
Life & Pension BPO Competitive Overview

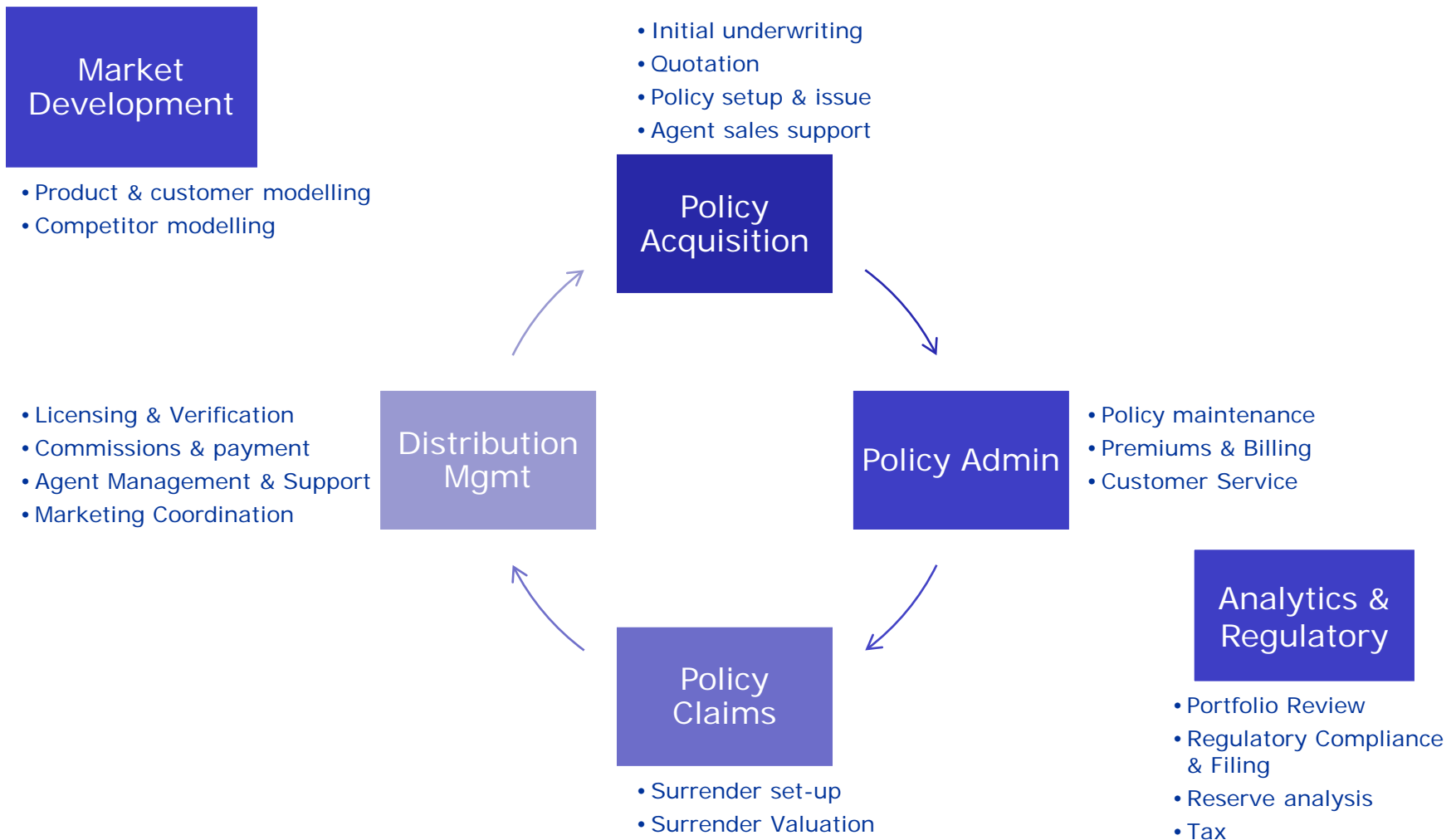
Charles Juniper

Insurance Sector Analyst

