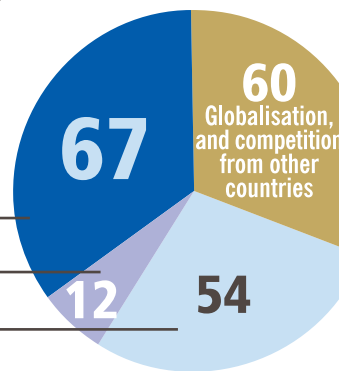


THE FUTURE OF INDIAN IT

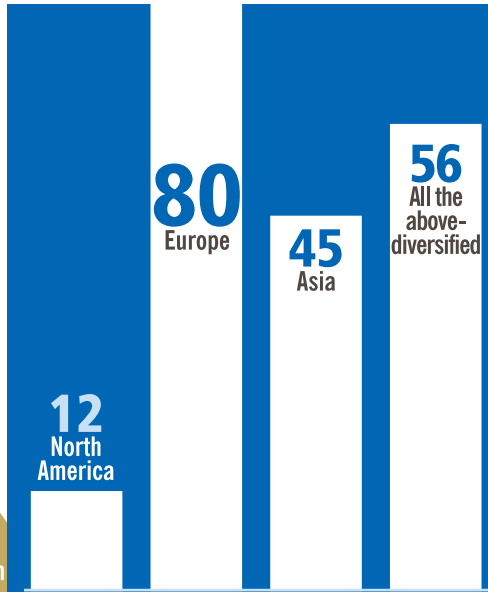
A BT-NASSCOM-Perot survey of visitors to NASSCOM 2008 throws up some answers

Q What is the chief operating challenge for Indian software companies?

- Staffing (recruitment and retention of workforce)
- Cost structure
- Providing customised industry solutions versus "off-the-shelf" solutions



Q Where will the next surge in outsourcing come from for Indian IT companies?



Q 2007 will best be remembered (in the IT market in India) for the:

- 70** Consolidation of Indian/multinational service providers
- 55** Inability or difficulty of India-based service providers to sustain past growth percentages
- 47** India-based service providers' dominance against multinationals
- 21** Increased competition from China

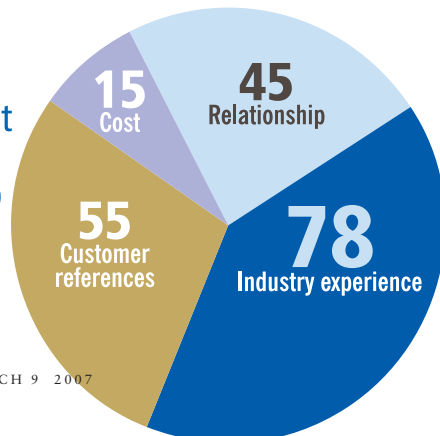
Q How important are industry-specific vs non-industry-specific BPO solutions?

- 117** Very important
- 62** Moderately important
- 14** Not a consideration

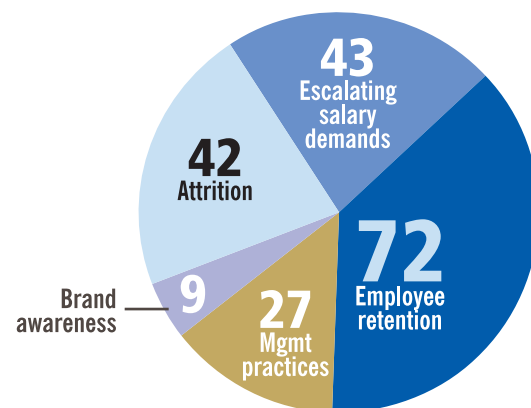
Q What motivated organisations to implement an outsourcing strategy in 2007?

- 113** When there is a compelling value proposition
- 37** When executive management demands it due to market pressures
- 30** When cost-reduction is paramount
- 13** When competitors are doing it

Q What is the most important criteria in making a BPO buying decision?

