IT INDUSTRY IN KERALA - AN OVERVIEW

Mahjabeen Aydeed “Availability and use of information for managerial decision making of information technology industry in Kerala” Thesis. Department of Library and Information Science, University of Calicut, 2015
This chapter presents a short description of the Indian IT industry. It further gives an account of IT industry in Kerala and explains the Kerala’s Information Technology policy. This chapter also intends to shed light on the important IT Parks in Kerala giving a detailed picture of Technopark in Trivandrum, Infopark in Kochi and KINFRA Neospace in Malappuram. The facts presented in this chapter relating to IT industry are gathered purely from their respective sites and their website address is provided.
Figure No. 2 IT Map of Kerala
2.1. INTRODUCTION

The Information and Communication Technology is the world's fastest growing industry that has applications in all sectors of economy. The Information Technology (IT) or the Information Technology Enabled sector (ITeS) has made significant contribution towards the development of economies in terms of its impact on gross domestic product, its capacity to absorb human resources and its ability to provide greater accessibility of innovative technology worldwide. Information Technology including the hardware and software segments of the IT industry, are vital part of every major industry. Software is an important segment in IT sector. It has quickly become one of the most profitable and dynamic sectors in the world. Realising the importance that software sectors and IT industry can contribute to the country’s economic development, India had put emphasis on IT industry as the lead sector to help in achieving knowledge based economy.

2.2. IT INDUSTRY - INDIAN SCENARIO

Information Technology industry is one of the dynamic growing industries in India. IT sector has become one of the most significant growth catalysts for the Indian economy. In addition to fuelling India’s economy, this industry is also positively influencing the lives of its people through an active contribution to the various socio-economic parameters such as employment, standard of living and diversity among others. The industry has played a significant role in transforming India from a rural and agriculture based economy to a knowledge based economy (Vijayasri, 2013). India has emerged as a global outsourcing destination for IT and IT enabled services (ITeS) over last decade. The Government is actively promoting the growth of this sector by setting up IT Parks and Special Economic Zones.
Indian IT-ITeS industry is primarily concentrated in seven locations in India, viz. Bangalore, Delhi, Mumbai, Hyderabad, Chennai, Pune and Kolkata. Established players are now exhibiting interest in exploring destinations other than these cities, with the objective of minimising costs. Some of these cities are Chandigarh, Kochi, Bhubaneswar, Thiruvananthapuram, Indore, Coimbatore, Ahmedabad and Jaipur (Meghraj, 2006).

2.2.1. Initiatives taken by Indian Government in Information Technology Sector:

In order to promote and augment the growth of IT sector in the state, Indian Government has implemented the following initiatives.

- National e-Governance Plan
- State Wide Area Networks (SWANs)
- State Data Centres (SDCs)
- Common Service Centres (CSCs)
- Open Technology Centre (OTC)

IT industry in India comprises of software industry and ITeS, which also includes Business Process Outsourcing (BPO) industry. India is considered as a pioneer in software development and a favourite destination for ITeS. The Information Technology industry has gained a brand identity as a knowledge economy due to its IT and ITeS sector. The Indian Information Technology and ITeS sectors go hand-in-hand in every aspect. Indian firms, across all other sectors, largely depend on the IT &ITeS service providers to make their business processes efficient. Indian manufacturing sector has the highest IT spending followed by automotive, chemicals and consumer products industries. Indian organisations are turning to IT to help them grow business in the current economic environment (Taranjit Singh & Batra, 2014).
2.2.2. Types of Firms in Indian IT Industry.

The industry structure in the Indian IT sector has four major categories which are the following:

2.2.2.1. IT Services

IT services constitute a major part of IT industry in India. IT services include client server and web based services. Opportunities in the IT sector exist in the areas of consulting, management and internet services.

2.2.2.2. IT Enabled Services

The services which make extensive use of information and telecommunication technologies are categorised as IT enabled services. The IT enabled services is the most important contributor to the growth of the IT industry of India. Some of the important services covered by the ITeS sector in India are customer-interaction services including call-centres, back-office services, revenue accounting, data entry and data conversion, HR services, transcription and translation services, content development and animation, remote education, data search, market research and network consultancy.