NelsonHall

28th October 2010

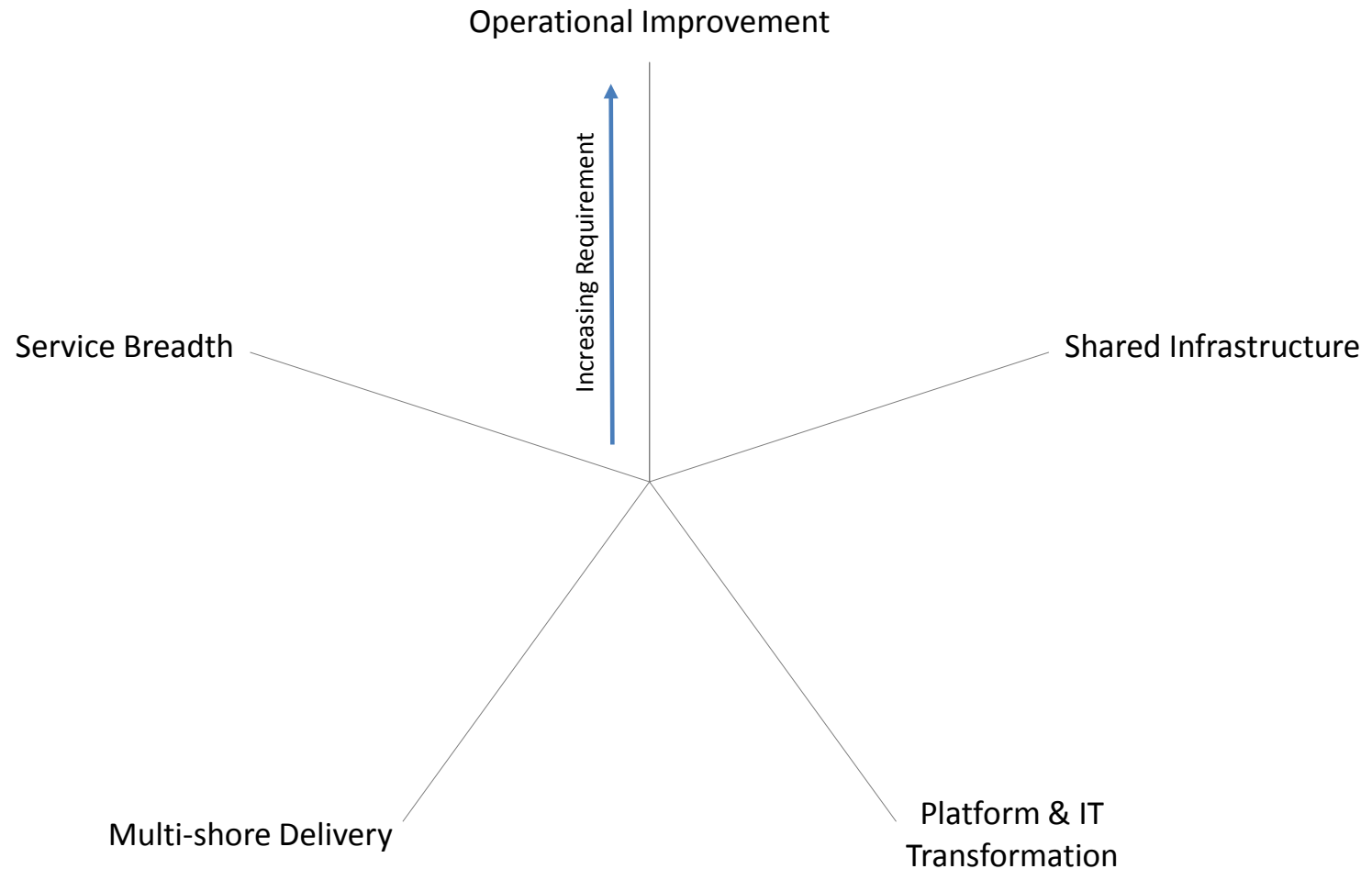
Life insurance BPO encompasses a wide range of activities...



