

Survival of Indian BPOs: Talent Retention As a Focus of Attention

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Outsourcing is an important concept to understand because of its business applications (both for Corporations and for Small Businesses) and also because of its political implications. Firms invest in core processes but prefer to outsource critical, non-core processes to providers who specialize in them. The intent is to outsource the work while retaining the direction-setting part. Business Process Outsourcing (BPO) has been often cited as a trend that will continue to grow. India has emerged as the most competitive and popular IT outsourcing destination in Global Outsourcing Report 2005. With English speaking workforce and 24 hour workday culture, the industry continues to strengthen its position in the global outsourcing arena.

An alarmingly high attrition level is hurting the India based Business Process Outsourcing (BPO) industry and is negatively impacting both its buyer and supply sides. In a fast growing and dynamic market, attrition rates play a key role affecting the sustainability and future of the market. Attrition leads to several direct and indirect costs which have a clear impact on the service provider business case leading to a less viable outsourcing proposition. The paper attempts to understand the underlying reasons for attrition by analyzing the BPO industry in India through review of reports, articles and researches available.

Introduction

Firms essentially have three kinds of processes: core processes (which give strategic advantage); critical, non-core processes (which are important but are not competitive differentiators); and non-critical, non-core processes (which are needed to make the environment work). Outsourcing is the act of obtaining services from an external firm. It refers to the procurement of products and/or services from sources that are external to an organization (Karyda et al., 2006).

Outsourcing is deciding to obtain selected goods and services from outside your company (Engelke, 1996), finding new suppliers and new ways to secure the delivery of raw materials, goods, components and services, by utilizing the knowledge, experience and creativity of new suppliers not used previously.

Business Process Outsourcing (BPO)

Grossman and Helpman's (2005) statement, "We live in an age of outsourcing", clearly indicates that outsourcing is now an accepted business strategy. One of the forms of outsourcing is Business Process Outsourcing, i.e. transferring the operational ownership of one or more of the firm's business processes to an external provider that, in turn, manages the processes according to some predefined

metrics (Ghosh and Scott, 2005). It occurs when an organization turns over the management of a particular business process (such as accounting or payroll) to a third party that specializes in that process. Organizations are increasingly relying on offshore BPO partners for various operations. In some cases, organizations are outsourcing their entire global back-offices, including functions like human resources (HR), to leverage the cost and time advantages (Feeny et. al., 2005). BPO/ITeS (Information Technology Enabled Services) include services that can be outsourced using the powers of IT, like customer service interaction including call centres, back office operations/banking/revenue/accounting/data conversion/HR, Transcription services, Content development/animation, Data research, Market survey, Consultancy, Management etc. According to Antonucci and Tucker (1998), the key reasons for outsourcing comprise: cost reduction, care competent focus, flexibility while retaining control, and competitive advantage through strategic outsourcing. The extent to which outsourcing is possible depends on the industry, location, time, costs, and managerial perceptions of the risks involved.

Outsourcing draws upon both transaction cost and production cost efficiencies (Ramachandran and Voleti, 2004). The concept of outsourcing was first

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made popular by Ross Perot when he founded Electronic Data Systems (EDS) in 1962. EDS would say to a potential client, "You are good at designing and manufacturing widgets, but we are skilled with managing information technology. We will sell you the IT services that you require, and you can pay us periodically with a minimum commitment of two years". As a result, EDS became a multi-billion dollar company with over 70,000 employees and is only one of many global BPO firms. The concept of Outsourcing got an impetus with the Core Competency theory of C.K. Prahalad, which emphasizes that organizations should concentrate over their critical advantages and get out of every thing else.

The BPO/ITeS Sector is a heterogeneous and rapidly growing offshore market with a projected annual growth rate of 60% (Tapper, 2004). In 2003, India accounted for 75% of total BPO offshore delivery value (Neale, 2004). Brown and Stone (2004) reported that BPO accounted for 34 per cent of the global outsourcing contract value in 2004 and projected that BPO services would grow from \$1.3 billion in 2002 to \$4.3 billion in 2007 (Mehta et al., 2006; Budhwar et al., 2006). According to a survey by A.T. Kearney (2007), an unbeatable mix of low costs, deep technical and language skills, mature vendors and supportive government policies have taken India to the top among global destinations for offshoring services. This is despite all the concerns indicated about overheating, wage inflation and service levels, as reported in a recent survey (India Business, 2007).

