



**PROBABLY THE BEST ICT CLUSTER
IN THE WORLD**



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- DENMARK UNCOVERED
- GENERAL BUSINESS ENVIRONMENT
- DANISH STRONGHOLDS
- DENMARK IN INDIA
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MYTH

- Denmark represents the dark side of Europe
 - Its actually quite central
- No one in Denmark speaks English
 - Most people do
- Denmark is famous for cows, cheese & cookies
 - No longer, there is much more
- The Sun never shines in Denmark
 - It actually does sometimes for 18 hours in a day!
- Denmark is home to many famous brands



Did you know

- World most liveable city – Copenhagen
- Denmark's one of the fashion capitals of the world
- Happiest people in the world – Danish
- Danes get more stressed out planning holidays/family events
- Denmark is world women's handball champion
- 20% of energy used is wind power
- Danish company AP Moller has majority stake in Pipavav port in Gujarat
- Suzlon Energy's global hq for sales and project mgt in Denmark – 125 + people working



Did you know these brands are Danish



EXCELLENT LOCATION

- 1 hour
- 2 hours
- 3 hours



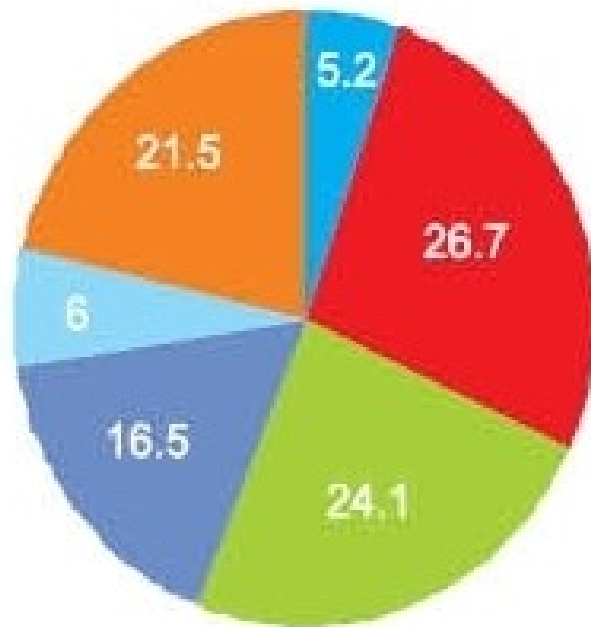


Denmark – Facts & Figures

- 5.5million
- 407 islands, 7314 km of coastline
- GDP – 275 BN USD – Services – 71%
- Per Capita - \$50000
- Annual growth rate – flat
- 4% unemployment
- Member of UN, EU, Schengen, WTO



Production by Economic Sectors



- Agriculture
- Public Service
- Finance, Business Services
- Industry
- Building and Construction
- Trade, Hotel, Catering, Transport etc.



DANISH EXPORTS

- Total Exports - \$ 100 Billion
- Total Imports - \$ 100 Billion
- Main Exports
 - Manufactured Goods – 65%
 - Agricultural Products – 14%
 - Energy & Products – 5%
 - Others – 16%
- Germany is Denmark's biggest trading partner



- Denmark has the world's best business environment 2007 – 2011 (EIU 2007)
- Denmark is the most flexible and liberal labour market in terms of rules for hiring and firing in continental Europe (IMD 2006)
- Denmark is number 1 in the world on E-readiness (The Economist & IBM, 2007)
- Denmark is the world's most network ready nation (The World Economic Forum, Network Readiness Index 2006-2007)

DANISH ICT STRENGTHS &



- Entrepreneurial and innovative
- Global ownership (successes are sold)
- Strong domain knowledge on usage: logistics, finance, public administration, food, health, telecom, defence
- Strong tradition for going global...think Skype



FAMOUS BRAINS – FAMOUS DANES

DID YOU KNOW THAT:

- Denmark has set heavy footprints in global object oriented software development
- That C++ was developed by a Dane?
- That C# was co-developed by a Dane?
- That PHP, JAVA 5 and many others languages were influenced by Danes?
- That usability in software and participatory software design are Danish development areas?
- That Microsoft have their largest development center in Europe located in Denmark?



