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2011 Conference Program



FITT'S 14TH NATIONAL CONFERENCE



The Road to Trade Success June 7–8, 2011 | Gatineau, QC

10:45 - 11:45 Concurrent Panel Sessions

► Canada, India, & the Middle East—The Opportunity Triangle

Sponsored by: Edwards School of Business, University of Saskatchewan



Hanlon Centre for International Business Studies

A perspective on how these three markets are uniquely placed to mutually benefit from each market's needs.

The speaker, an India expert and a Middle East consultant shares his in-depth understanding of the key sectors in India and the MENA Region that hold great promise for Canadian businesses, SMEs' and entrepreneurs. Listen to his rationale on what makes for a one-of-a-kind Opportunity Triangle, where entry into one market indeed opens out the opportunity to tap the others as well. Rmagine, in its advisory role as an India & Middle East Consultancy, has crafted the market entry strategy for many Canadian businesses—so join us and learn the key steps that you need to take, before you go.

Speaker: Alex Alagappan, Partner, Chief Big Rain, Rmagine Strategic Consultancy



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Speaker Profiles



FITT'S 14TH NATIONAL CONFERENCE

The Road to Trade Success
June 7–8, 2011 | Gatineau, QC



Alex Alagappan, Partner, Chief Big Rain, Rmagine Strategic Consultancy

Alex's role as Chief Big Rain is a light-hearted take on what he does—
acting as opportunity catalyst for Canadian and US businesses to
venture into global markets like India and the Middle East. Canadian
SMEs' and entrepreneurs have used Alex's expertise to conduct
market research, market analysis, competitor mapping and draft market
entry strategies, apart from getting those crucial, potential-partner
introductions that are critical to any global venture. Apart from
managing Rmagine, he is also a Roster Management Consultant for the Business
Development Bank of Canada (BDC), for BDC's clients.

As the Founder Partner of Rmagine, Alex Alagappan is an India & Middle East Expert and Consultant. His expertise comes from his tenure in global marketing service organizations like BBDO, Grey Worldwide and Ogilvy, in these markets. As the Director of Strategic Planning and as Director of New Business at BBDO, Grey & Ogilvy he has worked with global, best of breed clients like Procter & Gamble, General Electric, Cadbury's, Philips, Mars, Mercedes, PepsiCo, HP, Honda, EDS, Barclays, Unilever, J&J, Gillette and many more. As a consequence, he has a unique, international, multi-sector perspective on what makes successful marketing.

He is also a Speaker and Expert Faculty on subjects like Going Global, Emerging Markets, International Marketing and Market Research, Opportunities in the GCC, The India Opportunity at seminars conducted by the Canadian Exporters & Manufacturers (CME), BDC and the Indo Canada Chamber of Commerce (ICCC). He is also an active blogger on these subjects on the Rmagine Blog and a guest writer for Business without Borders.







The Opportunity Triangle

Canada-India-Middle East

A presentation at the FITT National Conference 2011 by Alex Alagappan, Founder Partner, Rmagine



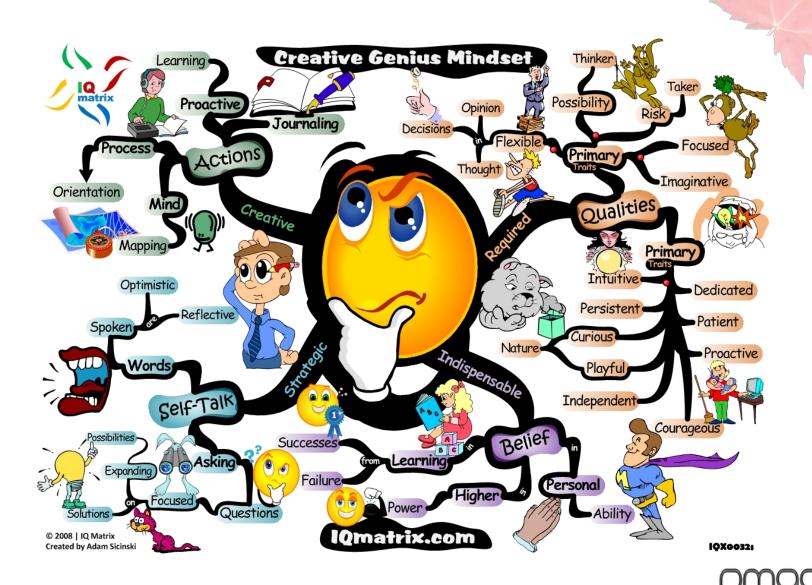


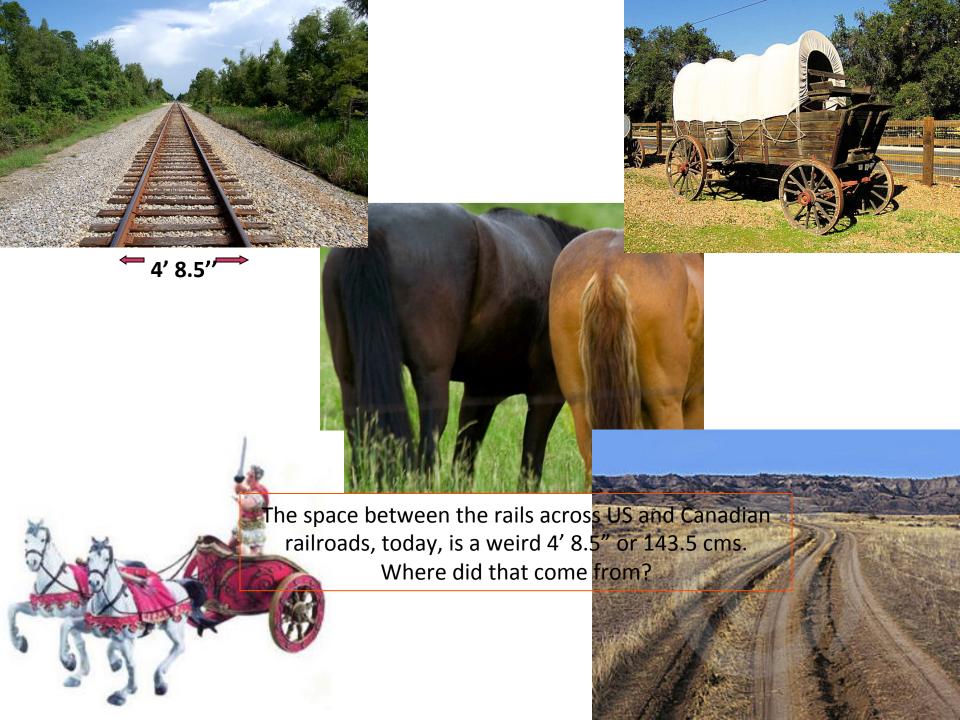


Markets, Marketing, Mindset-Reimagined

We will begin with "Mindset"







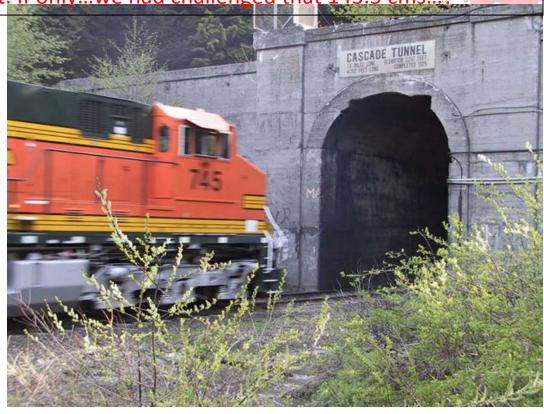
143.5 cms?