According to a National Association of Software and Service Companies (NASSCOM)- McKinsey Report (2005) titled, "Extending India's Leadership of the Global IT and BPO Industries", India's leadership position in the global offshore IT and BPO industries is based on five main advantages: (1) Abundant talent: India had 28% of IT and BPO talent among 28 low-cost countries; (2) Creation of urban infrastructure that has fostered several IT centres in the country; (3) Operational excellence that has delivered cost and quality leadership in offshore service centres; (4) Conducive business environment including several favourable policy interventions such as telecom reforms; and (5) Continued growth in the domestic IT sector that provides enabling infrastructure and develops a broad-based skill base.

BPO's in India

The BPO industry in India has been growing at a mind-boggling pace of almost 60-70% annually. The robust growth of the Indian ITeS-BPO industry started with basic low-end work, and has come a long way today; offering high end knowledge services to clients across the world, and employing more than 0.7 million people. As per NASSCOM, the ITeS-BPO industry recorded revenue growth of 31.6%, amounting to US\$12.5 billion in FY08, of which export revenue accounted for over 87%. Consequently, the ITeS-BPO industry's share of the country's services sector has also increased to around 2.2% in FY08. While it took the IT industry almost 15 to 20 years to make its presence felt, the BPO industry has done it in less than five years. But problems are already rearing their heads. Indian BPOs are discovering that cost control is similar to shooting in a landscape of moving targets; bring one down and many more emerge. The growth in India is being fuelled by the growth of the economy, and, in particular, the growing availability of telephone services. The study has further pointed out that the BPO/ITES firms have realized the importance of retention (with India facing a level of turnover at 31%) and the firms have started paying special attention to career planning and on-going training of their staff.

The problem of attrition as mentioned above is compounded by other factors. A study carried out by Hill and Associates titled, 'Offshore Outsourcing World', in 2005, on the challenge of keeping people in the Indian outsourcing sector (with a respondent base of 1000), pointed out that more than 50% attributed this to the lack of growth opportunities, mismatched expectations, dissatisfaction with company policies, and the never-ending quest for career fulfilment. This stands to correct notions that salary, incentives and lifestyle ranked as the highest reason for joining the outsourcing sector, since only 35% cited these. The report further quotes, "Attrition not only pushes up costs incurred on the training of employees but also affects productivity along with the ideal level of "knowledge maturity" of the organization and the employees".

NASSCOM has formed a special task force to address the issue of ensuring availability of skilled talent in the long term. Employees in Indian call centers

assume pseudo names and answer calls from U.S. customers. They are made to learn foreign accents, work at night to cater to U.S. time zones, and adjust to an altered social and family life. These factors, unique to the call center work environment, are reasons for the high churn of employees and their perception toward their work. These employees also face the risk associated with working in a new industry.

People Equity and NFO India, a part of the U.S. based consultancy NFO WorldGroup, conducted a study on call center employees, interviewing 1,000 workers at 19 leading call centers including GE, Citibank, Transworks and Convergys. These units are mostly located in Bangalore, Chennai, Mumbai and Gurgaon near New Delhi. The survey results indicated that although employees are aware of the unique demands of the job, they are not prepared to handle the "work-life balance". They believe their employers are not doing enough to reduce stress at work. Furthermore, employees don't look at their jobs as a long-term career option and have low expectations of professional growth within the industry, the study showed. Most of the workers are well qualified or even overqualified. For instance, the survey found that 9% of employees hold MBA degrees. Units in Chennai employ the highest number of engineers and workers with a Master's in Computer Applications. The study noted that although employees don't complain about their salaries, they have a lurking feeling that they are not "being paid as per industry standards".

The BPO industry is facing a shortage in skilled resources even as it fights attrition. A study published in 2007 by the Associated Chambers of Commerce and Industry of India (ASSOCHAM) reveals that the market growth may slow down to 25% annually if the high attrition rate of 40% is not curbed on time. This translates to a growth in operating expenses for both high-end and low-end processes. NASSCOM reports that the BPO industry will experience a shortage of 2,62,000 skilled resources by 2012. When this is viewed together with the HayGroup study report that the cost of attrition for high-end businesses is 9% and that for low-end non-voice processes is 12.5% of the operating costs, the situation is quite grim. National projections suggest that, during the decade of 2000-2010, about half of all employees in

many IT industry-setting nationally will need to be replaced. Thus, the challenge for any organization is to combat the problem of attrition.

