of the governing council at Digital Empowerment Foundation. Some panellists were of the view that existing regulation on telcos is one of the reasons why they break network neutrality.

LOUD AND CLEAR

Trai paper has drawn flak from activists who contend that it favours the interests of telcos

ANIRBAN BORA

- The paper also raises the point that the TSPs are not able to invest in network infrastructure due to the OTTs who are termed as free riders of the Network.
- Additional charges imposition on the OTT communication [Voice and Text]

IAMAI in its submission strongly argued against any additional regulation and stated that a policy of forbearance on regulation [as has been the case so far] should be continued for the growth in the sector and ensure that access to any content on the internet is not blocked or degraded, while at the same time permitting telcos to avail themselves of fair market opportunities and impetus to reduce congestion and invest in infrastructure. Instead of more regulation which can harm innovation and stifle the growth of start-ups, a policy of forbearance on regulation should be continued. This would ensure that content doesn't get blocked or discriminated against. Internet users should have the right to access content without barriers to connectivity being imposed by the carriers of the data, such as the creation of Internet fast lanes and that TRAI should work to protect these rights.

G Padmanabhan
E. D. RBI

Internationally Value Added Services are not regulated and there is no evidence for regulatory evidence exists. Till date, no clear rationale has been advanced on the basis of evidence demonstrating a need for greater regulation or licensing of the Internet services and platforms Sector. The association has pro-actively taken a strong stand on Net Neutrality to help build a consensus around the principles of Net Neutrality for free and open access to Internet without the need for a legislation.

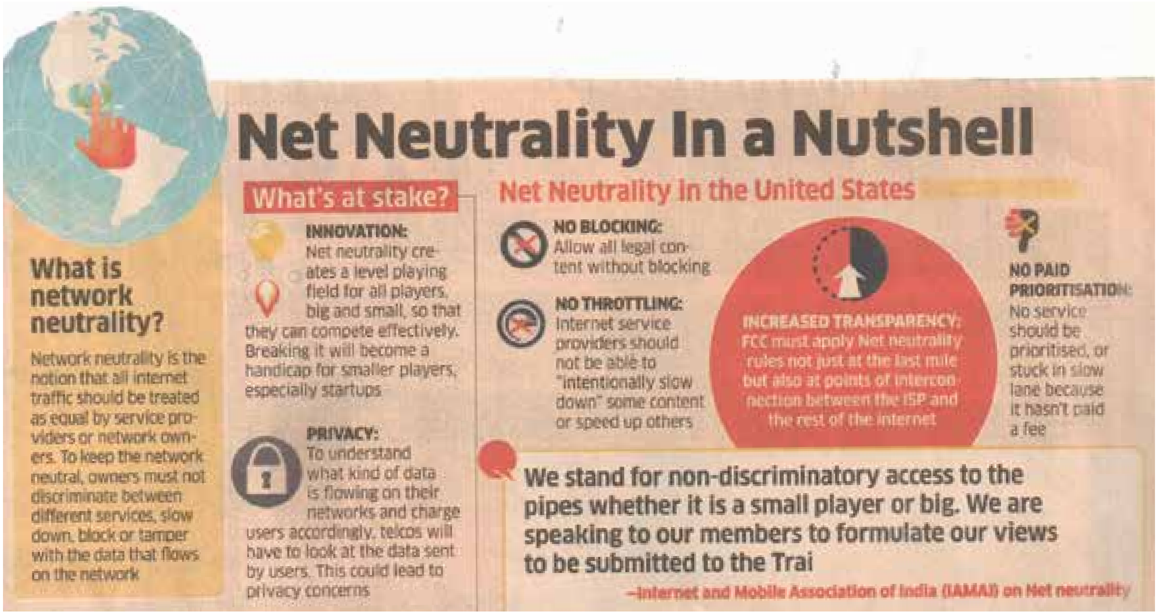
The TRAI Consultation Paper grossly violated the concept of net neutrality by imposing additional charges on the Data usage for communication, which will fragment free and open internet. Net Neutrality or Internet equality is the principle that Internet service providers and the governments should treat all data on the Internet equally, not discriminating or charging differentially by user, content, site, platform, application, type attached to the equipment, or mode of communication.

Net Neutrality principally governs the relationship between TSPs, ISPs and their consumers. The consumers should be given unfettered access to content and services once they have subscribed to data services. "Unfettered" in this case would mean:

a) no blocking
b) no discrimination
c) no throttling
d) no fast and slow lanes from the consumer's perspective

IAMAI recommended that rather than a separate law of "fiat", this should be a part of the QoS of the TSPs – their commitment to their consumers.

Net Neutrality is important for human rights and society and IAMAI strongly believes that India needs less of regulation which will be the key to safeguard the free and open internet and bring innovation in the cyberspace. Improved investment in networks is primarily dependent on the Government outlook towards the TSPs rather than on the relationship between TSPs and the Internet content and services companies. Some of the most important ways in which a conducive and balanced environment can be created so that the TSPs are able to invest in network



infrastructure as suggested by the association and also a large cross section of industry and experts are:

- Lower Spectrum cost
- Improved design of Auctions
- Spectrum sharing, trading and swapping
- Easier roll out norms
- Rights of way for TSPs and
- Government support for rural expansion of TSPs

IAMAI's Broad Submissions are:

a. There should be no legal framework between the Internet content and app services and the Telcos and their relationship should be left to market forces.

b. Internet Content and Services Companies should not be licensed. Any licensing/registration requirement will have extreme negative repercussions, especially with regard to innovations and newer technologies.

c. Internet Content and Services companies should not pay any revenue share to TSPs [the consumers already pay for bandwidth and Internet companies also pay for hosting services to one or the other ISPs].

d. Net Neutrality must be maintained. Net Neutrality comprises the following:

- no blocking
- no discrimination, positive or negative
- no fast and slow lanes from the consumer's perspective.

e. There is no regulatory imbalance between TSPs and ISPs on one hand and Internet content and services companies on the other. The latter follow all the laws of the land and in addition are comprehensively regulated by the IT Act 2000 as amended in 2008.

The extensive debate over this issue globally has brought the attention of the regulators to the situation in India in recent months. But unlike in many parts of the world where Net Neutrality is a law, the Internet penetration is already very deep and hence their dynamics are completely different from India. The DoT has set up a committee to look into the matter. The recommendation of this government committee is expected to be published sometime in May.

Broadband Policy

The World Bank estimated that for every 10 percent rise in broadband access, economic growth increases by 1.38 percent in low-and middle-income countries. The IAMAI-ICRIER report also highlighted that a 10 percent increase in broadband penetration in India will lead to a 1.08 percent increase in its GDP contribution.

High-speed, transparent and affordable access to the Internet are all basic necessities, as it will enable all Indians to access education, healthcare, and employment, and to exercise the fundamental right to freedom of speech and expression, thereby boosting social and economic development. IAMAI had made a few submissions to DoT on "Pushing Broadband Penetration" and TRAI on Broadband Policy for a faster proliferation of Broadband with a sound and concrete policy framework. The main aspects that IAMAI put thrust on its submissions were:

a) Liberalization of Spectrum [white spaces and unlicensed spectrum]
b) Liberalization Infrastructure Policies
c) Free and Open Internet to recognize and realize the "Right to Broadband"
d) To create regulatory certainty, simplify the licensing framework, and eliminate price barriers.
e) To promote the use of broadband to deliver governance

In its submission, IAMAI focused on the need to allocate sufficient spectrum to meet fast-growing demand for mobile Broadband. It is important (especially for non-urban areas) that government views spectrum as a Broadband enabling resource and not merely a revenue generating exercise. The association also suggested that the government should periodically re-evaluate spectrum allocation to identify underused or unused spectrum and reallocate it for/allow efficient use in each market. And that the policies regarding spectrum sharing, trading, re-farming and proposals such as mobile virtual network operator (MVNO) should be finalized. This may allow smaller players, without the wherewithal of the TSPs for spectrum auctions to provide broadband for select markets where they enjoy relative strengths.

E-Commerce

The e-Commerce sector has witnessed tremendous growth in terms of GDP contribution and employment generation during previous year. Despite achieving substantial growth figures, the sector is still at an early stage of development and has been struggling with complex tax norms and inter-state taxation rules. These complex tax rules have made operations not only difficult but to manage and stay compliant to the Indian Tax Code a difficult proposition. In the absence of a uniform tax policy across the states and till such time, GST is implemented; it is becoming increasingly onerous for the e-Commerce companies to carry on their operations, which is hurting the buyers, sellers and other marketplaces. The lack of understanding of the business models of the E-commerce business models is leading to imposition of taxes under the forced title of 'commission agents', which again under the current FDI law in the sector is contradictory.

E-commerce Marketplaces just provide the technology platform and software/tools enabling third party sellers to offer their goods for sale to end-customers. Since the E-commerce Marketplace is a technology platform, it does not engage in any trading activity on its own but facilitates the sale and purchase between independent buyers and independent sellers, who enables the users of the E-commerce Marketplace to do so. E-commerce marketplace's relationship with the Sellers is on a principal-to-principal basis and they do not buy or sell on behalf of the sellers.

IAMAI's ecommerce related work this year has been to clarify this issue with the state governments and to even out some of the state level taxation issues that faced the ecommerce market places. IAMAI has made a representation to the governments of Maharashtra, Uttar Pradesh, Kerala, Karnataka, Tamil Nadu and Delhi in this regard. Non-uniform tax environments in specific states and IAMAI's intervention are mentioned below:


DIGITAL COMMERCE

Online retail revenue to match income from online travel by 2016

▶ Maharashtra

In Maharashtra goods bought by end customer carried into the state by courier companies / transport companies were being seized in various cities by the LBT authorities. The demand was, that the E- commerce company or the courier / transport company to be registered as a Dealer under the Maharashtra Municipal Corporations Act, 1949 (Act) and discharge the payment of LBT on all such consignments.

An industry representation was made to the Minister of Finance, Maharashtra in February 2015 on the issue of the Local Body Tax [LBT] imposition on the consignments delivered to individual buyers in the state by e-Commerce marketplaces. IAMAI requested for suitable clarification/direction to be issued to the effect that e-commerce company or the courier/transport Company importing goods into Maharashtra do not qualify as a dealer, as per the provisions of Section 2(16A) of the Act and therefore are not required to discharge LBT on the goods delivered by them to the individual buyers/ consignee located in the municipal limits of respective cities. Suitable clarification/ instructions should be issued that in cases, where the import of goods has been caused by the individual buyer, towards the sale concluded before the import of such goods, no LBT should be payable, as the individual buyer importing the goods for personal consumption does not qualify as dealer.

The Finance Minister's decision of scrapping of Local Body Tax (LBT) from August 1, 2015 comes as a huge respite to the e-Commerce players in the state; however IAMAI is now actively seeking for government intervention to waive the retrospective notices as and to ward off any expected coercive actions till LBT is scrapped.

▶ Karnataka

Similarly, in Karnataka, due to a continued non-resolution of tax interpretations for the e-commerce industry, the e-commerce companies find themselves in a difficult situation of holding back their expansion plans within the state and also holding back new investments into the state. There is a proposal under consideration by the Karnataka VAT department to make e-commerce marketplace operators responsible for computing and paying taxes on behalf of all sellers using the e-commerce marketplaces which is cumbersome. The goods are being sold by the seller/dealer to the customers on a principal to principal basis. Under the current model where the seller is making a sale directly to the customers, the current VAT laws of the state of Karnataka do not provide for such a model and there is a simultaneous impact on other regulations (for example Foreign Direct Investment policy and RBI regulations) governing the conduct of such E-commerce marketplaces.

To optimize benefits from e-commerce marketplaces and to add to the technology investments in the state of the State, it is important that there is an urgent resolution of the issue. It is estimated that using the platform of a large E commerce companies the state could have collected more than Rs. 100 crores of revenues last year if the E-commerce marketplaces and the sellers had not have faced the tax challenges in Karnataka.

IAMAI in its representation to the Department of Finance and Commercial Taxes, government of Karnataka proposed a transparent and collaborative solution whereby marketplaces can provide specific data (relating to sales on the e-commerce marketplaces) under an arrangement with the sellers to the department which can corroborate the monthly filings of the respective dealers (as they relate to sales on the e-commerce marketplaces) within the state.

▶ Kerala

In the state of Kerala, the ambiguity is related to Kerala VAT on Cash on Delivery consignments. The

Kerala State Government has been blocking goods which have COD as a payment option. They are taxing the goods at the point of delivery which is amounting to double taxation as CST has already been paid on these goods. As per the tax law a merchant is required to pay the tax/CST at the origin of the sale not at the point of delivery.

▶ Uttar Pradesh

The Commercial Taxes Department of Uttar Pradesh ('UP VAT Department') is currently securitizing that e-commerce marketplace companies be construed as 'Dealers' under the provisions of the UP Value Added Tax Act, 2008, and thereby VAT/CST is applicable as payable by the marketplace companies for sales /transactions effected by merchant vendors in the state of UP through their online portals. The UP VAT department are of the view that since marketplace players or courier companies (on behalf of market place player) are collecting money on behalf of the merchant vendor, the market place player qualify to be a 'dealer' as per the definition of dealer under Section 2(h) of the of UP VAT Act.

IAMAI in its submission to the Chief Secretary and Infrastructure & Industrial Development Commissioner, government of Utter Pradesh represented that this way of interpretation as perceived by the UP VAT department is having an adverse impact on the e-commerce businesses in the state and requested for immediate attention and support on the subject to help resolve the issue. The submission stated:

- The market place player are not acting as agent of the merchant vendor and the arrangement between the parties is on a principal to principal basis for provision of fulfilment services which inter alia comprises of advertising the products to be sold by merchant vendor by displaying the products on the online portals of the market place player.
- Further, specifically from a VAT law perspective, an agent liable to VAT is an agent who sells goods on behalf of a principal. In the instant case in addition to not qualifying as an agent, market place player do not have any authority to sell the goods of the merchant vendors on their behalf or even on their own.
- From the description of the activities provided above, it is evident that market place player only provide a marketing platform or portal to the merchant vendors for displaying and providing a series of services in relation to the sale of their products by them to their customers.

Therefore, it was submitted that any proceedings or attempt to levy VAT by the department against a marketplace player, has been initiated on an erroneous inference that the department may exercise jurisdiction on transactions/sales effected through market place players, simply because delivery of goods occurs in the state of UP. It is reiterated that any such proceedings would not be well-founded under law and are not amenable to the jurisdiction of the UP sales tax department.

▶ Delhi

In Delhi the e-commerce marketplaces do not and cannot act as a seller and/or commission agent on record for the products that are offered for sale to the end-customers on the website since it is neither factually correct, nor E-commerce marketplaces are permitted to sell goods to end customers as part of an online B2C e- commerce transaction due to the restriction under the extant FDI policy. Intra-state VAT liabilities, to be deposited by sellers, are being passed on to e-commerce marketplaces.

Inter-state consignments are subjected to seizure and incidences are becoming rampant, for both, prepaid and post-paid- Cash on Delivery (COD) consignments that are ordered by the end customer for self-consumption. Since, the tax liability on these is already being discharged by the seller in the state of origination marketplaces shouldn't be asked to pay for the tax again.

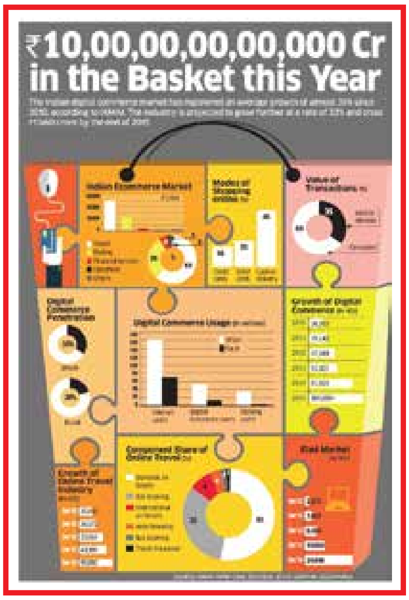
Most of the states/municipal corporations require forms for the movements of the consignments even though the consignments that are brought in are for self-consumption failing which the consignment is seized. IAMAI in the submission recommended that responsibility to charge and deposit VAT shall continue to lie with the Sellers. Uniformity in non-taxable de-Minimis, for end consumers and standardization of documentation process across all states should be enacted. Having the online standardized systems/forms will improve the efficiency and enable better integration of the whole process till GST is implemented.

The consumer affairs ministry proposed to create an agency similar to the US Federal Trade Commission, known as the Consumer Protection Authority. To strive at the objective, on 5 November, 2014, the Ministry of the Consumer Affairs issued a draft which discusses the proposed amendments to the Consumer Protections Act, 19863 ("Act").

A new Chapter III after the existing Chapter- II is proposed to be added to the Act which establishes an executive agency, namely "Central Consumer Protection Authority" that enables prevention of exploitation of consumers and violation of their rights and to promote, protect and enforce the rights of consumers. The basic objectives of the formulation of such a body are

i) to protect and enforce the rights of consumers such as the right to be protected against the marketing of goods / products and services which are unsafe or hazardous to life and property,

ii) the rights to be informed about the quality, quantity, potency, purity, standard and price of goods or services,



iii) to prevent unfair trade practices as defined under Section 2(1)(r) of the Act, iv) to ensure that no advertisement is made of any goods or services which is misleading or deceiving or contravenes the provisions of this Act and rules and regulations made under it and v) to ensure that no person engages himself in unfair trade practices or takes part in the publication of any advertisement which is false or misleading.

The proposed amendment attempts to include e-commerce transactions under the ambit of the Act. Under the current consumer protection regime, a consumer can initiate legal action against a seller only in the place where transaction takes place. However seeing the increasing trend of online shopping in India, the Government planned to propose amendment to the Act in order to allow 'territory free' legal action against any goods or service provider.

Some of the provisions included in the draft especially with regards to e-commerce transactions and intermediaries were detrimental to the business. The new sub-clauses under Section 2(1) (r) are proposed:

'after selling such goods and rendering of such services, refuses to take back or withdraw the goods or withdraw or discontinue the service and refuses to refund the consideration thereof , if paid, within a period of thirty days after the receipt of goods or availing of services it is so requested by the consumer.'

IAMAI, in its submission, stated:

The provision should be amended keeping in view that an intermediary cannot be held liable as envisaged in this clause. The clause should include that – if the refusal to take back goods or pay the refund is by the SELLER of the goods'.

Time period for resolution of the customer complaint for returns or refund has been proposed to be included in the clause itself. Our processes will need to adhere to this timeline.

Businesses that operate as intermediaries, should clearly indicate in its User Agreement, Terms of Use to the consumer that the consumer purchasing any goods or services transacting on the website of such intermediary is purchasing such goods/services from independent sellers.

Access of Online Pornography in India

It has been claimed by several petitioners that two-third of the India's online population is below of 35 years and is getting digressed, distorted and distressed on account of the growing free sex culture through cyber pornography. Cyber pornography is creating an extremely bad effect on the adolescent children and even adults giving rise to various types of problems of psycho-physical nature, Sexually Transmitted Diseases (STD), sexual deformities etc. This is also instrumental in rising incident of sexual exploitation of children.

A Parliamentary Committee decided to look into the aspect of cyber porn and into ways to check

India's only cyber appellate tribunal defunct since 2011

INOPERATIVE Cases referred to the body were adjourned due to non-availability of chairperson ever since the previous judge retired

Soibam Rocky Singh

NEW DELHI: The first and only cyber appellate tribunal in the country has been lying defunct for the last three years. The tribunal has not adjudicated a single case since June 30, 2011 when the previous chairperson Justice Rajesh Tandon retired.

Each case that comes to the tribunal has been adjourned on the ground that there is non-availability of the chairperson and the member (judicial) to pass judicial orders.

When the tribunal was setup in October 2006, it was seen as a specialised forum to redress cyber frauds.

It was conceived to adjudicate cyber crimes and disputes such as hacking, sending of offensive or false messages, receiving stolen computer resource, identity theft, cheating by personation, violation of privacy, domain name disputes and other cyber fraud cases.

However, the tribunal has been vested with the same powers as a civil court, the cases requiring punishment instead of financial penalty are transferred to the magistrate concerned. But, this does not explain the dismal number of cases filed at the tribunal. As of today, there are only 33 cases pending at the tribunal. Four cases were admitted in 2012, ten last year, and eight in 2014.

A survey conducted recently by the Internet and Mobile Association of India (IAMAI), projected that the Internet user base in the country is to touch 243 million by June 2014. This growth of Internet users has also led to a substantial growth in other digital industries such as e-commerce. This has led to a spurt in cyber frauds cases.

As per latest data available with the National Crime Record Bureau (NCRB), a total of 2876 cases were registered under the Information Technology Act in 2012, a sharp increase from 1791 in 2011.

But not all cyber fraud cases are reported.

This seems to be true for not only individuals but also for companies.

There is very little knowledge on the different kinds of cyber crimes, the laws governing them, and the redressal forums.

And the national appellate tribunal remaining non-functional for three years has not helped either, as it has forced cyber fraud victims to approach the high courts, which are already overburdened with case pendency, for remedy.

Central government counsel Sumeet Pushkarna said the selection of the chairperson and members of the tribunal is made by the Centre in consultation with the Chief Justice of India. He had informed the Delhi HC on May 29 that it will take eight weeks to appoint the chairperson.

ILLUSTRATION: ABHIMANYU SINHA

it amid complaints that it is "distorting and distressing" the society. The Committee on Petitions of the Rajya Sabha took cognizance of a plea made to it, seeking a check on cyber pornography by amending the IT Act, 2000.

Mandate and the Scope of Inquiry of the Committee:

"...It has been stated in the petition that more than two-third of the India's population is below of 35 years. This large section of the population, which is the hope for the country's future, is getting digressed, distorted and distressed on account of the growing free sex culture through cyber pornography. Petitioners have further stated that Cyber pornography is creating an extremely bad effect on the adolescent children and even adults giving rise to various types of problems of psycho-physical nature, Sexually Transmitted Diseases (STD), sexual deformities etc. This is also instrumental in raising incident of sexual exploitation of children. Today, besides computer and television, the mobile phone has become a very handy source for adolescents to view such porn sites.