- That came from the English who built the first railroad with that width, which actually came from their tramways, having the same width. Where did that come from?
- From the wagons that were driven in the old days. The width of the wheels were the same and the same jigs and tools were used for the tramways. But why did the wagon wheels have that width?
- Because if they did not, the wheels would break in the ruts that were there in olden day long distance roads in medieval Europe. And where did the ruts come from?
- From Roman chariots, two thousand years back as they crisscrossed Europe. And they were built with that width to accommodate, very simply, two horses' backsides.



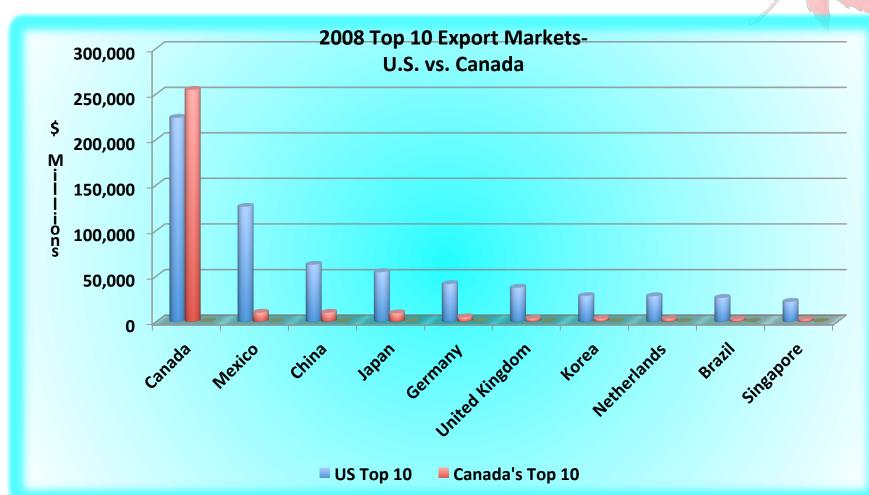
Fast forward today's space age and space shuttles. The two booster rockets are built in Utah. The engineers would have loved to build it bigger. But no. The trains carrying them to the launch site can't take a wider payload, considering the tunnels that they had to pass through, whose width of course was based on 143.5 cms. Going to prove how we are all creatures of habit. If only...we had challenged that 143.5 cms...?



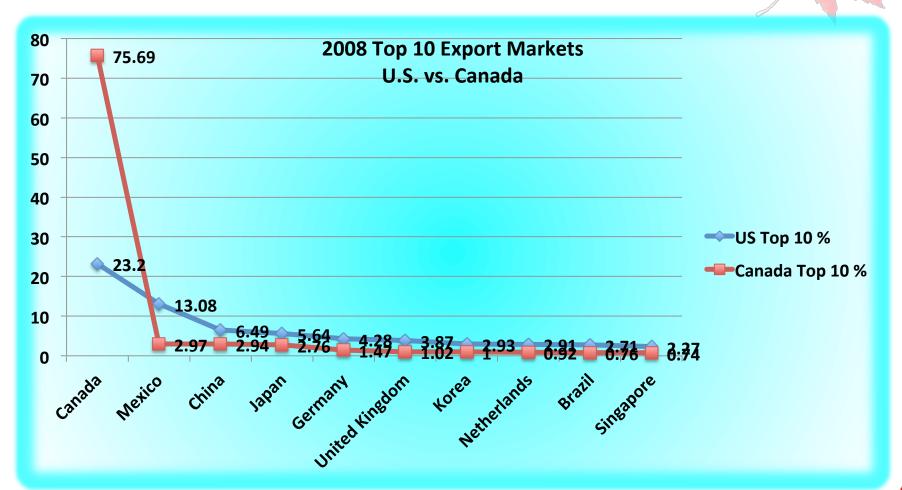


Business needs to shed its mental shackles and change its mindset about global business and newer, faster growing emerging markets

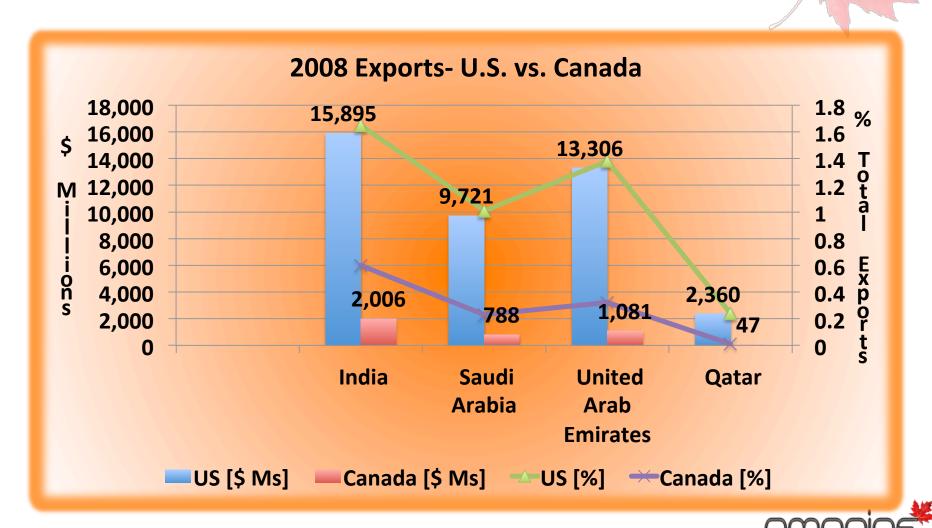






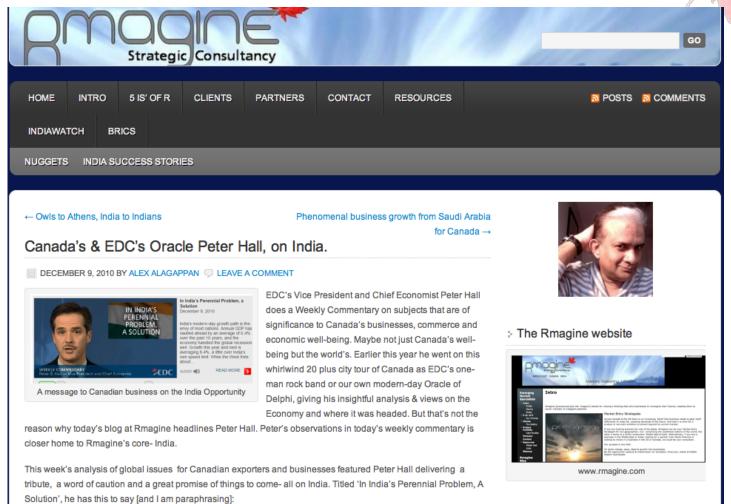




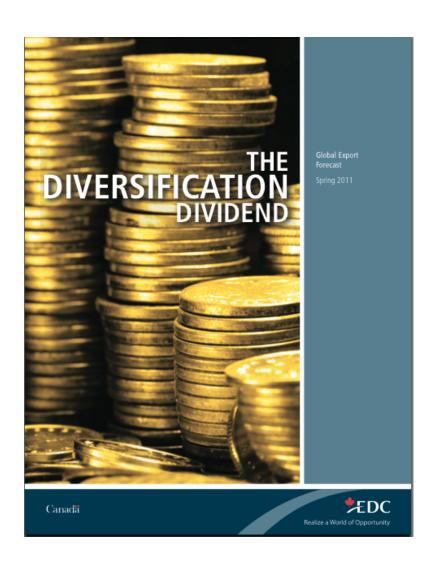


- Our global export: not so global. Huge imbalance
- Canada's 76% reliance on the US Market > The Top 10 US export markets put together at 67%
- Key markets in question: India and the GCC countries. Scope for trebling or quadrupling value of trade
- Our Mission: Need for a change in mindset: diversity, the single big mission for Canadian business