The Problem of Attrition

Attrition is a natural reduction in workforce as a result of resignation, retirement or death. Employee attrition costs 12 to 18 months salary for each leaving manager or professional. Although employee turnover can help organizations evolve and change, an American Management Association survey showed that four out of five CEOs view employee retention as a serious issue for organizational success. If managers know the real causes of attrition, managers can control attrition and retain employees. Each retained employee can save money and lead to better opportunities for each leaving clerical or hourly employee.

Call centers across the globe experience extremely high levels of employee attrition. Average employee attrition in USA and UK is as high as 70% per annum. While these national level data are alarming, most decision makers would rather know their own organization's attrition rate and the actual cost of that attrition to the organization and its stakeholders. Clearly, locally specific staff and cost data are better for motivating local action. Goel and Thakur (2007) cite the following reasons responsible for attrition in the BPO sector:

- 1) **Monetary considerations:** The expectations of employees in this industry have grown exponentially due to the strong demand in the marketplace.
- 2) **Slow career growth for internal talent:** Employees with prior relevant experience are a precious commodity in today's fast growing market. Therefore, it is not unusual for fast-growing companies to fill new jobs with external applicants who have prior relevant experience with other companies, bringing them in at one level higher than their current level or providing them a new role with greater responsibilities.
- 3) **Monotony:** In general, BPO work (especially work that has been offshored) has been repetitive, mechanical, service-level-driven and involves high transaction volumes. Younger recruits find it monotonous once they have mastered the process.

- 4) **Shift timings:** The majority of the work offshored to India has typically been from the United States (though share from Europe is growing) necessitating night-shift work due to time zone differentials. The proportion of employees who can work during the Indian work-day is low. Continuous night shifts affect the health of some, while others just cannot adjust to them.
- 5) **Working environment:** Attrition due to the work environment is typically due to a lack of trust in the fairness of the system, issues around safety and care of employees, effectiveness of the channels to address employee grievances, accessibility of the senior management team and other related environmental issues.
- 6) **Limited training and development opportunities:** Though not one of the top reasons for attrition increases, the lack of ample opportunities to learn new skills or undergo training or further education is occasionally cited as a reason for leaving.
- 7) **Deficiencies in the recruitment process:** To ensure that they rapidly meet high demand levels, service providers are not always able to hire resources with the right skills and experience when and where they are needed.
- 8) **Mismatched resources:** Resources who are put on assignments that are not in line with their skills or career aspirations may leave if they are not rotated to a favourable assignment soon enough.
- 9) **Concentration of demand for talent:** Most service providers are located in five to six large Indian cities, which has led to excessive concentration of demand and competition for resources in these geographies.
- 10) **Limited talent pool supply:** While there is an abundant supply of educated people, the supply of an employable pool is less.
- 11) **Shortage of management pool:** The supply of supervisory and management talent is relatively limited because it requires prior experience. Given the pace at which jobs are created in this market, it is difficult to find management staff with the optimal experience levels.
- 12) **Career outlook:** The workforce entering the BPO sector is very young and sometimes immature (entry level graduates with a three-year college degree are only 21 or 22 years old). Many of this

younger population are not sure what they want to achieve in their careers and represent flight risks.

Attrition in the BPO industry is two fold. One part of the attrition is where the employee leaves the industry entirely. The other section of attrition is where the employee joins another firm in the industry. Both the sections have separate reasons which need to be identified. The primary reason for people leaving the industry is due to the cause that the industry is viewed as a gap filler occupation. The industry has been mainly dependent on youngsters who are taking out time to work, making money in the process also while thinking of career alternatives. Hence for this group BPO is never a long term career but only as a part time job. The easy availability of BPO jobs is only a source of easy money till the time there is no other source of funding. Also the unfriendly working conditions, late night work shifts, high tension jobs acts as a deterrent for people to stick to this industry for long time. Regarding the attrition between firms, the chief cause is the unavailability of resources in the job market causing a great demand compared to the supply available. Presently there is no certified institute providing BPO specific training and education. The scarce resource in the market leads to wide scale poaching and head hunting amongst the competitors for the common pool.

High competition within the market, routine work such as invoice processing or supplier payments, time shifts to address business hours in Western countries, mismatch of expectations whilst many MBA and PhD individuals are performing entry-level tasks or constant work pressure are some of the industry specificities which make BPO sector a leader in terms of attrition rates.

What has to be done?