The petitioners have made a vehement prayer that steps be taken to check cyber pornography which is having an extremely bad effect on the country's youth as well as the adults leading to various types of social and medical problems as well as perpetration of crime. In this connection, they have advocated for amendment in IT Act 2000, so as to make pornography on computer/mobile a crime entailing severe punishment to the producers, distributers and viewers of such sites."

It is relevant to note that the Rajya Sabha when framing rules for the Petition Committee has been cognizant that representations may include matters which are pending before courts. Conscious to avoid any overlap or conflict, the Rajya Sabha Rules, specifically Rule 138 with respect to the Petitions Committee envisaged that the Petitions Committee may not hear any matters which are sub-judice. In view of the Kamlesh Vaswani PIL pending in the Supreme Court of India, the Petitions Committee may consider awaiting the decision of the Court as per its own rules of procedure.

Existing legal provisions:

At present the governing law with respect to online pornography is principally contained within the Information Technology Act, 2000. This enactment contains various provisions which prohibit the transmission of pornography. These include Sections 67A and Section 67B. Section 67A contains the punishment for publishing or transmitting of material containing sexually explicit act in electronic form and provides for a punishment of 5 years of imprisonment for the first conviction and 7 years for every subsequent conviction. Section 67B provides for a punishment for publishing or transmitting of material depicting children in sexually explicit act in electronic form and provides for a punishment of 5 years of imprisonment for the first conviction and 10 years for every subsequent conviction. Section 67B also criminalises the access and viewing of child porn. It is pertinent to mention that these provisions were inserted after comments by the Parliamentary Committee on IT made a report on the proposed amendments to the IT Act stated that provisions should be inserted to make it consistent with advanced Countries and Article 9 of the Council of Europe Convention on Cyber Crimes.

These provisions drawing from Section 292 of the Indian Penal Code, 1860 seek to punish the publication and distribution of pornography which is consistent with the principles of criminal liability applying to pornography circulated through other mediums. In this respect the interpretation of Courts on the subject has been as well to punish the publication and transmission of pornography rather than its receipt and viewing (with the exception of child porn). This view has been clearly stated by the Bombay High Court in its judgement in Pratibha Naitthani v Union of India, AIR 2006 (Bom) 259 and the Madras High Court in V. Sundarrajan Vs State of Madras (Cri.P.C. No. 376 of 1978).

Given the existence of a general law for obscenity and a specific law in addition to it for online pornography, the legal provisions for preventing access to pornography are present in Indian law. These substantive offences are comprehensive and data from the National Crime Records Bureau in its report, Crime in India demonstrates a majority of prosecutions for offences under the Information Technology Act, 2000 are for offences related to obscenity.

Exemption from Intermediary Liability:

As outlined above the existing criminal liability for pornography in law applies only to publication and distribution. However, the Information Technology Act, 2000 carves out an important exemption for internet intermediaries which only play the role of facilitating transmission of content (as opposed to creating or authoring content), under Section 79 of the Information Technology Act, 2000.

Section 79 which was amended by the Information Technology (Amendment) Act, 2008 has, as noted by the Parliamentary Committee on review of the IT Amendment Bill, 2006, been strengthened to give greater immunity to internet companies who often are not more than conduits for transmission of data and services.

Hence, as a general principal, Intermediaries under law are exempted from liability under Section 79 as long as the information does not originate from them and they do not modify it. This important limitation preserves their function as a mere conduit and is consistent with their principal under law. To limit the transmission and posting of illegal content, which includes pornography, Section 79 mandates that on receiving knowledge of such content the intermediary shall take down the content expeditiously.

It is also pertinent to mention under a Bombay High Court Order dated 13 February, 2002 in Writ Petition Number 1611/2001, the issue of limiting access of pornography through such intermediaries has been examined at a technical level as well. Through the Order dated13 February, 2002 a report which was adopted by the Court held that it was technically unfeasible to pre-screen pornographic websites and even if such a unscientific screening through technical protocols was implemented by internet companies it would lead to large deprivations of the right to freedom of speech and expression guaranteed under Article 19(1) (a) of the Constitution of India. If asked we would be happy to provide international case studies to support our argument.

Further steps to prevent online pornography:

It is pertinent to mention that pornographic content is not available or distributed through IAMAI members but through independent standalone websites. These standalone websites are often hosted on servers independently and are not within the technical control of IAMAI members. In this respect the government of India has often issued requests to block access to specific websites or webpages under applicable provisions of the Information Technology Act which have been implemented both by ISPs as well as by IAMAI members, as appropriate. Given the existence of legal provisions for seeking disabling of sites with content that violate the mandate of law, appropriate authorities have sufficient options to ensure that illegal content of any kind including content that may be pornographic in nature, without requiring additional legal provisions.

Further IAMAI members provide for detailed Terms and Conditions of use and program polices as per the nature of services provided by them and the level of engagement of end users with these services. These Terms and Conditions of use may also prohibit the hosting, display, or linking of adult content. Members apply these policies strictly and consistently to ensure compliance with the policies. In cases where such content is posted in contravention of the Terms of Service, member companies expeditiously take down content and on repeated violations even disable access of the user account indulging in such abuse. It is pertinent to mention that similar policies also exist for advertisers and no pornographic or explicit advertisements are permitted as per the Terms of Service.

On the concerns on child pornography IAMAI also invited the attention of the committee to the Protection of Children from Sexual Offenses Act (hereinafter, "POCSO"). POCSO which was enacted in 2012 contains specific legislative provisions to prohibit the creation and distribution of child pornography. It has also constituted the National Commission for Protection of Child Rights which includes in its activities the constitution of expert groups, prescribing guidelines and creating and running awareness campaigns. It is suggested further views and suggestions may be invited from the National Commission for Protection of Child Rights to strengthen any measures to combat child pornography.

Recommendations:

In view of the above IAMAI recommended that the Petitions Committee while examining the present issue may consider:

- That the limited safe harbour provisions under Section 79 of the Information Technology Act, 2000 which are necessary to maintain the function of internet intermediaries and is consistent with laws operating in other countries, is preserved. Any dilution would be harmful to the growth of Internet economy in India and also gravely impact the freedom of speech and expression of users of such platforms.
- A pre-screening of filtering mechanism is technically unfeasible and would again lead to large and pervasive censorship offending constitutional guarantees to speech and expression.
- The present laws with respect to pornography under the Information Technology Act, 2000 are robust and need the right enforcement. These laws supplement and are in line with the obscenity provisions under the Indian Penal Code, 1860. To make these laws any more stringent would inject uncertainty and may also discriminate against internet content specifically. Existing legal and regulatory framework provide for sufficient mechanisms for the Government to disable access to specific websites that violate applicable law on adult content.
- On the specific issue of child pornography greater coordination is required between different government departments and agencies. The Protection of Children from Sexual Offenses Act which has established the National Commission for Protection of Child Rights is a statutory body specifically dealing with this and may be invited within the consultation.

Union Budget

In order to foster digital entrepreneurship and to promote globally-competitive Indian companies, IAMAI in its annual Budget representation, submitted two main suggestions. These suggestions were in line with the vision of Prime Minister Narendra Modi's vision to:

- creating an enabling market condition for promotion of digital entrepreneurship
- creating an enabling tax environment for smooth operation of marketplaces

IAMAI'S Recommendations for Promotion of Digital Entrepreneurship were:

a) To promote large internet companies from India:

The software and ITeS industry which is among the most visible sectors in India today had benefitted significantly from the fiscal support provided by the Government in the form of income-tax holiday under section 10A/ 10B/ 10AA of the Income-tax Act, 1961 ('IT Act'). Currently, there is no income-tax holiday available under the IT Act for digital companies. Incentive in the form of tax holiday would help the industry achieve its full potential by facilitating expansion, employment generation and entrepreneurship, just like in the case of Telecom sector where a tax holiday was given for a period of ten years in a block of 15 years

b) To promote employment generation:

Section 80JJAA of the IT Act, inter alia, provides that an Indian company operating an industrial undertaking shall be allowed a deduction of an amount equal to 30% of additional wages paid to the new regular workmen employed by the taxpayer during a year for three years, including the year in which such employment is provided. It is recommended that a deduction of an amount equal to 150% of salary paid to new employees be allowed to companies operating in the digital industry. Further, there should be no minimum employment threshold limits that should be set as a pre-condition for claiming the said incentive. The above incentive would go a long way in employment generation and fostering entrepreneurship in digital business

c) To promote investments:

There are limited alternative sources of finance available to small and new entrepreneurs operating in the digital industry. Initial/angel investors are one of the sources for raising funds for entrepreneurs. The sector would benefit if preferential tax treatment is given to investors.

d) To promote local language on internet:

Local languages based internet/applications has the potential of improving penetration of internet and broadband in rural areas. Given the projected growth in the sector, IAMAI had recommended that the internet and mobile companies engaged in the business of development of new technology/software/ application, specifically in the field of local language internet and creation of content, be provided with an incentive of a weighted deduction of 200 percent of amount spent on research and development of application/ content. This would help provide the much needed impetus to the growth in local language technologies and applications and their integration into mainstream end-usage.

Since the e-Commerce firms today are at a cross-road due to indirect tax issues, particularly from the State Governments. IAMAI in its submission has requested the Finance Minister to address the anomaly and ensure for the smooth operation of market places. The association suggested:

e) To promote enabling tax environment for smooth operation of market places:

Issues related to VAT are simplified and the practical difficulties of the e-Commerce firms are duly consulted and considered. The current arbitrary demands on VAT and other local taxes by many States are acting as a deterrent to e-commerce.

We are happy to mention here that few of the recommendations of IAMAI, has found resonance in this year's budget. This budget will ensure that we briskly moving towards a better regime for start-ups and the budget underscore this move after the first set of provision supporting entrepreneurship.

The association welcomes the proposal to reduce taxes on Technical Services from 25% to 10% with the aim of encouraging tech start-ups. In its pre-budget recommendations, IAMAI had requested the Finance Minister to bring the tax rates of royalty/fees for technical services on par with the rates generally prevailing in most of the Treaties India has entered into with other countries.

Also, the workforce eligibility criteria reduction to avail of exemption was a welcome move. The above incentive would go a long way in employment generation and fostering entrepreneurship in digital business and is in line with the association's pre-budget submission.

The association has also welcomed the setting up of Atal Innovation Mission with an initial fund of INR 150 crore for research and development. This platform will foster a culture of innovation, research and development, and is also in line with IAMAI's pre-budget proposal submitted to the Finance Minister.

The association has also welcomed move to expand the NoFN network to be implemented by the states on a reimbursement basis. This is a great step to speed up implementation. The twin move of setting up of IIMs and IITs and the Students Financial Aid will support the increased manpower requirement for the ICT sector from a larger catchment area. This will certainly boost employment generation.

The association also welcomed the establishment of SETU (Self-Employment and Talent Utilisation). This will help in the ease of doing business in India and will be able to create jobs and hundreds of billion dollars in value.

The proposal to utilize the vast Postal network with nearly 1,54,000 points of presence spread across the villages of the country is praiseworthy. The post offices will act as payment banks in addition to acting as courier and can boost ecommerce. With RuPay debit cards for all Jan Dhan transactions, it will, along-with some other technical announcements, would boost digital payments. IAMAI has also welcomed the fact that the Finance Minister has reiterated his commitment to implement GST by next year.

Internet Governance

Internet has emerged as a key source of information and knowledge for people across the globe. It has also played a crucial role in giving voice to people who have previously remained largely unheard and, most importantly, has strengthened democratic processes by improving citizen participation and government accountability and transparency.

India now has the world's third largest Internet user group. Given the Internet's rapid proliferation, its ability to enable business innovation and contribute to political and socio-economic reforms, and its global reach, Internet governance plays an important part in creating of openness, universality, interoperability, innovation, freedom of expression, and access to knowledge. Internet's growth till date is pivoted on the fact that it has been largely self-governed, and for this to continue IAMAI submitted its Position Paper to MEA which inter alia stated:

a) A model which has least amount of intervention and maximum engagement needs to be adopted

b) To support the multi-stakeholder approach to Internet governance is vital to address complex issues of privacy, freedom of speech and expression, surveillance, transparency, which affect the civil society, industry and communities using the internet. Such decisions have to be arrived at after consulting the various stakeholders affected.

Since mass surveillance by governments has assumed centre stage in recent years and is driving the current international discourse, the association believes that the Multilateral /inter-governmental mechanisms will be inadequate to address serious concerns of government surveillance and intrusion into the privacy of Internet users and citizens. India's current position of multilateral/intergovernmental governance of the Internet cannot address these internal cyber security concerns.

Industry has been at the forefront of ensuring the growth of Internet, which serves billions of people across the globe, of which more than 300 million are in India. Any process that does not include Industry/civil society and academia in a formal discussion, where public policy decisions are concerned, is fraught with implementation challenges.

M2M Policy

With 1.25 billion population and 900-million strong mobile subscriber base, India holds huge potential for Machine-to-Machine (M2M) solutions, and with propagation of Internet of Things. The tech companies are immersing in M2M computing, which is making our smart world a lot smarter. The sector has a multi dimensional growth at present and comes across several policy and regulatory challenges.

IAMAI in April 2015 made a submission on 'The National Telecom M2M Roadmap' to the Department of Telecom. The recommendations essentially focused on entrepreneurial growth in the technology and mobile sector without the need for any onerous licensing, registration or any other regulatory imposition which would discourage innovation and benefits to end consumers.

Most M2M technologies are being developed on a global scale and their application in India to a large degree will be dependent on the international standards which are being developed. IAMAI recommended that India should actively participate in such standards development and make it the primary focus. And, rather than undertaking a formal standardization process for cyber security for all products, specific industry solutions should be developed to ensure interoperability and end to end security. A broad, flexible and adaptable framework that can respond appropriately to the changing needs of the ecosystem while still being contemporary and relevant by imbibing the lessons learnt within India and globally is essential.

It is appreciable that the government is focusing on developing cloud-ready applications and cloud-enabling government data centers. At the same time, it is troubling to see a tendency towards mandating data localization with an avowed intent to enhance security. Moreover, free flow of data across borders is the lifeline of India's USD 150 billion IT Industry that largely depends on outsourcing by foreign clients – including government agencies. Hence, rather than mandating data localization, the government should facilitate and encourage continuance of such cross-border flows even as it endeavours to incentivize data center investments.

The draft M2M Roadmap is to provide a clear and certain roadmap. However, in its objective to be comprehensive, the draft also includes areas, which clearly fall outside the considerations for M2M, and includes other areas of regulation. Such an overreach will be contrary to its objectives of providing stable growth. An illustration of the above concern areas is seen most clearly when it seeks to comment on areas, which are presently under consideration of the draft Internet of Things policy put forth by Department of Electronics and Information Technology.

Another concern that arises from a review of the document is that it focuses substantive comment on existing telecom infrastructure. This becomes problematic as the M2M policy which focuses on future models may equally include substantive comment on the application layer, where most M2M interactions occur as opposed to focussing on the infrastructure. It is suggested, given the large interface with technical applications which go beyond infrastructure, we hope that the DeiTY has been involved and its views have been sought on the Draft M2M policy.

The Draft National Telecom M2M Roadmap notes broadly in principle the definition of M2M as it is applicable over several applications in Chapter Para 1.2. The draft here makes a pertinent distinction between the different industries which are sought to be regulated by M2M standards which will be prescribed when the Draft is finalised as a policy document. Here it is pertinent to note, that though benefits may accrue from a process of such standardisation, different sectors which apply applications distinctly over their various industries may require different interests and commercial practices which may need to be considered. In the considered view of IAMAI, the roadmap needs to maintain this recognition in as much it expressly states that each such industry may require independent appraisal as to its needs avoiding a uniform approach.

It is also suggested that in bringing out an overarching roadmap, the Draft may also include the need for standards differentiation between private industry and essential government services. Industries such as the automotive and cargo industries, may not require the same level of standards development as banking and taxation. Each industry by itself may not only include large private entities which will be able to implement such standards but also smaller, individual technology driven companies which may offer tremendous utility to consumers. By prescribing a similar level of compliance within a single policy document there may be a tendency to discourage entrepreneurial growth in the technology and mobile sector. This is especially relevant with respect to pure applications providers rather than service providers who may operate telecom infrastructure by itself as opposed to merely providing applications which operate on them.

Chapter 2 of the Draft focuses on detailing various technologies and describes how they will further the M2M framework. These technologies for instance include Wi-Fi noting that such technologies have been implemented by international technical standards. It further notes in Para 2.2 that several technologies operate in de-licensed bands. It is pertinent to note that this de-licensing has permitted the growth and the ability of private industry to innovatively implement such technologies for consumers. This implementation as noted in Para 2.3 has to be within norms of quality services however for several such technologies issues of quality of service and interoperability are determined by international technical standard and specifications. This approach which has led to growth and adopting may be continued and expressly noted as the preferred route for developing M2M over de-licensed bands.

Specific comment has also been made to the suggestions which are contained in Para 2.6 under Point 7 that provides for security related considerations. It states that voice and SMS services should to the extent possible be permitted only on M2M sims. This may lead to the ability to innovate and roll out services which operate on a pure application layer of the internet which does not require a M2M sim. For instance, a form of VOIP services which permit voice traffic operating without a M2M SIM may be permitted if it enables similar security measure which makes such traffic as suggested in the Draft to be only routed through a M2M sim. It is suggested that the Draft should include the liberty for offering voice and SMS services without SIM.

Comments on Global Scenario on M2M Standards and Regulations:

IAMAI commented on the approach of the draft M2M roadmap where it sought to analyse and present international and country specific, standards and regulations with respect to M2M services. In this respect it submitted that the dual approach of international standards and developing country specific regulations may focus on the former. Most M2M technologies are being developed on a global scale and their application in India to a large degree will be dependent on the international standards, which are being developed. Here it is suggested that India should actively participate in development of such standards.

Also with respect to the country specific regulations of M2M technologies it is pointed out that the approach adopted by Brazil demonstrates three clear points: First, any regulation on M2M has been with a clearly articulated objective. Second, it has concentrated on registrations as opposed to licensing. This by itself indicates that the regulations are not posed towards imposing onerous conditions on M2M providers. Finally, the approach is driven by sectoral regulators where for instance the Brazilian Electricity Regulatory Agency (ANEEL) has approved regulations for basic requirements for smart meters. Such an approach will bring a higher level of expertise, where the individual interests of each industry sector which implements M2M can be regulated with the necessary nuance.

It is also pertinent to mention here that standards for several products may not traditionally include any reference to cyber security per se. For example, standards for a thermostat may include electromagnetic parameters, accuracy in terms of temperature, safety in terms of electrical shocks and energy rating; but if it goes into a connected smart device, it also needs to have built-in cyber security. However, rather than undertaking a formal standardization process for cyber security of thermostats, one could look at industry solutions and in most cases, those should suffice.

While standards are useful in certain situations, they alone are insufficient to ensure interoperability and more importantly, end-to-end security. Hence, it is desirable to have a broad, flexible and adaptable framework that can respond appropriately to the changing needs of the ecosystem while still being contemporary and relevant by imbibing the lessons learnt within India and globally.

WTO Classification of New Services

For India, the opportunity presented by an open ICT economy as opposed to a closed or restricted ICT economy is potentially massive. An open ICT economy would provide a fillip to job creation, hugely expand entrepreneurial opportunities as also further strengthen and solidify India's standing as an off-shoring destination. To craft the new services classification, clear definition would need to be developed to avoid any uncertainty regarding the scope of the commitment being undertaken by a member country / India. Classification confusion can have significant implications for a member country as it can determine the nature and scope of the commitment, which is undertaken by it. The Antigua/ US Gambling Dispute [WT/DS285/R] is a prime example of such confusion. In this case it was asserted that the US had undertaking commitments on gambling services whereas the US claimed that it had not undertaken such commitments for gambling services since it had excluded "sporting services" which according to the US covered gambling. The Disputes Panel found that the US has indeed undertaken commitments on gambling since its commitments were based on the W120 and the W120 referenced with the CPC incorporated gambling as part of other "recreational services" (except sporting). Consequently, in terms of implications, definitions of each new service should be undertaken carefully and with a great degree of clarity to avoid any commitment based overlap as well as to ensure that the classification is as robust as possible.

The definitional criteria of new services are incredibly complicated and subject to much dissent and discussion. Most of the discussion appears to have proceeded on the basis of "slotting" new services under the existing classification. In this sense, while many countries develop national definitions, it has been recommended that such definitions at least link to the existing classification, and ensure no barrier in digital trade based on ownership be it foreign or domestic.

IAMAI in response on "WTO classification of New Services" made its submission to DoT in April 2015. The submission stated that from a developing country perspective, a "cluster approach" needs to followed rather than the "defensive approach" when dealing with re-classification of the W120 or UN CPC. Many developed nations as well as 'exporters of services" have preferred the "cluster approach" to classification which would normally not distinguish between "core" and "non-core" services and would place them in a broader category of integrated chain of services. The Government of India however may be inclined to follow, in part or whole, the disaggregated approach in classification since the Government of India, we assume, would like to reserve various commitments relating to Telecommunication Services or for the so called "new services" particularly in view of fast paced developments in relation to such services.

Adjusted Gross Revenue/Gross Revenue and Treatment of APP Partnerships with Telco's

IAMAI in the submission to TRAI emphasised on the need to have a clearer and more appropriate framework for Adjusted Gross Revenue (AGR)/ Gross Revenue (GR). AGR / GR should be imposed for Telco's only on pure licensed telecom services. IAMAI supports this position of various stakeholders, which would help advance the overall financial growth of the Indian telecom industry, facilitate the expansion of infrastructure and innovative services, and reduce costs to consumers.

Building on the above, IAMAI also stated that the telecom and mobile application sectors have seen rapid growth in India, particularly with the growth of digital services and apps. App development represents a rapidly expanding element of India's telecom and Internet success story - not only helping with economic growth and employment, but also with providing powerful tools and services to Indian consumers. One rapid way of promoting the adoption of such services and the financial growth of the app sector as a whole is by making payments easier. Across the world - as well as in India - this often involves innovative partnerships where app developers, app stores, or other mobile commerce firms partner with telcos, allowing the later to use their existing infrastructure and relationships to consumers to collect payments towards easily purchasing apps and services. These innovative partnerships are at the heart of the current growth and future success of mobile commerce.