- "Recession amputated about a quarter of Canada's exports to the world"
- "Faced with a desperate situation, exporters got creative – and engaged in something we've only been talking about for generations"
- "In a word, diversification"



- "Canadian exporters are diversifying into nontraditional markets, with sales to places like the BRIC countries, the UAE, Indonesia, Mexico and a lot of others"
- "In contrast to OECD performance, sales to emerging markets between 2001 and 2008 clocked in at over 12% annually"
- "If trends persist, by 2016, emerging markets will account for 20% of total merchandise exports, and almost 30% by 2020. The natural shift in trade shares over this brief time are enough to double total annual export growth"



- The Optimist in EDC reflects what we spoke of: trebling & quadrupling
- "Then suppose Canada makes a special effort to expand sales in emerging markets – enough to nudge annual growth up by 3% more a year. Assuming that growth to developed markets doesn't change, emerging markets would account for 50% of Canada's total merchandise trade by 2025. Annual export growth would be 3.5 times the current pace"





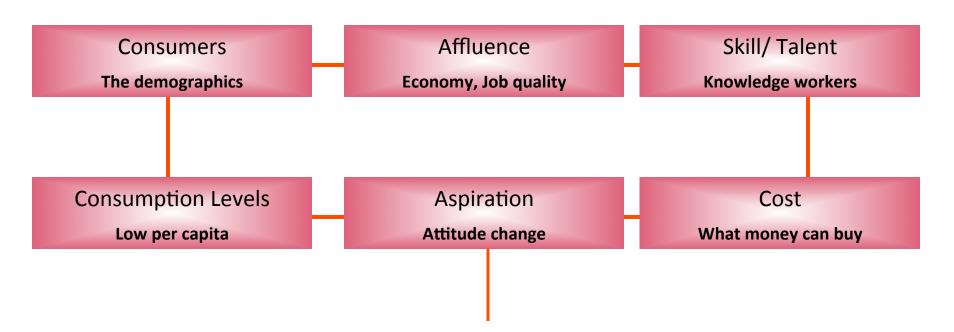
Why India





The India Opportunity, defined

From Emerging to Surging India







65%< 35Y 60%- wkg age 42 cities> 1MM pop MI- 400MM Affluent- 24MM

From Emerging \

ging India

Surge till 2050 English, Smart, Work ethic Knowledge Workers

Consumers

The demographics

Affluence

Economy, Job quality

Skill/ Talent

Knowledge workers

Consumption Levels

Low per capita

Aspiration

Attitude change

Cost

What money can buy

Half full? Half empty?

[Double]
Double digit
growths

Raw material Labor R&D, m/c- LOW

India: Canada's second "home market"

Threefold Potential

- Export & tap the market- Trade
- Expand & tap the market- Invest
- The Opportunity Triangle: from India tap the opportunity called the GCC
 - Trade with competitive advantage
 - Partner with Indian companies to set up satellite operations





Why Middle East



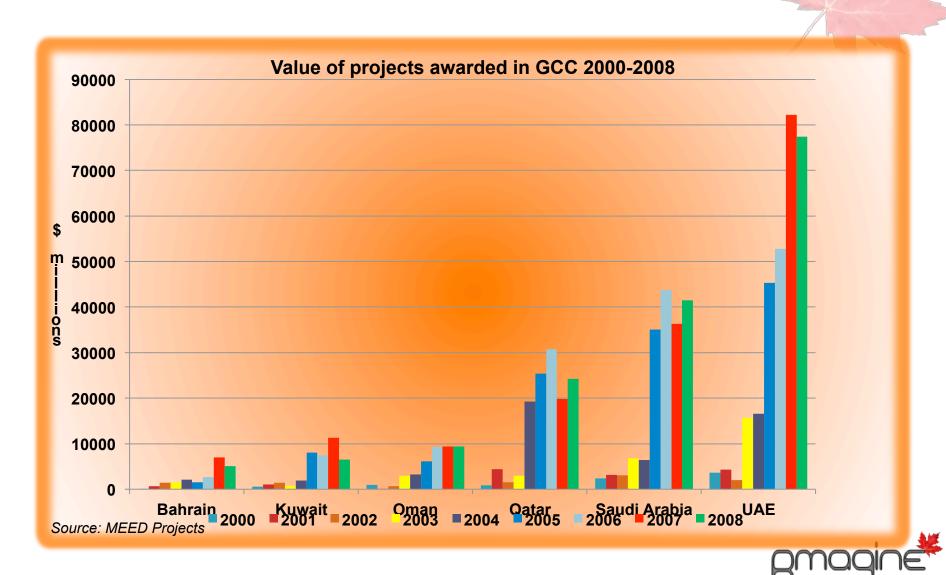


The Middle East, redefined

- Gulf Cooperation Council [GCC], the low hanging fruit
- UAE [within that, Abu Dhabi], Saudi Arabia & Qatar- the core of the opportunity
- Kuwait, Bahrain, Oman- the satellite opportunity
- Dubai- still the hub for the Region
- Cumulative total of \$720bn spent on capital projects, 2000-2008



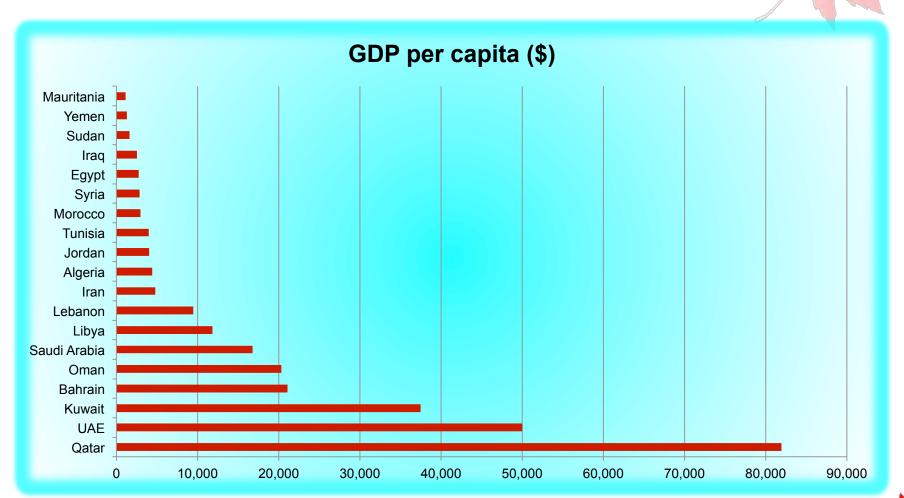
One Source: multi dimensional growth



Per Capita Income- Gapminder Chart



Per capita Income: the disparity Now & 2020





GCC: Still the Region's Engine in 2020



Four growth Factors:

- Oil and gas
- Economic diversification
- Population growth
- Globalization
- \$1 trillion economy in 2010 rising to \$2 trillion by 2020

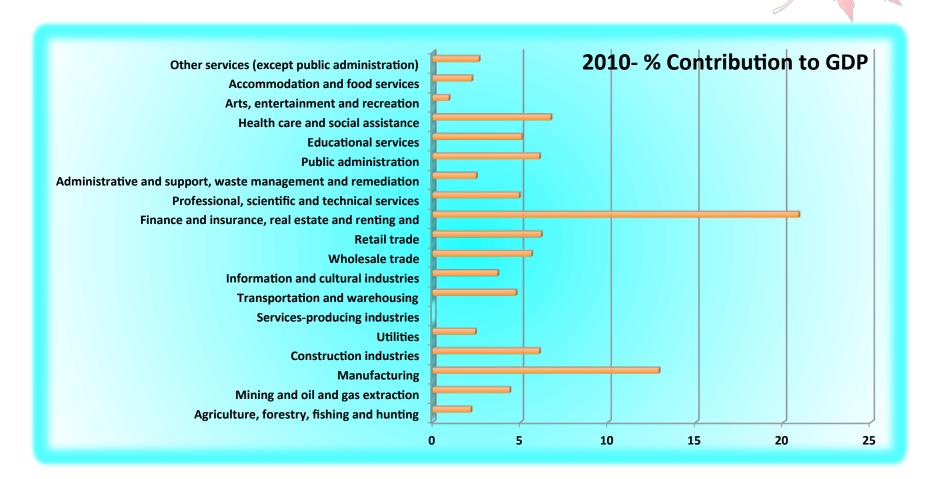




Canada & India



Canada- Sectorwise Contribution





Export Forecast Overview	CAD bn 2010	% Share of Total Exports 2010	Export 2010	t Outlook (% 2011 (f)	Growth) 2012 (f)
Agri-food	39.2	8.9	1.3	15	5
Energy	94.0	21.3	15.3	17	7
Forestry	26.8	6.1	9.7	9	13
Chemical and Plastics	32.4	7.4	5.6	9	6
Fertilizers	6.7	1.5	27.7	26	13
Metals, Ores and Other Industrial Products	62.2	14.1	28.1	24	2
Aircraft and Parts	10.2	2.3	-10.1	0	23
Advanced Technology	14.2	3.2	-7.4	6	6
Industrial Machinery and Equip.	24.0	5.4	-4.8	9	8
Motor Vehicles and Parts	52.5	11.9	32.0	14	15
Consumer Goods	7.6	1.7	-0.1	4	5
Special Transactions*	3.7	8.0	-42.0	2	10
Total Goods Sector	373.3	84.8	11.6	14	8
Total Service Sector	70.1	15.2	4.4	2	4
Total Exports	443.4	100.0	10.4	12	7
Memorandum					
Total Volumes		100.0	9.0	6	6
Total Goods Nominal (excl. Energy)	279.3	63.4	10.4	14	8
Total Goods Nominal (excl. Autos and Energy)	226.8	51.5	6.4	14	7

Source: EDC Economics, 2010 is actual data while 2011 and 2012 are forecast. Special transactions* mainly low-valued transactions, value of repairs to equipment and goods returned to country of origin.





Canada: Sector Strengths

- Mining
- Manufacturing
- Construction
- Agriculture, forestry
- Wholesale & retail
- Information & cultural
- Financial Services
- Healthcare
- Education



Success to those who dare

- Global success not defined by sector performance or size
- Global success defined by individual businesses and their dreams
- "Waiting for the world to come to us is not an option...we have to go out to the world" Joseph P. Repovs, CEO Samco Machinery









30sec Business Ideas

On the India Opportunity



India: The Opportunity Profile

- Quality of the Opportunity
 - Excellence Centre: Research & Eng. Hub
 - The Urban, Upwardly mobile
- Quantum of the Opportunity
 - The breadth of the opportunity
 - The monster size of each opportunity



India: The Research & Eng. Hub

• A research and development (R&D) & engineering hub for many international firms

Auto part makers to enter aircraft component production- in precision eng., machining, lighting, tyre and transmission

2010-11- a
National Clean
Energy Fund
for funding
research and
innovative
projects in
clean energy
technologies

Emerging as an eminent design and engineering destination- design centres, offshoring design tasks

'brand in engineering' amongst (OEMs)

Outsourced global engineering services [ESO] market in 2020. India may capture around 25 per cent, worth around US\$ 40 billion

Potential to capture US\$ 40-45 billion in engineering R&D services by 2020.



India: The Research & Eng. Hub



The unlimited world of DSM

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News

04-Nov-2010 13:15 CET

DSM continues leadership position in Dow Jones Sustainability World Index

02-Nov-2010 07:15 CET

DSM delivers continued strong earnings and cash performance in Q3

02-Nov-2010 07:15 CET

DSM provides 2009 and Q1-Q2 2010 comparative figures

14-Oct-2010 14:15 CET

DSM announces management changes

Highlights

DSM - the Life Sciences and Materials Sciences Company

Royal DSM N.V. creates solutions that nourish, protect and improve performance. Its end markets include human and animal nutrition and health, personal care, pharmaceuticals, automotive, coatings and paint, electrical and electronics, life protection and housing. More ...

Financial results Q3 2010

On 2 November 2010 DSM presented its results for Q3 2010. An archived webcast of the conference call for the media can be accessed here.

DSM Share € 38.28 **^** 1 Dec 2010

Quick links

DSM websites

DSM webshops

Business locator

Location Finder

Annual Report 2009

Sustainability Report 2009

Corporate presentation (PDF:

1.60 Mb)

Services

General archive

E-mail notifications

RSS

PDA

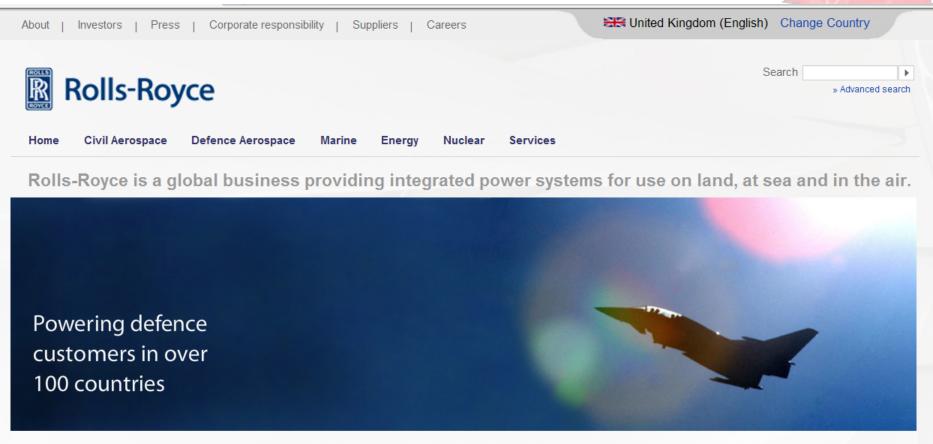
Feedback

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Internet

♠ 125%

India: The Research & Eng. Hub



Investors

GBp 618.50 **1**

Last Trade 1/12/2010 16:49 GMT

» Detailed share price

In the news



- 1 Dec 2010
- * Rolls-Royce wins \$420 million order from Hawaiian Airlines

Quick links

- » Rolls-Royce Marine Investor Briefing 2010 IT
- » Rolls-Royce Group plc 2010 Half-Yearly results presentation
- » 2009 Annual Report of Rolls-Royce Group plc
- » Job opportunities in Nuclear