SOFTWARE STRONGHOLDS

BUSINESS SOFTWARE

ACOUSTICS



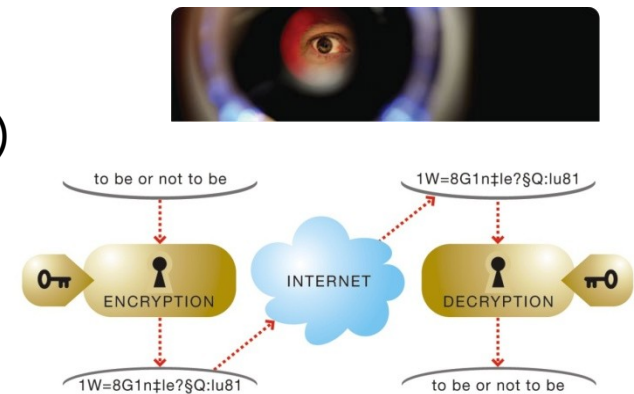
SECURITY

E-GOVERNMENT



SECURITY

- Aarhus University (AU)
 - Department of Computer Science
 - Public-key Encryption
 - Cryptographic Protocols
 - Quantum Cryptography
- The Technical University of Denmark (DTU)
 - The Cryptology and Coding Group
 - Encryption
 - Hashing
 - Message Authentication



Reference Companies in Denmark

Steria – Siemens – FormularData – Microsoft – Logica – Cardlab – Birkegaarden – Scanaware – Systematic – Cryptico – IBM Denmark – Quard Technology – Guardia



ACOUSTICS

Hearing aids - Test Equipment – 3D Audio - High Fidelity – He

- Aalborg University (AAU)

The department of Electronic Systems





E-GOVERNMENT

E-invoicing, taxation, digital signature, e-government university, e-books

- Aalborg University (AAU)
- Aarhus University (AU)
- Copenhagen Business School (CBS)
- IT-University of Copenhagen (ITU)
- Roskilde University (ROS)
- University of Copenhagen (KU)
- University of Southern Denmark (SDU)



Reference Companies in Denmark

KMD – CSC – IBM – Resultmaker – IT Practice –
Rambøl – NNIT – Devoteam Fischer Lorenz – CareCom – CapGemini Ciber System
Integration – CSC Scandihealth – Eblanket – Fujitsu – Hewlett Packard – Informi GIS

Key2Know – KPMG – Medialogic – Mjølnir Informatics – Scanjour – Scriptor
Technology

Software Innovation – SAP Denmark – Targit – Logica – Unisys



BUSINESS SOFTWARE

Vertical and horizontal application on top of SAP, Oracle, Citrix, Novell and

Microsoft Business Solutions

- Aalborg University (AAU)
- Aarhus University (AU)
- IT-University of Copenhagen (ITU)
- University of Copenhagen (KU)
- University of Southern Denmark (SDU)



Reference Companies in Denmark

Targetit – Logica – Celenia – Cornator – Handstep – Navipartner - Logimatic - Thy Data –
MW

Data – Microsoft – NNIT – EDB Gruppen – Oracle Denmark – Maconomy – SAP Denmark
– Fujitsu Services – Lawson Software – IBS Denmark – Spring Consulting – Bording Data



SIEMENS





Denmark & India go back a long way

- Danish trading post established in 1620 in Tarangambadi – near Pondicherry
- DANIDA active in India for decades
- Prakash Padukone has a strong danish connection



INDO DANISH TRADE

USD 1 Billion

Exports – 55% Imports – 45%

Main Exports

Apparel/Ready made garments – 45%

Commodities – 20%

Main Imports

Pharmaceutical products

Power machinery and motors



Industries Attracting Denmark to India

- **Infrastructure**
 - Equipments
 - Consultancy
 - Project Management
- **Building and Construction**
 - Equipments
 - Projects
- **Metal & Machinery Industry**
 - Selling (Equipments, Systems)
 - Sourcing (Components, Metal Parts)
 - Engineering Services