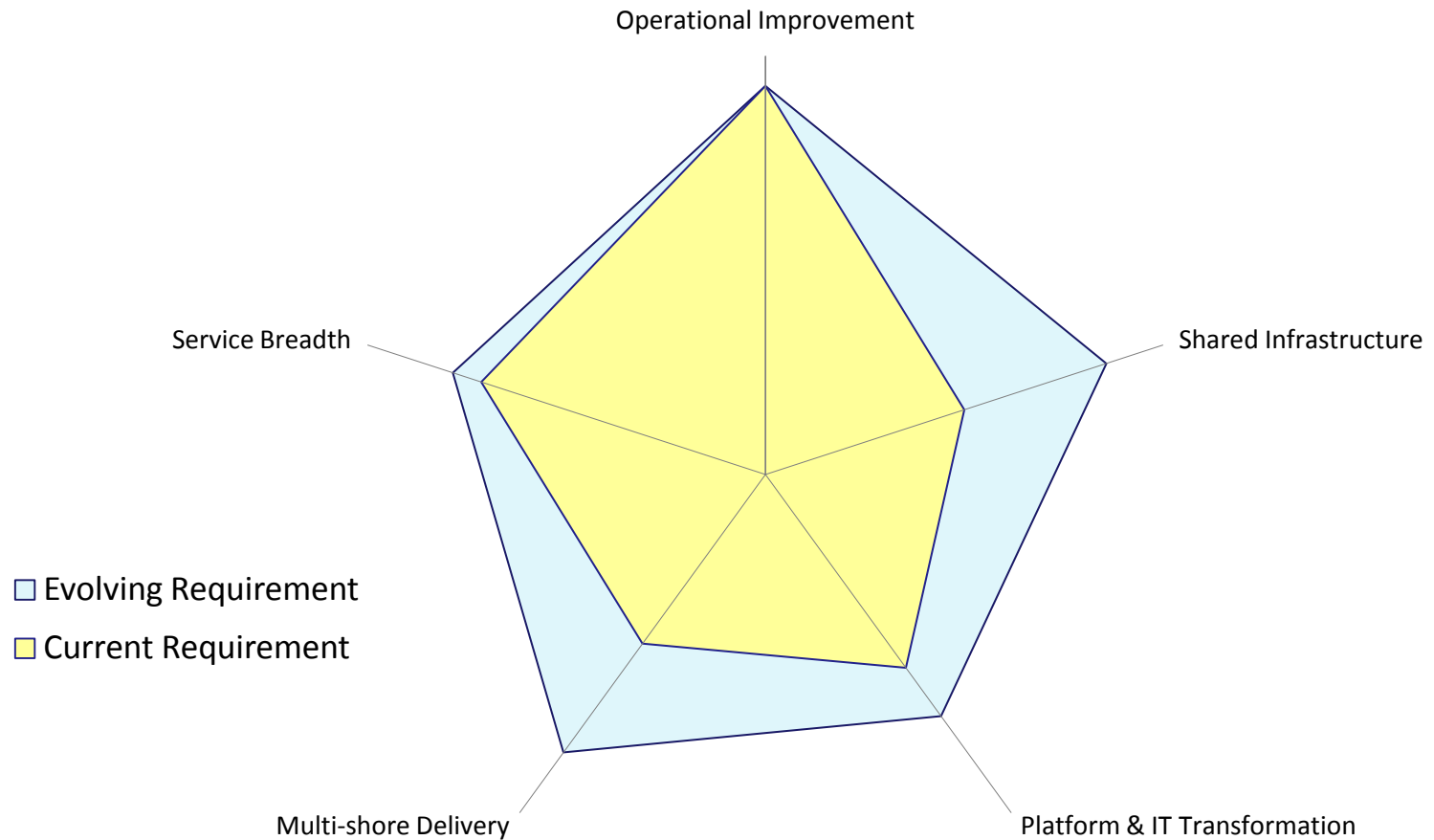
Two Distinct Set of Providers in Each Major Regional Market

Vendor	UK Ranking	Global Ranking	Vendor	US Ranking	Global Ranking
Capita	1	1	CSC	1	2
Diligenta	2	3	IBM	2	4
HCL	3	5	Dell Perot	3	6
Vertex	4	11	Genpact	4	7
			Infosys McCamish	5	8
			Patni	6	9
			EXL Service	6	9