2.2.2.3. Software Services

Software products are among the most highly exported products from India. The software industry in India originated in the 1970s and grew at a significant pace in the last ten years. Between 1996-1997 and 2002-2003, the Indian software industry grew more than five times. During the same period software and service exports from India grew by almost twelve times.
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2.2.2.4. Hardware

The hardware sector of the IT industry focuses on the manufacturing and assembling of computer hardware. The consumption of computer hardware is high in the domestic market. Due to the rise in the number of IT companies, sale of desktops, laptops, servers, routers, etc. have been on the rise in recent years. Many domestic and multi-national companies have invested in the computer hardware market in India (Bhosale, 2011).

Table 1 shows the major cities of India were the IT activities are concentrated.

Table: 1
Top 10 IT hubs in India

<table>
<thead>
<tr>
<th>Ranking</th>
<th>City</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bangalore</td>
<td>Popularly known as Silicon Valley of India and is the leading software exporter from India. Also it is a global IT hub of India.</td>
</tr>
<tr>
<td>2</td>
<td>Chennai</td>
<td>The second largest exporter of IT and ITeS of India, and is the BPO hub of India. It has the largest operations centres of TCS and Cognizant.</td>
</tr>
<tr>
<td>3</td>
<td>Hyderabad</td>
<td>Major IT hub in India, also known as Cyberabad which consists of many multinational corporations such as Google, Facebook, Microsoft, Amazon, Oracle etc.</td>
</tr>
<tr>
<td>4</td>
<td>Mumbai</td>
<td>The Financial capital of India, but recently many IT companies established offices.</td>
</tr>
<tr>
<td>5</td>
<td>Delhi</td>
<td>The national capital region comprising Delhi, Gurgaon and Noida are clusters of software development.</td>
</tr>
<tr>
<td>6</td>
<td>Pune</td>
<td>Major Indian and International firms are in Pune. Pune is also CDAC Headquarter.</td>
</tr>
<tr>
<td>7</td>
<td>Kolkata</td>
<td>Major back-end operational hub for IBM, Intel, Deloitte, Sun micro systems etc.</td>
</tr>
<tr>
<td>8</td>
<td>Bhubaneswar</td>
<td>An emerging IT and education hub and it is one of the India's fastest developing cities.</td>
</tr>
<tr>
<td>8</td>
<td>Thiruvananthapuram</td>
<td>Houses major IT companies including Oracle, TCS, Infosys, and contributes in IT export of India.</td>
</tr>
</tbody>
</table>

(Taranjit Singh & Batra, 2014)
2.3. IT INDUSTRY- KERALA SCENARIO

The economy of Kerala reaped huge benefits from its blossoming industrial sector. The traditional industries in Kerala particularly coir, handloom, Khadi, bamboo-based, handicrafts, artisanal and cottage industries etc. are plagued by the problems of high cost production, low quality, inappropriate technology and incapacity for professional marketing and export. In Kerala, compared to the traditional industries, the Information Technology industry has emerged as a key driver of global economic growth.

The State of Kerala has always been a forerunner among the states of India in the adoption of ICT for enabling smoother functioning of the business community. Government of Kerala is keen to play a catalytic role for the development of IT industry within the state, as it is ideally suited for such a densely populated state, having vast multitude of highly qualified and experienced human resources, uniformly spread across the state. The state, with its high quality of life index and social infrastructure development, is a launch pad for economic development and growth. Two cities in Kerala – Thiruvananthapuram and Kochi have been ranked as the challenging IT or ITeS destination by NASSCOM. The world class IT infrastructure facilities at Technopark in Thiruvananthapuram and Infopark in Kochi make these IT hubs much sought after destinations in the state. The Government of Kerala also acknowledges the critical importance of information technology as an instrument for the state’s overall development and remains deeply committed to its dissemination, both as a crucial engine of economic growth and as a tool for increasing productivity, speed & transparency in governance. Kerala offers tremendous potential for the application of IT due to reasons which include:
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a. Ease of geographical access, both longitudinal and lateral.
b. Large migrant population with demands for connectivity.
c. Extensive telecom network reaching all towns and villages.
d. Remarkable growth in education, health and other services.
e. High literacy and availability of educated youth.
f. Export-based trade and commerce.
g. Potential for tourism industry (Raman Kumar & Kochher, 2011).