India: The Research & Eng. Hub

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KONE in brief

Vision and strategy

Values

Management

Organization

History

Toshiba alliance

Suppliers

Development programs

Order material

People Flow Day

People Flow magazine - Issue 32010



Welcome to KONE Corporation

KONE is one of the global leaders in the elevator and escalator industry. The company has been committed to understanding the needs of its customers for the past century, providing industry-leading elevators, escalators and automatic building doors as well as innovative solutions for modernization and maintenance. The company's objective is to offer the best People Flow experience by developing and delivering solutions that enable people to move smoothly, safely, comfortably and without waiting in buildings in an increasingly urbanizing environment. In 2009, KONE had annual net sales of EUR 4.7 billion and approximately 34,000 employees. KONE class B shares are listed on the NASDAQ OMX Helsinki Ltd in Finland. Founded in 1910, KONE celebrates its centennial anniversary in 2010

Read more about us>>





FUNCTION

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KONE 2009 Corporate responsibility report »

LATEST REPORTS

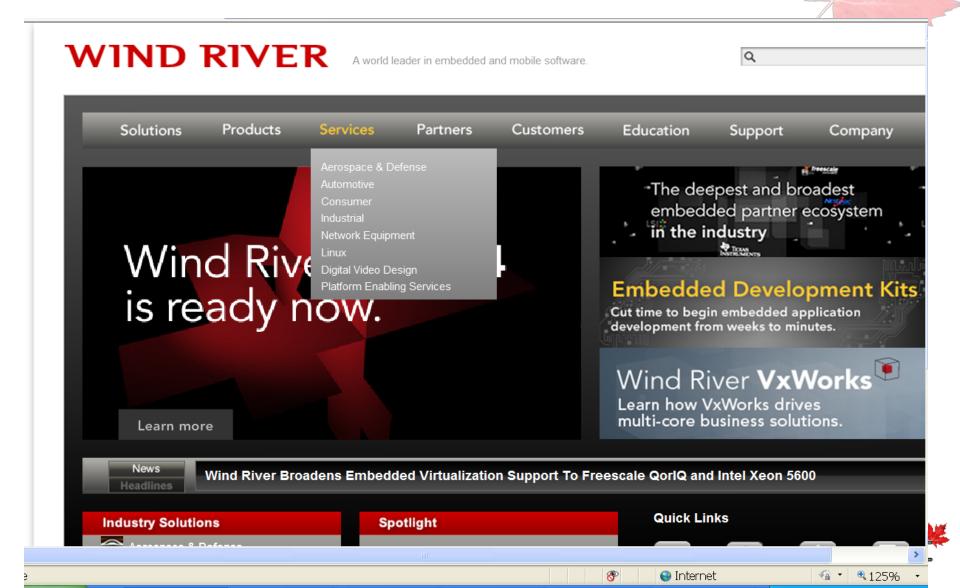
KONE Q3 2010 Interim Report (pdf, 561 KB) »

KONE Q2 2010 Interim Report (pdf, 662 KB) »

KONE Q1 2010 Interim Report (pdf, 687 KB) »

📆 KONE Financial Statements 2009 (pdf, 1 MB) »