Currently, the growth of mobile commerce in the telecom sector in India is being impeded due to the aggressive interpretation that can be taken regarding new and innovative business practices involving partnerships by third parties and app developers with telecom service providers. Specifically, there is a need to clarify that any partnerships which app developers or application stores may have with telecom operators - such as carrier billing - should not be included in GR/AGR computation. Such activities do not fall under the definition of "value added service" under the current definitions outlined by TRAI, and should therefore not be included in revenue sharing computation.

For the overall benefit of the Indian telecom sector, consumers, and application developers, IAMAI strongly recommend that any recommendations for TRAI in this area clarify that any money collected or income derived from such innovative business practices and partnerships should not included in the revenue base calculation, especially given that existing tax and other financial law frameworks are adequate.

Media Law

The Law Commission, while considering issues related to electoral reforms, increasingly felt the need to address media-related issues connected to elections such as the phenomenon of paid news and opinion polls.

However issues relating to the media are not solely limited to elections. The Consultation Paper by the Law Commission of India raised several points regarding the Internet and social media as part of its inquiry into the state of media law in the country, and made proposals towards possible reforms that are crucial to the role that they will play in ensuring in the growth of the medium and its benefits for Indian citizens.

IAMAI its submission had stated that any legal framework proposed should recognize the importance of the Internet in furthering free expression. Concomitantly, such a framework should be within the constitutional boundaries of imposing restrictions which are reasonable and as per due process. IAMAI had sent the recommendations and inputs towards this as well as specific suggestions regarding the legal framework affecting the Internet in India.

Cyber Regulation Advisory Committee (CRAC)

The IT Act envisages a committee consisting of "official and non-official members representing the interests principally affected or having special knowledge of the subject-matter as the Central Government may deem fit". It is meant to advise the government on rules and other purposes under the IT Act. The committee's findings and the manner in which they are framed pose a serious threat to human rights. It is unwise to leave decisions implicating freedom of expression to a committee devoid of members who might press for safeguards against state-led interference in human rights.

- Discussion relating to availability of Pornography on Internet
- Discussion on misuse of Social Media and other means of communication

There was no discussion on Localisation of Servers and on Section 79 of the IT Act. The discussion was primarily around containment of pornographic content on the Internet. This was in response to Hon'ble Supreme Court of India's directions asking Department to file a reply with the details of the measures to contain the Pornographic content on the Internet.

Minister of Communications, Electronics and Information Technology Shri Ravi Shankar Prasad expressed his concern about the wide availability of the pornographic content on the Internet. To address this, the Department and the Associations suggested the following:

- Crowd source the list of Pornographic sites
- Once there is a comprehensive list it should be vetted out by a group comprising of people from various walks of the society.
- Post validation of the pornographic content CERT-In would be intimated to block those cites

In addition, a repository should be build specific to child pornography, where the information collected should be shared with other countries for blocking of those sites.

Meeting with RBI Governor

The Payments council of India (PCI), which works under the aegis of IAMAI, arranged a meeting with Dr. Raghuram Rajan, Governor, Reserve Bank of India. At the meeting, critical issues faced by the non-bank payment service providers and how the current endeavours of PCI are aligned to achieve its vision of encouraging the growth of non-banking payment system providers were discussed with Governor along with Shri G Padmanabhan, Executive Director, Reserve Bank of India.

The focus areas of discussion were relaxations in Payments Banks' licensing norms and BBPS guidelines, Integration of Prepaid Payment Issuers with Bharat Bill Payment Systems, granting recognition to the non-bank players for a role in financial inclusion, bringing parity in using electronic and physical cash, Use of technology to mitigate the fundamental risks liquidity and settlement for non-bank players and automated dashboard for STR's at the centralized level.

CHAPTER 2

BUSINESS DEVELOPMENT

Sectoral business development has been another important area of work at IAMAI since inception. Through innovative events, exhibitions and institutional arrangements, IAMAI strives to promote larger segments of businesses within the digital industry. The highlight of this year's business development related activities have been the kicking off of the business process streamlining initiative with the Advertising Agencies Association of India, an initiative that has been moribund for the last couple of years; the India Pavilion at the Mobile World Congress at Barcelona for members who are interested in expanding overseas and a CEOs' Learning Trip to China. These and many other activities are narrated in detail in this chapter.

IAMAI–AAAI

As agreed last year, the credit recovery process between IAMAI and AAAI was implemented since the month of May 2014. The objective of the Joint Working Committee is to grow the digital advertising market manifold and identify key areas of work keeping in view the mutual interests of the publishers and the agencies. Some of the issues taken up at the meetings over the year were standardization of ad measurement, streamlining of invoice process and timely payment by AAAI agencies members.

To streamline the billing process between publisher members of IAMAI and AAAI member agencies, which included standardization of the billing, credit and payment cycle, and the course of action against the defaulting clients, a subcommittee was formed. It took few months for the process to get finalised resulting in more and more publishers sharing the data on overdue payments and the agencies responding positively to the same. The data sharing of the overdue receivables between the publishers and the agencies has started on a consistent basis from January 2015. The data shared for the month of January 2015 and February 15 was approximately Rs. 74 cr. of which Rs. 40 cr. was outstanding for more than 90 days.

Rathan Kelkar and Sanjiv Mital

INDUSTRY CONFERENCES

The association has set a benchmark in organising pioneering industry conferences for several years now. The year 2014-15 too was no exception and we organized large conferences covering various aspects of the digital industry – digital marketing, e-commerce, financial inclusion and digital payments, online travel etc. The highlight of the year as usual was the 9th the India Digital Summit along with the India Digital Awards. The India Digital Summit proved to be a big success with more than 1100 delegates attending the event over two days. This year saw more speakers from the corridors of power, including the Minister of Communications, Shri Ravi Shankar Prasad, Minister of State for Skills Development and Entrepreneurship, Shri Rajiv Pratap Rudy, besides host of prominent industry leaders.

The 9th India Digital Summit

The theme of this year's Summit held on 14-15 January in New Delhi was "Digital India". The idea behind this year's theme was to make a conscious effort towards understanding the current status of India as a nation in terms of digital connectivity, communications and technology, and to lay down the roadmap towards making our nation a truly digital society in the sectors of commerce, education, healthcare, travel, research and development. Organized annually since the year 2006, the India Digital Summit once again proved to be the largest annual gathering of the Digital Industry in India with over 1100 delegates attending and more than 110 Speakers addressing the summit over the two days. The Summit this year saw five different stages: Centre Stage, Mobile Stage, e-Commerce Stage, Digital Marketing Stage and Entrepreneurs' Stage.

Speaking at the inaugural session, Union Minister of Communication and Information Technology Shri Ravi Shankar Prasad stressed on how the country's growth is interlinked to the 'Digital India' programme. “The government is dedicated to creating a digital ecosystem that will enable internet to touch the lives of all Indians,” the Minister said. He further pointed out how it was imperative to create hubs in rural India that will help the growth of e-commerce, which remains unexplored so far. “Unless connectivity reaches every village of India, the dynamics of growth will remain unchanged,” he said.

Speaking on access, the Minister said, “it took 30 years to cover 10 lakh kilometres of optic fibre laying, and in just next three years, seven lakh kilometres will be added, making rural connectivity a reality.” Releasing the IAMAI and The Boston Consulting Group (BCG) report India@Digital.Bharat, Shri Prasad said, “For the internet economy to touch US$200 billion by 2020 that will contribute five per cent of GDP, we need to move at a fast pace towards computer literacy.

Rajan Anandan, Chairman, IAMAI & Managing Director, Google India, in his inaugural address, stressed on the growth of internet in India and successful roll-out of the government’s Digital India programme. “India is the third country in the world to have over five Internet companies valued at over US$1 billion. India is the fastest growing Internet country but we need to move from narrow band to broadband at the earliest,” he said.


Brian Parrot

The next session was on Mobilizing Canadian Innovation Advantage. Brian Parrott, Minister (Commercial), government of Canada was the keynote speaker. He mentioned that Canada is growing at a very fast pace in the digital space. He further mentioned that many Indian companies are already collaborating with Canadian companies and both countries can become natural partners for technology and innovation. He highlighted that Canada is already leading in cloud computing and possesses large big data centers at low costs.


Rajesh Jain

The next keynote address was by Rajesh Jain, Chief People Officer, netCORE Solutions on ‘Making India Rich’. Rajesh Jain is a serial digital media and technology entrepreneur, with a passion to transform India's political and policy future. He elaborated the following three key points while addressing the gathering:

- Making India Rich is the greatest entrepreneurial challenge and opportunity of our lifetime
- Changing people’s minds is the foundation of changing policies and outcomes
- Technology can help political entrepreneurs compress time for change from 10,000 days (a generation) to 1,000 days.

The next leadership talk was by Thennavan Subbiah, SI Global Head, Adobe. He spoke on the framework of performance marketing. The key highlights of his address were:

- Mobile as a platform has provided immense data and information about the consumer because it is so personal, so intimate.
- Consumer needs information very quickly in this era and this is what marketers need to keep in mind.
- Data collected through the websites, apps, social media and offline methods is not consolidated because all these channels are working in silos. The challenge before marketers is to smartly converge the data collected from different platforms and make sense out of it.
- The different tools viz. analytics, social research and market automation should be integrated for relevant data.
- Customer data is not as important as the Customer context. Making relevance of the communication to the customer is the key thing.
- The response of the user depends upon what is the content and context of the message being sent out to him
- Empowering the business users with intelligent tools is very crucial for advancement and returns.


Thennavan Subbiah

The French startup BlaBlaCar, which has become the world's largest long-distance ride-sharing community on the back of deteriorating public transport systems across the world, was launched in India at the Summit. The launch session was introduced by Aashish Dua, Product Marketing, Facebook while Nicolas Brusson, COO, BlaBlaCar and Raghav Gupta, India Country Manager, BlaBlaCar were present to address the gathering on their product and strategies.


Nicolas Brusson

Vineet Taneja, Chief Executive Officer, Micromax delivered a keynote on 'Connect The Next Billion Through Intelligent And Innovative Devices'. Taneja highlighted the following points in his address:

- India is a mobile internet - first economy
- Huge ecosystem opportunity still awaits us
- Each month, 8-10 Million of Indians connect to internet for the first time, mostly on mobile
- There is a massive wave of Feature phone to Smartphone users
- Proliferation of Smartphones is pervasive across India
- Strong consumer focus and vernacular delivery to bridge the gap
- Innovative but scalable business models, customer analytics and new connected devices: the collaboration and integration of these are required to deliver.


Vineet Taneja

The session on Smart Governance was moderated by Nimisha Jain, Partner and Director, Boston Consulting Group. Sanjiv Mital, Chief Executive Officer, National Institute for Smart Governance and Rathan Kelkar, Chief Executive Officer, Centre for e-Governance, Government of Karnataka addressed the session.

"Karnataka is at the forefront to ensure that National Optical Fibre Network reaches each and every Gram Panchayat in the state", asserted Mr. Rathan in his presentation. He said the Centre for e-Governance (CeG) has been mandated to e-enable the government. As a part of that mandate, we maintain core infrastructure of the state like State Data Center, WAN, Secretariat LAN, touch points like 'Bangalore One' and 'Karnataka One' for the citizens and run common applications for the government like HRMS (payroll and service register maintenance). HRMS is widely accepted by employees working in the government where salaries and service matters are dealt with. Then, we have an e-procurement portal where any procurement above Rs 5 lakh is covered.

The final Leadership Talk of the day was delivered on the topic - Building Digital Skills and Developing Skills with Digital Means by Shri Rajiv Pratap Rudy, Union Minister of State for Skill Development and Entrepreneurship (Independent Charge) & Parliamentary Affairs, Government of India.

Asserting on the need for skills development, Shri Rudy mentioned, "if you look at a country like the UK, the percentage of skilled people in the workforce was 70%, in Germany the total skilled workforce today is 74%. In Japan, it is around 80% and in Korea, it is 92%. But the total percentage of workforce in India is just 2% cording to NSSO." While the scenario was by no means acceptable, the Minister called upon the corporate sector and PSUs to contribute in the skilling initiatives of the Ministry of Skill Development and Entrepreneurship (MSDE). According to him, India has focused in the domain of education for many years and needs to now place its attention to skilling people and creating jobs such that the large demographic dividend is employed. He indicated that such an initiative requires scale that could be achieved through public-private partnerships.

The second day of the Summit commenced on a powerful note as Kirthiga Reddy, Vice-Chairperson, IAMAI & Managing Director, Facebook India and D Shivakumar, Chairman and CEO, PepsiCo India discussed the evolving nature of the Digital medium and how brands were looking at Digital for leveraging its reach and impact. Shivakumar said that it was imperative for brands to be digital savvy in order to increase their consumer base. "Digital takes away constraints, digital kills the middlemen, digital gives immense access to information," said

Shivakumar pressing on the importance of digital as a marketing ingredient. He stated that brands and advertisers must realize that the voice of the consumer is more important than the branding message which is conveyed to the audience.

D Shivakumar

In the following session, Chandrasekar Radhakrishnan, Head of Communications, South Asia Region, Nestlè India spoke on 'Marketing and branding in a digitally connected world'.

Chandrasekar Radhakrishnan

The next Plenary session was a panel discussion on 'Blueprint of Performance Marketing: Business Strategies and Technologies to Build and Measure Success' and was moderated by Thennavan Subbiah, SI Global Head, Adobe. The panellists in this session were Nitish Tipnis, Director Marketing & Sales, Hover Automotive, Rishi Piparaiya, Director Marketing & Direct Sales, Aviva India, Archan Banerjee, Head-Digital Marketing, Dabur India and Gyan Gupta, Chief Operating Officer, Dainik Bhaskar.

Thereafter, a Leadership Talk on the topic "Building Digital Bharat": Access to Rural India was delivered by Smt. Aruna Sundararajan, Chairperson & Managing Director, Bharat Broadband Network Ltd. and Additional Secretary & Administrator (USOF), Government of India. In the panel discussion that followed her address, Satyen Gajwani, Chief Executive Officer, Times Internet, Nishant Rao, Country Manager, LinkedIn India and Vijay Shekhar Sharma, Founder, One97 Communications besides Smt. Aruna Sundararajan participated. The session was chaired by Rajan Anandan, Chairman IAMAI & Managing Director, Google India.

Vijay Sekhar Sharma, Rajan Anandan, Nishant Rao, Aruna Sundararajan and Satyen Gajwani.

"To accelerate NOFN, the Prime Minister's Office (PMO) has instituted a high level committee to have a comprehensive look and suggest changes in the project. The committee will look into restructuring aspects of NOFN and will focus on network architecture, network design, business strategy, technology, business model and missing framework," said Aruna Sundararajan during her address.

The next panel discussion was on 'Metric that Matters: Finding the Crux of the Social Media Analytics!' This session served the purpose by eventually highlighting as to how to find the core of social media analytics so as to achieve the desired set of results.

Social media which is the base for individuals, professional, marketers, entrepreneurs can be best for the analysts as well. Social media which is conducted through various platforms has been leveraged as a crucial medium to focus on the customer requirement at the right time and at the right place, to reduce the response time gap. But to manage such huge bulk data, analytics are required which further should be based on certain specific metrics.

The panel discussion was moderated by Snehi Jha Mehta, Head –Client Solutions at Facebook, India. Panellists included Anupam Dixit, Industry Manager India, Twitter, Deepa Sayal, Director & Co-Founder, ADG Online, Deepali Naair, Chief Marketing Officer, Mahindra Holidays & Resort India, Aroon Kumar, Head Marketing and Social Media, Valuefirst, Mark Henning, Head of Media & Digital, AMAP Millward Brown.

The next discussion was on Net Neutrality: An Indian Debate. This session was addressed and chaired by Shivam Vij, Founder, Kafila. The panellists were Mahesh Uppal, Director, Com First India, Rajan S. Mathews, Director-General, COAI and Vijay Anand, Founder & CEO, The Startup Centre.

e-Commerce Stage

The first Panel discussion that took place on this stage was on the topic - Challenges of Non E's of e-Commerce. The Session Moderator was Manish Vij, Entrepreneur and Investor, Digital Media and Consumer Internet. The Panellists were: Neeru Sharma, Co-Founder, Infibeam, Vivek Gaur, Chief Executive Officer, Yepme Shopping, Alokedeep Singh, Head eCommerce, Titan and Abhinay Choudhari, Co-founder, Bigbasket.com. In this session, the panellists discussed the challenges faced by the e-Commerce companies in areas of supply chain, distribution network, customer friendly and secure payment systems, merchandising and seamless tax systems. They also discussed about the possible solutions to the current challenges existing on the operational side of e-Commerce.

The next session was on Travel e-Commerce Fuelled: The Next Growth Strategy. The moderator for this session was Dhruv Shringi, Co-founder & CEO, Yatra while the Panellists were: Aloke Bajpai, CEO & Co-Founder, ixigo.com, Nikhil Ganju, Country Head, Tripadvisor, Himanshu Singh, Chief Executive Officer, Hotel Commerce, Gaurav Chiripal, Chief Executive Officer, Quadlabs Technologies, Hari Nair, Founder and CEO, HolidayIQ and Prasanjeet Dutta Baruah, Head – Marketing, The Oberoi Group of Hotels. As the topic itself suggests, the panellists discussed their strategies with respect to the growth of their digital travel booking and reviewing businesses.

Subsequently, there was a session on Fundamentals of an Effective Digital Strategy. Speakers shared their views on how to work on the challenges of seamless digital experience with totally synced business and technology. The entire focus was laid on which fundamentals or basic concepts to rely upon so as to witness the effectiveness in the digital strategy to be framed. The session moderator, Raj Singh, Managing Director, Techmobia briefed about the broader areas on which the session was supposed to be led on. He substantiated that areas like marketing, sales, Client Relationship Management (CRM) should be taken up and a complete integration of the entire strategy is the fundamental key to success. Panellists included: Subhash Kelkar, CIO, Mahindra Holidays & Resorts, Ranajoy Punja, Vice-President & Head, Market Development, Global Data Center Business, Tata Communications, Vibhore Sharma, Chief Technology Officer, InfoEdge India, Prashant Pillai, Director- Business Development & Strategic Marketing, Thomson Reuters, Arokia Nathan, Head, Technology, Dainik Bhaskar Digital, Rakshit Kapoor, Country Head, Buongiorno.

Later in the day, IAMAI and NetNames launched two white papers with the view that the current restructuring of the Domain Name System

(DNS), and the introduction of thousands of new domain name endings, is the biggest change to the Internet since its inception. The launch was also supported by UK Trade & Investment (UKTI). The white papers were launched by Dr. Ajay Kumar, Joint Secretary, Ministry of Communications & Information Technology, GOI. Present at the launch were St. John Gould, Director, UK Trade, Investment & Prosperity, British High Commission India, Dr. Govind, CEO, NIXI, David Franklin, Global Director of Brand Protection Sales and Stuart Fuller, Director of Commercial Operations at NetNames.

Digital Advertising Stage

To further substantiate the concept of mobile marketing and throw light upon the upcoming opportunities and issues faced in the mobile advertising ecosystem, the industry experts and influential speakers from major companies discussed the same in the panel discussion held on the topic Mobile Advertising's Future: A Turbulent Drive. The session moderator Mr. Anurag Singh, Co-Founder & ED-India (Ads Platform), Affle initiated the discussion by highlighting the fact that there lies ahead a huge growth in terms of users and revenues. Panellists included Nilay Arora, Country Head – WeChat India & Games365.in, Kunal Shah, Founder, Freecharge, Parul Bhargava, CEO, vCommission, Kunal Soni, Head of Performance Advertising Business, South East Asia & India at Google and Tushar Vyas, Managing Partner, GroupM.

The Increasing Role of Technology In Modern Marketing – Ssp,Dsp, Rtb-Going Beyond Three Letter Words To Leverage Technology, To Solve Fundamental Marketing Challenges – was the topic of discussion of the next Session. The session moderator was Noor Warsia, Group Editor, APAC, Digital Markets Asia and the Panellists were Rohit Kumar, Managing Director, Asia Pacific, Sociomantic Labs, Swapnil Shrivastav, VP Ad Tech, Times Internet, Anirudh Kumar, Associate Vice President – Online Marketing, Snapdeal, Benedict Hayes, Vice President, Strategy, iProspect Communicate2 and Prabhvir Sahmey, Head, Google Media Technology.

Mobile Stage

The first panel discussion on this stage was on Mobile Wallet Adoption: How It Could Transform the Retail Scenario in India. Several industry leaders, speakers and eminent influencers discussed the current plight of mode of payments in India and how to evolve the same. The Session Moderator was Srikanth Rajagopalan, Head of Strategy & Products-India, Amazon Payments and the Panellists were Suresh Sethi, Business Head/CEO M-Pesa, Vodafone, Shashank Joshi, Managing Director, My Mobile Payments, Bipin Preet Singh, Founder & CEO, MobiKwik, Anshul Kheterpal, Chief Financial Officer, Airtel Money and Udit Sharma, Vice President, Oxigen Wallet, Oxigen Services India.

Thereafter, the stage witnessed a special address from Ranajoy Punja, Vice-President & Head, Market Development, Global Data Center Business, Tata Communications on Digital Transformation: The Case For Enterprise Cloud.

The next session was a Panel Discussion on SMAC (Social, Mobile, Analytics, and Cloud): A Disruptive intersection! The Session Moderator was Samiron Ghoshal, Partner, Advisory Services, National & Global Talent Hub Leader, IT Advisory, EY LLP and the Panellists were Ambrish Bajaj, Head of Mobile, Jabong.com, Atul Shah, Head, Cloud Strategy and Business Dev, Tech Mahindra &

Founder, Consumyze Software and Ashutosh Gupta, Director Marketing Solutions, LinkedIn. The session saw a discussion on how the integration of the top trending technologies viz. Social, Mobile, Analytics, and Cloud is providing competitive edge and an immense disruptive for marketers as well as technology enablers.