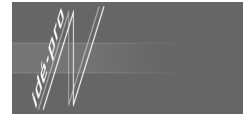


Industries Attracting Denmark to India

- ICT – Outsourcing IT development
- Hiring India Engineers and Doctors
 - Opportunities in Knowledge Jobs
- Renewable Energy
 - System Manufacturers
 - Component Manufacturers
 - Selling and sourcing
- Other Areas for Equipment & Component manufacturers

INVEST IN DENMARK

MINISTRY OF FOREIGN AFFAIRS OF DENMARK



ProCon Solution

DISA



DANISH STEEL CLUSTER (P) LIMITED.

frontAvenue



LM Glasfiber



MIGATRONIC

ROULUNDS



ifu





OPPORTUNITIES FOR INDIAN COMPANIES

- **IT SERVICES & PRODUCTS**
 - SAP
 - APPLICATION MAINTENANCE & DEVPT.
 - WEB DESIGN AND MAINTENANCE
 - DESIGN & DEVELOPMENT
- **LIFE SCIENCES**
 - Collaborative Drug Discovery
 - Acquisition
 - Regional Headquarter



OPPORTUNITIES FOR INDIAN COMPANIES

- Renewable Energy
 - Wind Energy R&D
 - Bio Fuels
 - Electric Cars & Battery R&D
- HUB
 - Northern European Hq
 - Northern European Distribution Hub



DENMARK, YOUR NORDIC HUB

- Centrally located
- Competitive corporate taxation
- Flexible labour laws
- Easy to open an office
- Shortage of skilled labour
- Low penetration of Indian ICT companies



Indian Companies in Denmark





GENERAL EXPERIENCE

- Be ready to start small
- Happy with visa and immigration process
- Not as expensive once you start living there
- Everyone speaks English
- Winters challenging
- Clients demanding but do not change vendors once selected
- Seek value for money, demand quality