India: The Research & Eng. Hub



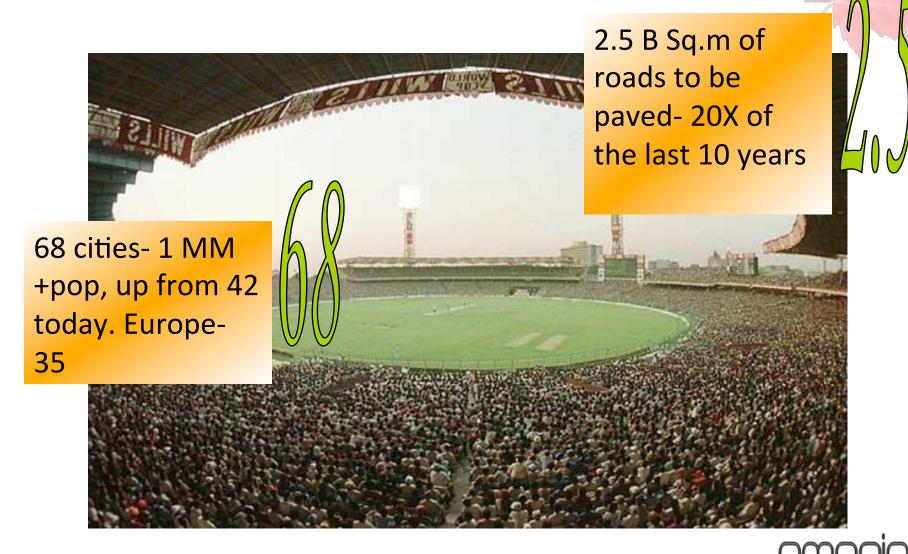


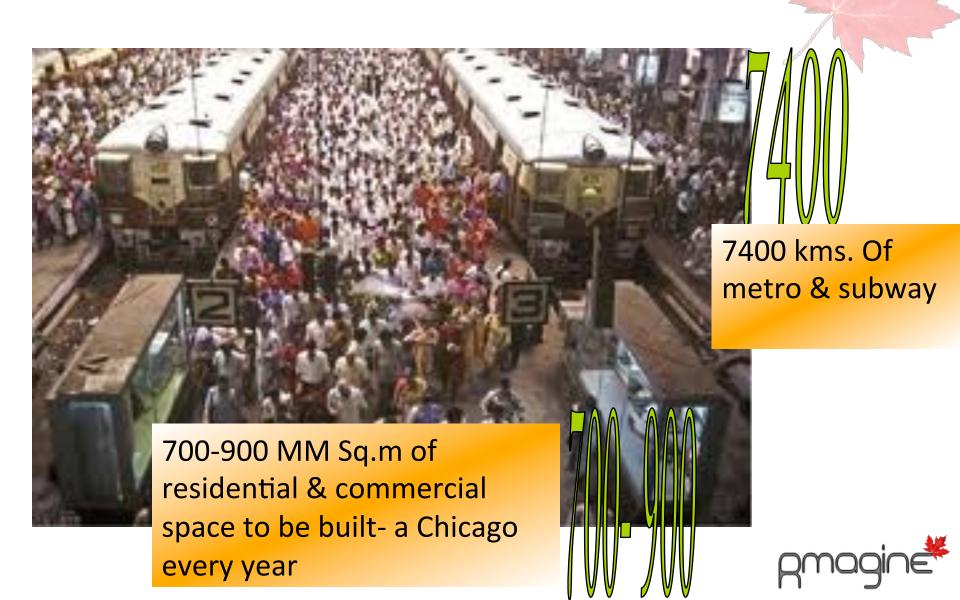
5X GDP

270 MM- net increase in working age pop.

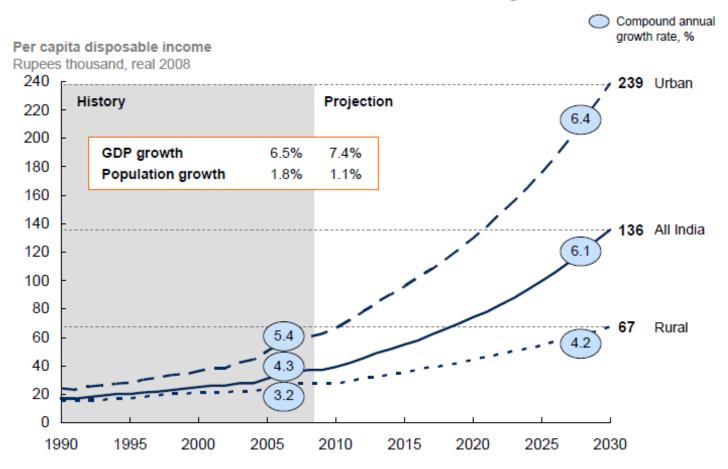








Urban India will drive a near fourfold increase in average national income



SOURCE: India Urbanization Econometric Model; McKinsey Global Institute analysis



30 sec Business Ideas

30 sec BI

- 20 to 40? Indian Origin? Export yourself?
- Mortgage Consultancy
- Professional Real Estate Agency
- Project Management
- Design firms
- Food Franchise
- Indoor Entertainment



So sec Bl

Vending
Machines



Signed: 221MOUs'. \$ 238 B Inv. 2nd largest by 2016



STEEL

Multiplexes: 700 TO 1600 IN

5YRS



RAILWAYS



2nd largest Network. \$ 11 B Inv. in 5 Metros. 4 more in the works

16.3 MM in May '10. 617





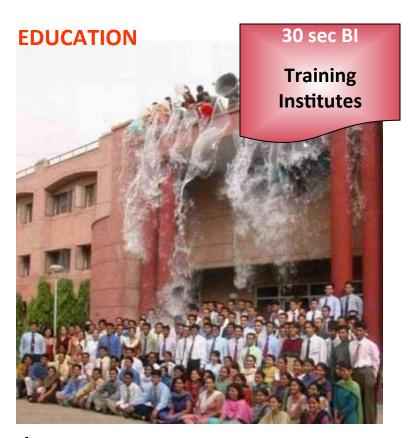


\$110 B in aircraft. \$30 B in infrastructure

\$ 353 B 2010- \$ 543 B by 2014. 55 MM sq.ft. addition







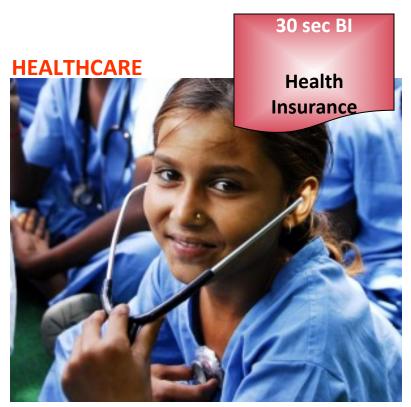
\$100 B Inv. next 5 years

\$ 266 B by 2019;CAGR 2004-09- 16.4%



TOURISM





\$ 35 B to 77 B by 2012; 23%growth per annum

PWC Study- Top Asian mkt in 2010; FDI \$ 2.8 B in 2009-10



REAL ESTATE



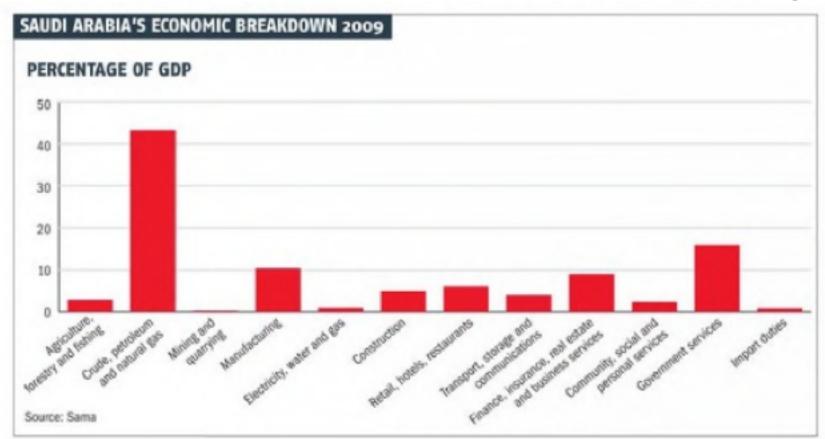


Canada and UAE, Saudi Arabia & Qatar



Saudi Arabia

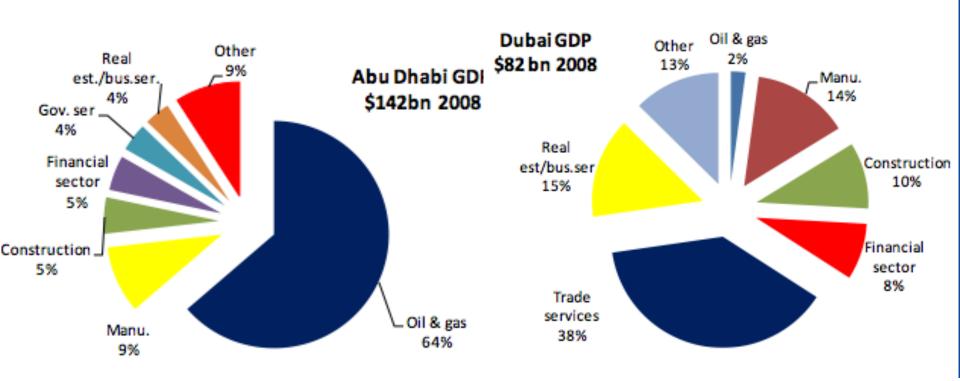






UAE



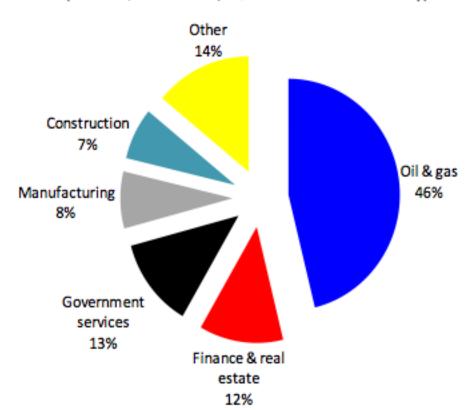




Qatar



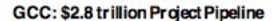
Qatar: 2009 GDP (Total = \$98.3 billion, Qatar Statistics Authority)

