

Sanjay Malla



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Director – Sales

Toradex Systems (India) Pvt. Ltd.

1. What is your perception of the Indian electronics and semiconductor industry?

We still have total semiconductor consumption in India met mainly through imports. Going forward whether it is medical electronics, consumer electronics, telecommunication, office automation, industrial automation or automotive there is going to be more & more demand for semiconductors. We expect Mobile Devices, Telecommunication, and IT&OA to be top contributors in terms of % share of TAM. We at Toradex see good potential for our range of modules in segments like – medical devices, auto infotainment, industrial automation & defense. Consumers are experiencing limitations on microcontroller based systems and that is where computer on modules (CoMs) based solutions are positioned. We offer complex technologies in a broad range of highly miniaturized embedded products. This segment CoM is still in its early stage and there is a huge potential for this category to grow in the near future.

2. What are the top 3 innovative trends Toradex sees in ESDM technology?

With more push from Government in building & strengthening Infrastructure in the country, it would be just right to say that this push in Infrastructure will in turn trigger semiconductor consumption & growth. Telecom & Energy sector are the key areas. We see miniaturization happening in mobile devices which demands low power consumption and therefore people are finding out ways to reduce power consumption demand of their devices in order to expend the battery life of their products. Our CoM based products offer high performance low power solutions for this industry need. People are using more compact energy efficient devices based on SoCs and we build CoMs using these SoCs to offer ready to use application specific solutions. LED TVs and all consumer electronic products will get more intelligent & smatter in the near future.

3. What part does India play in the overall technology strategy and marketing strategy of Toradex?

We have taken a strategic decision to set up our operations in India. We have already set up our engineering center in India that will support our team in Switzerland and also our plan is to use our engineering center in India to support south-east Asia market. We are building our hardware & software capabilities to offer complete solutions to our customers. We want to be their long term partners and not just a supplier of hardware boards. Our focus is to build robust processes so as to deliver superior customer experience.

4. How does India fare with regard to innovation in the semiconductor domain? How do you place the competency of Indian product and design companies as compared with MNCs?

Everything than can be invented has been invented is truly a mistaken assumption. Today we actually see it is the innovation that keeps countries & product companies ahead of each other. We firmly believe India does have capability to be the hub of innovation in the semiconductor domain as it has been in the field of software development. I think competencies of Indian products and design companies are equally good. Actually, this concept of Indian products & designs is thoroughly misrepresented globally. Any product you take has actually something called visible innovation and invisible innovation. When we say visible innovation we look at the end product from end users perspective but invisible innovation is an area were India and Indian capabilities is very well represented. What goes into products like I Pads and iPhones gets designed and innovated in India design centers but because it is not visible to the end user we hardly recognized. So competencies of Indian products & design centers are not far behind MNCs.

5. What would be the key market drivers in 2013?

As a company we are seeing trend towards applications moving on to low power SoCs. What we are bringing to the industry and customers is more computing power and more functionality using these SoCs and building computer on modules which enables customer to speed up their new product development and bring new products to the market much faster than their competitors. I think this trend will pick up and continue to gain momentum as computing power is moving to handheld devices which demand less power consumption but more versatility in terms of functionality. CoMs are exactly designed to deliver that kind of superior experience in application specific areas.

6. How is the regulatory environment in India impacting the Indian semiconductor industry?

The regulatory environment is now slowly allowing the Indian semiconductor companies to take a long term perspective as recently announced policies have encouraged companies to invest & build necessary infrastructure. The fact that our company has invested in setting up engineering center in India goes to show that we are looking at India seriously & positively. We are able to find highly talented and highly educated workforce here the good thing is that they are already having some decent work experience in semiconductor domain. So this regulatory environment has not changed our India plans at the moment and we will continue to stay invested here.

7. In your view, what should India's focus be for the next 2 years?

I think going forward India's focus should be to completely reform labor market if India has to generate sustainable employment generation model. Educational system needs complete overhaul and there has to be some program to encourage companies to invest heavily into R&D. If we have to be leaders in let's say semiconductor sector, we must encourage products innovations, find ways to improve our cost structures that will allow us to stay competitive and attract good talent.

8. The domestic demand for electronics is not being met due to inadequate production, what should be the steps taken forward?

Inadequate production means less or no manufacturing happening in India. We have to bring in big investments into infrastructure projects and that can happen through PPP mode and also if big corporates are encouraged to step forward. Being an emerging country, we have to strengthen our Institutions be it our banking & financial sector, regulators and somehow make efforts to fill up Institutional voids that are present in the market. Labor market reforms, Land acquisition policies, education system will all be the right steps in encouraging companies to set up manufacturing plants that will address this gap between demand & supply for electronic products.

About the author

Sanjay Malla

Sanjay Malla is Director – Sales at Toradex Systems (India) Pvt Ltd. Sanjay has work experience of 20 years in the field of Semiconductor Sales & Marketing. He was worked with Zenith Computers, Ultro Technologies Singapore; Desner Electronics Singapore managed their Indian Operations.

Sanjay Malla has done B.E Electronics from Nagpur University. He is MBA in Strategy & Marketing from IIM-Kozikhode. He has also done Leadership & Change Management program from IIM-Ahmedabad.