2.3.1. Information Technology Policy of Kerala

The Government of Kerala acknowledges the critical importance of Information and Communication Technology as the key vehicle for the state's overall equitable development. The State Government announced its first IT Policy in 1998. It was followed by IT Policies in 2001, 2007 and 2012 which provided comprehensive support for the further development of this sector. These policies have helped Kerala to achieve unique distinctions as a preferred IT / ITeS investment destination and also a leader in E-governance. This industry policy document endeavours to delineate a strategy for harnessing the opportunities and resources offered by information technology for the comprehensive social and economic development of the state. The IT policy reiterates the government’s commitment for creating an ideal IT investment climate, especially for knowledge-intensive and high-value ICT services. The developments made in creating world class ICT infrastructure spread across the state, centred on major cities like Thiruvananthapuram, Kochi and Kozhikode has made Kerala one of the best networked states in the country.
2.3.2. IT Organisations in Kerala

The major IT organisations working in Kerala are the following:

2.3.2.1. Kerala State Information Technology Infrastructure Ltd (KSITIL)

KSITIL is the apex company formed under the Government of Kerala for pioneering the development of IT/ITeS Special Economic Zones (SEZs), IT Townships and IT Parks in the state of Kerala. It will create basic infrastructure including road access, water, and electricity for each project (Government of Kerala, Department of Information Technology, 2012).

2.3.2.2. Indian Institute of Information Technology Mission - Kerala (IIITM-K)

Indian Institute of Information Technology and Management-Kerala (IIITM-K) was set up by the Govt. of Kerala in 2000 as a premier institute of excellence in post graduate education and research in the area of Information Technology, Science, Management and related information that develops professionals and leaders of high calibre imbued with the values of entrepreneurship, ethics and social responsibility.

2.3.2.3. Centre for Advanced Training in Free and Open Source Software (CATFOSS)

FOSS finishing school aims to propagate open source technology and provide optimal cost solutions by developing software tools. “CATFOSS” set up at ITeS Habitat Centre, Kaloor, and Kochi was run by KSITM.

2.3.2.4. Model Finishing Schools

Model Finishing School is a pioneering venture of Kerala Government, set up with the purpose of enhancing employability of qualified youths from Kerala. It is a joint initiative of IT department, Government of Kerala and the
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Institute of Human Resource Development (IHRD) with the support of Infosys. Model Finishing School aims to equip students in Kerala in those aspects of learning, most desired and favoured by the employment providers.

2.3.2.5. Akshaya

Akshaya, an innovative project implemented in Kerala aimed at bridging the digital divide, addresses the issues of ICT access, basic skill sets and availability of relevant content. It is acting as an instrument in rural empowerment and economic development. The project is a catalyst in creating massive economic growth and creation of employment in the state by focusing on the various facets of e-learning, e-transaction, e-governance etc.

2.3.2.6. ITeS Habitat Centre

The Department of IT, Government of Kerala, has set up India's first exclusive ITeS training centre in Kochi. ITeS Habitat Centre conducts various training programmes for students in Spoken English, Business English Certification (BEC), and Call Centre aimed to enhance the communication skills required for IT or ITeS industry. The centre offers support facilities for IT or ITeS companies in the budding stage.

2.3.2.7. Kerala State Information Technology Mission (KSITM)

Kerala State Information Technology Mission is an autonomous nodal IT implementation agency for the Department of Information Technology, Government of Kerala established in 1999. The main objectives of KSITM are to strengthen the E-Governance, IT infrastructure development, interfacing between the Government and industry, strengthening the IT or ITES industry base, advising the government on policy matters etc.
2.3.2.8. Standardising, Testing and Quality Certification (STQC)

STQC Directorate is an attached office of the Department of Electronics and Information Technology, Government of India which provides quality assurance services in the area of electronics and IT through countrywide network of laboratories and centres. The services include testing, calibration, IT & e-governance, training and certification to public and private organisations. STQC has specialised institutions such as Indian Institute of Quality Management (IIQM) for quality related training programs, Centre for Reliability (CFR) related services and Centre for Electronics Test Engineering (CETEs) for skill based trainings.

2.3.2.9. Centre for Development of Imaging Technology (C-DIT)

C-DIT is a unique organisation that has four functional groups, each specialising in a core area, viz. communication, technology, education & training and operations group. It has been functioning as a total solutions provider to the departments under the Government of Kerala in the areas of ICT applications and in the supply of holography based security products.