Next, a discussion on Idea, Innovation & Implementation: What It Takes To Build a Successful Mobile App business in India took place. There are more 30 million app download every day. This is a clear indication of huge opportunity in mobile app business. Since apps are dramatically

changing every day, India is coming up as a strong country investing in this sector. Tarun Malik, Director and Head, Media Solutions Center & Cloud Services, South West Asia, Samsung, moderated the session. Other panellists included Navdeep Manaktala, Head Applications & Developer Ecosystem, Microsoft Mobile Devices & Services, Rahul Razdan, Chief Executive Officer, Mango Games, Virat Khutal, Founder and CEO, Twist Mobile, Raghav Gupta, India Country Manager, BlaBlaCar and Rohith Bhat, Chief Executive Officer, Robosoft.

This was followed by a panel discussion on Internet of Things: Emerging Business Models. This is nothing but Internet of Things (IoT), which if leveraged upon in the right direction can bring about the desired results and create wonders. The session moderator Lloyd Mathias, Marketing Head India, PPS, Hewlett-Packard brought up interesting concepts on how the interconnection of the embedded devices inclusive of smart objects will usher in the new era and help to automate almost everything. Other panellists were Tarun Malik, Director & Head, Media Solutions Center & Cloud Services, South West Asia, Samsung, C. Rama Krishna Reddy, Chief Executive Officer, Spoors Technology Solutions, Awita Badonia, IT (CSM) Director India, Alcatel-Lucent, Jagdish Mitra, Head Mobility Business & Large Deals, Tech Mahindra, Sandeep Sibal, Country Manager and VP Business Development, Qualcomm India & South Asia.

Entrepreneurs' Stage

The session on Change in the Concept of Valuation in the New Digital Age brought to light a lot of insights to the participants who witnessed it and came up as a complete refreshing experience for them. The session was moderated by Vijay Shekhar Sharma, Founder, One97 Communications Ltd. Panellists included Aashish Bhinde, Executive Director, Digital Media & Technology, Avendus Capital, Anshoo Sharma, VP, Lightspeed Venture Partners, Harish Bahl, Founder and Chairman, Smile Group, Sarbvir Singh, Managing Director, Capital18.

The next plenary session was on the Regulation and Freedom of Enterprise. This was moderated by Shashwat DC, Editor, Moneycontrol while the panellists were Vishwas Patel, Founder CEO, Avenues India, Yashish Dahiya, CEO & Co-Founder, PolicyBazaar.com and Aprameya Radhakrishna, Founder and Director, TaxiForSure. The session primarily discussion how certain regulation could adapted and modified to promote digital entrepreneurship in India thereby bolstering the economy and following the concept of 'Make in India'. The session highlighted that it is essential upgrade the parochial policies that are hindering the entrepreneurial efforts of innumerable citizens and enterprises of the country.

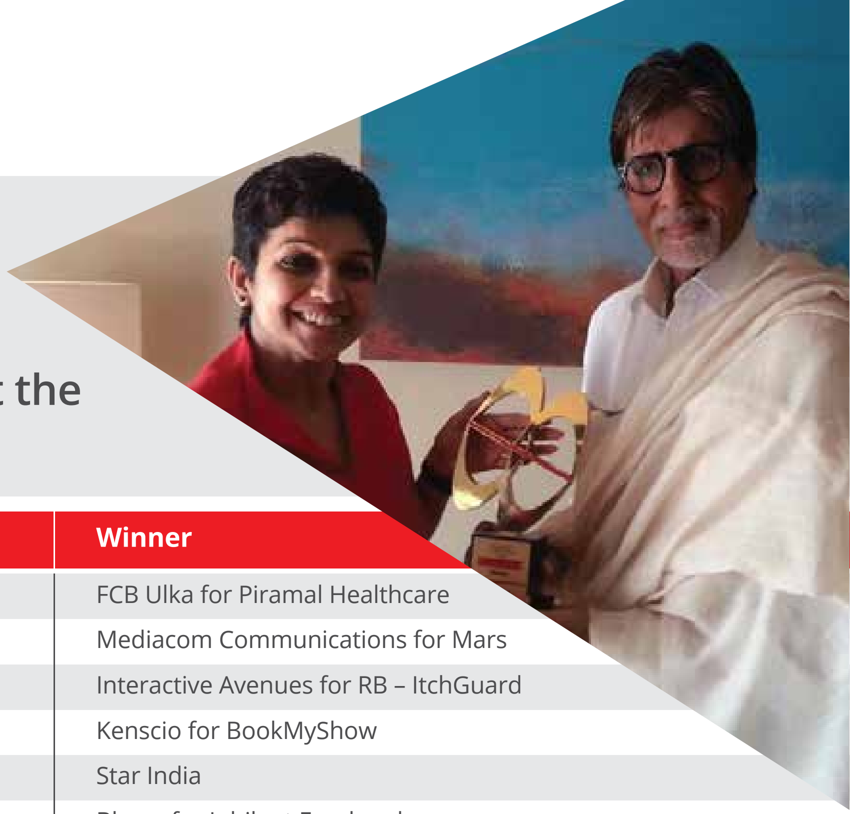
Thereafter, it was time for some of India's most renowned and successful entrepreneurs in the Digital domain to share their great journeys from scratch. The entrepreneurs who shared their experiences with the audience were:

- Suveer Bajaj, Co-founder, Foxymoron
- Dippak Khurana, Co-founder & CEO, Vserv
- Vishal Gondal, Founder and CEO, GOQii
- Sampad Swain, Co-founder and CEO, Instamojo
- Jay Jain, Co-founder, m-Ad Call
- Pushpinder Singh, Founder, Travelkhana
- Siddharth Gupta, Co-founder, Invite Referrals
- Pranshu Bhandari, Co-founder, Culturealley
- Paavan Nanda, Co-Founder, Zostel

5th India Digital Awards

The India Digital Awards is organised to acknowledge and appreciate the efforts of organizations, professionals and personalities who have set new benchmarks in connecting the brand and the consumer on the digital front. The India Digital Awards' was organised as part of the 9th India Digital Summit to append to its scope and charm. The awards this year had 6 Categories and 31 sub-categories. The categories were Digital Advertising, Website, Mobile, Payments, Digital Social & Economic Empowerment and Special Awards. The winners of the awards were selected by members of the Jury from the best work entered through the call for entries. The jury members independently inspected each entry and rated them based on their respective judging criteria. Each entry was evaluated by more than 1 jury member. Entries rated best through this process were selected as nominee for the respective category and were further evaluated by the team to select the winners. The digital eco-system has increased vastly, and the consumption has been equally enormous. Consequently, there were 693 entries sent for the awards and the Jury met over and judged the entries on the following criteria: Creativity & Innovation, Execution, Results, Overall Experience and Strategy.

Legendary Bollywood actor Amitabh Bachchan was adjudged the Social Media Person of the Year at the 5th India Digital Awards.



Award	Winner
Display Campaign	FCB Ulka for Piramal Healthcare
Search Marketing Campaign	Mediacom Communications for Mars
Viral Marketing Campaign	Interactive Avenues for RB – ItchGuard
Email Marketing Campaign	Kenscio for BookMyShow
Social Media Marketing Campaign	Star India
Digital Integrated Campaign	Blazar for Jubilant Foodworks
Execution of Performance Campaign	Communicate 2 for Cleartrip
e-Commerce Website for a Retail Brand	Tata Docomo eShop
e-Commerce Website in a Specialised Category	www.freecharge.in
Local Language Website	Navbharattimes.com
News Content Website	NDTV.com
Travel Website	HolidayIQ.com
Financial Website	Policybazaar.com
Educational Website	NIIT.com
Brand / Product Website	Micromax Canvas - for Website
Advertising or Marketing	H.O.P.E - How Our Prime Minister got Elected by Madison Communications
Consumer Mobile Service	Freecharge
Mobile Enterprise Product or Services	Sabsebolo: Audio Conference for Enterprise
Mobile Game	Keymon O`Fish by Viacom18
Innovative Mobile App	CultureAlley`s English App
Mobile Money Product or Service	MobiKwik Wallet
Prepaid Product	DCB JANAJEEVAN Prepaid Card
Digital Payment Facilitator	Avenues India
Digital Wallet	Paytm Wallet
Money Transfer Programme	Oxigen Services India
Best use of Mobile for Social and Economic Development	Sounds of Silence Foundation
Best use of Internet for Social and Economic Development	Reliance General Insurance
Start-Up of the Year	m-AdCall
Digital Person of the Year	Deepinder Goyal
Digital Agency of the Year	Interactive Avenues
Social Media Person of the Year	Amitabh Bachchan

6th National Conference on Digital Commerce

IAMAI organized the 6th National Conference on Digital Commerce on 29 May, 2014 at New Delhi. Organised since the year 2009, the conference had been devised to map and analyse the shift from streets to the desktops and portable devices. Topics related to how the huge business opportunity has emerged since the booming of the e-commerce sector and how this business could become more measurable, customisable and engaging in terms of ROI, customers and promotions respectively. The speakers also discussed other business aspects such as Marketing, Logistics, payments, delivery mechanism and provision for feedback. The expert panellists also assessed the existing trends in the e-commerce industry and based on that formulated a roadmap for growth of the businesses and the sector as a whole.

Plenary Session 1

Leveraging Mobile for Commerce:
The session was moderated by Ravi Sundarajan, Chief Operating Officer, Webaroo. The panellists included BipinPreet Singh, Founder & Chief Executive Officer, MobiKwik, Pranav Bhasin, Vice-President Mobile, MakeMyTrip, Gautam Pande, Vice-President Marketing, Tradus.com, Mausam Bhatt, Director Mobile Marketing, Flipkart, and Amber Krishan, User Experience

Strategist, Human Factor International. The panellists discussed how mobile is helping companies render personalized contextualized and location specific services, how it is helping engage customers on the go and how it could be the next marketplace with its increasing usage among consumers. This session essentially discussed how there is a tremendous adoption of mobile in the country, in terms of proliferation of Apps and continuous adoption of Commerce i.e. Transaction on mobiles. The panellists discussed PET Methodology, i.e. Persuasion, Emotions and Trust. The key point highlighted in this session was how mobile is playing a very important role in customer acquisition and customer engagement.

Ravi Sundarajan, Chief Operating Officer, Webaroo, delivered a special address on:
'Will India be more like China and Japan in leveraging Mobile for Commerce'. Sundarajan spoke about how the growth rate of online shopping in China differs from International markets. The compound annual growth rate of online shopping in China in 2003-2011 exceeded 100% ahead of the rate of growth in all other countries between 2011 and 2013. It still had the highest growth of 66%. Mr Sundarajan spoke about many of the factors that differ between India and China. In China most used mobile payments solutions are SMS payments, Mobile apps and Mobile web payments.

The second Special Address on Towards Profitability:
Optimizing eCommerce operations with Mobile was delivered by Beerud Sheth, Chief Executive Officer, Webaroo. He stated that in the e-commerce sector in India sector-wise share is very

disproportionate as compared to China. The only ultimate objective in this business is customer satisfaction. Customer satisfaction drives maximum profitability. Hence, companies are trying hard to optimise their companies and products to provide better user experience.

Plenary Session 2

eCommerce Mechanism: Bridging the gap between expectation and experience: The panellists included: Raj Singh, Managing Director, TechMobia (Moderator), Kumar Karpe, Chief Executive Officer, TechProcess Payment Services Ltd, Asit Oberoi, Senior President & COO, Yes Bank, Neeru Sharma, Co-Founder & Director, Infibeam.com, Shashank Joshi, Managing Director, My Mobile Payments, Manish Saini, Vice President Online Business, Ferns 'N' Petals, Kundan Kumar, General Manager Marketing, Yepme.com. The panellists spoke about the problems being faced by the e-commerce industries to match the standards of traditional shopping. The challenges being faced are that the touch and feel is not there and that the products cannot be delivered instantly amongst a few others. So it is important to engage with customers by giving them good offers and making them comfortable.

To bridge the gap between expectations and experience, the customers must get what they see. Gaining the trust of the customers is very important with respect to delivery and payments issues. The main topic addressed was on how can immediate feedback, rating & reviews mechanism online can promote e-buying amongst the traditional consumers. With immediate feedback, the companies are also able to understand where they are going wrong and what faults are being made. The first thing that the customers look forward to is pricing. Along with price, service and product reviews are also very important.


Kenny Ye

The next session was addressed by Kenny Ye, Director International Business Development & GM-India, UC Web on - The future of e-Commerce is on Mobile: Giant Leap to M-Commerce. Kenny stressed that mobile plays a very important part for all the customers today. Internet is being increasingly used by the Indian market not only for communication but also for all e-commerce activities. India is flourishing high when it comes to mobile internet. It provides business to end users and also improves the user's experience. India has taken the shortcut but not depending much on personal computers and taken a huge leap by directly going for M-Commerce.

The next session was a Case Study Presentation: 5 Strategies for Success in Programmatic Display: by Mahesh Narayanan, Managing Director India, Sociomantic Labs. Mahesh explained how programmatic display advertising is a new method of buying display advertising. Marketers can achieve immensely with programmatic display. The heart of programmatic display is Technology. Programmatic Display plays a very important role in customer retention.


Mahesh Narayanan

This was followed by a special address on The Great Online Shopping Festival by Nitin Bawankule, Director of e-Commerce and Online Classifieds, Google India. Google has been conducting Great Online Festival for the last two years. The primary objective was to provide boost to the industry and online shopping behaviour in the market and sharing the insights from the Great Online Festival. The expected outcome was massive awareness in the minds of the consumers and the second was increase the number of online shoppers. The third was an increase in the e-tailing transactions.


Nitin Bawankule

Plenary Session 3

Plenary Session 3 was on e-Commerce 2.0: Specialised categories driving eCommerce. Moderated by Anshoo Sharma, Vice President, Light Speed Advisory Services India Ltd, panellists included Samir Saraiya, Chief Executive Officer, Digital E-Life, Salil Agarwal, Co-Founder & Director, Gopeppers.com, Pushpinder Singh, Co-Founder & CEO, Travelkhana.com, Sameer Maheshwari, Co-Founder, Healthkart.com, Mayank Singh, Sr Manager Digital Commerce, Jubliant Foodworks (Dominos).

The panellists discussed on how to narrow down the right people for the particular product and how much customer engagement is important in today's market. The panel also discussed how to identify the right category of people for the product which they want to sell. Another point covered in this discussion was on how customer engagement can be done and how feasible is it for business to thrive in terms of operations and service delivery.

Plenary Session 4

Plenary Session 4 was on the listing and coupon business – Strategies for growing the market. The session was moderated by Milind Pathak, Global Head (New Business), One97 Communications Limited and panellists were Sameer Parwani, Chief Executive Officer, CouponDunia, Sumit Jain, CEO & Co-Founder, Commonfloor and Swati Bhargava, Co-Founder, Cashkaro. The panellists discussed about how the players are using customer data to increase business. e-Commerce companies in India are growing rapidly and since India is a very price sensitive market, the coupon business makes a lot of difference. The listing models revolve around driving traffic. Listing marketplace could be both B2B and B2C. Listing makes the online shopping more easy and convenient for the customers. Consumers are more attracted to the concept of cash back and coupon facility.

Swati Bhargava, Sameer Parwani, Sumit Jain and Milind Pathak

10th Marketing Conclave

IAMAI organised the 10th Marketing Conclave on 9 May 2014 in Mumbai. The Conclave began with the Plenary Session, titled 'Creating Digital First Strategies', which was moderated by Mahesh Murthy, Founder, Pinstorm. The panellists in the session were: Rubeena Singh, Chief Operating Officer, MoneyControl.com, Issac John, Head Marketing, PUMA India, K T Poovanna, Head Marketing, Vodafone Solutions Emerging Markets, Vodafone Group, Namrita Sehgal, Director Internet Marketing, Taj Group and Aroon Kumar, Head Marketing & Social Media, Valuefirst. In this session, panellists discussed how Brands, Creative Heads and Planners are thinking on Digital First Strategies. Also, the panellists threw light on how digital strategies would change in the coming years, considering the rapid pace at which the digital space is growing. The discussion was followed by an audience interaction.

The Plenary Session 2 was on 'Brands' Transformation In The Digital Age'. This session was moderated by Suman Srivastava, Chief Executive Officer, Marketing Unplugged. The panellists in this session were: Raja Chakraborty, Head Marketing, J.K. Helene Curtis, Rameet Arora, Senior Director Marketing, McDonalds India, Atul Hegde, Chief Executive Officer, Ignitee, Ekalavya Bhattacharya, Head Digital, MTV India, Priya Jayaraman, Co-Founder & Business Director, Propaganda India. This session highlighted the ways in which Brands have transformed so far and should transform in this growing digital age. The panellists debated whether the Digital is the whole new way of doing business or Digital is just another new medium for building brands. The marketers also agreed on the fact that today, the Digital space gives opportunities of not just building Brands but also making money at the same time.

Plenary Session 3 was on 'Marketing Teams In 2020: Challenges of Hiring the Right Size Teams'. Rammohan Sundaram, Chief Executive Officer, IbiboAds Ibibo Group was the moderator for this session, while the panellists were as follows: Deepali Naair, Chief Marketing Officer, Mahindra Holidays & Resort India, Sanjay Tripathy, Senior Executive Vice President Marketing, Product, Digital & e-Commerce, HDFC Life Insurance, Namrata Gill, Vice President HR, Auto & Farm Sector, Mahindra & Mahindra and Ashish Sahni, Head- Digital Marketing (Passenger Car Business Unit) TATA Motors. In this session, the panellists discussed the challenges that CMOs usually face in hiring Digital specialists. The panellists talked at length on how to justify more resources for hiring a digital marketing team and how to align this team to achieve the targets set by the higher management. The later part of the discussion was based on how to get a balanced team that could serve the overcome the challenges in the future. The discussion was followed by audience interaction.

Plenary Session 4 was on 'Are We Measuring The Mobile Right?' This session was moderated by Narayan Murthy Ivaturi, Director Global Sales & Strategy, Vserv.mobi. The other panellists of the session were: Venke Sharma, Vice President Digital, Star TV, Biswajeet Samal, Head Digital Marketing, Volkswagen India, Anand Prabhudesai, Vice President Mobile, Quikr and Raghu Seelamsetty, Managing Director, India & MENA, Sizmek.

The session started with the moderator, Narayan Murthy Ivaturi, mentioning that the mobile in itself has become a medium through which businesses are done today but doubting if anyone in the industry is doing it the right way. The discussion then went on to the metrics through which business via mobile is measured today given that mobile is considered a personalized medium of advertising. Also, the role of research in measuring the mobile was discussed by the panellists.

Sanjay Tripathy and Namrata Gill

The Breakout Sessions were held simultaneously and the first Breakout Session was titled, 'Episodic Engagement or Engagement at Every Stage: Developing Mobile Marketing Relationship' and the speaker for the session, Milind Pathak, Global Head (New Business), One97 Communications, highlighted on how mobile devices could be the ideal means of expanding marketing messages and enhancing engagement with a global customer base. The topic for the second Breakout Session was 'Reaching Media Dark Consumers'. In this session Girish Chaturvedi, Senior Group VP, Mobility, netCORE Solutions, elaborated on opportunities the mobile device has opened up for having informative campaigns and interactive communication with the target audience.

Girish Chaturvedi

The third Breakout Session was on 'Targeted, Interactive and Responsive Video Ads' by Jay Kumar Jain, Director & Co-Founder, mAdCall Digital Media. This session gave information and insights on how advertisements on mobile could be made better to achieve more customer engagement and brand recall. The fourth Breakout Session 'Social Becoming More about Online Reputation Management (ORM) and less about Visibility' by Tejas Narvekar, Head Customer Care, Germin8, was about using Social Media as a mechanism for feedback and customer relations to manage a brand's online reputation.

The speaker for the Breakout Session five: 'Mobile First: Strategies for Mobile or Mobile in your Strategies?' was Anurag Singh, Co-Founder and ED, ad2campaign. This presentation suggested that it was time to include Mobile in the core Marketing Strategies of companies and elaborated on how a Marketing Manager could include mobile in their strategies effectively. The sixth Breakout Session was on 'Multi-channel Approach: Additive or Cannibalistic?' by Sunny Nagpal, Co-Founder & Managing Director, Httpool India. He gave information on consumer consumption of media content being fragmented across digital platforms at an accelerating rate and how this multiplatform behaviour allows advertisers more opportunities to reach consumers.

The Breakout Session 7, 'Interactive Storytelling: Contentment Through Content' by Ramesh Chembath, Vice President Marketing, Godrej Appliances, demonstrated content formats suitable with their respective digital mediums and their adaptation. The session also gave information on how other content formats could be rendered more engaging and responsive. The eighth session 'The Continuously Changing Face of Lead Generation In A Rapidly Evolving Device Landscape' by Rohit Kelkar, Vice President, Sokrati, discussed the innovations and the best practices across various online channels and how these channels could be measured for better results.

Nipun Kapur

In the next Breakout Session, 'The Twitter Track: Reaching Untouched Record Destinations' the speaker, Nipun Kapur, Chief Operating Officer, WATConsult, highlighted the fact that the phenomenal box-office success of most movies is largely accredited to its digital marketing and social media publicity. Breakout Session 10, 'The Email is dead- long live the email' by Jaimit Doshi, Head Marketing & Product, Kotak Securities, was a real case study on how email is still relevant in the industry. The only thing required is a need for email to reinvent itself and be a part of a larger integrated campaign. The Breakout Session 11, on 'Optimum Marketing Automation' was by Jayraj Jadhav, Head of e-Business & Digital Marketing, TAT AIG. This presentation discussed the best practices in Marketing Automation along with the most common mistakes that marketers should avoid in the same.

The last session of the conclave was on 'All in with Mobile!' which was presented by Ravi Sundarajan, Chief Operating Officer, Webaroo. This presentation was on how businesses could effectively use mobile as a critical piece of their marketing mix and meet their customers wherever they are. In addition to the Panel Session and Breakout Sessions, the Conclave also had the Email Marketing Clinic conducted by netCORE Solutions.