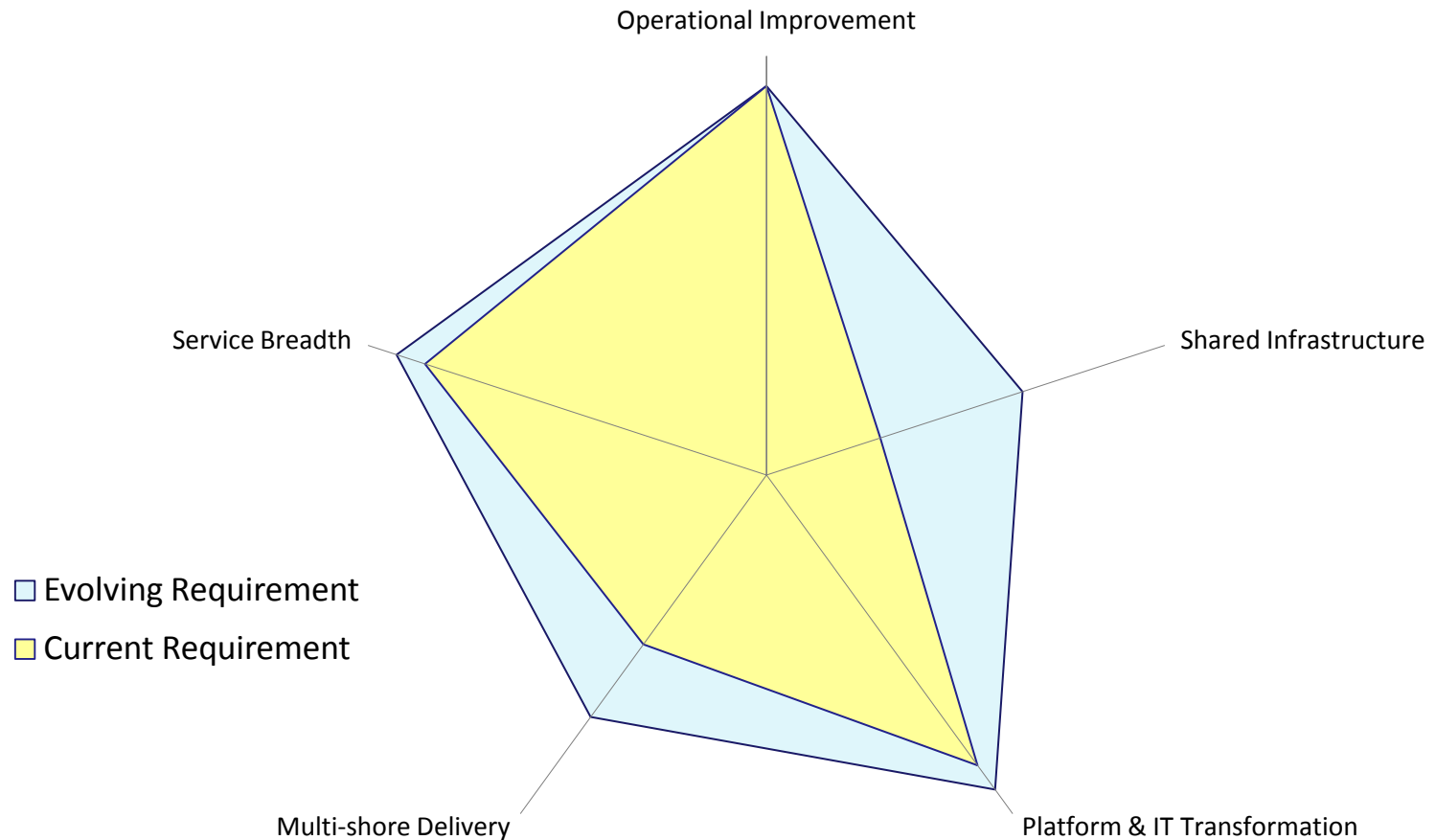
Client Requirements Can Be Mapped to Five Key Dimensions