The outsourcing boom has begun to play a large role in India's growth process. Today, 5.2% of the country's GDP comes from export of IT and IT enabled services. But despite 60 years of independence, our system does not ensure 'education for all'. Out of the 200 million children in the age group of 6 to 14 years, 59 million children are not attending school in India. Even those who get educated are often not employable. Every year 3,00,000 engineering graduates and approximately

2 million graduates pass out of colleges. But only 10-15% of graduates are suitable for employment in offshore IT and BPO industries. Nearly two-thirds of the 3,00,000 engineering graduates need to be reskilled, so that they can get jobs in the IT industry. Even those who find jobs need to undergo training and be re-skilled. Today, India needs to skill/re-skill 1 million working executives. Emerging sectors such as retail, banking, financial services and insurance (BFSI) industries are facing acute shortage of manpower. The banking industry, which currently employs 9,00,000 people, is expected to add 6,00,000 more over the next five years. But it is unclear how this increased demand will be met. The shortage of skilled talent threatens to slowdown the Indian IT and ITeS industry, if the education system does not keep pace with the rising talent needs. As per estimates, by 2010 the industry will need approximately 8,50,000 additional skilled manpower.

As a result, talent management is fast gaining a top priority for organizations across the world. Though there is a ready supply of entry level employees, middle and senior managers are relatively difficult to find, and thus poaching is increasingly common. There is also a high incidence of people leaving new jobs after only three months, meaning a huge waste of training resources. According to a review paper titled "Keeping employees in Indian call centres: How to address poor rates of retention" published in 2008, the attrition rate in the sector is between 30 and 35 percent. Given that manpower demand is expected to continue to surge over the next five years, companies will be facing major financial loss in recruitment, brand identity and performance if they fail to address these central HR issues.

The various aspects of talent management are recruitment, selection, on-boarding, mentoring, performance management, career development, leadership development, replacement planning, career planning, recognition and reward (Heinen and O'Neill, 2004; Scheweyer, 2004). Competition and the lack of availability of highly talented and skilled employees make finding and retaining talented employees major priorities for organizations (Fegley, 2006). In order to attract and retain the best talent anywhere in the world, an organization must have a strong and positive employer brand (Brewster et al., 2005).

Employee engagement as a key to the retention of talent is an area in which the lead has been taken by practitioners (Parsley, 2006; Baumruk et al., 2006; Woodruffe, 2005). While it is evident that the impact and costs of high attrition rates within the BPO industry are extremely high, there is a general feeling of the industry to fight and decrease this phenomenon. BPO players are investing more in their strategies to recruit and retain the best staff in the market. Some of the fundamental initiatives for reducing the high existent attrition rates are:

- 1) **Recruitment of the right skills:** HR Departments should have a clear definition of the job position as well as identifying the right skills needed to perform the respective role. A clear expectations set should be established at the interviewing stage.
- 2) **Developing right skills in house:** Employers should provide sufficient and meaningful training and development opportunities and link attendance at such programs to the performance management system. Further, it is helpful to provide advanced education opportunities (subsidized or free) to those aspiring to study further without having to lose their gainful employment.
- 3) **Pay for complexity:** The current standard practice is to pay associates based on vintage, tenure, (length of service), organization level and/or shift timings. Most work is treated at par for determining compensation, meaning that all job profiles of the same level- whether Human Resources, Finance and Accounting or any other process work are compensated at same level. The only compensation differentiation most companies make is between voice and non-voice work (voice work, which is more stressful, pays better because attrition in this area is relatively higher).
- 4) **Career Development:** Being part of a world known brand is something commonly empathized by the suppliers to attract the cream of the market. The mismatch of expectations leads individuals to believe reaching a high position within a short period of time. In practice this does not happen in such a straight forward manner and only a couple of individuals see themselves escalating the hierarchy.