Mobile Internet Conference

IAMAI organised the Mobile Internet Conference on 19 November, 2014 in New Delhi. This conference was aimed at understanding the present and future trends of the IoT, Apps, Mobile Analytics, m-VAS and m-Commerce along with the key drivers of growth, identifying challenges, and seeking solutions that will enhance the growth of the Mobile Internet Industry. The Conference began with the first Plenary Session, 'Emerging new VAS-Scope, viability and Drivers', which was moderated by Jagdish Mitra, Head Mobility Business & Large Deals, Tech Mahindra. The Panellists in this session were Aniketh Jain, CEO & Co-founder, Solutions Infini, Debasis Chatterji, Chief Executive Officer, Netxcell, Sanjay Goyal, Founder and CEO, ACL Mobile, Ajay Vaishnavi, Director Telecom, Times Internet and Sanjay Sinha, Country Manager- India, Fortumo. The panellists discussed on the current opportunities and challenges in the areas of M-Commerce, M-Governance, M-Education and Entertainment VAS. The panel also revealed the current trend in the enterprise VAS. Some important marketing tools which should be implemented to identify the right set of audience and to develop the right content for these audiences were also discussed in this session.

The second plenary session was on 'Smart Re-targeting – E-commerce & the multi screen consumer Opportunity'. This session was moderated by Narayan Murthy Ivaturi, VP Global Sales (E-commerce & Brands), Vserv and the panellists were Sachin Kapur, Head Marketing APAC Emerging Markets, Groupon, Rahul Narwekar, Founder and CEO, NDTV Ethnic Retail and Manav Sethi, Group Head Marketing, Head Digital Product, Business Head, ASKME Free ads &Deals. This session was based on how mobile is influencing various decisions of the consumers. The panel enlightened the attendees with the current state of the ecommerce industries by sharing latest statistics. Data collection is a continuous process. How to tackle the problem of constantly changing data was discussed here. The panellists also gave the attendees some key insights on the retargeting strategies used by them.

After the second session, E-commerce 2.0: The Multi Screen Consumer Opportunity was unveiled by Vserv. The product launch was then followed by a special address on 'Native Vs Web Applications for mobiles: Which should you focus on? by Shwetank Dixit, Web Evangelist, Opera Software. In this special address Mr. Shwetank Dixit gave a clear picture of what is native and web applications. What are the pros and cons of the same and what kind of businesses should focus on Native Applications and Web Applications?


Shwetank Dixit

The Plenary Session three, was on 'Using Analytics for Customer Connect on Mobile and Internet?' Manjeri Dharmarajan, Program Director Enterprise Marketing Management, IBM India was the moderator for this session while Anurag Patnaik, Senior Vice President Product, Vserv, Ambrish Bajaj, Head of Mobile, Jabong.com, Vivek Jain, Chief Product Officer, Naukri.com and Head, Naukri FastForward Business and Aroon Kumar, Vice President- Marketing and Social Media, Valuefirst Digital Media were the panellists. The session started with all the panellists sharing their experience on how analytics has helped them to engage more with their customers. The other points shared in this session were the changing trends of the market and how one can adapt to these trends via customer engagement on mobile and internet. The panel also discussed on the privacy and security aspects of the consumers using mobile applications. Lastly, they discussed how analytics could play a role in the survival of the app in the market.

The fourth plenary session was on 'Mutation of the Machines'. This session was moderated by Prasanto Roy, Advisor, CyberMedia and the panellists were Rohit Gupta, Vice President Wireless Industry Solutions, TATA Teleservices, C. Rama Krishna Reddy, Chief Executive Officer, Spoors Technology Solutions, Sandeep Aurora, Director Marketing and Market Development, Intel South Asia and Arjun Roy, Head IoT, netCORE Solutions. The session started by the moderator defining IoT i.e., Internet of Things. IoT is the sum of machine-to-machine processes, big data and Mobility management is what the panel concluded. The panel then discussed how the interaction between machine and humans has become possible with the help of IoT. The panel also spoke on the emerging business and technologies in the area of IoT.

The fifth plenary session was on 'Local-the new Focal point'. The moderator for this session was Gyan Gupta, Chief Operating Officer, Dainikbhaskar while Abhishek Nag, Growth Manager – India, Facebook, Sukirti Gupta, Chief Executive Officer, MMI Online, Pranav Bhasin, Vice President-Online Products, MakeMyTrip and Arvind Pani, CEO & Co-Founder, Reverie Technologies were the panellists. This panel focused on the growing number of mobile users and how to cater this new set of mobile users through content development. They also spoke on how language can be an important aspect when it comes to developing content or while engaging with a consumer. Primary and secondary language of the masses should be given importance while interacting with consumers. The adoption of vernacular language is a solution to a lot of problems said the panel.

The last session was on ‘Mobile Service & Social Media Apps - Disrupting Traditional Industries’ with Anurag Singh, Co-Founder & Executive Director India (AdsPlatform), Affle India as the moderator and Daman Soni, Business Head India, LINE PLUS Corporation, Nilay Arora, Vice President Marketing and Business Head, WeChat India, Steve Smith, Vice President, Mobile Streams, Rakshit Kapoor, Country Head, Buongiorno, Nishant Jain, Chief Executive Officer, Designforuse and Zubin Dubash, Chief Strategy Officer, AppsDaily as panellists. The panel give its insights on the disruption caused by the mobile app and mobile service to the traditional service or business environment and how this changing trend is affecting the service market. The session discussed how social media could be an effective tool for brands to communicate to consumers. Also the revenue generation models of an app: advertising based and transactional based were discussed in this session. With this session the conference came to an end.

The Mobile Internet Conference proved to be a major success and the attendance of more than 350 delegates throughout the day is a testimony to that.

Mobile Marketing Summit

IAMAI organised the Mobile Marketing Summit on 24 September, 2014 in Mumbai. The Mobile Marketing Summit was conceptualised with the idea of highlighting different facets of Mobile marketing and how they would be developed and deployed. The focus was on understanding the consumer behaviour with regards to mobile and allocating right marketing budgets. The summit also emphasized on the increasing growth of mobile app marketing thereby exploring the future opportunities. The platform underlined the interdependence of mobile marketing with other forms of marketing, creating a strong digital marketing strategy.

The first Plenary Session, ‘Understanding the Consumer Behaviour with regards to Mobile and allocating right marketing budgets for it - Why mobile should be in your media-mix, while building relevance by understanding consumers mobile consumption behaviour', was moderated by Ravi Sundarajan, Chief Operating Officer, Webaroo. The panellists in this session were Uday Sodhi, EVP and Head Digital Business, Sony Entertainment Television; Rajat Mehta, Group EVP & Country Head Digital & Retail Marketing, Yes Bank; Anand Prabhudesai, Vice President Mobile, Quikr; Santosh Rao, Head of Mobile, eBay India; Narayan Murthy Ivaturi, Director Global Sales & Strategy, Vserv.mobi and Pallav Singhvi, Head Online Marketing, Cleartrip. The discussion was around few key aspects like the best practices under mobile marketing, aspects that are moving the mobile revolution forward in a quick manner, how can a service and product be delivered through mobile and understanding how people consume the content through multi-screen exposure.

This was followed by keynote addresses by eminent speakers from the digital world to share their deep insights on mobile marketing. The first keynote talk was led by Rajesh Jain, Chief People Officer, netCORE Solutions who highlighted The Coming World of MarTech and spoke about the integration of marketing and technology. The second keynote talk was on The Next 100 Million by Tushar Vyas, Managing Partner-South Asia, GroupM. He stated that, 'The mobile web is increasingly becoming visual and discoverability is now social'. Neeraj Roy, MD and CEO, Hungama Digital Media Entertainment spoke on DIGITAL GOODS that are enabling a large mCommerce market and stressed on the statistics of mobile consumers. The next keynote talk was on Technology Platforms For Mobile Marketing by Michele Raspone, Chief Executive Officer, Proscape Services discussing about how to ensure launch quickly and successfully by demonstrating how Proscape helped in cutting costs and enabling technology for their clients. The last keynote talk was delivered by Nishant Rao, Managing Director, LinkedIn India who spoke on Leveraging mobile to be more productive professionals and underlined on the importance of having a simple app for your business which worked efficiently and delivered the content or service. The session concluded with the release of Mobile Marketing Handbook.

A special address on Improving Channel and Sales Productivity Using Mobile Apps was held to understand both vendor and client perspective. Beerud Sheth, Chief Executive Officer, Webaroo emphasized the vendor perspective whereas the client perspective was stressed by Sai Giridhar, Senior Vice President, HDFC Bank.

The second plenary session was on 'Marketing APPeal - Understanding the nuances of mobile app marketing for full throttle'. This session was moderated by Michele Raspone, Chief Executive Officer, Proscape Services and the panellists were Veer Chand Bothra, Chief Innovation Officer, netCORE Solutions; Jay Jain, Director and co-founder, m-AdCall Digital Media; Anand Subramanian, Director-Marketing Communications, OLA Cabs and Rohan Tyagi, Product Head Digital, ABP News. This session highlighted how mobile marketing can facilitate activities of brands, marketers, agencies and so on. Also whether mobile marketing helps innovate and improve interactions thereby growing revenues of various business models. The panellists shared their experiences and challenges they have overcome in this mobile app world domain.

There were few case studies which highlighted mobile marketing success stories. Louie Fernandes Ralph, Consulting Head of Sales, m-ADCall Digital Media shared the success story of m-ADCall through a case study. Whereas, Nitish Tipnis, Director-Marketing and Sales, Hover Automotive India discussed about Using Social Media And Mobile Marketing In The Automobile Industry and neatly demonstrated Nissan's social-only approach to the launch of its SUV, the Terrano and the phenomenal results they got from this medium last year.

Plenary Session 3 which was on 'Mobile Marketing and Social Media - Exploring The Symbiosis.' Karthik Nagarajan, National Director Social Media & Insights, GroupM was the moderator for this session while Subha Sreenivasan Iyer, Vice President (Group Media) and Digital, Godrej Consumer Products, Rajiv Dingra, Founder and CEO, WATConsult and Snehi Mehta, Head Client Solutions, Facebook India were the panellists. The panellists highlighted the interplay between the mobile and social media space. An elaboration on whether we are proceeding eventually to the concept of all mobile is social and all social is mobile. They also discussed about how to measure business goals through this medium.

The last session of the Summit, highlighted few more success stories of the Mobile Marketing world through case studies on Alive by Ankur Agarwal, Business Head, Alive Times Internet; Mobile Powerplay – The world's first Facebook led missed call campaign - Garnier Men by Rupika Raman, General Manager, Garnier Men, Loreal India and Harshil Karia, Co-founder and Digital Strategist, FoxyMoron; Coffee With Mahindra Xylo by Soumita Banerjee, Assistant Account Manager, Interactive Avenues and Effective use of mobile marketing Tata Sky by Sairam Ranganathan, Business Director, Maxus.

In addition to the Panel Sessions, Special addresses and Case study discussions; the Summit also had the Mobile Marketing Workshop by Girish Chaturvedi, Business Head GameChanger, netCORE Solutions. More than 300 delegates attended the day-long conference.

5th Travel & Tourism Summit

The 5th Travel and Tourism Summit was held on the 6 August, 2014 in New Delhi. Sharat Dhall, President, Yatra Online, delivered the welcome address on, Rise of curation in Travel Listing. This was followed by a keynote address delivered on Mobile next Game Changer- Travel & Online Industry by Rajesh Magow, Co-Founder and Chief Executive Officer, MakeMyTrip. The second keynote address was by Vishwadeep Bajaj, Chief Executive Officer, Valuefirst Digital Media on the Digital Revolution in Tourism Marketing: Growing Importance of performance marketing and driving digital interaction in the sector.

Sharat Dhall, Rajesh Magow & Vishwadeep Bajaj

The first Panel Discussion was on the topic, Social Media: Revolutionizing the approach to Customer Service, and was moderated by Aroon Kumar, Vice President Marketing & Social Media, Valuefirst Digital Media. The panel included Hanneli Slabber, Country Manager, South Africa Tourism; Sesh Seshadri, Director, Lonely Planet; Daksh Sharma, Director, Iffort; Deepa Sayal, co-Founder and Managing Director, ADG Online and Jackson Fernandez, Managing Director, Wego India. They shared their views and experiences on how Social Media Programs of various OTA's, tourism boards and hospitality industry today are focusing on stimulating conversations about their destinations through key platforms like Facebook, Twitter, Google+, Instagram and how marketers are aggressively using social media and monitoring that data to their best benefits.

Anand Subramaniam, Rajni Hasija, Andy Sleigh, Kedar Gavane, Parmod Sahni and Chiranjib Biswas

Andy Sleigh, General Manager of Asia Pacific, Skyscanner addressed the audience which was followed by the panel discussion. A workshop on Trends & Technology Innovations for Travel Industry was conducted by Tanishq Juneja, Head Consultant Email Marketing, netCORE Solutions who discussed about Responsive Email design to increase transactions from mobile users, Innovative ways to create email triggers around your customer journey, Video in Email to create a one-of-a kind experience for your customer and Email Deep Linking to attract customers and keep them coming back.

The second panel discussion was on 'End to end customer travel: Going cheaper, safer and more streamlined with the Digital', was moderated by Kedar Gavane, Director India, Comscore. The panellists Andy Sleigh, General Manager of Asia Pacific, Skyscanner; Rajni Hasija, Group General Manager IT, IRCTC; Anand Subramaniam, Director Communication, Olacabs; Parmod Sahni, Advisor, Turkey Tourism and Chiranjib Biswas, Destination Manager, Kenya Tourism Board discussed about how Digital has become an inevitable phenomenon across sectors and segments, and travel industry is no exception to it. Across all modes of travel viz. air, road and rail, digital has rendered it convenient, inexpensive and secure for travelers' right from their embarking on the journey to reaching the final destination and back.

After the panel discussion, a special address was delivered by Taranjeet Singh, Sales Director, BBC Worldwide on BBC Travel - Making the connection. The second workshop on Email Marketing - Empowering Meaningful Customer Relationships was led by Bhavneet Sekhon, Head Operations-Marketing Services, Experian Services India Pvt. Ltd. The workshop was focused on the latest global trends in email marketing and how to design effective and personalized email marketing strategies to improve customer engagement.

The third panel discussion on My Travel Buddy: My Smartphone was initiated by the session moderator Ansoo Gupta, Chief Operating Officer, Pinstorm. The speakers included in the panel were Gaurav Chiripal, Chief Executive Officer, Quadlabs Technologies; Saurabh Chakraborty, Client Partner, Facebook India; Varun Jaitly, Product Marketing Manager Asia Pacific & Japan Akamai Technologies; Chetan Kapoor, Research Analyst, Asia Pacific, PhoCusWright; Virender Bisht, Vice President-Technology Development, Make My Trip and Nikhil Ganju, Country Head, Tripadvisor.

The panellist discussed about how Cloud based technological enhancements can further enhance the value of GPS products and services. This session also highlighted how smartphone has changed the traditional travel.

The third workshop on Are you still unable to benefit from your Facebook Account?; was conducted by Rajiv Dingra, Founder and CEO, WATConsult. The workshop was about understanding consumer's

behaviour, the customers' insights, emphasizing on brand customer relationship to attract and retain customers and best practices to engage and delight consumer.

A panel discussion on Advantage Digital: 'Hotel Industry more independent than ever' was moderated by Noor Warsia, Group Editor Asia Pacific, Digital Market Asia. The panellist were Arif Patel, Regional Director Sales & Marketing, Starwood Hotels & Resorts; Prasenjeet Dutta Baruah, Head Marketing, The Oberoi Group; Rohit Kumar, Managing Director APAC, Sociomantic Labs; Tarun Lakhanpal, Head Revenue Management, Lemon Tree; Rohit Khetrapal, Co-founder, Findmystay.com and Aloke Bajpai, Chief Executive Officer, ixigo. The panel discussion was based on how digital has now empowered the Hoteliers with the 'push' power as online bookings not only help them gauge the status of business in that period of the year better but also enable them to channelize their marketing strategies and spends more efficiently.

The last panel discussion was on Tactically outsmarting the Competitor, and was moderated by Bijaei Jayaraj, Founder & Chief Executive Officer, Loyalty Rewardz Mngt and the panel included Siddharth Dabhade, Head of Travel Industry, Google India; Hari Nair, Founder & Chief Executive Officer, HolidayIQ.com; Lata Subramanian, Chief Marketing Officer, Sterling holiday resorts; Abraham Alapatt, Chief Innovation Officer & Head Marketing & Customer Service, Thomas Cook and Gaurav Gupta, Head Marketing, Hello Travel. The panellists discussed the competitive advantage that brands achieved due to differentiation that no longer holds good due to proliferation of similar looking and performing "me too" brands. They also discussed about how absolutely important and necessary it is to stop the customer from switching over to the competing products and services through Loyalty programs.

Conference on Digital Money

Continuing the success of the previous six editions, Payments Council of India (PCI) under the aegis of IAMAI, organized its two day annual conference on Financial Inclusion and Digital Payments on 9 and 10 September 2014. The conference was rebranded as 'Digital Money'.

This conference threw light on the roadmap from a traditionally cash driven economy to a less cash economy and the role of Digital Payments in achieving it. The conference was organised with the aim of working out a common agenda and roadmap to ensure adequate access to financial services at an affordable cost and in a transparent manner through various institutional agencies.

Dr. Ashima Goyal

The Theme of the conference was 'Digital Payments: Paving the way for greater Financial Inclusion-Roadmap for the Future'. The Special Addresses by Dr. Laveesh Bhandari and Dr. Ashima Goyal emphasized the role of Digital and Mobile Transfers for Meaningful Financial Inclusion and Digital Inclusion for Inclusive Growth. Mathew Titus delivered a Special Address on 'Financial Inclusion: What lessons and insights does Microfinance offer? Dr. Subir Gokarn in his special address on The Major Road Blocks on the Financial Inclusion Highway highlighted the three sides of a triangle to financial inclusion viz. Product, Delivery and Awareness.


Dr. Laveesh Bhandari

Ari Sarker, Division President South Asia, MasterCard said though India is known for paper cash, there is a huge potential to shift to electronic payments. Ludwig Schulze, Chief Executive Officer, Mistral Mobile delivered an address on Payments & Banking on Mobile: When?

The conference had sessions on Prepaid Payment Instruments -The Consumer Facet; Building Blocks for a Less Cash Economy, Merchant Aggregators, Payment Gateways and Card Networks: A Symbiosis, POS & Acquiring - Payment Innovations, Prepaid Instruments – The Corporate Facet. Gifting, Loyalty, Incentivizing - Transforming Payments Solutions, eCommerce – The ePayments Way: Gaining Momentum, White label ATMs: Assisting in Payments and Financial Inclusion.

The Valedictory Session was Chaired by Shri Vijay Chugh, Principal Chief General Manager, Department of Payment and Settlement Systems, Reserve Bank of India with Naveen Surya, Chairman, PCI and Managing Director, Itz Cash Card Ltd. and Vishwas Patel, Vice Chairman, PCI and Founder & CEO, Avenues India to discuss the various issues of the Digital Payments Industry and the limitations and challenges faced by the regulatory bodies.

Along the sidelines of the conference a closed door session was also held with CEOs of member companies and Shri G Padmanabhan, Executive Director, RBI. At this session, CEOs of various verticals such as PPIs, Aggregators, Mobile PoS operators, Card companies put forward various operational issues before Shri Padmanabhan for resolution.

The conference saw participation from the key digital money ecosystem players such as banks, prepaid payment issuers, merchant aggregators, acquirers, domestic and international transfer facilitators, payment network, payments processors, payment technology and service providers, business correspondents and many more.

IAMAI organised the 3rd Email Marketing Summit on 12 March, 2015 in New Delhi. With the phenomenal growth that e-mail marketing has seen in recent times, marketers have begun to adopt it as a one of the primary tools used for generating brand visibility and awareness. Moreover, with the web and the mobile spreading across consumers as a common platform at an unbelievable pace, the level of reach and effectiveness of email marketing had elevated several times over.

The Summit was conceptualised with the idea of highlighting the nuances of e-mail marketing which could not only amplify the efficiency of campaigns by brands and businesses but also provide an excellent metric for gauging the ROI. The focus would be on how to deal with the challenge of creating a truly personalized email experience. The customer insights are crucial and implementing smart segmentation by device types, trends, attitudes, geography and demography could be very instrumental for pertinent, tailor-made positioning.

The first Plenary Session, 'Big Data Analytics and Cross Channel Marketing', was moderated by Kunal Tomar, National Sales Manager, Experian Marketing Services. The panellists in this session were Rajneesh Chopra, Chief Sales & Marketing Officer, Rechargeitnow.com, Varun Jha, Associate Director Marketing, PayU, Vicky Sarin, Business Head & CFO, HT Digital, Prasanjeet Dutta Baruah, Head Marketing, The Oberoi Group of Hotels and Rohit Gupta, Sr. Manager, NDTV.


Prasanjeet Dutta Baruah

A Special Address on 'Creating Cross Channel Customer Journeys' was delivered by Tanishq Juneja, Business Head Email Marketing Solutions, netCORE Solutions. He emphasized on how automation could bring a difference to the businesses' marketing processes and that automation is no rocket science for any marketer to implement. The address was followed by case study presentations, the first one being on 'The New Art of Email Storytelling for Better Performance' by Hemal Patel, Director Data Services, Kenscio and Sudip Chakraborty, Head Customer Engagement, BookMyShow. The next case study was on 'Voice of customer session: Enhanced Customer Engagement through Email - A ShopClues.com Success Story' by Bhavneet Sekhon, Marketing & Client Experience Leader, Experian, Nitin Agarwal, Sr. Director Marketing, Shopclues.com


Hemal Patel

The second plenary session was on 'Ready, Set, Grow - How to Build Your Business with Email Marketing in 2015'. This session was moderated by Avinash Nitin Agarwal, Sr. Director Marketing, Shopclues.com and the Panellists were Avadhoot Revankar, Head Consultant Email Marketing Solutions, netCORE Solutions, Balaji Rangachari, Vice President Marketing & Strategy, Mahindra & Mahindra Financial Services, Satya Mahapatra, Chief Marketing Officer, Junglee Games, Prashant Jain, Marketing Head, moneycontrol.com, Protik Basu, Head Digital & Rewards, The Lemon Tree Hotel and Shweta Singhal, Head Marketing, ATMs and Cards, Deutsche Bank. The panellists in this session discussed how email marketing could be implemented in the right manner for better results in campaigns.