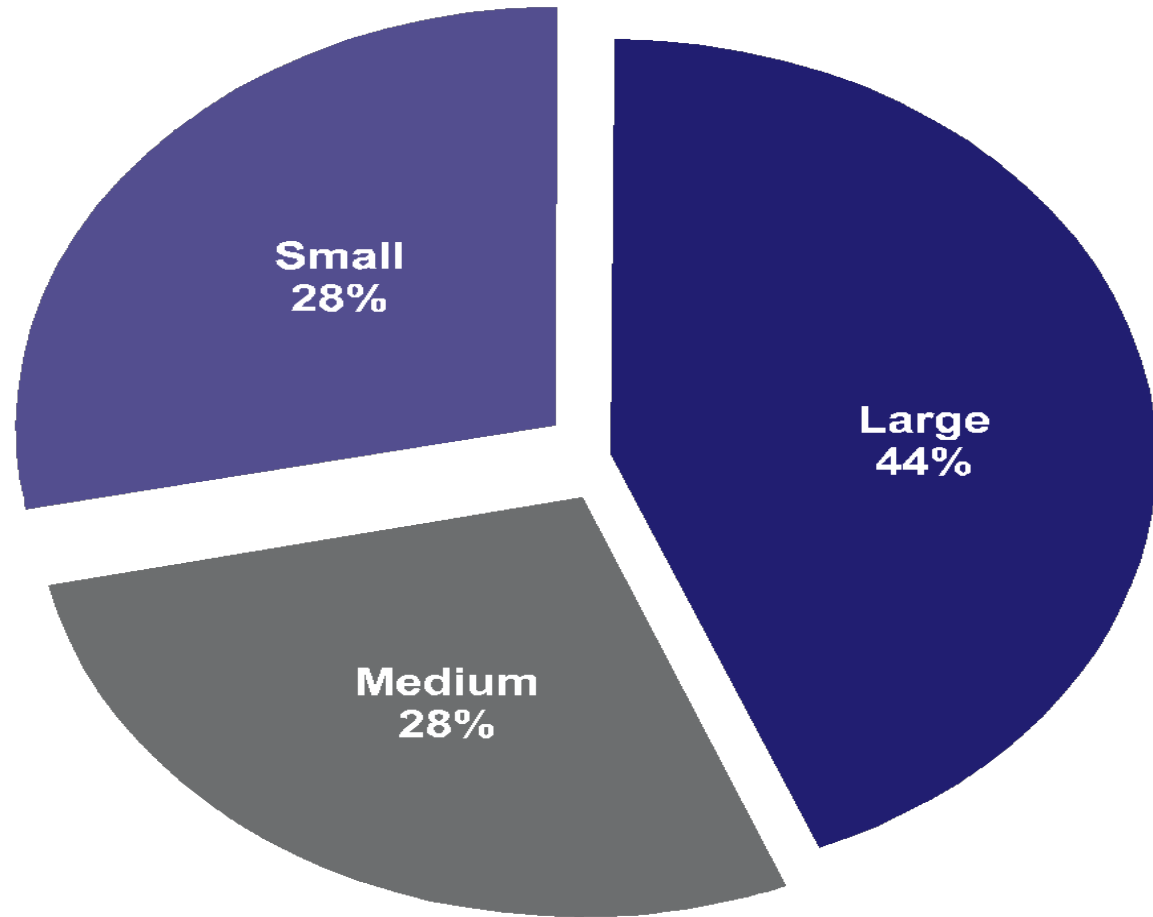


NORDIC ECONOMY

- World's 10th largest economy – 25 Mn.
- Services – 56-73% & Mfrg.- 26-42%
- Fundamentally strong & stable economies
- Export driven & R&D heavy -
- Avg. GDP growth faster than US & Europe
- Impact of economic slowdown seen but bounce back expected to be faster
- Low unemployment
- SME's makes significant contribution



NORDIC INDUSTRY BY REVENUE





ICT SPENDING – NORDICS

- TOTAL – 55 bn \$
 - Hardware – 11 BN
 - Telecom – 6 BN
 - Software Products – 10 BN
 - IT Services – 28 BN
- IT SERVICES
 - Outsourced – 10Bn \$
 - In-house IT Staff – 18 Bn
- OUTSOURCED



IT SERVICES MARKET IN NORDIC

- 10-12% of total European IT services mkt.
- Mature outlook towards IT – high adoption
- 3% of GDP spent on IT – highest in Europe
- Earliest to adopt to new technologies
- 50% spent on IT services – high proportion on products showing maturity
- In-house IT services model preferred, there lies opportunity



OUTSOURCING

- Large companies early adopters
- In-sourcing, complete outsourcing, multi-sourcing some popular models
- 70% of entps have used external suppliers
- Solving capacity problem – key driver – skills shortage
- Local firms compete with global majors



DENMARK IT SPENDING

- 10 BN USD
- PUBLIC SECTOR- 3 BN, most in nordics
 - Outsourcing, devpt, support – 60%
 - Hardware – 23%
 - Software – 17%
 - 5 companies dominate with over 50% incl IBM & CSC
- Assume similar break up for private sector
- Significant opportunity



INDIAN IT COMPANIES REGIONAL REVENUES

2007-08

·Denmark	USD 105 Mn
·Finland	USD 227 Mn
·Iceland	USD 6 Mn
·Norway	USD 41 Mn
·Sweden	USD 118 Mn
· Total	USD 500 Mn



Current projects from India – all opening Nordic/regional headquarters

- Small company with 40 persons providing digital archiving services –
- Small company from Pune providing back office support to large accounting firm
- Mid sized IT company looking to set up Nordic HQ – leveraging on 2 clients they have
- Mid sized IT company with revenues of 100 MN USD, recently IPO – servicing danish telecom client along with partner