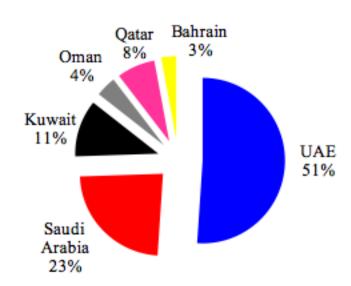


- All three economies certainly diversifying their interests
- Construction,
 Financial Services,
 Manufacturing, Real
 Estate & Trade being
 some of the
 dominant themes

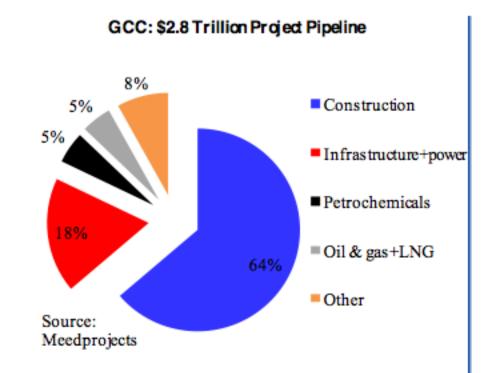


The 2020 Horizon: Project Pipeline





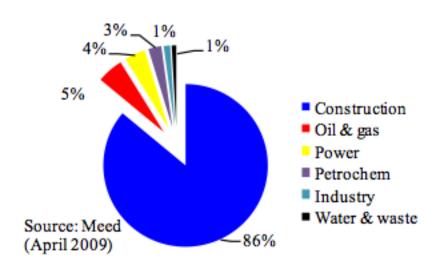
Source: MeedProjects

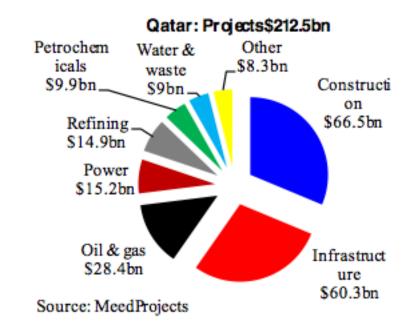




The 2020 Horizon: Project Pipeline

UAE: \$1.3 tr Project Pipeline

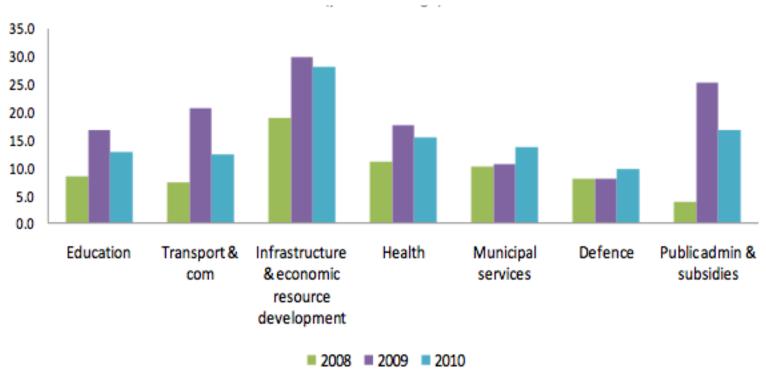






KSA Government Spending

Saudi Budget Appropriation by Sector 2008-10 (percent change)





KSA: Transportation & Logistics A peep



- US\$100 Billion investment is anticipated over the next 10 years
- Sea Port: 2 new ports+ container terminal+ Logistics Park
- Rail, Air & Road Opportunuties equally formidable

Qatar: World Cup Projects A peep



Nine new stadiums
70,000 new hotel rooms
\$20 B on road projects

\$25 B on rail

Qatar-Bahrain Causeway- \$4 B



KSA: Healthcare Agenda

A peep

HEALTH CARE REFORM



- Annual spending to reach US\$20 billion by 2016
- Hospital beds to rise from 51,000 today to 70,000 by 2016
- The number of hospitals will move from 364 to 502

UAE: Abu Dhabi Projects A peep



Abu Dhabi Metro - \$5-10bn Sadiyaat Cultural District - \$5bn Nuclear Power Complex - \$20-40bn Shah Sour Gas project - \$10bn Chemaweyaat Petrochemicals Complex - \$25bn plus





The Opportunity Triangle





CANADA Factor 1 **TALENT EQUITY** Arabs in Canada- Immigrant, Student Indians in Canada- Immigrants from India & the GCC, Students Indians businessmen & talent in GCC GCC business interests in India **INDIA**

GCC



CANADA

Factor 2

TRADE & BUSINESS EQUITY

- India & the UAE
- India & Saudi Arabia
- India- Favored Nation Status

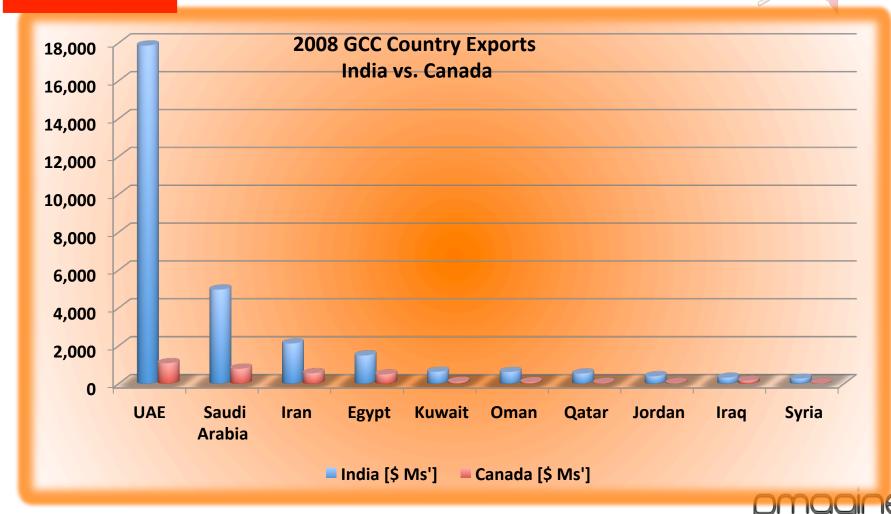
INDIA

GCC





Factor 2

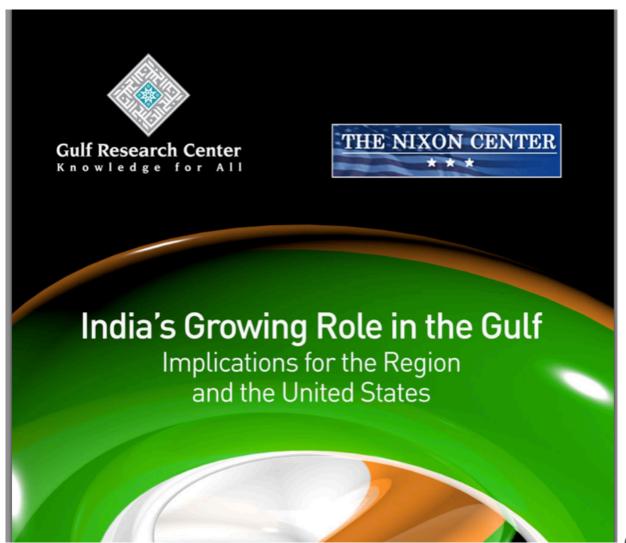


The Opportunity Triangle

- Three key factors that establish the link
- People Equity: Market savvy talent waiting to be tapped
- Trade & Business Equity: Phenomenal trade ties with UAE and Saudi Arabia. Close to \$ 23 B of Indian exports annually. India's energy needs. Indian business active in the Gulf
- Geography & Politics