Thereafter, it was time for the third case study which was presented by Mahima Chawla, Marketing Head, Jazzmyride.com and Avadhoot Revankar, Head Consultant Email Marketing Solutions, netCORE Solutions.

The third plenary session was on 'The rise of customer expectation – how to engage the new age customer?' This session was moderated by Saurav Patnaik, Co-Founder & CBO, Kenscio Digital Marketing and the panellists were Parul Bhargava, Chief Executive Officer, vCommission, Anand Dubey, Vice President & Associate Marketing Partner, IndusInd Bank, Kajal Kiran, Chief Digital Marketing Manager, USHA International, Vivek Jain, Chief Product Officer, Naukri.com, Sumit Dave, Global Marketing Leader, GENPACT LLC. The Panellists in this session discussed how email marketing can be leveraged to connect with the customers in an effective and influential fashion. Next was an Insight by netCORE: Top 5 Ways to Use Live Content to Engage Your Subscribers by Avadhoot Revankar, Head Consultant Email Marketing Solutions, netCORE Solutions.

The last session of the Summit, was on 'Mobile First Designs – Exception or Expectation? The moderator for this session was Manmohan Jain, Consultant and Mentor, Octane Marketing while Anurag Gupta, India MD, SVG Media, Amber Krishan, Executive User Experience Strategist, Human Factors International, Nishant Jain, Chief Executive Officer, Designforus, Vijayant Dhaka, Sales Head, Ignitee Digital Services and Yusuf Javed, Founder & Director, Mind Digital Group were the panellists.

INTERNATIONAL EXHIBITIONS & MISSIONS

Last year we had announced in our Annual Report that since there is a need and the incipient desire to learn more and more about how the internet and mobile business operate in others parts of the world, IAMAI would like to organise learning missions to various parts of the world with senior digital leaders of India. Well, we have stuck to our promise and as a beginning, we organised the first ever Internet companies' delegation to China and the first ever India Pavilion at the Mobile World Congress in Barcelona.

CEO's Mission to China, 11-16 October 2014

During the 5-day trip to China, the 23 member strong team, which was led by Rajan Anandan, Chairman, IAMAI, held meetings with leading Chinese e-commerce and internet companies including alibaba.com; ctrip.com; HDT Mobile; Xiaomi, JD.com, Qunar and Google China amongst others.

The visit was aimed at developing sustainable business relations with focus on low cost solutions, scalability and an ecosystem to harness start-ups in digital space. The delegation included Hungama Digital Media's Neeraj Roy; Dhruv Shringi from Yatra.com, Joy Bandekar from Flipkart and Chakrapani Gollapali of Microsoft among others. We are sure this visit will play a pivotal role in setting the ball rolling towards exchange of technical knowhow and managing of large scale businesses. This visit was in many ways a learning experience for the Indian CEOs and entrepreneurs.

Talking about the e-commerce market in China, estimated to touch US$ 450 billion this year from over US$300 billion last year, IAMAI Chairman and Google India Managing Director Rajan Anandan said the massive growth has come at the back of strong growth in Internet user base. "In 2013, China had 618 million PC and 500 million Internet users. By 2016, this is estimated to grow to 790 million for PC and 690 million mobile Internet users. Compared to that, India has 243 million Internet

users," he added. A major chunk of this growth in China is happening on smartphones and tablets, he said. "We see similar trends in India in terms of smartphone growth and increasing Internet penetration. Though the numbers are small, but the opportunity ahead is huge," Anandan said.

Times Internet CEO and IAMAI treasurer Satyan Gajwani said the multi-step authentication for payment using cards makes transacting online a tedious process. "In China, options like Alipay and Tenpay ensure faster transactions for the end-customer. Simplifying the payment procedure can play an important role in further increasing online transactions in India," he said. According to Gajwani, e-commerce, digital content and advertising are the big opportunities in India. "The US is saturated and in China the story is playing out already. China is pretty similar to India with respect to connectivity mechanisms and mobile first," he said. Gajwani believes that faster than expected growth in Indian mobile consumption has attracted the attention of Chinese firms. "Chinese mobile companies have two choices. Either they can go east or west. It makes a lot of sense for these companies to come to east and capture the mobile market as India could potentially have 700 million connected smartphones in next two-three years," said Manish Vij, founder and chief executive of Smile Vun Group, an Indian digital media network. Vij was part of the delegation that spent five days in China. "Mobile browser companies, gaming and advertising companies that have become large in China, all want to come to India," Vij added.

Kiran Bhat, Founder Director - Xebec digital.intergrated, who was a part of the delegation said: "The Chinese like Indians are betting big on mobile and the maximum innovation and investments are in this space. Digital businesses definitely need to make a trip to China to see what the mobile companies are doing and what can be the future for India. Therein lies the lesson...a visit to China opens your eyes to see the future potential of India. I must truly appreciate IAMAI for making this trip happen. The group we travelled with also made a difference with members from diverse backgrounds all successful in their own right which made for lively intelligent interaction and much learning for everybody. Let's do it again."

Vikram Raichura, Managing Director, VivaConnect said that, "As an ardent lover of technology, I was elated on taking a business trip to China. I was excited for a handful of reasons and must say that I did return getting much more that what I anticipated, indeed. Visiting China was a splendid experience as it's the only country that manufactures probably everything, right from a needle to a Jet plane." Sowmya Iyer, CEO, Xebec said: "The one difference that I see between India and China is that they are really monopolistic and centralized, so they can make quick decisions and do a lot with remarkable speed. But India has too many dynamics to be able to do that. But I do hope we can make an exception for businesses in India because ultimately, business is at core of the development of the nation. If businesses flourish, start ups take off, we'll be a different nation."

Mobile World Congress Barcelona’15, 2-5 March, 2015

At the MWC 2015, a dedicated India Pavilion was set up by IAMAI, in which, a number of Indian companies showcased their products and services to a large audience of international business representatives. Top representatives from sectors such as enterprise mobile solutions provider, digital communication solutions, mobile payments, and more, were part of the IAMAI delegation, which was the first ever country pavilion at the Mobile World Congress.

At the MWC’15, ValueFirst launched ‘Tweetrix’, which has a singular focus on Twitter and managing conversations on Twitter. Tweetrix has the ability to analyze Twitter streams, detect events, predict trends and give an unparalleled and uncluttered focus for brands to manage their reputation on the medium. Aroon Kumar, Head Marketing & Social Media, ValueFirst Digital Media Pvt. Ltd, said MWC is the single largest gathering of the world’s most prestigious brands that have seen the mobile device evolve from being the fourth screen to now the primary screen for a user. Tweetrix and its ability to instantly manage your brand from this first screen device is a tremendous opportunity for ValueFirst to leverage and that is why they launched the product in Barcelona.

Talking about his experience at the MWC’15, Vikram Raichura, Managing Director VivaConnect, said that MWC was the place to be for all the mobile leaders, throughout the world, where they could gather, collaborate and conduct business. From latest gadgets to mind-blowing technological innovations, all was present under one roof. It was an exhilarating experience to breathe in that atmosphere. He further said “I understood that if the context is strong, you can create multiple concepts based on it. Internet connectivity and reach are still a problem and nearly 4 billion people across the globe live without internet access. Google has taken the job to provide internet access to such places via its Project Titan. I think this strategy is beneficial for Google, as they can later leverage on this by making new concepts based on it.” Raichura also said that Indian companies who work in international markets will be the biggest beneficiaries of participating in MWC in the coming years. MWC has huge participation from a lot of relevant people across the globe, scouting for the right products that could give them an edge in their business. Given India's reputation to create some wonderful solutions, it’s a win-win situation for both the parties.

Manish Malik, Business Head Plugged India said that MWC was a learning experience for him. He mentioned that there were lots of new device launches, new buzzword, etc. But it helps to know the overall trends. He felt that MWC is a great event for people to get together – as the entire ecosystem is there. One can crack a couple of deals and the ROI is ensured, plus the new knowledge is always helpful. Jolly Mathur Director, MoneyOnMobile, felt that the response he got from attending MWC was enormous. “We got close to about 40 hot leads from 300 odd visitors to our stall. We have much advanced technology compared to most of the countries in the world and people are open to adopt our technology and are more than willing to work with India.” He also opined that the Indian Government must participate actively like governments of other countries. Most of the countries like China, Canada, Israel and even smaller countries like Austria and Pakistan were very well represented through their Government having separate pavilions with much bigger space and batter representation then us.

Indian exhibitors included: ACL Mobile; Eros International; KeyPoint Technologies; mCarbon; My Mobile Payments Ltd; One97 Communications; ValueFirst. The India delegation included representatives from companies such as Adatrix; Apt Software; D B Digital; GaneshaSpeaks.com; Komli Media; Mobile Streams; PluggedIndia; VivaConnect, Yahoo India & Yepme.

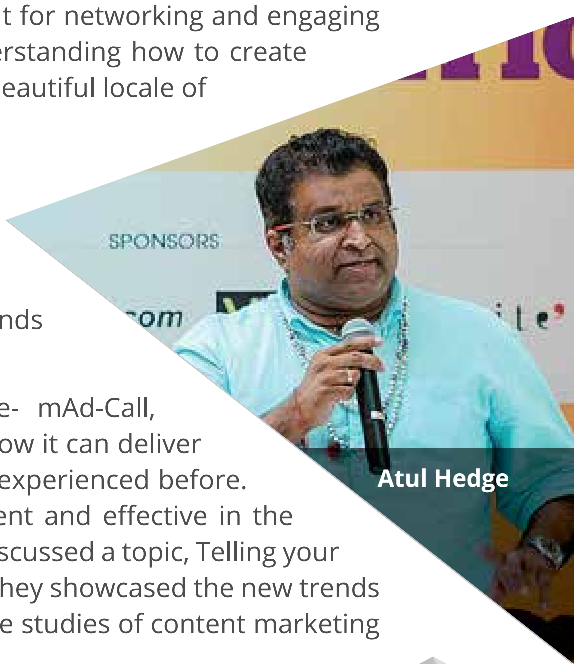
BUSINESS ROUNDTABLES

Even though IAMAI does not directly help in business development, yet for the last few years, the association has been taking efforts category development through its now well-known roundtable discussions and workshops. This year too, we organised a few roundtables to further the cause of the ecosystem. Some of these are listed below:

3rd Digital Marketing Conversations, Srinagar, 26-29 June, 2014

The purpose of the offsite is to kick-start our next generation work on digital marketing which comprises: audience measurement, mobile marketing and content driven marketing. The offsite, now an annual affair, has become a much awaited event among the marketers. The Conversation, in its 3rd year, as usual, was an all-expense paid offsite organised by IAMAI, only for the Chief Marketing Officers and Head Marketers. This is an exclusive format for networking and engaging the CMOs and the Digital Industry with the sole purpose of understanding how to create opportunities for innovation and growth in digital marketing. The beautiful locale of Srinagar added to the charm of the event.

The event sponsors moneycontrol, Vserv, m-Ad Call and Ignitee interacted with the CMOs during the knowledge sharing sessions. The first session was on topic The lost impression - Bringing back the importance of impression in the digital world, where Narayan Murthy, Vserv pointed to some alarming stats, trends and user experience experiments using some real case studies.



Atul Hedge

The second session introduced this revolutionary new vehicle- mAd-Call, demonstrated how it works, showed case-studies and explained how it can deliver brand communication in a totally new and engaging manner, not experienced before. The topic of discussion was how the m-AdCall platform is different and effective in the quality output that it provides. On the second day, moneycontrol discussed a topic, Telling your story in the Digital age: Content marketing @moneycontrol where they showcased the new trends in the content marketing space, coupled with some interesting case studies of content marketing on moneycontrol and some learnings.

The last knowledge sharing session dealt with some Live Case studies discussed by Ignitee, on Content IQ: Welcome to the 'Made for Web' content era. A few CMOs also shared their experience through case studies. An interesting session on Brands transformation in the digital age was discussed by Suman Srivastava, Marketing Unplugged.

Over three eventful days in Srinagar, the CMOs enjoyed a number of engaging activities like Presentations, Knowledge Sharing Sessions, Shikara Ride at Dal Lake, and Sonmarg, Fun Sessions, Cocktails & Gala Dinner and much more.

The various presentations and discussions brought forth some very key insights and perspectives. Participants talked about various topics pertinent to the digital media, its latest trends and the way ahead, and the fun activities got all the attendees together to share some personal time and experiences with each other in an exciting and engaging fashion.

The CMOs who participated in the 3rd Digital Marketing Conversations were:

- S. Rajendran, Acer India Pvt Ltd.
- Yateesh Srivastava, AEGON Religare Life Insurance Co. Ltd.
- Rishi Piparaiya, Aviva India
- Madan Mohan Mohapatra, Future Group
- Bedraj Tripathy, Godrej Interio
- Kartik Jain, HDFC Bank
- Sanjay Tripathy, HDFC Life Insurance Co. Ltd.
- Vasantha Kumar, IBM
- Raja Chakraborty, J K Helen Curtis
- Joy Bhattacharya, Kolkata Knight Riders
- Vivek Nayer, Mahindra
- Deepali Naair, Mahindra Holidays and Resorts Ltd.
- Nitish Tipnis, Hover-Auto Nissan
- Reema Kundnani, Oberoi Reality
- Subhrangshu Neogi, Religare
- Kamal Basu, Skoda India Pvt. Ltd.
- Nikhil Ganju, Tripadvisor
- Alokedeep Singh, Titan Company Ltd.
- George John, Warner Bros. Pictures
- Rafiq Gangjee, Yashraj Films
- Sudip Ghose, VIP Industries
- Amol Dhillon, Woodland

CXO Roundtable 29 April, 2014, Chennai

IAMAI, in association with TATA Communications, organised the CXO Roundtable in Chennai on 29 April, 2014. CXOs around the world are hoping to create customer delight that leads to a loyal customer base. Customer engagement is no longer a series of one-off experiences—it is an ongoing dialogue and the company's websites play an extremely important role in managing the customer experience. Customers on the other hand are demanding a more positive, intuitive and instant online experience- each and every time.

Amit Sharma, General Manager & Head Strategy & Marketing (India), Enterprise at TATA Communications Ltd. delivered the welcome address. He mentioned how Digital wave is creating a revolution in any Business and how Digital channels have impacted the Web and Mobile businesses and what are the challenges being faced in this channel.

Amit Sharma was the moderator of the discussion while Mr. C. R. Srinivasan, Vice President, Global Product Management, Data Centre Services for Tata Communications, J. Mahadevan, COO at Ventuno Technologies pvt. Ltd, S. Kishore Kumar, Deputy General Manager Technology & New Projects at Amtex Software Solutions Pvt. Ltd, R.M Raghunathan, Assistant VP at ReGen Powertech Pvt. Ltd., Shankar K, COO & President at Sybrant Technologies (P) Ltd., P. Ashley Samuel, Vice president-Technical, Kalaignar TV Network, Arpan Chatterjee, Senior General Manager & Business Head- Digital Content at The Hindu Group, Dr. M Ravindran, Director, Raj Television Network Limited, G Senthil Kumar, Senior Manager Technical, An Ak Exports pvt. Ltd., J. Ponnambalam, Senior Manager Digital, Sun Tv Network Limited, M Reghunathan, Director, Raj Television Network Limited and Alok Saraogi, Head Brand Marketing & Corporate Communications & Ashok Leyland were the other participants in the discussion.

CXO Power Meet, 24 July 2014, Bangalore

IAMAI in partnership with TATA Communications organized the CXO Power Meet in Bangalore on 24 July 2014. Amit Sharma, General Manager & Head - Strategy & Marketing at TATA Communications, was the moderator of the discussion & he also delivered the welcome address. He mentioned how the consumer could grab information through smartphones and other devices, how businesses & companies are moving to grab digital opportunities and what the consumer's experiences are for online services from different business verticals. He mentioned how businesses could make this digital transformation profitable rather than just an additional cost to the company.

Other participants in the discussion were Ranajoy Punja, Head Marketing development global data centre business at TATA Communications, Raghavendran N., Vertical Head IT at Adecco India Pvt.

Ltd., Ram Guruswami, Strategic Marketing Manager at Aditi Technologies, Abhilash Kumar, Lead – External Communications at Aditi Technologies, Dr. Vikram Venkateswaran, Assistant Vice President & Head Marketing at Altimetric India Pvt. Ltd., Kirti Prakash, Chief Executive Officer at Amzedia Technologies, Madhur Verma, Team Member CEO at Columbia Asia Hospital, Prashant Gupta, Associate Vice President Business Development at Divum corporate services Pvt. Ltd., Srinath T. Gopalkrishna, Vice President & Global Head Marketing & Sales at Exilant Technologies, Janakiraman R., Vice President BFSI at Exilant Technologies, Vishal Dalmia, Head Internet & Mobile at ING Vysya Bank, Vikram Sharma, Director at Intel, Partha Bhattacharya, Senior Program Manager at Mercedes Benz, Manoj Patel, Managing Director at Mobitrack, Sunil Kumar, Vice President at Managed Securities & Solution, Shankar P., VP & Head Sales & Government Relations at Paladion Software, and Madhav Patil, Vice President Business Development at SLK Software Services Pvt. Ltd.

Roundtable Discussion In Association With Akamai, 26 March 2015, Gurgaon

IAMAI in association with Akamai, organised the Roundtable Discussion in Gurgaon on 26 March, 2015. The roundtable was attended by different sectors of the e-Commerce, Travel, Hospitality industries. The speakers shared their views on how mobile as a communication and engaging medium has evolved.

Karthik Sathuragiri, Managing Director at Akamai delivered the welcome address. He pressed on the fact that the internet penetration and mobile usage has increased in the last decade, specifically in the last 3-4 years. He also focused on the fact that the average Indian broadband speed has risen to 2mbps and the number of transactions happening through the mobile platform is doubling every two years. Further, he pointed to some of the major challenges faced in the digital communication, like awareness and security.

Social Media Friday, 11 April 2014, Delhi

Rajiv Dingra

IAMAI in association with WATConsult hosted the fifth edition of the Social Media Friday on 11 April 2014 in Delhi. Social Media Friday is a unique platform where all the digital marketers across brands came together for an evening to discuss and debate, over drinks and dinner, the potential of social media and how social is not just about ideas or just about technology or just about people; it is much more than that. Rajiv Dingra, CEO, WATConsult addressed the session in Delhi and engaged the audience with his experiences on the four M's of Social Media i.e., Monitor | Manage | Market | Measure with excellent case studies and real time examples from his clientele. The event was attended by senior digital marketers from brands like Aircel, American Express, Dish TV India, DLF, GSK, Hamdard Laboratories, IBM, IFFCO TOKIO General Insurance Company, McDonald's India, The Lemon Tree Hotel Company, The Royal Bank of Scotland and a few more.

CHAPTER 3

RESEARCH

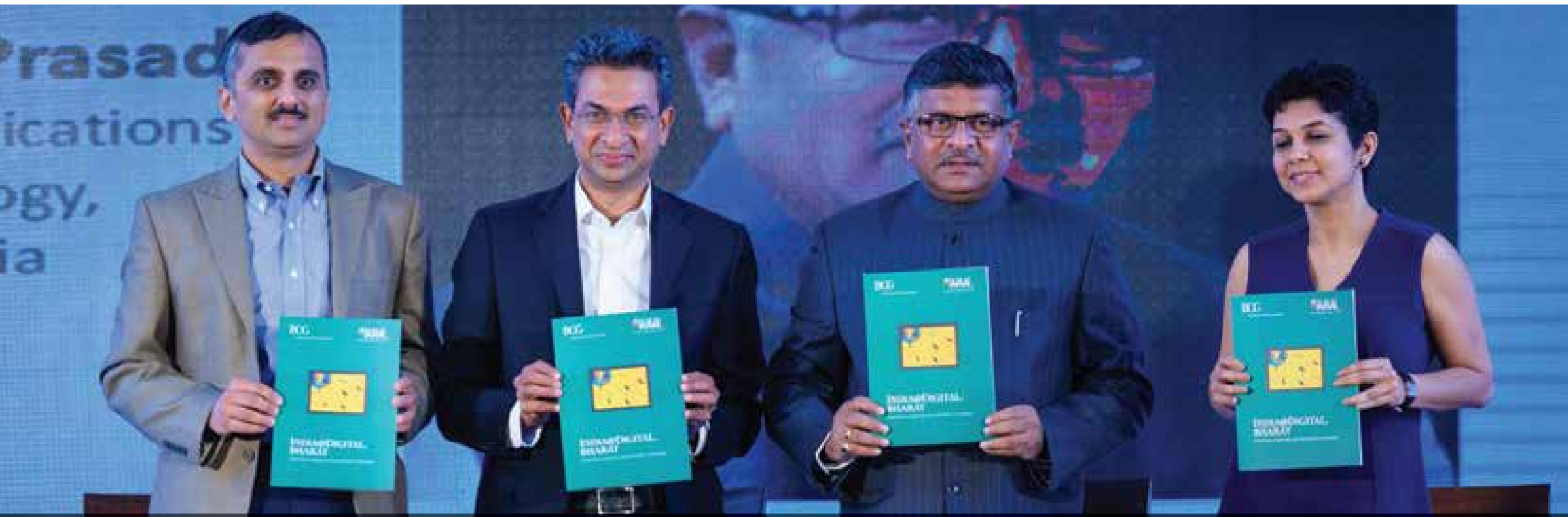
One of the key aspects of work of the Association is the various research studies it undertakes every year on the key aspects pertaining to the industry. IAMAI research continues to be the strong point and decision determinant since they started way back in 2004. The research activities at IAMAI can be clubbed under three heads: Strategic, Market and White Papers.