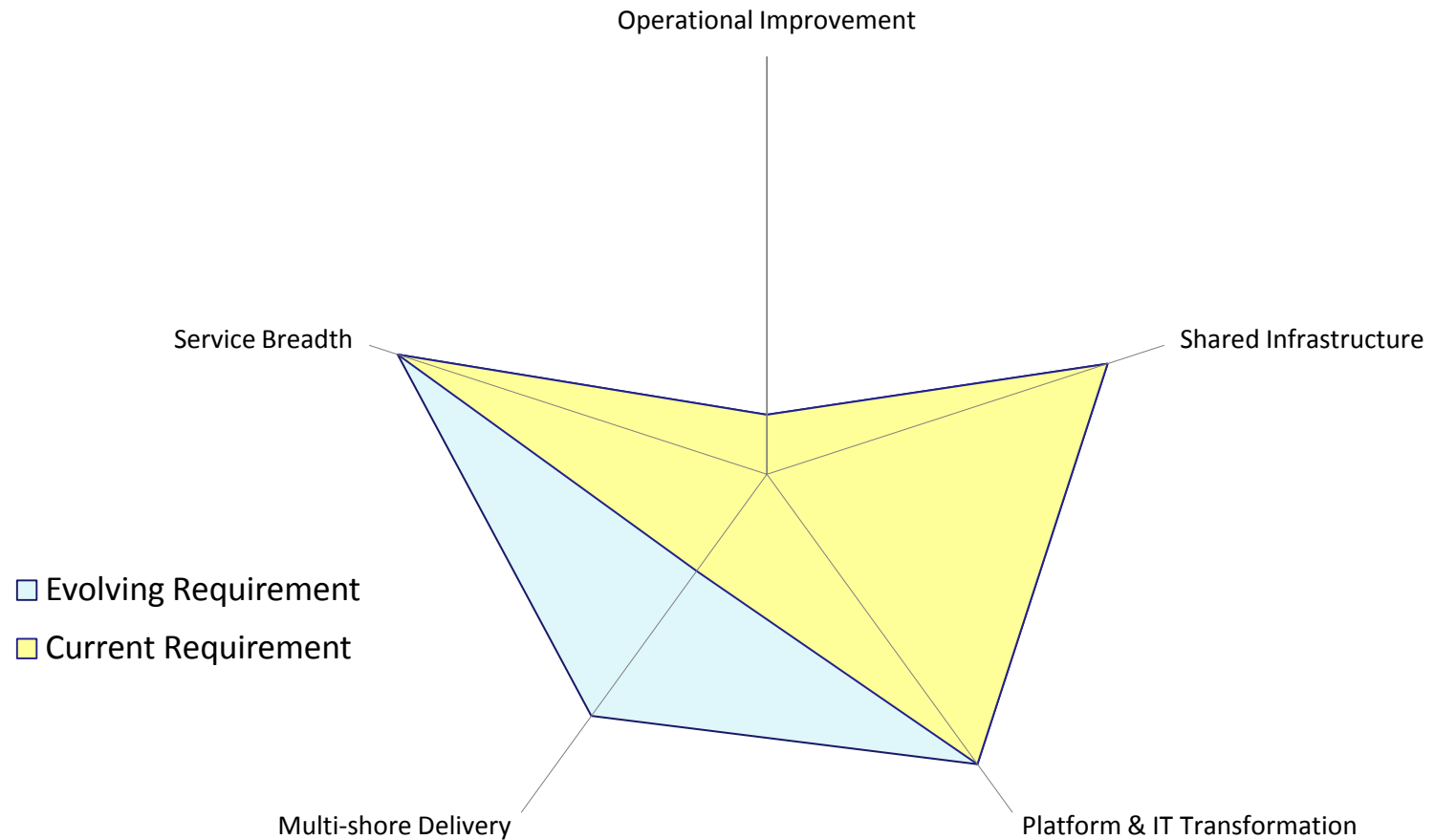
UK Cost Focused Policy Administration Segment