US- Conscious of the Bonding





Talented Workforce:

- Over 42.5 percent of the work force in the UAE are Indians.
 Indians have been playing a major role in the economic
 development of the UAE over the last 35 years. Professionals
 and technically qualified Indians are engaged in huge
 numbers in all sectors
- In Saudi Arabia, the Indian community is the largest expatriate community and accounts for 1.4 million people
- Indians are recognized as one of the main agents of the GCC's economic progress
- India earns foreign exchange worth around \$6 billion annually from its Gulf expatriates. The remittances of expatriate Indian workers in the Gulf have contributed significantly to India's economic resurgence



Business & Commerce:

- Saudi Arabia General Investment Authority (SAGIA): more than 190 Indian companies received licenses the past two years to set up either fully-owned or jointventure projects with Saudis, pumping more than SR4 billion into the Saudi economy
- Almost every major Indian corporation has a presence in the UAE by way of actual investments, trade or representative office
- It is estimated that more than 3,300 Indian companies have set up manufacturing units or opened local offices in the UAE.



Business & Commerce:

- The economic dimension of India's Gulf policy has become more pronounced in recent years. As a group, the GCC is India's second largest trading partner. It is the largest single origin of imports into India and the second largest destination for exports from India.
- The GCC countries remain a major destination for Indian investments even as India is making a concerted attempt to encourage GCC investment in India. India is hoping that major GCC states such as Saudi Arabia, UAE and Oman would participate in India's planned expansion of infrastructure. With a rising demand for infrastructure development, India is looking for large investments from the Gulf, which is flush with funds. The Gulf States meanwhile are interested in human resources from India to develop sectors as varied as information technology, construction, transportation and services.



Political:

- India's growing economy and a market of billions would provide immense potential for the GCC countries to further their global economic presence.
- Coincidentally, being a neighbor and an emerging global power, India becomes a
 reference point for the Gulf countries as a partner in their quest for managing the
 evolving security equations. The change of perception in the Gulf region is based
 on a 'new constellation' in which India is increasingly viewed as a credible nonpartisan global player who can play a constructive role in managing conflicts and
 restoring peace and tranquility in the region
- During the state visit, King Abdullah and Indian Prime Minister Manmohan Singh signed an Indo-Saudi "Delhi Declaration" calling for a wide-ranging strategic partnership, putting energy and economic cooperation on overdrive, and committing to cooperate against terrorism. According to some reports, the King waived off Saudi bureaucratic concerns about precedents the declaration might create with regard to its relations with India's neighbors, especially Pakistan by calling India a "special case" and "his second home"



Energy

- With an economy that is projected to grow at a rate of 7-8 percent over the next two decades, meeting its rapidly increasing demand for energy is one the biggest challenges facing India.
- Burgeoning population, coupled with rapid economic growth and industrialization has propelled India into becoming the sixth largest energy consumer in the world, with the prospect of emerging as the fourth largest consumer in the next 4-5 years. Energy is clearly the driving force in Gulf- India relations. Riyadh is the chief supplier of oil to India's booming economy, and India is now the fourth largest recipient of Saudi oil after China, the United States, and Japan12. India's crude oil imports from the Saudi kingdom will likely double in the next 20 years.
- The GCC countries supply 45 percent of India's petroleum requirements,
 Along with the Saudis who are responsible for a quarter, other major suppliers
 are Kuwait and the UAE. Qatar is an annual supplier of 5 million tons of LNG to
 India and it is expected that Qatari gas exports to India will rise to 7.5 million
 tons from 2009



The Opportunity Triangle

CANADA

Today
Canada's
Gateway to
multi-markets,
across diverse
industries &
sectors

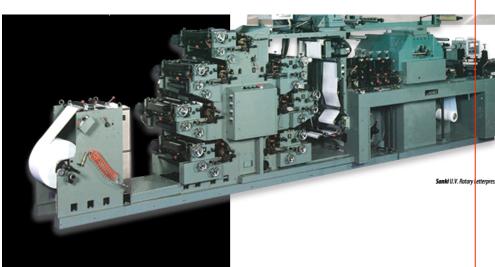
INDIA

GCC





Learnings from Rmagine Projects



Joint Venture-Printing, Packaging

Canada > India

Retail, Point of Sale

SMULL ROUGH FMCG Market

Assessment. Trade

Show Presence

Market Entry

Strategy



Exports- Lumber SPF

Canada> Caribbean+ Middle East+ India

Market Entry Strategy. Importer/ Partner Sourcing



Learnings from Rmagine Projects



Project Portfolio

Learnings from Rmagine Projects

Joint Venture- Heavy Engineering. Oil & Gas. Water & Power Sectors

Canada > Saudi Arabia, Qatar, UAE

Sector Overview. Market & Sector Entry Strategy. Agents /Joint Venture Partner Sourcing









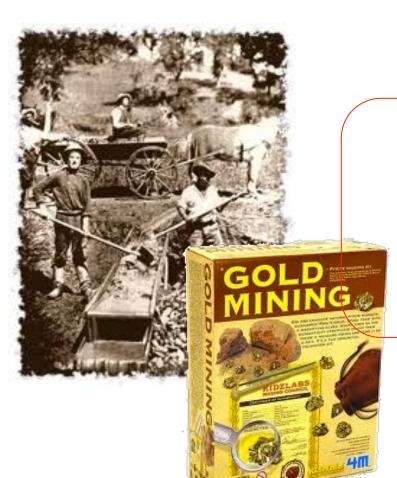
Joint Venture- Marble: IDC, Construction

Canada > UAE, Saudi Arabia, Qatar, Lebanon, Egypt

Market Segmentation. Entry Strategy. Trade Show presence. Partner Sourcing.







Project Finance/Listing- Gold & Copper Mining

India > Peru-Colombia > Canada

Targets Assessment Study. NI 43-101 Technical Study. Financing/Partner Deal

Learnings from Rmagine Projects







Joint Ventures- Prepaid Debit Card/Salary Card. Mobile Money Transfer

United States> GCC, India, Canada

Market Assessment. Market Entry Strategy. Branding. JV Partners Sourcing in each country

Learnings from Rmagine Projects



Rmagine- Your Chief Strategy Officer

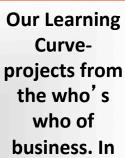
- Manage your desk research, market research
 & analysis
- Craft Market Entry Strategies
- Provide quick connect to potential buyers/ partners
- Mitigate risk





HCA London's number 1 private hospital group





India & the

Middle East























































LAING O'ROURKE





Johnson Johnson



Roster Consultant to BDC

 Strategy Consultant of the Business Development Bank of Canada- for BDC's SME clients who intend to expand into India & the Middle East

BDC (Business Development Bank of Canada) provides Canadian businesses with flexible financing, venture capital and affordable consulting services. We work with entrepreneurs in all industries, with a focus on small and medium-sized enterprises (SMEs), through all economic cycles and help businesses in





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May Lady Luck Smile Kindly On Your Global Efforts