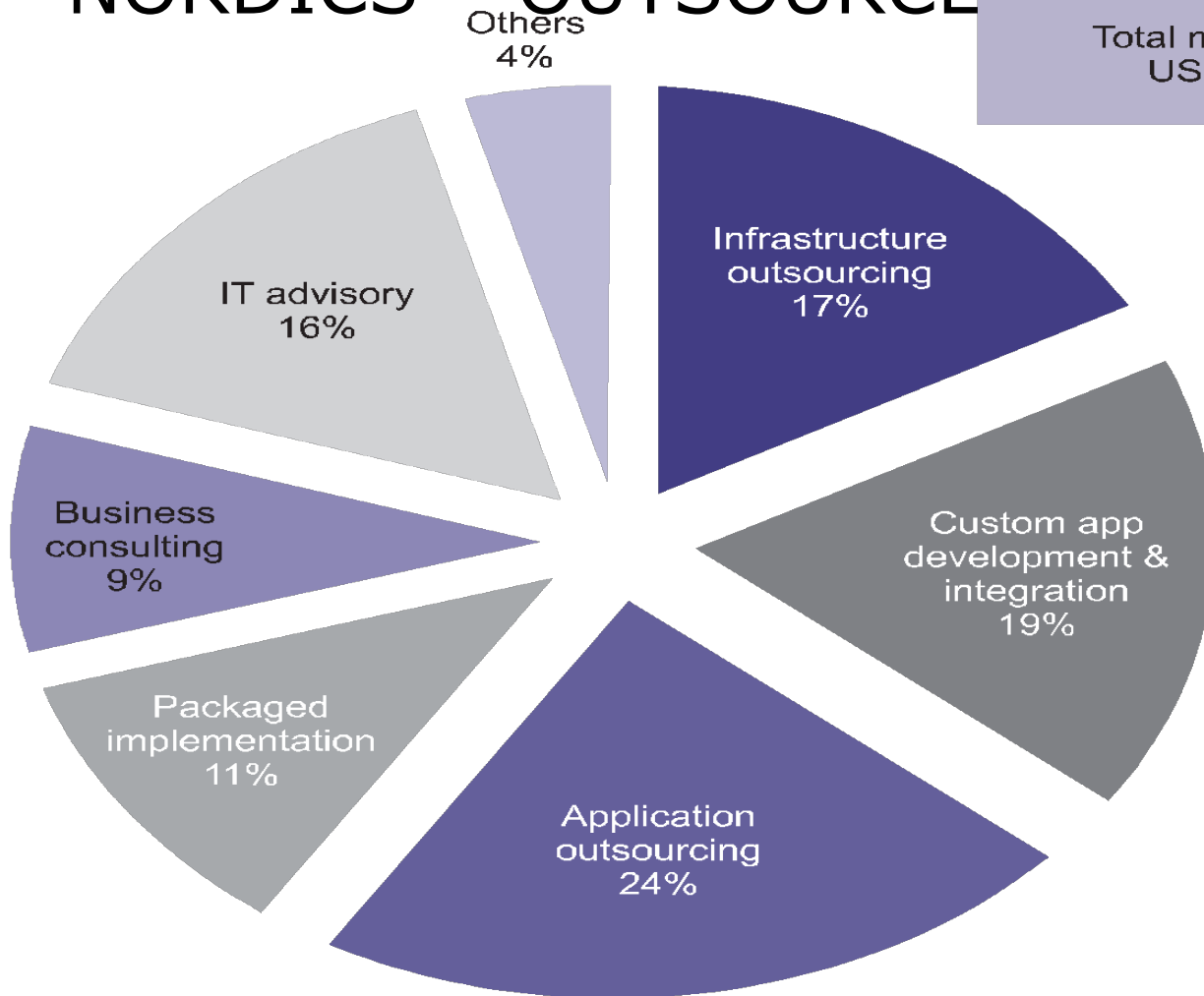
SECTORS TO TARGET

- Manufacturing
- Telecom
- Public Sector
 - E-government
 - Healthcare
- Banking and Financial Services
- Denmark
 - Shipping & Logistics
 - Acoustics



NORDICS – OUTSOURCED SERVICES

Total market size:
USD 10 Bn





INVEST IN DENMARK BUSINESS SERVICES

- Information and analysis
- Contact potential partners, official authorities, etc.
- Arrange fact-finding missions
- Practical aid when setting up business
- Aftersales services
- Free of charge and with full confidentiality
- www.investindk.com



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