2.3.2.10. Information Kerala Mission (IKM)

Government of Kerala has setup IKM with a mandate to strengthen the local self-governance through ICT applications. It is the most comprehensive local body computerisation project in country, which envisages computerising and networking the local self-government institutions in Kerala. It addresses the entire issues concerning local body governance, decentralised planning, and local economic development.

2.3.2.11. National Informatics Centre (NIC)

NIC provides network backbone and e-governance support to Central and State Government, UT Administrations, Districts and other Government
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bodies. NIC Kerala State Centre is involved in IT enabled applications and changed the mindset of working community in Government to make use of the latest state-of-art technology in their activities to provide better services to citizens. NICs’ in Kerala includes the State Centre and Network Operations and Data Centre in Trivandrum, District Centers at 14 districts headquarters and Software Development and Training Centre, Kochi (Government of India, Department of Electronics and Information Technology, 2012 ).

2.3.3. IT PARKS IN KERALA

The IT sector of Kerala spread across its 10 IT Parks which provides employment to about 2,00,000 people. Technopark in Thiruvananthapuram, Infopark in Kochi, Cyberpark in Kozhikode and Rural IT Parks (Techno lodges) are the three main IT Parks promoted by Government. Taking into consideration of demand for built up space inside the Government owned IT Parks, the Park invite private developers established in India and abroad to construct more built up space. In order to increase the availability of IT infrastructure, Government also promote IT Parks in private sector outside the Government owned IT Parks. Government frames guidelines and standards for private IT Park certification. Private IT Parks that meet the certification is governed by the same set of industry enabling regulations that are applicable to Government owned IT Parks. Some of the important private IT Parks are Smart City, L&T Park, Leela Park, Brigade Park, Muthoot Park etc. (Government of Kerala, Department of Information Technology, 2012).

Table 2 depicts a snapshot of Government owned IT Parks in Kerala
## Table: 2
**A Snapshot of Government owned IT Parks in Kerala**

<table>
<thead>
<tr>
<th>IT Parks</th>
<th>Locations</th>
<th>Description</th>
</tr>
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</table>
| TECHNOPARK  | Trivandrum         | Launched in 1990  
Largest IT Park in India in terms of built up area.  
Developed through four phases, I, II, III and IV.  
Techno City (Fourth phase): Integrated Township and offers business spaces and social infrastructure for IT /ITeS industry which is in a developing stage. |
| Kollam      | Launched in 2011  
Technopark in Kundra, Kollam is the hub and spoke model of development of Technopark, Trivandrum. This Park is being developed as the Special Economic Zone. |
| Kochi       | Established in 2004  
Developed through Phase I and Phase II. Phase II is in developing stage.  
Co-developers: Leela, Wipro, Brigade Group, TCS and Lulu Cyber.  
Smart city: (Under construction) |
| Koratty, Thrissur | Launched in 2009  
30 IT/ITeS companies.  
Non- Special Economic Zone |
| Cherthala, Alappuzha | Launched in 2011  
Public Private Participation model  
SEZ land is under the possession of Kerala State IT Infrastructure Ltd. |
| Ambalapuzha | Started in 2011  
Designed as the first water theme IT Park in India (In developing stage)  
Public Private Partnership Model |
| Kozhikode   | Launched in 2014  
Third IT hub of Kerala Govt.  
Hub for developing IT/ ITeS sector in the Malabar region. |
| CYBERPARK   | Kannur and Kasaragod | SEZs are developed for the promotion of IT, ITES and other knowledge industries in the Kasargod district.  
25 acres is proposed to be developed initially as an IT/ ITeS specific SEZ in Kasargod.  
Cyberpark, Kannur is the first spoke as SEZ for the overall development of IT industry in Malabar region in general and Kannur district in particular. |
| KINFRANEOSPACE | Kakkenchery, Malappuram | Launched in 2003.  
The only one IT Park of KINFRA.  
First IT Park in the Calicut area  
28 IT companies with more than 2000 employees. |
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The major IT Parks in Kerala concentrated in the study are discussed below.