STRATEGIC

IAMAI undertakes various strategic research reports from time to time to understand the impediments of a growing sector and also to lay a roadmap in terms of policy formulation, which would enable a particular sector to grow. This year we have initiated several path breaking strategic research reports in association with our research partners. Some of these are listed below:

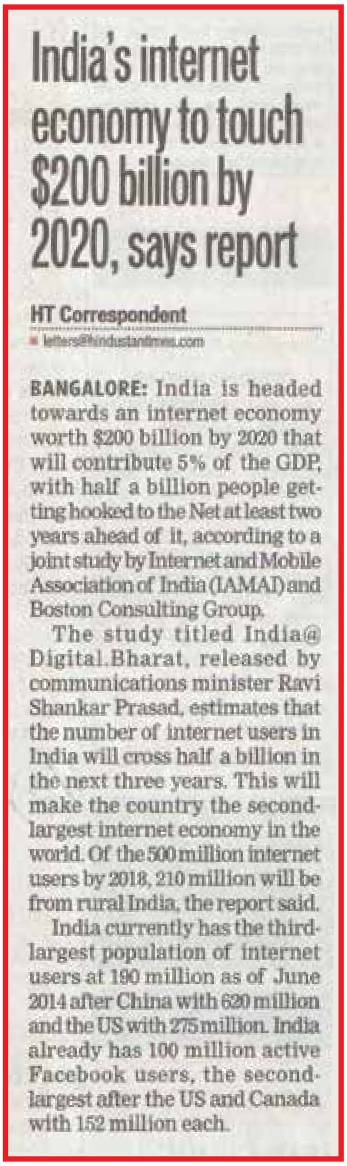
India@Digital.Bharat

IAMAI partnered with The Boston Consulting Group to prepare a report on the current and potential impact of the internet on our economy and society as a whole. The idea was to go beyond the purely financial benefits to examine how the internet is changing lives directly and indirectly. The report profiled the expected rise of internet penetration and total economic contribution as well as identified the key challenges to fully unlocking the internet opportunity. According to the report, India's internet economy will grow to US$200 billion by 2020 and will contribute 5 percent to the GDP of the country. The report also mentioned that the country's internet user base will cross 500 million by 2018, with rural internet users alone being almost 210 million. India currently has about 300 million internet users and is expected to overtake the US as the second-largest internet base in the world soon.



Alpesh Shah, Rajan Anandan, Shri Ravi Shankar Prasad and Kritiga Reddy

The report classifies Internet users into the following segments: active aspirers, professional pros, social shoppers, entertainment enthusiasts, novel networkers, late-learners and data discoverers. These, in turn, are split across three segments: Tier 1 cities, Tier II-IV cities and rural users. Active aspirers or early adopters are largely made up of youth users; entertainment enthusiasts are among the heaviest users of the Internet; late learners include groups like elders; and data discoverers are early-stage users of the Internet.



India's internet economy to touch $200 billion by 2020, says report

HT Correspondent
letters@hindustantimes.com

BANGALORE: India is headed towards an internet economy worth $200 billion by 2020 that will contribute 5% of the GDP, with half a billion people getting hooked to the Net at least two years ahead of it, according to a joint study by Internet and Mobile Association of India (IAMAI) and Boston Consulting Group.

The study titled India@ Digital.Bharat, released by communications minister Ravi Shankar Prasad, estimates that the number of internet users in India will cross half a billion in the next three years. This will make the country the second-largest internet economy in the world. Of the 500 million internet users by 2018, 210 million will be from rural India, the report said.

India currently has the third-largest population of internet users at 190 million as of June 2014 after China with 620 million and the US with 275 million. India already has 100 million active Facebook users, the second-largest after the US and Canada with 152 million each.

Rural Internet users will increase from 60 million in June 2014 to 280 million in 2018, provided initiatives such as the government's National Optic Fibre Network (NOFN) bear fruit on target. By comparison, strong support for broadband infrastructure in China has helped it become one of the largest e-commerce markets in the world, with 10 per cent of retails sales taking place online.

The 2018 Internet user base of India is projected to be 54 percent above the age of 25, 40-50 percent rural, 30 per cent female and 70-80 percent mobile. "The class of 2018 will be more rural, older, more gender-equal, more mobile and more vernacular than their counterparts of today," the report predicts. Initiatives such as Google's Indian Languages Internet Alliance (ILIA) are targeted at the next 300 million Internet users who would prefer content in their local languages.

The report further report divides Internet contributions of the economy into four areas: direct GDP contribution (connectivity, devices, infrastructure, ads, paid content and e-commerce), online transactions, productivity benefits and socio-economic impacts.

In 2013, the Internet contributed US$60 billion or 2.7 percent of India's GDP – larger than the contribution of healthcare (2.5 percent) and military (2.5 percent), but less than agriculture (14 percent). By 2020, the Internet is estimated to grow over 4 percent of India's GDP. e-Commerce will cross US$ 17 billion in 2018 and eight million SMEs (out of 13 million SMEs); 200 million individuals will transact online.

Safety of women in India is a major concern. Some technology-driven solutions have emerged, like mobile app VithU, which sends alerts as a form of improved individual security, or online safety campaigns on Avaaz.org and Change.org. This may help increase women's participation in the economy. In 2012, women constituted only 29 percent of the Indian workforce compared to China's 64 percent, according to the report.

The report also classifies Internet impacts on society into four types: better decision making, online activities replacing offline ones, outreach/inclusion and improved livelihood. Online information sources improve purchasing of electronic goods, consumer durables, automobiles, financial services and other retail items.

Social media and messaging are replacing voice calls and postal mail. E-commerce is enabling sellers to reach remote buyers without setting up shop in their neighbourhoods, or creating new kinds of business models such as LensKart and TravelKhana. Social enterprises and micro-finance, too, are enabled by digital solutions, as with Milaap and CraftsVilla.

Report on Apps

IAMAI commissioned a study to "Measure the impact of App Economy in India". The research is being done by ICRIER. The objective for commissioning this report is to understand, capture and analyse the entire 'value chain' of the App Economy in India, including importantly its impact on growth and employment. Since the App Economy is a new layer in a growing list of IT applications that have enormous economic and social impacts, the findings of this report will help in identifying the constraints to improve the existing eco-system around applications supported on smart phones and tablets in India.

This study estimates the number of jobs created by the App economy in India, and its potential to do so in the future. Apps can be enormously transformative because they use the ubiquitous mobile technology and more often than not rely on connectivity to the internet for effective functioning. The enormous promise for India stems from new thinking around smart cities, e-governance and public service delivery, agriculture, health and education - to name a few applications that seek to leverage the benefits of technology. There are apps that allows one to regulate the thermostat even when they are not at home (Nest), apps that monitor one's respiratory system and send alerts to nearby hospitals in case of emergencies (Propeller Health) and apps that interact with sensors on a farm to provide information on how crops are performing (Spensa Technologies). As everyday objects are equipped with sensors, they become data collectors and can send this data, via the internet, to apps on smart devices to produce meaningful output.

The rapid growth of apps worldwide presents a rare opportunity for India with its unique characteristics and huge service deficits. Access to mobile and internet networks can have a transformative impact on livelihoods and businesses. By making phones more powerful, smartphone applications or apps, aided by high-speed networks and innovation can create jobs and also have important productivity enhancing impacts throughout the economy as a whole. This 'app' economy comes close on the heels of similar evidence for mobiles and internet that is now firmly established as part of telecom folklore. With a few enabling policy interventions, apps can further enhance the 'value' of mobile access in a manner that was almost unthinkable only a few years ago. The potential of apps is therefore blindingly clear.

This report is also in the final stages of finalisation and is expected to be released towards the end of May or early June, 2015.

Mobile Internet Report

IAMAI commissioned a study on Mobile Internet in India. The research was conducted by KPMG, a reputed consulting firm. The objective of the report was to highlight the strategic roadmap for evolution, adoption and growth of Mobile Internet in India. The report cover the following focus areas:

'India to have 213 m mobile Internet users by June'

Yuthika Bhargava

NEW DELHI: The mobile Internet users in India is expected to reach 213 million by June on the back of growing smartphone penetration, according to a report by the Internet & Mobile Association of India (IAMAI) and IMRB International.

The 'Mobile Internet in India 2014' report, released on Tuesday, said there were 173 million mobile Internet users in India in December, 2014.

While the number of mobile Internet users in rural India is likely to grow to 53 million by June, urban India will continue to account for the larger percentage with 160 million users.

The report states that the average monthly mobile bill has increased by 13 per cent to Rs.439.

The proportion of this amount spend on mobile Internet was 45 per cent last year, and has increased to 54 per cent this year.

As compared to last year, the average monthly spend on mobile Internet has gone up by 36 per cent to Rs.235, the report added.

More than half of the mobile Internet users spend more than Rs.100 but less than or equal to Rs.500 in availing themselves of the mobile Internet services and nearly 30 per cent spend more than Rs.500 on the mobile Internet connection, it said, adding that while 33 per cent of the mobile Internet users avail themselves of rental plans with limited downloads, 21 per cent subscribe to unlimited rental plans.

The total Internet user base stood at 278 million at the end of October, 2014, quarter, and is estimated to grow to 354 million by June.

- Current State & Future Potential
- Challenges & Roadblocks
- Roadmap

Mobile Internet penetration in India is growing at a fast clip and holds a promising future with every player in the ecosystem having their own important role to play and contribution to make. While the sector faces challenges, the opportunities present outweigh the issues. Collaboration amongst the stakeholders with the government providing a supportive business environment will facilitate in ironing out the problems and put the ecosystem on a phenomenal growth trajectory.

The report finds that the Internet penetration in India has increased from 13.7 percent in 2013 to 19.19 percent in 2014. The increase in Internet penetration is function of the increasing number of Internet users and connections in India. As of December 2013, the total Internet user base in India was approximately 261 million and reached 302 million by end of 2014. It is estimated that the number of Internet users in India will touch 506.4 million by 2017. By the end of 2013, India was home to approximately 174 million Internet connections shared between wireless and wireline connections. Driven predominantly by wireless access, this number is estimated to reach 392 million by the end of 2017. By the end of 2013, wireless connections constituted about 86 percent of the total Internet connections in India and they continue to grow at a faster pace compared to the growth rates of wireline connections. Given the projected growth rates, wireless connections will increase their share in the total number of Internet connections to 89.5 percent.

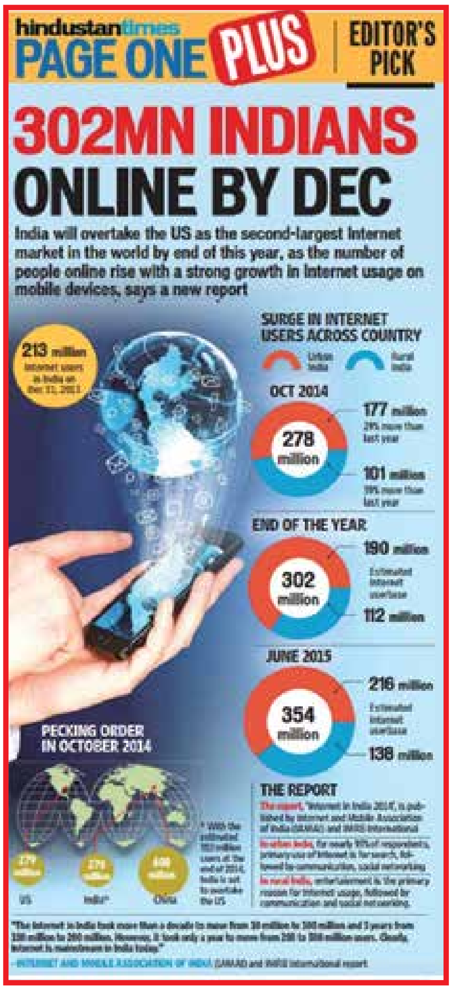
According to the report, there are definitely a few challenges that the industry is facing that are dampening its growth and widespread adoption. However, collaboration amongst industry stakeholders will put the mobile Internet penetration on a phenomenal growth trajectory and will result in widespread social impact across demographics and geographies in India. Government and regulators have a unique role to play and are required to foster a supportive business environment for industry players across service categories to propel overall reach and adoption of mobile Internet.

The report is ready and is going through the final stages of editing and proofing. The report is expected to be released in the second week of May.

MARKET RESEARCH

IAMAI is the leader in India in all market research covering internet and mobile content and services. Over the years the association has done pioneering research in such topics as mobile value added services, e-commerce, digital advertisement, internet penetration, and our numbers have become a benchmark for the industry and the government. The Market Research is meant to take a stock of the situation in terms of market size, growth and the estimated growth potential, thereby assisting the decision makers to take a holistic view of their respective verticals. As in previous years, last year too, we published a number of market research, some of which are listed below:

Internet in India 2014



hindustantimes PAGE ONE PLUS | EDITOR'S PICK

302MN INDIANS ONLINE BY DEC

India will overtake the US as the second-largest Internet market in the world by end of this year, as the number of people online rise with a strong growth in Internet usage on mobile devices, says a new report

SURGE IN INTERNET USERS ACROSS COUNTRY

Urban India | Rural India

213 million

OCT 2014: 278 million — 177 million; 101 million

END OF THE YEAR: 302 million — 190 million; Estimated Internet userbase; 112 million

JUNE 2015: 354 million — 216 million; Estimated Internet userbase; 138 million

PECKING ORDER IN OCTOBER 2014

US | India* | China

THE REPORT

The report finds that the number of Internet users in India reached 302 million by December 2014, registering a Y-o-Y growth of 32% over 2013. According to the report, the number of internet users in urban India has grown by 29% from October 2013 to reach 177 million in October 2014. It is expected to reach 216 million by June 2015. Significantly, compared to last year, in rural India, Internet users have increased by 39% to reach 101 million in October 2014. It is expected to reach 138 million by June 2015.

The report further finds that there is a huge spurt in the number of people accessing Internet on a daily basis in Urban India. As on June 2014, 31.5 million (61%) in 35 cities were using Internet on a daily basis. The daily user base has gone up by 51% from June 2013. 96% of the Internet users are accessing Internet at least once a week. Out of these, 18% access Internet 4 to 6 times a week and 14% access Internet 2 to 3 times a week.

The report also finds that in urban India, for nearly 93 percent of the respondents, the primary use of Internet is Search, followed by Online Communication and Social Networking. However, in rural India, Entertainment is the primary reason for internet usage, followed by communication and social networking. Further, the report finds that in urban India, women have led the charge in the growth of Internet users. According to the 'Internet in India' report, in urban India, female internet users grew at 30 percent, far exceeding male users at 25 percent. This is a happy trend and we believe if it continues, the currently skewed ratio between men and women stands a chance of being rectified in the near future.

A break up of urban women users' data reveals that Internet users among college going girls have increased by 62 percent, while the segment of school going girls registered a growth of 34 percent. Internet users among non-working women have grown by 18 percent. However, the growth is lower among working women when compared to other demographic groups at 8 percent. This suggests that the growth among women users would be driven by college going students and non-working women.

The report also found that in urban areas, 60 percent of the Working Women Internet users access Internet daily and 47 percent of non-working women access internet daily. The survey was conducted across 35 cities with more than 1 million populations in India.

Digital Payments in India 2014

The report established that digital payments industry grew at a rate of 40% to reach INR 120,120 crore by December 2014. The digital payment industry was pegged at INR 85,800 crore in December 2013. The report further finds that there has been a compounded annual growth rate (CAGR) of 10% since 2010 till December 2013 in payments made through digital means.

According to the report, out of around 800 million online transactions made in 2013, nearly 53

DIGITAL PAYMENTS GO UP

While digital payments in India grew 10% between 2010 and 2013, a report by IAMAI, PCI and IMRB predicts a whopping 40% growth by December 2014 to touch ₹1,20,120 crore, up from ₹85,800 crore in December 2013. Online travelling, financial services and e-tailing are the main contributors to digital payments, the report said, with online travel contributing 60% to total digital payments. 53% of the payments were made in 2013 using credit (21%) and debit cards(32%).

percent of the transactions are made using Credit and Debit cards. The volume of online payments made through Credit cards is only 21 percent while Debit cards constitute 32 percent of the payments.

Online travelling, financial services and e-tailing are the main purposes for using different modes of digital payments. Online travel industry which include air and train ticket bookings, hotel accommodations and tour packages contribute nearly 60% of the Digital payments followed by Financial services (comprising of online mobile recharge and DTH service, Online tax filing, Payment of Insurance premiums, Gas and electricity bills) and e-Tailing. Digital Downloads (including downloads of eBooks, Music, Movies, etc.) and other online services include websites for searching Jobs, Real Estate and Matrimonial contribute 4% and 2% respectively.

The report finds that the top 4 metros which include Delhi, Mumbai, Kolkata and Chennai are approximately 60 percent of the total Digital payment gateway market size. Next 4 metros - Bangalore, Hyderabad, Ahmedabad, Pune together contributes only 25 percent to the total market size.

Mobile Internet in India 2014

The number of mobile internet users in India is expected to reach 213 million by June 2015, according to the report. The report finds that there were 173 million mobile internet users in India in December, 2014. The report also finds that mobile Internet users in rural India is set to grow at an impressive rate of 33 percent from October'14 to reach 49 million by March 2015 and 53 million by June 2015. Urban India however, will continue to account for a large percentage of the Mobile Internet users across the country and is expected to reach 160 million by June 2015.

According to the report, the average monthly mobile bill has increased by 13 percent to Rs. 439. Significantly, the proportion of this amount spend on mobile Internet was 45 percent last year and has now increased to 54 percent this year. As compared to last year, the average monthly spend on mobile Internet has gone up by 36 percent to reach Rs. 235. Further, the report finds that 63 percent of the mobile Internet users spend between Rs 101 and Rs. 500 monthly on their mobile connection while 26 percent spend between Rs 501 to Rs 1000 and 7 percent of the users spend less than Rs 100 every month.

More than half of the Mobile Internet users spend more than Rs 100 but less than or equal to Rs 500 in availing the mobile Internet services. Nearly 30 percent spend more than Rs 500 on the mobile Internet connection. It is evident from the data that usage of mobile internet has gone up amongst the users from the previous year.

33 percent of the Mobile Internet users avail rental plans with limited downloads, followed by 21 percent who subscribe to unlimited rental plans. Limited download rental plans are more common across the demographic segments except for non-working women. Data reveals that 26 percent of the non-working women access rental mobile Internet plans which allow unlimited access to Internet. A similar plan is also availed by one-fifth of college going students and Working women. Nearly one-fourth of the School going kids and one-fifth of the non-working women use mobile Internet on Pay per Site basis. Nearly 40 percent of the young men, working women as well as older men access mobile Internet plans which entail limited access to Internet.

Digital Commerce in India Report

The digital commerce market was valued at INR 81,525 crores by the end of December 2014, and registered a growth of 53 percent over 2013. According to the report, the industry is estimated to grow further at a rate of 33 percent and cross INR one lakh crores by the end of 2015. The report further finds that online travel comprised a majority 61 percent of the whole Digital Commerce

Digital Commerce Market in India to Cross ₹1 Lakh Crore

Press Trust of India

New Delhi: Increasing internet penetration and growing preference for online shopping is expected to push the digital commerce market to over ₹1 lakh crore this year, a report said on Wednesday. The digital commerce market in the country had grown 53% to ₹81,525 crore in 2014, it said. This is set to rise further at 33% and cross ₹1 lakh crore by the end of 2015, added the joint report by IAMAI and IMRB International.

The digital commerce market has grown steadily from ₹26,263 crore in 2010 to ₹47,349 crore in 2012 to ₹53,301 crore in 2013.

Online travel accounted for ₹50,050 crore or over 61% of the total market, while the e-tailing segment grew by 29.4%. "Significantly, e-tailing has grown by around 1.4 times over 2013 and constitute nearly 29% of the overall share," the report said.

Mobiles and mobile phone accessories contributed the highest (41% or ₹9,936 crore) in the sales of e-tailing segment, followed by apparels, footwear and personal items (20% or ₹4,699 crore) in 2014.

Consumer durables, along with kitchen appliances added another 14% or ₹3,404 crore, the report said. Digital consumer devices like laptops and tablets, home furnishings and books contributed another ₹2,780 crore, ₹1,059 crore and ₹648 crore, respectively. The report said 45% respondents, who shopped online, preferred cash on delivery as a mode of payment.

Another 21% said they preferred payment through debit card, 16% credit card, 10% internet banking and 8% preferred other modes like prepaid cash cards, mobile wallets.

The report said segments like financial services, matrimony and classifieds grew at 5.5% and 1% in 2014, respectively.

"The financial services market has grown at a CAGR of 20% since 2010. This market was valued at ₹4,508 crore. On the other hand, the classifieds market has seen significant growth and is valued at ₹896 crore by December 2014," the report said.

pie. Significantly, e-Tailing has grown by around 1.4 times over 2013 and constitute nearly 29 percent of the overall share.

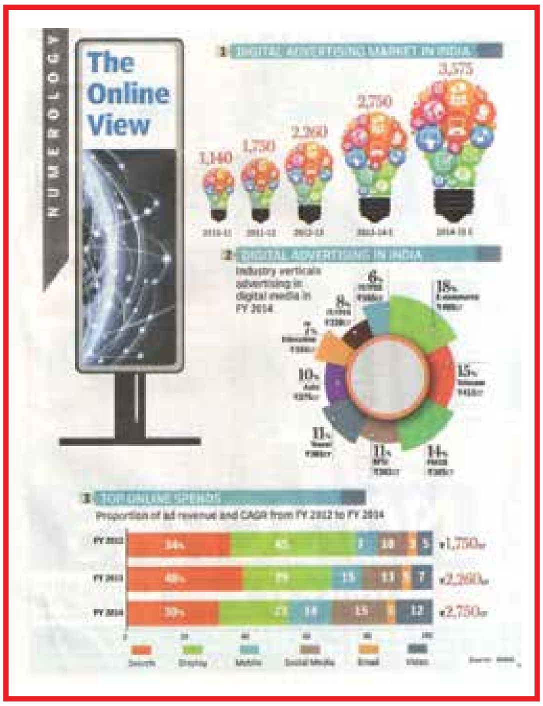
According to the findings of the report, Mobiles & mobile phone accessories contribute the most, i.e., 41 percent (INR 9,936 crores) to the e-Tailing segment followed by apparels, footwear & personal items which contribute 20 percent (INR 4,699 crores). Consumer Durables along with Kitchen Appliances contribute another 14 percent (INR 3,404 crores). Out of the remaining 25 percent, Laptops/Net Books/Tablets, Home Furnishings and Books contribute another INR 2,780 crores, INR 1,059 crores and INR 648 crores respectively.