- 5) **Job rotation:** This is a known practice among BPO. The suppliers provide very similar work for different clients. It is a common practice to rotate people across clients within the same horizontal (i.e. Finance and Accounts, Insurance, Customer Relationship Management, etc.). Rotation across horizontals also happens. Rotation across delivery centres is something to be seen lately especially for global deals where the team is spread around the globe. Job rotation is meant to reduce monotony, introduce a new challenge to the individual, proportionate awareness of company dimension, and interact more effectively with colleagues physically distant.
- 6) **Competitive compensation:** The overall compensation and benefits package should be competitive at all levels for the service provider to maintain its declared market positioning. Techniques include setting a compensation positioning for the company and clear and rigorous communication of the same to employees to keep them informed. Using deferred income or bonuses that are payable at the end of the year aids in employee retention.
- 7) **Process Documentation:** In order to address the loss of knowledge from a particular individual leaving the company it is best practice in the industry to have updated process documentation. The process and key stroke documentation is done during the knowledge transfer phase. After this a Frequently Asked Question (FAQ) is maintained which captures all the specifics of the process which are not captured in the process documentation. This will then be included in the process documentation every 6 months. By having this approach, suppliers try to capture all knowledge existent which can then be shared during hand over with the new comers.
- 8) **Quality and Process Improvement Initiatives:** The incentive for participating in quality and process improvement initiatives aims, on the first hand, at improving quality and performance offered to the client. The flipside of this is to give individuals extra responsibility which is often seen as a trust and role enhancement due to their high performance.
- 9) **Working environment:** Providing and facilitating the right working environment is critical to retaining employees given the nature of the work. This includes providing a safe and secure workplace to all employees and transparency and objectivity in performance management, compensation and promotion policies to build and maintain confidence.
- 10) **Communication:** Service providers have learned the importance of implementing a strong and effective communication program with employees. Nothing can substitute for frequent communications from top management on the state of the business, future business plans, promotion policies, fun in workplace programs and so on. Experience has proved that there is no risk of over-communicating. Occasional face-to-face meetings combined with other methods of employee contact work well to keep employees connected to the organization and go a long way in building loyalty to the business.
- 11) **Employee satisfaction:** Employers should conduct employee feedback surveys periodically and should take the feedback from these surveys seriously. They should act on the feedback and demonstrate commitment by tracking initiatives for improvement through to completion.
- 12) **Talent pool enhancement:** Service providers should work collectively at the industry level to enhance the quality and relevance of education. Intermediaries could play a significant and important role in polishing the raw diamonds for this industry. This is also a great business opportunity for firms that specialize in training in specific domains and soft skills. Specialized training firms will see increasing demand to act as intermediaries and perform the task of training fresh graduates to make them employable as well as helping potential recruits hone their skills in Finance and Accounting, Customer Service, Interviewing, Communication and Presentation, Supply Chain Management, Financial Services and other functions. These intermediaries could work with service providers to ensure that what they teach is relevant and effective for end users.
- 13) **Alliances with universities/colleges/schools:** Alliances should be formed with educational institutions to introduce relevant and quality content. Service providers must commit to investing time and money to provide content and teaching material to upgrade teaching skills in a "train-the-trainers" format.

14) **Broaden resource allocation:** As the industry continues to grow, it is important that the India based industry evaluate setting up delivery centers in non metro (Tier II and Tier III) cities. Some large players have already begun this process and more are likely to follow suit. For example, Genpact operates from Jaipur and now even Bhopal. Infosys BPO (formerly known as Progeon) has set up a center in Jaipur as well.

Conclusion

The manpower crunch in India is more serious than we think. The reason being while urban India has witnessed a stupendous growth in jobs, in much of India children still drop out from school, girls are still not sent to school and youngsters are forced to take up jobs instead of completing their graduation. NASSCOM ITES-BPO forum has identified HR as one of the key challenges of the ITES-BPO industry. To arrest the problem of attrition, companies can look into various options like good rewards, bonding programme, flexible working hours and stronger career path. With attrition rates ranging between 30-60% in the BPO industry, a scientific and analytical approach should be implemented.

Constant media coverage around attrition rates leads to the inevitable question of whether India can sustain its reputation as the offshoring destination of choice. India is undoubtedly the leader in the global offshoring industry today, and is likely to remain so for the foreseeable future. However, service providers need to work at the micro and macro levels to manage attrition and other ills of the industry to ensure that the country retains its fair share of the total global outsourcing business. The strategies suggested in the paper are not exhaustive to retain the human capital of BPOs and there can be many more ways of doing the same.

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Appendix

Table 1: Employee-wise Top 10 ITeS and BPO Companies

Company	Employee Count
IBM Daksh Business Process Services Pvt. Ltd.	29,865
Genpact	25,366
Intelenet Global Services Pvt. Ltd.	25,300
Aegis BPO Services Ltd.	20,555
WNS Global Services Pvt. Ltd.	17,970
Firstsource Solutions Ltd.	17,369
Infosys BPO Ltd.	16,295
Mphasis Ltd.	15,000
Convergys India Services Pvt. Ltd.	12,000
Citigroup Global Services Ltd.	11,692

Source: "India's Top ITeS and BPO Companies",
Dun & Bradstreet, Fourth Edition, 2008