2.3.3.1. TECHNOPARK

Technopark, the first and largest technology park among the three largest IT Parks in India was launched in 1990 and became operational in 1994. Technopark was developed by the Electronic Technology Parks-Kerala, an autonomous society under the Department of Information Technology, Government of Kerala. There is a Chief Executive Officer who is the head, a Governing Council and a Program Implementation Board who are the top officials of the Government. Technopark, the IT hub of the state of Kerala is located in the city of Thiruvananthapuram. In the beginning, Park Centre, Pamba and Periyar were the only buildings in Technopark. Since then, Technopark has periodically added new buildings such as Nila, Gayathri, Bhavani, Chandragiri and Thejaswini. All the main administrative offices are in the Park Centre building. Technopark spread over 750 acres and hosts over 285 IT and ITeS certified companies, employing over 40,000 IT professionals. Technopark as a part of the hub and spoke model of development has expanded its activities to Kundra, Kollam, and this Park comes under the direct control of Technopark Trivandrum. This Park is being developed as a Special Economic Zone.

Technopark offers a one-stop solution to the business needs related to IT, communication and entertainment. The different firms in Technopark include domestic firms, joint ventures and subsidiaries of foreign companies engaged in a wide variety of activities like embedded software development, smart card technology, Enterprise Resource Planning (ERP), software design and development, engineering and computer aided software development. Technopark also hosts a Technology Business Incubation Cell, Technopark Business Innovation Centre, Software Competency Centre and Technopark e-
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campus that leads the Technopark community to a world-class e-learning environment for continuous upgradation of skills. Quality environment, international standard infrastructure, a comprehensive umbrella of support services and easy access to excellent human resources and remarkable ease of starting up made Technopark India's most promising IT destination.

Technopark was developed through the phases of 1, 11, 111 and IV. In the first Phase 300 acres with 4 million square feet of built-up space was developed. It consists of 180 IT and ITeS companies employing over 25,000 IT professionals. In Phase II, 86 acres of land was added. Phase III was developed by adding 92 acres of land (SEZ-27.5 acres) and Phase IV (Technocity) by adding 500 acres that includes space not only for IT / ITES Industry but also residential, commercial, medical and educational facilities (Technopark, 2010).

2.3.3.2. INFOPARK

Infopark is an autonomous society under the Department of IT, Government of Kerala. The vision of Infoparks is to provide a holistic enabling environment to make knowledge industry intrinsically competitive and world class in the state. Infopark consists of four IT parks spread over 350 acres of land. The Infopark campus is divided into Special Economic Zone (SEZ) and Non Special Economic Zone. Around 240 acres are notified as Special Economic Zone. About 150 companies with more than 20,000 Techies are employed in these four locations. The Governing Council of Infopark is chaired by the Honourable Chief Minister of Kerala. The Board of Governors of Infopark is chaired by Special Secretary of Information Technology. Infopark has been growing fast since its inception in 2004, and within a short period of time, it has attracted investments from IT majors like TCS, Wipro, Affiliated Computer Services (ACS), OPI Global, IBS Software Services and US Technology. Infopark is located in Kochi, Thrissur,
Ambalappuzha and Cherthala. InfoPark Kochi acts as the hub to these Parks. Infopark Kochi is located in 100.86 acres of land at Kakkanad village of Kanayannur Taluk in Ernakulum district. Around 80 acres has been notified as an IT sector Specific Economic Zone by Ministry of Commerce, Government of India. Infopark consists of many buildings - Government owned, Private owned and the buildings under construction. Government owned buildings are Thapasya, Vismaya and Athulya and private owned buildings are Leela Phase 1, Phase 2, Phase 3, Phase 4, Tejomaya, Wipro and Lulu Cyber (Infopark, 2007).

2.3.3.3. KINFRA Neospace

Kerala Industrial Infrastructure Development Corporation, KINFRA aims at bringing together all the suitable resources available in the state and developing infrastructure and dedicated to catalyse industrial growth of Kerala by providing the best industry specific infrastructure. The most fascinating feature of KINFRA is that it offers single window clearance facilities. The Parks of KINFRA are scattered in different parts of the state. In working towards its goal of metamorphosing Kerala into an industrialised state, KINFRA takes utmost care to protect the natural environments as the state is one of the greens in the country.