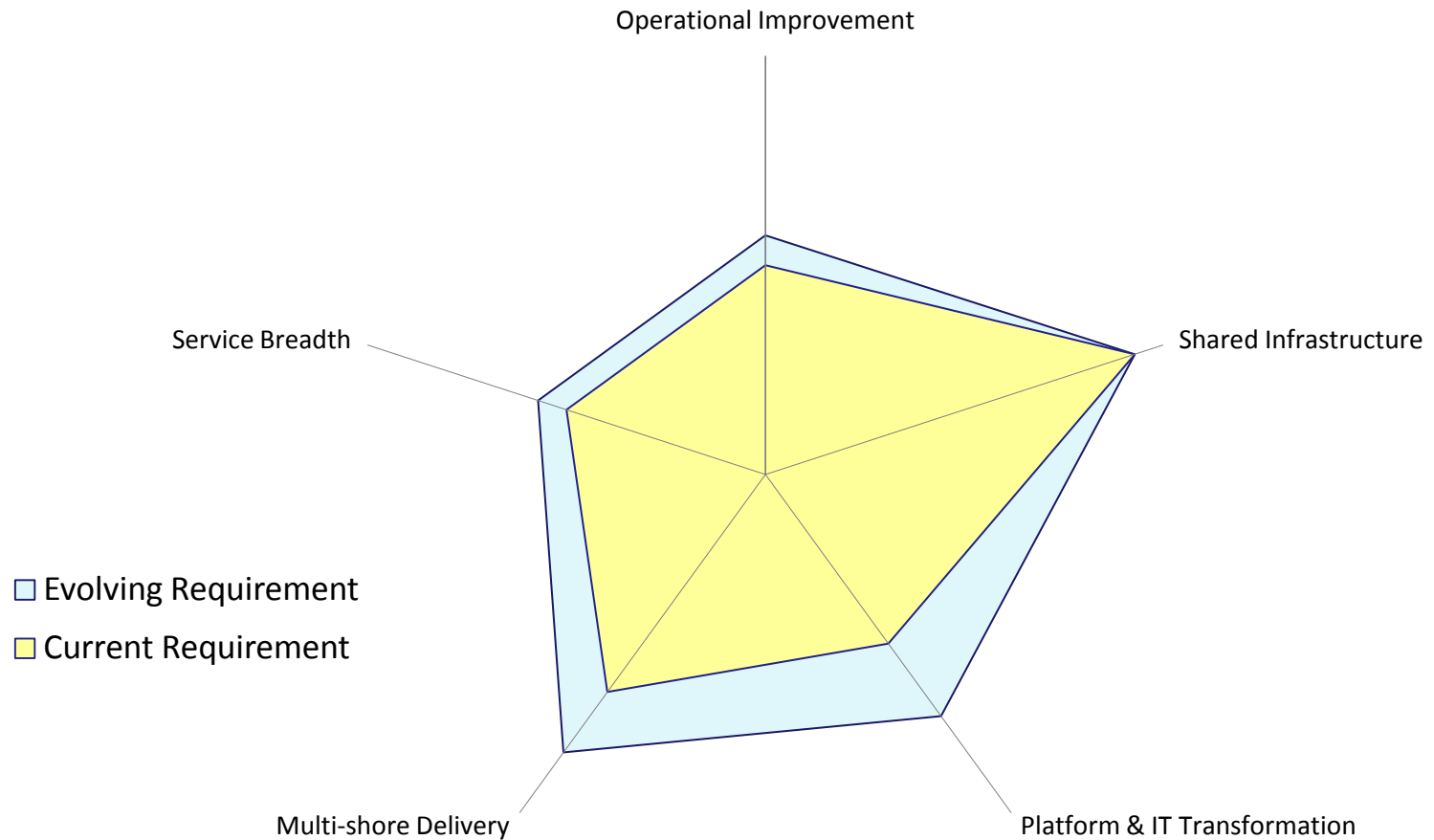
UK Service Focused Policy Administration Segment