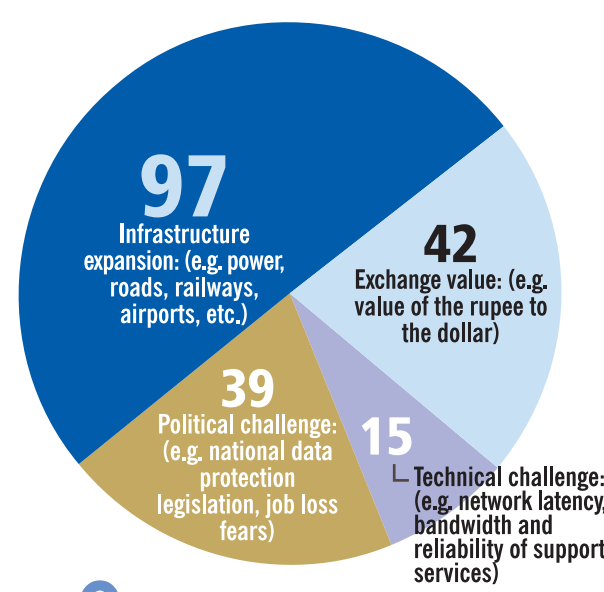


Q The most pressing issue facing Indian IT firms related to staffing is:



Q In 2007, how did IT firms distinguish themselves on infrastructure?

- 108** Extending capacity and capabilities
- 32** Providing greater utilisation
- 31** Deployment (e.g. mobility)
- 22** Security advancements



Q Which issue facing India seems to offer IT its greatest challenge?

Q How many senior-level women professionals are there in your company?

- 60** 10% to 25%
- 56** 5% to 10%
- 48** Less than 5%
- 23** 25% to 50%
- 6** More than 50%

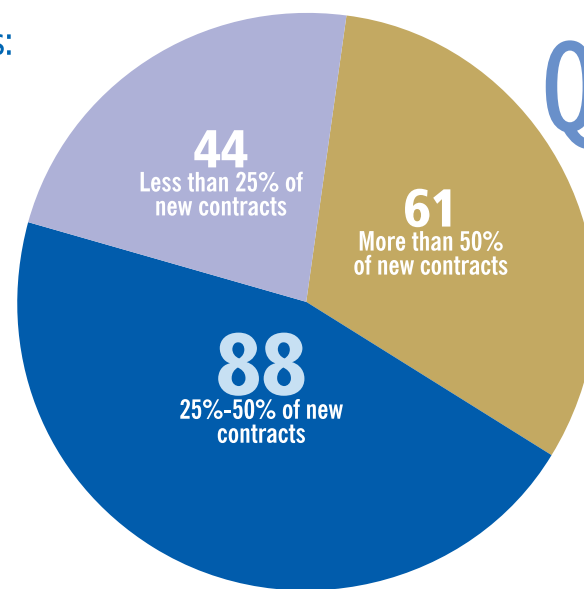
Q Are new and innovative solutions rewarded?

- 97** Sometimes
- 75** Often
- 17** Rarely
- 4** Not at all

Q What are the hottest Tier II cities for IT in India?

- 99** Pune
- 36** Coimbatore
- 25** Kolkata
- 25** Kochi
- 8** Any other

Q Do you think customers are increasingly asking for integrated solutions involving consulting, applications, business processes and infrastructure in...

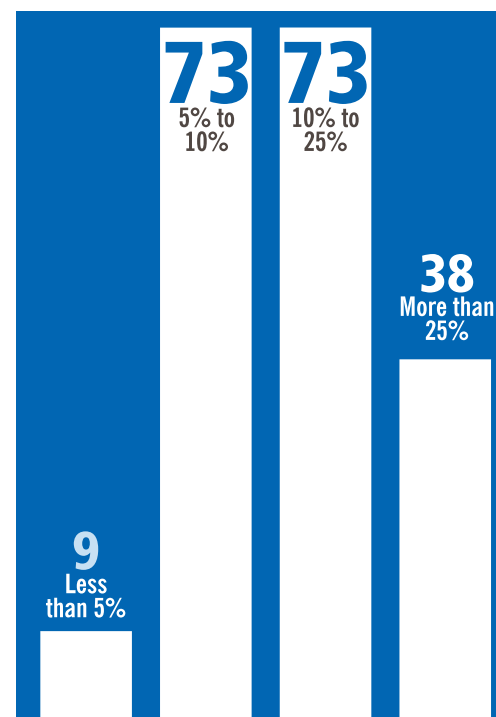


Q What growth do you anticipate for infrastructure services delivered from India in 2008?

- 78** 15%
- 66** 25%
- 39** >25%
- 10** 0%

Q What percentage of business contributes to innovation vs meeting customer demands?

- 93** 10% to 25%
- 45** Less than 10%
- 38** 25% to 50%
- 17** More than 50%



Q What growth do you anticipate for Web 2.0 technologies to be deployed by IT companies in India in 2008?

Sample Size: 193