Since inception, KINFRA has mainly identified itself with land acquisition and development of industrial infrastructure in the form of Parks or Townships. With the objective of boosting industrial growth, KINFRA has been promoting the concept of Theme Parks, which have been set up for the exclusive growth and development of specified industrial sectors. Food Processing Parks, Apparel Park, Film and Video Park, Export Promotion Industrial Park, Information Technology & Electronics Park, Herbal and Ayurveda Parks, etc. are some of the theme Parks already implemented by KINFRA. Government has given special thrust to the promotion of food processing industry due to enormous potential of sector for development.
KINFRA has also set up Small Industries Parks under the Integrated Infrastructure Development Scheme of Govt. of India, catering exclusively to small scale industrial units in thrust sectors in the state. Such Small Industries Parks have been set up by KINFRA at Trivandrum, Ernakulam, Thrissur, Wayanad and Kasargod districts. Another park of its kind is being developed by KINFRA at Kunnanthanam in Pathanamthitta district.

The head office of KINFRA is located at Vellayambalam, Thiruvananthapuram. It has identified over 20 core competency areas as avenues for investment. It has 12 well developed industrial Parks of which some are functional and others are in the launching phase. Each of these Parks offers comprehensive infrastructure and support services to the client. The following are the projects undertaken by KINFRA:

- KINFRA International Apparel Park, Thiruvananthapuram
- KINFRA Export Promotion Industrial Park, (KEPIP), Kochi
- KINFRA Food Processing Park, (KIFPRO), Malappuram
- Film and Video Park, Thiruvananthapuram
- Sea food Park, Alappuzha
- Rubber Park, Ernakulam
- Western India KINFRA Ltd., Palakkad
- KINFRA Small Industries Park (KSIP), Thiruvananthapuram
- KINFRA Small Industries Park (KSIP), Ernakulam
- KINFRA Small Industries Park (KSIP), Thrissur
- KINFRA Small Industries Park(KSIP), Wayanad
- KINFRA Small Industries Park(KSIP), Kannur
- KINFRA Small Industries Park(KSIP), Kasargod
- ICICIKINFRA Ltd. (I – Kin), Thiruvananthapuram
- KINFRA Neospace, Kakkenchery

KINFRA Neospace located in Kakkanchery, near the University of Calicut in Malappuram district is developed by the Kerala Industrial
Infrastructure Development Corporation, a statutory body of the Government of Kerala, and responsible for the development of state-of-art infrastructure for industries in the state. Neospace is the first such IT Park in the Calicut area, the third largest city of Kerala state in India. Neospace is a 7 storied building with a total built-up module of 85,000 sq. ft. which is situated in KINFRA Techno Industrial Park Kakkanchery which is a 100 acre industrial Park where 30 acres are allotted for Special Economic Zone (SEZ) for food processing, 60 acres for non SEZ food processing and 10 acres for Information Technology.

The thrust areas of Neospace are Software development, Electronics; IT enabled Services and Bio Technology. There are 26 IT companies operating in Neospace which delivers high-quality IT services to clients around the world. BPO provides outsourcing services for bookkeeping, accounting, payroll management, and human resource administration. It also offers services in web development, software development, e-commerce website designing and maintenance, domain registration and web hosting. Companies range from those working with the State Information Infrastructure Project to units providing software solutions to domestic and international business firms. Some of them offer management consultancy tools, animation, advertisement and designing services, business management system software’s and business intelligence website development.

The Techno Industrial Park of Kerala Industrial Infrastructure Development Corporation (KINFRA) at Kakkancherry, bordering Kozhikode and Malappuram districts, is attracting small and medium enterprises (SME), particularly in software field. Majority of these companies dealt with software development, web designing, e-business application, web hosting application and business process outsourcing. The company delivers high-quality IT services to small and medium clients around the world. It is also slated to become another Special Economic Zone in north Kerala (KINFRA Neospace, 2008).
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2.4. CONCLUSION

Today, Kerala is one of the most predominant IT destinations of the world. This has been achieved by committed and talented human resources with innovative initiatives. The excellent quality of life, well established government policies, low operational costs and attrition rates, has transformed this beautiful land into one of the most favoured IT hubs for investors. But the performance of Kerala is not spectacular compared to that of other southern states. Kerala contributes only a nominal share in the overall software export of India, indicating the extreme low level of IT activity in state. The government realises the potential of this sector in the economic development of state and is facilitating the creation of a sound IT production base.
REFERENCES


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