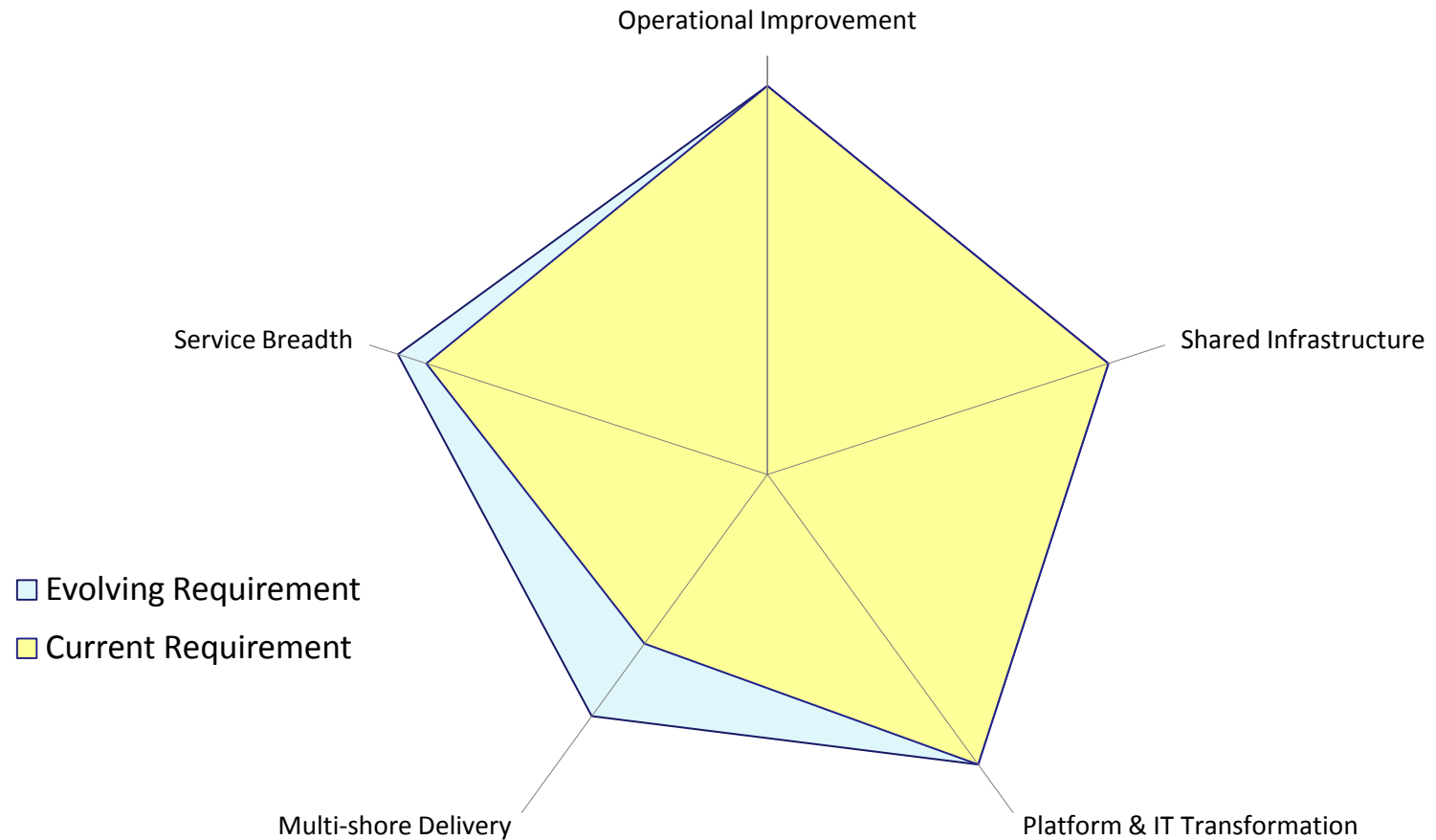
UK Existing Market Expansion Segment



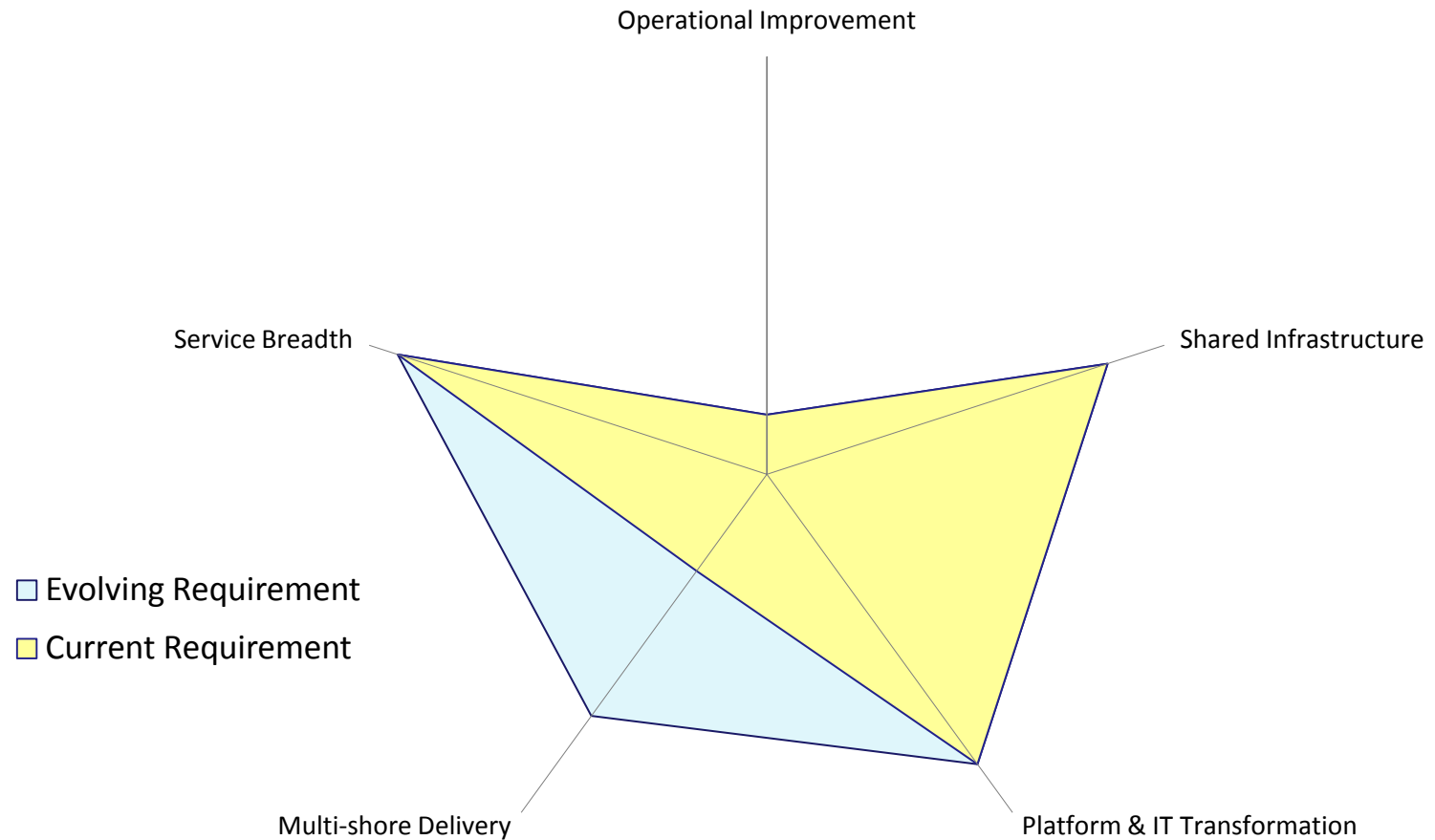
US Cost Focused Policy Administration Segment



US Service Focused Policy Administration Segment



US Existing Market Expansion Segment



Developing Markets

- Widely differing markets
 - Highest levels of interest in India, Japan, Australia, Brazil, Singapore, South Korea
 - China is a long-term game
- Potential clients types:
 - Managing growth amongst domestic life insurers
 - European and US-based insurers building presence in new markets
 - Geographic expansion of regional life insurers
- No clear winners, but early wins
 - IBM (Mitsui Life, SulAmerica)
 - TCS, Genpact, Firstsource

Thank You & Questions

Charles Juniper

Insurance Sector Analyst

NelsonHall

28th October 2010