The report also finds that 45 percent of the Online Shoppers prefer Cash on Delivery as a mode of payment. 21 percent prefer payment through Debit Card and 16 percent via Credit Card. The other modes of payment include Internet Banking (10 percent) and other payment modes viz. prepaid cash cards, mobile wallets etc (8 percent).

According to the report, the Financial services market has grown at a CAGR of 20 percent since 2010. In December 2014, this market was valued at INR 4,508 crores. The Classifieds markets have seen a significant growth and are valued at INR 896 crores by Dec 2014.

Other online services market has grown with a CAGR of 73 percent since 2010 and was valued at INR 2,025 crores by December 2014. This segment includes emerging service categories like Online Entertainment Ticketing, Online Commuting, Online Food and grocery Delivery. Online Food Delivery market has seen the maximum growth (40 percent) over the last year in this segment and it is now valued at INR 350 crores by the end of 2014.

Digital Advertisement Report 2014



According to this report, the online advertising market in India was projected to reach INR 3,575 Crore by March 2015 with a Y-o-Y growth rate of 30%. The online advertising market was pegged at INR 2,750 Crore in March 2014. The report finds that currently, Search and Display are the top two contributors to the total Digital Advertisement Spends in India. Of the INR 2,750 Crore Digital Advertisement Market, Search ads constitute 38 percent of the overall ad spends followed by Display ads which contribute 29 percent and Social Media contributing 13 percent of overall Digital Advertisement spends. It is estimated that the proportion of spends on Search advertisements will reduce and spends will increase on Email, Video and Mobile advertisements. By 2015, spends on Video ads will grow by a CAGR of 56 percent and contribute 12 percent to the overall market share of Digital Advertisements. In FY ending in March 2014, the contribution of Search spends reduced to 30 percent of the overall Digital Advertisement spends i.e. contributing INR 825 Cr to the INR 2,750 Cr Digital Advertisement market.

According to the report, Ad spends on Mobile Devices are growing at a CAGR of 43 percent and Social Media is grew at a CAGR of 41 percent y-o-y and touched INR 385 Crores and INR 440 Crores in March 2014. Spend on video grew at CAGR of 51 percent and reached INR 303 Crores. Spends on Email Ads grew at a CAGR 16 percent to reach INR 88 Crores. Further, on industry wise spends, the report finds that e-Commerce, Telecom and FMCG & Consumer durables are the top 3 verticals driving the Digital advertisement spends in India.

Besides these, work on other market research studies on Social Media and Local Language in Internet are on and will be released soon.

WHITE PAPERS

The IAMAI white papers are a means to address complex issues concerning the industry and suggest recommendations for course corrections in a time bound manner. IAMAI, last year has initiated work on a whitepaper, the details of which are mentioned below.

Data Centre Infrastructure

The Indian data centre infrastructure market is valued at US$2 billion and is poised to be the second largest market for data center infrastructure within the Asia/Pacific region. Within the IT infrastructure market, server revenue which contributes majorly to the data center market is forecast to reach US$967 million in 2016, a 28 percent increase over 2012 levels but the primary reasons for the growth can be attributed to storage capacity which is estimated to increase by almost 92 percent to US$842 million by 2016 from 2012. India is becoming a robust domestic data consumption market where digital data consumption was around 40,000 petabytes in 2010 and is expected to increase at twice as fast as the worldwide rate to 2.3 million petabytes in 2020 The market is expected to see a strong resurgence of growth-related projects across verticals viz., banking, insurance, telecom and government segment and further with the liberalization of the Information Technology market, digital-commerce and social media the quantitative impact of Data center traffic is apparent.

This paper argues that India, given the growing amount of data flows, internet users, cloud based services and a basic infrastructure and policies in place is well poised to corner a much larger than the current 2 percent share it has in the data centre business globally. This paper supports India's digital technology industry and government's Make in India plans and calls on policy-makers to put in place the right framework conditions that would enable India as a Data Centre Hub.

The objective of this paper is to seek from the regulators/government for clearer policy environment for Data center business in India that will promote Trans Border Data Flow with ease, provide tax sops/incentives to build the right infrastructure to support DC business and promote confidence in users without sacrificing expectations of privacy, security, and safety. The budget announcements will no doubt provide a reasonable level stability to the technology industry, however there is still a long way to go to harness the true potential. Therefore, this paper highlights the various legal, policy and regulatory enablers that are necessary to promote data center industry and strengthen India's positioning in the global data center market. The paper strongly defies mandatory data localization norms which would reduce competitiveness and would have a deterrent impact on the GDP of the economy and drive away India's extensive ability to attract data centre investments.

In light of the above criterion, this paper calls on policy-makers to put in place a comprehensive strategic and an industry-friendly framework that would enable India as a Data Centre business Hub. In other words, a minimum regulation and maximum facilitation policy/regulatory framework are critical to incentivize data centers in the country.

CHAPTER 4

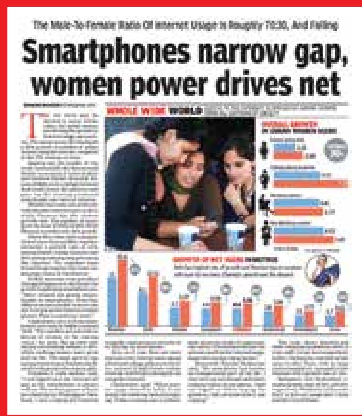
BRANDING & PR

Branding is 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.


Web firms urge Trai, DoT: Stay out of 'Net neutrality'

Industry fears any intervention by govt will kill startups in India


India set to cross US to become world's second-largest Net user


The Male-To-Female Ratio Of Internet Usage Is Roughly 70:30, And Falling

Smartphones narrow gap, women power drives net

Branding stories, articles and interviews in the print, television and online media on various areas of IAMAI's interest and work purview like Net Neutrality, IT Act, e-Commerce, digital advertising, mobile internet, social media, local language, cyber security have ensured that IAMAI is in the news for all the right reasons. Representing the business interests of 180 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.

An integrated and coordinated media campaign includes the following mix of activities:

Press Releases, By-lined Articles By the President, Media Interaction etc. Last year, IAMAI was widely covered in the mainstream media on the content of various reports that were published. The Internet in India 2014 report, The Mobile Internet in India Report, India@Digital.Bharat was widely covered in both national and international media. Other reports were also duly covered and the numbers and projections of these reports are the primary source for both Government and the Industry for policy and formulations and business decisions.

IAMAI was also in the news for its positive involvement in various policy related matters – especially on the IT Act, Net Neutrality, e-commerce, Cyber Security, Broadband Policy, Digital India vision etc. The IAMAI's writ petition in the Supreme Court and the subsequent favourable judgement of the honourable court which ruled in favour of IAMAI and other petitioners was widely reported and covered in the media.

ONLINE

For IAMAI, 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.

Social Media

IAMAI has good presence in some of the leading social networking sites. This helps us reaching the target audience and also helps in promoting IAMAI as well as sponsor brands. Followers and likes of the IAMAI FB page and twitter handle is rising on a daily basis. As of today, the number of likes of the IAMAI Faceboook page stands at 19,186. The number of 'Likes' on FB during the same time was 8164, which is more than double of what it was last year. The number of Twitter followers today stands at 3676. Last year, around the same time, the number of followers was 1860.

Weekly Newsletter

"The Week That Was" is a weekly newsletter brought out by the IAMAI 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 IAMAI secretariat.

Thinking Aloud Online

Thinking Aloud online complements the physical magazine 'Thinking Aloud', which is a monthly, published by IAMAI. The online version of the magazine reaches out to more than 1 lakh subscribers.

PRINT

Thinking Aloud

"Thinking Aloud" reflects emerging trends and varied outlook of the rapidly evolving internet and communication sector. A monthly by IAMAI, 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 Internet Freedom, Net Neutrality, Mobile Internet, Digital Advertising, Apps Economy, and cyber security. This year, we also paid special focus on interviewing CMOs from across industries to understand how and why they are using the digital medium to reach out to their existing and prospective customers. Besides, the magazine has been regularly publishing exclusive interviews with key industry leaders from across the sectors. The idea is to have more and more industry leaders 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.

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 and also those who are keenly watching this space, either as a professional or as a prospective entrepreneur.

With a steady rise in the print and online readership, Thinking Aloud is now recognized as a

credible source of information pertaining to the digital 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, IAMAI 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 is now on and we have started accepting advertisements.

Media Coverage

Mobile travel bookings to drive growth

THE WEB IS WIDENING

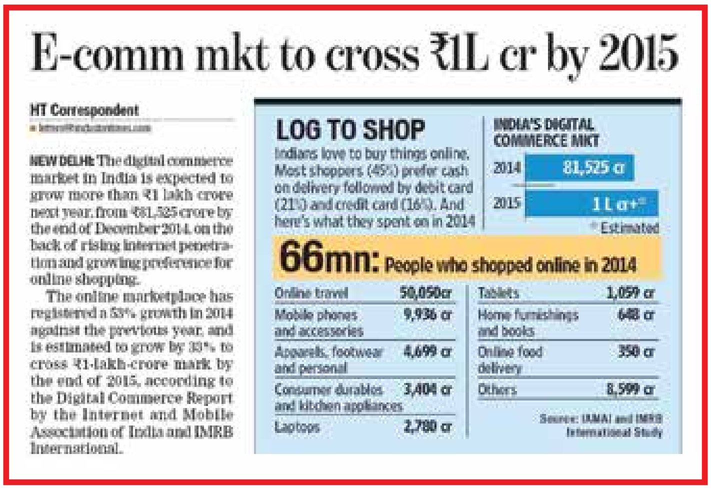
Through our constant engagement with the media, our coverage throughout the year has been satisfactory. A detailed analysis can be seen in the chart below.

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, and online media on various policy based issues, trend stories pertaining to the aspects of the digital and mobile industry segments. In fact, in FY 2014-15, our media coverage was better than FY 2013-14.

IAMAI 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 communications on the research reports and industry issues, IAMAI spokesperson gives frequent inputs to media personnel on issues falling under the purview of Internet governance, Broadband Policy, online and mobile VAS space, e-commerce, digital advertisement etc.


BIG OPPORTUNITY

Chinese companies eye India's growing mobile Internet users


E-comm mkt to cross ₹1L cr by 2015

HT Correspondent

NEW DELHI: The digital commerce market in India is expected to grow more than ₹1 lakh crore next year, from ₹81,525 crore by the end of December 2014, on the back of rising internet penetration and growing preference for online shopping.

The online marketplace has registered a 53% growth in 2014 against the previous year, and is estimated to grow by 33% to cross ₹1-lakh-crore mark by the end of 2015, according to the Digital Commerce Report by the Internet and Mobile Association of India and IMRB International.

LOG TO SHOP

Indians love to buy things online. Most shoppers (45%) prefer cash on delivery followed by debit card (21%) and credit card (16%). And here's what they spent on in 2014

INDIA'S DIGITAL COMMERCE MKT

2014	81,525 cr
2015	1 L cr+*

* Estimated

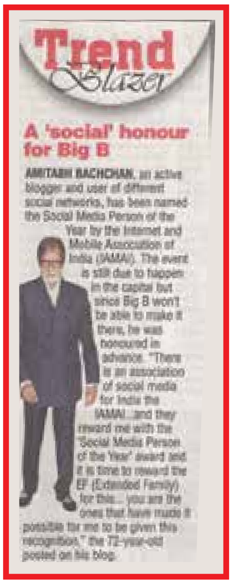
66mn: People who shopped online in 2014

Online travel	50,050cr	Tablets	1,059 cr
Mobile phones and accessories	9,936 cr	Home furnishings and books	648 cr
Apparels, footwear and personal	4,699 cr	Online food delivery	350 cr
Consumer durables and kitchen appliances	3,404 cr	Others	8,599 cr
Laptops	2,780 cr		

Source: IAMAI and IMRB International Study


Online marketplace has one million retailers


Online ad market in India likely to grow 30%


Trend Blazer

A 'social' honour for Big B

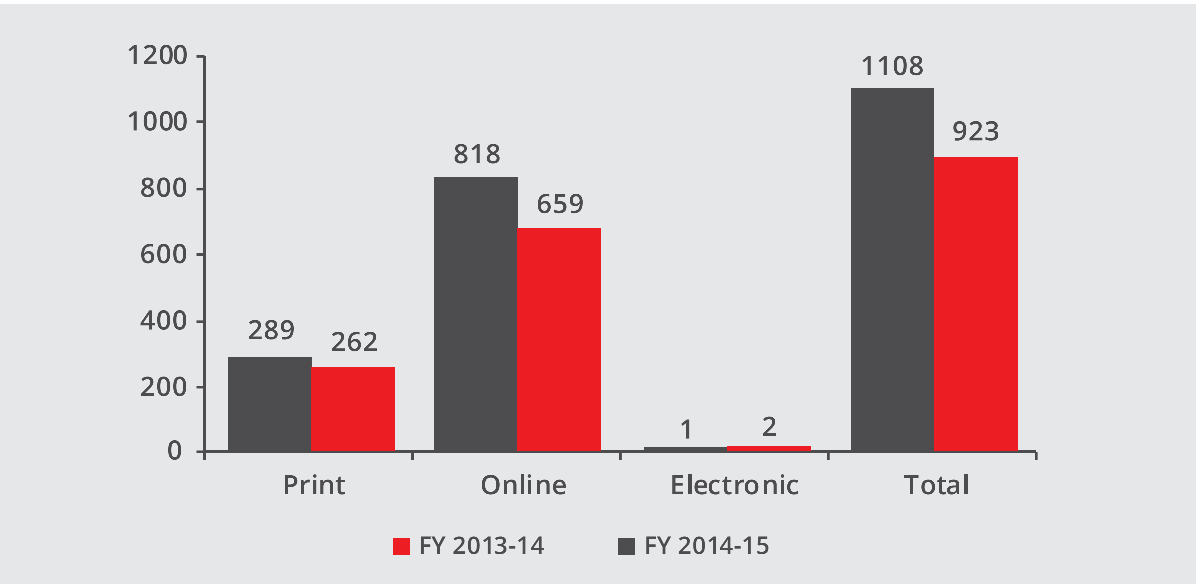
AMITABH BACHCHAN, an active blogger and user of different social networks, has been named the Social Media Person of the Year by the Internet and Mobile Association of India (IAMAI). The event is still due to happen in the capital but since Big B won't be able to make it there, he was honoured in advance. "There is an association of social media for India the IAMAI ...and they reward me with the 'Social Media Person of the Year' award and it is time to reward the EF (Extended Family) for this... you are the ones that have made it possible for me to be given this recognition," the 72-year-old posted on his blog.


New smartphones shift India's focus to app economics

TECH-IT-EASY

N MADHAVAN

BY 2018, 580 MN INDIANS WILL BE ONLINE, UP FROM 300 MN NOW, AND OVER HALF OF THEM FROM RURAL AREAS



CHAPTER 5
SOCIAL OUTREACH PROGRAMMES

Safe Surfing

The Internet has evolved as a great tool for millions across the globe. By typing just a few words into a computer, it is possible to find information about any subject. Given the many benefits, it's natural for children to explore the Internet. From seeking information to making life-long friends, getting inputs on every day curriculum, more and more students are coming online. It is, therefore, important to educate them on how to use the Internet judiciously and stay safe online.


Cyber-safe drive for schoolkids


फ्रेंड्स बन कर रखें टीनेजर्स के वर्चुअल वर्ल्ड पर नजर

With this objective, IAMAI initiated a national Internet safety campaign called 'Safe Surfing'. Safe surfing is an interactive campaign focused on students in classes sixth and above. The sessions in schools cover topics that range from maintaining confidentiality and not interacting with strangers online to tips on downloading content, posting pictures, online chatting etc. In addition to students, parents and teachers are also being educated on Internet awareness and the need to be involved with children. Last year, the safe surfing campaign gained momentum and we reached out to 1.5 lakh students across various schools in India.

Police Training

As in previous years, last year too saw IAMAI conduct various police training programme across the country. The Police Training programme is meant to sensitise the police, para military and our

defence personals about the nuances of cyber crime and the various ways to tackle or handle such crime, which are happening at an alarming regularity. IAMAI trained over 500 police personals last year as part of the Police Training programme.

Education

This year, there has been a conscious effort to increase the number of students enrolling for the Digital Marketing courses as well as increasing the number of partners. We launched two new courses on Mobile Marketing and e-Commerce Marketing in addition to the existing ones. A total of 1,550 students were certified during the year. Details are below:

NIIT	**803**
Edukart	**682**
GuttsGo	**20**
Calcutta Media Institute	**15**
SSN School of Management	**30**
Total	**1550**

Mobile 10X

An IAMAI initiative, this will serve as a forum to nurture and grow the apps ecosystem in India by bringing together the various stakeholders, fostering knowledge sharing, providing requisite inputs and resources, facilitating skills development support for App developers to enhance their professional and entrepreneurial development and support establishment of requisite enablers. This we believe will move India towards an apps economy by making it a recognized global Centre for apps development. The aim of this initiative is to make India a Global Apps Super power.

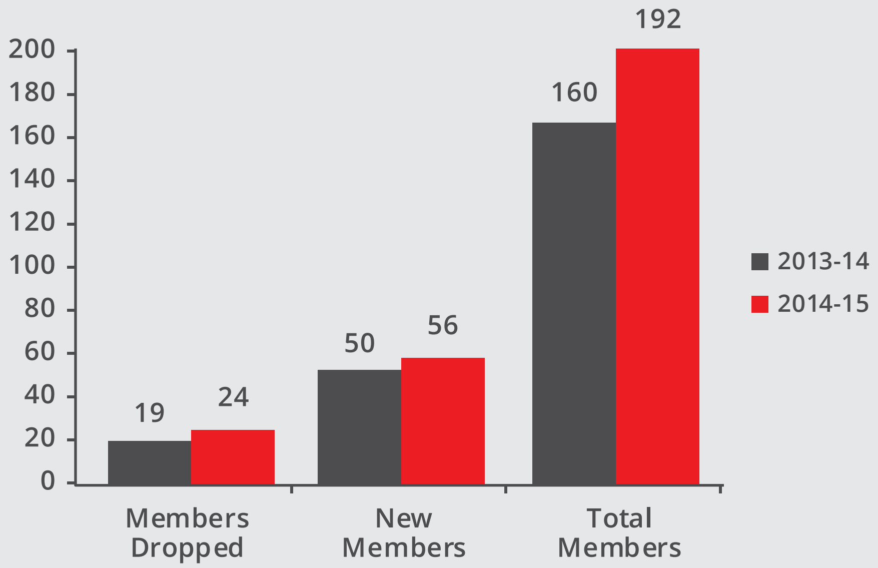
The mission is to grow the developer base, quality and market size by ten times by 2019 by intervening at different stage and level of Apps developers. The constituency of the developers would be Students, Beginner/Directionless Developers, Focused/Serious Apps Developers and funded/established developers.

The initiative is supported by industry partners like Google, Microsoft, one97. Government of Karnataka has also offered IAMAI 10,000 sqft of space to develop a center of excellence for Apps.

CHAPTER 6

GOVERNANCE AND MEMBERSHIP

During the financial year, there was a conscious effort from the secretariat to increase the membership base of the Association and include both large and small players in the ecosystem to represent the industry better. We are happy to state here that the continued efforts have paid dividends and the total membership base in FY2014-15 stands at 192, which is higher than FY2013-14. Even though 24 members dropped out due to various reasons, on the flip side, we were able to add more members as compared to 2013-14. This year, too, there will be a renewed effort to increase the membership base and scale it up to more than 200 members.



Executive Council

Rajan Anandan
Chairman, IAMAI & Managing Director & VP, Sale & Operations, Google India

Kirthiga Reddy
Vice-Chairman, IAMAI & MD, Facebook India

Satyan Gajwani
Treasurer, IAMAI & CEO, Times Internet

Governing Council

Bikram Bedi
Head - India Region at
Amazon Internet Services Pvt.Ltd.

Latif Nathani
Country Manager, ebay India

Kirthiga Reddy
MD, Facebook India

Sachin Bansal
Co-Founder & CEO, Flipkart

Rajan Anandan
Managing Director & VP, Sale
& Operations, Google India

Tushar Vyas
Managing Partner, South Asia,
Group M

Neeraj Roy
Managing Director & CEO,
Hungama

Ashish Kashyap
Group CEO, Ibibo

Nishant Rao
Country Manager, Linkedin

Mariam Mathew
COO - Manorama Online at
Malayala Manorama

Chakrapani Gollapali
General Manager,
Consumer Channels Group,
Microsoft

Prashant Pillai
Director - Busines Development
and Strategic Marketing,
Thomson Reuters

Satyan Gajwani
CEO, Times Internet

Dhruv Shringi
Co-Founder & CEO, Yatra

Committees

Government Relations Chairman	**Lizum Mishra (Amazon India)**
Digital Commerce Chairman	**Amit Agarwal (Amazon India)**
Co-Chairman:	**Salil Kumar (Bagittoday)**
Mobile Internet Content & Services Chairman	**Albert Almeida (Hungama Mobile)**
Digital Advertising Chairman	**Mariam Mathew (Malaya Manorama)**
Co-Chairman	**Amardeep Singh (Interactive Avenues)**
Payments Council of India (PCI) Chairman	**NaveenSurya (ItzCash)**
Co-Chairman	**Vishwas Patel (CCAvenues)**

ABOUT IAMAI

The Internet and Mobile Association of India [IAMAI] is a young and vibrant association with ambitions of representing the entire gamut of digital businesses in India. It was established in 2004 by the leading online publishers, but in the last 11 years has come to effectively address the challenges facing the digital and online industry including mobile content and services, online publishing, mobile advertising, online advertising, ecommerce and mobile & digital payments among others.

Eleven years after its establishment, the association is still the only professional industry body representing the online and mobile VAS industry in India. The association is registered under the Societies Act and is a recognized charity in Maharashtra. With a membership of 190 plus Indian and MNC companies, offices in Delhi, Mumbai and Bengaluru, the association is well placed to work towards charting a growth path for the digital industry in India.

www.iamai.in

Printed and published by Dr. Subho Ray on behalf of Internet and Mobile Association of India